

Quick Reference Guide How to Request a New Card in Concur Concur Travel & Non-Travel

HOW TO REQUEST A NEW CARD IN CONCUR

Requesting a new card is easy and streamlined in Concur. To request a **BU OneCard**, follow the steps below.

1. Log into Concur. From the home page, click on + Create and select Start a Request.

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		Authorization Requests	3 Available Expenses	20 Expense Reports	

2. In the Create New Request window, select "Card Services Request" from the Request Type list.

Request Type *		
*TEST Card Services Request		
Request Name *	Request Date *	S Card Service Request Type *
TEST	MM/DD/YYYY 💾	Search by Text
		This field is missing required information.
Cost Object * 1	Cost Object Approver Name * 2	01. New Card Request
(1060260000) Procure to Pay (P2P) X V	~	02. Update Existing Card
Comment		03. Cancel/Close/Replace Existing Card
		04. Cash Advance Request

- 3. Enter all required information in the Request Header
 - a. Request Name
 - b. Request Date (current date)
 - c. Card Services Request Type: New Card Request
 - d. Cost Object: use your home, unrestricted cost center; do not enter a restricted account such as a grant or sponsored program
 - e. Cost Object Approver Name: select from the drop-down list
- 4. After completing all required information, select "Create Request" in the bottom right corner.





5. Once you have created the request, you must add details to it. Within the "Manage Requests" window, select the Request and click the **+Add** button.

Homa / Requests / Manage Requests / TEST	
TEST	Submit Request Delete Request
Not Submitted Request ID: 3DDG	
Request Details ✓ Print/Share ✓ Attachments ✓	
EXPECTED EXPENSES	G Add Edit Delete Allocate

6. Among the available University Card Requests options, select **New University Card Request**.

Add expected expenses and/or travel plans	×
Search by expense type, category, description Q Collapse All Sections	_
01. New University Card Request	
02. Permanent Change Limits	
03. Temporary Change Limits	
04. Override Request	
05. Suspend/Reinstate	
06. Name Changes	
07. Campus Location Address Update	
08. Close/Cancel	
09. Replacement/Worn Card (retain same card #)	
10. Business Unit/Department Update	
11. Cash Advance Request	



7. Complete all required fields in the request and click Save.

Note:

- Card Purpose/Usage the card you request and receive is determined by your business needs (Travel, Purchasing, or Purchasing + Travel)
- Single Transaction/Cycle Limit card type must match the Card Purpose/Usage selection
- You are required to select the check box next step "I will complete training emailed to me after request approval" (See step 10 for more information)

New Expense: 01. New University Card Request			
U User ID *			Required field
cu11			
Card Service Request *	Effective Date *		
01. New Card Request	06/06/2025	Ë	
Jser Legal First Name *	User Legal Middle Name/Initial	User Legal Last Name *	
Clone		User11	
Campus Address 1 *	Campus Address 2	Campus City *	
Campus State *	Campus Zip Code *	Campus Phone *	
	~		
Card Purpose/Usage *	Single Transaction/Cycle Limit *	V I will complete trai	ning emailed to me after request approval. *
Business Justification/Comment			0/2000

8. After you click **Save**, you will be brought to the Request page where you can add additional details (click +Add and complete applicable fields) or submit your request.

TEST	Submit Request D
Not Submitted Request ID: 3DHJ	
Request Details V Print/Share V Attachments V	
EXPECTED EXPENSES	🕞 Add Edit Delete

9. Click **Submit Request** once complete. You will be required to **review and agree to the cardholder agreement** before the request is sent for approval.

BOSTON UNIVERSITY "U.S. Bank BU OneCard" Cardholder Agreement	×
b. I must promptly submit receipts and expense reports. All card-related records are BU property and subject to audit.	
6. If I misuse the card, I authorize BU to deduct from my salary or any other amounts payable to me an amount equal to the improper purchases or unused cash advances, even if I am no longer employed by BU. Cash ad- vances are only allowable for the purposes of travel.	
 Understand misuse may result in card revocation and disciplinary action, up to and including TERMINATION OF EMPLOYMENT. BU may pursue all applicable legal remedies. If BU initiates legal proceedings to recover funds, I agree to pay legal fees and costs, including appeals. BU may revoke card privileges at any time without notice. I agree to return the card upon request, resignation or department transfer. 	
l agree to accept responsibility for the protection and proper use of the card, as noted above.	ļ

10. Once the request is sent and your application is approved by the financial approver, you will receive an automated email that includes the **BU OneCard** policy, mandatory training questionnaire, and instructions to activate your card. Training must be completed before your card can be issued.