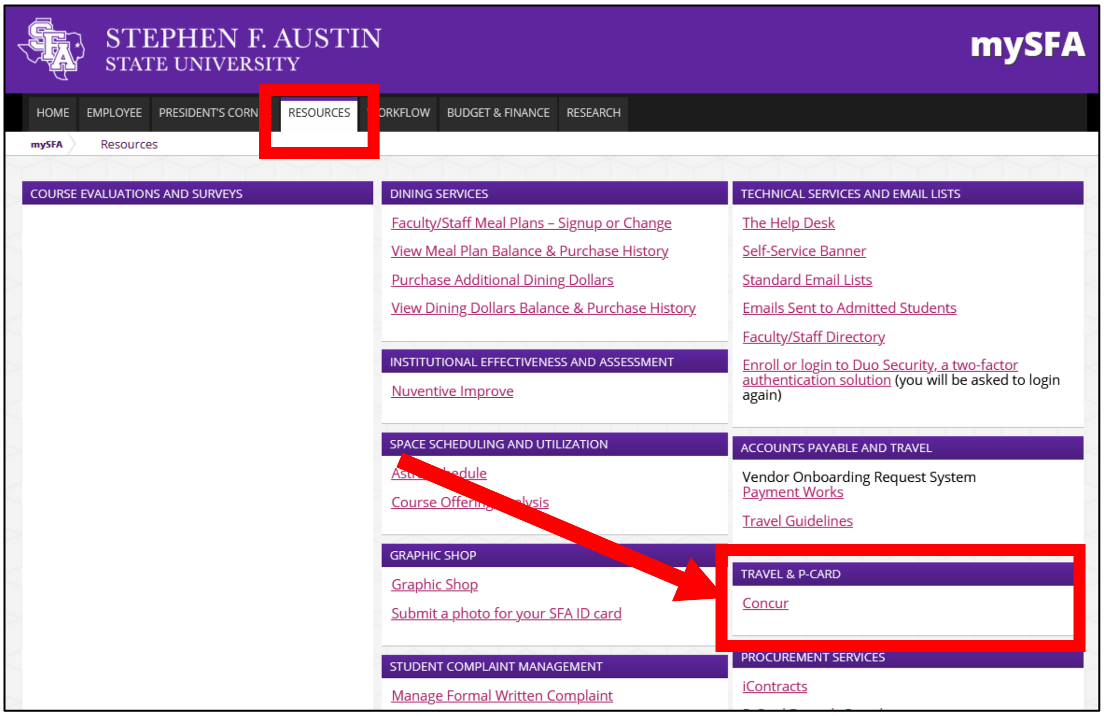
Signing In

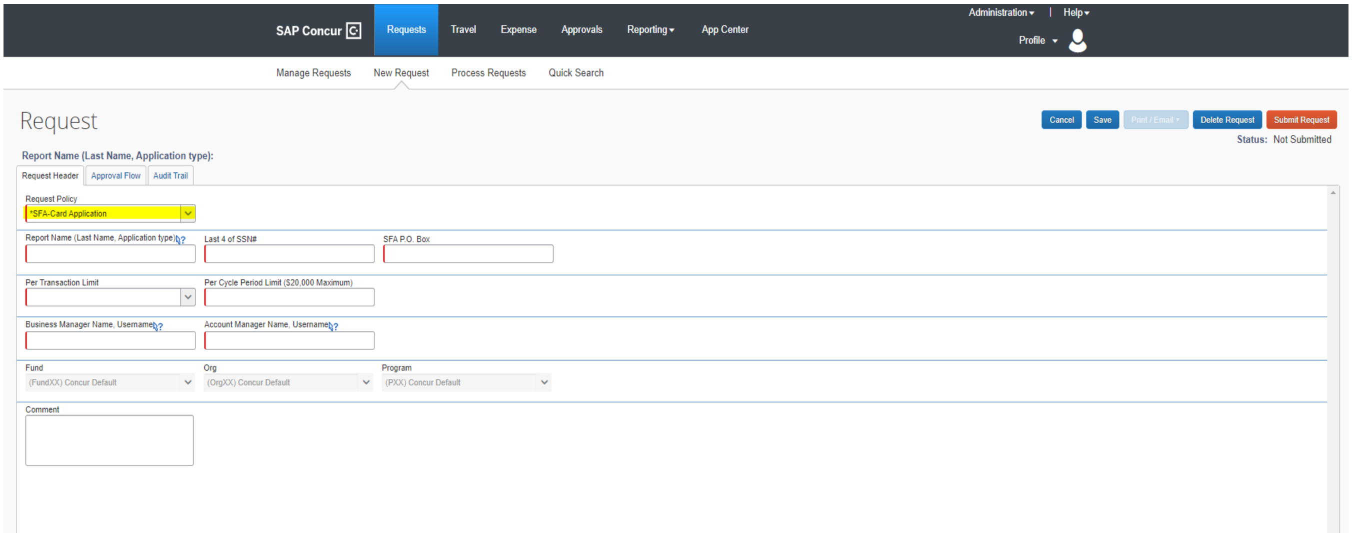
Access to Concur is located within mySFA on the Resources Tab.

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



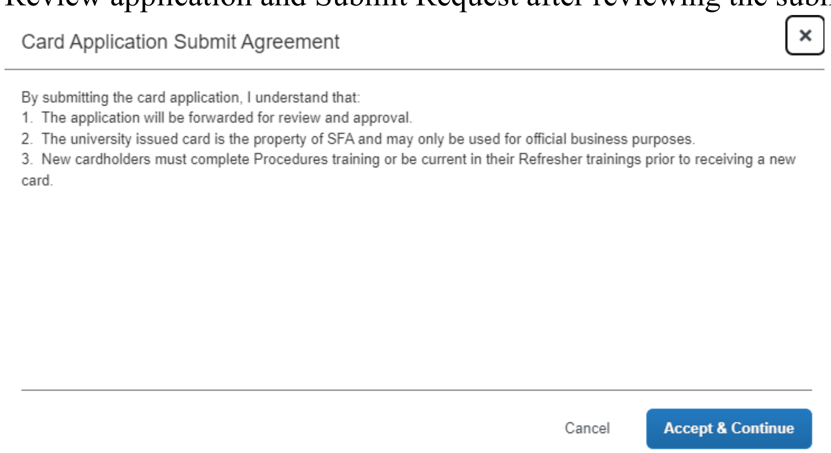
Creating and Submitting Card Application

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



Approvals-Supervisor/Department Head

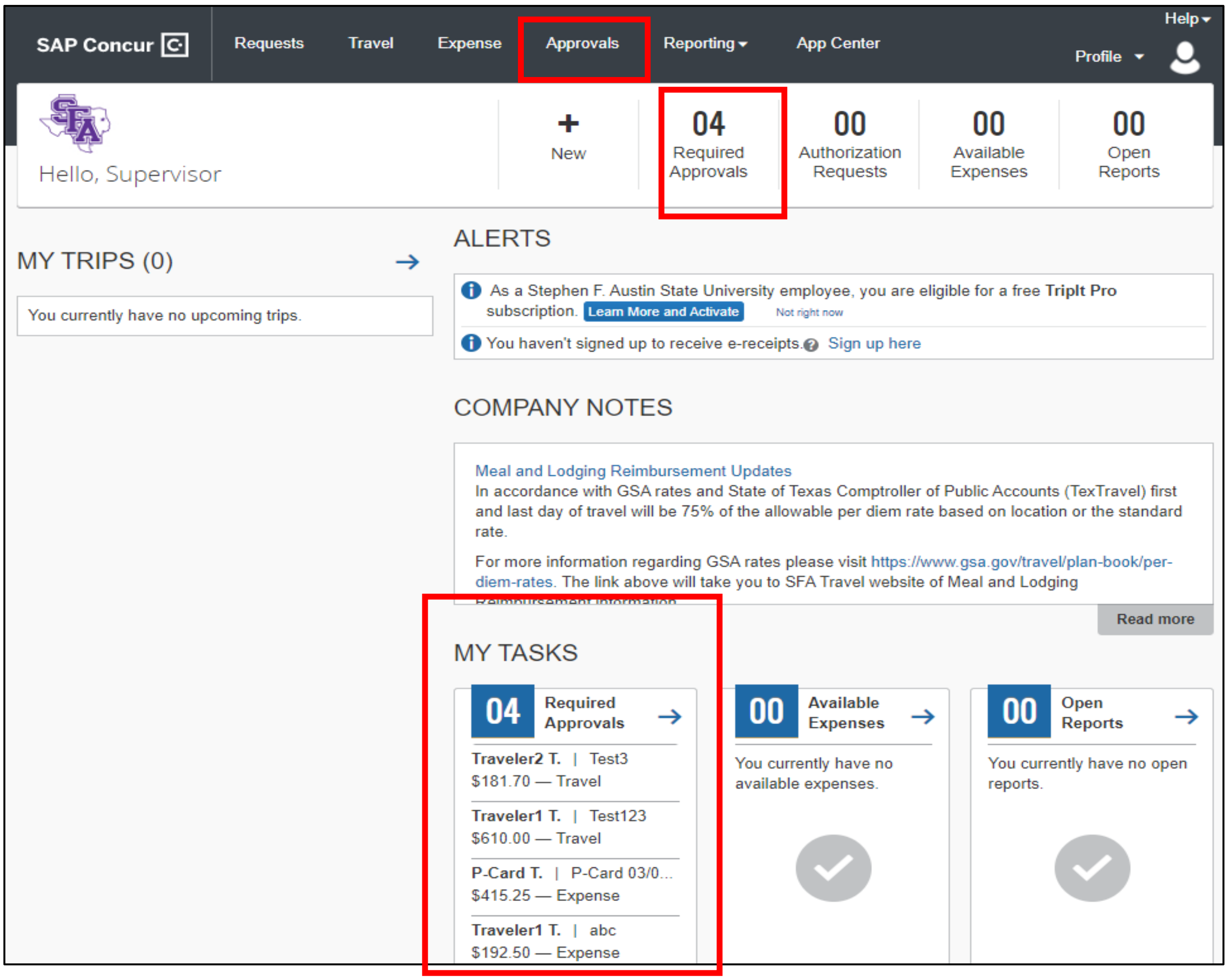
SAP Concur has a built-in workflow to send the application to the Cardholder's Supervisor. Sometimes the supervisor and department head approvers are different individuals. In those cases, the Supervisor will approve & forward the application to the Department Head. Every application needs approval from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

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

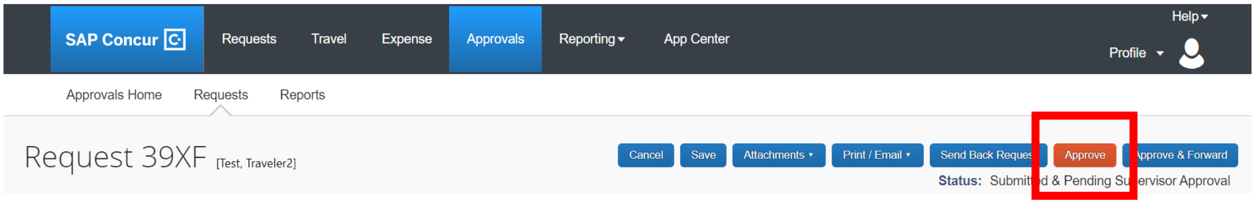
Approvers may access reports in a variety of ways from the home page, or by using the link within the email notification. The approval page is home to all Concur approvals.

Clicking the **Approvals** tab or **Required Approvals** will direct approvers to the **Approvals** dashboard.

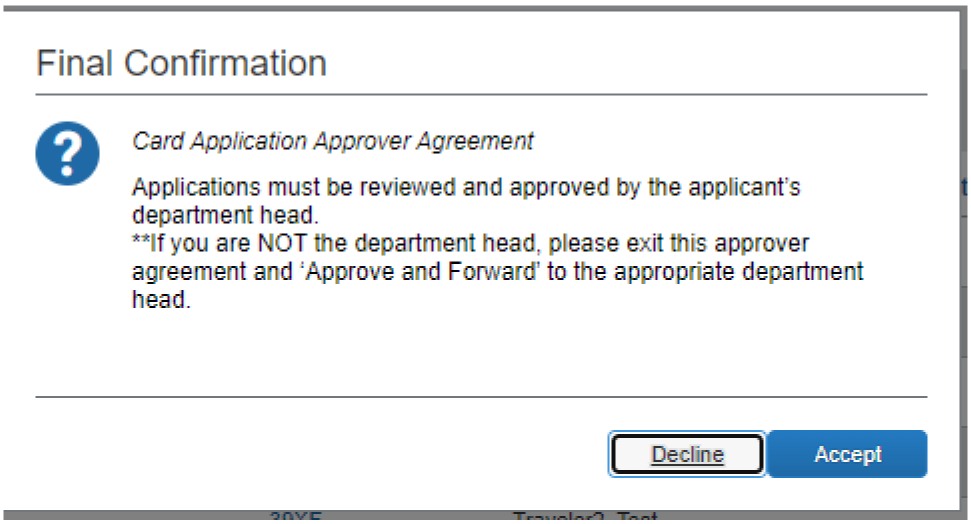
MY TASKS will all documents needing approvals.



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

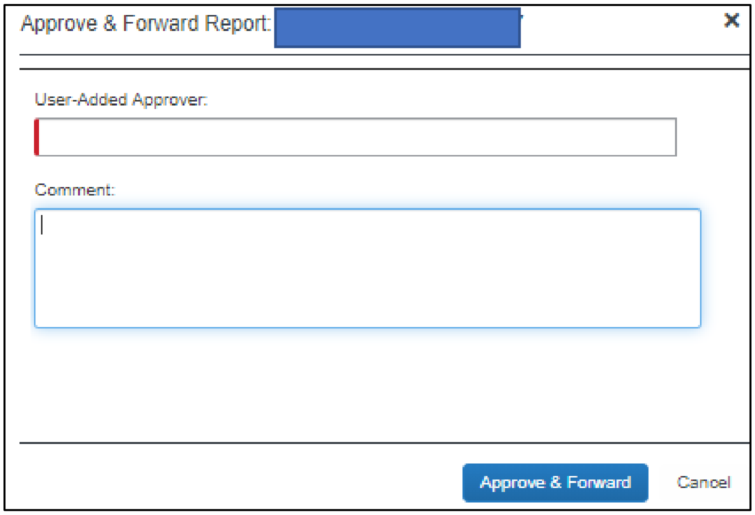


Forwarding for Additional Approval (Supervisors Only)

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**

6.


Approve & Forward Report: [redacted]
User-Added Approver:
Comment:
Approve & Forward
Cancel