

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.

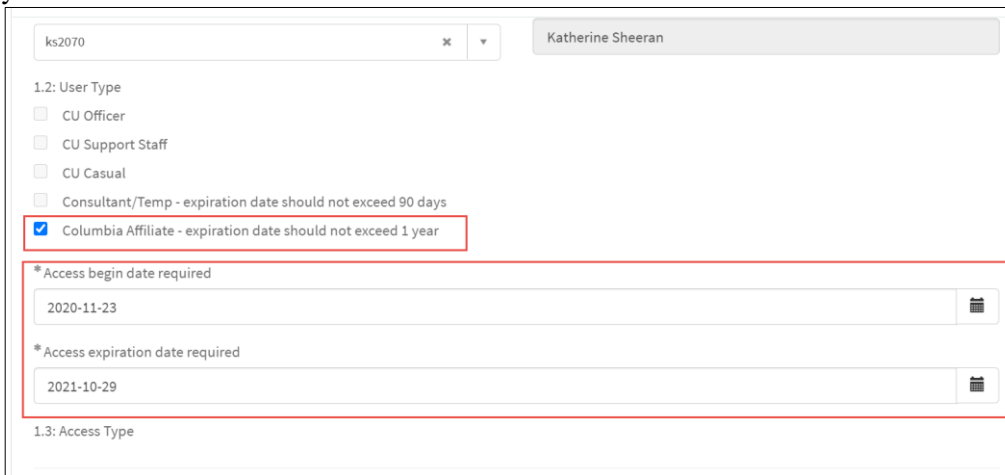
Affiliates must already be setup with an outside party Vendor profile in order to obtain temporary access to Concur. Refer to the [Vendor Management](#) website.

Submitting an FSSA for Temporary Concur Access

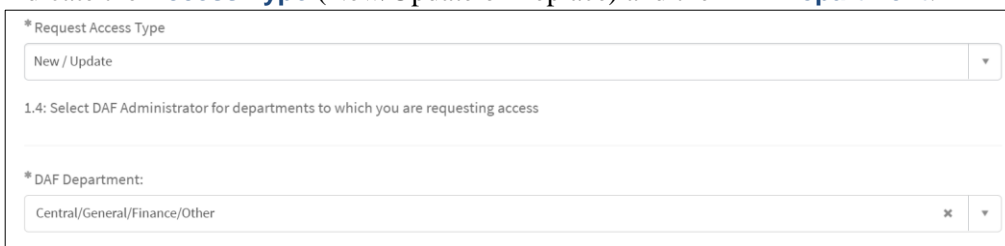
1. Navigate to <https://columbia.service-now.com/> and select **Financial Systems Security Application (FSSA)**.



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.

A screenshot of the 'Section 1: User Information' form in the ServiceNow portal. The user ID is 'ks2070' and the name is 'Katherine Sheeran'. Under '1.2: User Type', the 'Columbia Affiliate - expiration date should not exceed 1 year' option is selected and highlighted with a red box. Below this, the 'Access begin date required' field is set to '2020-11-23' and the 'Access expiration date required' field is set to '2021-10-29', both highlighted with a red box. The '1.3: Access Type' section is partially visible at the bottom.

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

A screenshot of the 'Section 1: User Information' form showing the '1.3: Access Type' section. The 'Request Access Type' dropdown is set to 'New / Update'. Below this is the '1.4: Select DAF Administrator for departments to which you are requesting access' section, which is currently empty. At the bottom, the '* DAF Department:' dropdown is set to 'Central/General/Finance/Other'.

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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.

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

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**.

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>