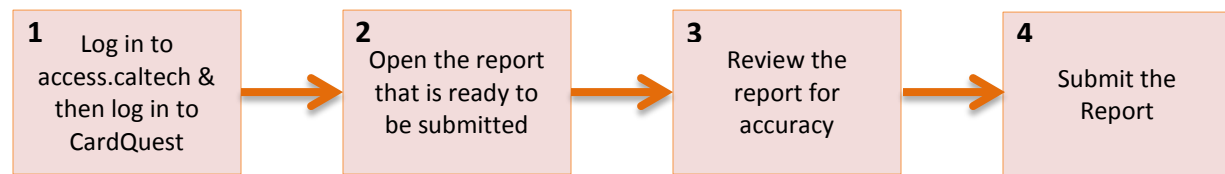


How to Submit an Expense Report in CardQuest

Summary

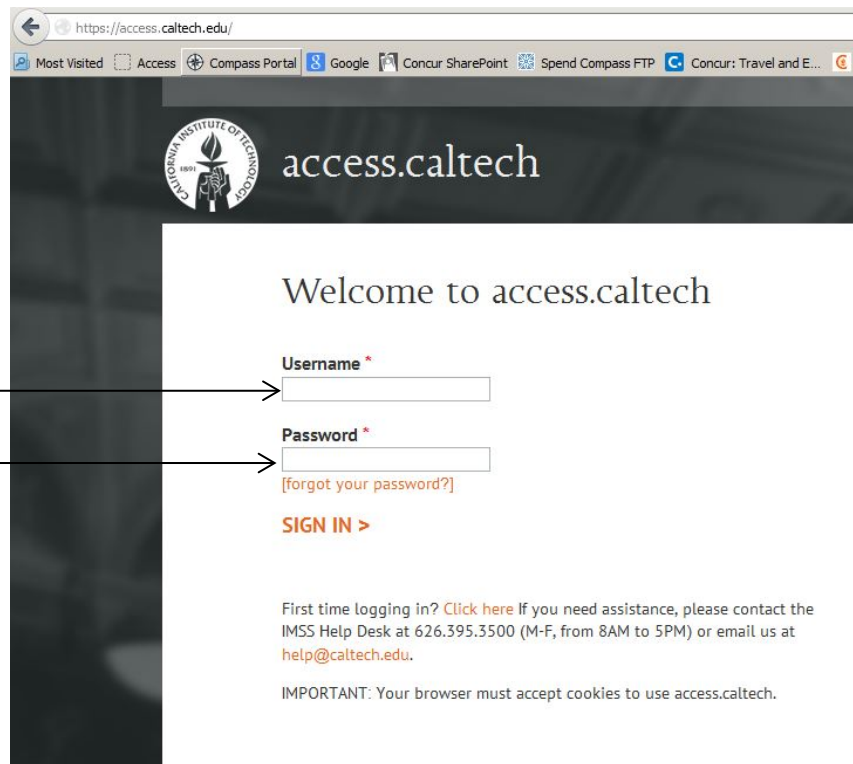
This guide will explain how to submit a report that has been prepared for you by a delegate. Your delegate is someone that has been assigned to your profile in CardQuest and has the ability to create your expense reports in CardQuest. **If you would like the ability to submit your reports via the mobile app**, please email cardquesthelp@caltech.edu and request mobile app instructions.

Procedure



Step 1

1a) Log in to [access.caltech](https://access.caltech.edu) at:
<https://access.caltech.edu>



1b) Click on the **CardQuest** link from the list of applications in **access.caltech** then log in to CardQuest using your access.caltech credentials.

Caltech

Please Login with your access.caltech credentials:

Username:

Password:

Please contact the [IMSS Help Desk](mailto:help@caltech.edu) at help@caltech.edu or x3500 for assistance.

You are requesting access to:

concur

Step 2

After hitting the **Continue** button in step 1b, you will be taken to the CardQuest home page.

Under **Open Reports**, find and click on the report that your delegate has informed you is ready for submission.

The screenshot shows the CardQuest home page for user Cynthia. The navigation bar includes Home, Travel, Expense, Approvals, Reporting, and App Center. The user's name is displayed as 'Hello, Cynthia'. There are several quick action buttons: Start a Report, Upload Receipts, Required Approvals (00), View Trips (00), Available Expenses (00), and Open Reports (02). The 'Open Reports' button is highlighted with a red box. Below the navigation bar, there are sections for TRIP SEARCH, COMPANY NOTES, and MY TASKS. The MY TASKS section shows three items: Required Approvals (00), Available Expenses (00), and Open Reports (02). The Open Reports item is highlighted with a red box and contains a list of reports: 07/07 Traveler, 7/7-7/10, Seattle \$275.00 and 07/01 Traveler, 7/1-7/3, Denver \$300.00. A red box highlights the first report in the list. A red arrow points from the text 'Under Open Reports, find and click on the report that your delegate has informed you is ready for submission.' to the first report in the Open Reports list.

Step 3

After clicking on the report name in **Step 2**, the report will open.

Please **review the charges** in the report to certify that the report correctly describes the actual amount of allowable business expenses incurred in the performance of your assigned duties.

After reviewing the charges, hit the **Submit Report** button. The report has now been submitted and automatically transmitted to your Approver for their review.

Date	Expense	Amount	Requested
06/02/2014	Airfare Alaska Airlines, Seattle, Washington	\$275.00	\$275.00

TOTAL AMOUNT: \$275.00 TOTAL REQUESTED: \$275.00

Exceptions

1. If **corrections are needed** before submitting the report, you can either **make the corrections yourself** in the report or **let your delegate know** the changes that are needed so they can make them for you.
2. If you received any **errors or warnings** after hitting **Submit Report** (for example, missing receipts or allocations) you can **make the corrections yourself** or **contact your delegate** so they can make the necessary corrections before you **submit your report again**.
3. If your **Approver sends back the report** with a request for more information, your delegate will have received an email notification and will work with you to make the changes to the report. After the necessary changes have been made, you can **submit the report again**.

CardQuest Help

Visit the CardQuest webpage:

<https://procurement.caltech.edu/cardquest/>

Email us your questions:

cardquesthelp@caltech.edu

Call the Procurement Services Hotline:

(626) 395-8900

Muriel Sandoval

P-Card and Travel Manager

(626) 395-6273

muriel.sandoval@caltech.edu