Columbia University Finance Training

Job Aid: Applying for Temporary Concur Access as an Affiliate

This job aid details the steps on how Affiliates can apply for temporary Concur access. Affiliates can submit a Financial Systems Security Application (FSSA) to obtain Concur access for a maximum period of one year. Affiliates must submit a new FSSA to renew their Concur access after access period has expired.

Affiliates must already be setup with an outside party Vendor profile in order to obtain temporary access to Concur. Refer to the <u>Vendor Management</u> website.

Submitting an FSSA for Temporary Concur Access

1. Navigate to https://columbia.service-now.com/ and select Financial Systems Security Application (FSSA).



- 2. Complete all the required fields designated with an * in the **Section 1: User Information** section.
- 3. Select Columbia Affiliate for the User Type.
- 4. Select the Access begin date required and Access expiration date required for a period no longer than one year.

ks2070	×	Ŧ	Katherine Sheeran	
1.2: User Type				
CU Officer				
CU Support Staff				
CU Casual				
Consultant/Temp - expiration date should not exceed 90 da	iys			
Columbia Affiliate - expiration date should not exceed 1 year	ır]		
*Access begin date required		_		
2020-11-23				Ħ
*Access expiration date required				
2021-10-29				
1.3: Access Type				

5. Indicate the Access Type (New/Update or Replace) and the DAF Department.

* Request Access Type	
New / Update	*
1.4: Select DAF Administrator for departments to which you are requesting access	
* DAF Department:	
Central/General/Finance/Other	*

Columbia University Finance Training

Job Aid: Applying for Temporary Concur Access as an Affiliate

6. Scroll to the 2.2 Procurement – Exception Roles section and select Concur Temporary Access.



Note: No other roles are required for Concur Temporary Access but you can apply for ARC or other procurement roles on the same application, if needed.

The field for Admin Department appears above the Roles options and the Concur Role Type and Vendor ID fields appear below.

7. Type to search and select the Admin Department from the dropdown.

J 1	 1	
*Admin Department		
		¥

8. Select the desired Concur Role Type, Expense Only or Travel Expense. from the dropdown.

Concur Role Type	
None	
	٩
- None -	
Expense Only	
Travel and Expense	

9. If the Affiliate is a registered as a Vendor, enter the Vendor ID, otherwise leave this field blank.

You can use the Vendor Lookup tool to find Vendors and their Vendor ID.

10. Select the User Acceptance check box and click Order Now.

Section 7: Terms of Agreement
* Accept the Terms of Agreement:
0
Access to the University's financial systems is granted solely in conjunction with assigned duties as an employee /consultant/temporary/affiliate of the University. Owners of a Columbia University logon ID are responsible for all use of the ID and password and must comply with all University policies on security, computer access, and confidentiality of data. Failure to follow these policies will result in the loss of computing privileges. Click here for Columbia University IT policies.
In addition, if approval authority is requested, transaction approvers must be familiar with the Departmental Authorization Function ("DAF") policy, understand the responsibilities attendant to this authority, and the obligation to maintain sufficient documentation to substantiate any financial activity for internal and external audits and any related inquiries. Click here for the DAF policy.
By checking the "User Acceptance" button, you acknowledge these policies apply to you or a user for who access has been requested for. Further information regarding these policies is included in the related ARC training courses.
User Acceptance
Public Toron Toron Toron
Jettvery lime: / Days
Order Now

Getting Help

Please contact the Finance Service Center

http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now

https://columbia.service-now.com

00	COLUMBIA UNIVERSITY
	IN THE CITY OF NEW YORK