Signing In

Access to Concur is located within mySFA on the Resources Tab.

1. Login to mySFA
2. Go to the "Resources" tab
3. Select "Concur" in the Travel & P-Card section

Creating and Submitting Card Application

1. Click on Requests tab
2. Click on New Request
3. Request Policy dropdown field select "SFA-Card Application"

a. Report name: Last Name, Application Type (Doe, Travel Card Application)
b. Last 4 of SSN: Last four digits of your SSN
c. SFA PO Box: SFA department PO box
d. Per transaction limit: Select amount based on drop down selection
e. Per Cycle Limit: Max $20,000
f. Business Manager Name, Username: Name of Business Manager and mySFA username
g. Account Manager Name, Username: Name of Account Manager and mySFA username
h. Comment: add any notes related to your application that either approvers or Disbursement office should be made aware of.

4. Review application and Submit Request after reviewing the submit agreement

Card Application Submit Agreement

By submitting the card application, I understand that:
1. The application will be forwarded for review and approval.
2. The university issued card is the property of SFA and may only be used for official business purposes.
3. New cardholders must complete Procedures training or be current in their Refresher trainings prior to receiving a new card.

Cancel   Accept & Continue

Approvals-Supervisor/Department Head

SAP Concur has a built-in workflow to send the application to the Cardholder's Supervisor. Sometimes the supervisor and department head approvers are different individuals. In those cases, the Supervisor will approve & forward the application to the Department Head. Every application needs approval from the Supervisor & Department Head.

When reports are ready for review, an email notification will be sent to approvers.

Approvers may access reports in a variety of ways from the home page, or by using the link within the email notification. The approval page is home to all Concur approvals.

Clicking the **Approvals** tab or **Required Approvals** will direct approvers to the **Approvals** dashboard.
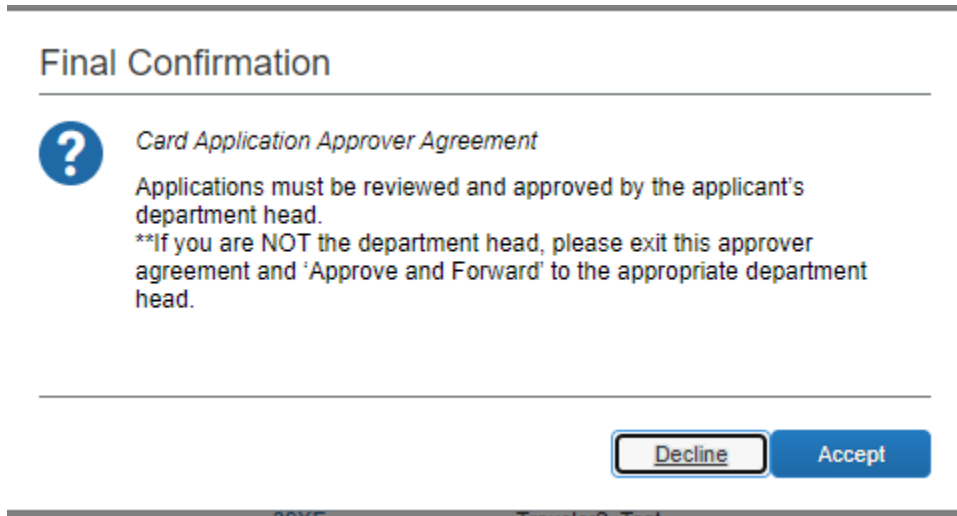
MY TASKS will all documents needing approvals.

From the **Approvals** dashboard click on the **Requests** tab. Each request that is ready for review will be listed. Once you have reviewed click on Approved.
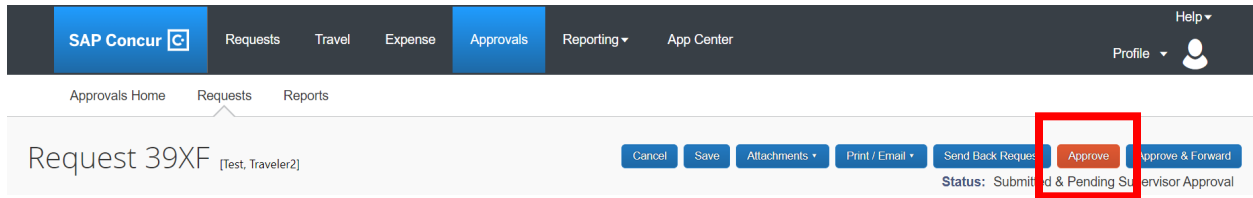
A Final Confirmation will appear, if you are not the department head please make sure to "Approve & Forward" to the appropriate department head

Forwarding for Additional Approval (Supervisors Only)

Supervisors have the ability to forward a p-card statement report for additional approval prior to moving on to the Financial Manager approval step of the workflow. Reports can only be forwarded to individuals with approver access: supervisors listed in the SFA Supervisor Hierarchy Maintenance table or financial managers.

1. Click **Approve & Forward**
2. Start typing the name of the additional approver in the **User-Added Approver** field
3. Select the approver
4. Add comments (optional)
5. Click **Approve & Forward**

Approve & Forward Report: ▰▰▰▰▰▰▰▰▰

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User-Added Approver:

Comment:

Approve & Forward   Cancel

6.