

# Card Requests: **Creating Card Requests**

Welcome to our training on creating card requests in Concur.



A card request must be submitted and approved for each type of university credit card an employee is applying for.

1) New Card

In addition to requests for new cards, the card request should also be used to request changes to existing cards,

- 1) New Card
- 2) Close/Cancel Card

including closing the card,

- 1) New Card
- 2) Close/Cancel Card
- 3) Limit Increase/Decrease

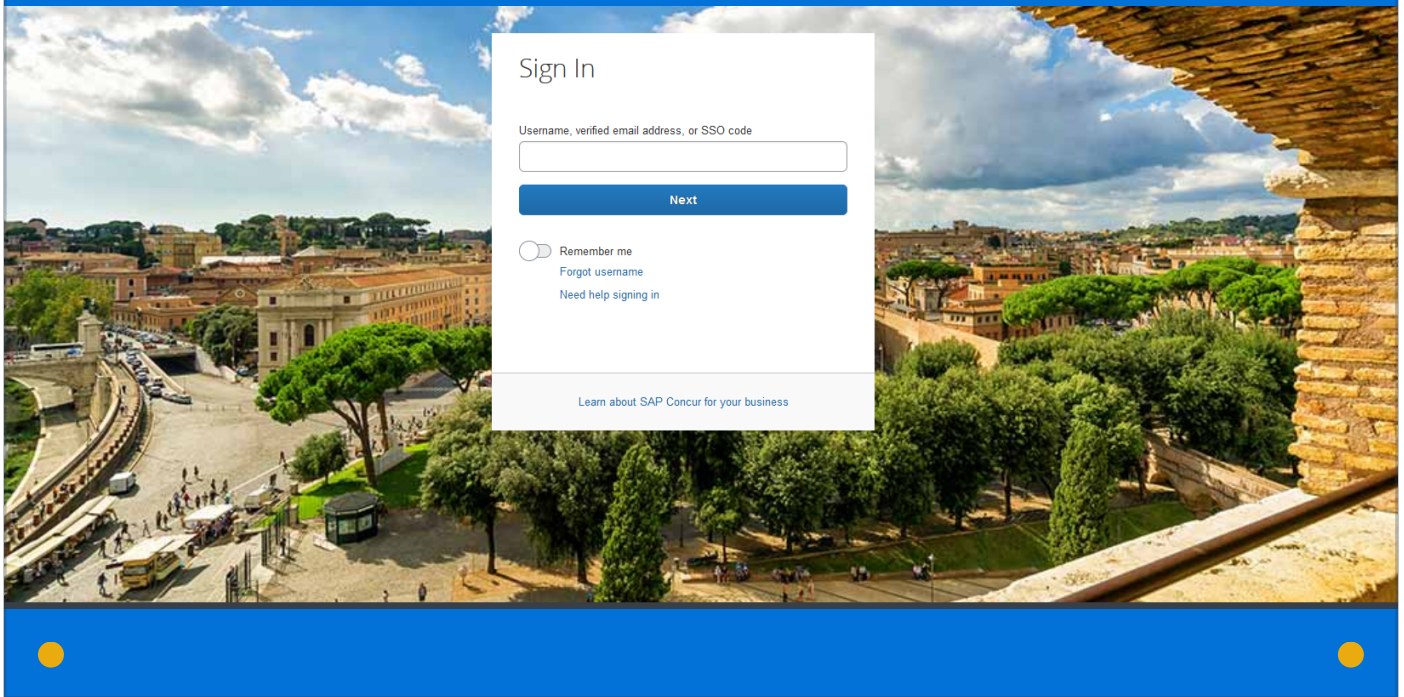
changing the credit limit associated with the card,

- 1) New Card
- 2) Close/Cancel Card
- 3) Limit Increase/Decrease
- 4) Reissue/Replace Existing Card

reissuing an existing card

- 1) New Card
- 2) Close/Cancel Card
- 3) Limit Increase/Decrease
- 4) Reissue/Replace Existing Card
- 5) Update Name

or updating the name on the card due to legal name changes or—in the case of vehicle cards—changes in the person identified as responsible for the card.



To begin the process of completing a card request, log in to Concur.





+  
Start a  
Request

+  
Start a  
Report

02  
Required  
Approvals

00  
Authorization  
Requests

00  
Available  
Expenses

00  
Open  
Reports

## Company Notes

[Deployment Toolkit](#)

You can access the deployment toolkit using this link .

[Concur Training Toolkit](#)

This link will provide information to utilize the Concur Expense System.

## My Tasks

**02** Required Approvals →

Nick T. | Europe Travel Request  
\$3,000.00 — Travel

Stacy T. | Red Stapler  
\$15.00 — Expense

**00** Available Expenses →

You currently have no available expenses.



**00** Open Reports →

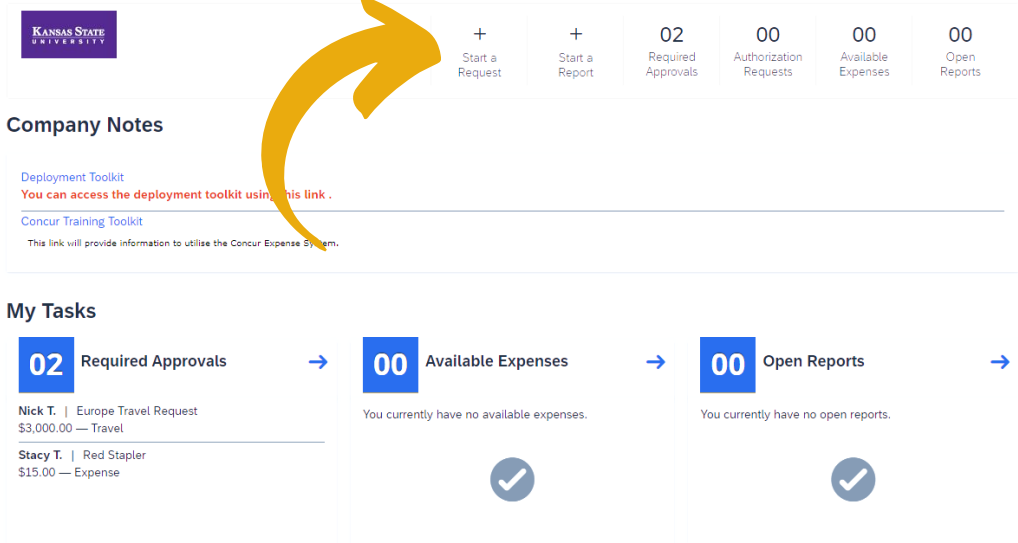
You currently have no open reports.



The log-in process takes you to your personal profile. If you are the employee requesting the card, this is the profile you want to use.

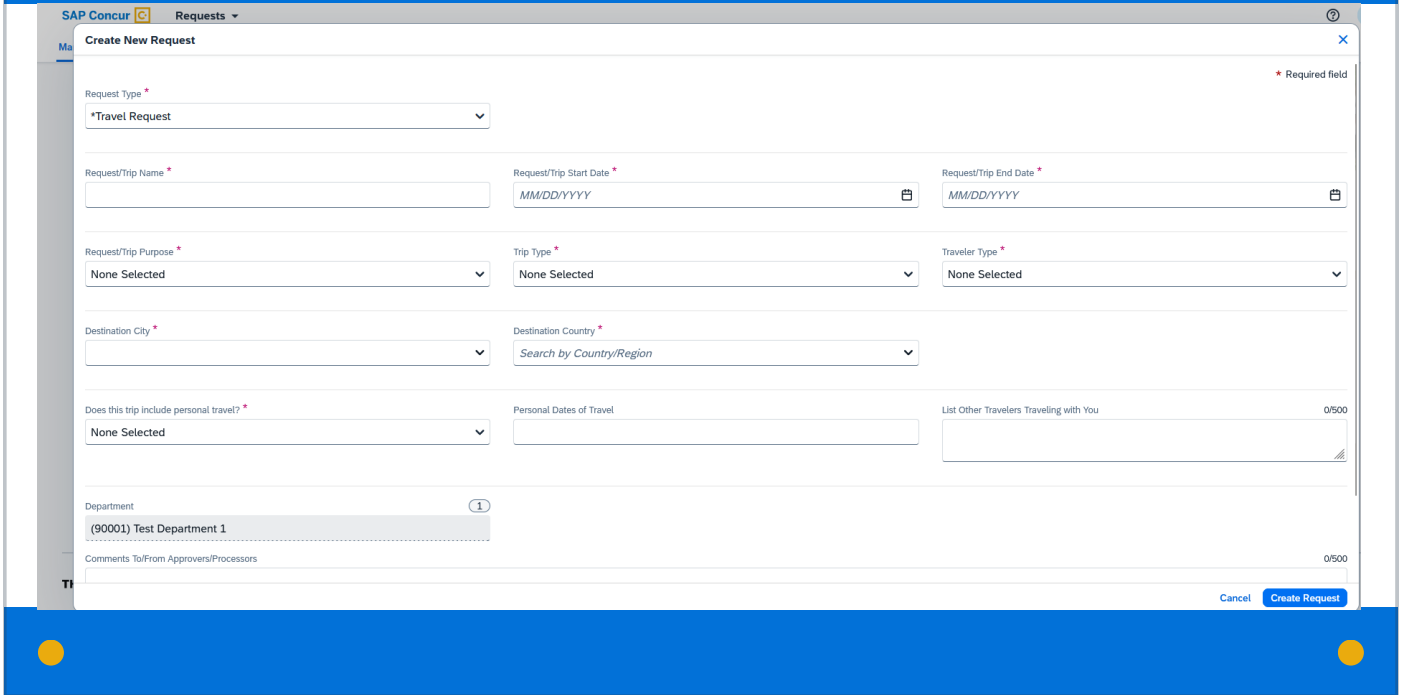


If you are a delegate acting on behalf of the employee, you want to switch to that employee's profile. For instructions on how to do this, please refer to our Delegates training video.



The screenshot shows the SAP Concur dashboard for Kansas State University. At the top right, there is a navigation bar with buttons for '+ Start a Request', '+ Start a Report', '02 Required Approvals', '00 Authorization Requests', '00 Available Expenses', and '00 Open Reports'. A large yellow arrow points from the 'Start a Request' button down to the 'My Tasks' section. Below the navigation bar is the 'Company Notes' section, which includes links for 'Deployment Toolkit' and 'Concur Training Toolkit'. The 'My Tasks' section is divided into three columns: '02 Required Approvals' (listing two requests), '00 Available Expenses' (with a checkmark), and '00 Open Reports' (with a checkmark).

Click on Start a Request.

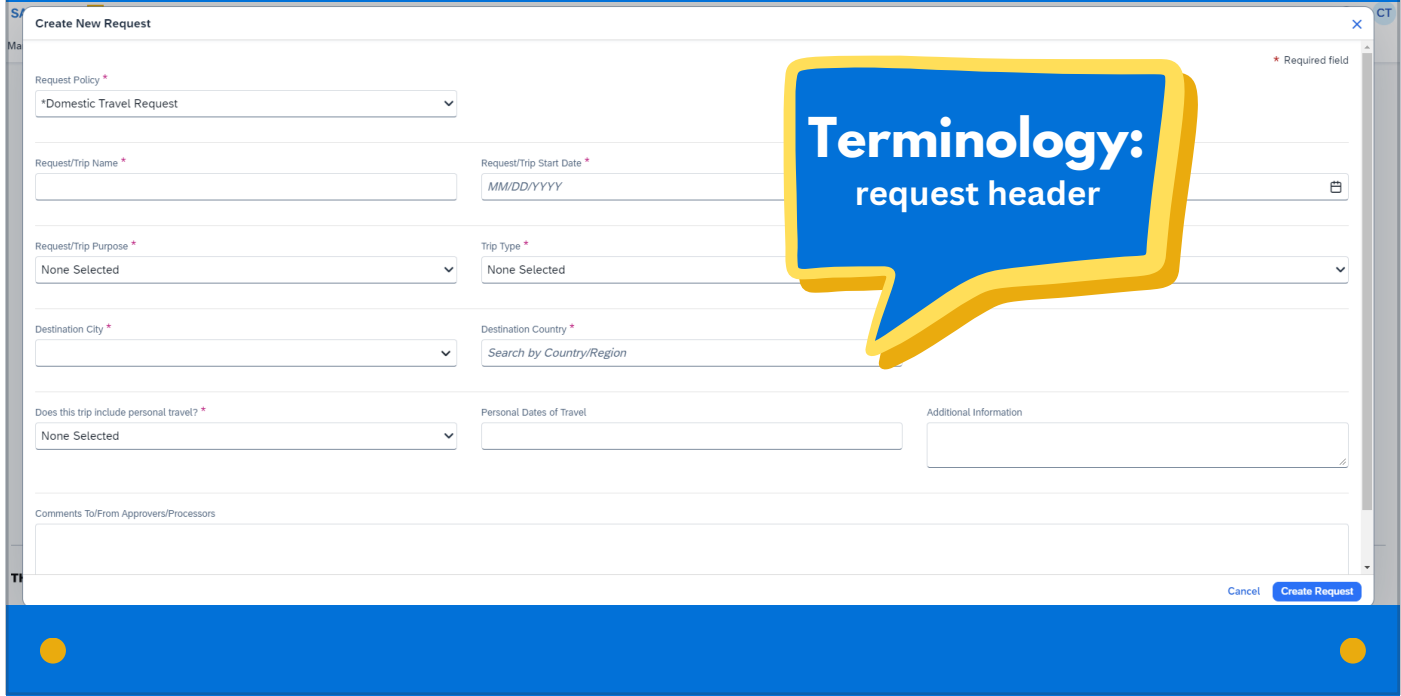


The screenshot shows the 'Create New Request' form in SAP Concur. The form is titled 'Create New Request' and has a close button (X) in the top right corner. It contains several required fields, indicated by a red asterisk (\*). The fields are:

- Request Type \***: A dropdown menu with 'Travel Request' selected.
- Request/Trip Name \***: A text input field.
- Request/Trip Start Date \***: A date input field with a calendar icon, showing the format MM/DD/YYYY.
- Request/Trip End Date \***: A date input field with a calendar icon, showing the format MM/DD/YYYY.
- Request/Trip Purpose \***: A dropdown menu with 'None Selected' selected.
- Trip Type \***: A dropdown menu with 'None Selected' selected.
- Traveler Type \***: A dropdown menu with 'None Selected' selected.
- Destination City \***: A dropdown menu with 'None Selected' selected.
- Destination Country \***: A dropdown menu with 'Search by Country/Region' selected.
- Does this trip include personal travel? \***: A dropdown menu with 'None Selected' selected.
- Personal Dates of Travel**: A text input field.
- List Other Travelers Traveling with You**: A text input field with a character limit of 0/500.
- Department**: A dropdown menu with '(90001) Test Department 1' selected and a count of 1.
- Comments To/From Approvals/Processors**: A text input field with a character limit of 0/500.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Create Request'.

You will see a screen that looks like this.



The screenshot shows the 'Create New Request' form in SAP Concur. The form includes several required fields marked with an asterisk: Request Policy (set to 'Domestic Travel Request'), Request/Trip Name, Request/Trip Start Date (format MM/DD/YYYY), Request/Trip Purpose (set to 'None Selected'), Trip Type (set to 'None Selected'), Destination City, Destination Country (with a search prompt 'Search by Country/Region'), and 'Does this trip include personal travel?' (set to 'None Selected'). There are also fields for 'Personal Dates of Travel' and 'Additional Information'. A 'Comments To/From Approvers/Processors' section is at the bottom. A blue callout box with a yellow border points to the top section of the form, containing the text 'Terminology: request header'. The form has 'Cancel' and 'Create Request' buttons at the bottom right.

Concur refers to the details on this screen as the request header.

## September Conference \$391.48

Pending Travel Request for Approval | Request ID: 336K

[Request Details](#) ▾ [Print/Share](#) ▾ [Attachments](#) ▾

- Request**
- Request Header
- Request Timeline
- Audit Trail

### EXPENSES

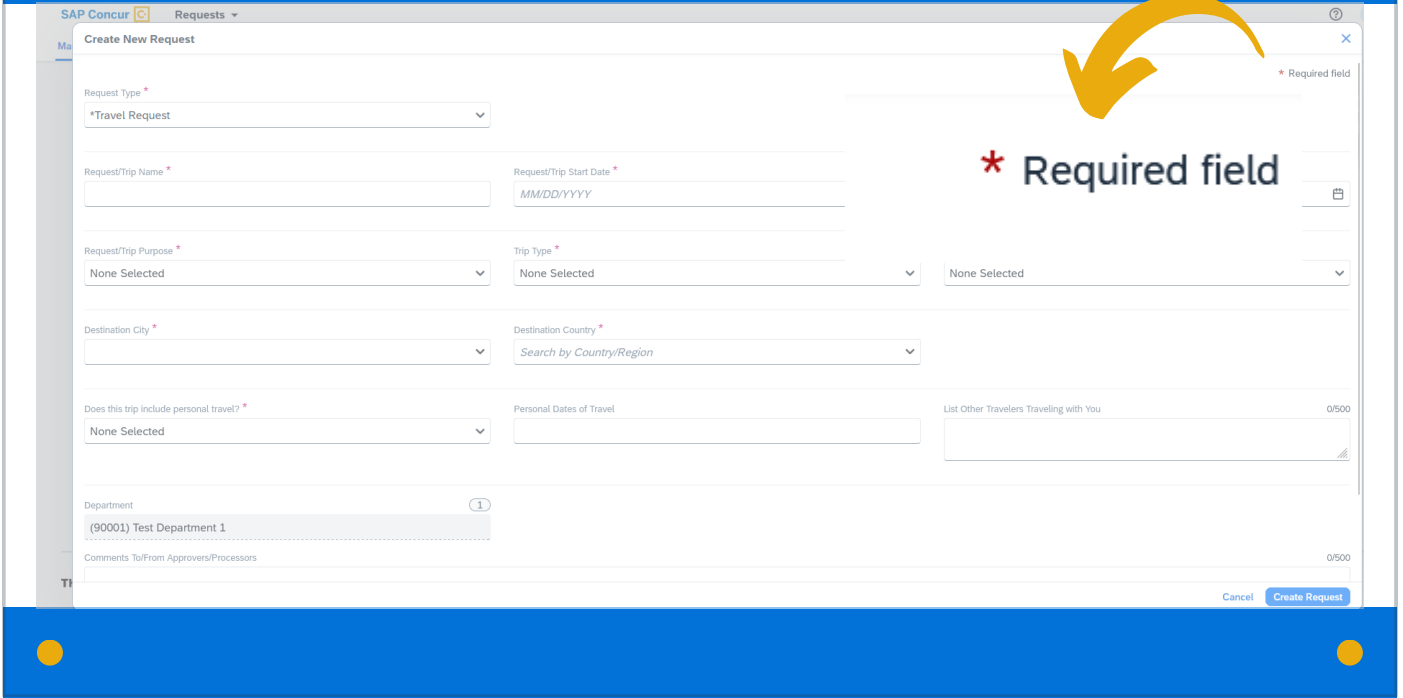
[Details](#) ↓↑

[Travel & Conference Registration](#)

[Personal Car Mileage](#)

Manhattan, KS, USA - El Dorado, KS 67042, USA

You can always get back to the request header screen to view or edit it under the Request Details dropdown menu.

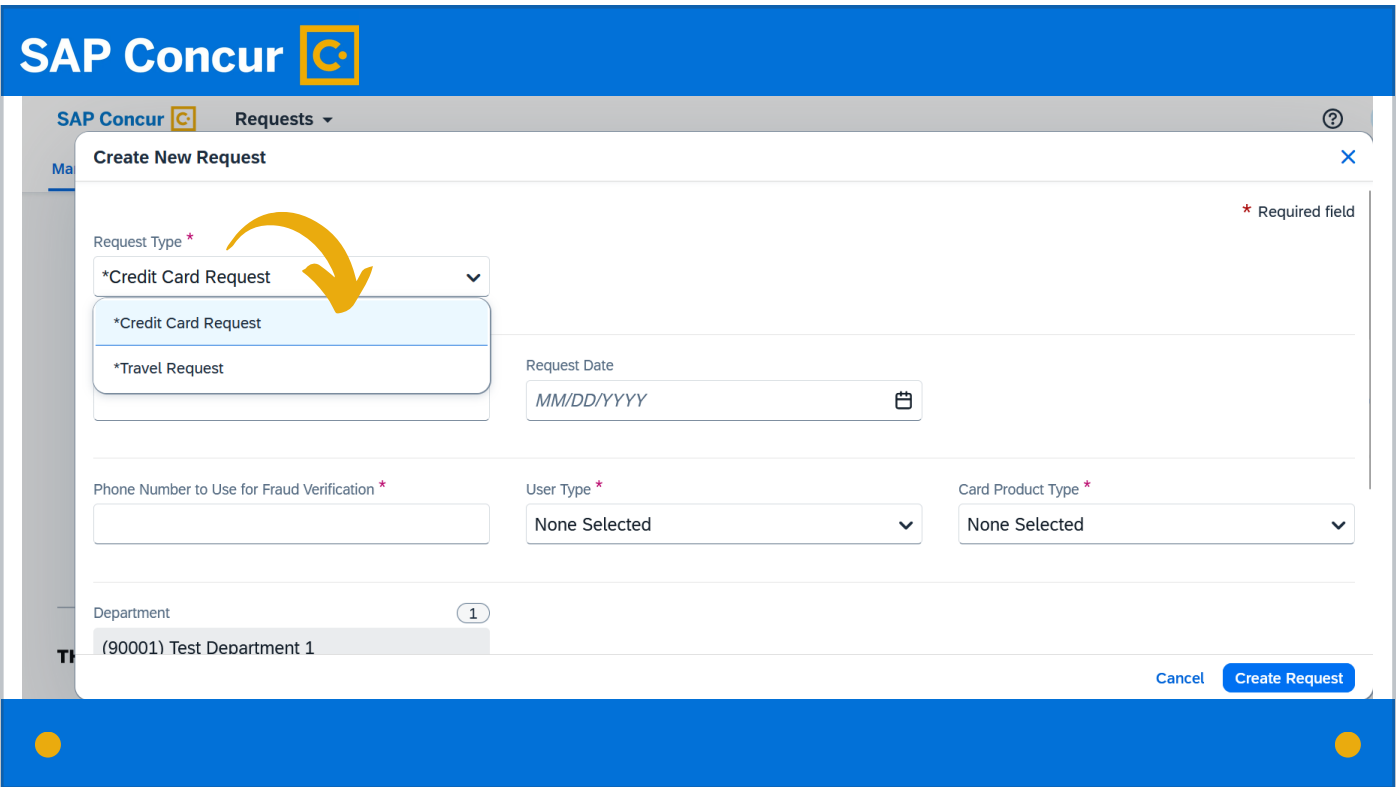


The screenshot shows the 'Create New Request' form in SAP Concur. The form contains several fields, each marked with a red asterisk to indicate it is a required field. A yellow callout box with a red asterisk and the text '\* Required field' is positioned over the top right of the form, with a yellow arrow pointing to the asterisks on the 'Request Type' field. The form fields include:

- Request Type \* (Dropdown menu, selected: \*Travel Request)
- Request/Trip Name \* (Text input)
- Request/Trip Start Date \* (Date input, format: MM/DD/YYYY)
- Request/Trip Purpose \* (Dropdown menu, selected: None Selected)
- Trip Type \* (Dropdown menu, selected: None Selected)
- Destination City \* (Dropdown menu)
- Destination Country \* (Dropdown menu, selected: Search by Country/Region)
- Does this trip include personal travel? \* (Dropdown menu, selected: None Selected)
- Personal Dates of Travel (Text input)
- List Other Travelers Traveling with You (Text input, character limit: 0/500)
- Department (Dropdown menu, selected: (90001) Test Department 1)
- Comments To/From Approvers/Processors (Text input, character limit: 0/500)

At the bottom right of the form, there are 'Cancel' and 'Create Request' buttons.

All fields on the header marked with a red asterisk are required fields and must be filled out.



The first field is for the Request Type—in this case, credit card request.



## Create New Request

\* Required field

Request Type \*

\*Credit Card Request

Request Name \*

Request Date

MM/DD/YYYY 

Phone Number to Use for Fraud Verification \*

User Type \*

None Selected

Card Product Type \*

None Selected

Department

(90001) Test Department 1

Cancel

Create Request

In the Request Name field, include the cardholder's name and the explanation of what the request is for,

Create New Request ✕

\* Required field

Request Type \*

\*Credit Card Request ▾



Request Name \*

**Willie Wildcat Card Request**

Request Date

MM/DD/YYYY 

Phone Number to Use for Fraud Verification \*

User Type \*

None Selected ▾

Card Product Type \*

None Selected ▾

Department

(90001) Test Department 1 1

Cancel

Create Request

for example, Willie Wildcat New Card Request

## Create New Request

\* Required field

Request Type \*

\*Credit Card Request

Request Name \*

**Willie Wildcat Limit Change**

Request Date

MM/DD/YYYY

Phone Number to Use for Fraud Verification \*

User Type \*

None Selected

Card Product Type \*

None Selected

Department

(90001) Test Department 1

Cancel

Create Request

or Willie Wildcat Limit Change, etc.

## Create New Request

\* Required field

Request Type \*

\*Credit Card Request

Request Name \*

cell phone number

Request Date

MM/DD/YYYY

Phone Number to Use for Fraud Verification \*

User Type \*

None Selected

Card Product Type \*

None Selected

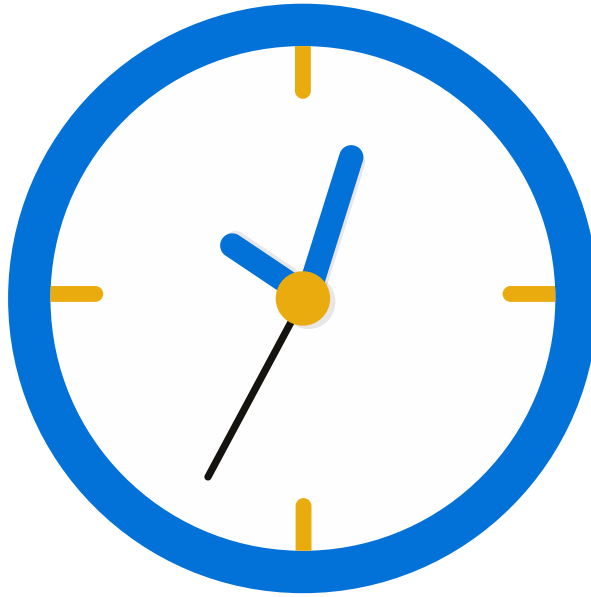
Department

(90001) Test Department 1

Cancel

Create Request

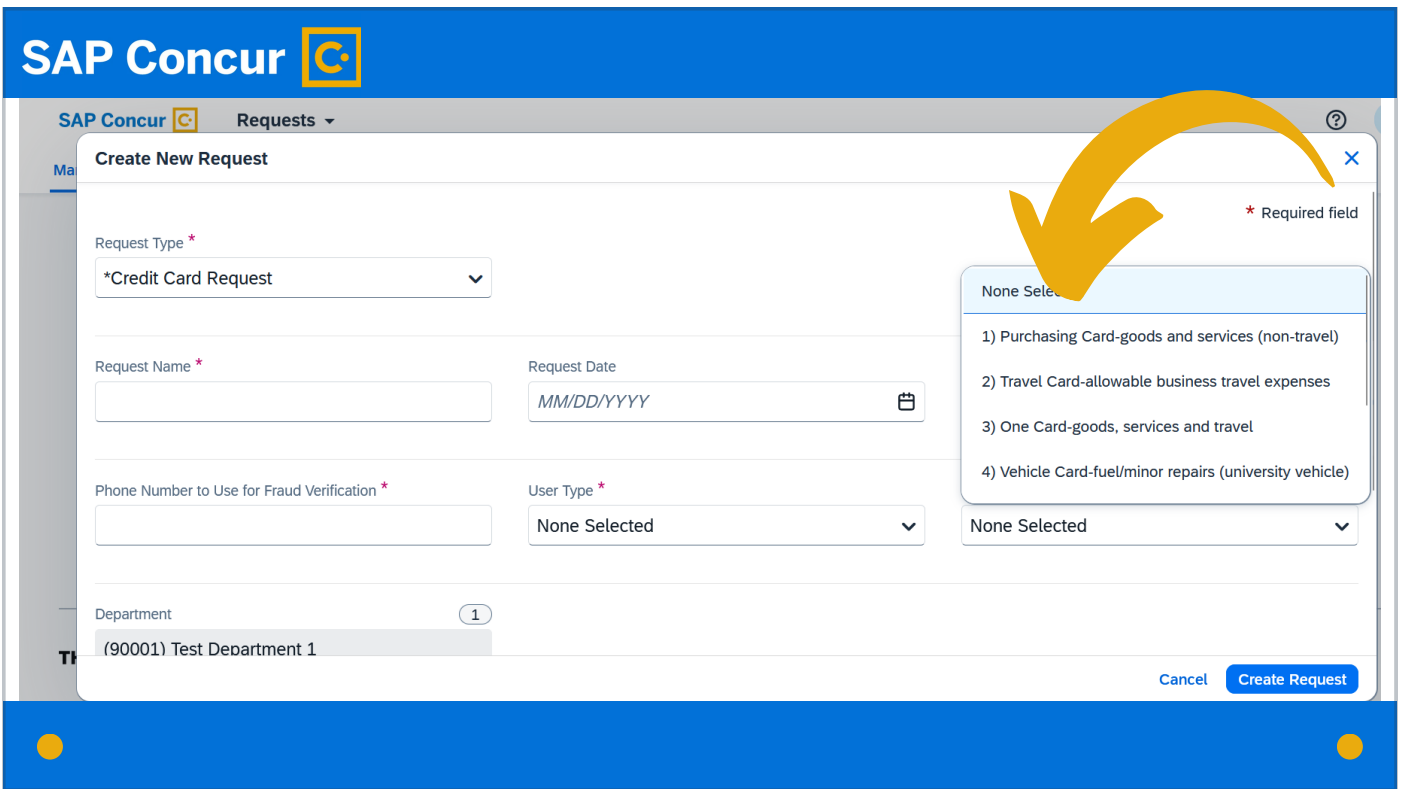
For the Phone Number to Use for Fraud field, it is recommended to use the cardholder's cell phone number.




This should be a phone number the bank can use to reach the cardholder at any time— including after business hours—



to alert the cardholder of charges flagged as suspected fraud. If the bank is unable to reach the cardholder, a hold may be placed on the card that prevents the charges from going through.



On the Card Product Type field of the Request Header screen, select the type of the card the employee is requesting. For details on the different card types available and which should be selected, please refer to our Card Product Types training video.


SAP Concur  Requests ▾ ?

**Create New Request** ✕

\* Required field

Request Type \*  
\*Credit Card Request ▾

Request Name \*

Request Date  

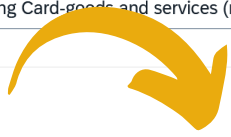
Phone Number to Use for Fraud Verification \*

User Type \*  
None Selected ▾

Card Product Type \*  
1) Purchasing Card-goods and services (n... ▾

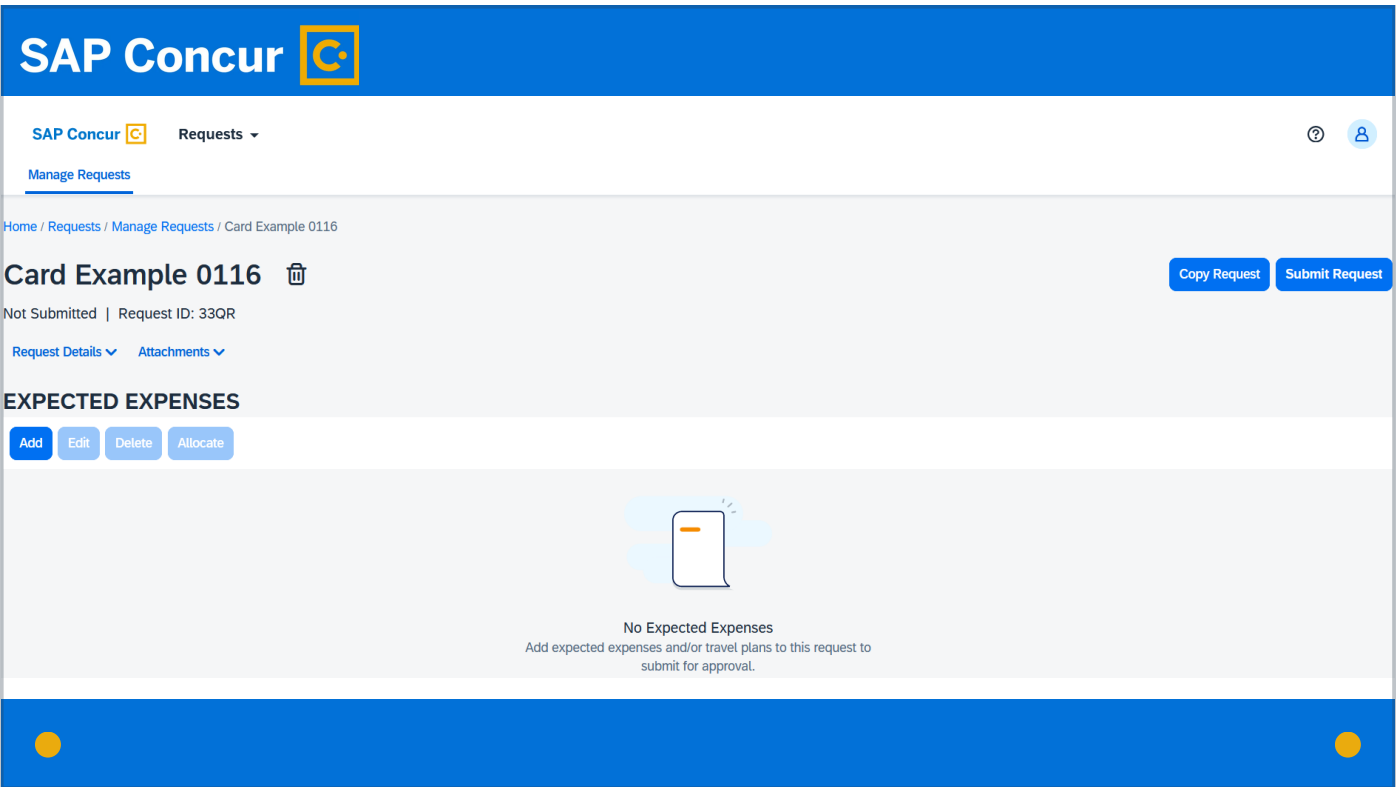
Department 1  
(90001) Test Department 1

Cancel Create Request

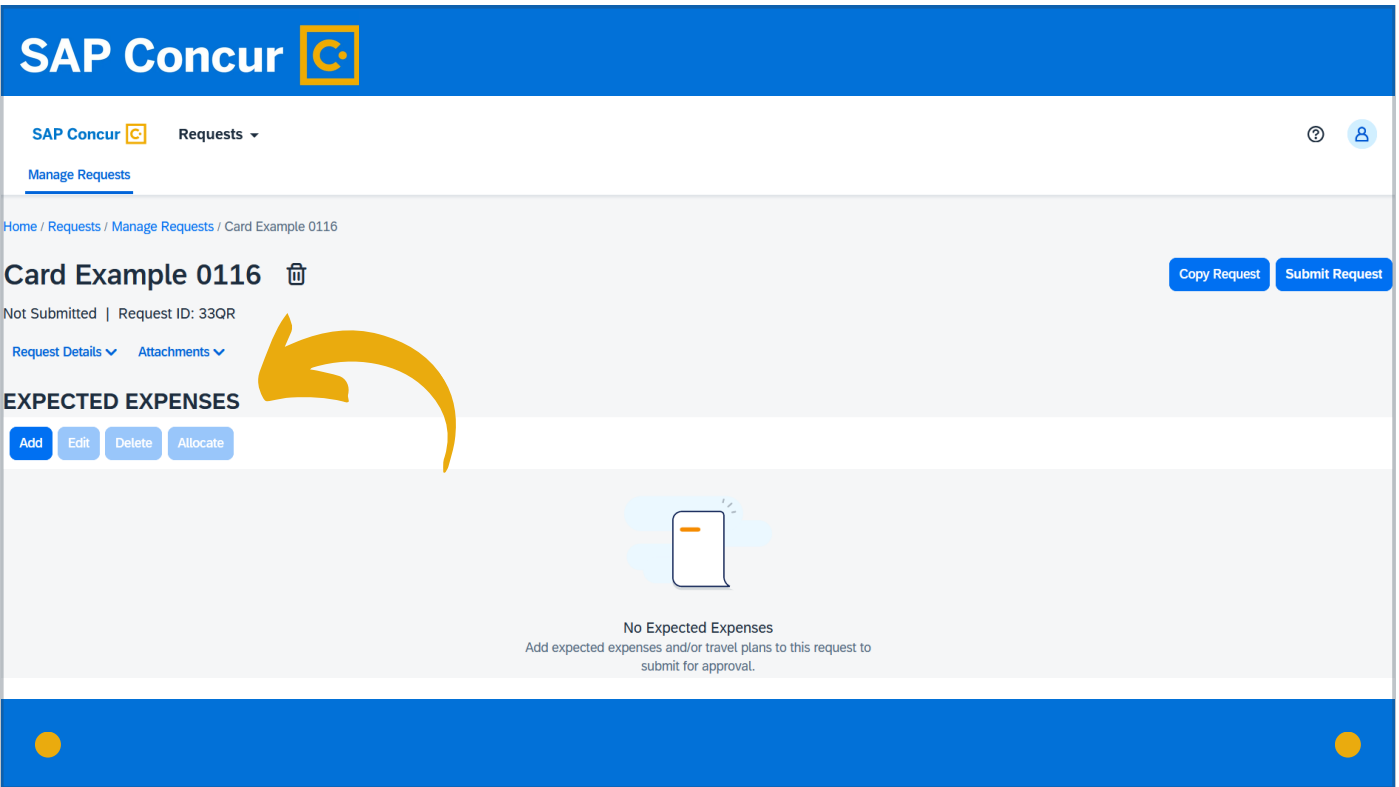


Once you've selected the card product type and all other required and applicable fields are complete, click the Create Request button in the bottom right corner.





A new screen will appear that will allow you to manage the request.



The screen will refer to Expected Expenses because of Concur's prototype request set-up. For our purposes with the card request, we are not adding expenses but adding card request details.

## Card Example 0116

[Copy Request](#)

[Submit Request](#)

Not Submitted | Request ID: 33QR

[Request Details](#) ▾

[Attachments](#) ▾

### EXPECTED EXPENSES

[Add](#)

[Edit](#)

[Delete](#)

[Allocate](#)



No Expected Expenses

Add expected expenses and/or travel plans to this request to submit for approval.

To do this, click the Add button.

## Card Example 0116

Not Submitted | Request ID: 33QR

[Request Details](#) ▾ [Attachments](#) ▾

### EXPECTED EXPENSES

Add

Edit

Delete

Allocate

*Search for an expense type*

- 1) New Card
- 2) Close/Cancel Card
- 3) Limit Increase/Decrease
- 4) Reissue/Replace Existing Card
- 5) Update Name



From the list that appears, select the reason for the card request.

## New Expense: 1) New Card

01/16/2024

Cancel **Save**

Card Holder First Name \*

Card Holder Last Name \*


Department Name (displayed on card). \*

University Card Product Type

1) Purchasing Card-goods and services (non-travel)

Monthly Card Limit Amount \*

None Selected ▾

Non-standard Limit Amount Request 

\$

Comment 0/2000


**Save** Cancel


Fill out all required fields, marked with the red asterisk.

## New Expense: 1) New Card


02/09/2024


Cancel **Save**

Card Holder First Name *	Card Holder Last Name *
<input type="text"/>	<input type="text"/>
Department Name (displayed on card) *	University Card Product Type
<input type="text"/>	1) Purchasing Card-goods and services (non-travel)
Monthly Card Limit Amount *	Non-standard Limit Amount Request 
None Selected	\$
<div style="border: 1px solid #ccc; padding: 5px;"><p>None Selected</p><p>1) \$3,000-Vehicle</p><p>2) \$10,000-Purchase, Travel, One Card</p><p>3) \$50,000-Ghost Card Level 1</p><p>4) \$100,000-Ghost Card Level 2</p></div>	



For the Monthly Card Limit Amount field, select the limit that applies to the card type you are requesting.

**SAP Concur** 

SAP Concur  Requests ▾ ? TT

Manage Requests

Home / Requests / Manage Requests / Card Example 0209 / New Expense: 1) New Card

### New Expense: 1) New Card

02/09/2024 Cancel Save

Card Holder First Name \*

Card Holder Last Name \*

Department Name (displayed on card) \*

University Card Product Type

1) Purchasing Card-goods and services (non-travel)

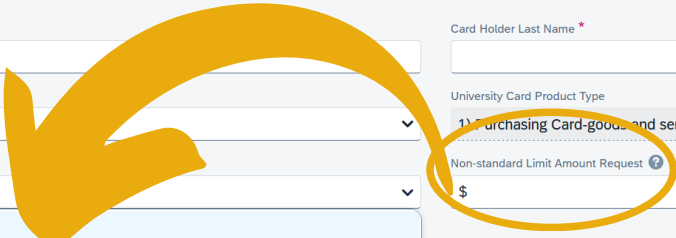
Monthly Card Limit Amount \*

None Selected


Non-standard Limit Amount Request ?



\$

- 1) \$3,000-Vehicle
- 2) \$10,000-Purchase, Travel, One Card
- 3) \$50,000-Ghost Card Level 1
- 4) \$100,000-Ghost Card Level 2



Even if you are requesting a non-standard limit, for the Monthly Card Limit Amount field still select the option that applies to the applicable card type.

**SAP Concur** 

SAP Concur  Requests 

Manage Requests

Home / Requests / Manage Requests / Card Example 0116 / New Expense: 1) New Card

### New Expense: 1) New Card

01/16/2024 Cancel Save


Card Holder First Name \*  
Test

Card Holder Last Name \*  
Cardholder

Department Name (displayed on card) \*  
DFS

University Card Product Type  
1) Purchasing Goods and services (non-travel)

Monthly Card Limit Amount \*  
2) \$10,000-Purchase, Travel, One Card

Non-standard Limit Amount Request   
\$ 15,000.00

Comment 0/2000

Save Cancel

Then fill in the non-standard amount, so that both fields are complete.



## New Expense: 1) New Card

02/09/2024

Cancel **Save**

Card Holder First Name \*

Card Holder Last Name \*

Department Name (displayed on card). \*

University Card Product Type

1) Purchasing Card-goods and services (non-travel)

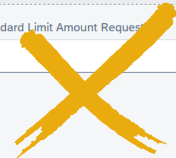
Monthly Card Limit Amount \*

None Selected


- None Selected
- 1) \$3,000-Vehicle
- 2) \$10,000-Purchase, Travel, One Card
- 3) \$50,000-Ghost Card Level 1
- 4) \$100,000-Ghost Card Level 2



Non-standard Limit Amount Request

\$



If you are not requesting a non-standard amount, it is important to leave this field blank

**SAP Concur** 

SAP Concur  Requests ▾ ? 

[Manage Requests](#)

Home / Requests / Manage Requests / Card Example 0116 / New Expense: 1) New Card

## New Expense: 1) New Card

01/16/2024 Cancel Save

Card Holder First Name \*

Card Holder Last Name \*

Department Name (displayed on card). \*


University Card Product Type

1) Purchasing Card-goods and services (non-travel)

Monthly Card Limit Amount \*  
None Selected ▾

Non-standard Limit Amount Request ⓘ  
\$

- 2) \$10,000-Purchase, Travel, One Card
- 3) \$50,000-Ghost Card Level 1
- 4) \$100,000-Ghost Card Level 2
- 5) SET Card-Please enter amount
- 6) Virtual Card-Please enter amount



unless your card request is for a SET or Virtual Card and requires the amount to be entered.

## New Expense: 1) New Card

01/16/2024

Card Holder First Name \*

Test

Card Holder Last Name \*

Cardholder

Department Name (displayed on card). \*

DFS

University Card Product Type

1) Purchasing Card-goods and services (non-travel)

Monthly Card Limit Amount \*

2) \$10,000-Purchase, Travel, One Card

Non-standard Limit Amount Request ⓘ

\$

Comment 0/2000



Cancel Save

Once all required and applicable fields are complete, click Save.

## Card Example 0116

[Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33QR

[Request Details](#) ▾ [Attachments](#) ▾

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↓↑	Amount↑↓	Requested↑↓
<input type="checkbox"/>	1) New Card		01/16/2024		\$0.00



The card request will show under the Expected Expenses list.

[Home](#) / [Requests](#) / [Manage Requests](#) / Card Example 0116

## Card Example 0116

Not Submitted | Request ID: 33QR

[Request Details](#) ▾ [Attachments](#) ▾

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type↓↑
<input checked="" type="checkbox"/>	1) New Card

If you need to edit this request, check the box to the left of it and click the Edit button.

## Card Example 0116

Not Submitted | Request ID: 33QR

[Request Details](#) ▾ [Attachments](#) ▾

[Copy Request](#)

[Submit Request](#)

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↓↕	Amount↑↓	Requested↑↓
<input type="checkbox"/>	1) New Card		01/16/2024		\$0.00

Once you are ready to submit the request, click Submit Request if you are the employee—

## Card Request by Delegate 0116

Copy Request

Notify Employee

Not Submitted | Request ID: 330T

Request Details ▾ Attachments ▾

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↓↑	Amount↑↓	Requested↑↓
<input type="checkbox"/>	1) New Card		01/16/2024		\$0.00

or, if you are the delegate for the employee, click the Notify Employee button at the top right of the screen.



This will send an email to the employee that the request is ready to be submitted.



## Card Example 0116

Not Submitted | Request ID: 33QR

[Request Details](#) ▾ [Attachments](#) ▾

### EXPECTED EXPENSES

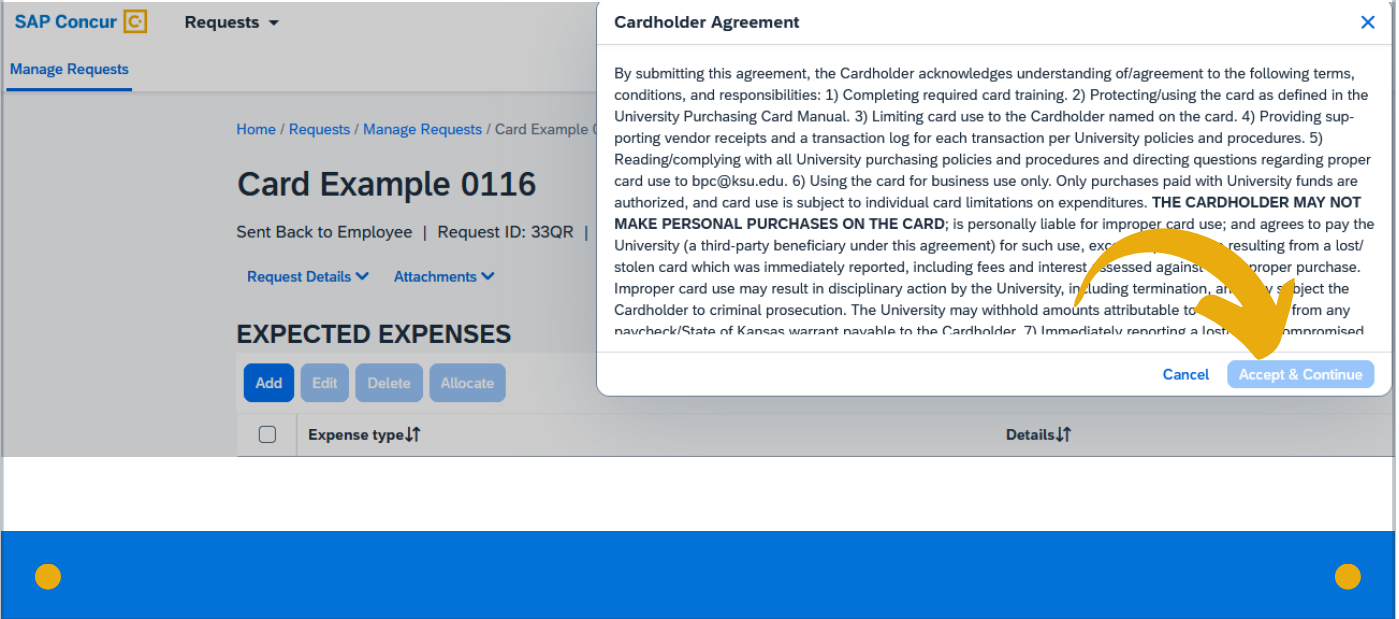
[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↓↕	Amount↑↓	Requested↑↓
<input type="checkbox"/>	1) New Card		01/16/2024		\$0.00



[Copy Request](#) [Submit Request](#)

The employee has to be the person to submit the request; delegates can create requests on behalf of the employee but are not able to submit them because the employee has to be the person to agree to the Cardholder Agreement. This Cardholder Agreement will appear once the employee clicks the Submit Request button.



The screenshot shows the SAP Concur interface. On the left, a sidebar contains 'SAP Concur' and 'Requests'. The main content area is titled 'Manage Requests' and shows a card request for 'Card Example 0116'. The card is 'Sent Back to Employee' with 'Request ID: 33QR'. Below the card title are buttons for 'Request Details' and 'Attachments'. A section titled 'EXPECTED EXPENSES' has buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. A 'Details' link is at the bottom right of the card area. A modal window titled 'Cardholder Agreement' is open on the right, displaying the terms of the agreement. A yellow arrow points from the 'Accept & Continue' button in the modal to the 'Accept & Continue' button in the screenshot.

**Cardholder Agreement**

By submitting this agreement, the Cardholder acknowledges understanding of/agreement to the following terms, conditions, and responsibilities: 1) Completing required card training. 2) Protecting/using the card as defined in the University Purchasing Card Manual. 3) Limiting card use to the Cardholder named on the card. 4) Providing supporting vendor receipts and a transaction log for each transaction per University policies and procedures. 5) Reading/complying with all University purchasing policies and procedures and directing questions regarding proper card use to [bpc@ksu.edu](mailto:bpc@ksu.edu). 6) Using the card for business use only. Only purchases paid with University funds are authorized, and card use is subject to individual card limitations on expenditures. **THE CARDHOLDER MAY NOT MAKE PERSONAL PURCHASES ON THE CARD**; is personally liable for improper card use; and agrees to pay the University (a third-party beneficiary under this agreement) for such use, expenses, and interest resulting from a lost/stolen card which was immediately reported, including fees and interest assessed against the Cardholder for improper purchase. Improper card use may result in disciplinary action by the University, including termination, and may subject the Cardholder to criminal prosecution. The University may withhold amounts attributable to the Cardholder from any paycheck/State of Kansas warrant payable to the Cardholder. 7) Immediately reporting a lost, stolen, or compromised card to the University.

Cancel Accept & Continue

If you are the employee submitting the request, read the Cardholder Agreement to make sure you agree with and are aware of all points it refers to. If for any reason you do not agree and do not wish to continue, click Cancel to prevent the card request from being submitted. Otherwise, click the Accept and Continue button.

Home / Requests / Manage Requests

## Manage Requests

### Request Library

**BM TEST International 9.29**

01/25/2024 | 334Q

**\$2,125.00**

Not Submitted

**Card Example 0116**

01/16/2024 | 33QR

**\$0.00**

Submitted

Pending Business Liaison Approval  
Test, Christa



The request is now submitted and will show in your Request Library.

Home / Requests / Manage Requests

## Manage Requests

### Request Library

**BM TEST International 9.29**

01/25/2024 | 334Q

**\$2,125.00**

Not Submitted

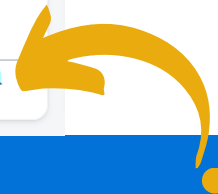
**Card Example 0116**

01/16/2024 | 33QR

**\$0.00**

Submitted

Pending Business Liaison Approval  
Test, Christa



You can see at the bottom of the request box the current status. This status will update as the request moves through the approval process.

## Manage Requests

### Request Library

**BM TEST International 9.29**

01/25/2024 | 334Q

**\$2,125.00**

Not Submitted

**Card Example 0116**

01/16/2024 | 33QR

**\$0.00**

Submitted

Pending Business Liaison Approval  
Test, Christa



Additionally, if you click on the request box

## Card Example 0116

[More Actions ▾](#) [Recall](#)

Pending Business Approval | Request ID: 33QR

[Request Details ▾](#) [Attachments ▾](#)

- Request
- Request Header
- Request Timeline**
- Audit Trail
- 1) new card

### EXPENSES

Details ⬆⬆

Date ⬆


Amount ⬆⬆

Requested ⬆⬆

01/16/2024

\$0.00

and, on the next screen, click on Request Details -> Request Timeline,

SAP Concur  Requests ▾

Request Timeline  
Card Example 0116 | \$0.00

**Approval Flow**

- Business Liaison Approval  
Test, Christa
- Department Head Approval
- Credit Card Admin Review

**Request Summary**

---

**SUBMITTED**  
Test, Traveler3 01/16/2024

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**PENDING BUSINESS LIAISON APPROVAL**  
Test, Traveler3 01/16/2024

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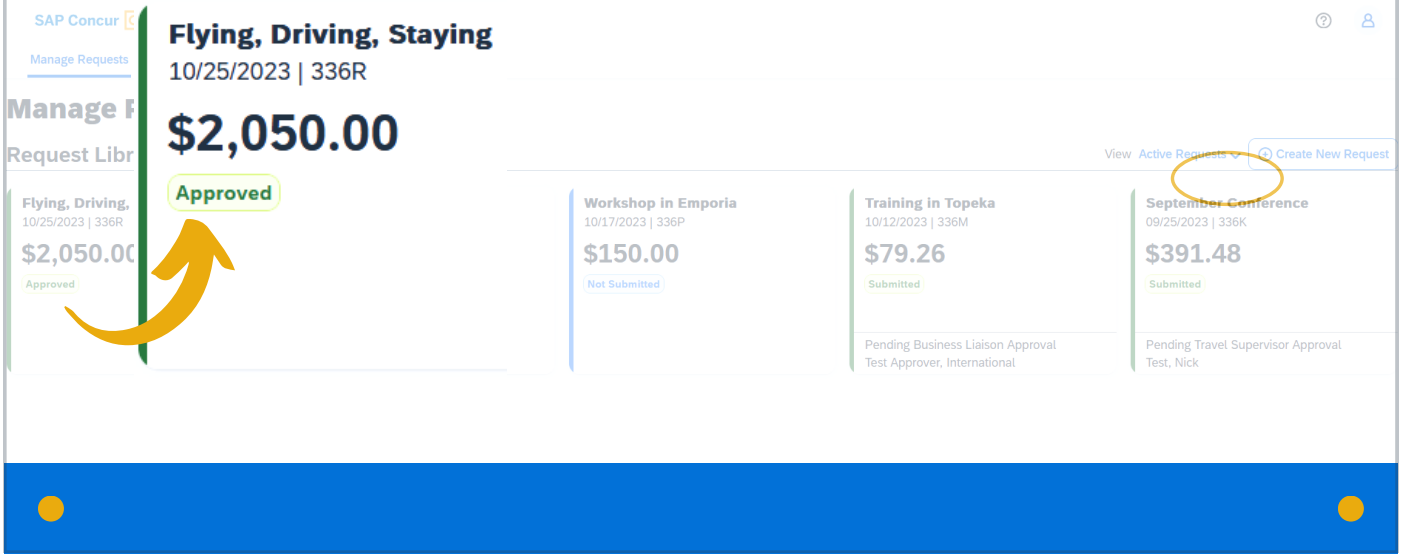
**SUBMITTED**  
Test, Traveler3 01/16/2024

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**PENDING BUSINESS LIAISON APPROVAL**  
Test, Traveler3 01/16/2024



the workflow of the request will provide details on where the request currently is in the approval process and what steps of that process remain to be completed.



The screenshot displays the SAP Concur 'Manage Requests' interface. At the top, the SAP Concur logo is visible. Below it, the page title is 'Flying, Driving, Staying' with a date of 10/25/2023 and ID 336R. A large amount of \$2,050.00 is shown, with a green 'Approved' label and a yellow arrow pointing to it. To the right, there are buttons for 'View Active Requests' and 'Create New Request'. Below these are three request cards: 'Workshop in Emporia' (\$150.00, Not Submitted), 'Training in Topeka' (\$79.26, Submitted), and 'September Conference' (\$391.48, Submitted). The 'September Conference' card has a yellow circle around the 'Submitted' label. The bottom of the page has a blue bar with two yellow dots.

Request Title	Date	ID	Amount	Status	Approval Info
Flying, Driving, Staying	10/25/2023	336R	\$2,050.00	Approved	
Workshop in Emporia	10/17/2023	336P	\$150.00	Not Submitted	
Training in Topeka	10/12/2023	336M	\$79.26	Submitted	Pending Business Liaison Approval Test Approver, International
September Conference	09/25/2023	336K	\$391.48	Submitted	Pending Travel Supervisor Approval Test, Nick

When the final approver approves the request, the status will change to Approved.