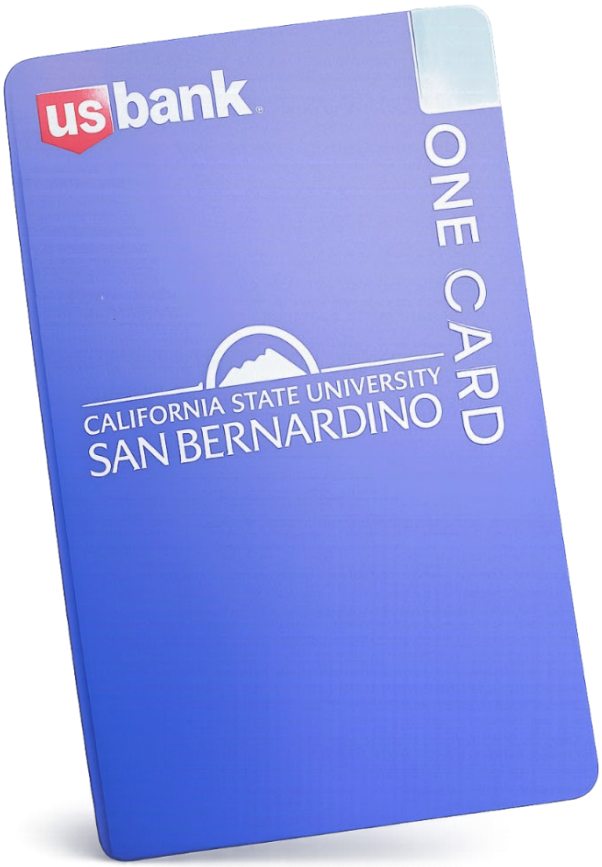
CSUSB Universal Card

Concur User Guide – Credit Card Service Request



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CREDIT CARD SERVICE REQUEST

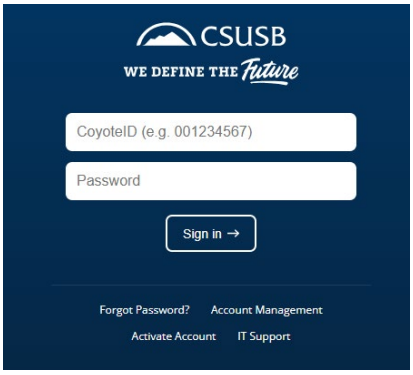
Logging into Concur

Note: The screen captures included in this document may look slightly different on-screen due to user interface changes made by campus.

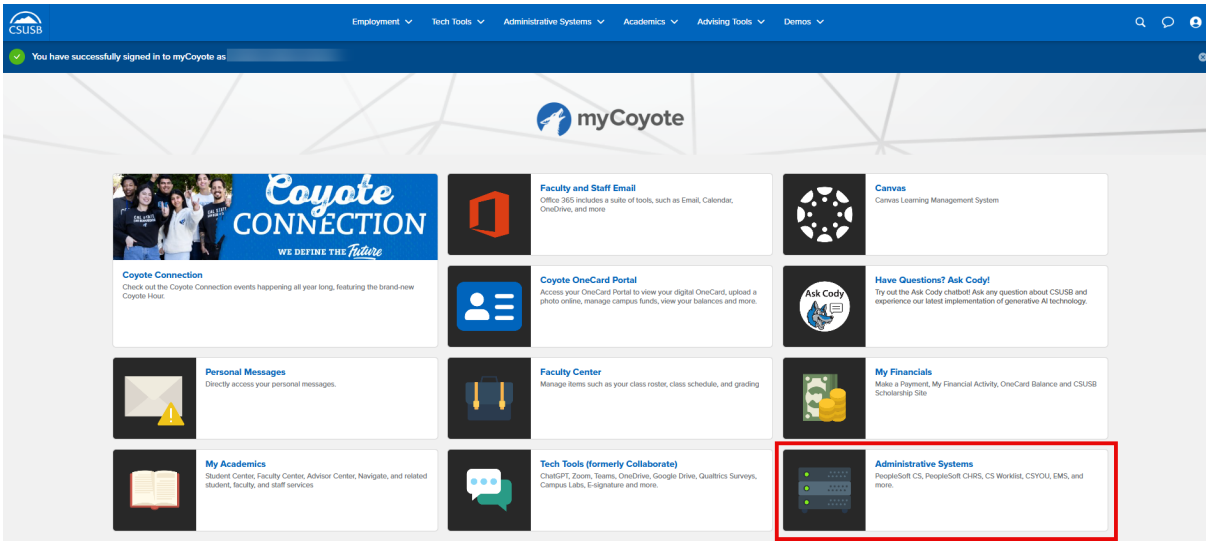
1. Navigation: Go to **CSUSB.edu** and click on **myCoyote** in the upper right-hand corner of the main CSUSB website.



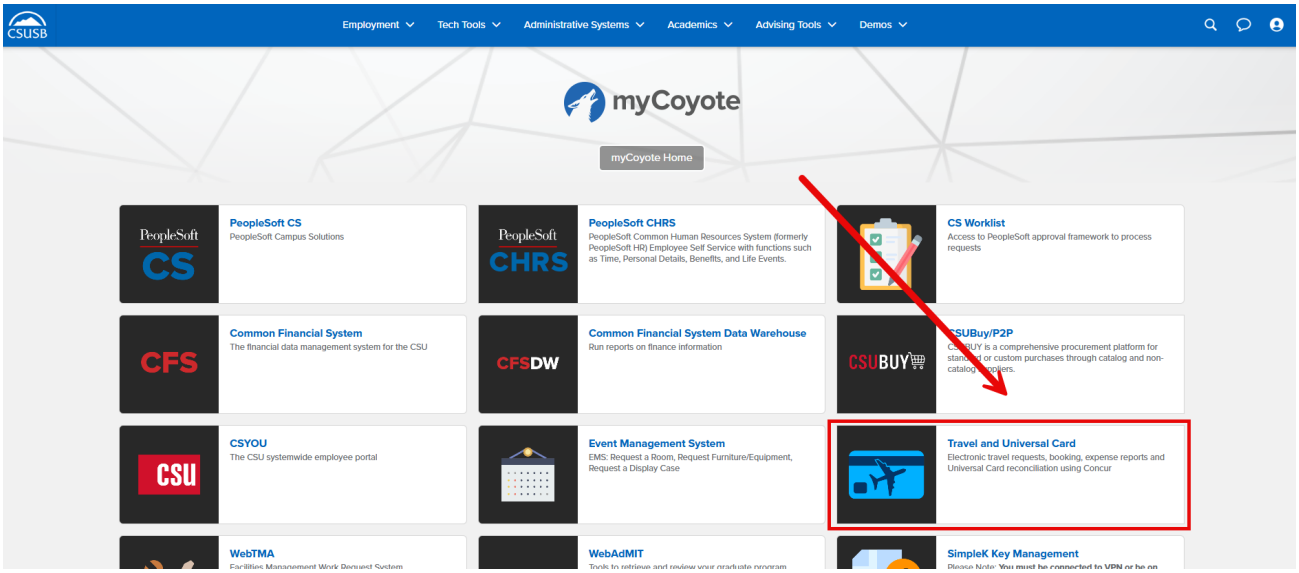
2. Sign in using your Single Sign On.



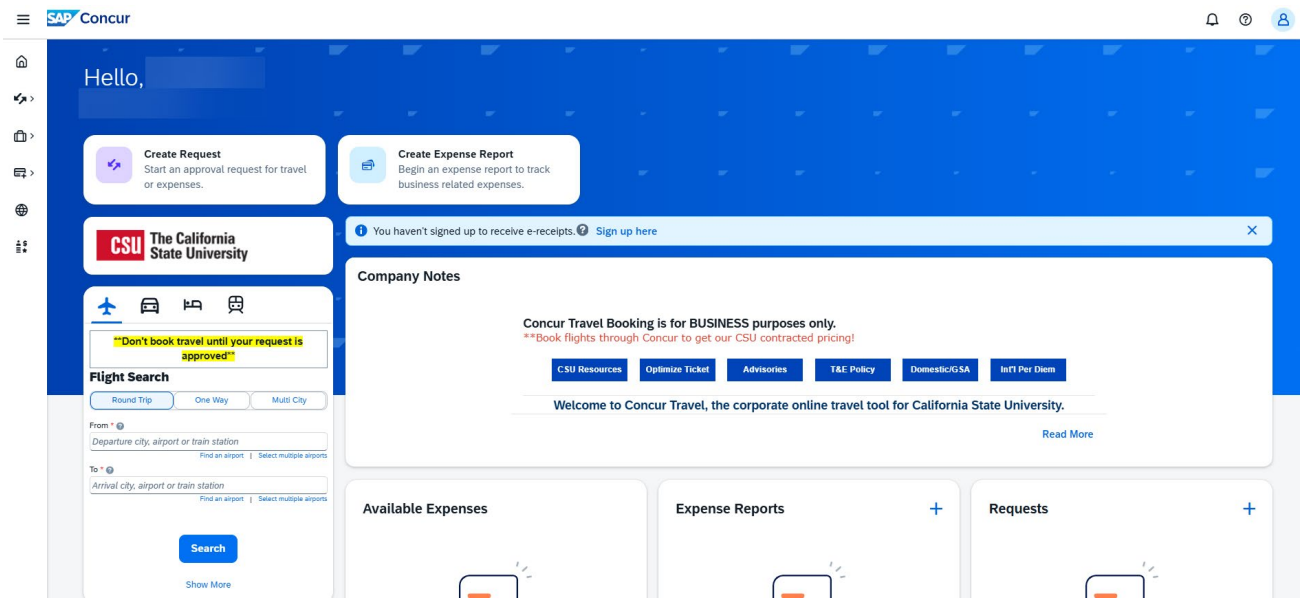
3. Click on the **Administrative Systems** tile.



4. Click on the **Travel and Universal Card** tile. You will be signed into Concur.



5. Once you have logged into Concur, you will be on the main landing page.



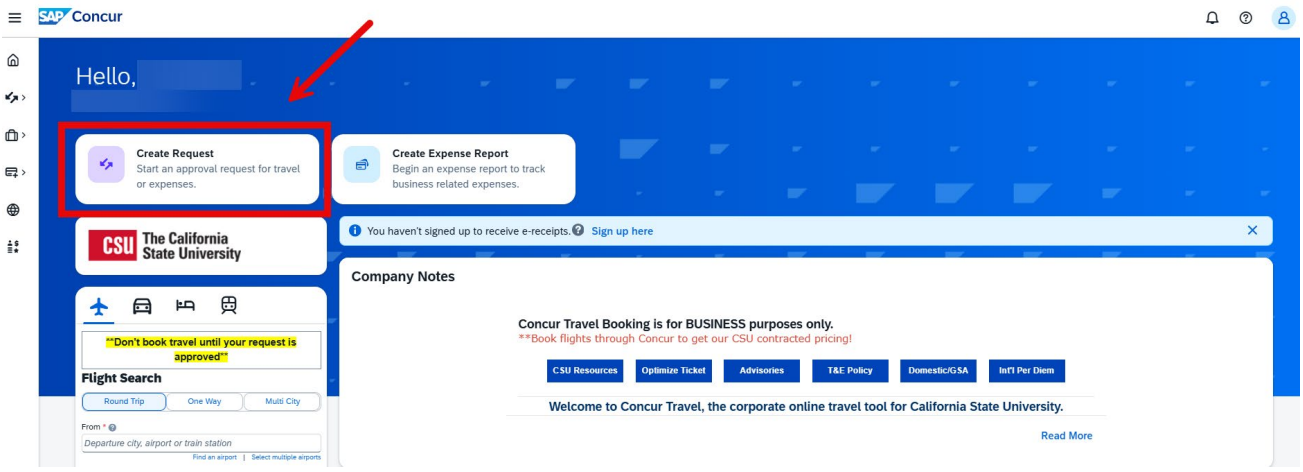
Creating a Credit Card Service Request

Before completing a credit card service request, review and ensure you understand the Universal Card Handbook. For questions or additional guidance, reach out to UniversalCard@csusb.edu.

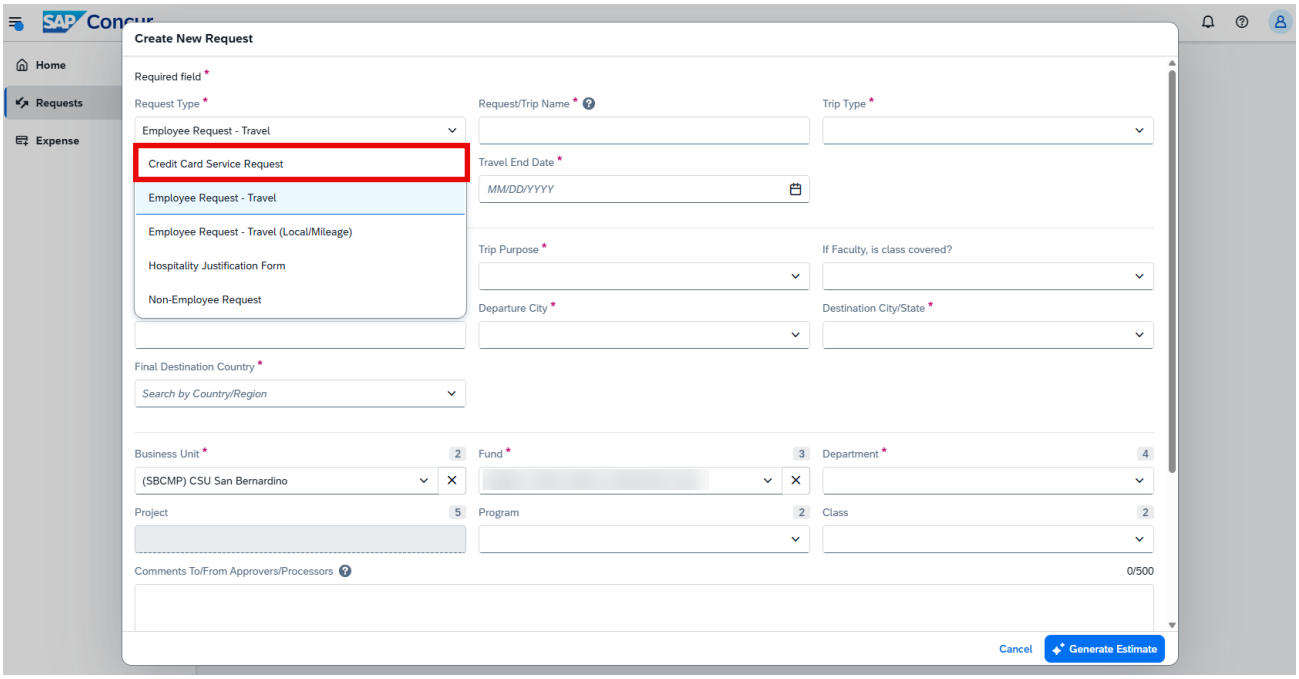
Note: The screen captures included in this document may look slightly different on-screen due to user interface changes made by Concur.

Request Header

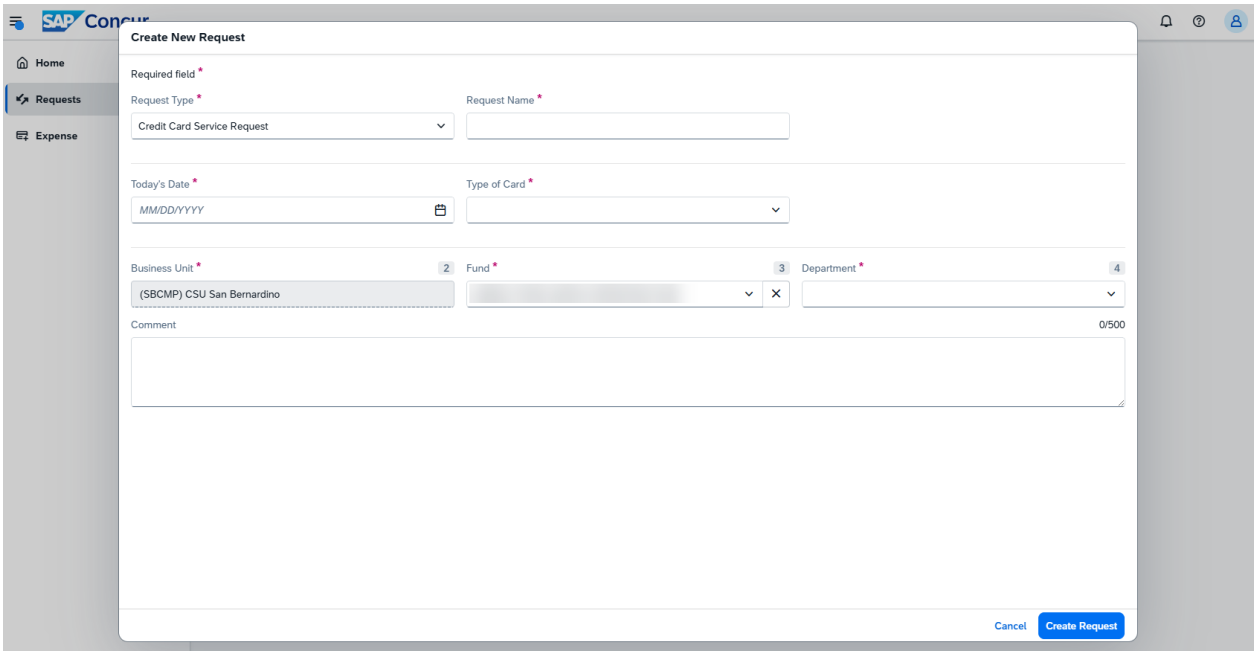
1. From the **Home** page, click **Create Request**.



2. In the **Create New Request** window, click the drop-down in the **Request Type** field and select **Credit Card Service Request**.



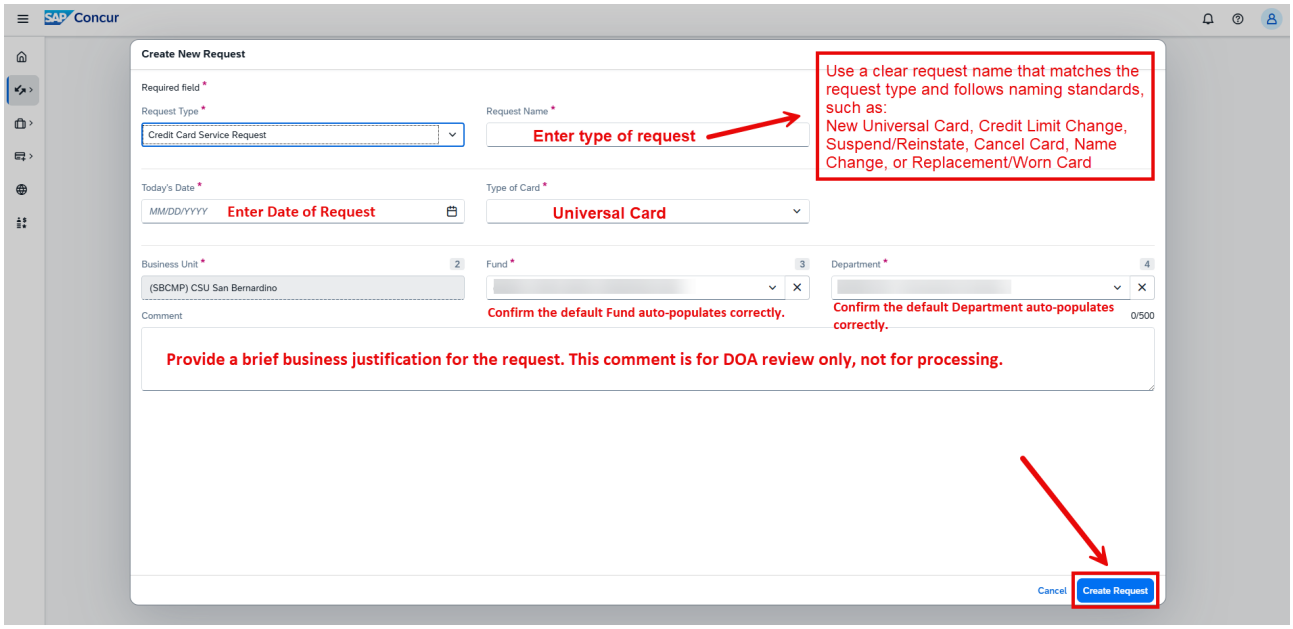
3. The **Request Header** fields for the Credit Card Service Request display. Complete the Request Header details. All fields identified with an asterisk (*) are required.
   a. Request Layout



   b. Review and complete all required fields (*) and any optional fields, as desired.

Field Name	Description
Request Type *	Automatically populates from the previous step when **Credit Card Service Request** is selected.
Request Name*	Enter a meaningful request name that clearly indicates the type of request being submitted. Use the required naming conventions (e.g., New Universal Card, Limit Change, Suspend/Reinstate, etc.).
Today's Date*	Select the Current Date.
Type of Card*	Select the option **Universal Card**.
Business Unit*	The Business Unit is automatically populated from the CHRS database based on the employee's primary business unit and cannot be modified.
Fund*	The Fund field is automatically populated from CHRS based on the employee's primary record.
Department*	The Department field is automatically populated from CHRS based on the employee's primary record.
Comment	Provide a brief business justification for the request. This comment is for DOA review only, not for processing.

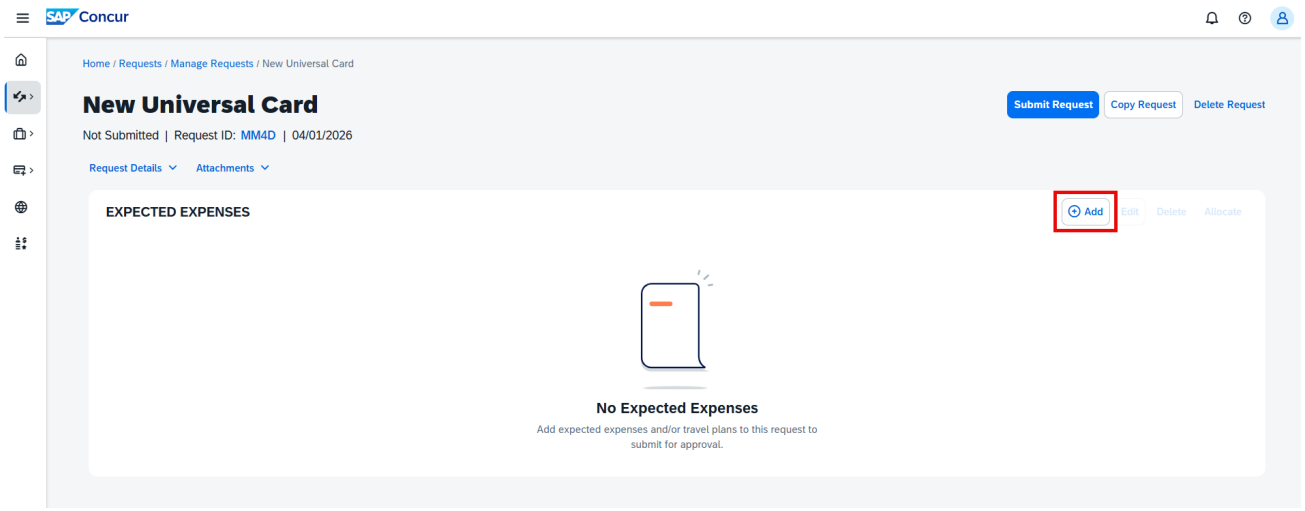
4. After completing all relevant fields, select **Create Request**.



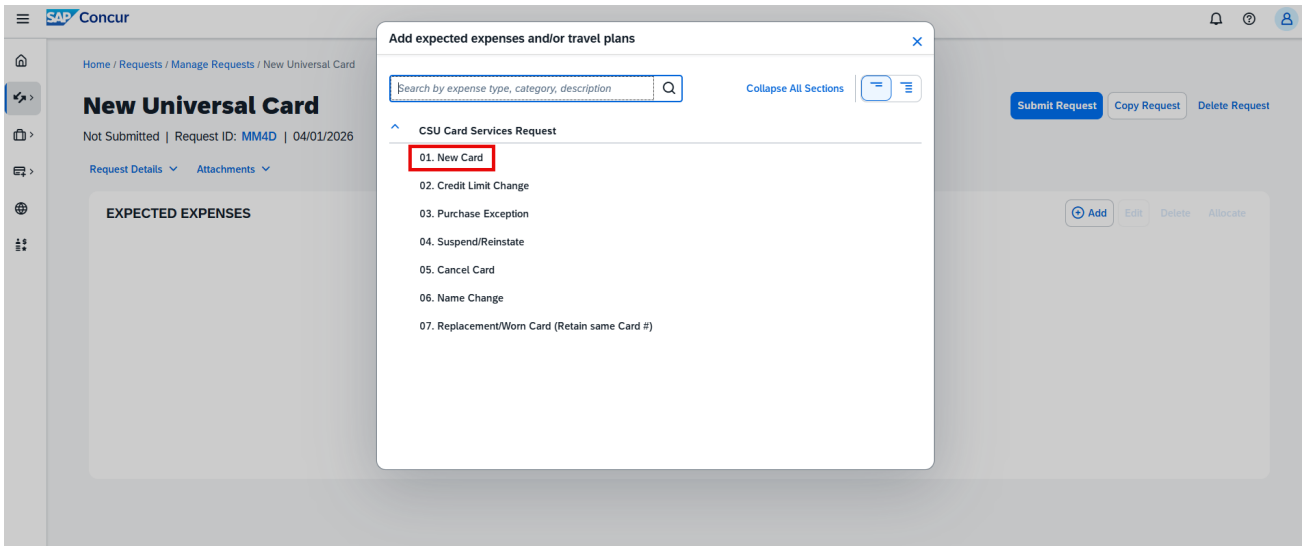
Adding Card Service to Request – 01. New Card

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality of adding services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



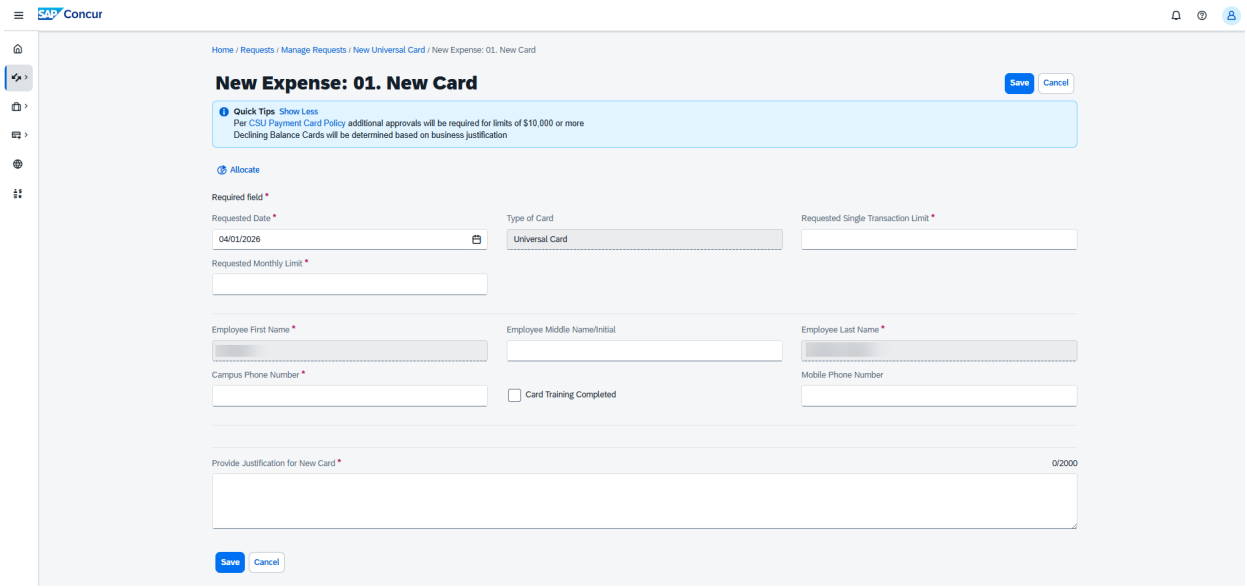
2. Select **01. New Card** for your request.



3. The **New Expense** form for the selected service displays (e.g., New Card).

   Note: The form fields will differ based on the card service selected.
   Quick Tips (provided in blue) display important information related to the details being requested.

   a. Request Layout

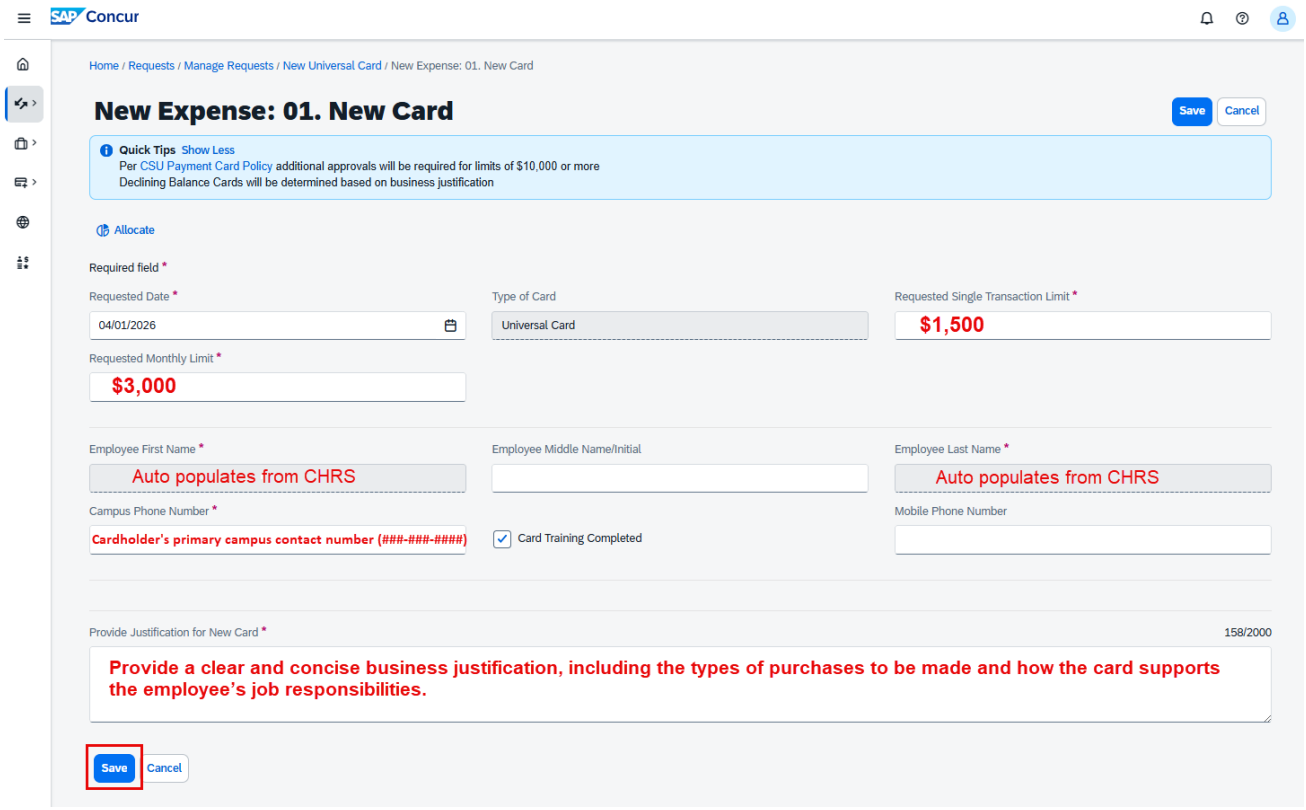


   b. Review and complete all required fields (*) and any optional fields, as desired.

Field Name	Description
Requested Date*	Enter the date the request is being submitted.
Requested Single Transaction Limit*	By default, all cardholders will begin at **tier one** ($1,500 single transaction limit).
Requested Monthly Limit*	By default, all cardholders will begin at **tier one** ($3,000 monthly limit).
Employee First Name*	Automatically populated from CHRS system records. Verify accuracy; if incorrect, the employee must contact Human Resources (HR) to update their official employee record.
Employee Middle Name/Initial	Enter if applicable, and if you would like the information to be reflected on your physical card.
Employee Last Name*	Automatically populated from CHRS system records. Verify accuracy; if incorrect, the employee must contact Human Resources (HR) to update their official employee record.
Campus Phone Number*	Provide the employees' primary campus contact number. Enter dash character format ###-###-####.
Card Training Completed	Confirm completion of all required Universal Card training prior to submission.
Provide Justification for New Card*	Provide a clear and concise business justification, including the types of purchases to be made and how the card supports the employee's job responsibilities.

4. Click **Save** and then the **Expected Expenses** screen displays.

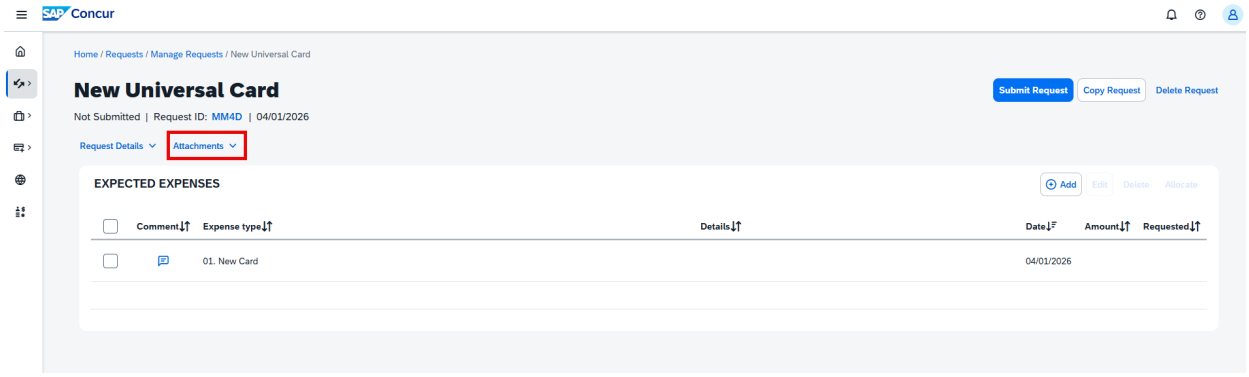
   Note: Once saved, alerts may display if information is missing for the expense.



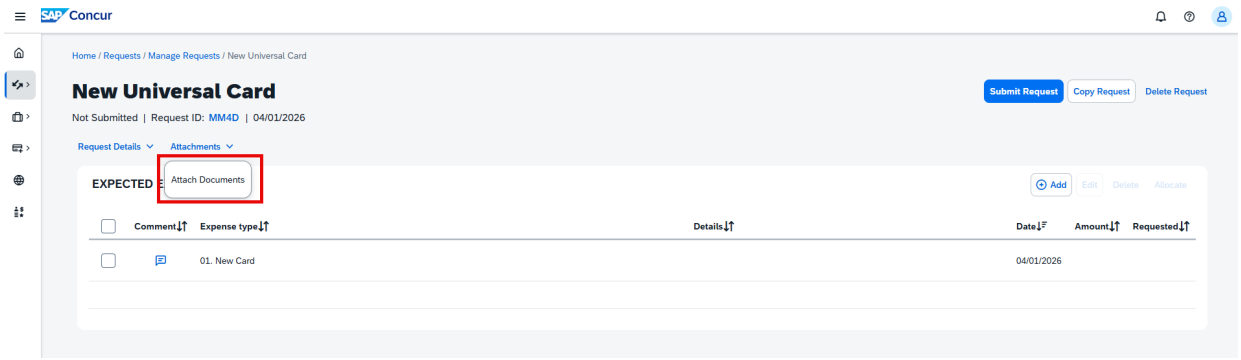
5. The **Expected Expenses** screen displays, allowing users to add the required Attachments for the new card request.

   Note: All new card requests require the applicant to complete the Chancellor's Office CSU Payment Card Program Training and the CSUSB Universal Card Program Training before the card is issued. Applicants must upload the **Certificate of Completion for the required trainings** in the **Expected Expenses** screen as supporting documentation.

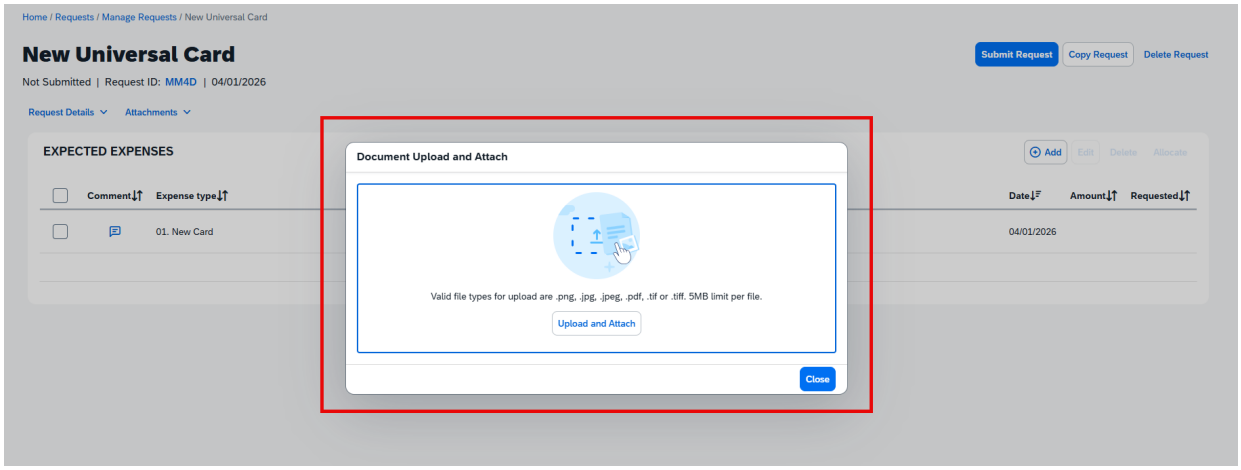
   a. Select **Attachments** from the **Expected Expenses** screen, to display the menu options.



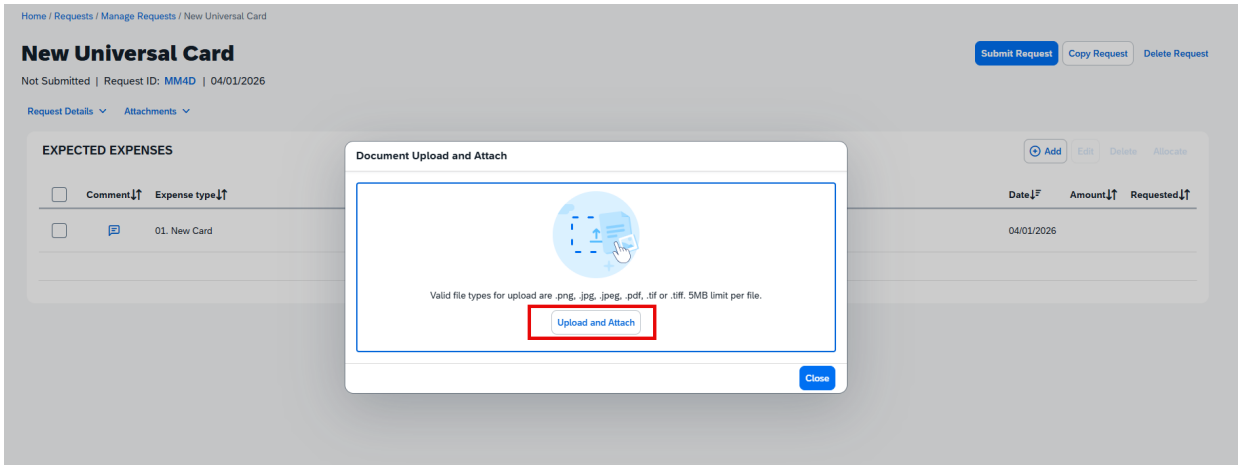
b. Select **Attach Documents** from the menu options.



c. The **Document Upload and Attach** window launches.

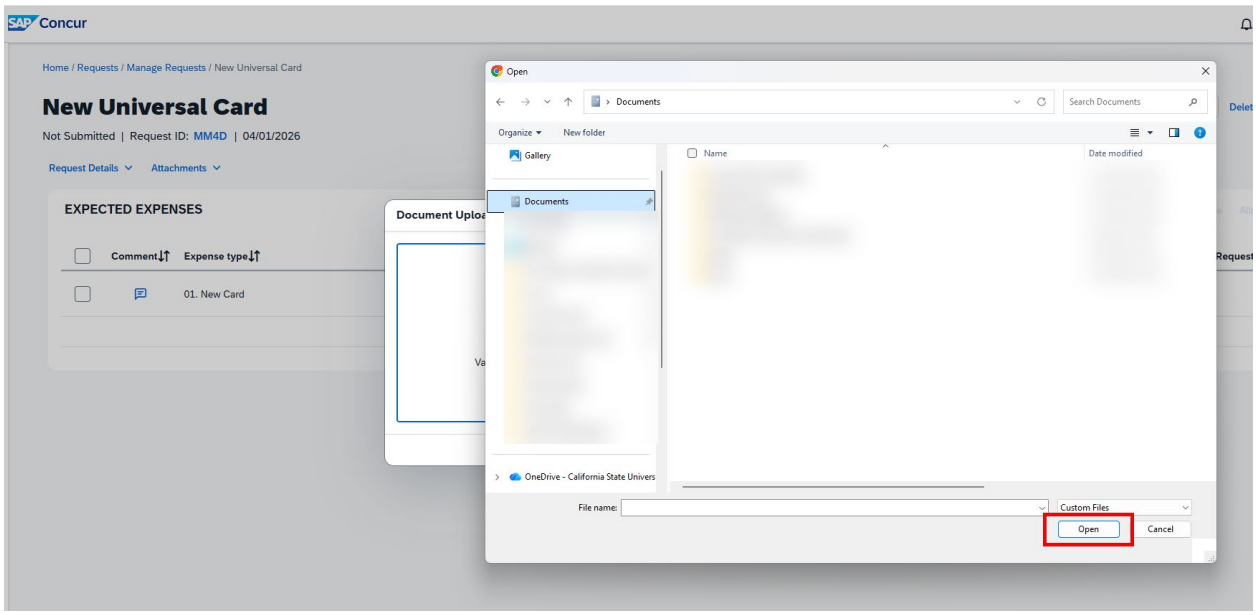


d. Select **Upload and Attach**.

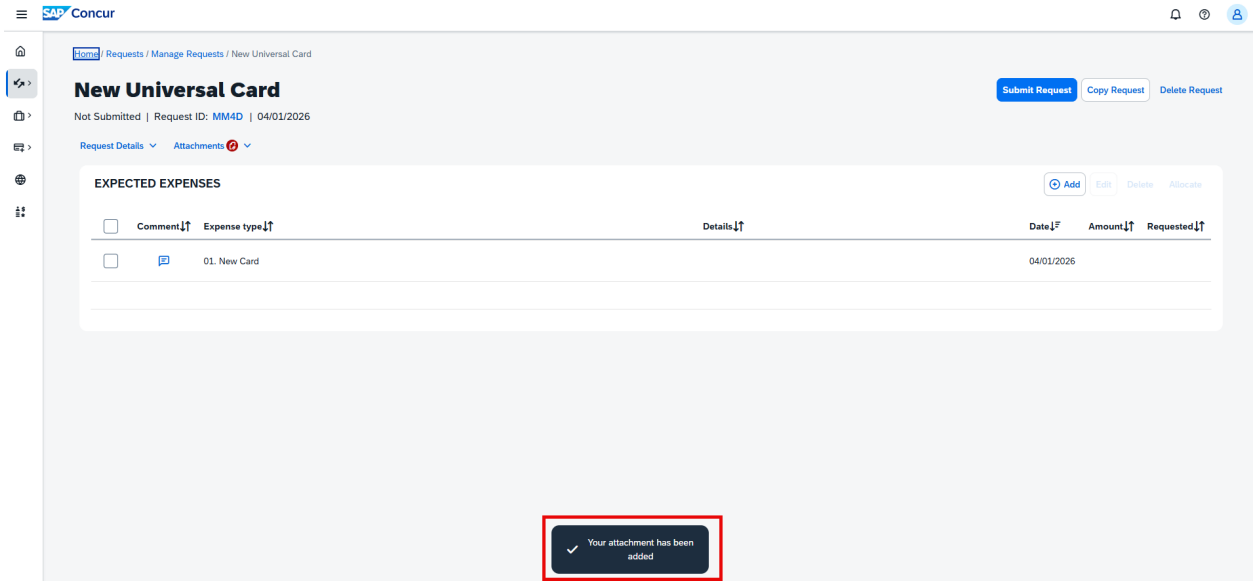


e. Once you select **Upload and Attach** it will open your desktop file browser. Navigate to the location of your supporting documents, select the required file(s), and then click **Open** to attach them to your request.

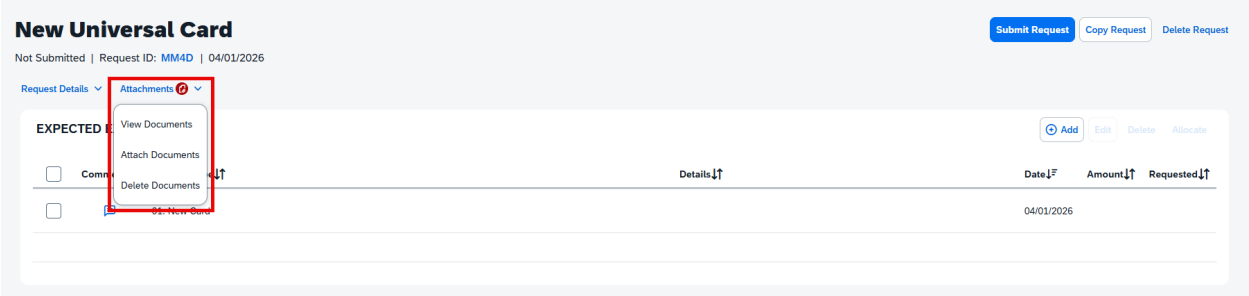
Note: Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.



f. A message displays at the bottom of the page: **Your attachment has been added**.



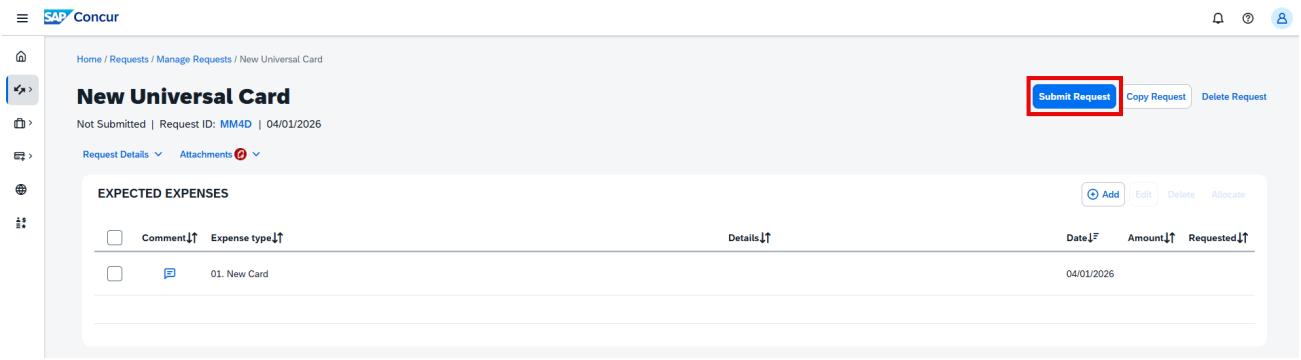
g. Once documents are uploaded, a small red icon appears in the **Attachments** menu to indicate that the request contains attachments.



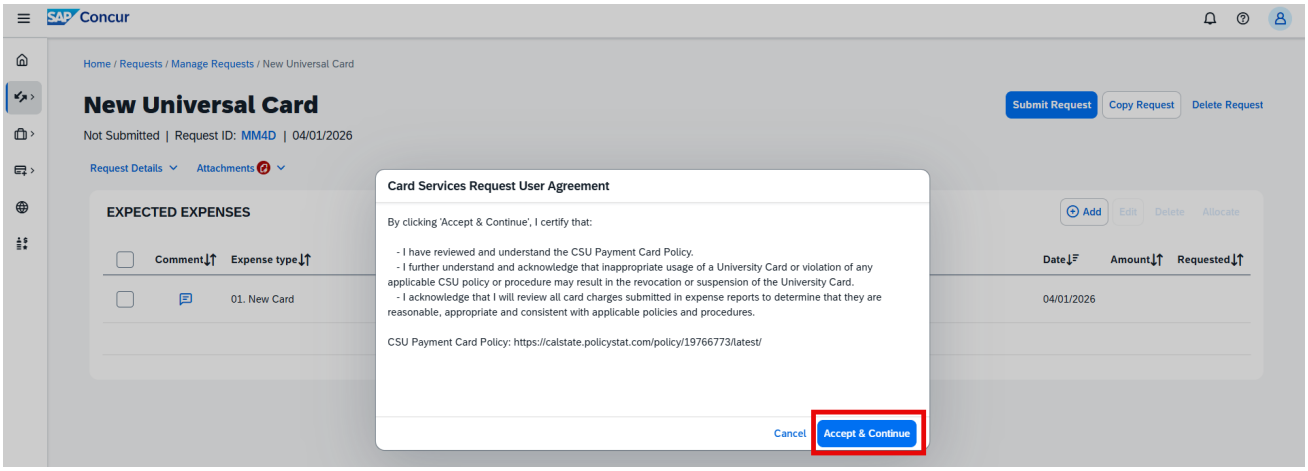
The menu then displays three options (View Documents, Attach Documents, and Delete Documents) allowing users to review, update, or remove previously uploaded files.

Note: The documents cannot be removed once the request has been submitted or approved; however, additional documents may be uploaded at any time.

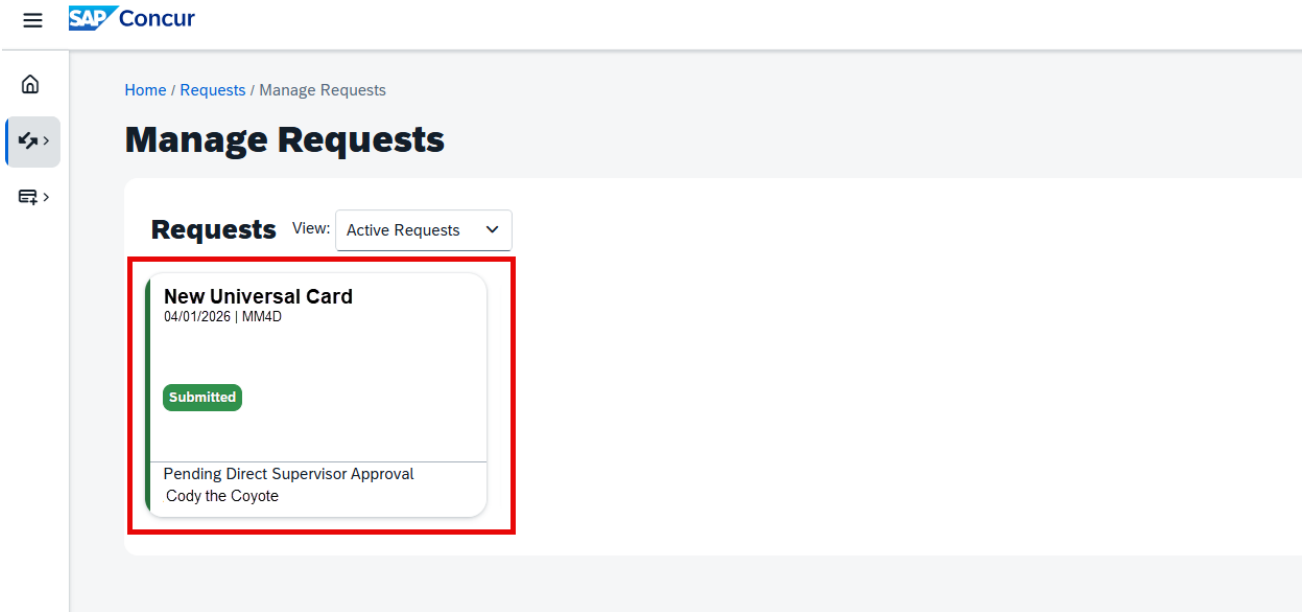
6. After completing the fields and attachments, click **Submit Request**.



7. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



8. The new **Request** is displayed under **Manage Requests**.

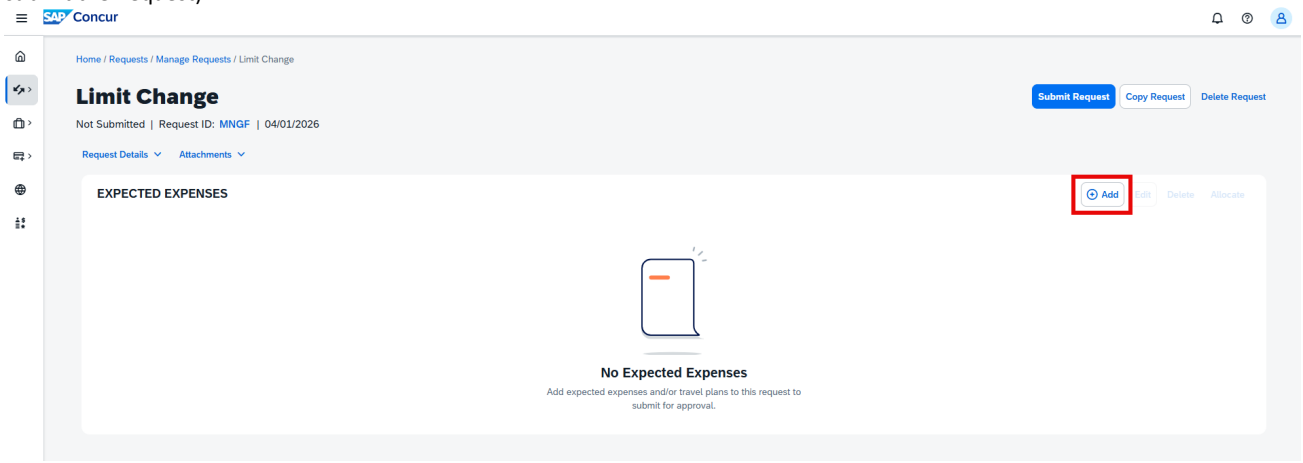


9. The approval workflow for a credit card service request depends on the type of service requested; for **New Card Requests**, the direct supervisor approval is required.

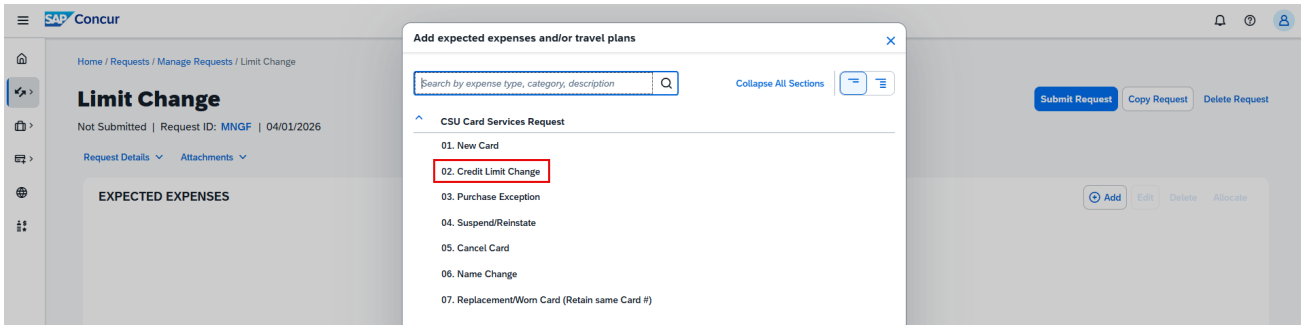
Adding Card Service to Request – 02. Credit Limit Change

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



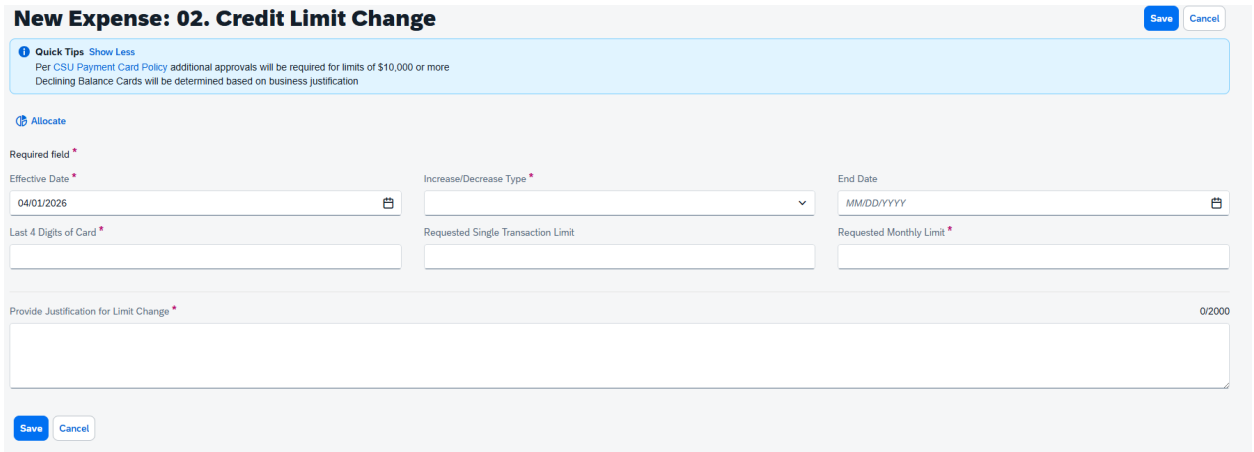
2. Select **02. Credit Limit Change** for your request.



3. The **New Expense** form for the selected service displays (e.g., Credit Limit Change).

   Note: The form fields will differ based on the card service selected.
   Quick Tips **(provided in blue)** display important information related to the details being requested.

   a. Request Layout



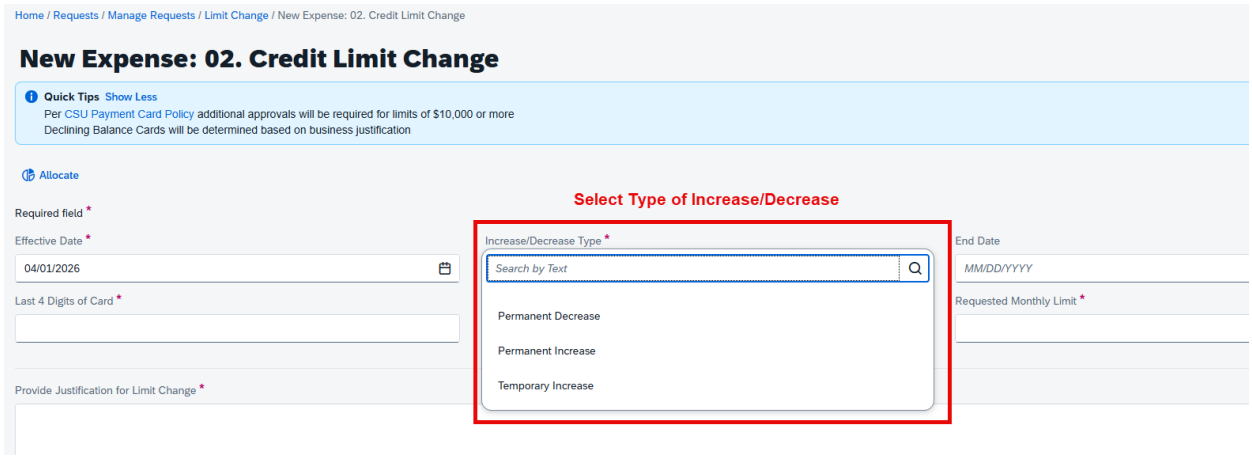
b. Review and complete all required fields (*) and any optional fields, as desired.

Field Name	Description
Effective Date*	Enter the start date of the requested increase or decrease.
Increase/Decrease Type*	Select whether the request is temporary or permanent, and an increase or decrease.
End Date (if applicable)	For temporary changes, provide the end date of the request.
Last 4 Digits of Card*	Enter the last four digits of the Universal Card account number.
Requested Single Transaction Limit	Indicate the single transaction limit requested.
Requested Monthly Limit*	Indicate the monthly limit requested.
Provide Justification for Limit Change*	Provide a clear and detailed business reason supporting the request.

Note: Permanent limit increases must align with the Tiers outlined in the Universal Card Handbook:

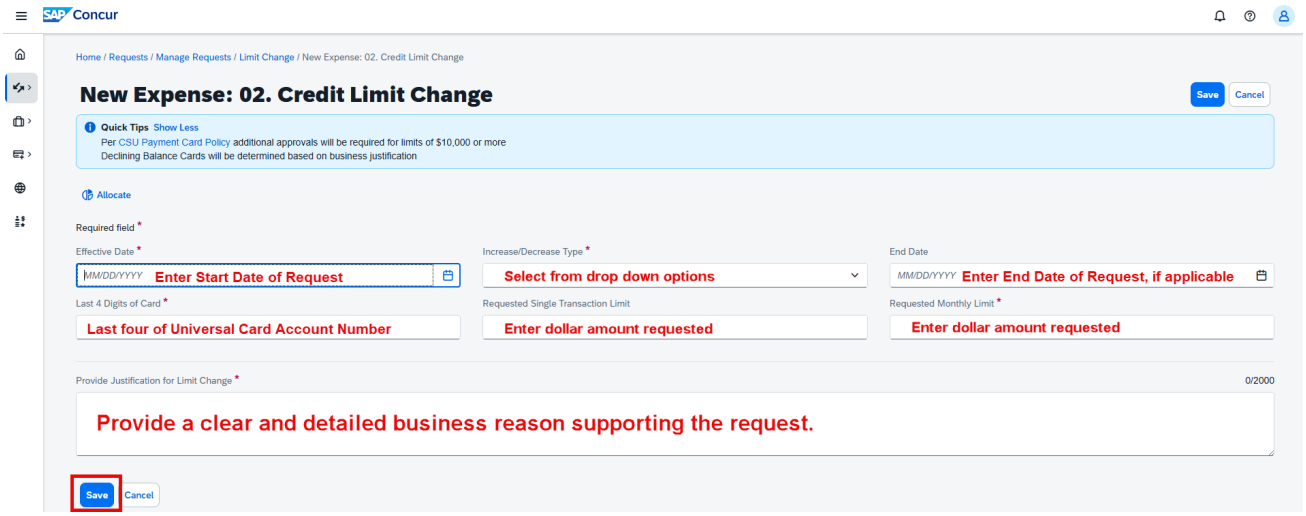
- Tier 2: $5,000 credit limit and $2,500 single transaction limit
- Tier 3: $10,000 credit limit and $3,500 single transaction limit.

If only a single transaction limit increase is being requested, enter “current monthly limit” in the Monthly Limit field to indicate that no additional monthly credit is required.

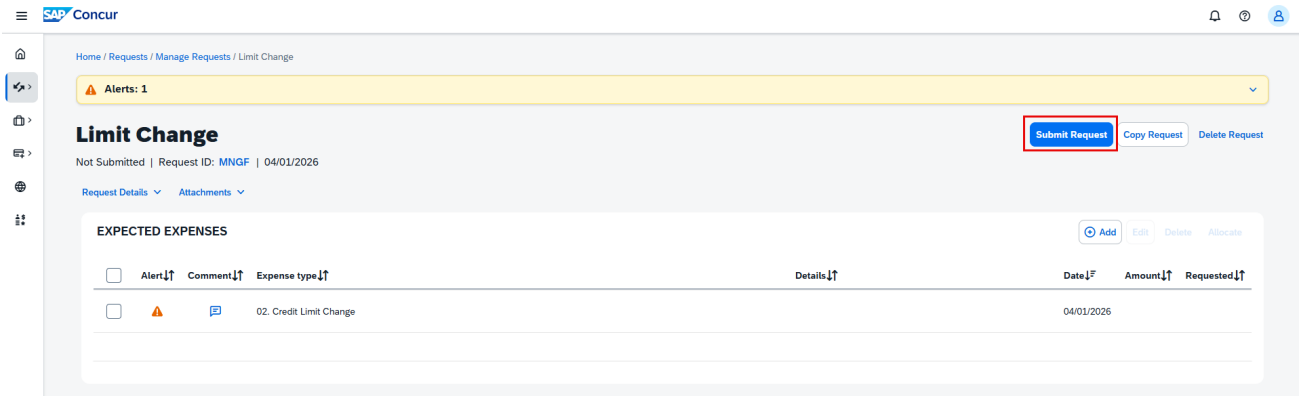


4. Click **Save**. The **Expected Expenses** screen displays.

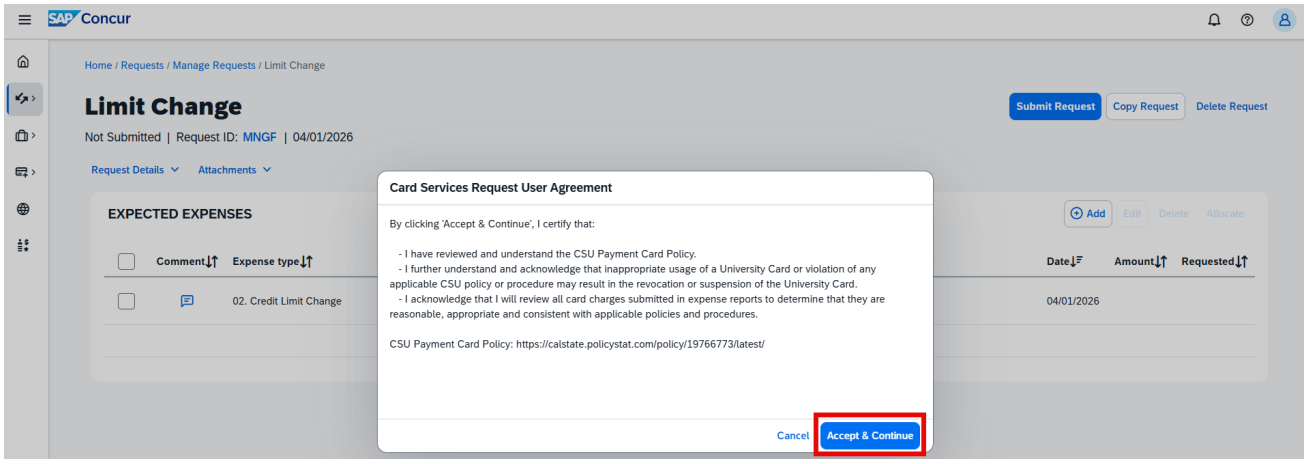
   Note: Alerts may display if information is missing for the expense. See the **Alert Types** section below for details.



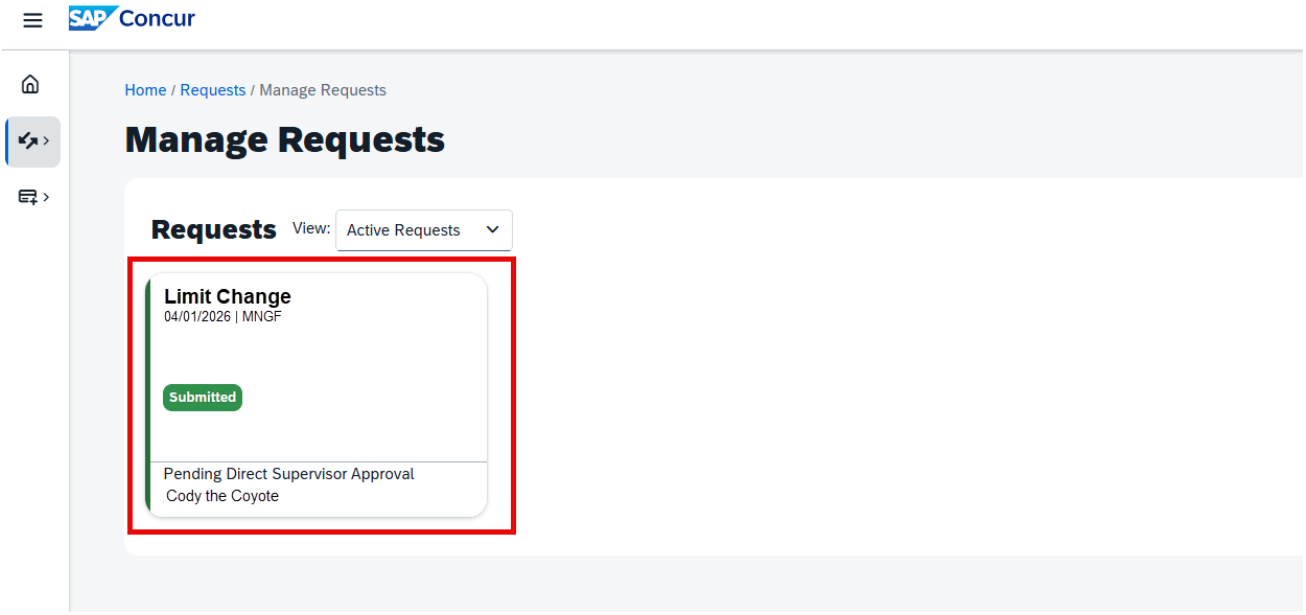
5. After completing the fields, click **Submit Request**.



6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



7. The new **Request** is displayed under **Manage Requests**.



8. The approval workflow for a credit card service request depends on the type of service requested; requests for monthly limits above the CSU Payment Card Policy threshold require DOA or budget owner approval.
9. To review the approval flow, see the **Request Timeline** section below for instructions.

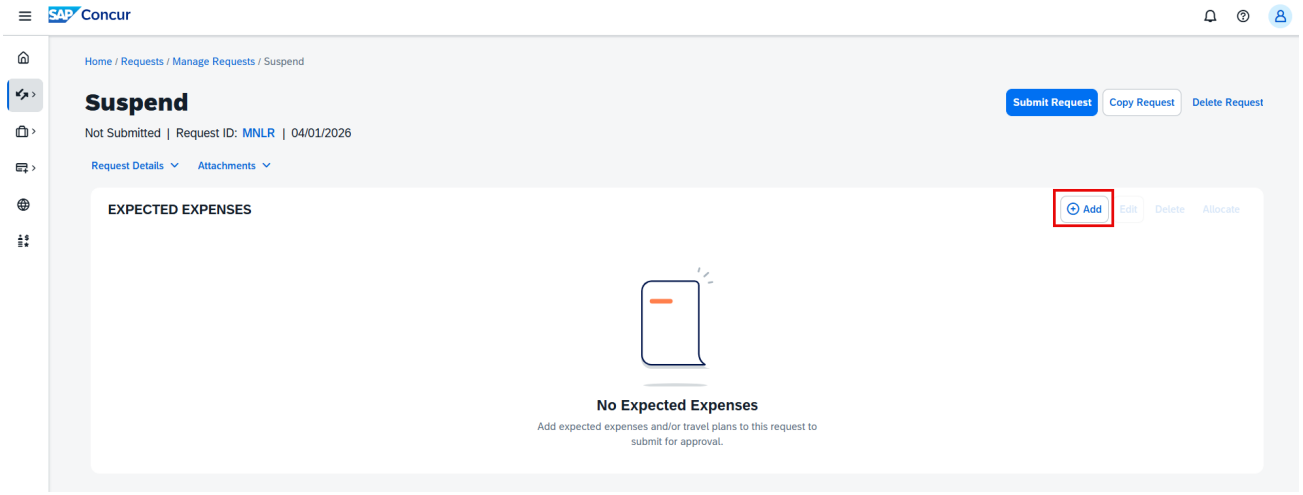
Adding Card Service to Request – 03. Purchase Exception (DO NOT USE)

The **Purchase Exception** option (Option 03) is not used for Universal Card requests. **DO NOT SELECT THIS OPTION.** Please choose the appropriate request type from the available options to ensure proper processing.

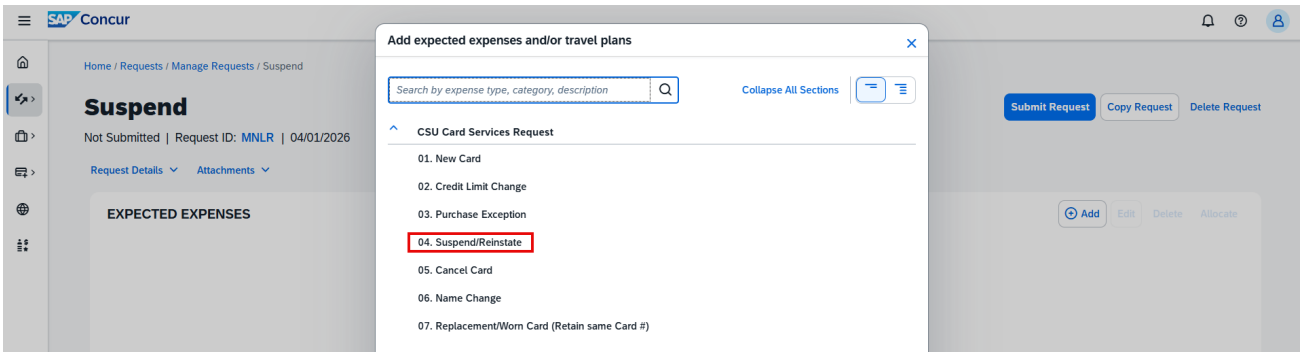
Adding Card Service to Request – 04. Suspend/Reinstate

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



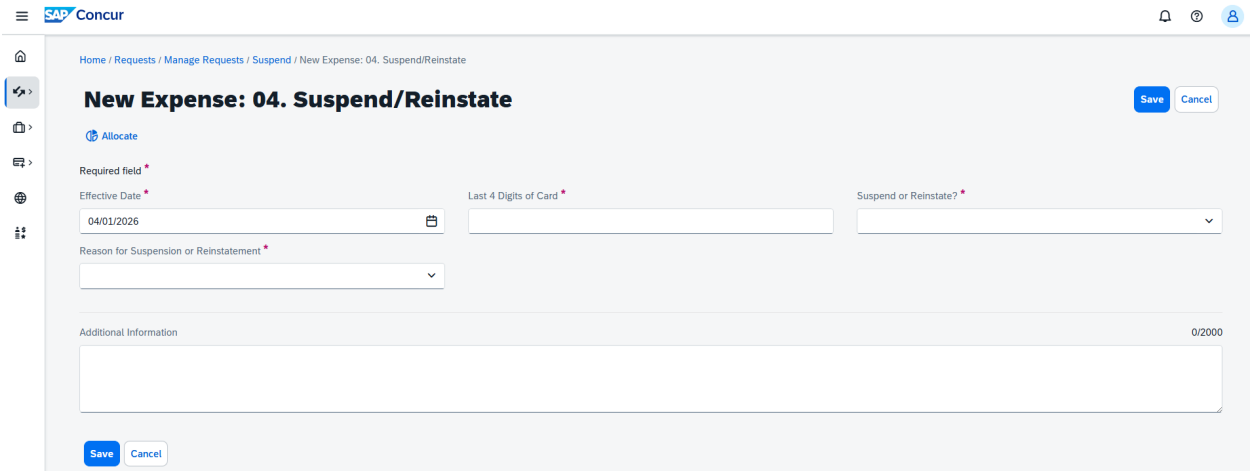
2. Select **04. Suspend/Reinstate** for your request.



3. The **New Expense** form for the selected service displays (e.g., Suspend/Reinstate).

   Note: The form fields will differ based on the card service selected.

   a. Request Layout



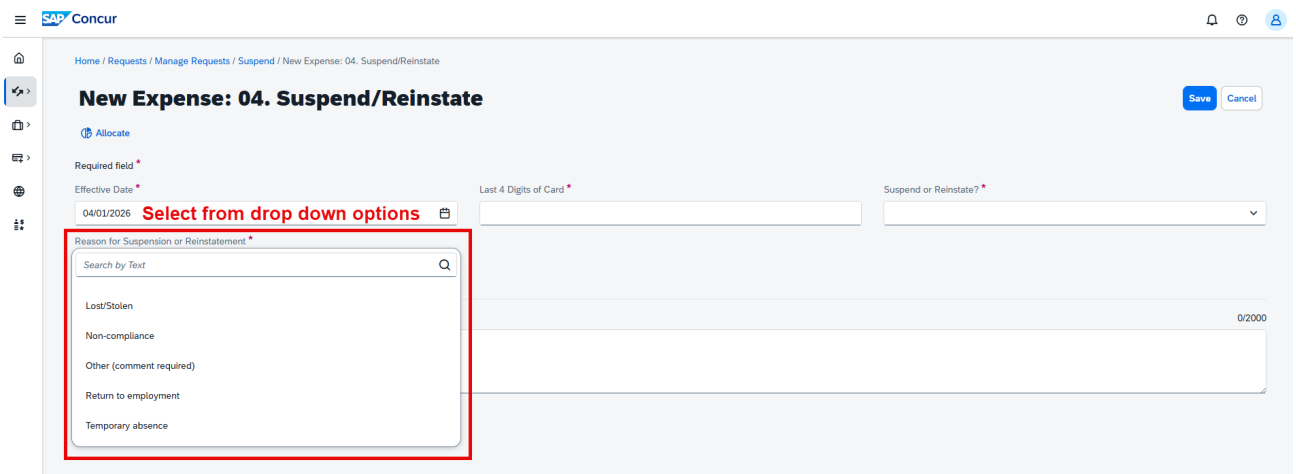
b. Review and complete all required fields (*) and any optional fields, as desired.

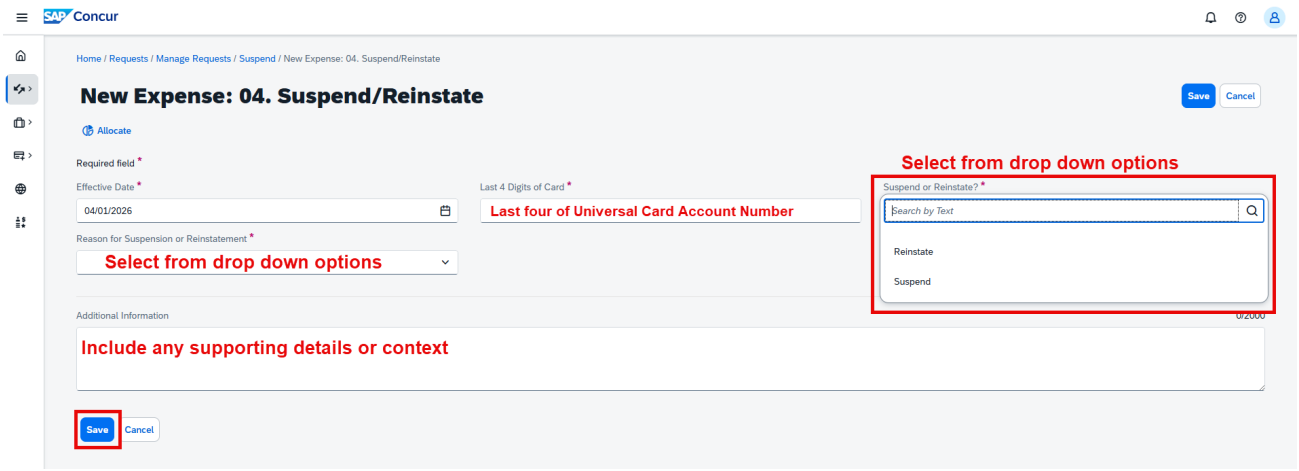
Field Name	Description
Effective Date*	Enter the start date of the request.
Last 4 Digits of Card*	Enter the last four digits of the Universal Card account number.
Suspend or Reinstate?*	Specify whether the request is suspend or reinstate.
Reason for Suspension or Reinstatement*	Select the appropriate reason from the list below: • Lost/Stolen: Use this option to report your lost or stolen Universal Card to the Universal Card Team. **IMPORTANT: Please call US Bank immediately to report your lost or stolen credit card at 1-800-344-5696.** • Non-Compliance: **DO NOT SELECT THIS OPTION.** • Other (comment required): Please complete the comment section to explain in detail. • Return to employment: Use this option to return a card to active use. • Temporary absence: Use this option to temporarily suspend an active card while the cardholder is on extended leave or vacation.
Additional Information	Include any supporting details or context.

Note: Reinstate allows a card to be reactivated following a temporary suspension, while Suspend allows a card to be temporarily deactivated and should be used when the cardholder will be on an extended leave or vacation.

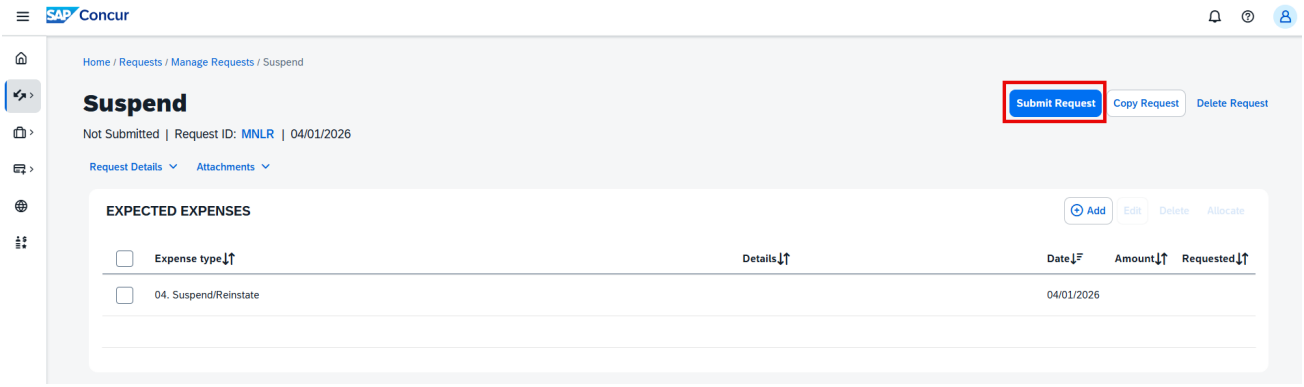
4. Click **Save**. The **Expected Expenses** screen displays.

Note: Alerts may display if information is missing for the expense. See the **Alert Types** section below for details.

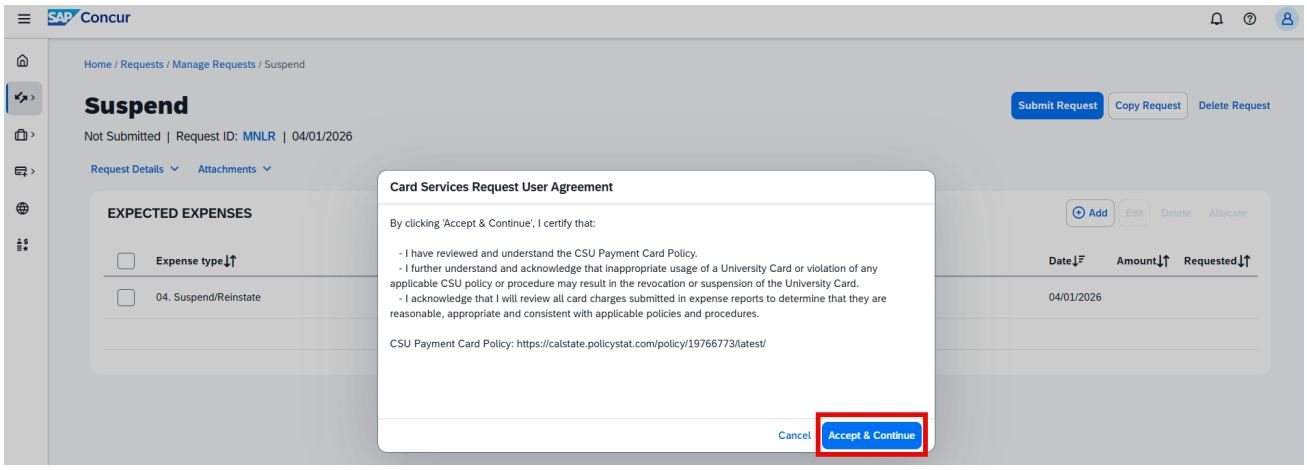




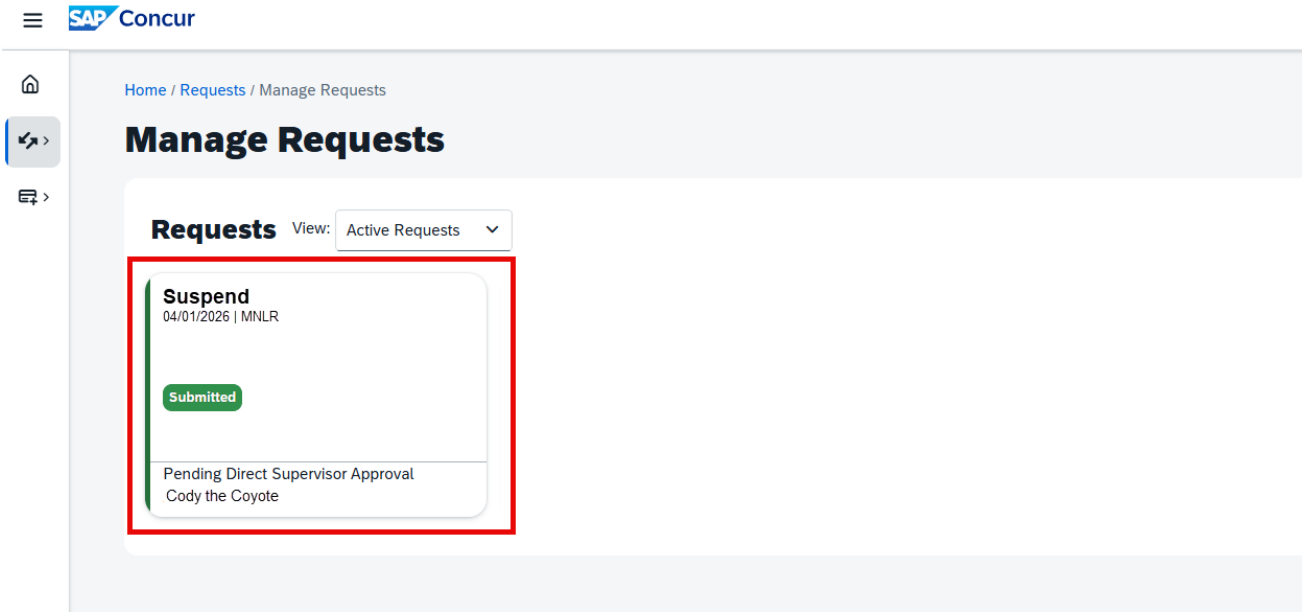
5. After completing the fields, click **Submit Request**.



6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



7. The new **Request** is displayed under **Manage Requests**.



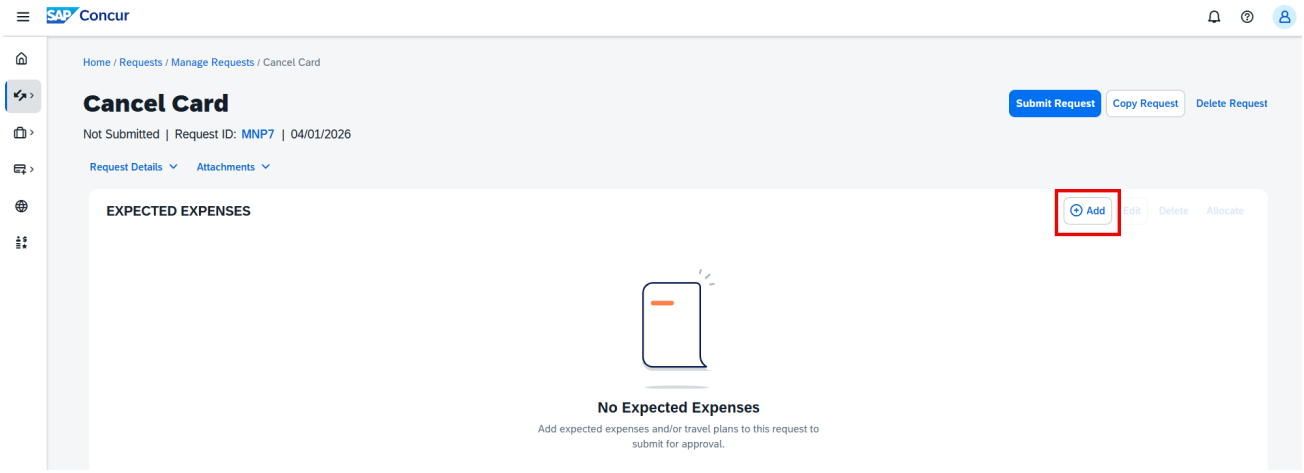
8. The approval workflow for a credit card service request depends on the type of service requested; this request is routed directly to the Card Administrator.

9. To review the approval flow, see the **Request Timeline** section below for instructions.

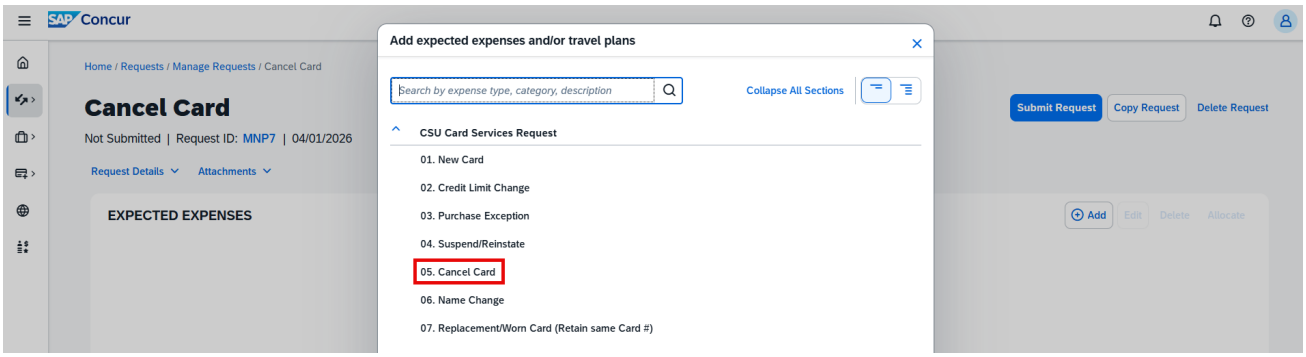
Adding Card Service to Request – 05. Cancel Card

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



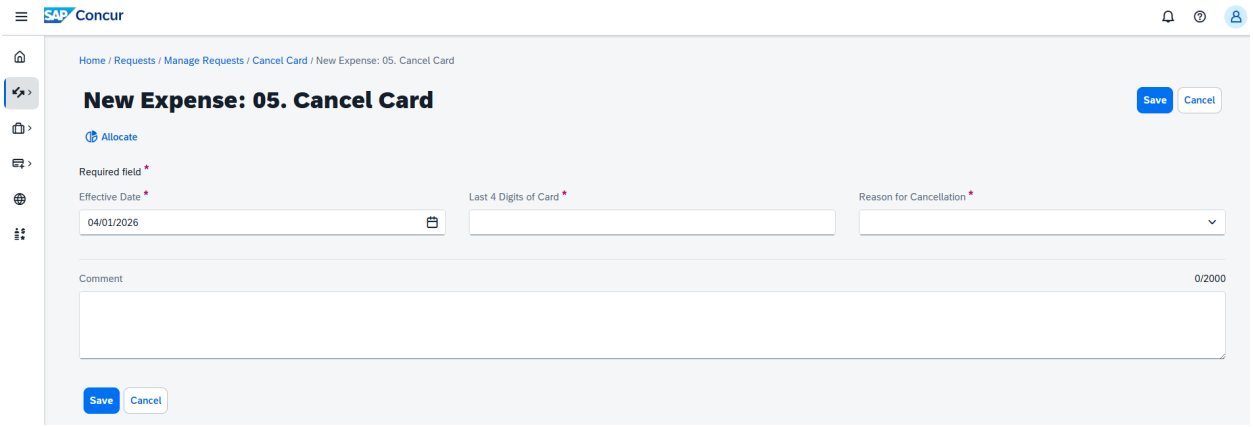
2. Select **05. Cancel Card** for your request.



3. The **New Expense** form for the selected service displays (e.g., Cancel Card).

   Note: The form fields will differ based on the card service selected. This request cancels your card account permanently. Please return your card to the Procurement Office (SH-125).

   a. Request Layout

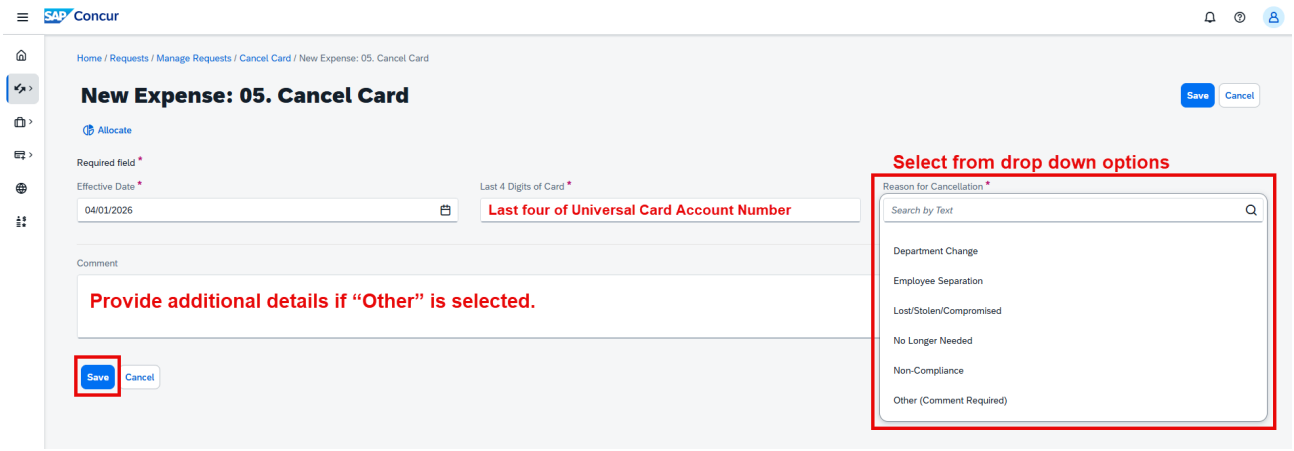


b. Review and complete all required fields (*) and any optional fields, as desired.

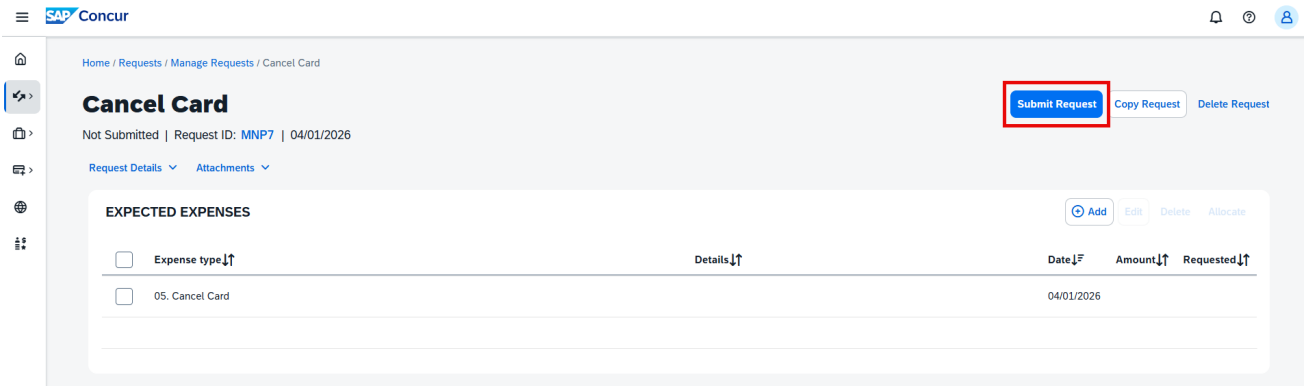
Field Name	Description
Effective Date*	Enter the start date of the request.
Last 4 Digits of Card*	Enter the last four digits of the Universal Card account number.
Reason for Cancellation*	Select the appropriate reason from the list below: • Department Change • Employee Separation • Lost/Stolen/Compromised – **DO NOT SELECT THIS OPTION** • No Longer Needed • Non-Compliance – **DO NOT SELECT THIS OPTION** • Other (Comment Required)
Comment	Provide additional details if "Other" is selected.

4. Click **Save**. The **Expected Expenses** screen displays.

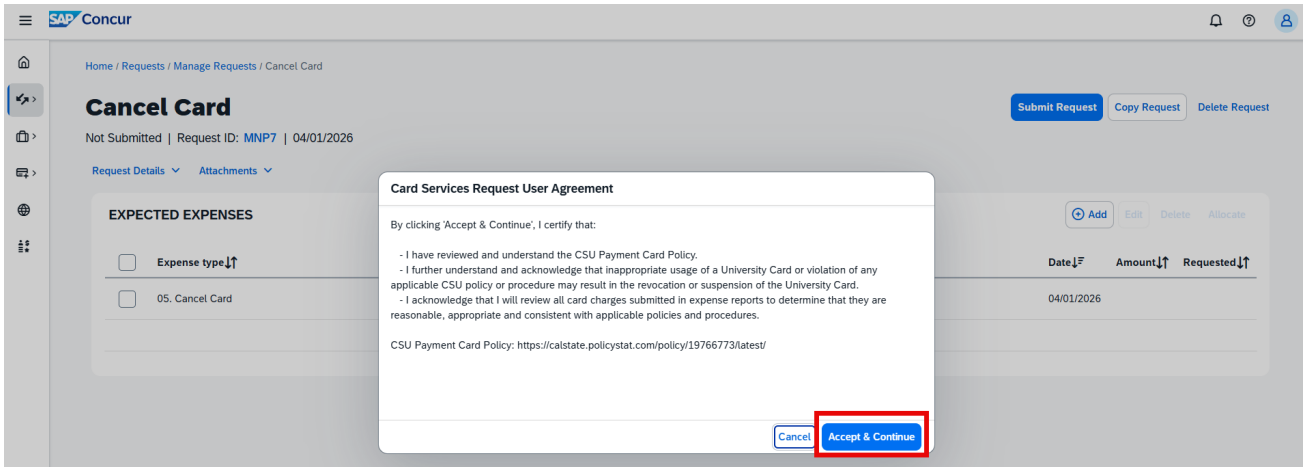
Note: Alerts may display if information is missing for the expense. See the **Alert Types** section below for details.



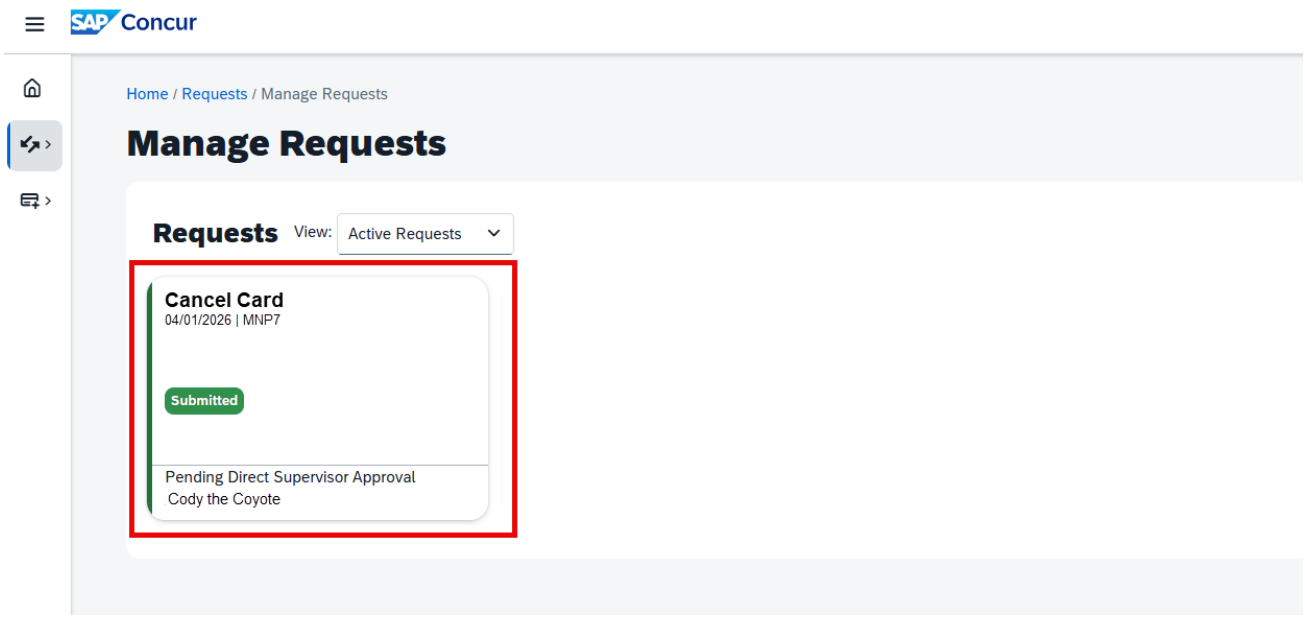
5. After completing the fields, click **Submit Request**.



6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



7. The new **Request** is displayed under **Manage Requests**.



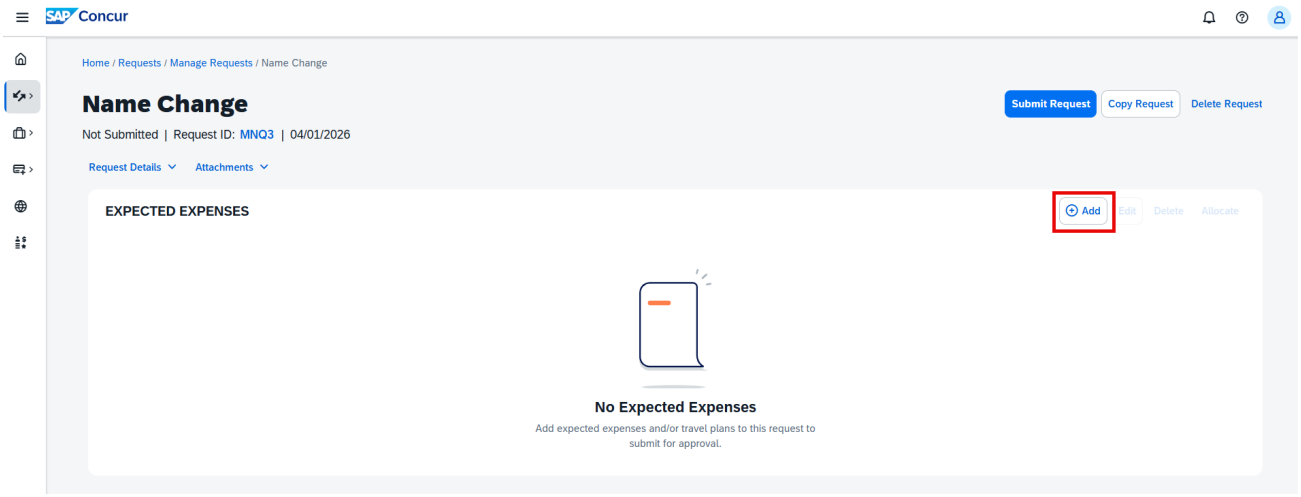
8. The approval workflow for a credit card service request depends on the type of service requested; this request is routed directly to the Card Administrator.

9. To review the approval flow, see the **Request Timeline** section below for instructions.

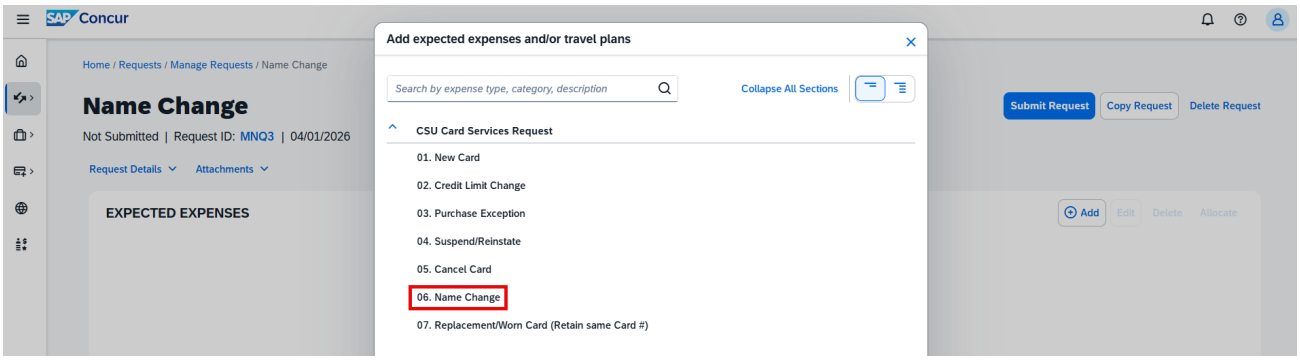
Adding Card Service to Request – 06. Name Change

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



2. Select **06. Name Change** for your request.

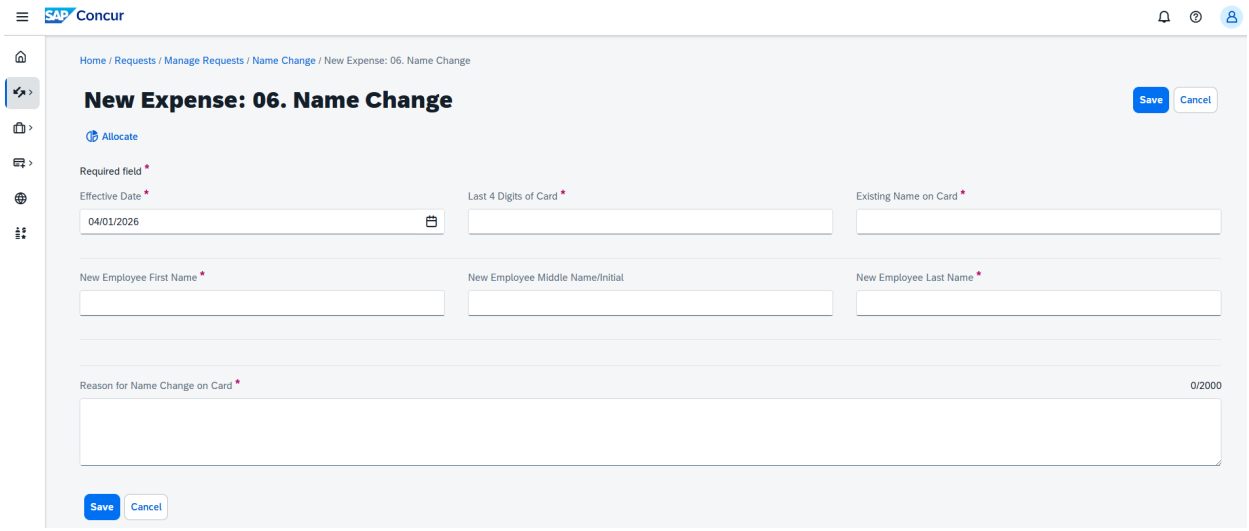


3. The **New Expense** form for the selected service displays (e.g., Name Change).

   Note: The form fields will differ based on the card service selected.

   The employee's name displayed in Concur is automatically populated from the CHRS database and should not be modified within this request form. If the name shown is incorrect, the employee must contact Human Resources (HR) to update their official record. Once the name has been updated in CHRS, a Name Change Request may be submitted to ensure the updated name is reflected on the physical Universal Card.

a. Request Layout

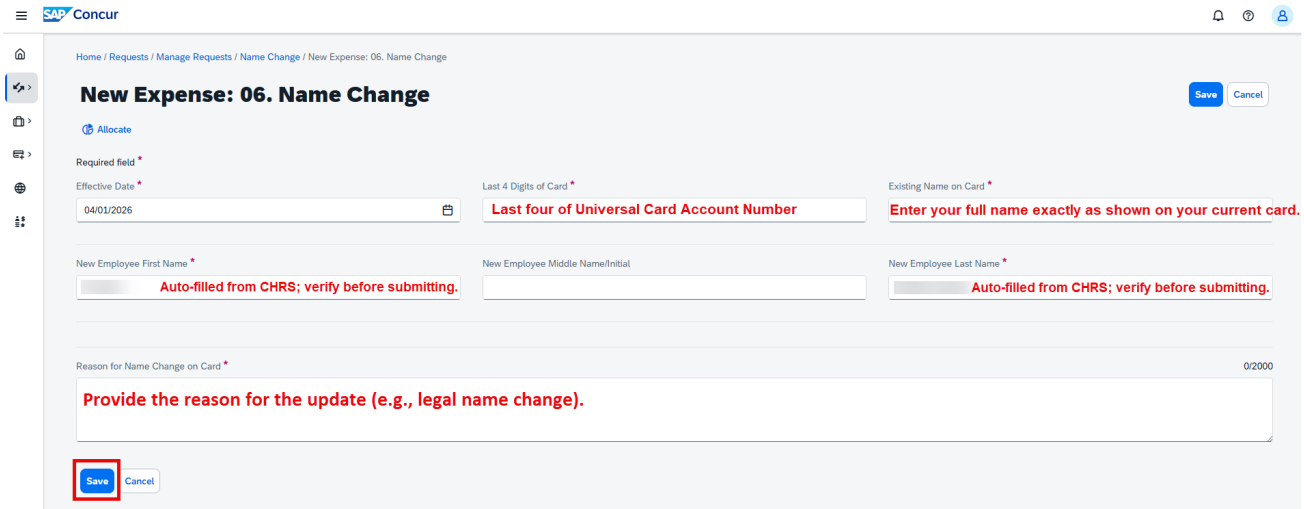


b. Review and complete all required fields and any optional fields, as desired.

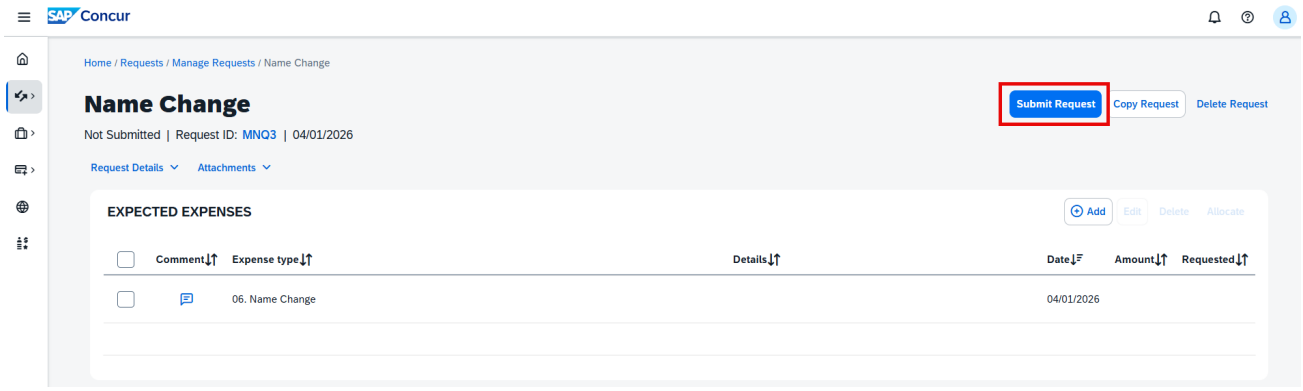
Field Name	Description
Effective Date*	Automatically populated from the Request Header.
Last 4 Digits of Card*	Enter the last four digits of the Universal Card account number.
Existing Name on Card*	Provide full name as it appears on your current physical card.
New Employee First Name*	This data is automatically populated from CHRS; verify accuracy before submitting.
New Employee Middle Name/Initial	Enter if applicable, and if you would like the information to be reflected on your physical card.
New Employee Last Name*	This data is automatically populated from CHRS; verify accuracy before submitting.
Reason for Name Change on Card*	Provide the reason for the update (e.g., legal name change).

4. Click **Save**. The **Expected Expenses** screen displays.

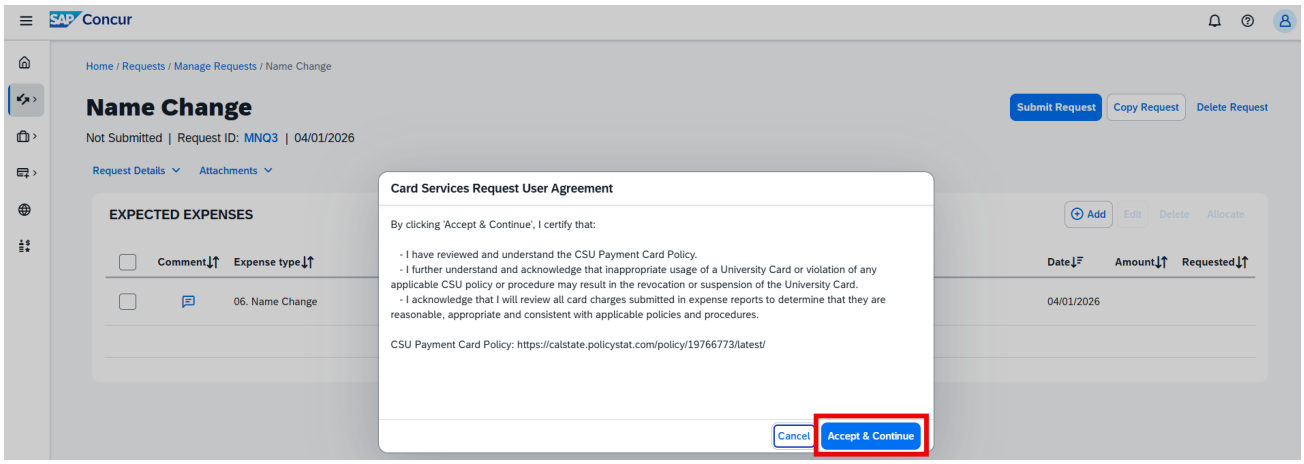
Note: Alerts may display if information is missing for the expense. See the **Alert Types** section below for details.



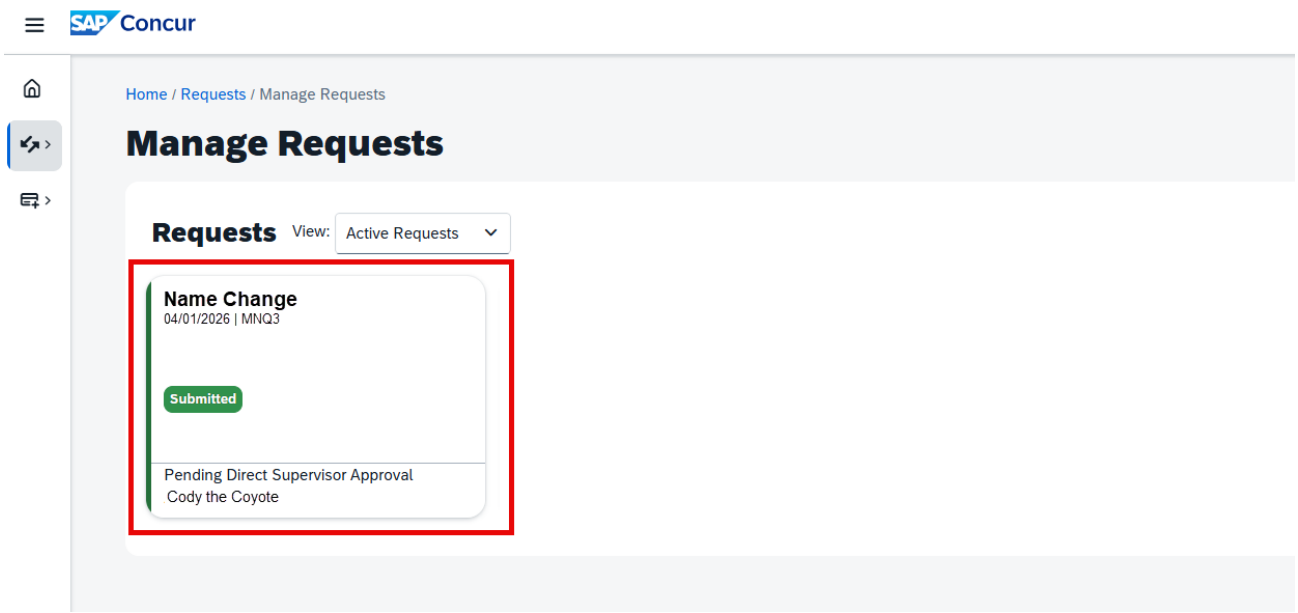
5. After completing the fields, click **Submit Request**.



6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



7. The new **Request** is displayed under **Manage Requests**.

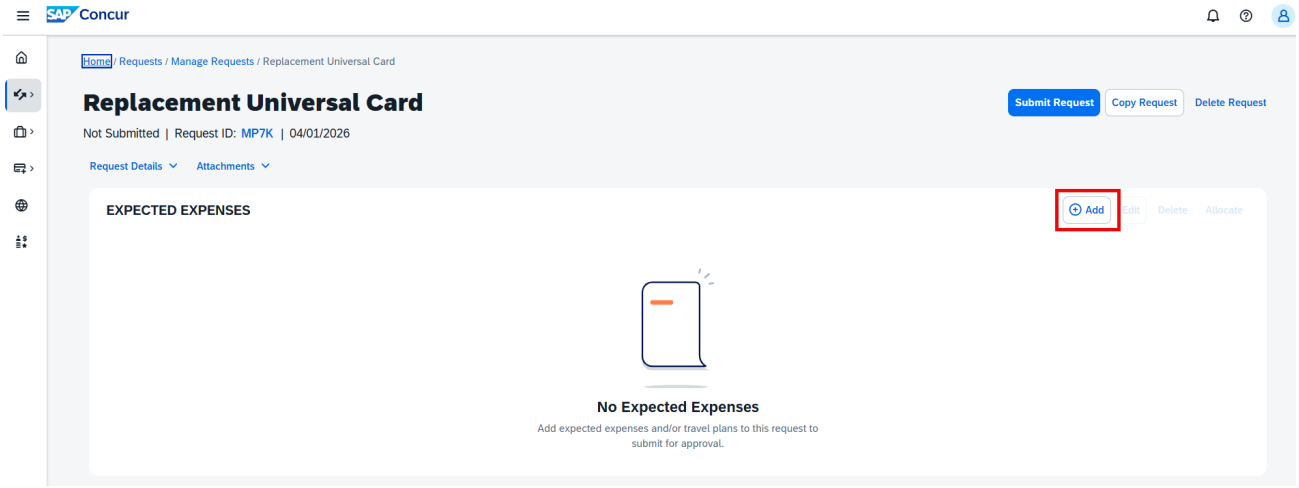


8. The approval workflow for a credit card service request depends on the type of service requested; this request is routed directly to the Card Administrator.
9. To review the approval flow, see the **Request Timeline** section below for instructions.

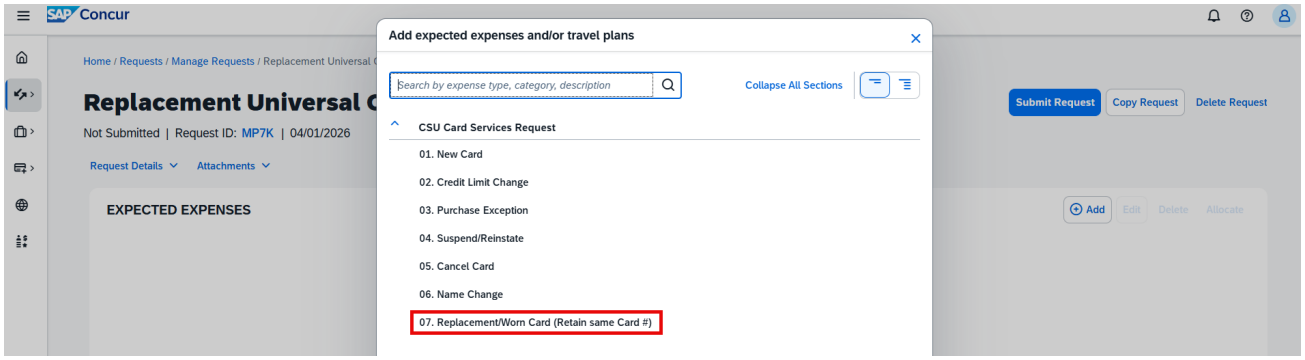
Adding Card Service to Request – 07. Replacement/Worn Card (Retain same Card #)

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



2. Select **07. Replacement/Worn Card (Retain same Card #)** for your request.

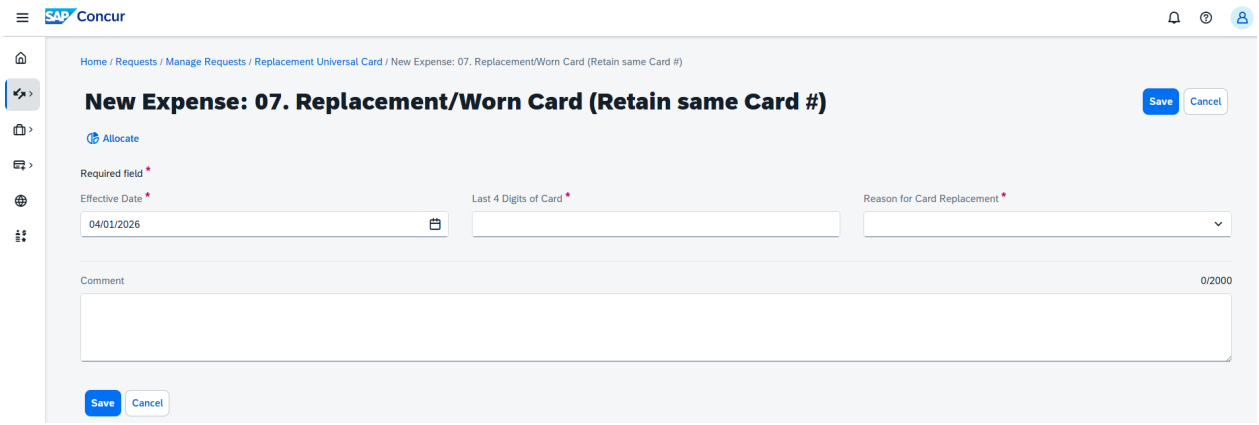


3. The **New Expense** form for the selected service displays (e.g., Replacement/Worn Card (Retain same Card #).

   Note: The form fields will differ based on the card service selected.

   Use this option to report your replacement Universal Card to the Universal Card Team. **IMPORTANT: Please call US Bank to request your replacement Universal Card at 1-800-344-5696. US Bank will order a replacement card that will be delivered to the Procurement Office (SH-125). The Cardholder must return the worn out/damaged card to the Universal Card Team to be destroyed. The Cardholder will be notified to pick up the replacement card from the Universal Card Team.**

a. Request Layout

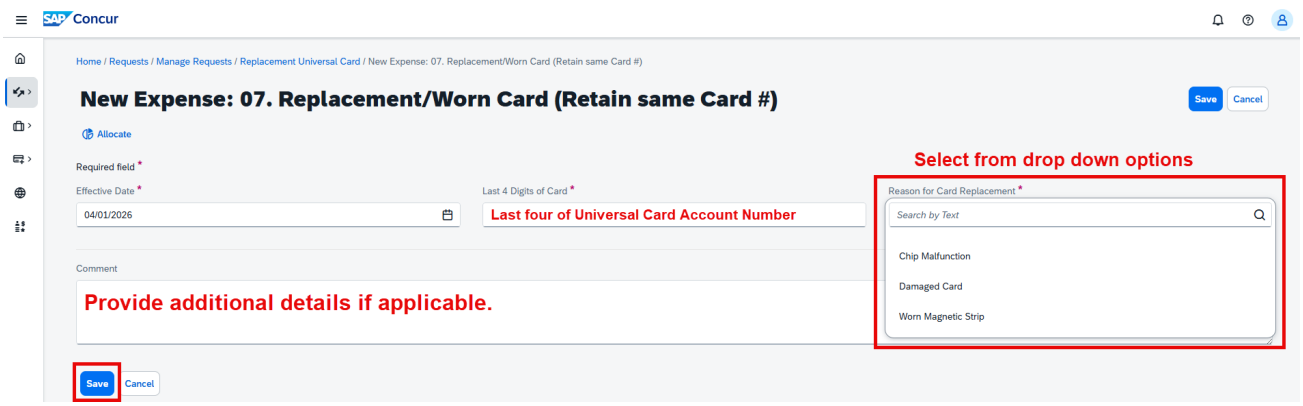


b. Review and complete all required fields (*) and any optional fields, as desired.

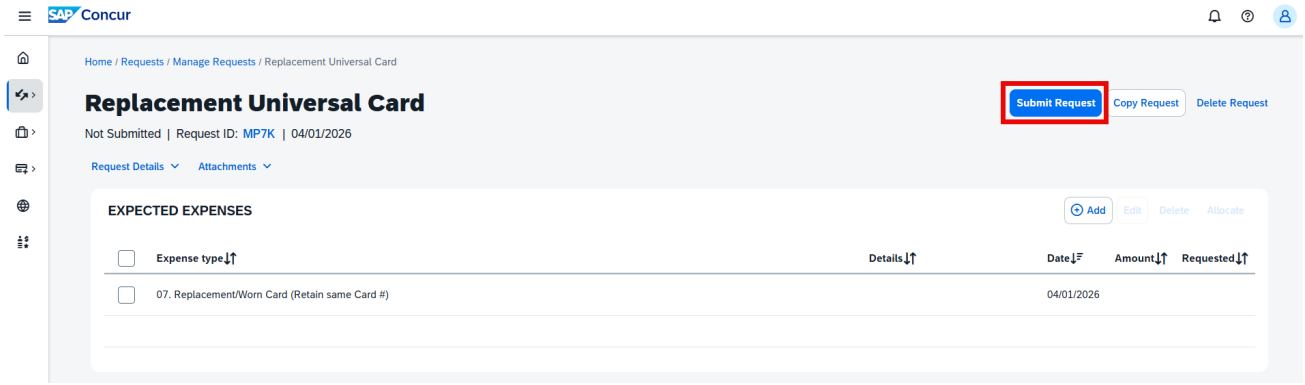
Field Name	Description
Effective Date*	Enter the start date of the request.
Last 4 Digits of Card*	Enter the last four digits of the Universal Card account number.
Reason for Card Replacement*	Select the appropriate reason from the list below: • Chip Malfunction • Damaged Card • Worn Magnetic Strip
Comment	Provide additional details if applicable.

4. Click **Save**. The **Expected Expenses** screen displays.

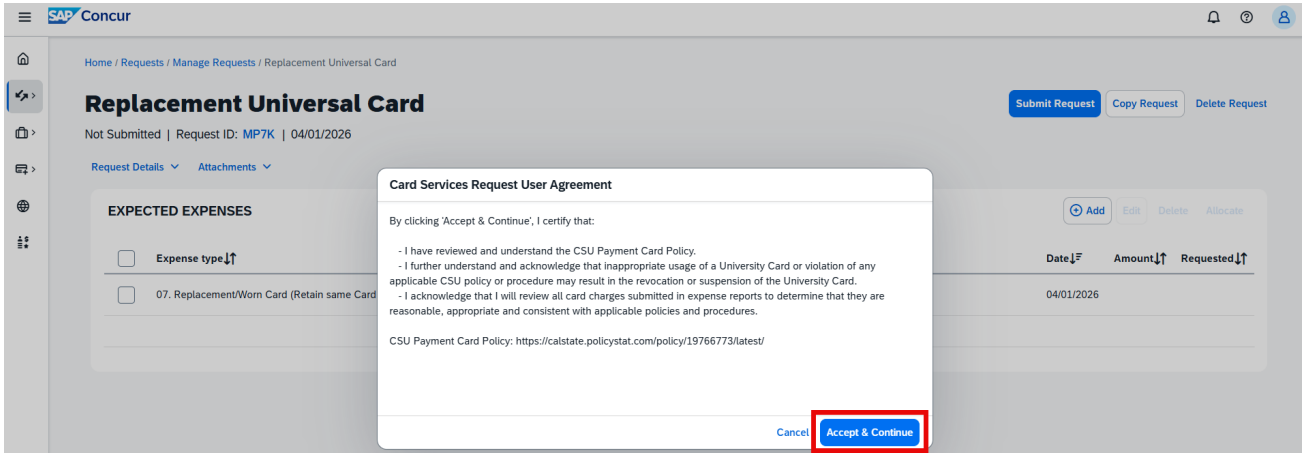
Note: Alerts may display if information is missing for the expense. See the **Alert Types** section below for details.



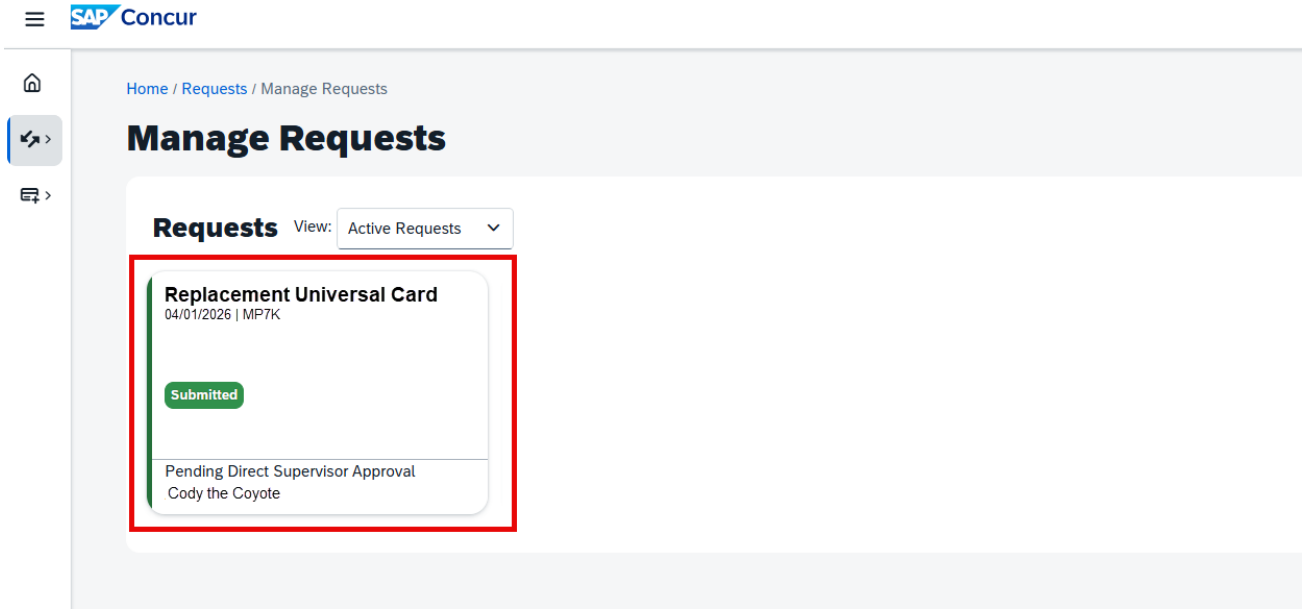
5. After completing the fields, click **Submit Request**.



6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue.**



7. The new **Request** is displayed under **Manage Requests**.

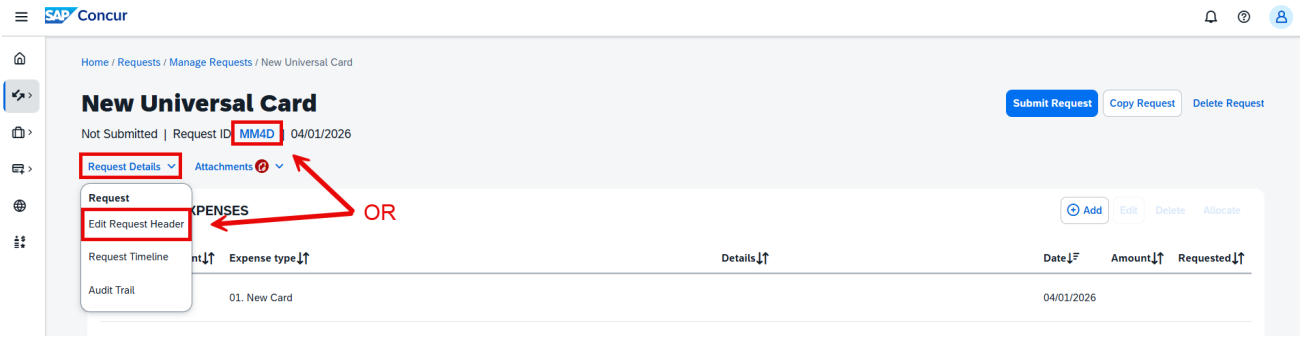


8. The approval workflow for a credit card service request depends on the type of service requested; this request is routed directly to the Card Administrator.
9. To review the approval flow, see the **Request Timeline** section below for instructions.

Request Details

Edit Request Header

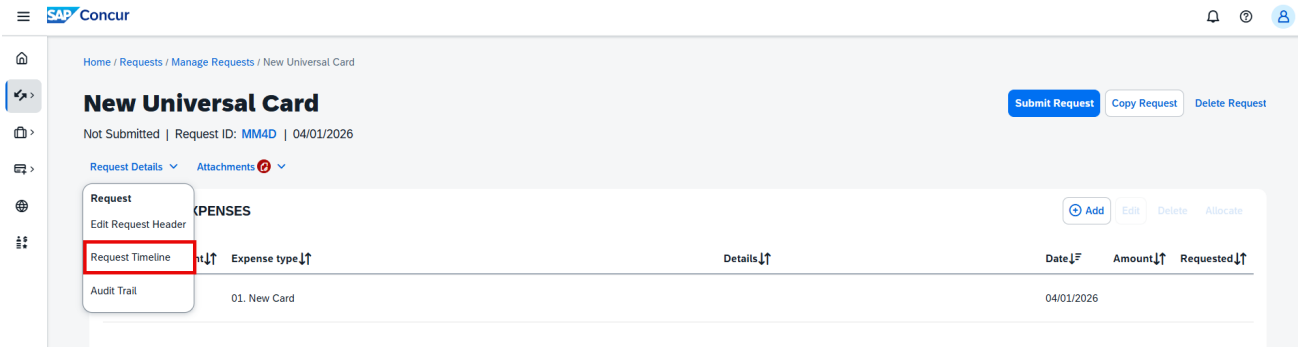
1. Select **Request Details**, then choose **Edit Request Header** or select the **Request ID** to open and update the request.



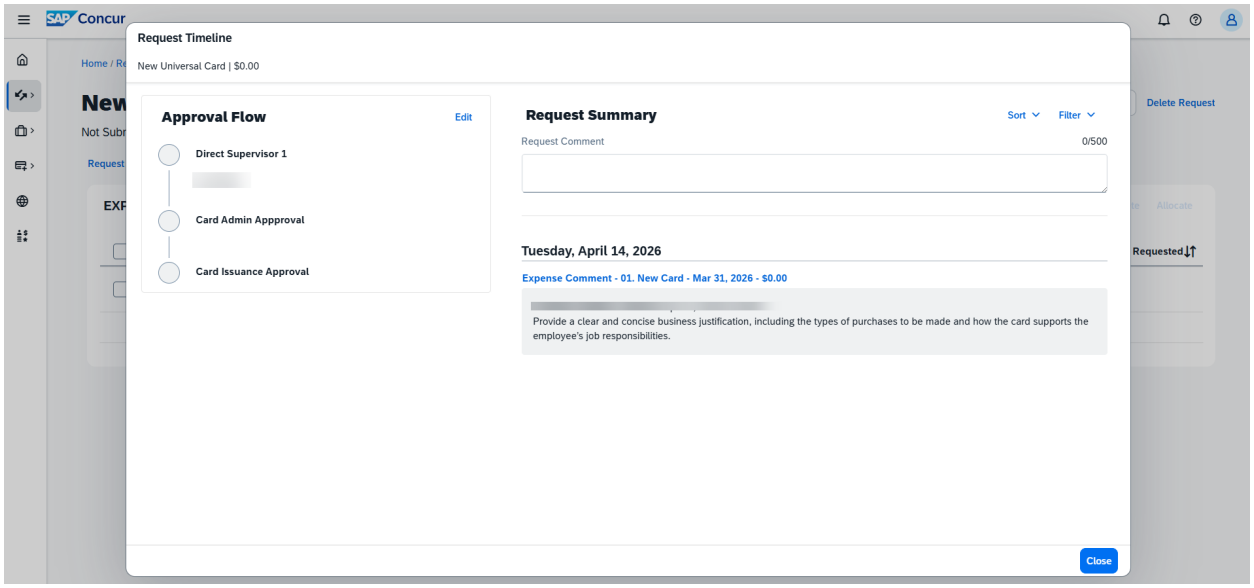
View Request Timeline

The timeline displays the approval workflow and identifies the steps which have been completed or are outstanding.

1. Select **Request Details**, then choose **Request Timeline** to view the status and history of the request.



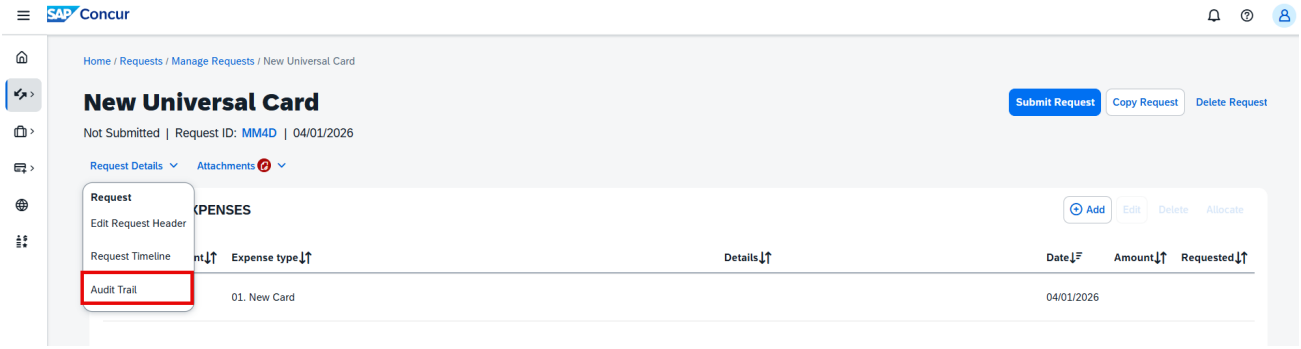
a. The example below is for new card that is within the monthly limit per CSU Payment Card policy.



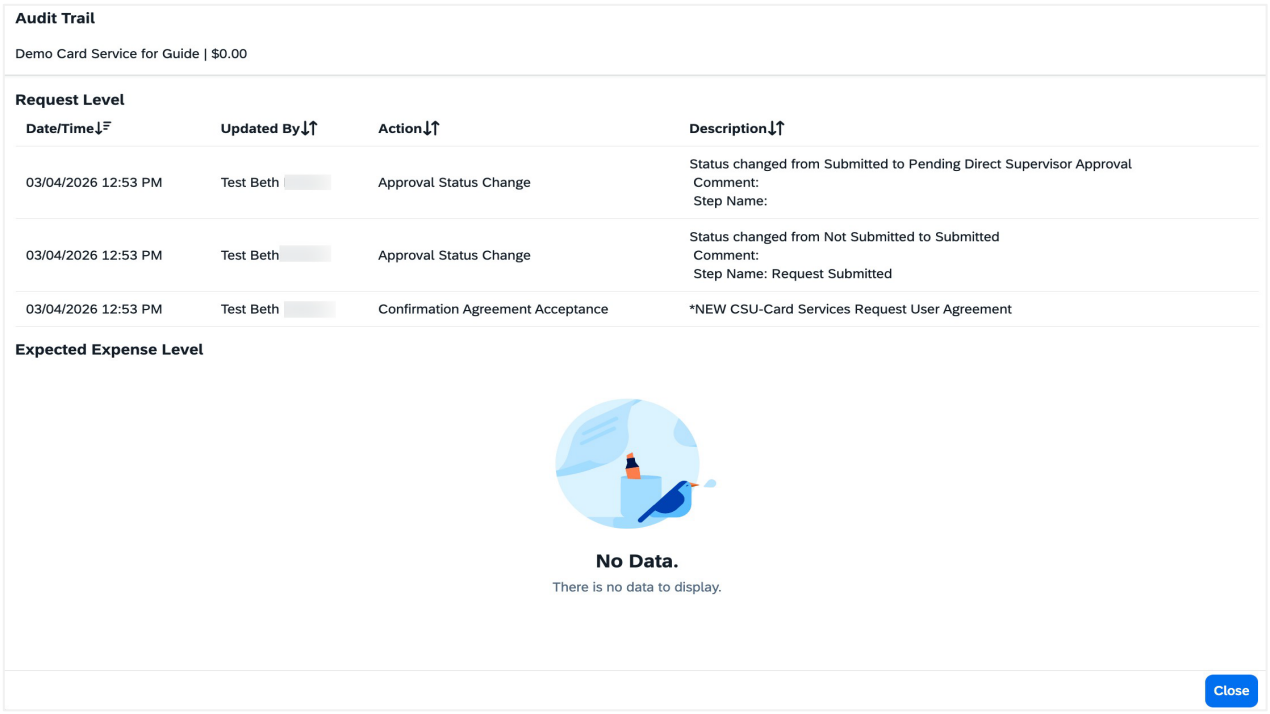
Audit Trail

The audit trail will display the timestamp of certain actions taken on the request.

1. Select **Request Details**, then choose **Audit Trail** to view a detailed record of all actions taken on the request.



2. The date/time of the action and the description will display.



Alert Type

Alerts are messages triggered by certain criteria in your Request. There are different types of alerts.



1. **ERROR**: If an alert displays in red, it is displaying an error. This means an action must be taken before the Request can be submitted.
2. **WARNING**: An orange alert displays communication related to your Request components advising you to read and take action.
   Note: Most orange warnings will not clear; however, they will not prevent the user from submitting the Request.