



Caltech



How to Submit a Request through SAP Concur

Request to Cancel or
Suspend P-Card

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

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Logging In

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

Caltech access.caltech

Welcome to access.caltech

Username *

Password *

[forgot your password?]

Sign In

Links to other applications:

- ✓ AdvanceCaltech
- ✓ Application Tracking System (Taleo)
- ✓ Box
- ✓ Caltech Card
- ✓ Caltech Help
- ✓ Caltech Ready
- ✓ CardQuest

2

On the Landing Page

- Click on *Requests* (upper left hand)

SAP Concur

Requests Travel Expense App Center

CardQuest

Hello, Traveler1

+ New

MY TRIPS (0)

ALERTS

As a California Institute of Technology employee, you are eligible for a free...

You haven't signed up to receive e-receipts. Sign up here

3

On Active Requests

- Click on *New Request*

SAP Concur

Requests Travel Expense App Center

Manage Requests New Request Quick Search

Active Requests (40)

View

Request Name Begins With

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 *Request to Cancel P-Card*
- **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: Request to Cancel P-Card

Request Date: 07/26/2021

Comment:

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After Saving from Step 4

You will be taken to the *Expenses Tab*

- Select *Request to Cancel or suspend P-Card*
- It will load and take you to Step 6

Request 33CH

Attachments Print / Email Delete Request Submit Request

Status: Not Submitted

Enter Your Name: Lupe Guino

Request Header Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expe...	Amount	Requested
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Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- Cancel or Suspend P-Card
- P-Card Change Limit Request
- Delegate Request
- Request For P-Card
- Expense Approver Update
- Low Limit Card Request
- Non-Cardholder Access Request

6

Finishing Request

All RED fields are Required

- **Expense Type:** Select *Cancel* or *Suspend P-Card*
- **Suspension Start Date:** Enter even if cancelling
- **Suspension End Date:** Not needed for cancel
- **Cardholder Name & Employee ID:** Enter
- **Justification:** Provide reason for action
- Click *Save* (bottom of screen)

7

Final Review “Pop Up Box”

Accept and Submit

Request 33CQ

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	Amount	Requested
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Expense Type: Cancel or Suspend P-Card

Cancel or Suspend P-Card?: Cancel

Suspension Start Date: 07/29/2021

Suspension End Date:

Cardholder Name: Leticia Calderon

Employee ID Number: 1234567

Justification: No longer with Caltech

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