How to Submit a Request through SAP Concur

Expense Approver Update Request

1 Logging In

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

2 On the Landing Page

➢ Click on *Requests* (upper left hand)

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

Request

Cancel | Save | Print / Email | Delete Request | Submit Request

Status: Not Submitted

Enter Your Name:

Request Header | Expenses | Approval Flow | Audit Trail

Request Policy: *P-Card Request Policy

Enter Your Name: Lupe Gudino

Request Type: Expense Approver Update

Request Date: 07/26/2021

Comment: Please Expedite prior to next monthly reconciliation.

5 — 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 | Expenses | Approval Flow | Audit Trail

+ New Expense | Delete

Date	Expense Type	Amount	Requested

Expense Type:

To create a new expense, click the a page.

Declining Balance Card Request
Delegate Request
Expense Approver Update
Low Limit Card Request

6 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)

Request 33CL

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 | Expe... | Amount | Requested |

Expense Type
Expense Approver Update ▼

Request Date
07/26/2021

User Name
Elisa Brink

Employee ID Number
1234567

Default Department Code
(8Q) DIV- FINANCE; DEPT- PURCHASING ▼

New Approver's Name
Monica Marquez

Comment
Gebelle Vinci is no longer at Caltech

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, have questions or concerns please contact pcardservices@Caltech.edu

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

~The P-Card Team

THANK YOU!

Caltech