

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.

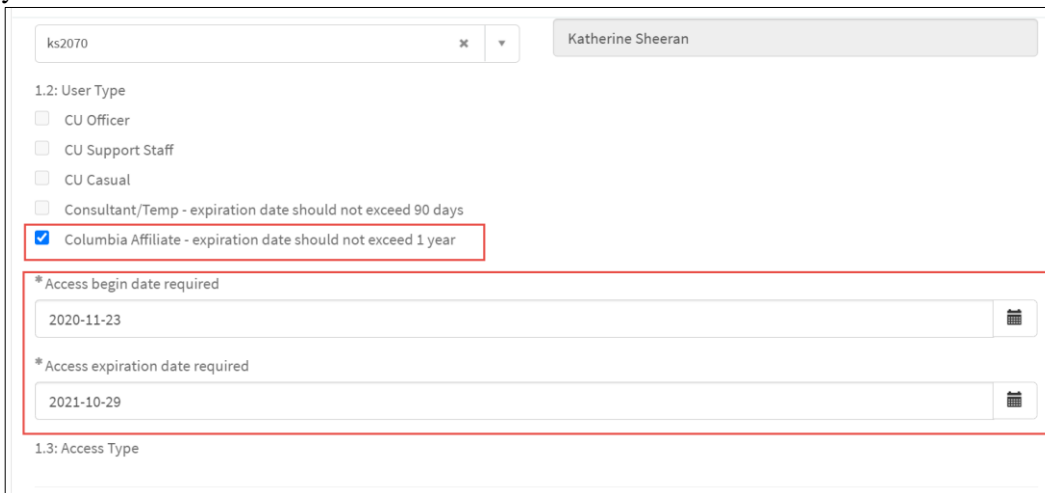
Affiliates must already be setup with an outside party Vendor profile in order to obtain temporary access to Concur. Refer to the information regarding [getting setup as a Columbia Supplier/Payee](#).

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. At the top, there is a user ID field with 'ks2070' and a name field with 'Katherine Sheeran'. Below this is section '1.2: User Type' with radio button options: 'CU Officer', 'CU Support Staff', 'CU Casual', 'Consultant/Temp - expiration date should not exceed 90 days', and 'Columbia Affiliate - expiration date should not exceed 1 year' (which is selected and highlighted with a red box). Below this is section '1.3: Access Type' with two date fields: '* Access begin date required' (with value '2020-11-23') and '* Access expiration date required' (with value '2021-10-29'). Both date fields are highlighted with a red box.

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

A screenshot of the 'Section 1: Access Type' form. It shows a dropdown menu for '* Request Access Type' with 'New / Update' selected. Below this is section '1.4: Select DAF Administrator for departments to which you are requesting access' with an empty text field. At the bottom is a dropdown menu for '* DAF Department:' with 'Central/General/Finance/Other' selected.

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

2.2: Procurement - Exception Roles

Roles:

- Receiver Only (No other Initiator Roles) (Requires Training)
- Requisition Ad Hoc Approver (Requires Training)
- Voucher/Concur Ad Hoc Approver (Requires Training)
- Concur Reporting Manager
- Concur Temporary Access
- Procurement Inquiry Only

2.3: Procurement - P-Cards and Travel & Business Corporate Card Roles ⓘ

Note: Please be advised this is NOT a Card application. ✕

Card Issuance: All Pcard and Travel & Business Corporate Cardholders must obtain the respective card by the approval of this form. In order to obtain the card, the Policy and Procedural Training must be successfully completed. Once the card has been approved, the Pcard or Corporate card application link and instructions will be provided by the Pcard team.

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.

7. Select the **User Acceptance** check box and click **Order Now**.

Section 7: Terms of Agreement

*Accept the Terms of Agreement:

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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

Delivery Time: 7 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>