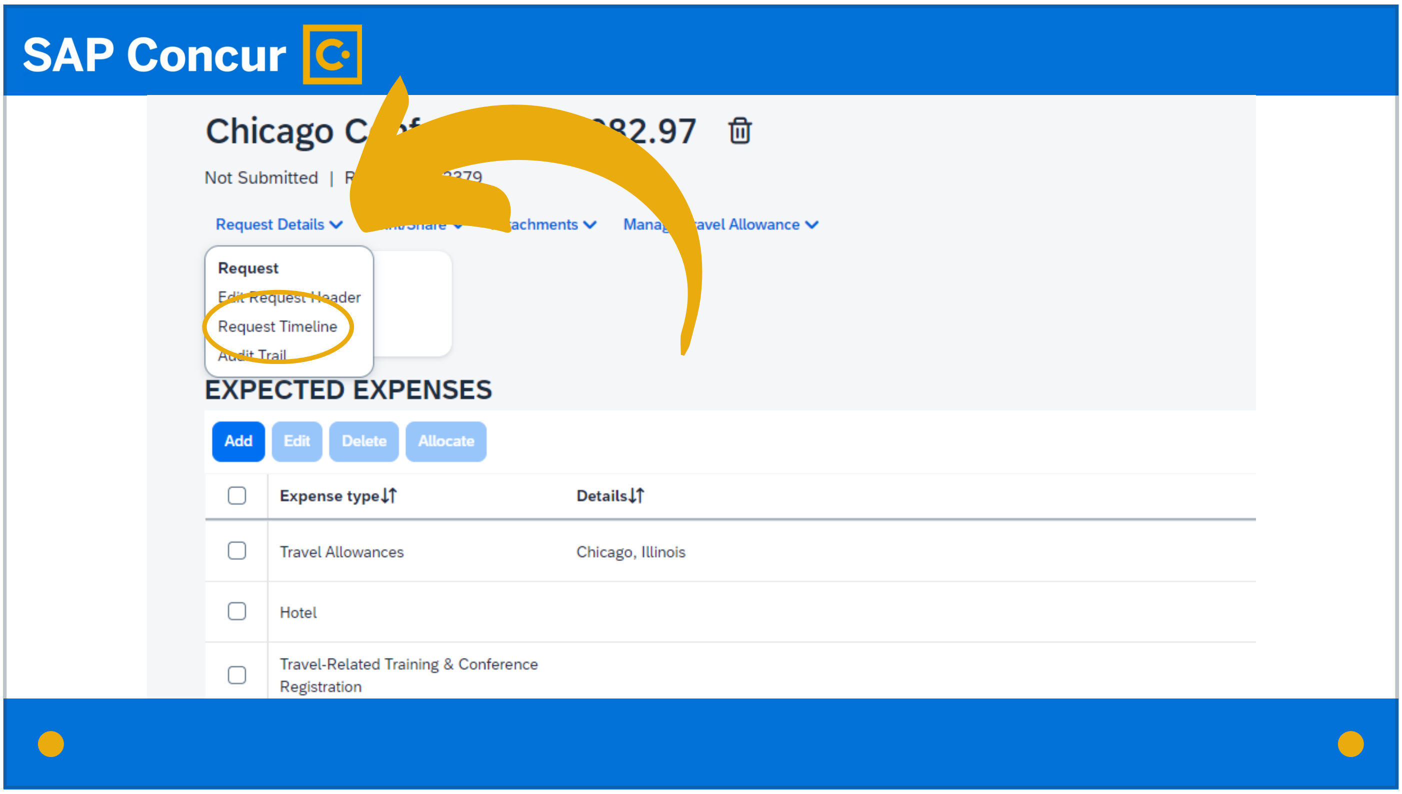
SAP Concur

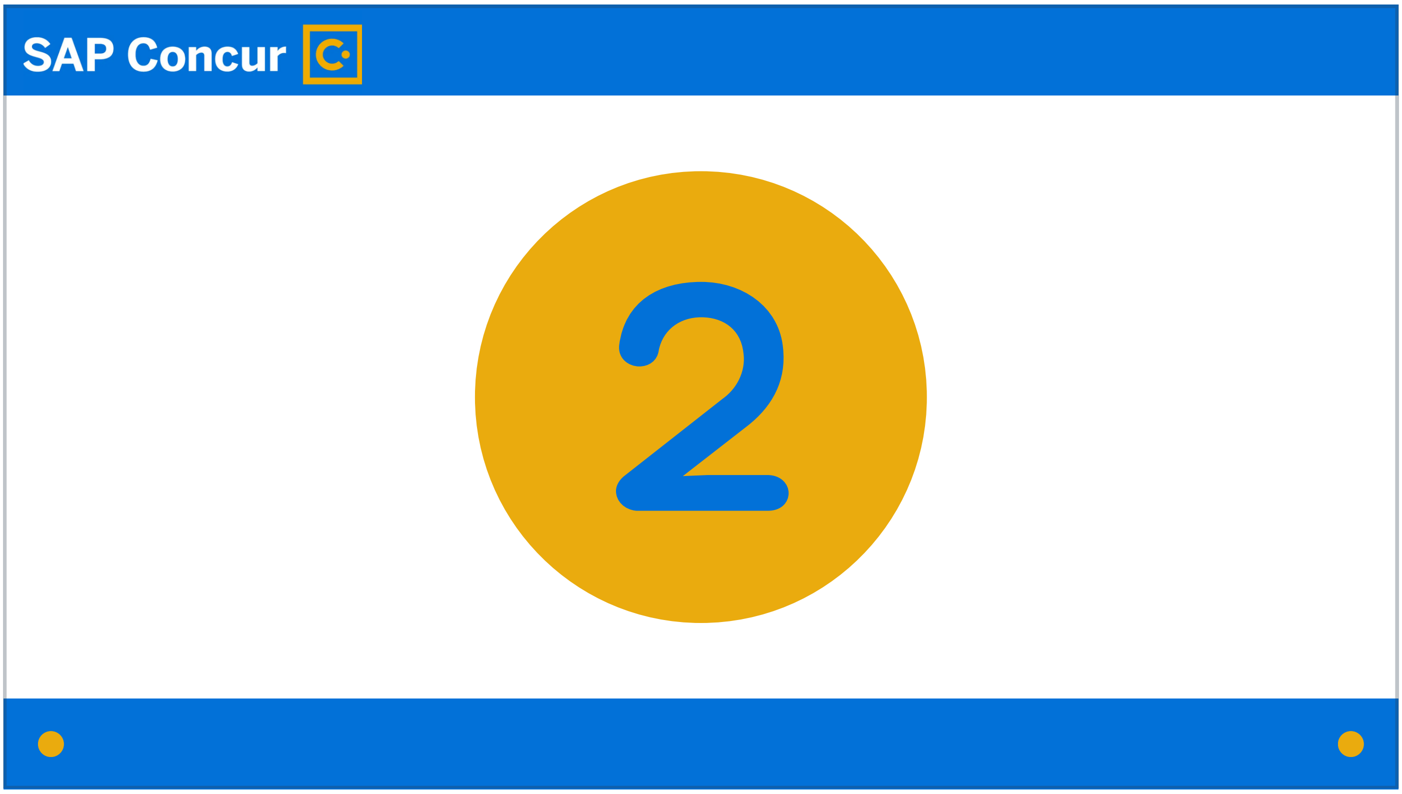
Workflow:

Card Request Workflow Processes

Welcome to our training on the card request workflow process in Concur.

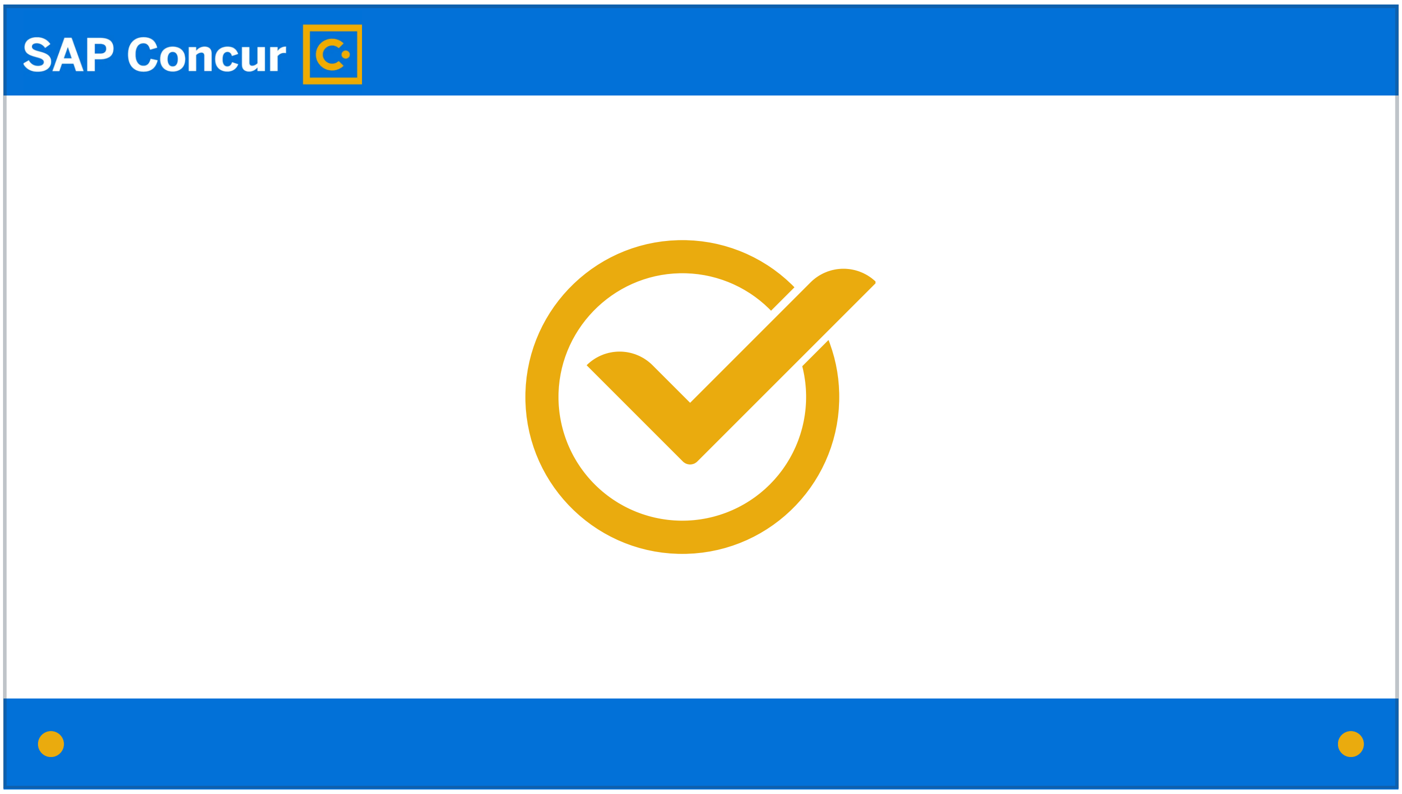


In Concur, a request’s specific workflow can be viewed by clicking on the Request Timeline under the Request Details dropdown menu.

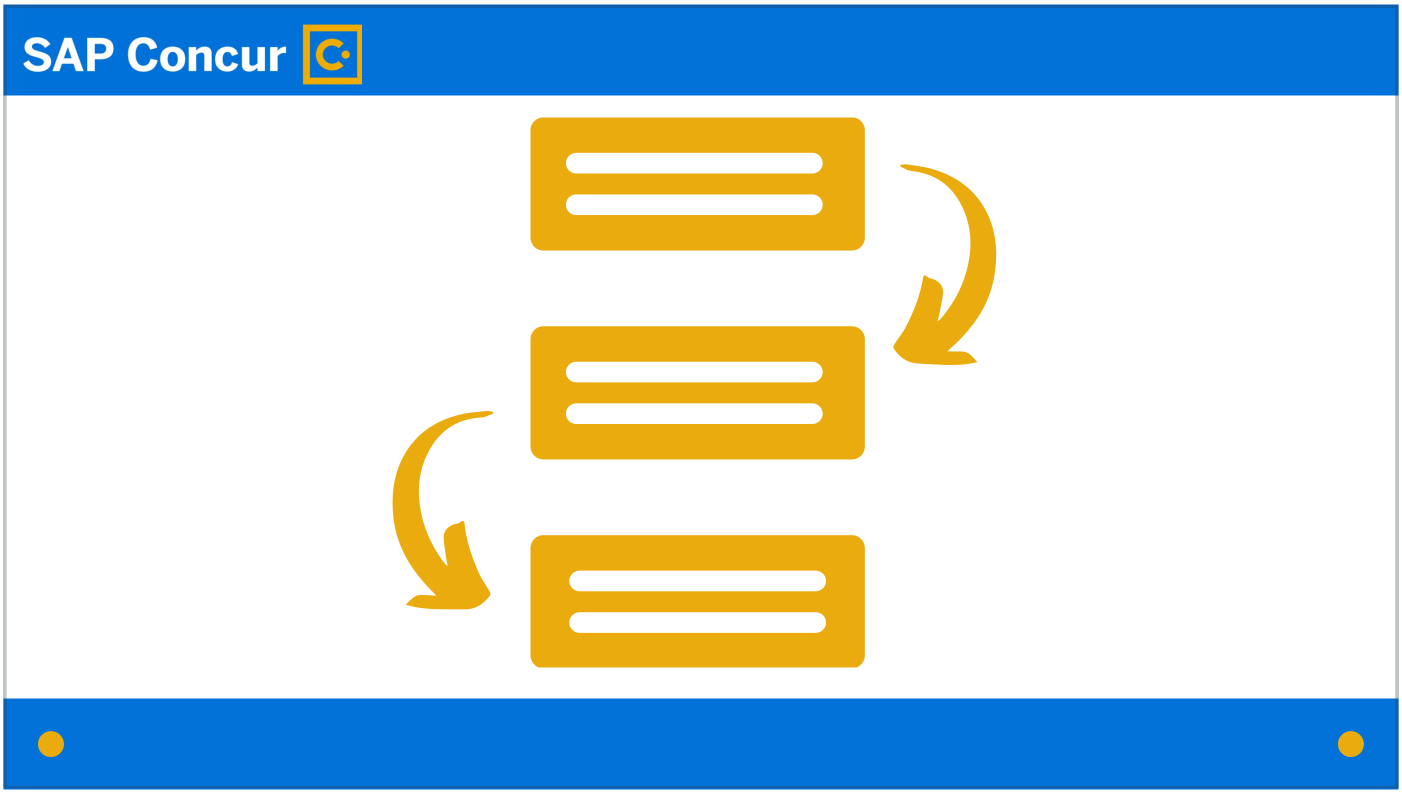


The workflow involves two things:

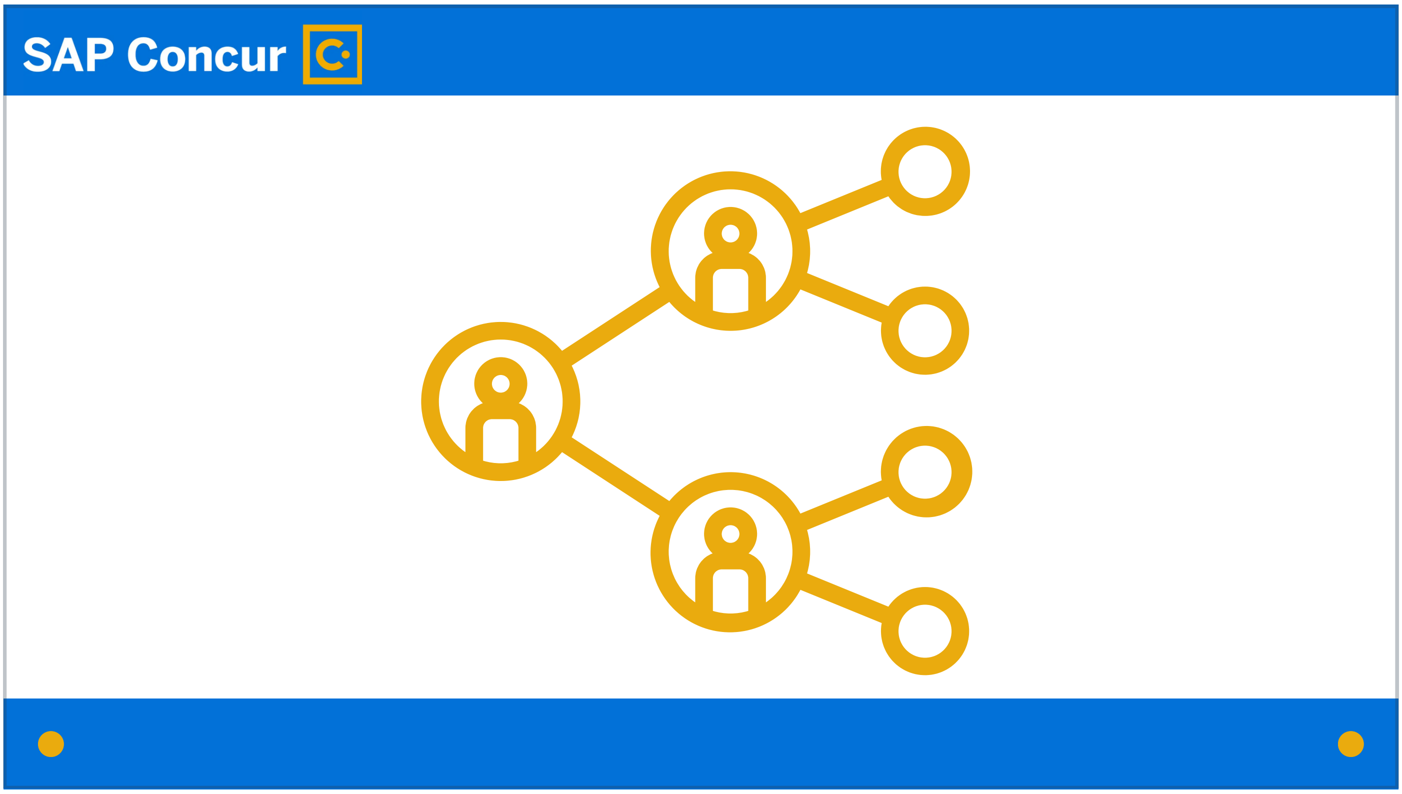
the review of data within submitted requests



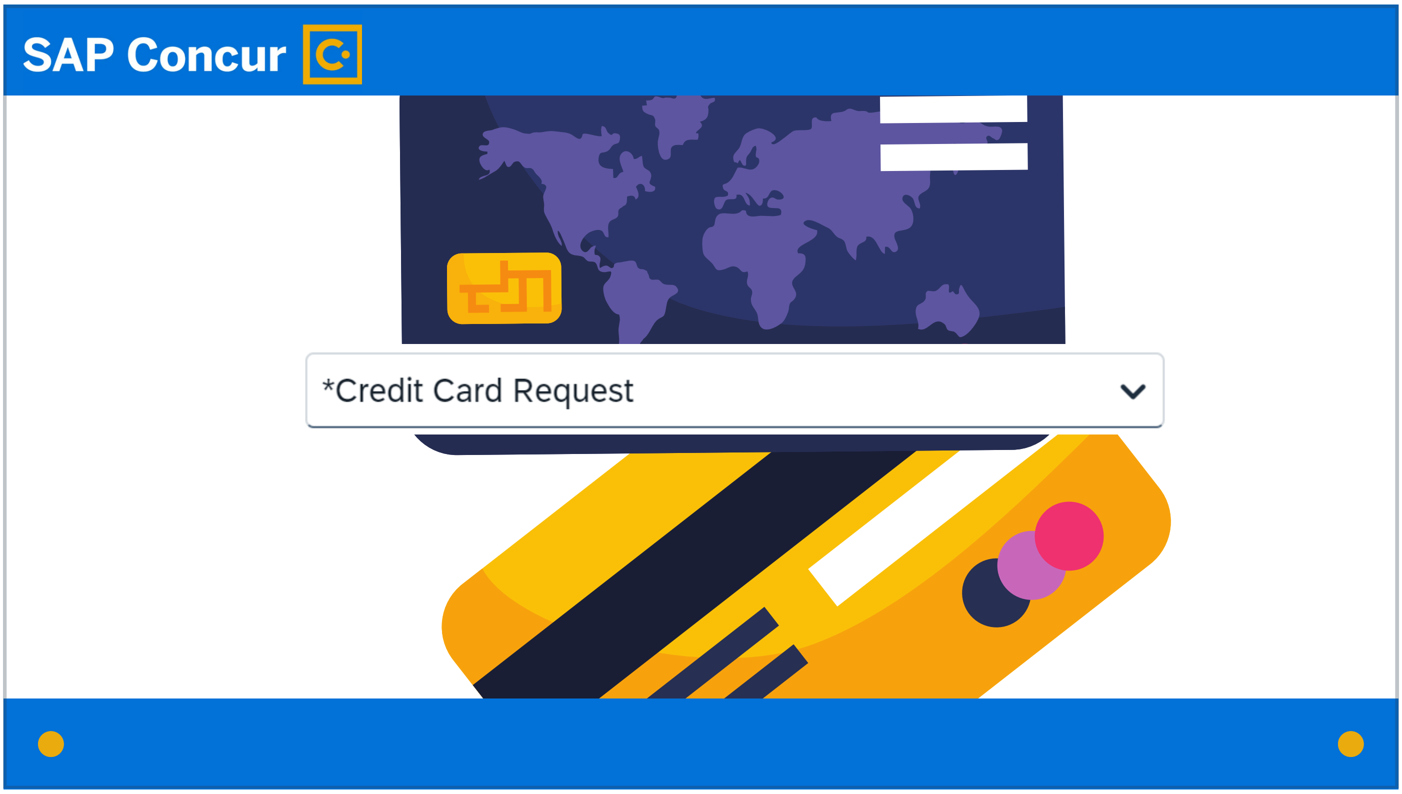
and the approval of those requests.



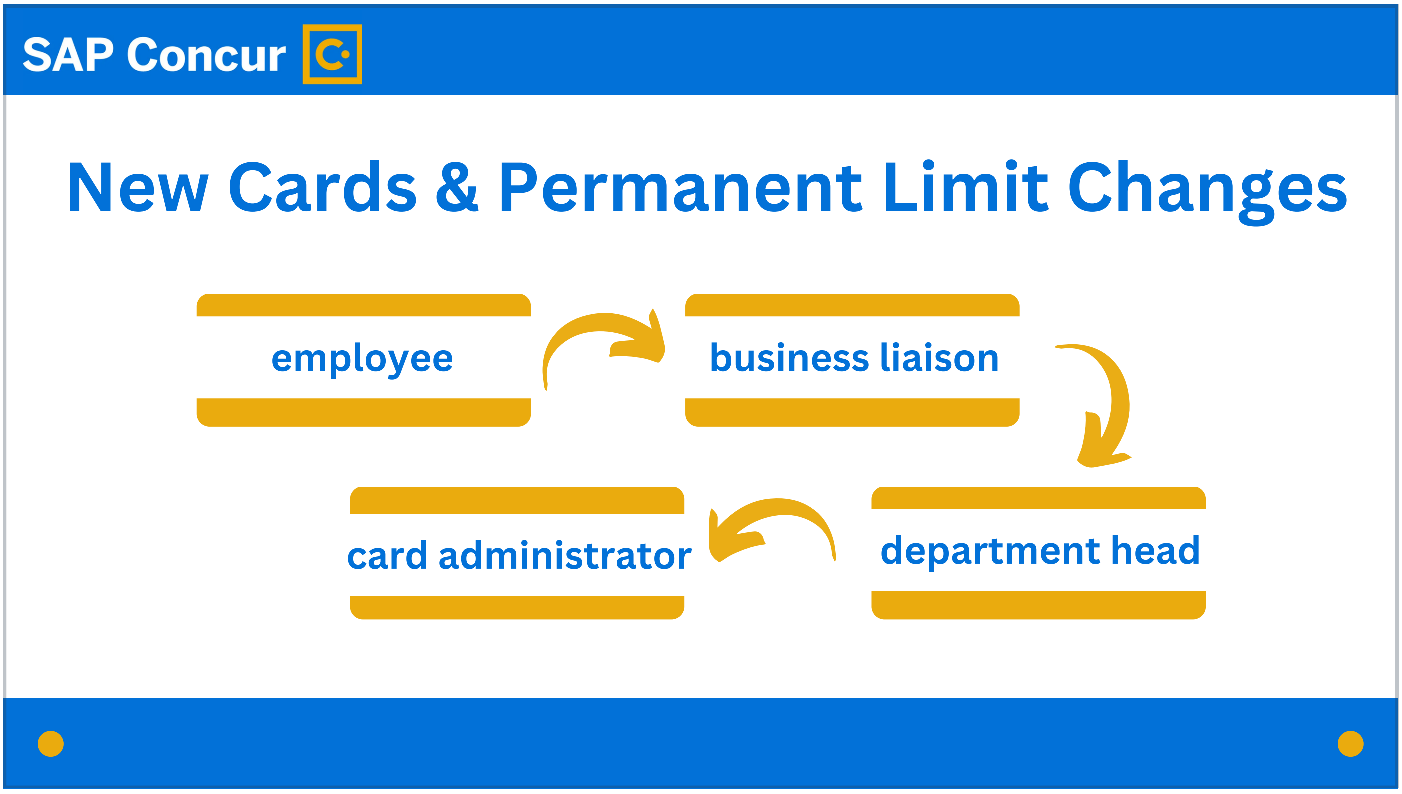
We will look first at the general workflow processes



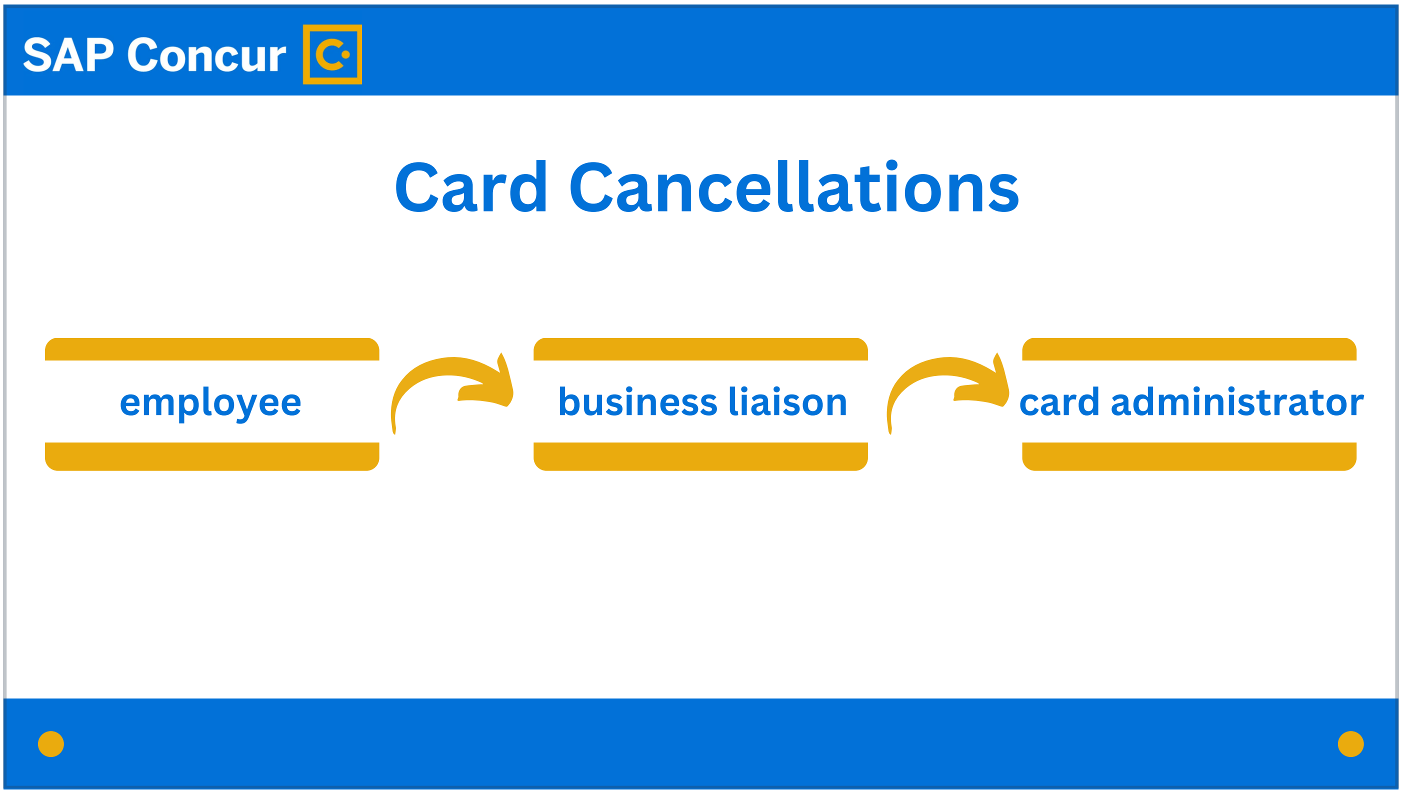
and then break down the responsibilities of each person in those processes.



For university credit card requests, the workflow depends on the type of credit card request submitted.

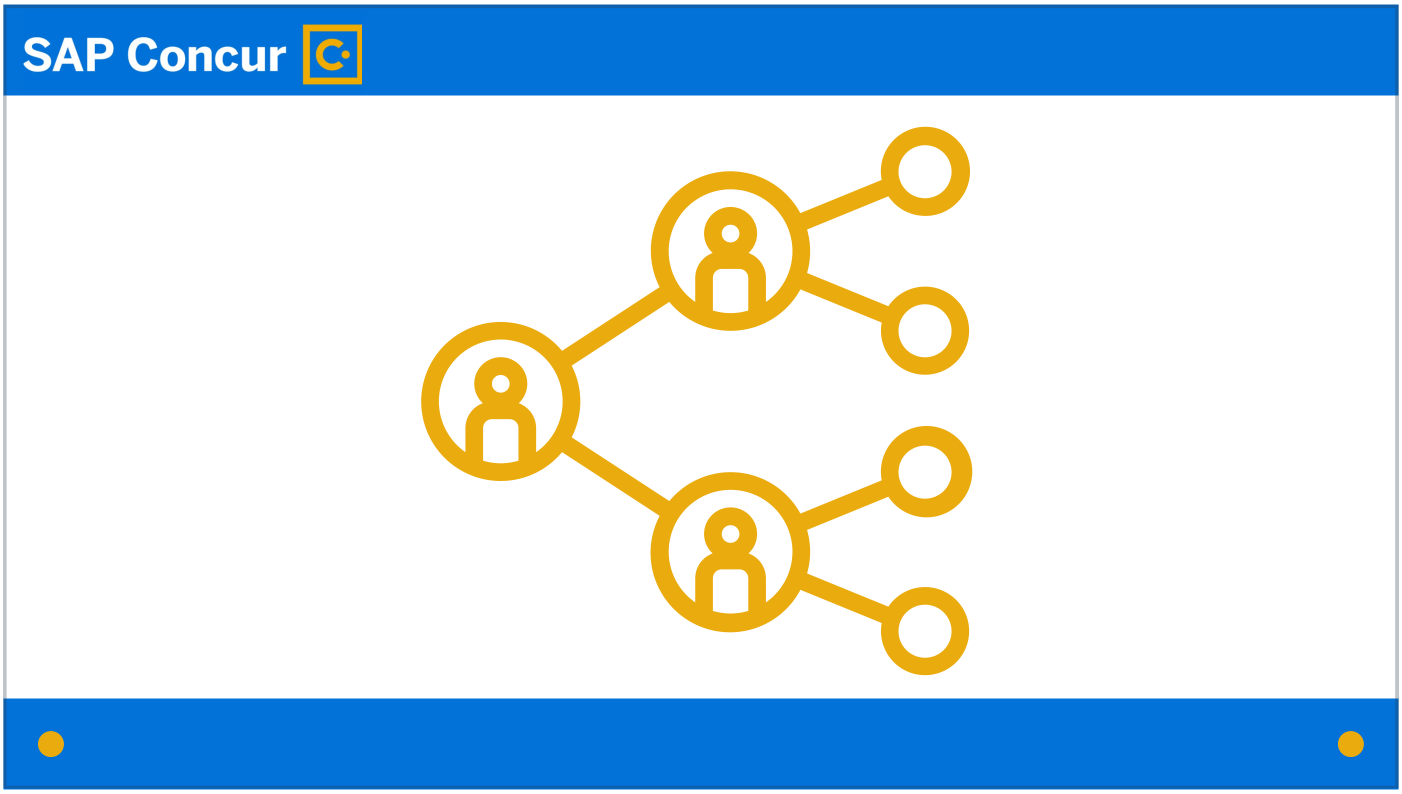


For new card requests and permanent limit change requests, the workflow moves from the employee's submission of the request to the business liaison to the department head to the card administrator.



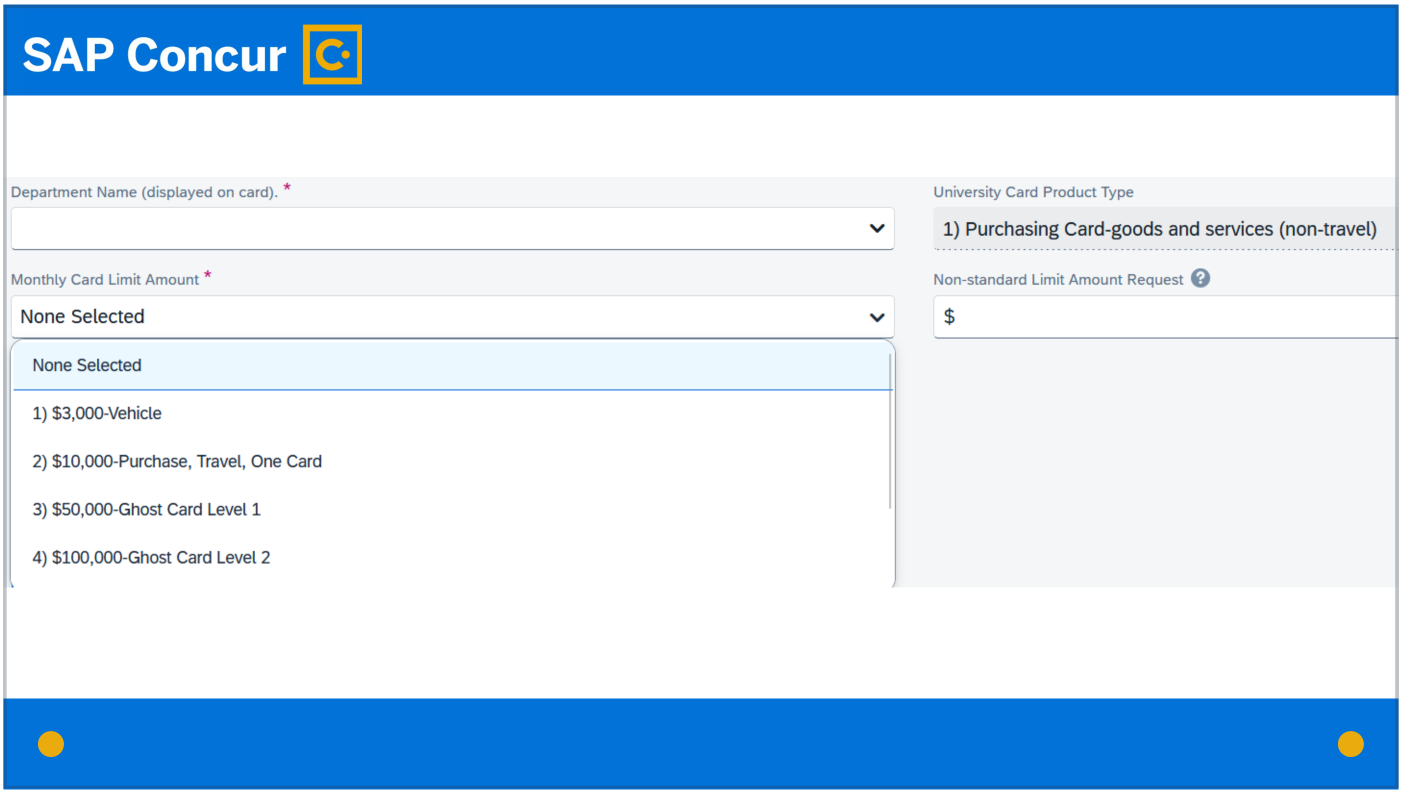
For card cancellations, the request moves from the employee to the business liaison to the card administrator.

And for all other card requests, the request moves from the employee directly to the card administrator.

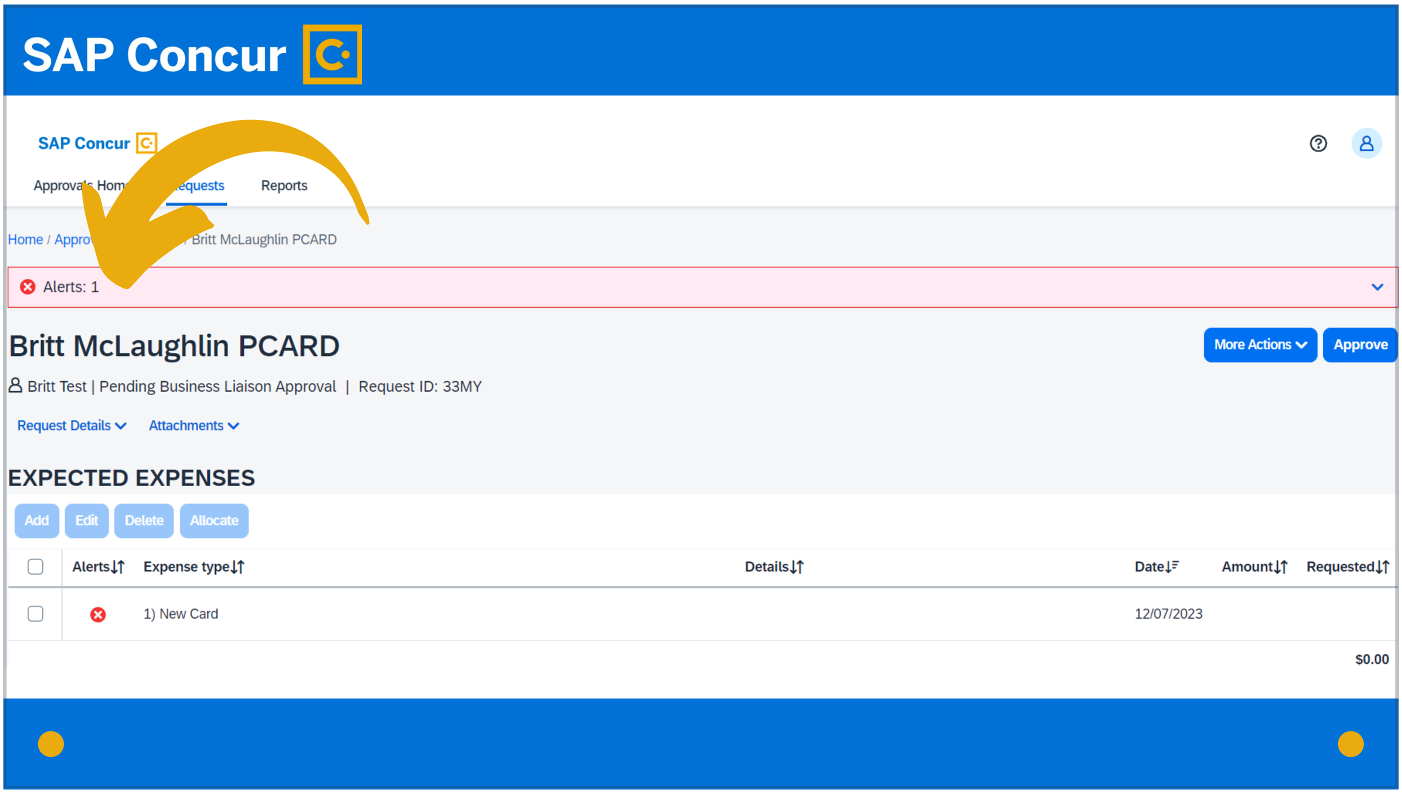


It’s important to understand next the role of each person in the workflow process.

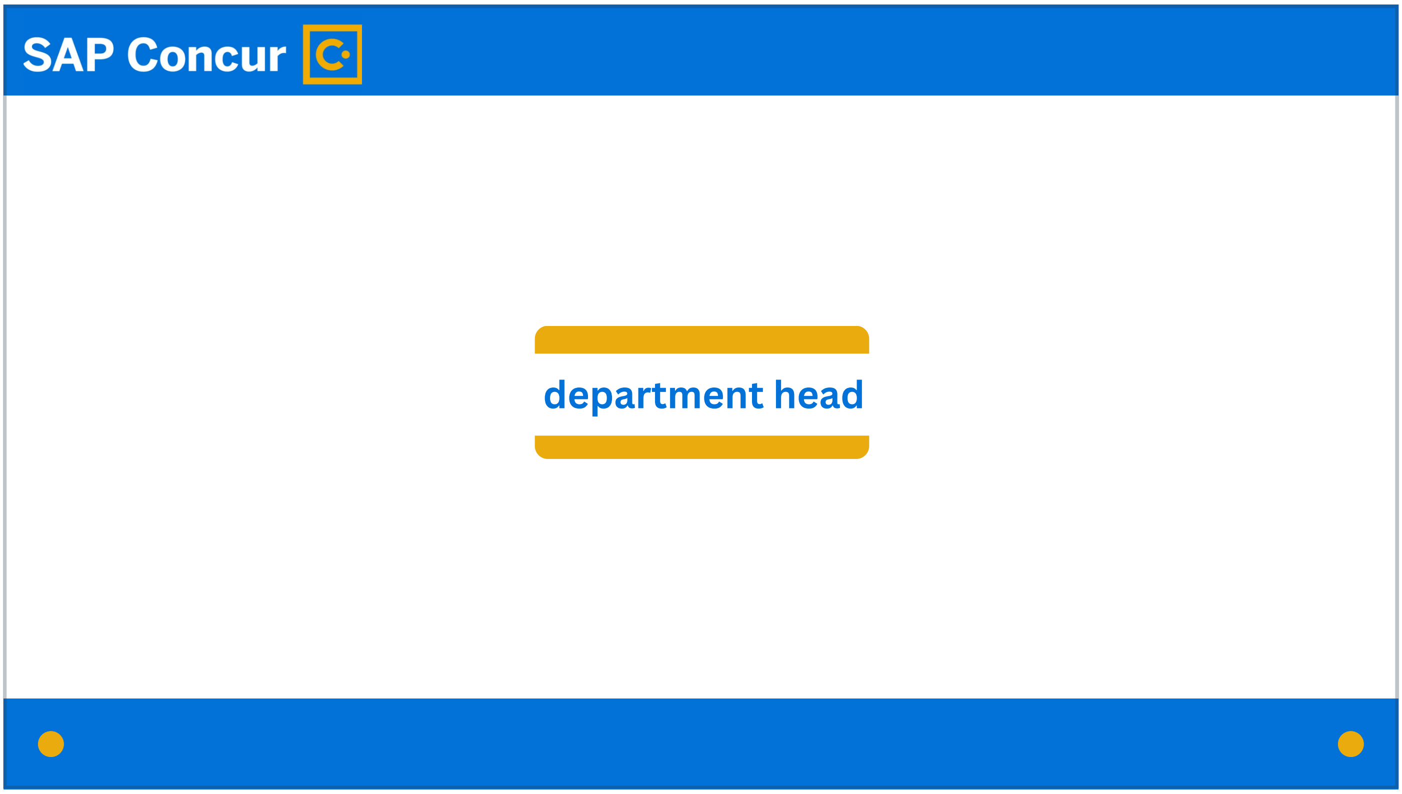
The business liaison workflow step is purposed for review. It is important at this step for the business liaison to ensure that all data within the request is correct.



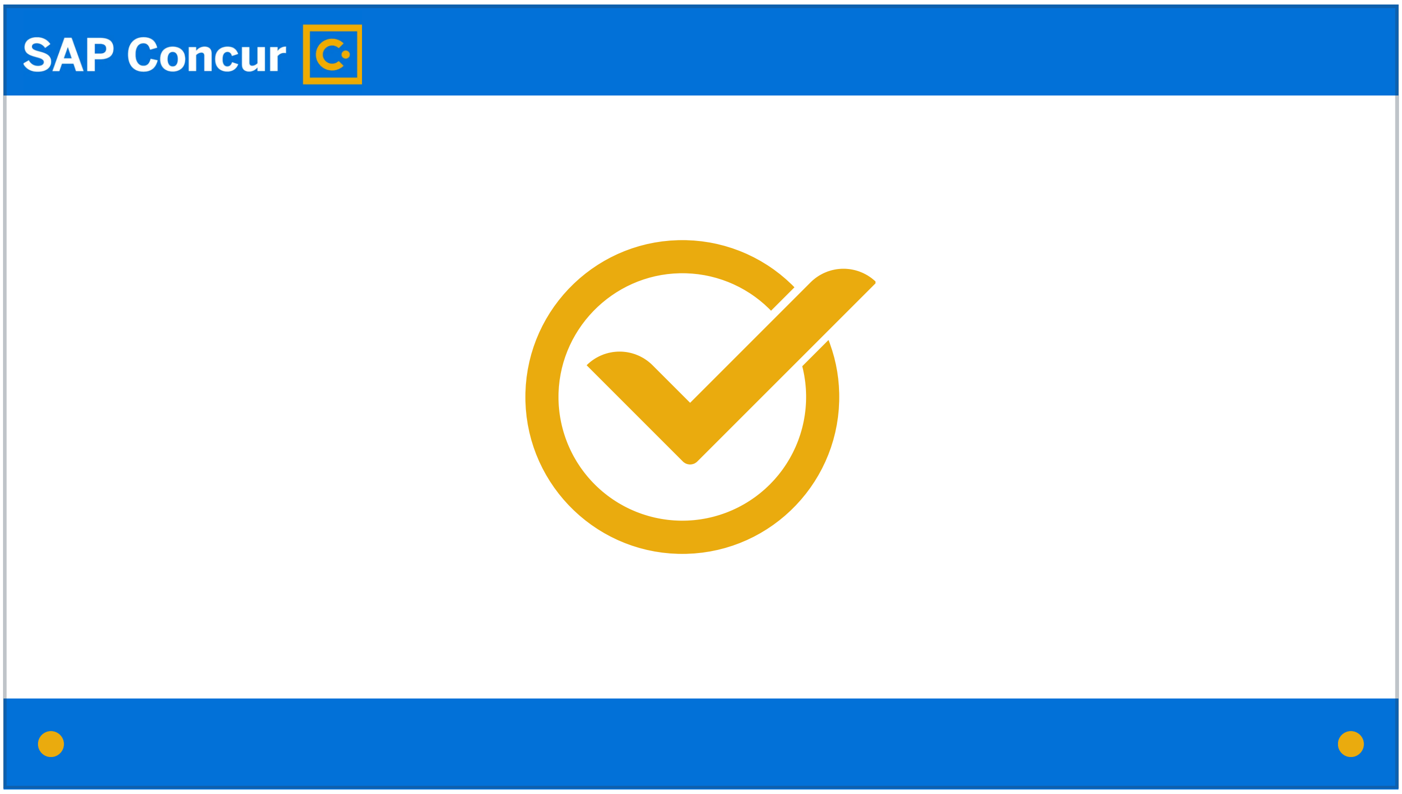
This includes confirming that the type of card requested is correct for the type of purchases that need to be made, that the monthly credit limit selected matches the card type, etc.



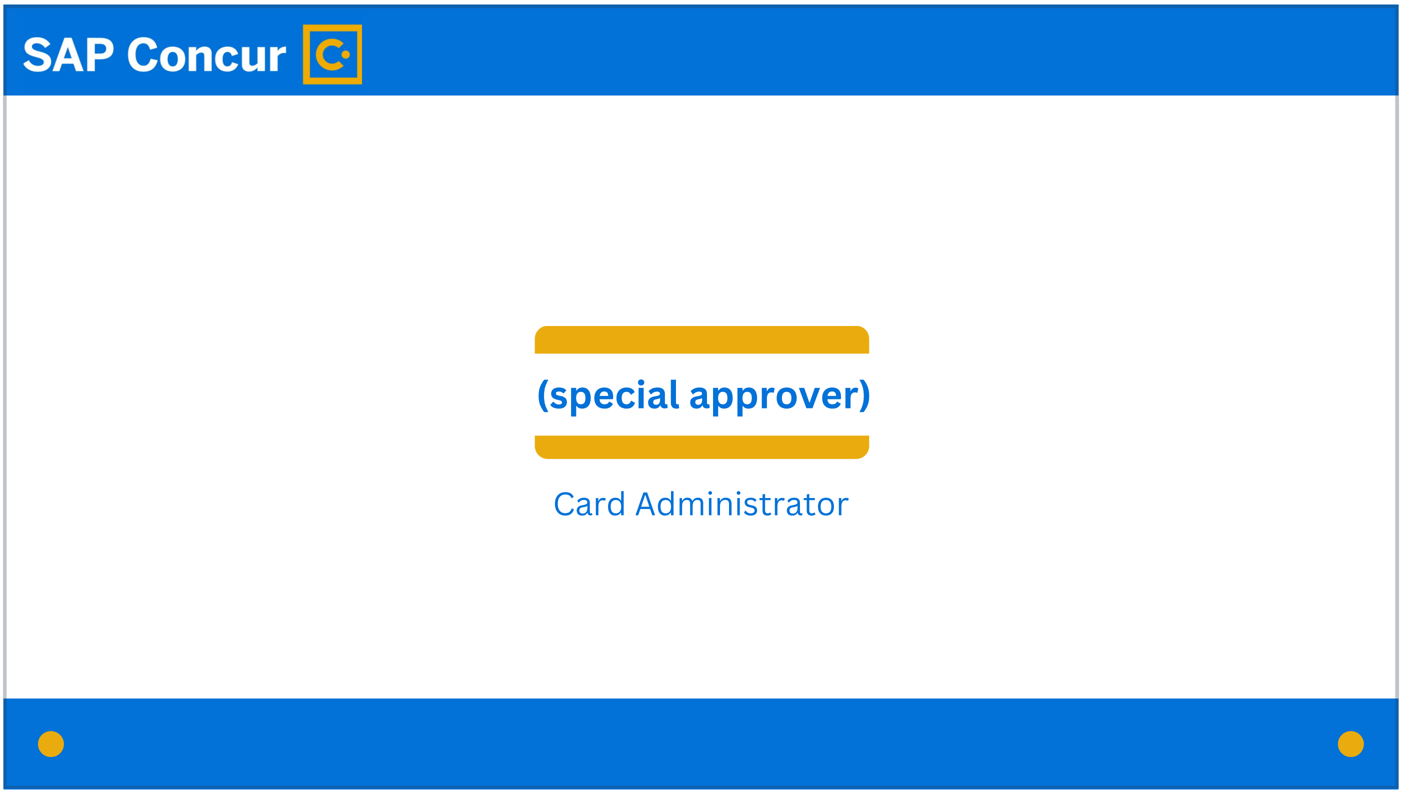
The business liaison should also ensure that any alerts or warnings on the request are resolved.



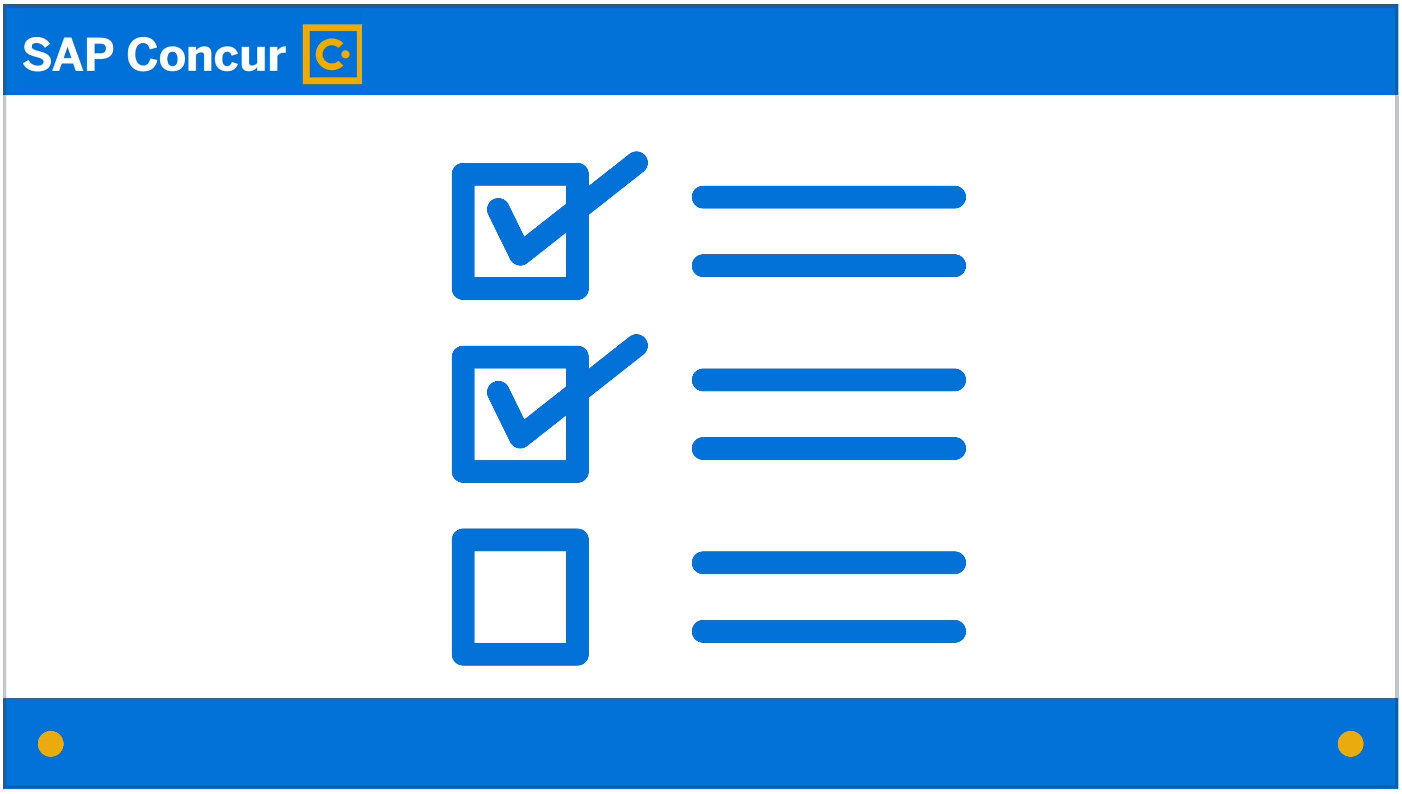
Looking next at the department head workflow step,



the department head is responsible on new card requests and on permanent limit change requests for ensuring that the request is approved at the department level.



The last person in the workflow is the card administrator—who reviews requests for university credit cards to order new cards or make changes to existing cards as needed.



who reviews requests for university credit cards to order new cards and make changes to existing cards as needed.

As with other requests and reports in the workflow, it is important to remember that, if the card request gets sent back to the employee at any point in the approval process, the entire workflow must start over.