



Caltech



How to Submit a Request through SAP Concur

P-Card Change Limit Request

If you experience any issues please contact pcardservices@Caltech.edu

1

Logging In

- Go to access.caltech
- Sign In with your Caltech Credentials

The screenshot shows the Caltech access.caltech login page. At the top left is the Caltech logo and the text 'access.caltech'. Below this is a 'Welcome to access.caltech' message. There are two input fields: 'Username *' and 'Password *'. The password field has a '[forgot your password?]' link below it. A 'Sign In >' button is at the bottom left. On the right side, there is a section titled 'Links to other applications:' with a list of links: AdvanceCaltech, Application Tracking System (Taleo), Box, Caltech Card, Caltech Help, Caltech Ready, CardQuest (highlighted in yellow), and Data Warehouse (Cognos). Each link has a question mark icon to its right.

2

On the Landing Page

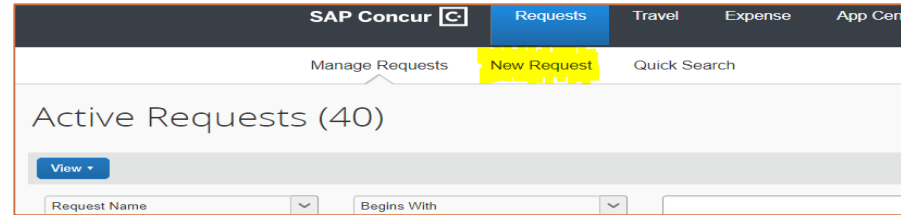
- Click on Requests (upper left hand)

The screenshot shows the SAP Concur CardQuest landing page. At the top, there is a navigation bar with 'SAP Concur' and 'Requests' (highlighted in yellow), along with 'Travel', 'Expense', and 'App Center'. Below the navigation bar is the CardQuest logo and the text 'Hello, Traveler1'. On the right side, there is a '+ New' button. The main content area is divided into three sections: 'MY TRIPS (0)' with a right-pointing arrow and a box containing 'You currently have no upcoming trips.'; 'ALERTS' with two information icons and text: 'As a California Institute of Technology employee, you are eligible for a free...' and 'You haven't signed up to receive e-receipts. Sign up here'; and 'COMPANY NOTES' with a blue header 'Concur Mobile SSO' and two paragraphs of text: 'ATTENTION ALL MOBILE USERS: Concur users can now utilize Single Sign-On in using access.caltech credentials. Please click on the link for step-by-step...' and 'NDAA 889 IMPORTANT NOTICE: Please review the webpage regarding Section 889 Act, which may impact purchases of telecommunications or video surveillance...'.

3

On Active Requests

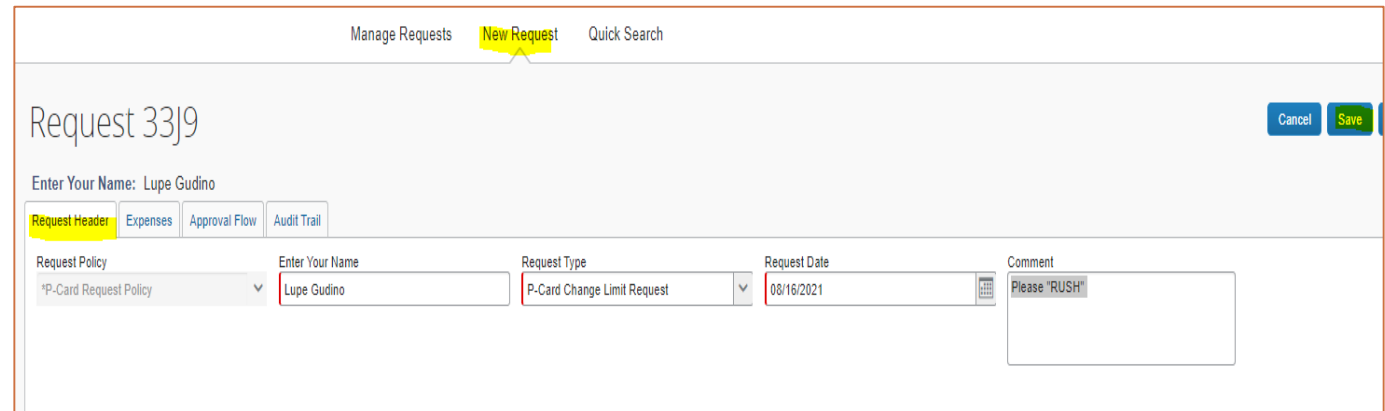
- Click on New Request



4

Request/Request Header Tab

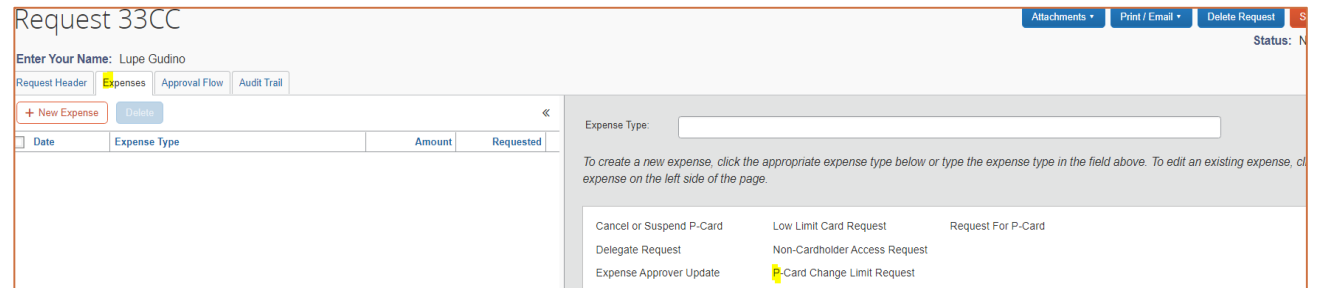
- **Request Policy:** Select *P-Card Request Policy*
- **Enter Your Name:** Even if you are requesting on behalf of someone else, enter your name
- **Request Type:** Select *P-Card Change Limit Request*
- **Comment:** Add comment to expedite or other note
- Click Save



5

After Saving from step 4 You will be taken to the *Expenses Tab*

- Select *P-Card Change Limit Request*
- It will load and take you to Step 6



6

Finishing Request

All RED fields are Required

- **Expense Type:** P-Card Change Limit
- **Cardholder Name:** Who needs change
- **Increase or Decrease** (Select one)
- **Current Single Purchase Limit**
- **Current Monthly**
- **New Single Purchase Limit:** if not Select “Other” and enter amount desired on “Other Single Purchase Limit” field.
- **New Monthly Limit** (Place N/A if you don’t wish to change)
- **New Cash Option** (enter if needed or N/A)
- **Select Permanent or Temporary Increase**
- **Justification:** Explain why the increase or decrease is needed. If Temporary is selected, please include an *END* date.
- **Optional:** Add an attachment: Receipt/Voucher/etc.
- Click Save
- Submit Request

Request 33CC Attachments Print / Email Delete Request Submit Request Status: Not Submitted

Enter Your Name: Lupe Gudino

Request Header Expenses Approval Flow Audit Trail

[+ New Expense](#) [Delete](#)

Date	Expense Type	Amount	Requested
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Expense Type: P-Card Change Limit Request

Request Date: 07/22/2021 Cardholder Name: Michelle Lampe Increase or Decrease Limit: Increase Limit

Current Single Purchase Limit: 5,000.00 Current Monthly Limit: 20,000.00

New Single Purchase Limit: g Other Other Single Purchase Limit: 13,000.00 New Monthly Limit: a N/A

Other Monthly Limit: Other Cash Option Percentage: a N/A

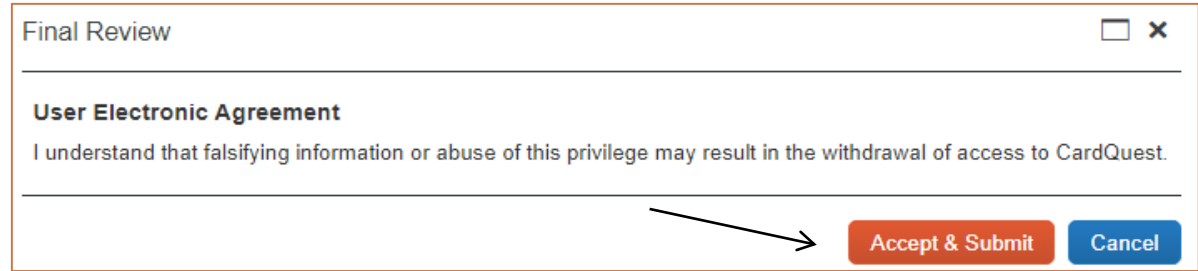
Other Cash Option Percentage: Permanent or Temporary Increase: Temporary Increase Justification: Need to purchase a one time 11k membership fee, please end date increase on 8/15/2021

TOTAL AMOUNT: \$0.00 TOTAL REQUESTED: \$0.00 Save Cancel

7

Final Review “Pop Up Box”

Accept and Submit



Final Review □ ×

User Electronic Agreement
I understand that falsifying information or abuse of this privilege may result in the withdrawal of access to CardQuest.

Accept & Submit Cancel

To view submitted requests please go to your “Manage Requests” Tab

If you encounter any problems, questions or concerns please contact pcardservices@Caltech.edu

We really appreciate your time and efforts in helping us succeed in this new SAP Concur implementation.

~The P-Card Team



THANK YOU!

Caltech