

How to Submit a Request through SAP Concur

Expense Approver Update Request

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



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Logging In

- ➢ Go to <u>access.caltech</u>
- Sign In with your Caltech Credentials

Caltech access.caltech		
Welcome to access.caltech	Links to other applications:	
Username *	✓ AdvanceCaltech⑦)
	 Application Tracking System (Taleo) 	
	✓ Box	
Password *	🖉 Caltech Card 🕜)
	🖉 Caltech Help 🕜	5
[forgot your password?]	🐔 Caltech Ready 🕜	5
Sign In 2	CardQuest (?)

On the Landing Page

Click on Requests (upper left hand)

SAP Concur 🖸	Requests	Travel	Expense	App Center	
Hello, Traveler1	uest				+ New
MY TRIPS (0)		\rightarrow	ALER		
You currently have no upo	coming trips.		1 You h	California Institute of Technology employee, you are aven't signed up to receive e-receipts.	-

On Active Requests

Click on New Request

	SAP Concur 🖸	Requests	Travel Expense	App Cente
	Manage Requests	New Request	Quick Search	
Active Request	s (40)			
View •				
Request Name	✓ Begins With		~	



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 Expense Approver Update
- Comment: Add comment to expedite or other note
- Click Save

Request Enter Your Name:				Cancel Save Print / Emult + Delete Request			Submit Request s: Not Submitted	
Request Header	Expenses	Approval Flow	Audit Trail					
Request Policy			Enter You	r Name	Request Type			
P-Card Reques	st Policy	*	Lupe Gu	dino	Expense Approver Upo	date	~	
Request Date			Comment					
07/26/2021			Please E reconcil	xpedite prior to next monthly ation				



After Saving from Step 4

You will be taken to the Expenses Tab

- Select Expense Approver Update
- It will load and take you to Step 6

Enter Your Name	: Lupe Gudino		
Request Header E	Expenses Approval Flow Audit Trail		
+ New Expense	Delete	×	Expense Type:
Date	Expense Type	Amount Requested	
			To create a new expense, click the a page. Declining Balance Card Request
			Delegate Request Expense Approver Update Low Limit Card Request



Finishing Request All RED fields are Required

- **Expense Type:** Select *Expense Approver*
- > Add or Remove Delegate
- Enter Delegate Name
- Enter Cardholder's Full Name
- Click Save (bottom of screen)



Final Review "Pop Up Box"

Accept and Submit

Request 33CL	Attachments *	Print / Email • Delete Request Submit Reque Status: Not Submitte
Enter Your Name: Lupe Gudino Request Header Expenses Approval Flow Audit Trail New Expense Relate	Expense Type	
Date Expe Amount Requested	Request Date 07/26/2021	User Name Elisa Brink
	Employee ID Number 1234567	Default Department Code (8Q) DN- FINANCE; DEPT- PURCHASING
	New Approver's Name Monica Marquez	Comment Gobelle Vinci is no longer at Callech

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, have questions or concerns please contact <u>pcardservices@Caltech.edu</u>

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

~The P-Card Team



THANK YOU!

