



# Updating an Existing Travel or PCard

## Scope and Purpose

This guide is intended for all TCU employees who already have a Procurement and/or Travel Card and have access to Concur. This guide provides detailed information on how to request updates to a name on a card due to a legal name change or updates to an account due to an internal position transfer.

## Definitions

### Travel Card

This type of card is designed for travel and allows purchases with vendor types such as hotels, restaurants, and car rental agencies.

### Procurement Card

A type of card designed for the purchase of physical goods, this card will work at most retail stores.

## Process Overview

This section gives a quick overview without screenshots, if you just need a reminder of where to find the request.

### **Step 1: Create a Request in Concur**

Access Concur using your preferred method, and create a request. Choose TCU Card Request and Updates, and select “change to existing card.”

### **Step 2: Add an Expense to Report**

Add an expense to your report, and choose item 3 “Card Name Change,” and complete the applicable fields in the dialogue box that pops up. Click save once all the fields are complete.

### **Step 3: Submit the Report**

Submit the report.



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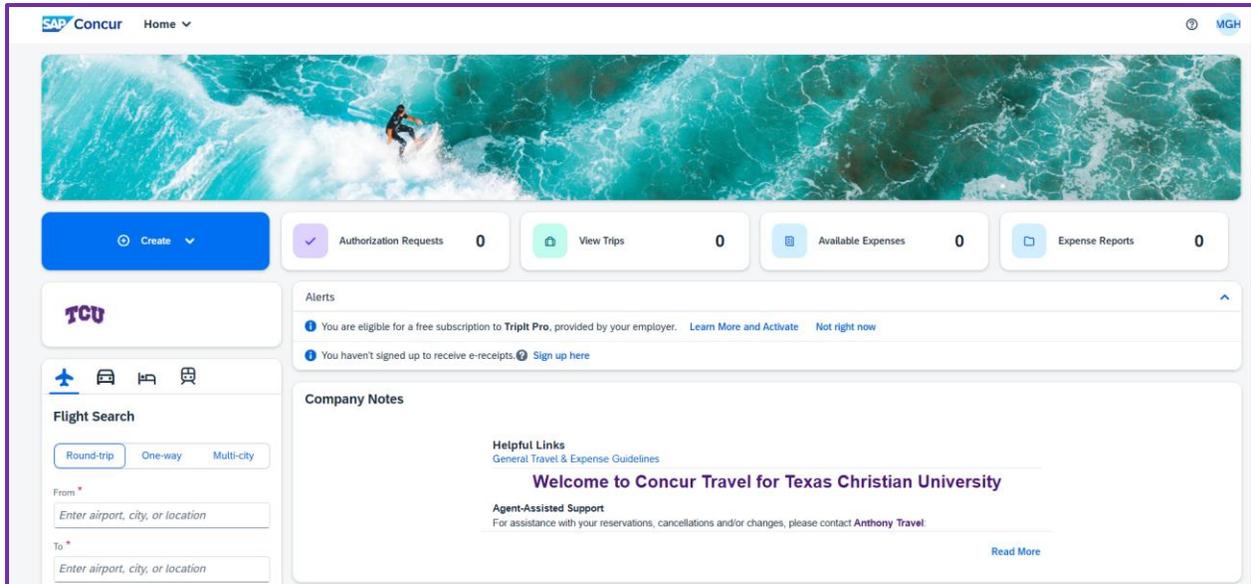


## Step by Step Guide

### Step 1: Access Concur

Navigate to your Concur profile through [MyTCU](#), [tcu.okta.edu](https://tcu.okta.edu), a saved web link, or links found on TCU's Procurement webpage.

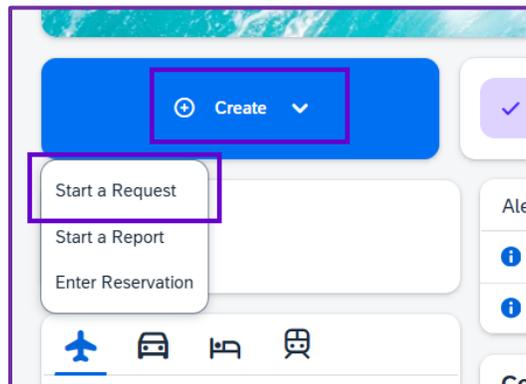
Log in with your SSO if prompted. Your home page should look something similar to this.



### Step 2: Create a New Request

#### **Method 1: From the Homepage**

From your home page, click on the blue “create” button, and select “start a request.”

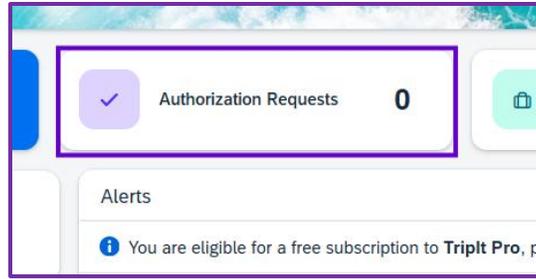


#### **Method 2: Navigate through Manage Requests**

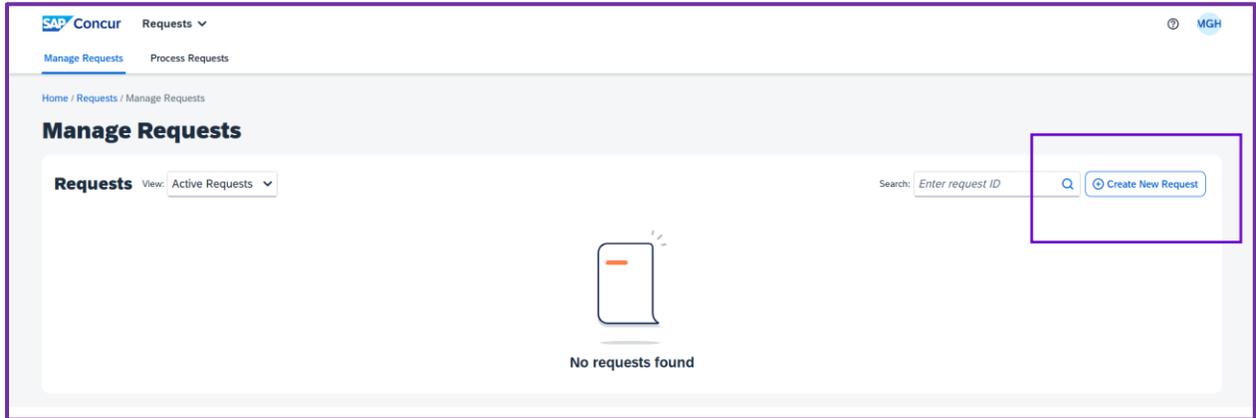
Click Authorizations Requests.



## Updating an Existing Travel or PCard University Card Program



Then click on Create New Request in the upper right-hand corner.





## Step 3: Fill in the New Request Details

A new dialogue box will open after you click on Create New Request.

The screenshot shows a 'Create New Request' dialog box with the following fields and items highlighted:

- Item 1:** Request Type dropdown menu, currently set to '\*TCU Card Request and Updates'.
- Item 2:** Card Request Description text field, containing 'Update Travel Card Name'.
- Item 3:** Card Request Type dropdown menu, currently set to '02. Change to existing card'.
- Item 4:** Completed University Credit Card Compliance Training? dropdown menu, currently set to 'Yes'.
- Item 5:** Business Unit dropdown menu, currently set to '1'.
- Item 6:** The 'Create Request' button in the bottom right corner.

Other visible fields include Fund (2) and Department (3), which are currently empty. A Comment text area is also present at the bottom left.

### **Item 1: Request Type**

Select "TCU Card Request and Updates" in the box labeled 1. This will change all the field names and tell Concur that you are doing a request related to a card.

### **Item 2: Card Request Description**

Enter a TITLE into this field for your request. This can be as simple as "Update Travel Card Name."

### **Item 3: Card Request Type**

Select "02. Change to existing card" for item 3. This will tell Concur you are requesting an update to an existing card.

### **Item 4: Training**

Always select "yes" to indicate you have completed the University training.

### **Item 5: Unit Information**

If this information is not auto-filled, complete this section according to the unit you are assigned to or making the purchases for.

### **Item 6: Create Request**

Review the information you have entered for accuracy, and then click on Create Request in the bottom right-hand corner.

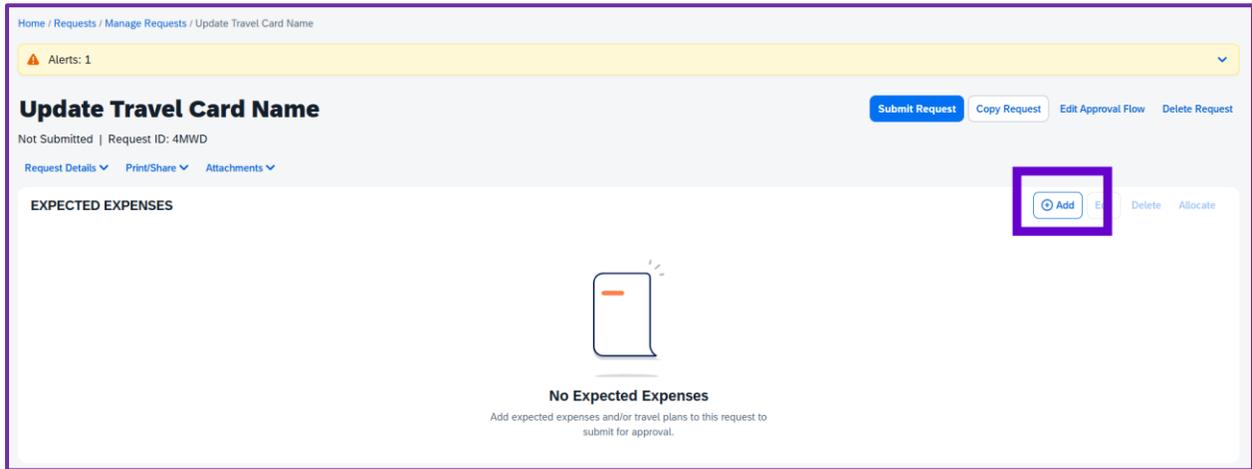


## Step 4: Add an Expense

You have now created a report to request updates to your existing card, but have not submitted it. The next step is to tell the report who kind of card changes you would like to request.

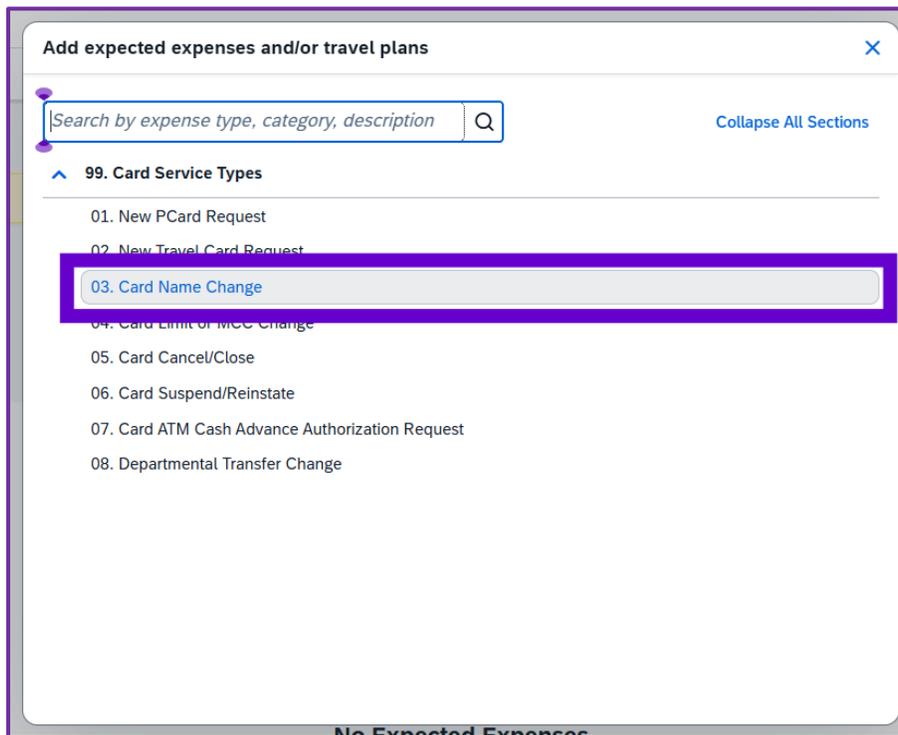
### Item 1: Add an Expense

Click the +Add button in the upper right-hand corner underneath Submit Request.



### Item 2: Select Card Name Change

In the dialogue box that opens, select item number 3: Card Name Change.





### Item 3: Needed by Date

Enter a date the update needs to be by. It is okay to enter today's date if the update should be effective immediately. This request will be processed in the order it is received after all approvals are completed.

### Item 4: Business Justification

Enter in a justification for this update. The most common reasons for card updates are internal transfers and name changes due to marriage, divorce, or other reasons. You do NOT need to enter personal reasons for name changes. Examples include:

- “Update name to match new legal name”
- “Transferred positions within TCU”

### Item 5: Additional information

Enter into item 5 more details regarding your request. Your name in the request is populated from Concur, and may not correctly reflect the change you need. Please include the new or existing name in this field. Examples:

- “Update last name from Smith to Gutierrez”
- “Correct last name to be hyphenated Whitaker-Delgado”
- “Internal transfer to department number 12345 for Lena Morales”

### Item 6: Review and Save

Review the entered information and click save.



## Step 5: Review Details and Submit

Review the details of the report to ensure accuracy.

Check for alerts at the top and ensure there are no errors.

Click on Submit Request.

Home / Requests / Manage Requests / Update Travel Card Name

Alerts: 2

### Update Travel Card Name

Not Submitted | Request ID: 4MWD

Request Details | Print/Share | Attachments

Submit Request Copy Request Edit Approval Flow Delete Request

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Alert	Comment	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>			03. Card Name Change	Update last name to reflect legal name	07/17/2025		



## Reviewing Status

Once you have submitted a request, you can view the status of its approval at any time by navigating to the report found under Manage Requests.

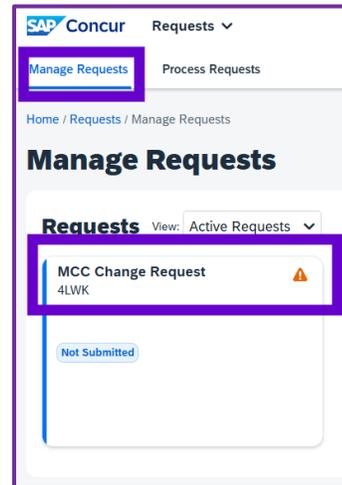
Ensure the report says **SUBMITTED** in green.

Reports that have been approved will say **APPROVED** in green.

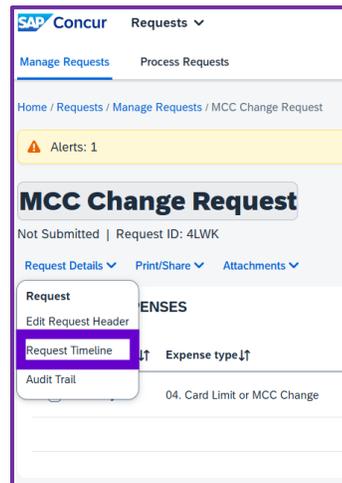
Submitted

Approved

Click on the request you want to view.



Once you enter the report, select Request details in the upper left, and click on Request Timeline to view which step it is at.





## **Resources**

[Concur Travel & Expense Page](#) – Information regarding expenses and traveling

[University Card Programs](#) – University page including Travel and PCard Guides

[Card Compliance Training](#) – University training for card compliance

[concur@tcu.edu](mailto:concur@tcu.edu) – Support for Concur and purchasing cards

[itpurchasing@tcu.edu](mailto:itpurchasing@tcu.edu) – Support for software and online data platform purchases

[contract\\_questions@tcu.edu](mailto:contract_questions@tcu.edu) – Support for contracts with vendors

**JP Morgan Cardholder Support** - 800-316-6056

International Cardholder Support 1-847-488-3748

**Fraud Alert Text Messages** - [Sign Up Website](#)