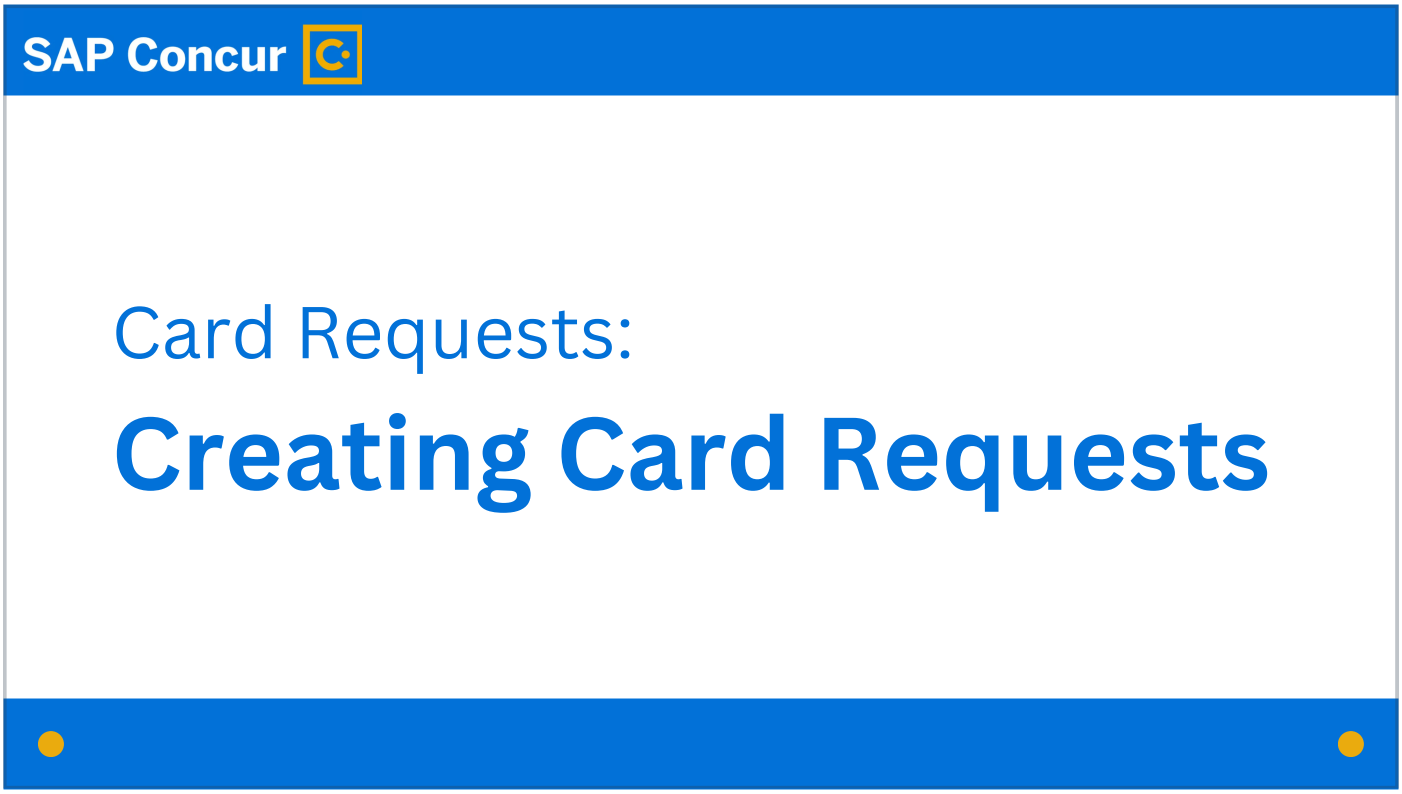
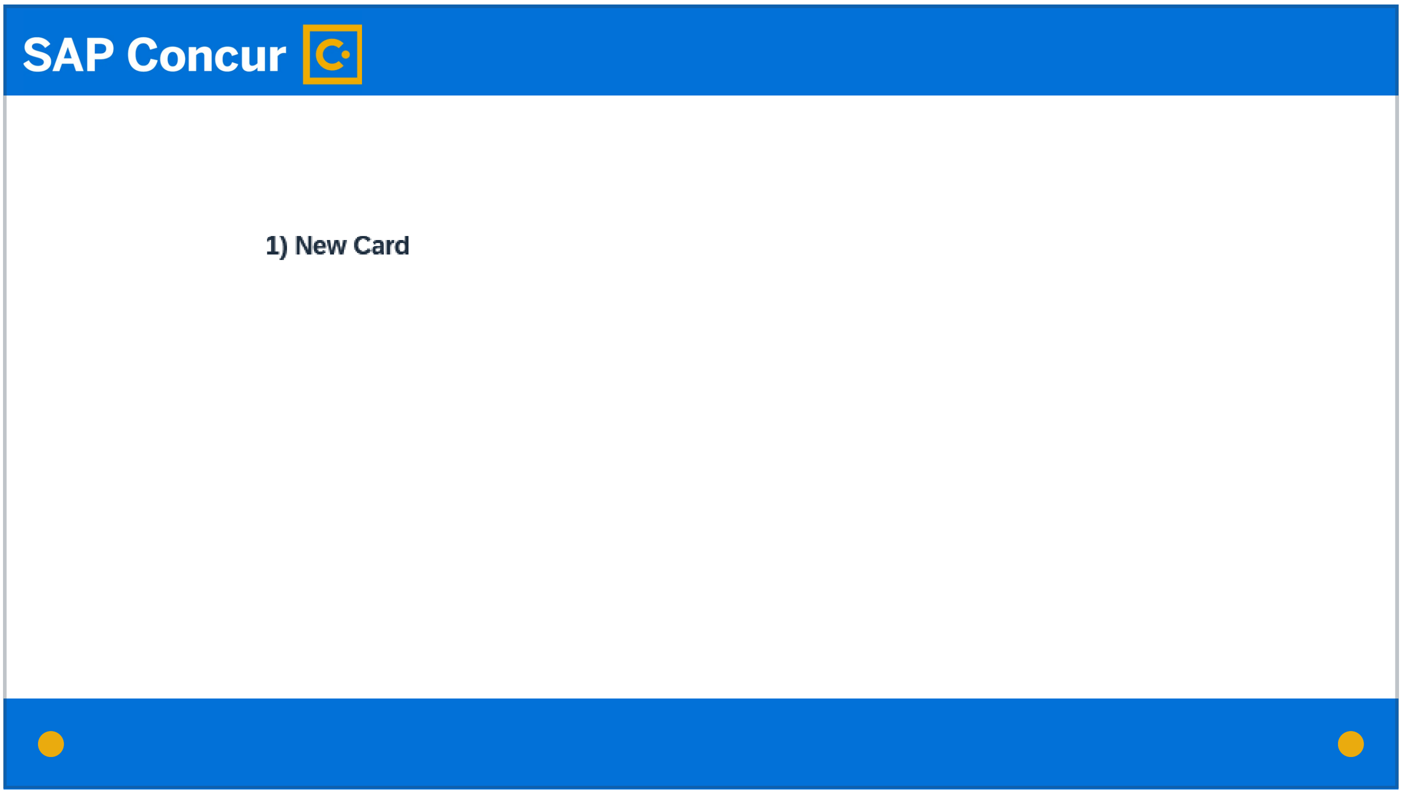
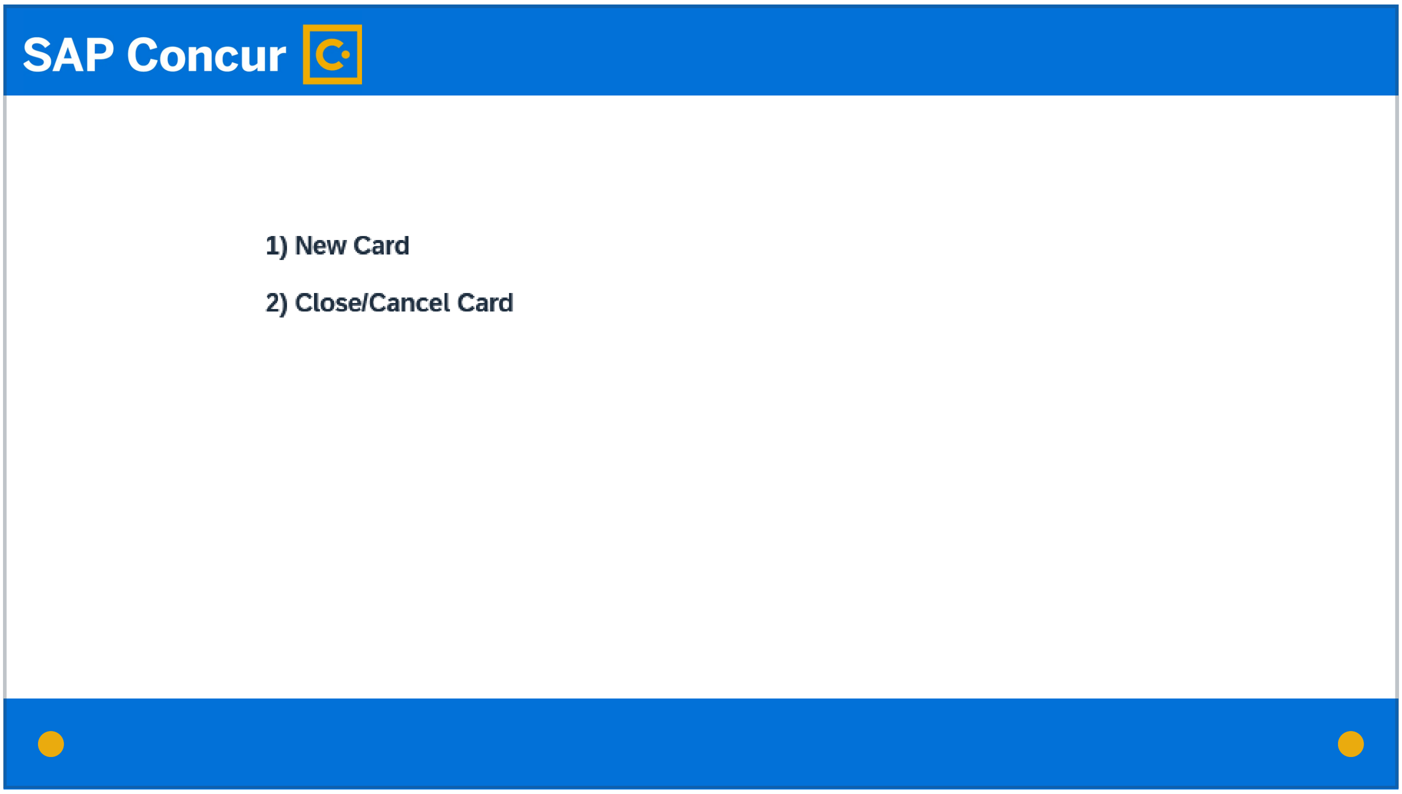


Welcome to our training on creating card requests in Concur.

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

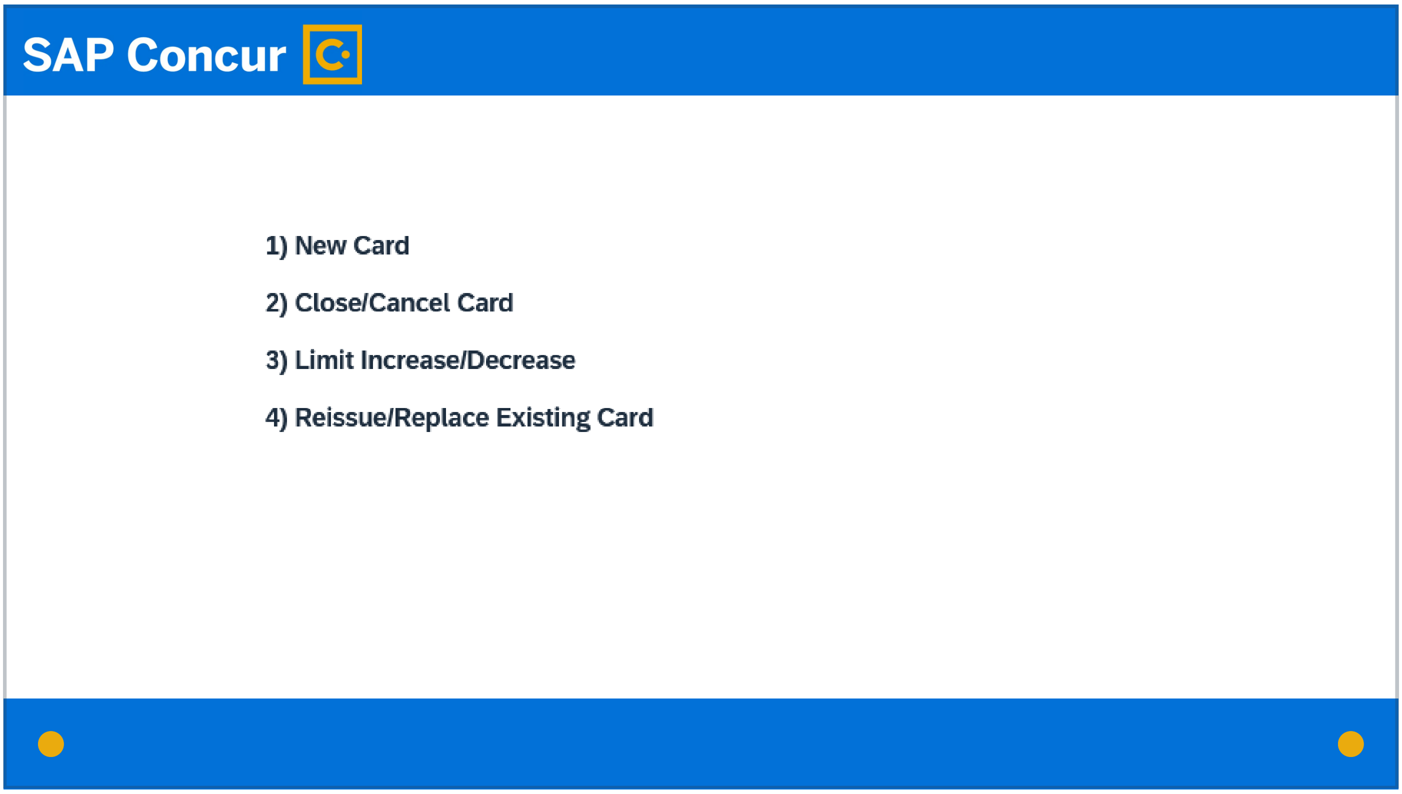


In addition to requests for new cards, the card request should also be used to request changes to existing cards,

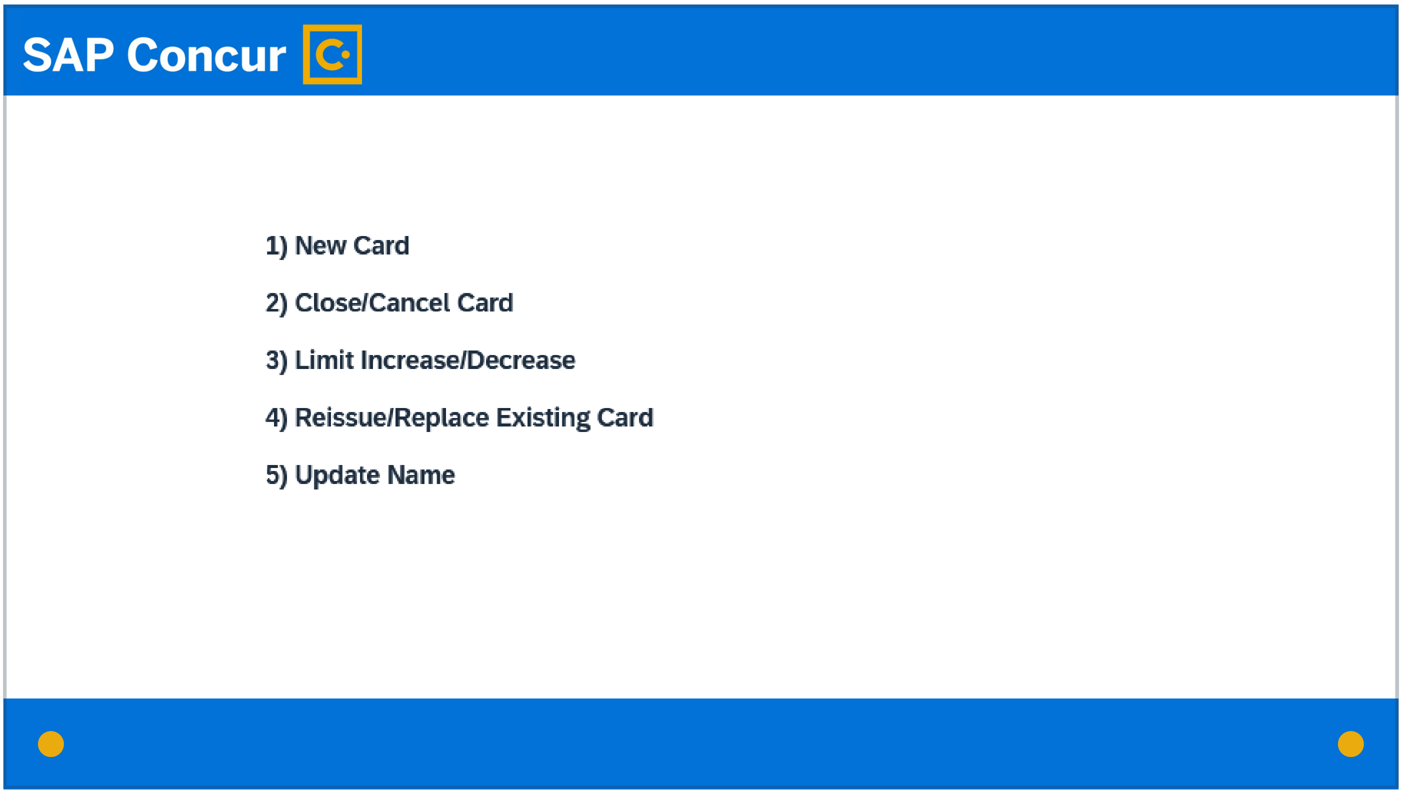


including closing the card,

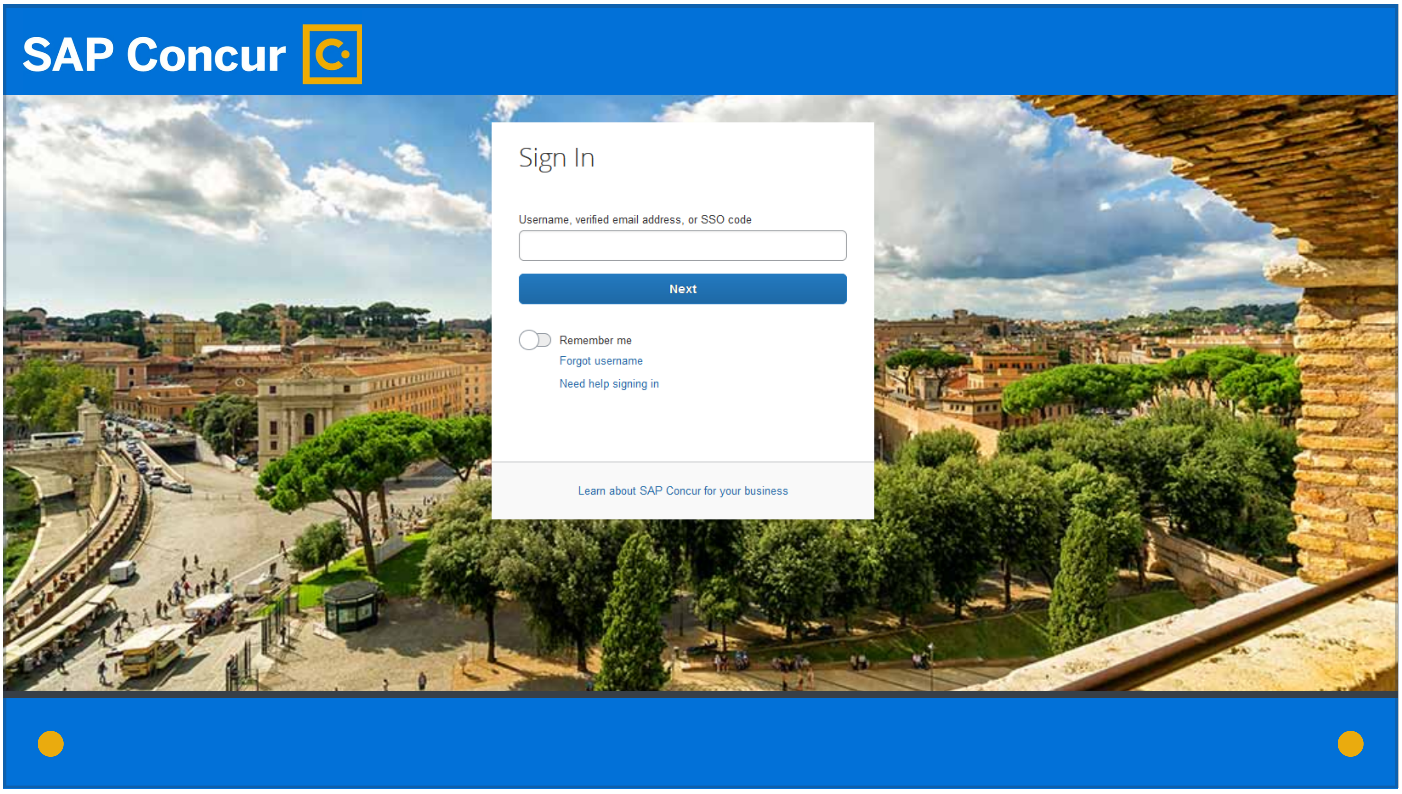
changing the credit limit associated with the card,



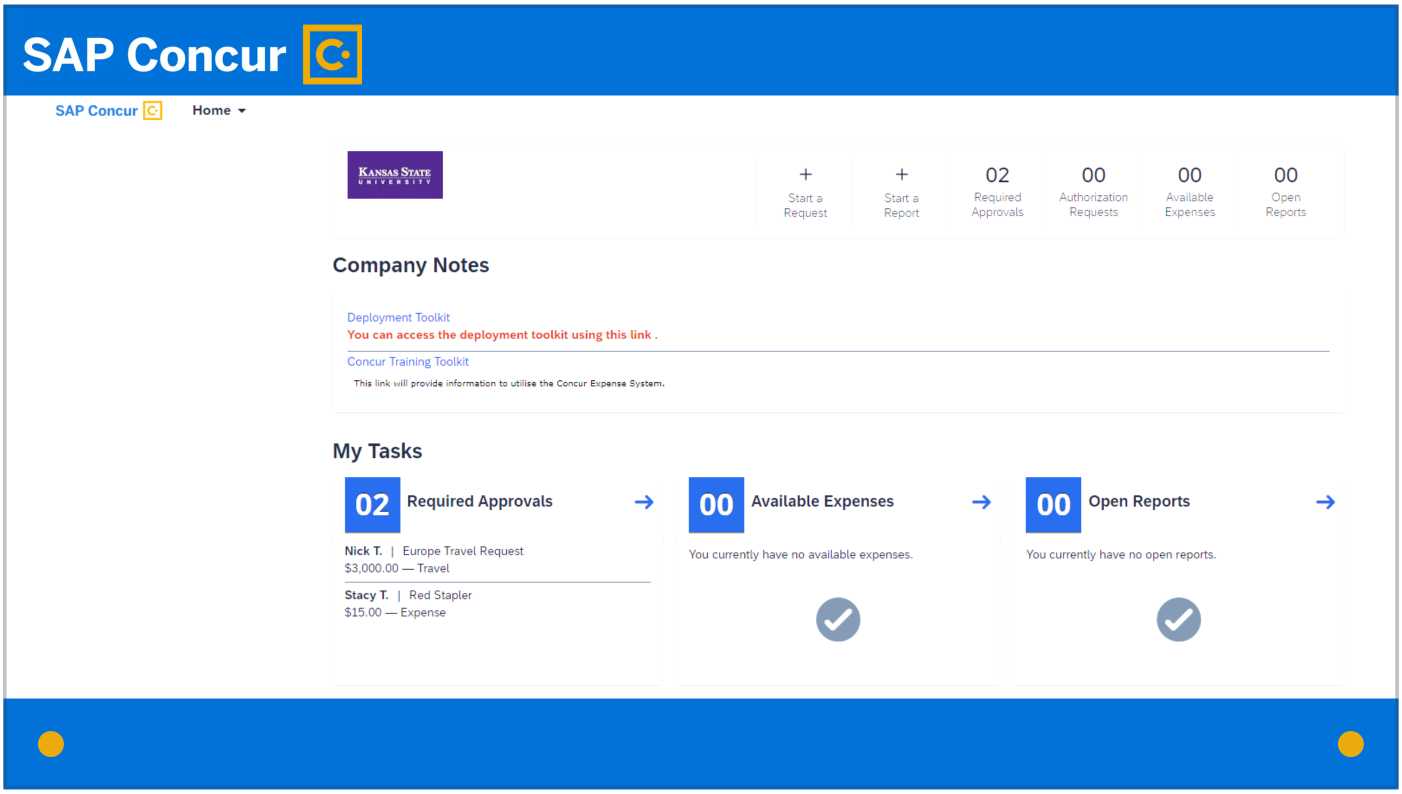
reissuing an existing card



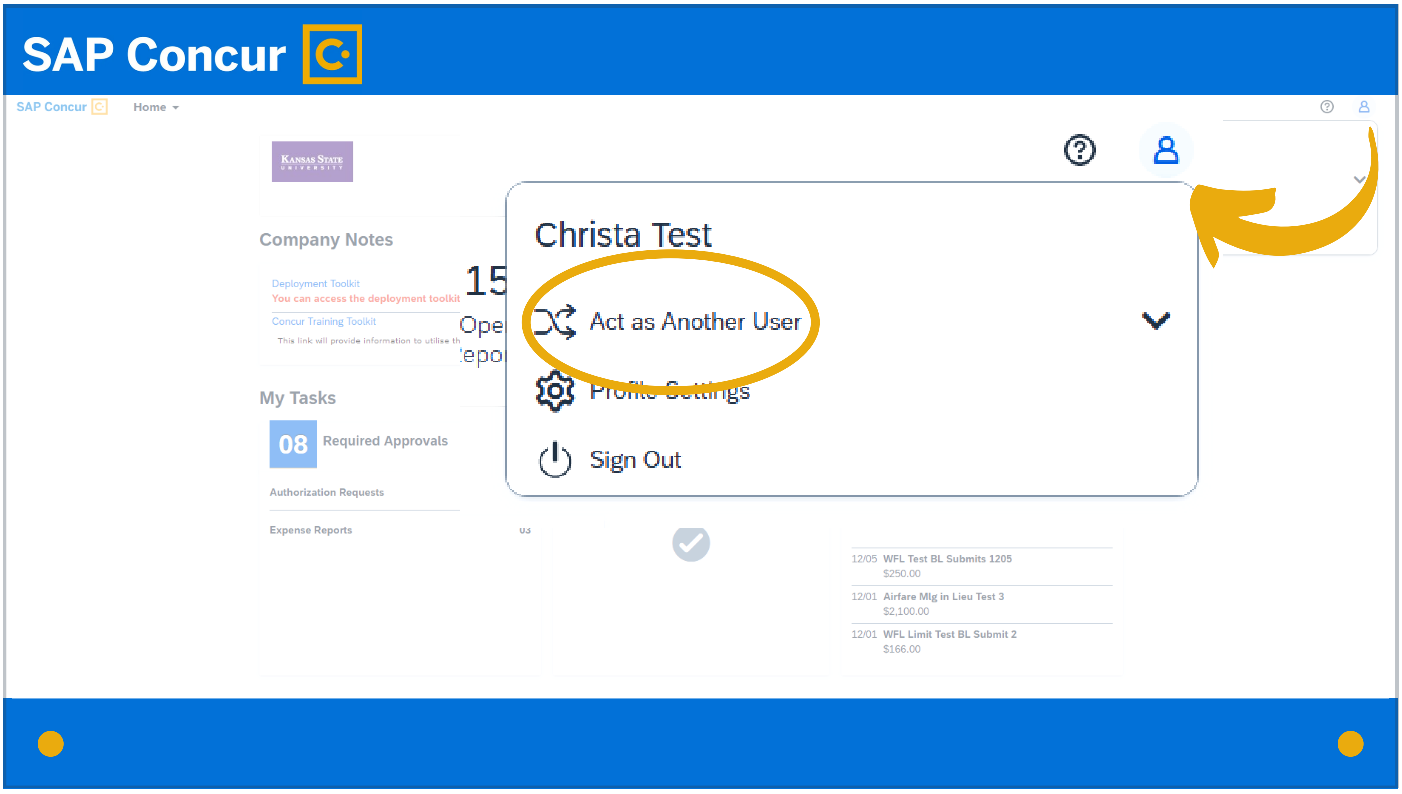
or updating the name on the card due to legal name changes or—in the case of vehicle cards—changes in the person identified as responsible for the card.



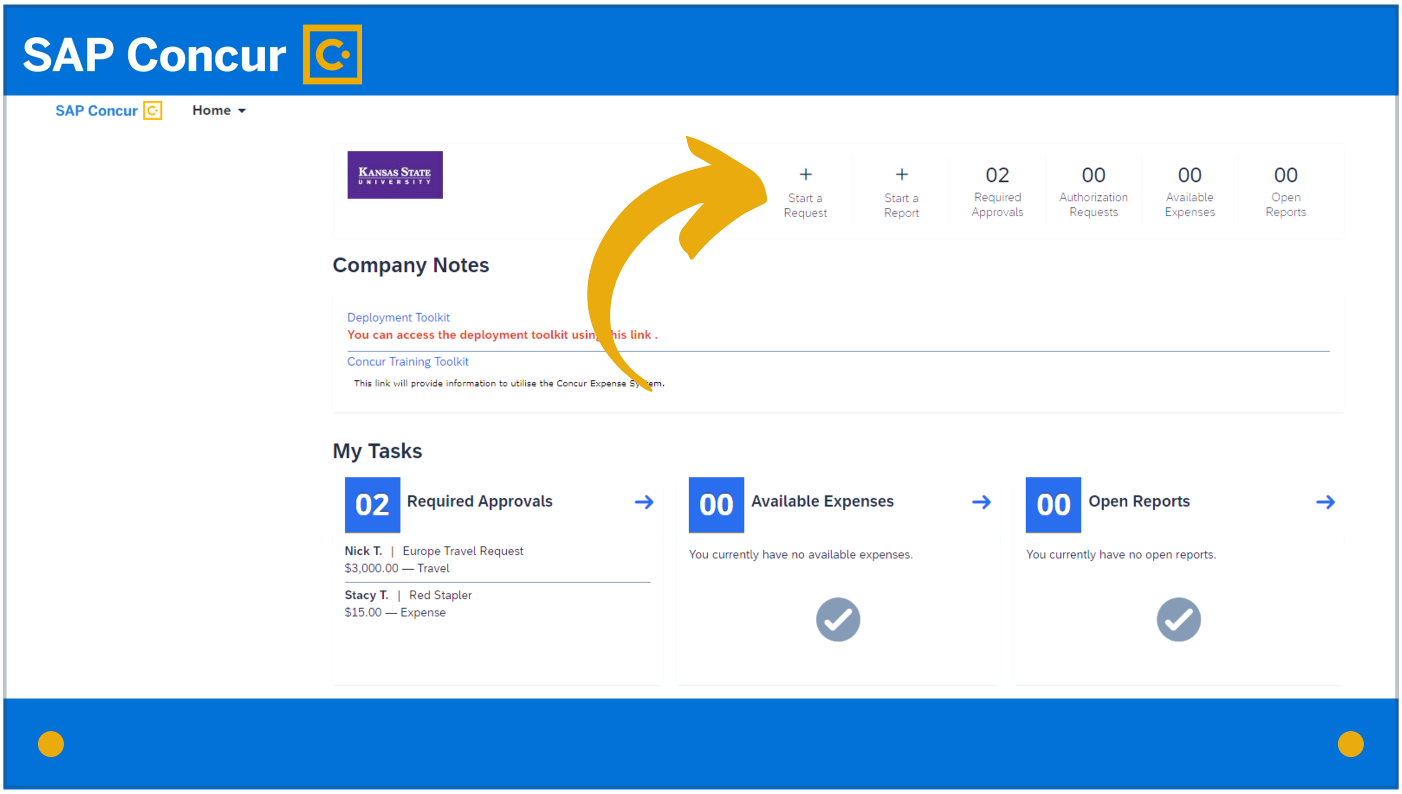
To begin the process of completing a card request, log in to Concur.



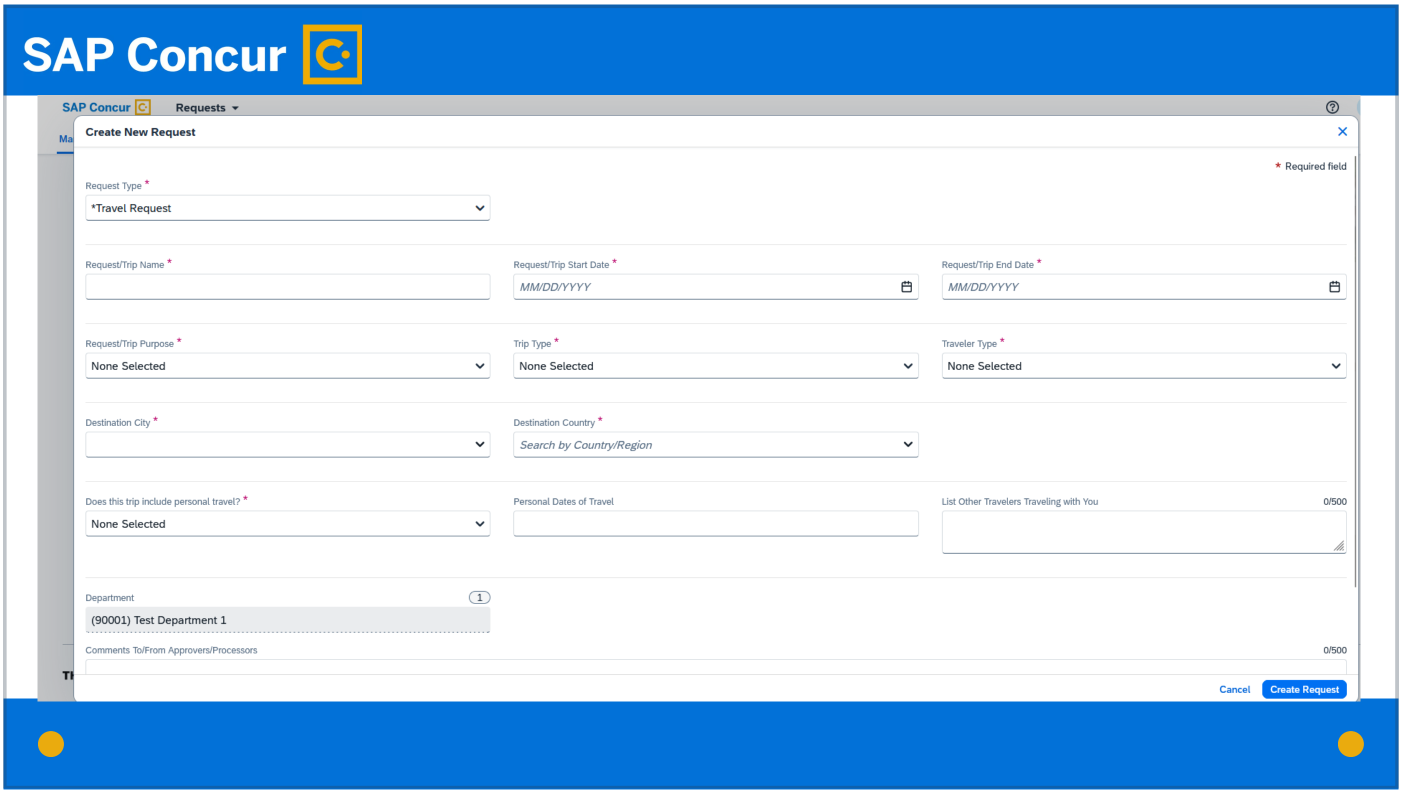
The log-in process takes you to your personal profile. If you are the employee requesting the card, this is the profile you want to use.



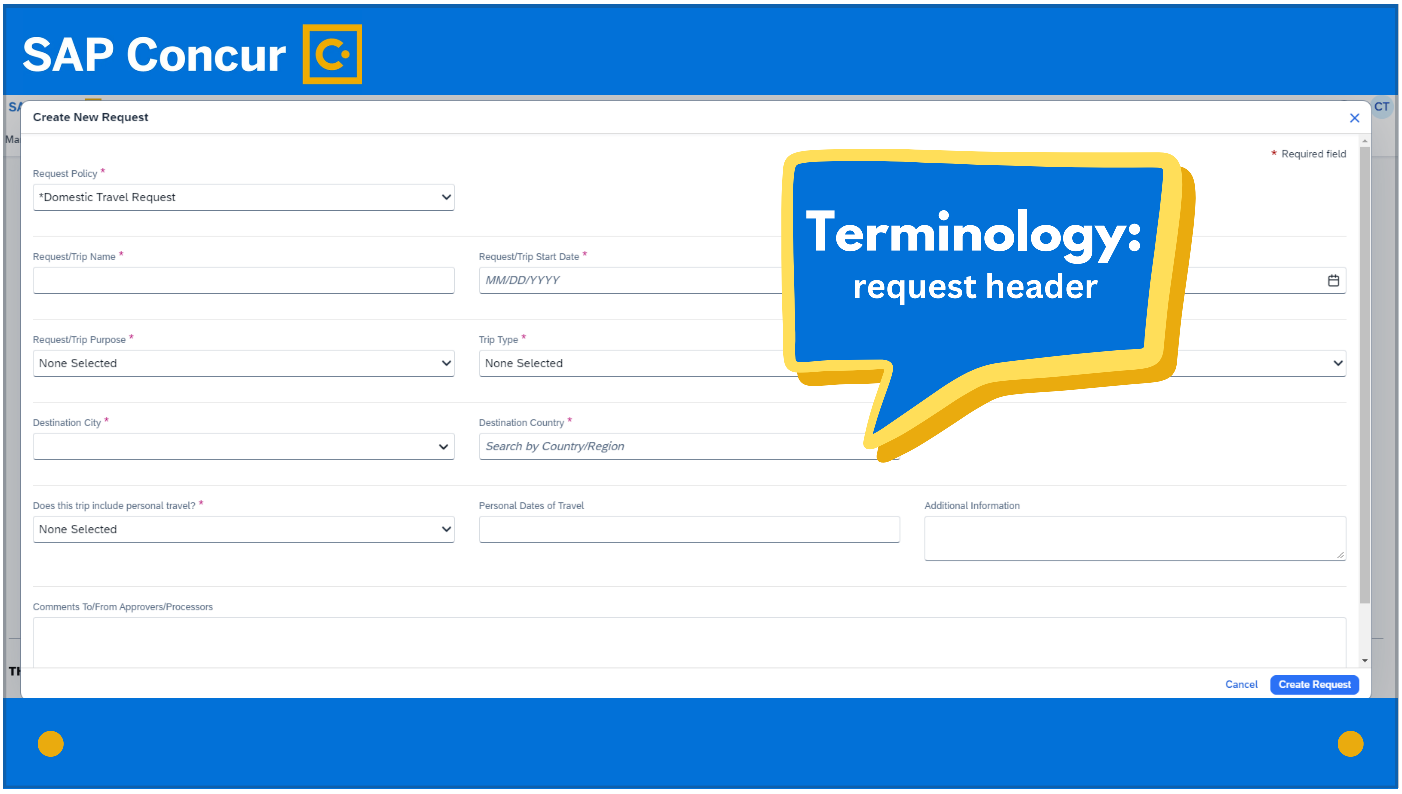
If you are a delegate acting on behalf of the employee, you want to switch to that employee's profile. For instructions on how to do this, please refer to our Delegates training video.



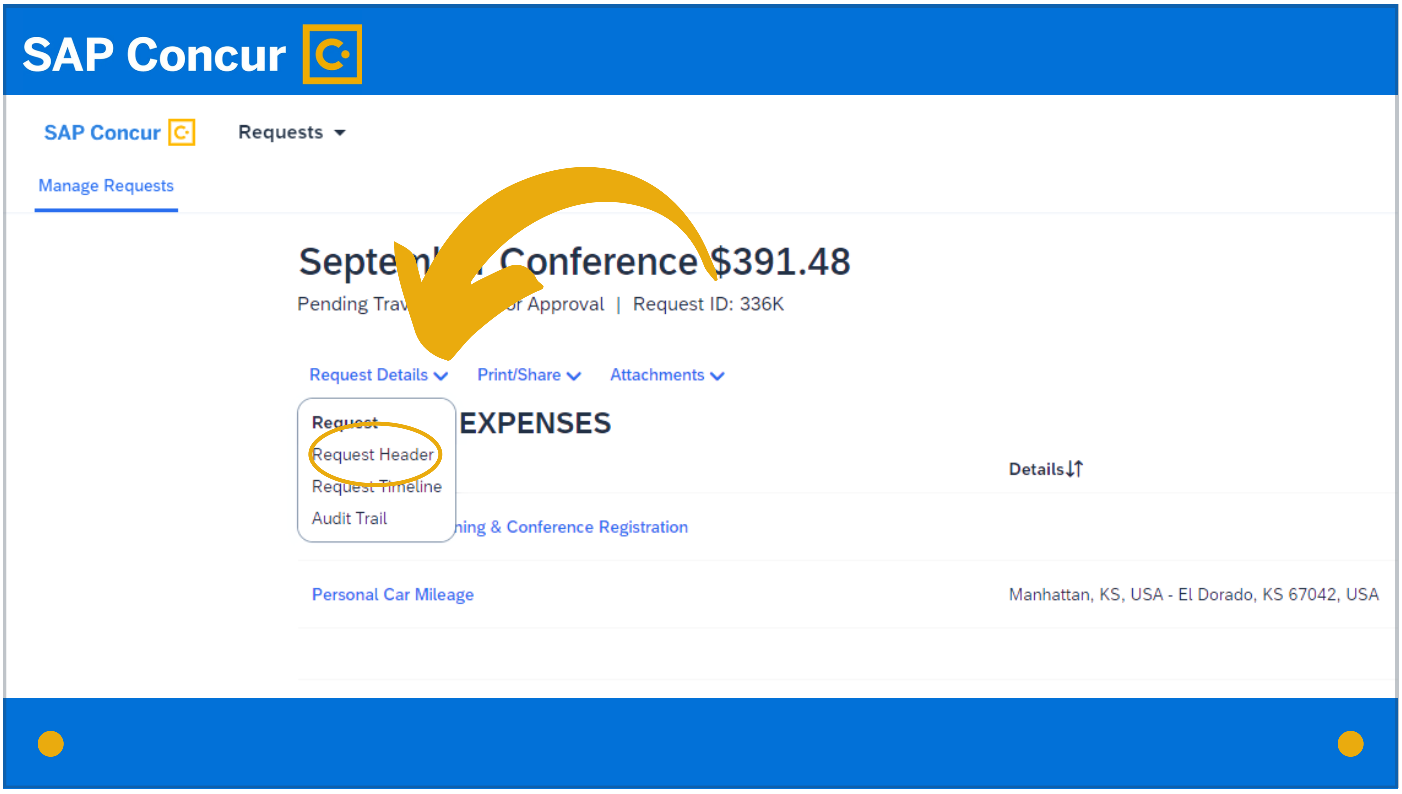
Click on Start a Request.



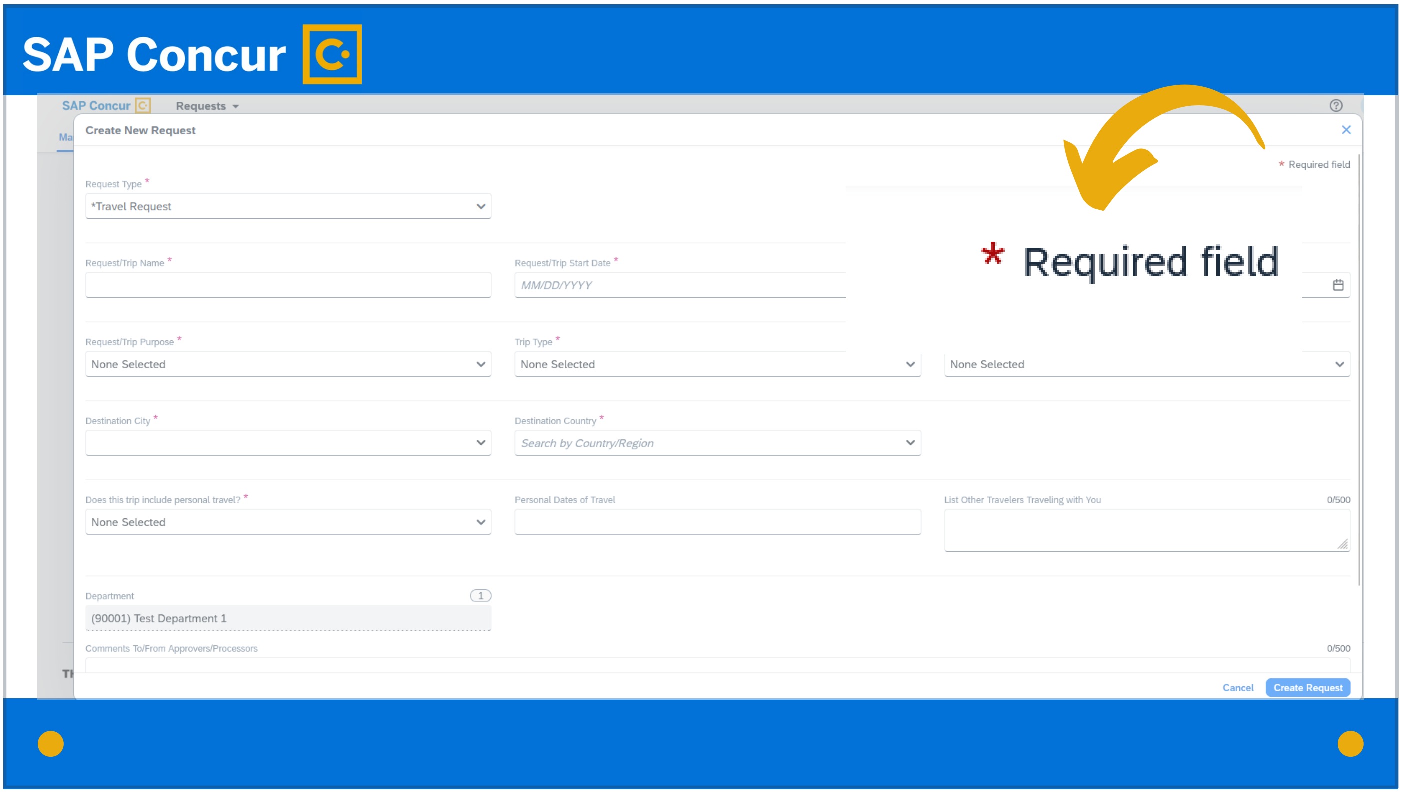
You will see a screen that looks like this.



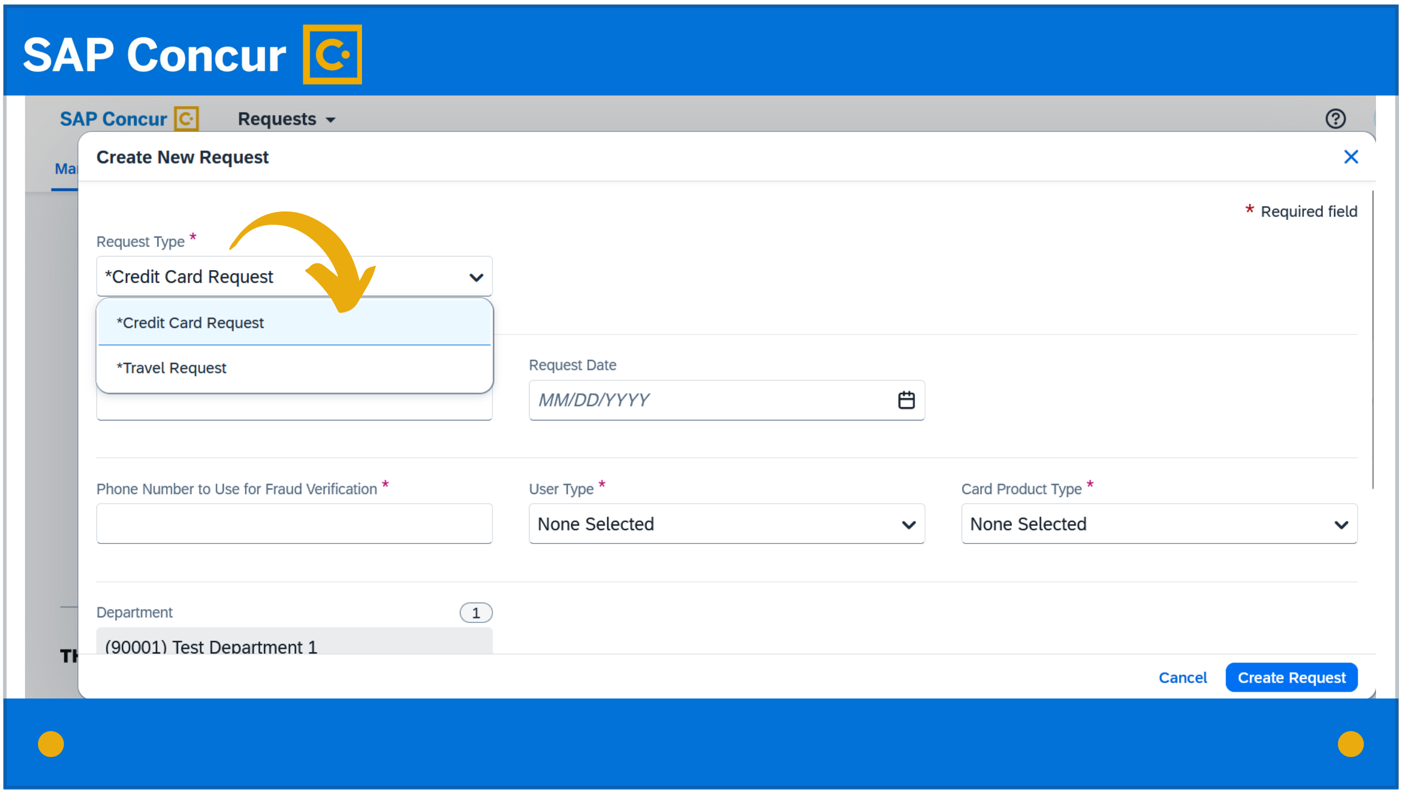
Concur refers to the details on this screen as the request header.



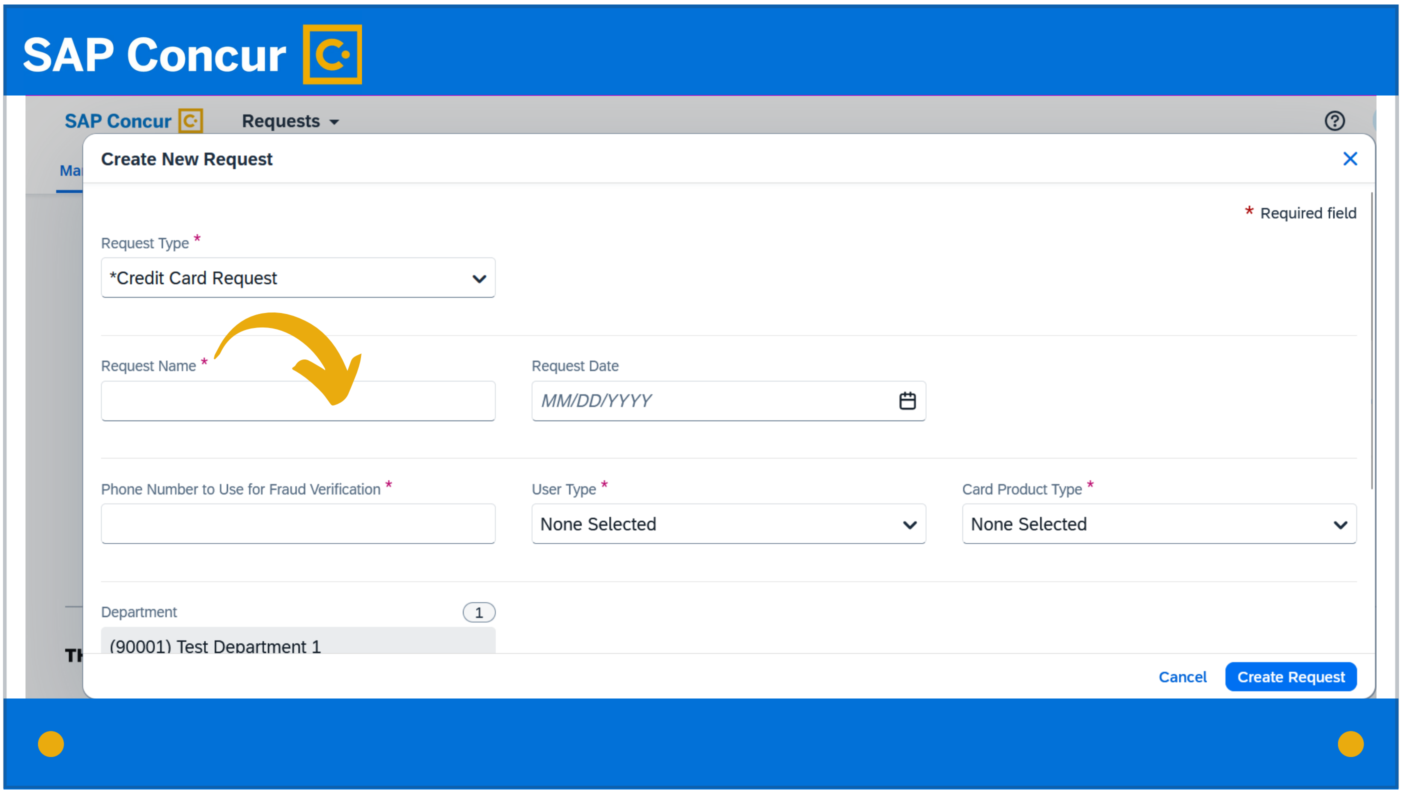
You can always get back to the request header screen to view or edit it under the Request Details dropdown menu.



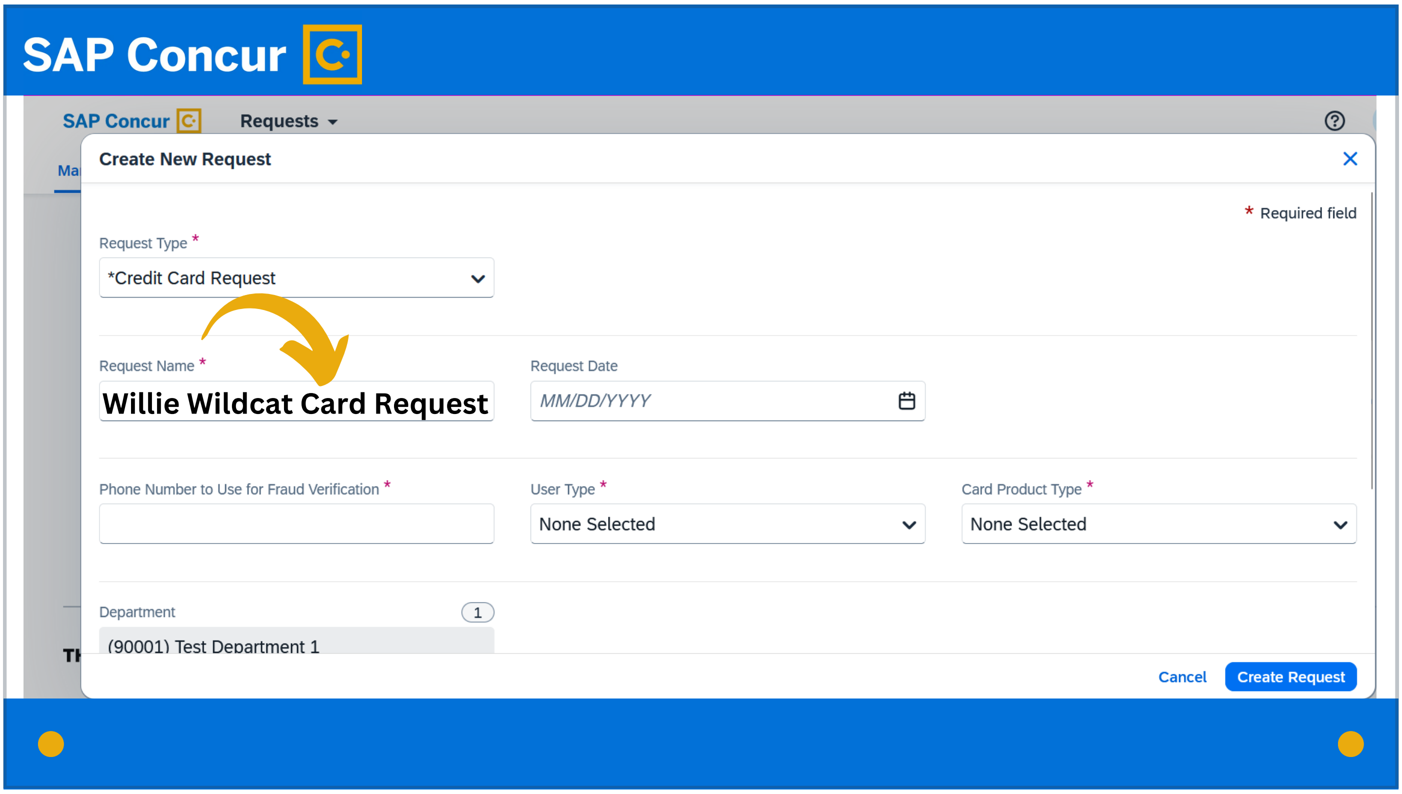
All fields on the header marked with a red asterisk are required fields and must be filled out.



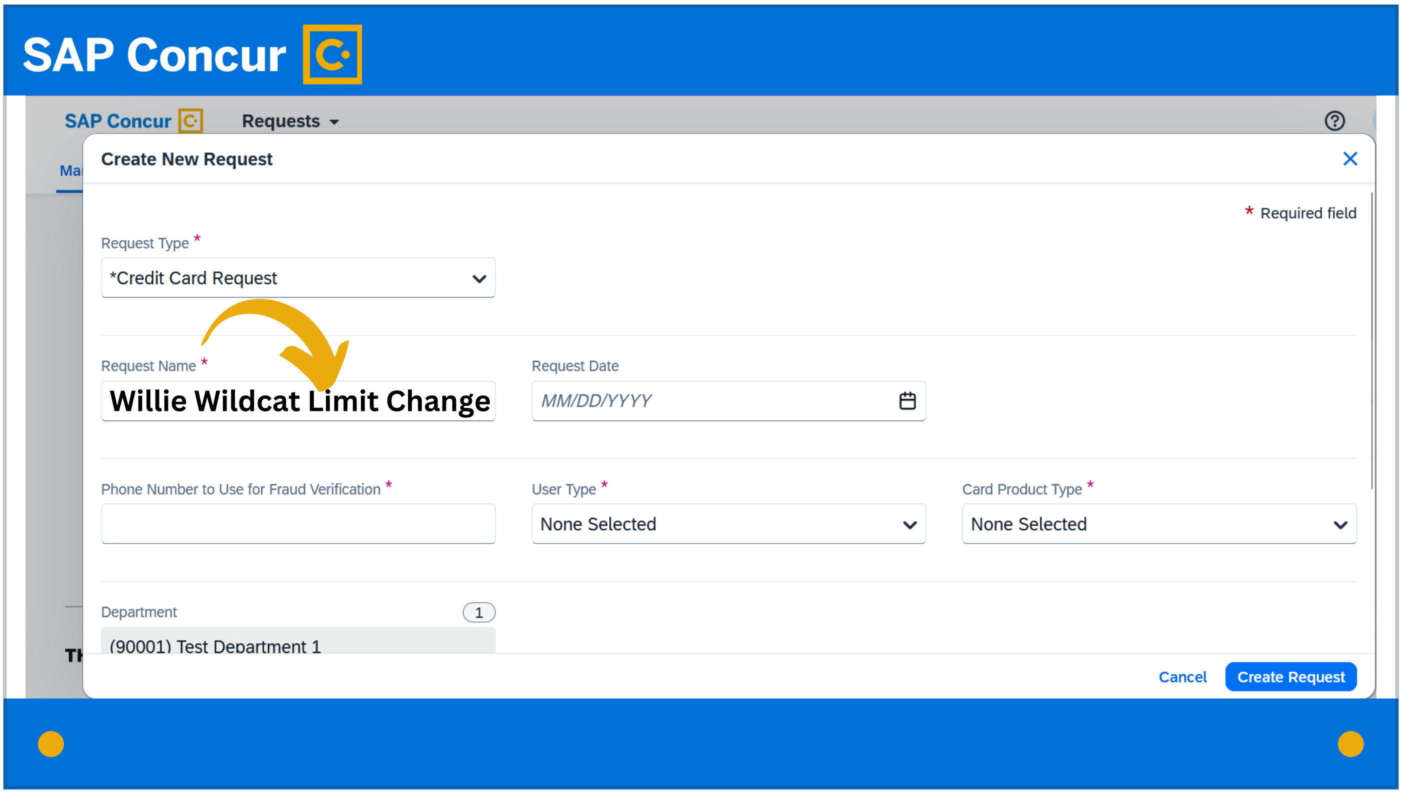
The first field is for the Request Type—in this case, credit card request.



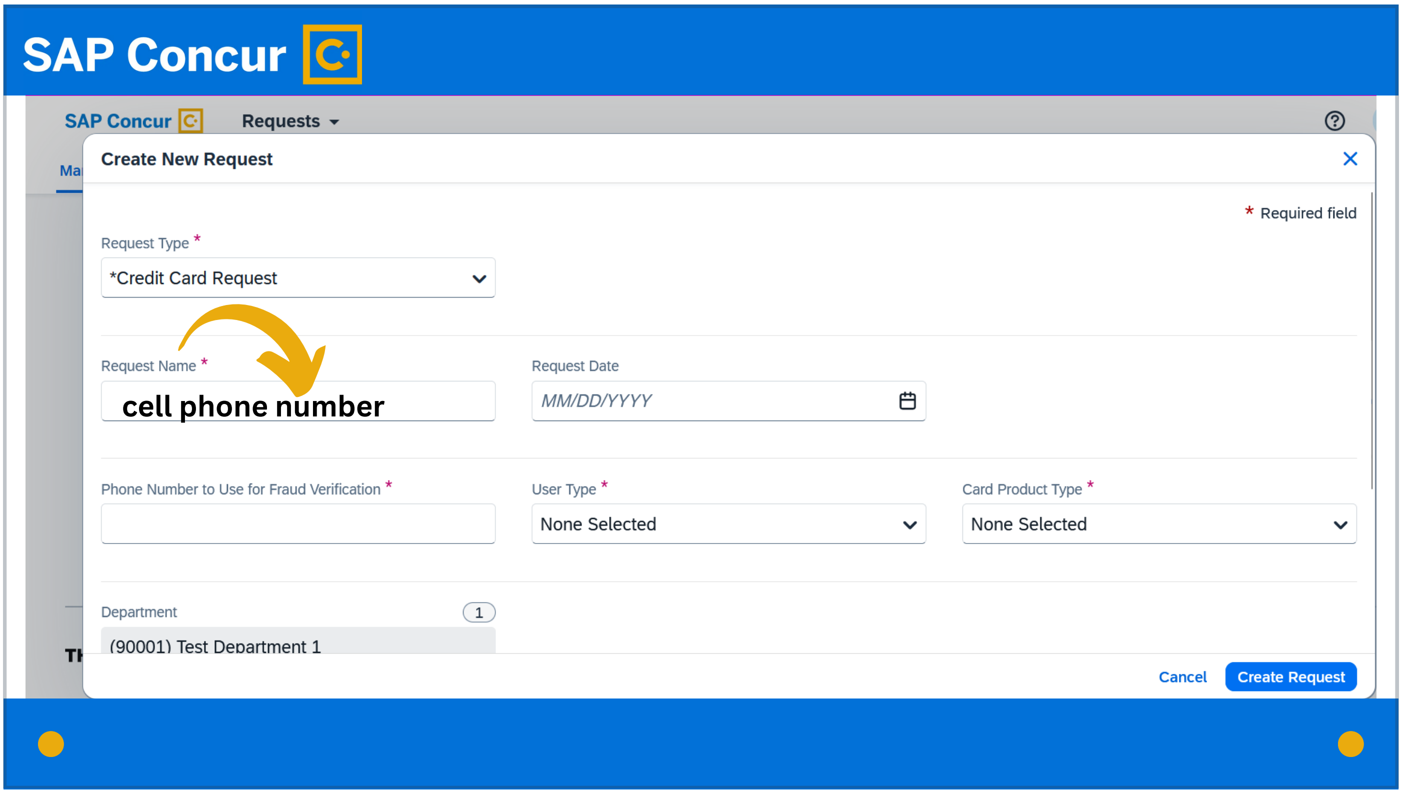
In the Request Name field, include the cardholder's name and the explanation of what the request is for,



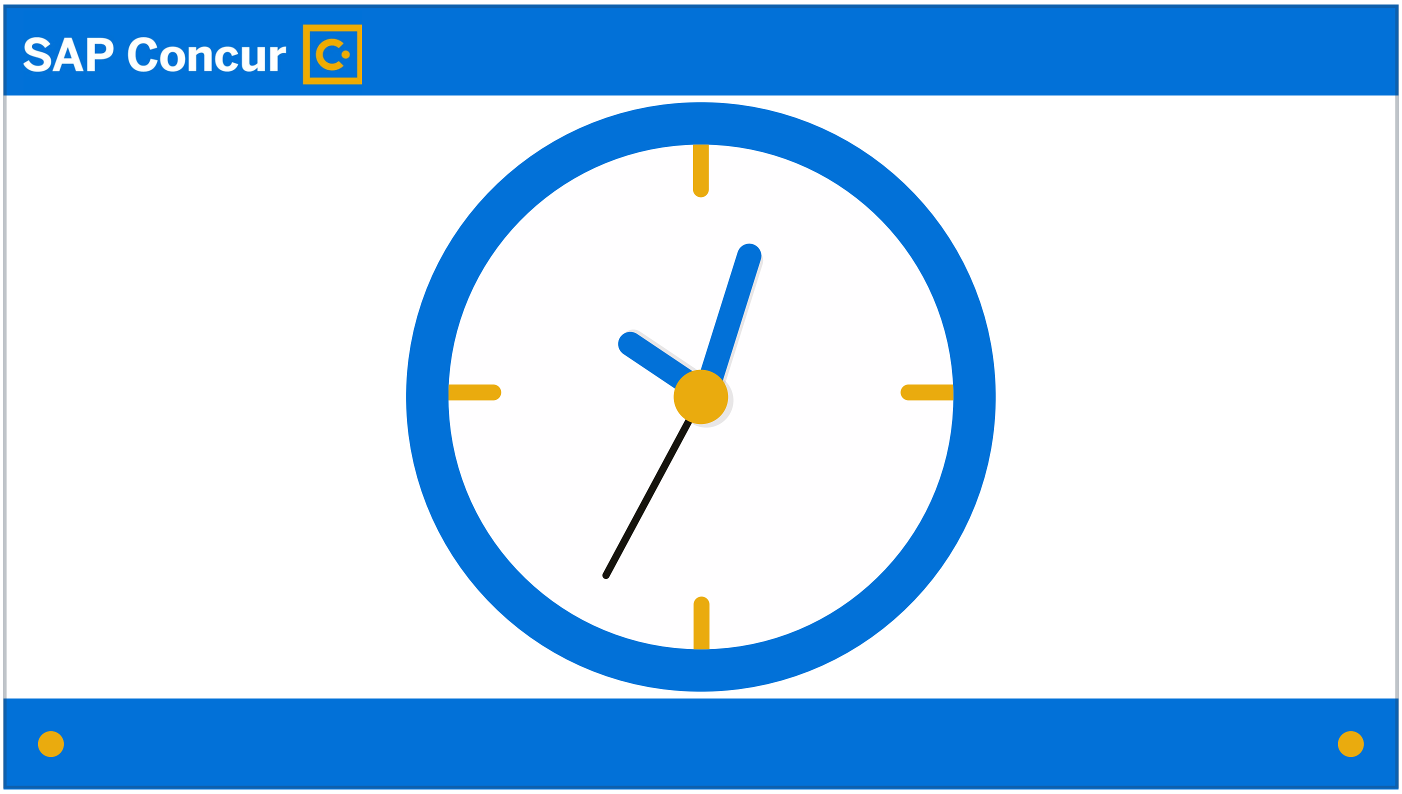
for example, Willie Wildcat New Card Request



or Willie Wildcat Limit Change, etc.

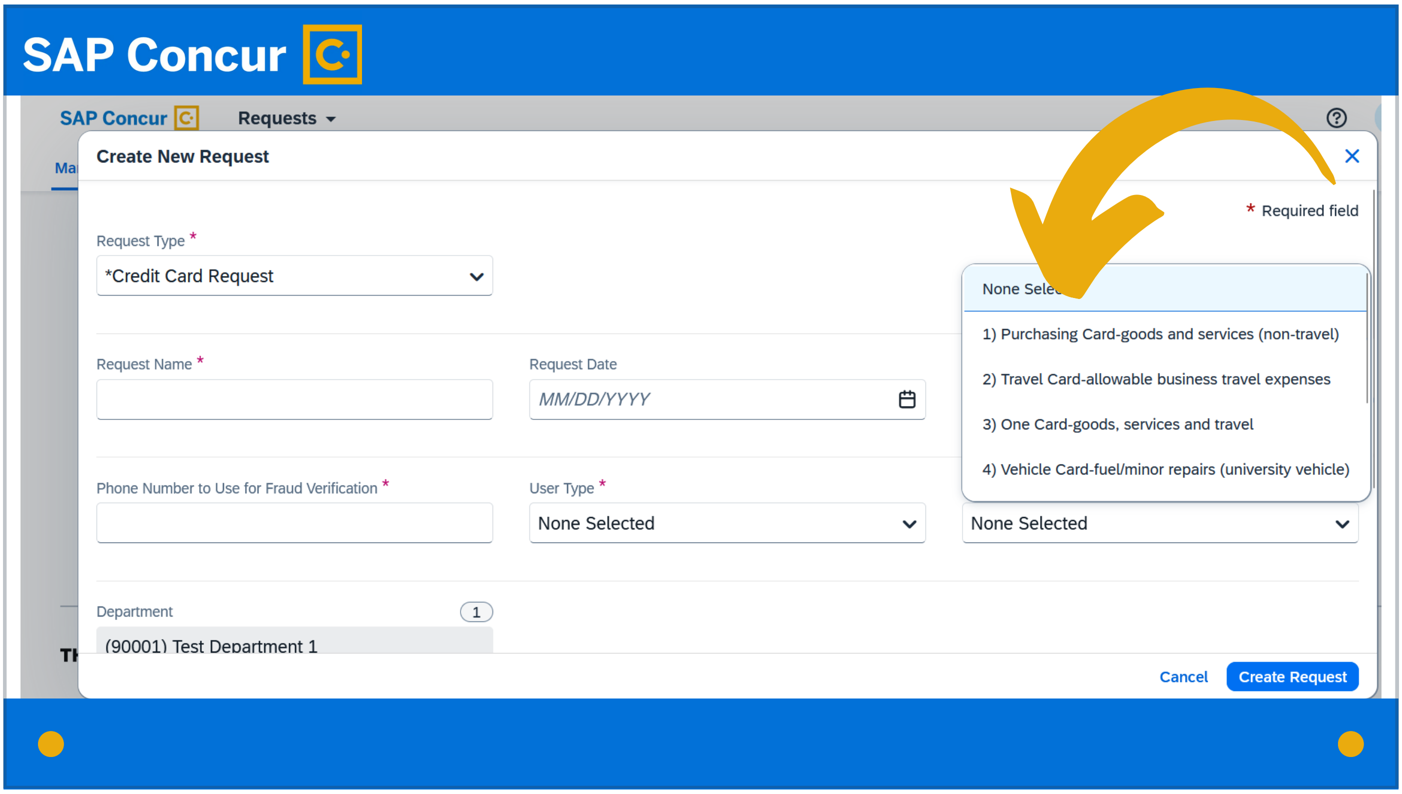


For the Phone Number to Use for Fraud field, it is recommended to use the cardholder's cell phone number.

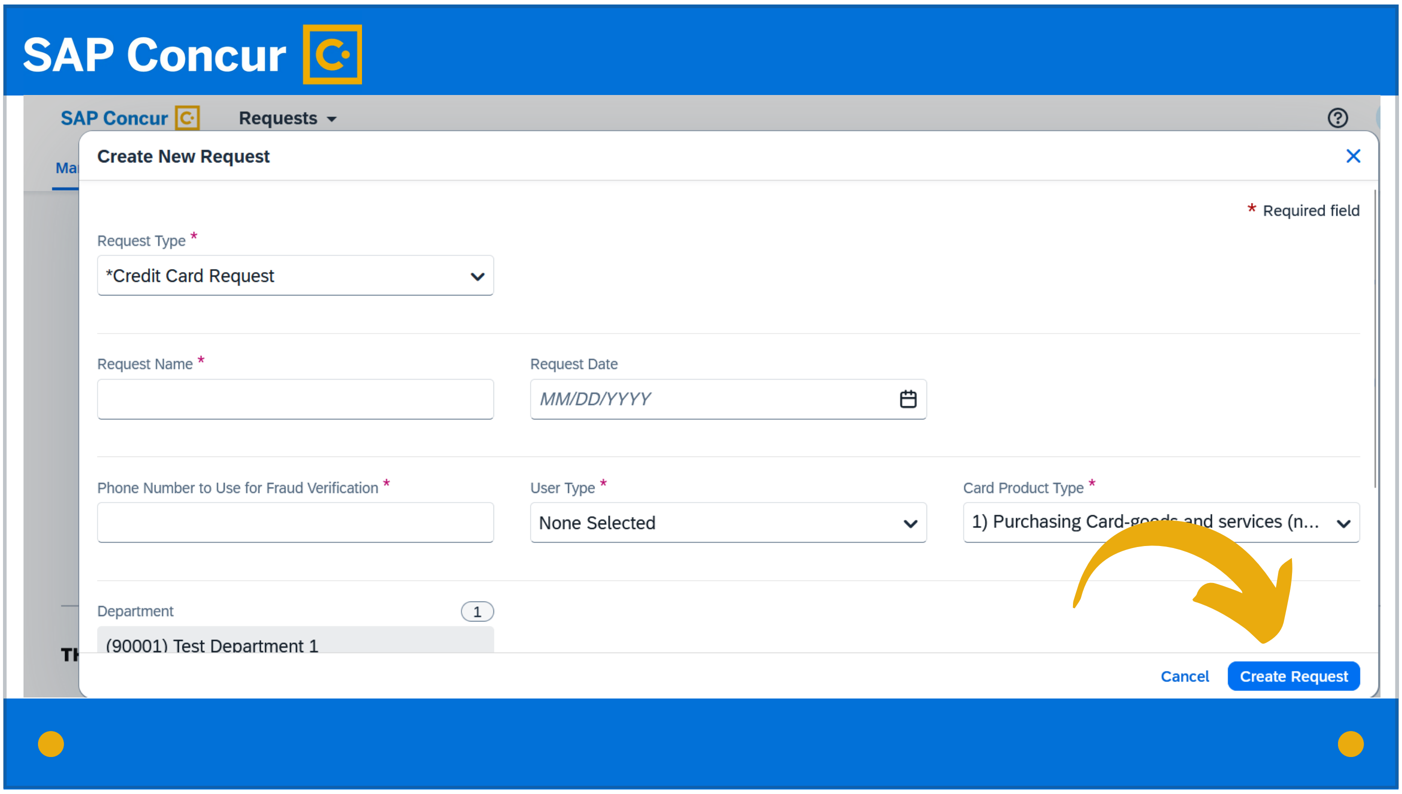


This should be a phone number the bank can use to reach the cardholder at any time—including after business hours—

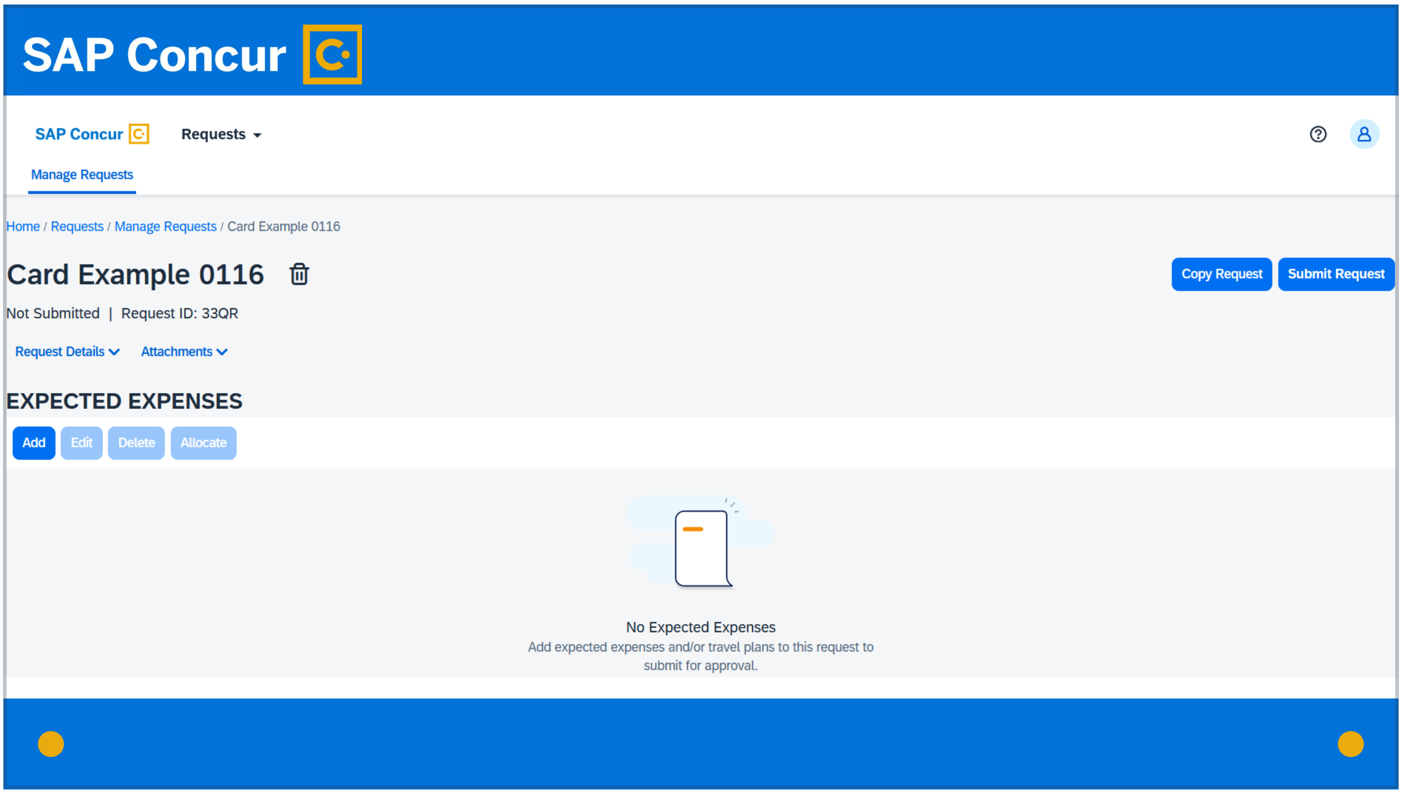
to alert the cardholder of charges flagged as suspected fraud. If the bank is unable to reach the cardholder, a hold may be placed on the card that prevents the charges from going through.



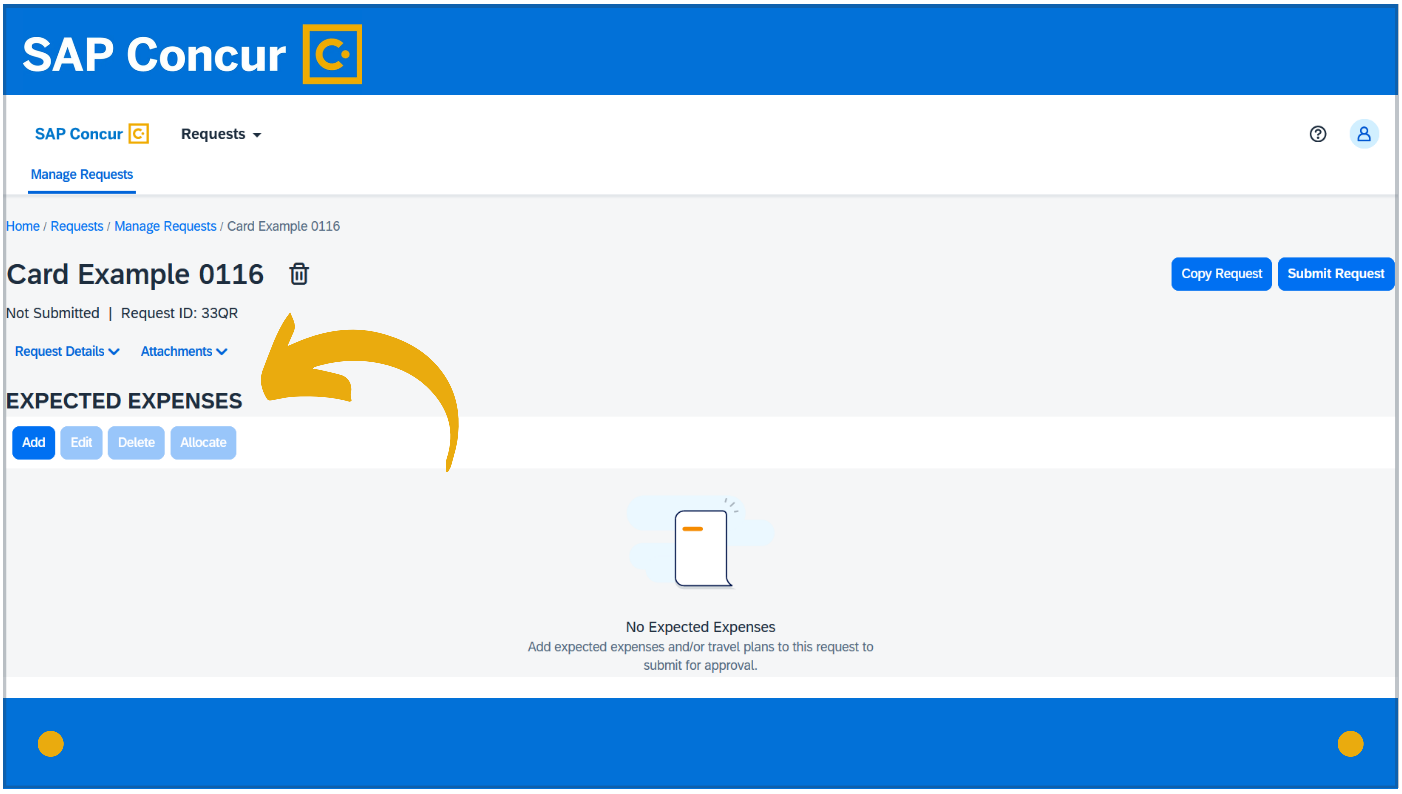
On the Card Product Type field of the Request Header screen, select the type of the card the employee is requesting. For details on the different card types available and which should be selected, please refer to our Card Product Types training video.



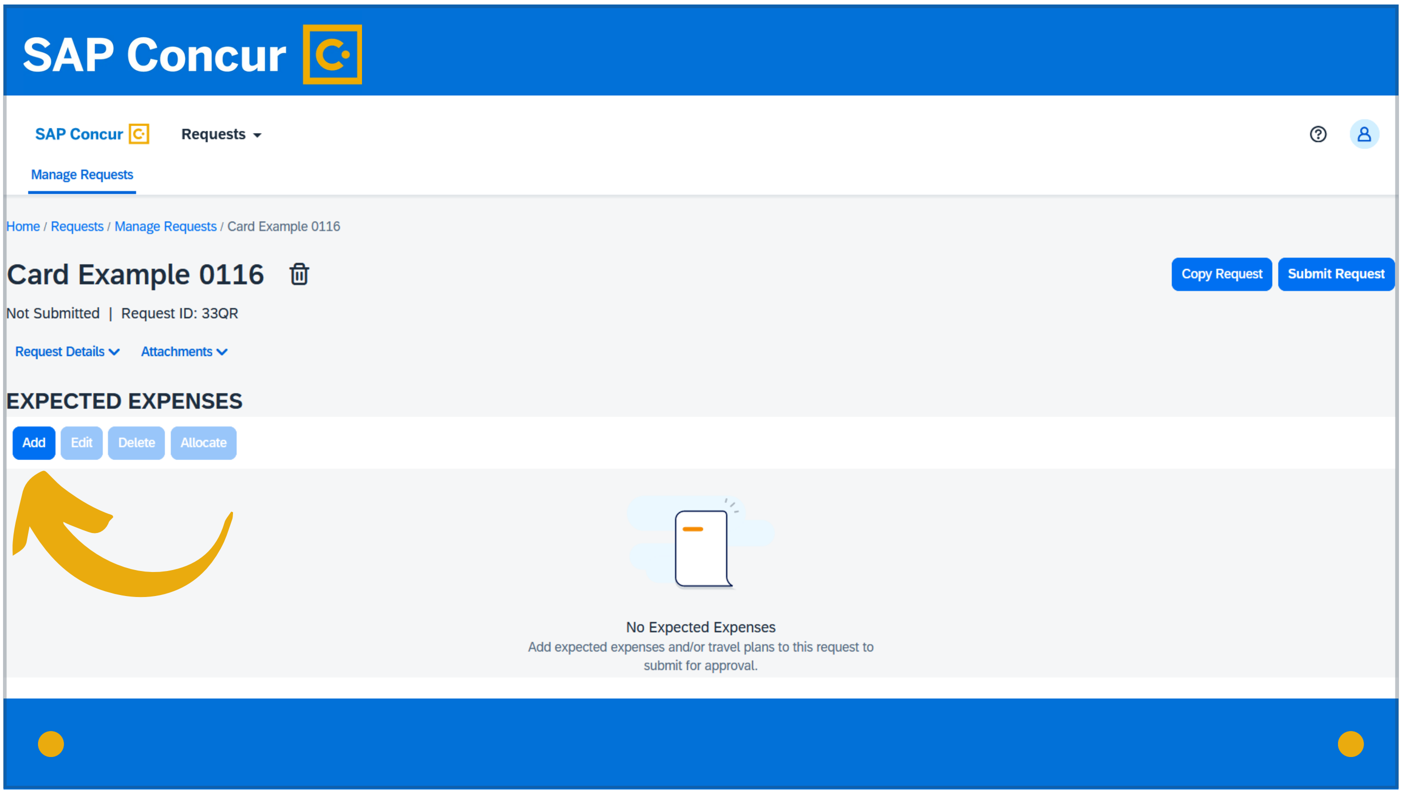
Once you've selected the card product type and all other required and applicable fields are complete, click the Create Request button in the bottom right corner.



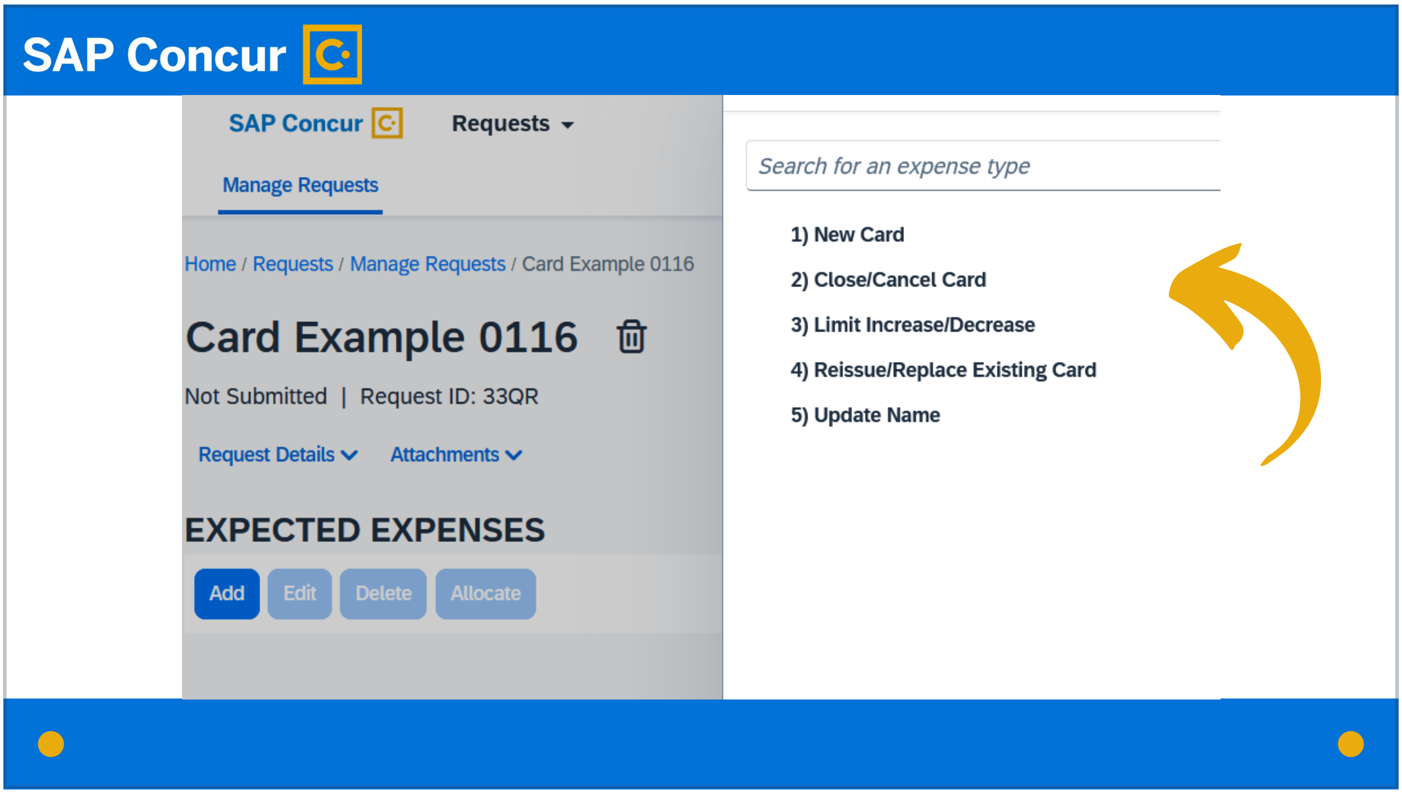
A new screen will appear that will allow you to manage the request.



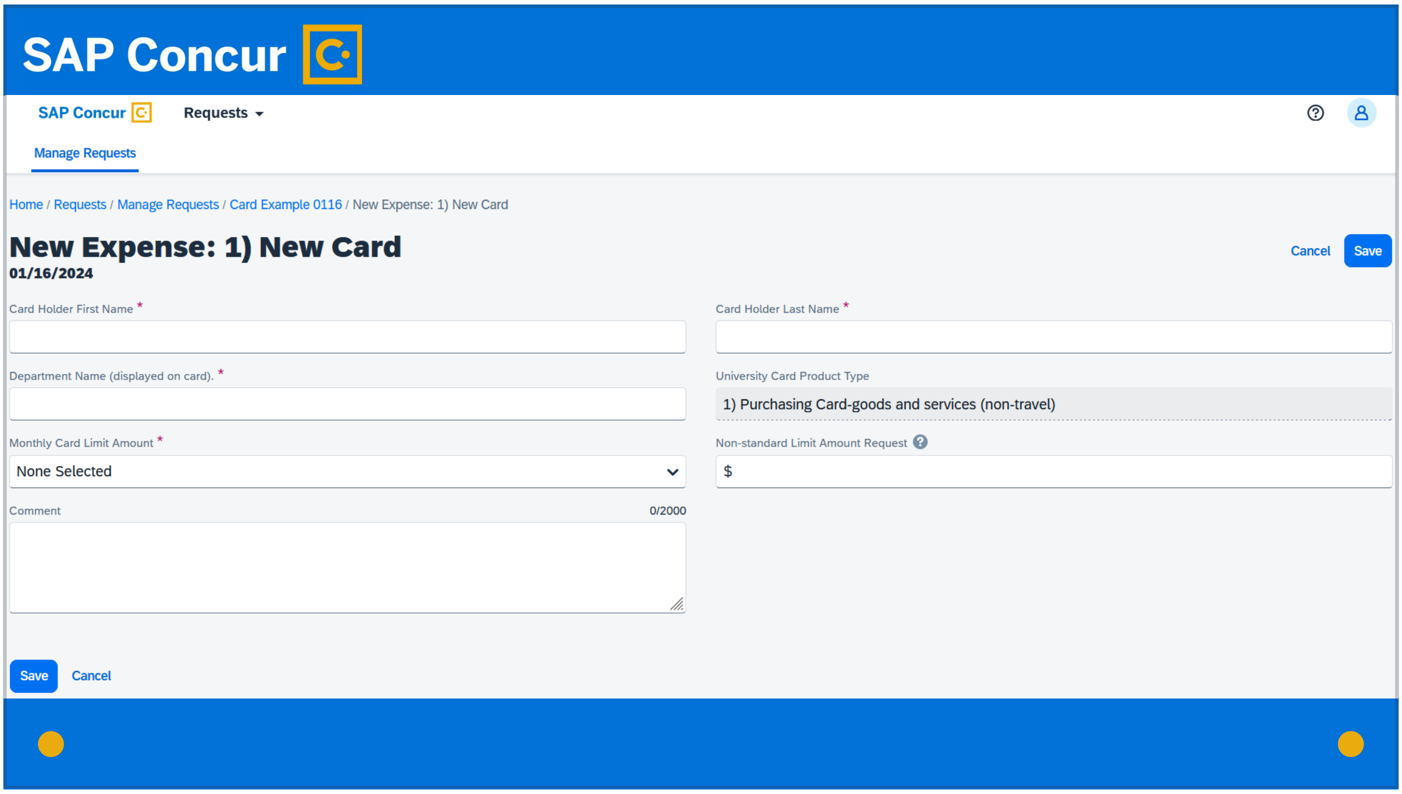
The screen will refer to Expected Expenses because of Concur's prototype request set-up. For our purposes with the card request, we are not adding expenses but adding card request details.



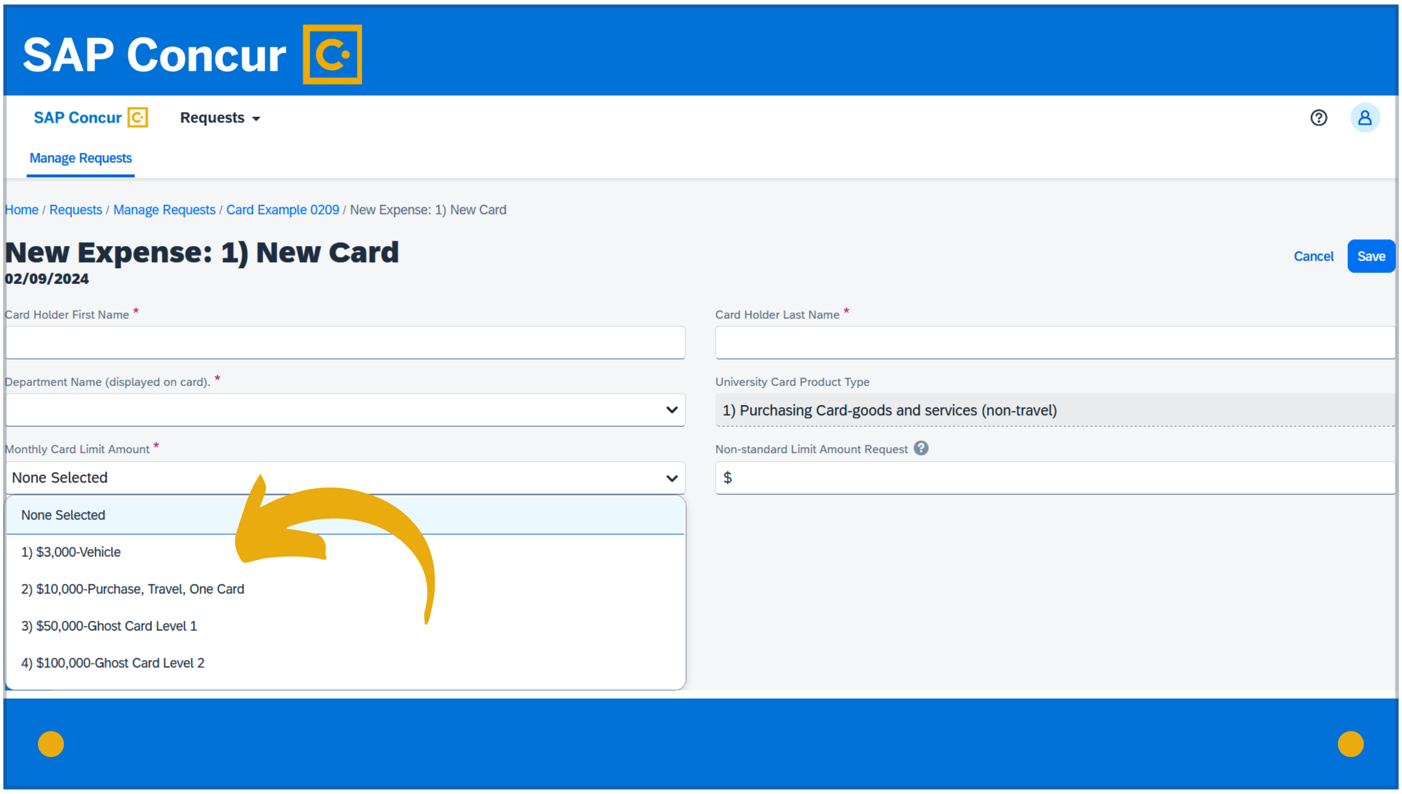
To do this, click the Add button.



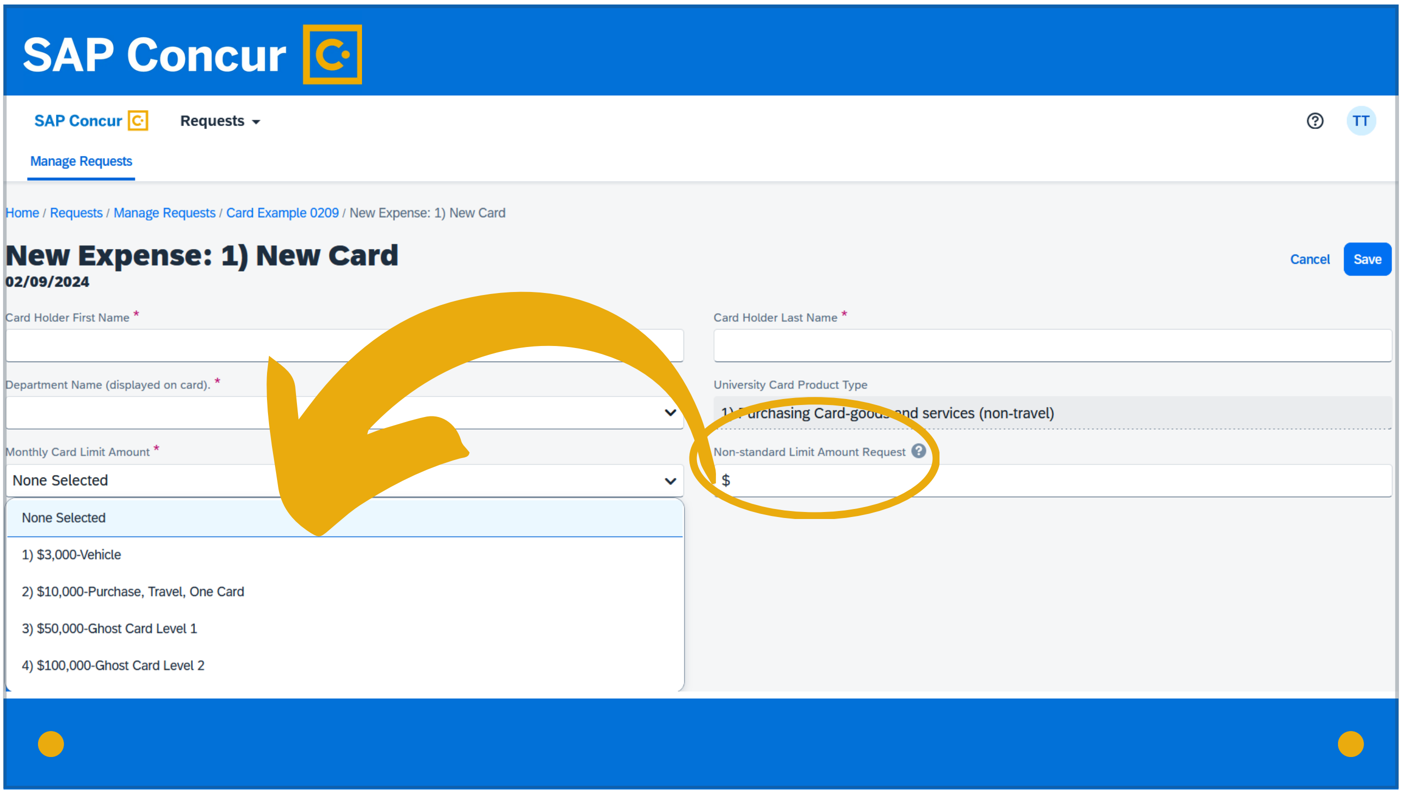
From the list that appears, select the reason for the card request.



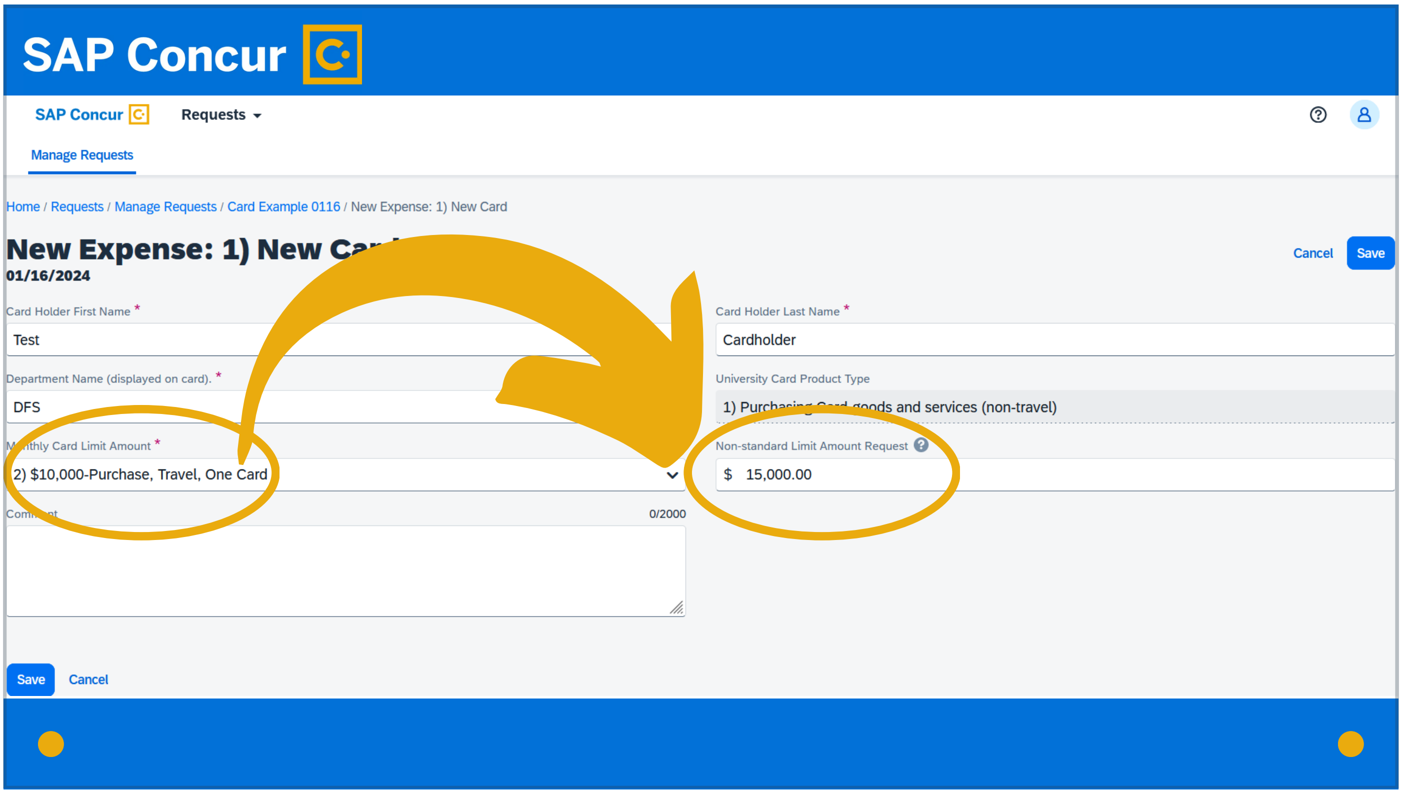
Fill out all required fields, marked with the red asterisk.



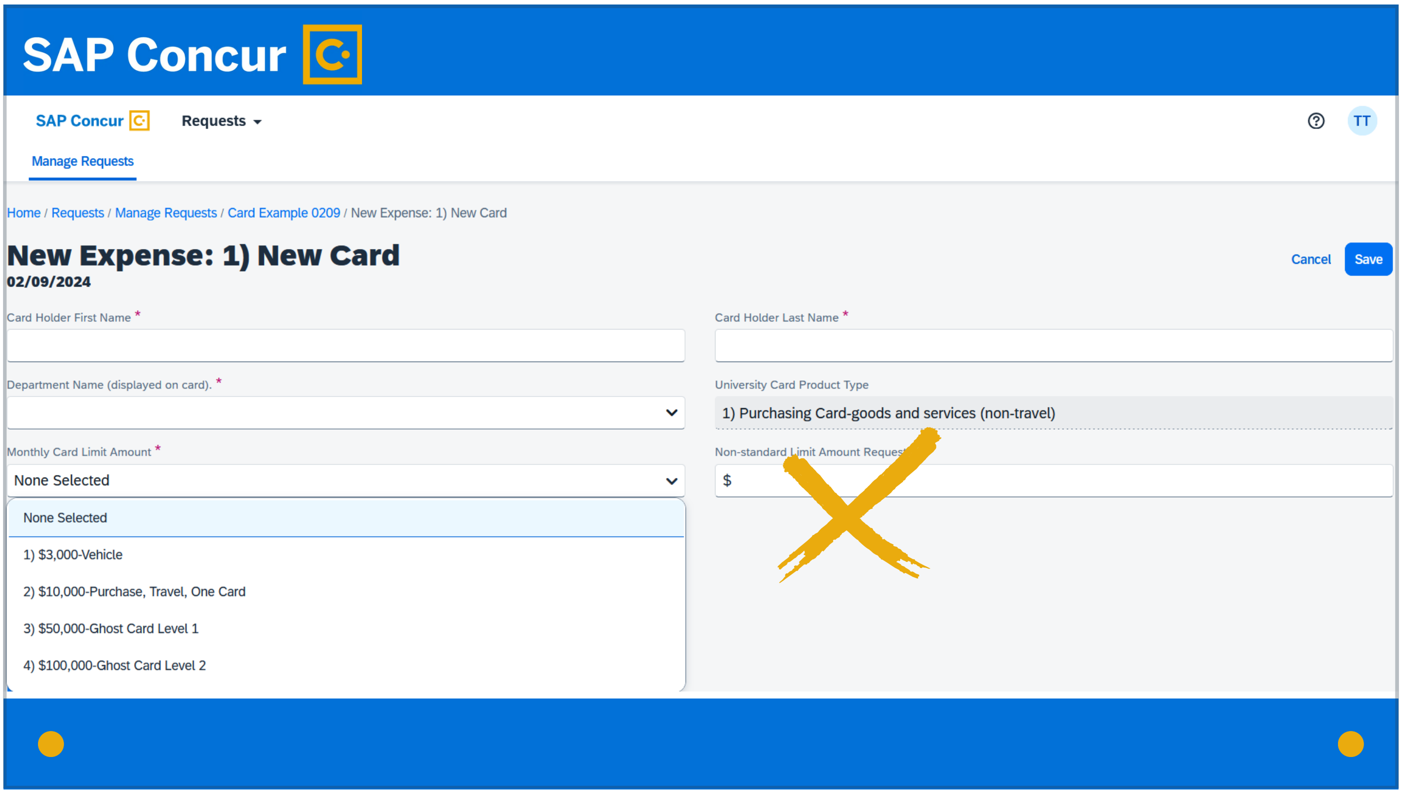
For the Monthly Card Limit Amount field, select the limit that applies to the card type you are requesting.



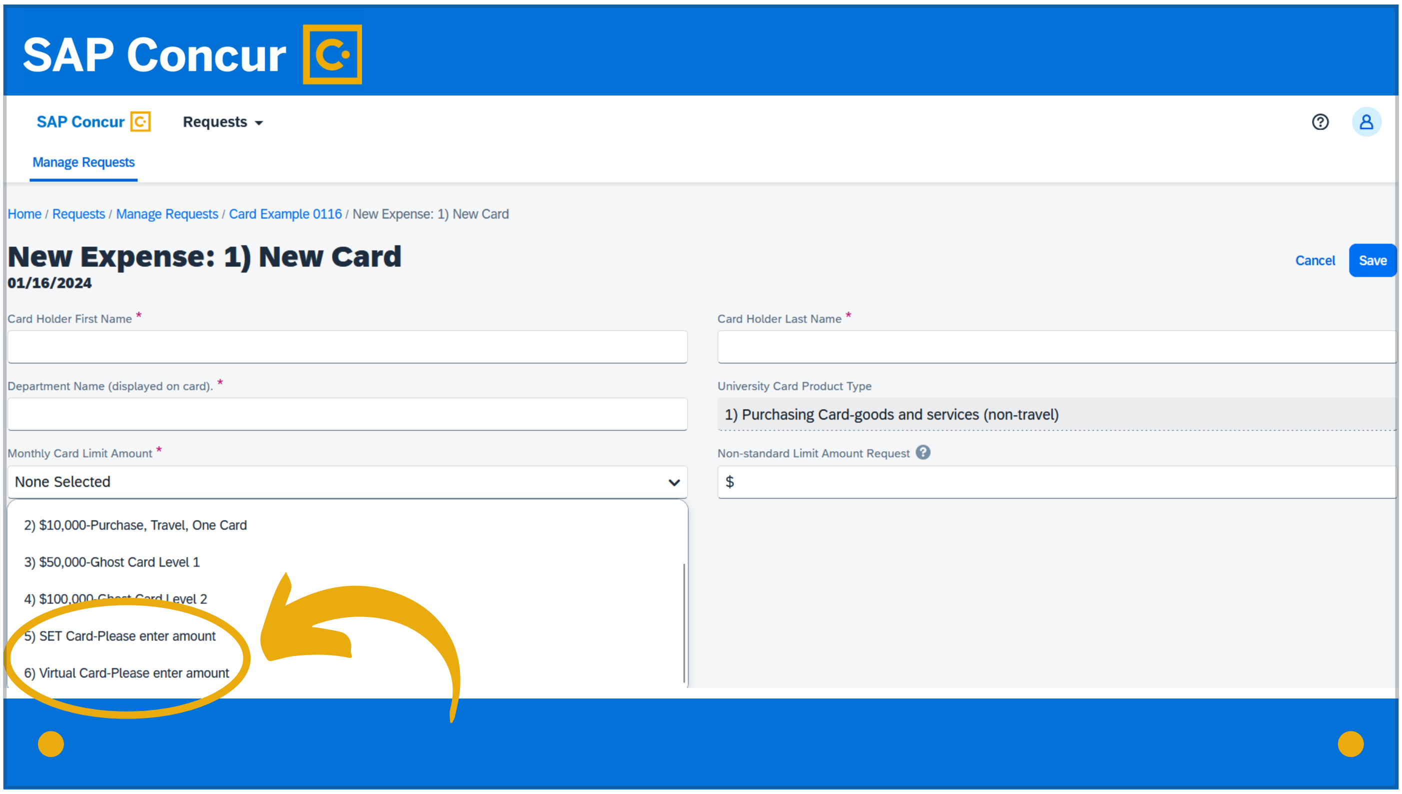
Even if you are requesting a non-standard limit, for the Monthly Card Limit Amount field still select the option that applies to the applicable card type.



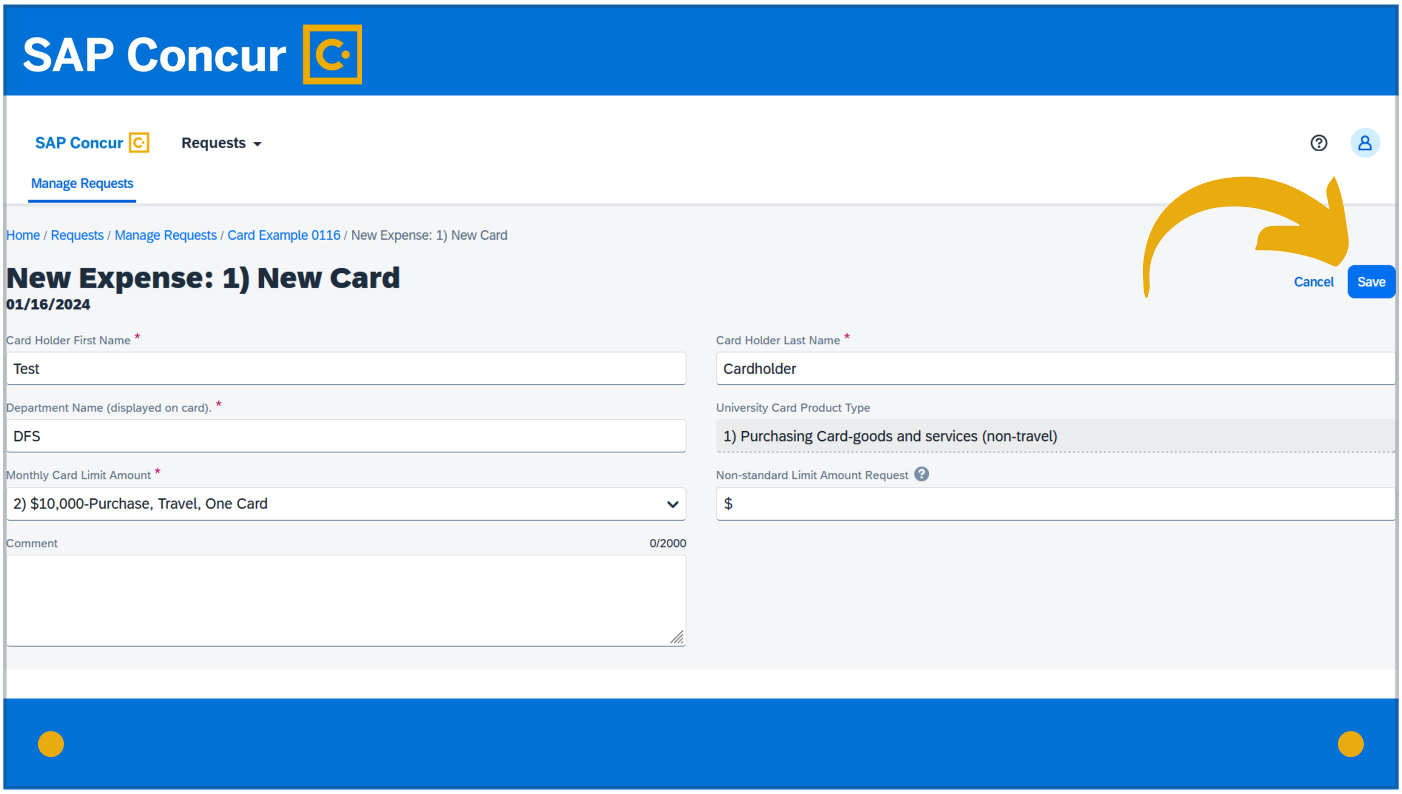
Then fill in the non-standard amount, so that both fields are complete.



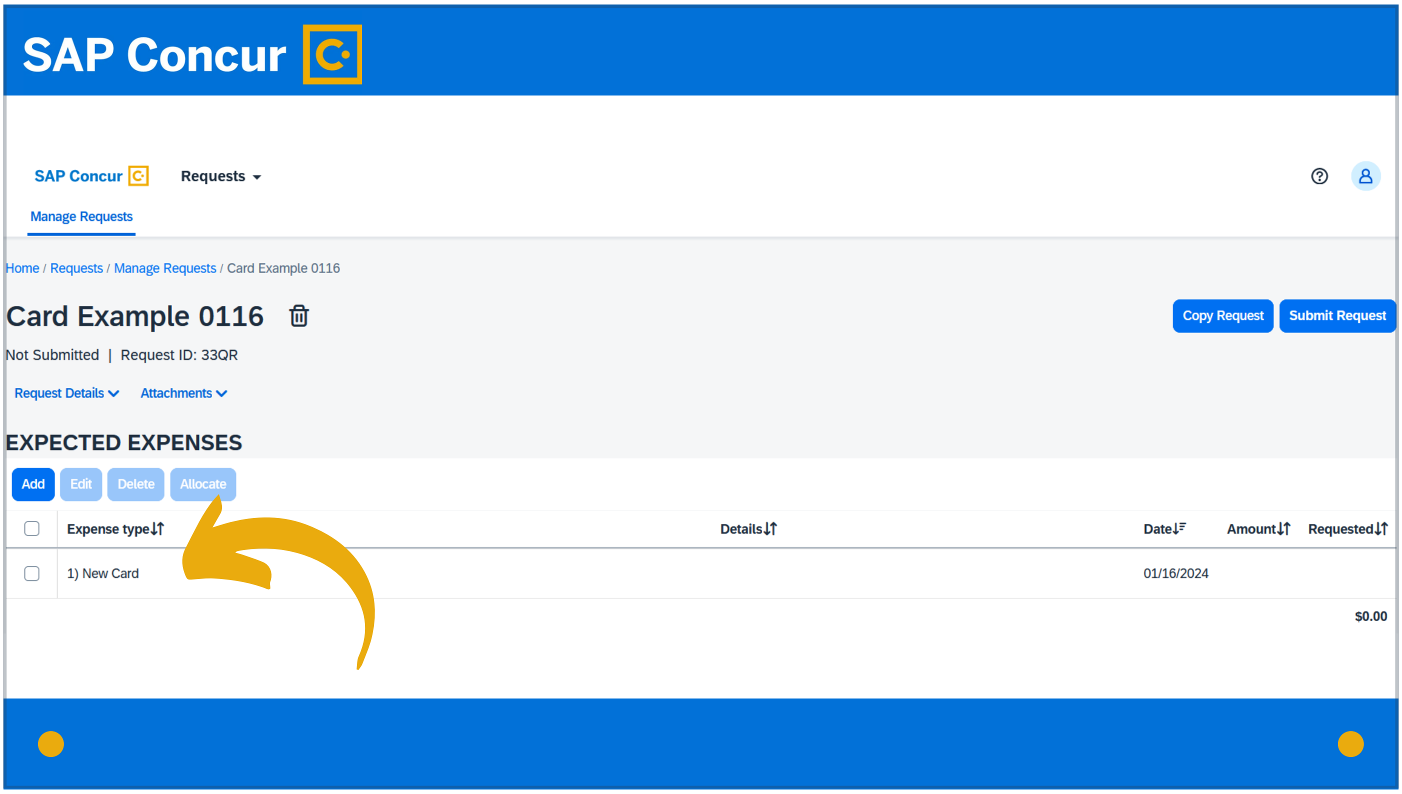
If you are not requesting a non-standard amount, it is important to leave this field blank



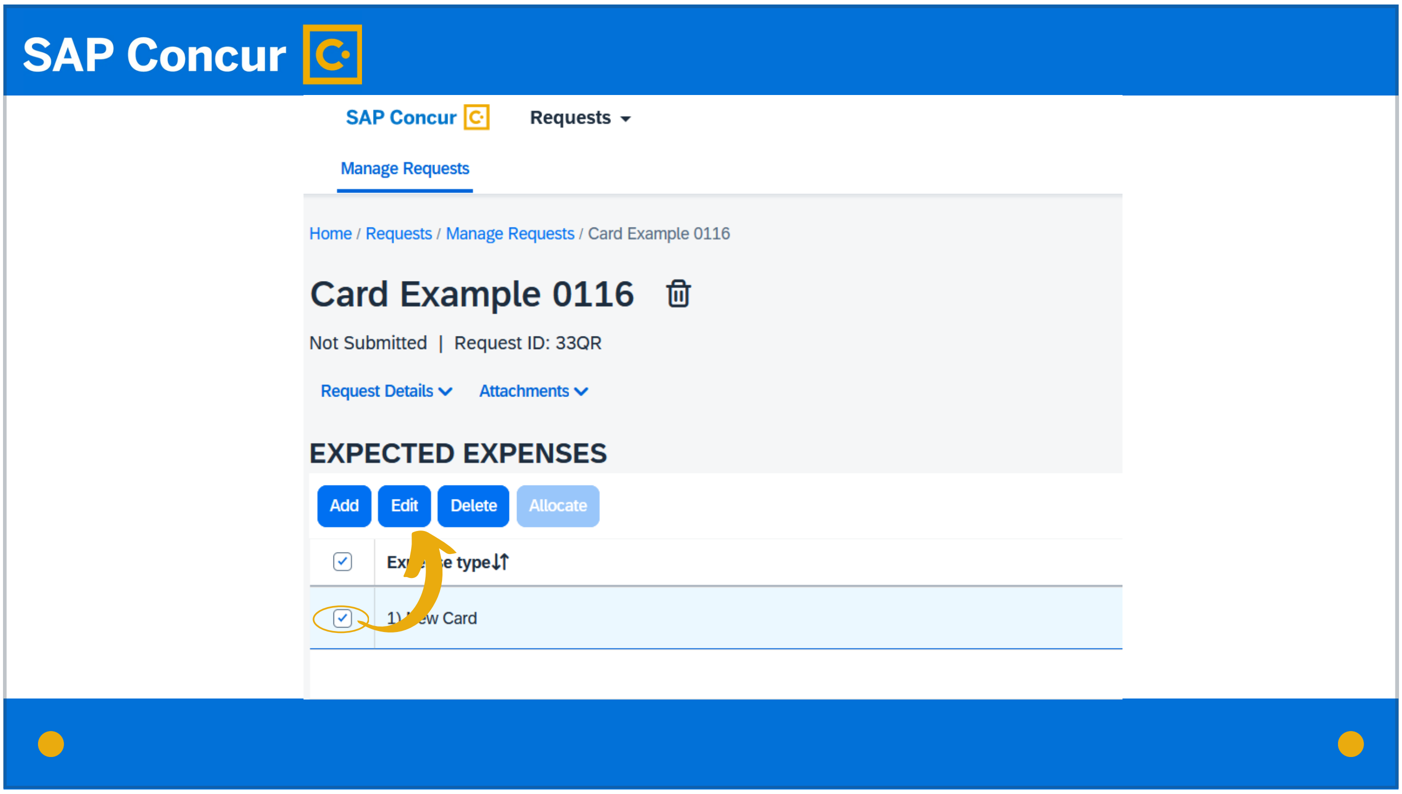
unless your card request is for a SET or Virtual Card and requires the amount to be entered.



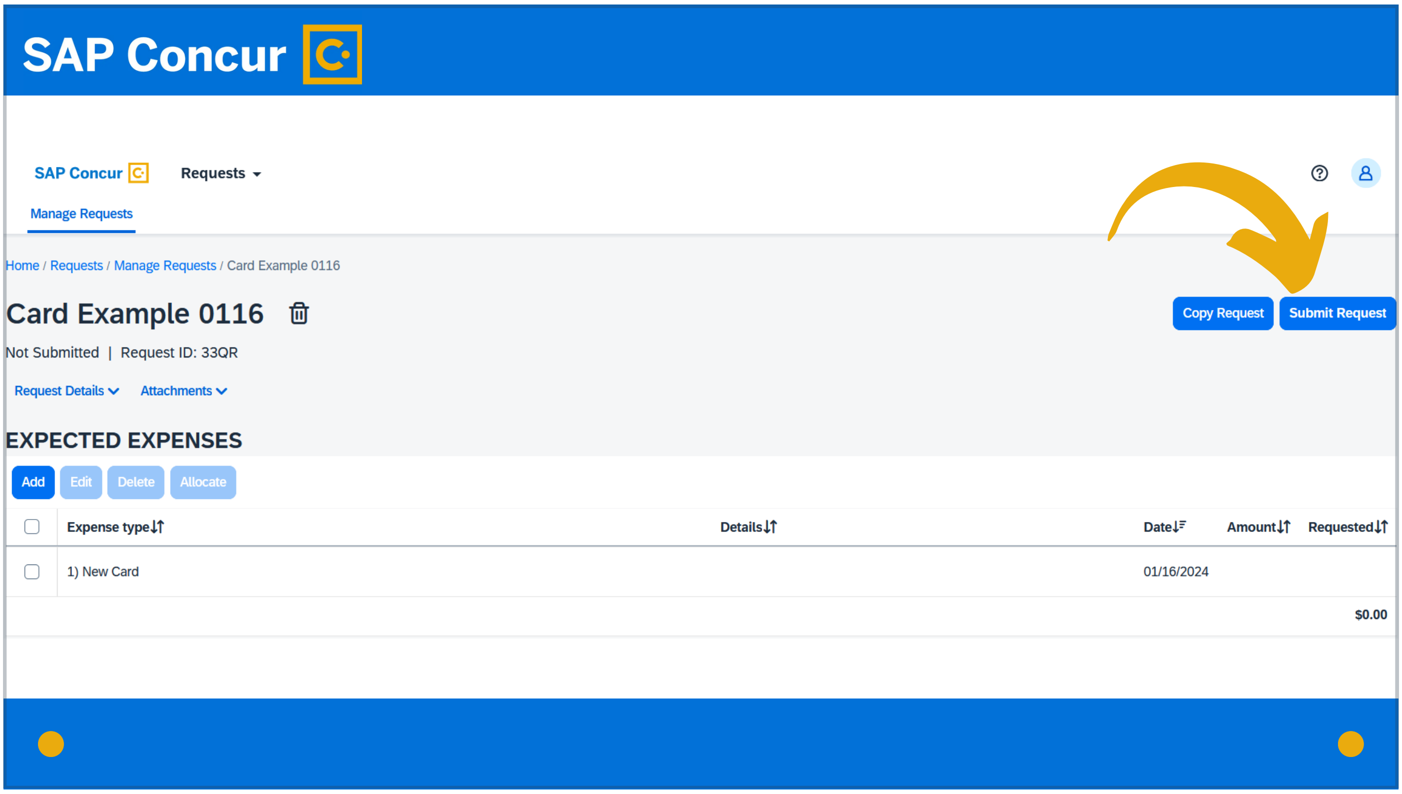
Once all required and applicable fields are complete, click Save.



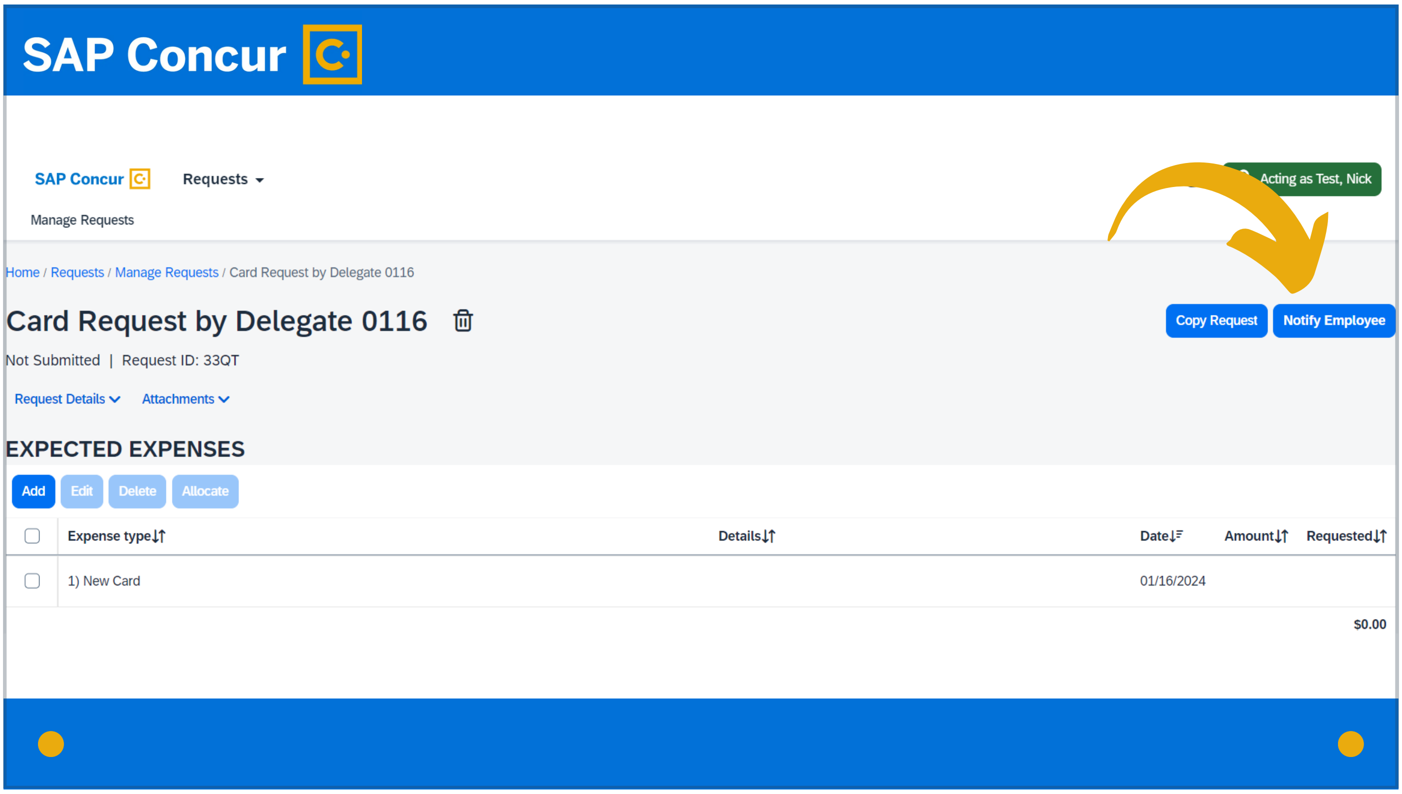
The card request will show under the Expected Expenses list.



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

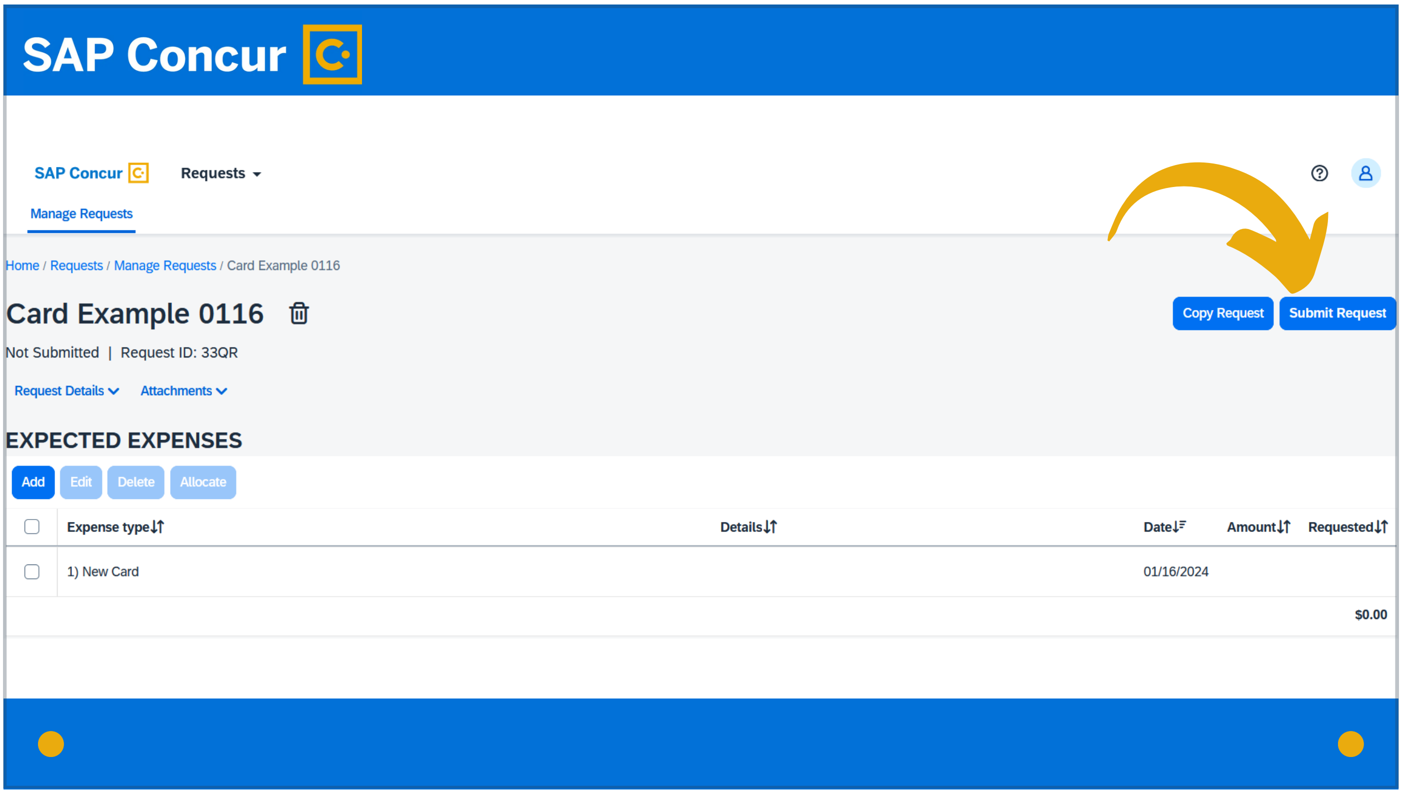


Once you are ready to submit the request, click Submit Request if you are the employee—

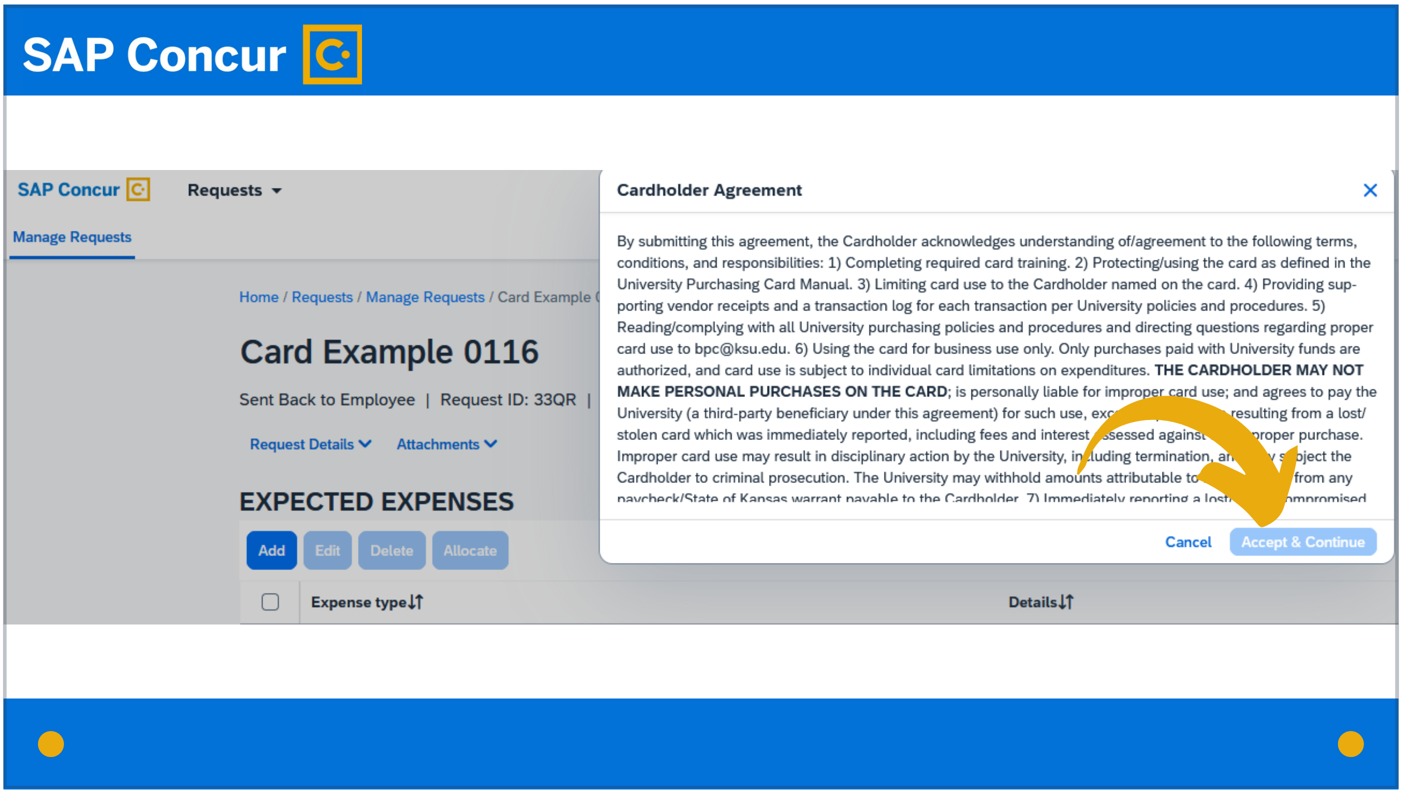


or, if you are the delegate for the employee, click the Notify Employee button at the top right of the screen.

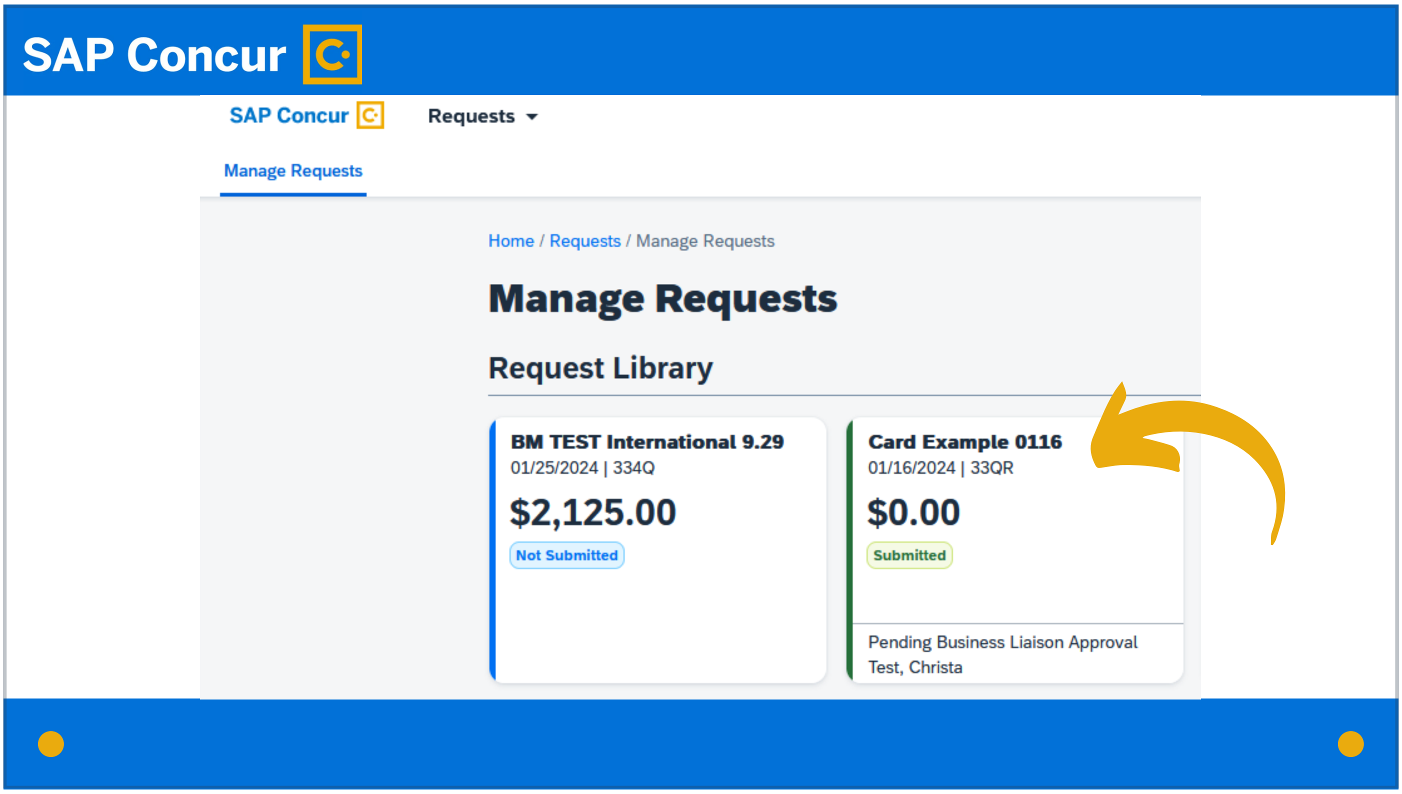
This will send an email to the employee that the request is ready to be submitted.



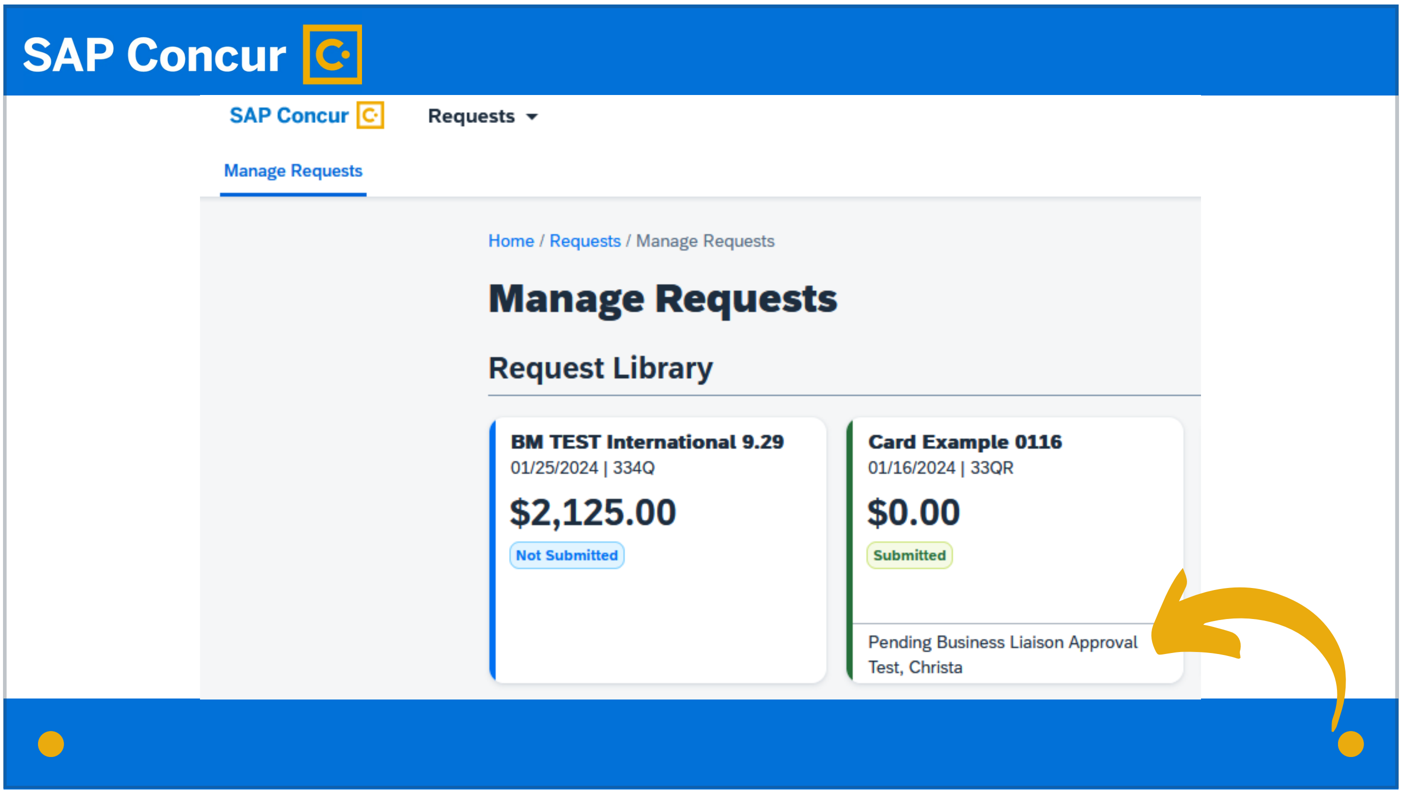
The employee has to be the person to submit the request; delegates can create requests on behalf of the employee but are not able to submit them because the employee has to be the person to agree to the Cardholder Agreement. This Cardholder Agreement will appear once the employee clicks the Submit Request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



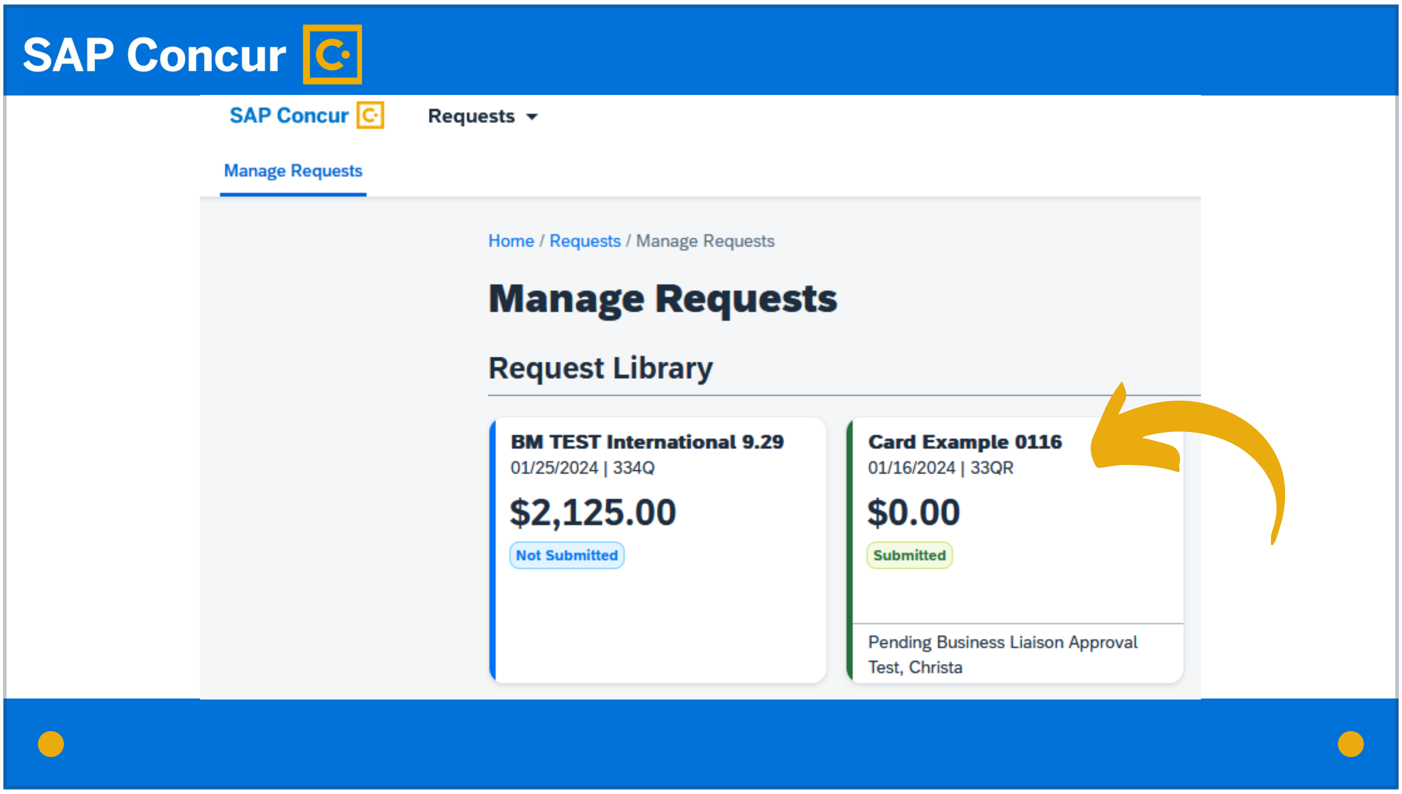
If you are the employee submitting the request, read the Cardholder Agreement to make sure you agree with and are aware of all points it refers to. If for any reason you do not agree and do not wish to continue, click Cancel to prevent the card request from being submitted. Otherwise, click the Accept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



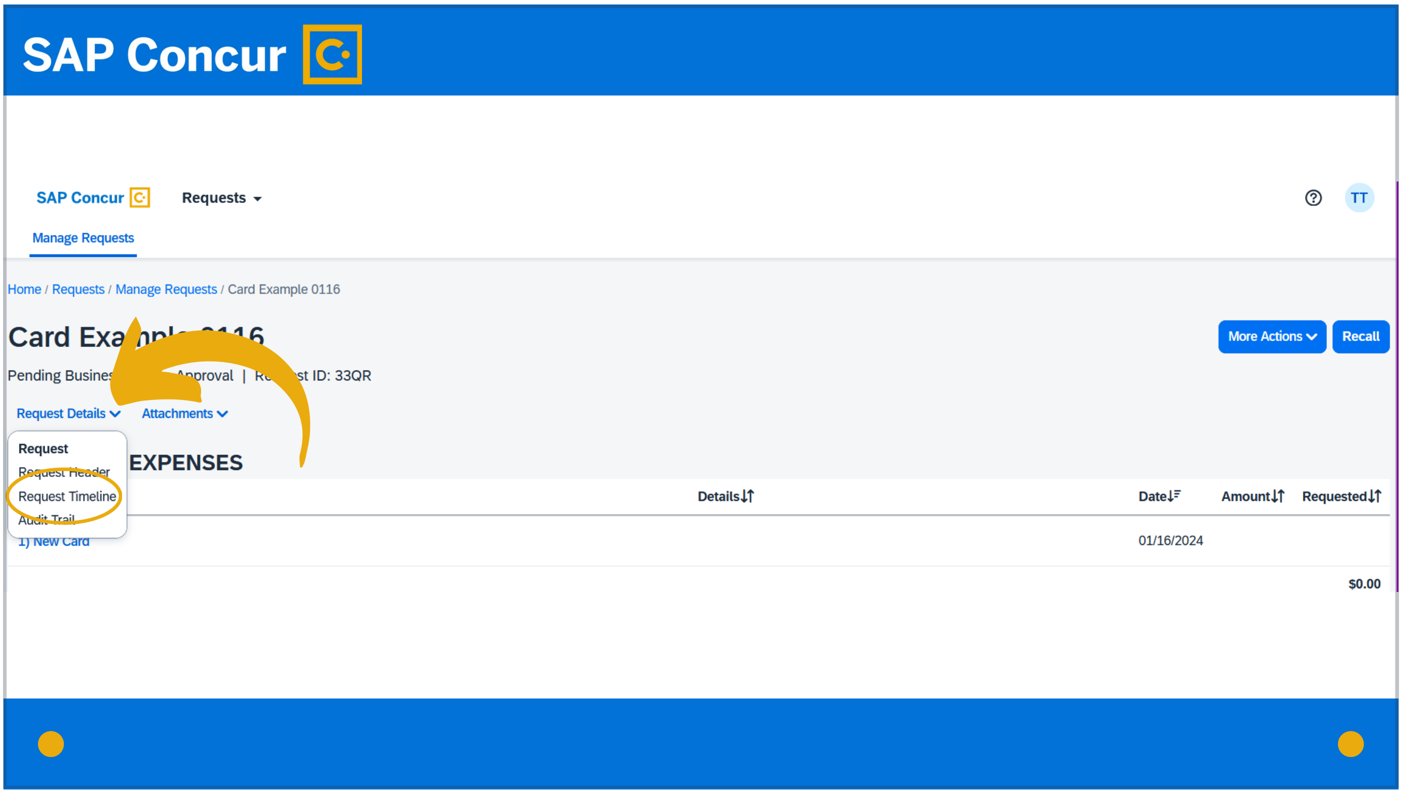
The request is now submitted and will show in your Request Library.



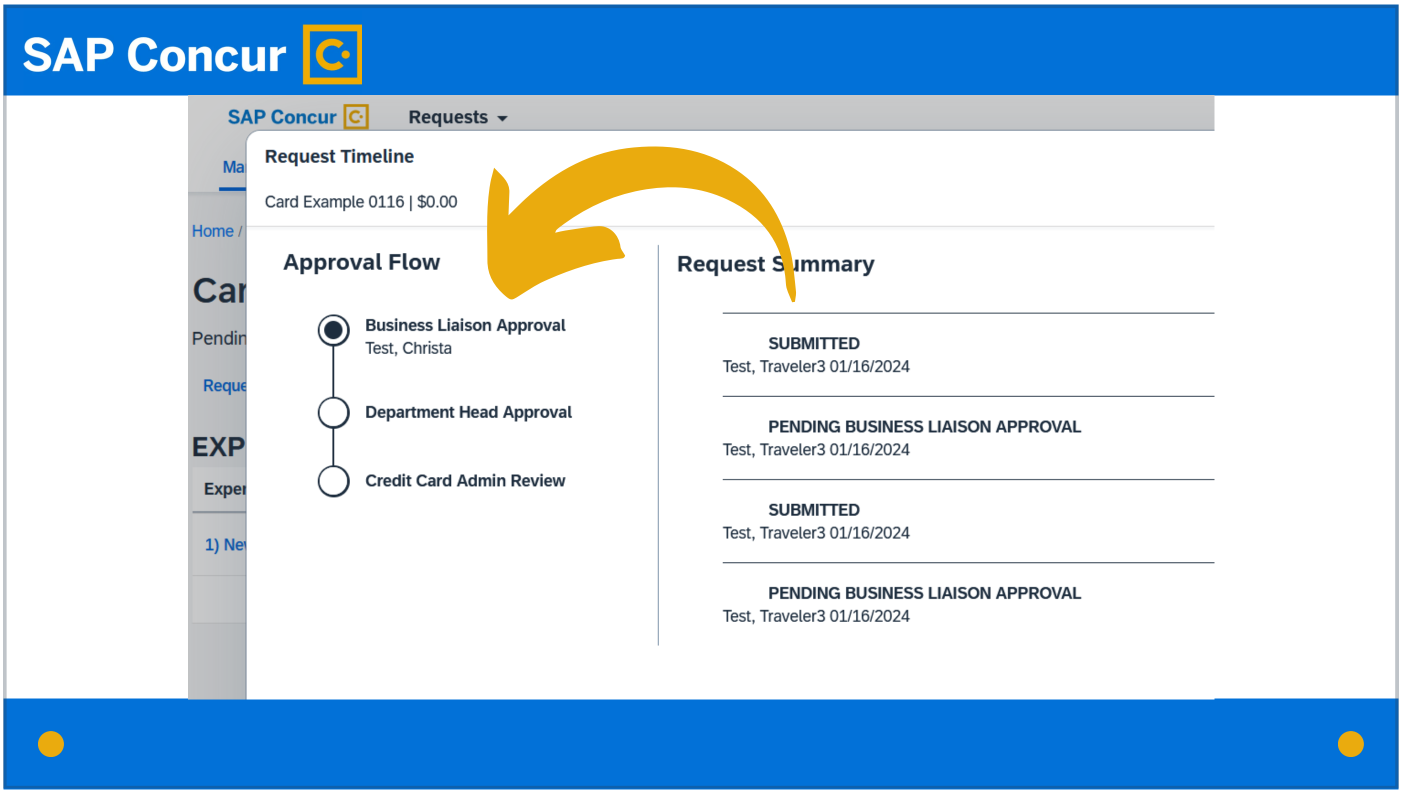
You can see at the bottom of the request box the current status. This status will update as the request moves through the approval process.



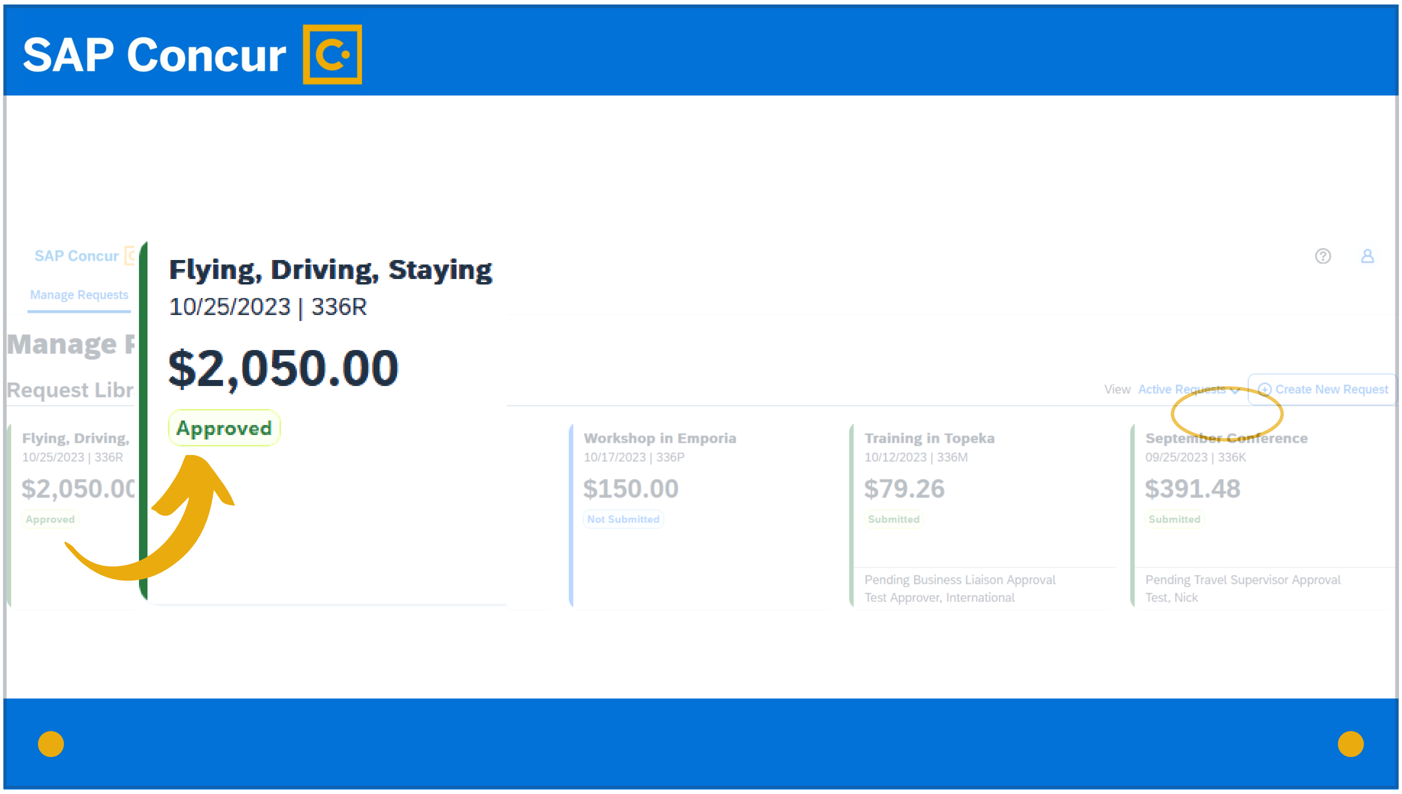
Additionally, if you click on the request box



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



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.



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