

How to Submit
a Request
through
SAP Concur

Request to Cancel or Suspend P-Card

### If you experience any issues please contact <a href="mailto:pcardservices@Caltech.edu">pcardservices@Caltech.edu</a>

1

#### Logging In

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

2

#### On the Landing Page

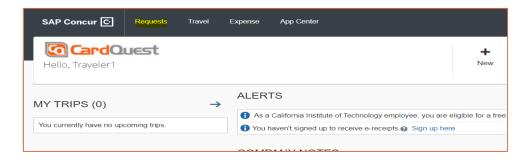
Click on Requests (upper left hand)

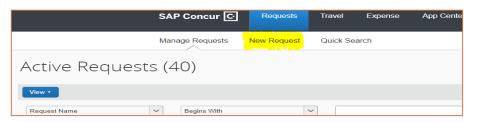
3

#### On Active Requests

> Click on New Request







4

#### Request/Request Header Tab

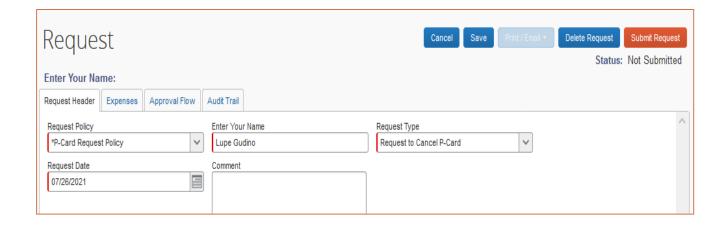
- ➤ **Request Policy**: Select P-Card Request Policy
- > Enter Your Name: Even if you are requesting on behalf of someone else, enter your name
- ➤ **Request Type**: Select Request to Cancel P-Card
- Comment: Add comment to expedite or other note
- ➤ Click Save

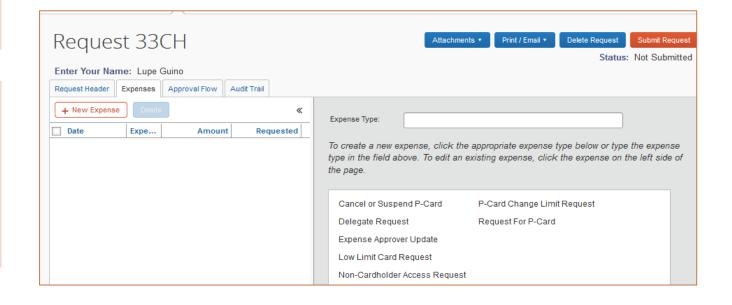
5

#### After Saving from Step 4

You will be taken to the Expenses Tab

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







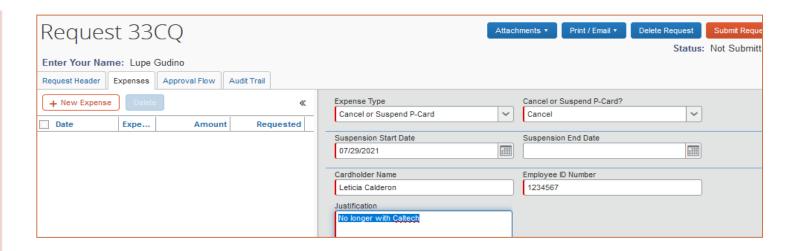
# Finishing Request All RED fields are Required

- **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



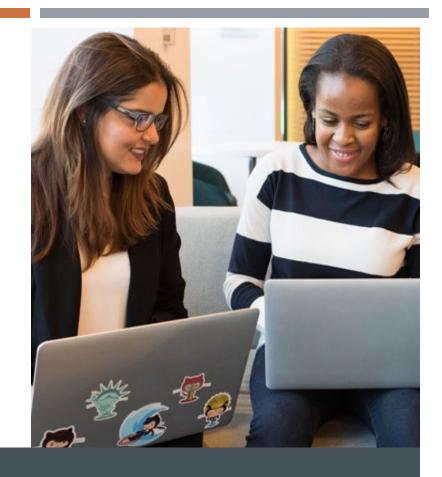


To view submitted requests, please go to your Manage Requests tab.

If you encounter any problems, have questions or concerns please contact <a href="mailto:pcardservices@Caltech.edu">pcardservices@Caltech.edu</a>

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

~The P-Card Team



## THANK YOU!

Caltech