How to Submit a Request through SAP Concur

Caltech

Request for P-Card

If you experience any issues please contact pcardservices@Caltech.edu
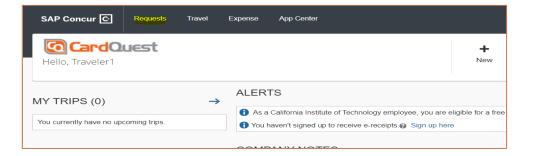
1

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 ⑦
- ☑ Application Tracking System (Taleo) ⑦
- ☑ Box ⑦
- ☑ Caltech Card ⑦
- ☑ Caltech Help ⑦
- ☑ Caltech Ready ⑦
- ☑ CardQuest ⑦

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) →

You currently have no upcoming trips.

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

COMPANY NOTES

3

On Active Requests

➤ Click on *New Request*

SAP Concur | Requests | Travel | Expense | App Cente

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* for *P-Card*
- ➤ **Comment**: Add comment to expedite or other note
- ➤ Click *Save*

Request

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

Status: Not Submit

Enter Your Name:

Request Header | Expenses | Approval Flow | Audit Trail

Request Policy
*P-Card Request Policy ▾

Enter Your Name
Steve Butbi

Request Type
Request for P-Card ▾

Request Date
07/26/2021

Comment
I'm new and would love a p-card asap for my new research

5 — After Saving from step 4

You will be taken to the *Expense 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

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	

3

6 Finishing Request
All RED fields are Required

➢ **Expense Type:** Select Request for *P-Card*

➢ **Select Employee Type:** Staff, Faculty, Student

➢ **Cardholder Role**: Cardholder or Cardholder with Delegate

➢ **Select:** Goods and Services, Travel and cash availability, or all of the above

➢ **Enter** Cardholder Name, phone, ID, PTA, Mail Code, Department Code, e-mail, Approver Name, and approver e-mail address

➢ **Enter** Delegate Name and E-mail Address

➢ Fulfill Travel Arranger if it differs from Delegate if not select same as delegate

➢ Click *Save* (bottom of screen)

Enter Your Name: sdf

Request Header | Expenses | Approval Flow | Audit Trail

+ New Expense | Delete | «

☐ Date	Expense Type	Amount	Requested

Expense Type
Request For P-Card

Request Date	Employee Type	Cardholder Role
08/26/2021	Staff	Cardholder

☐ Goods and Services: Purchase Limit of 3.5K Single & 15K Monthly   ☐ Travel: Travel Purchase Limit of 5K Single & 20K Monthly   ☐ Cash Availability (Travel Use Only)

Cardholder Name	Cardholder Phone Number	Employee ID Number
Steve Butabi	555-619-7766	1234567

Project/Task/Award	Mail Code	Default Department Code
3MT.LIBR/1/GIFT.LIBRARIES (P2468060)	103-2	(7H) DIV- BBE; DEPT- BIOENGINEERING

Email Address	Approver Name	Approver Email Address
sbutabi@caltech.edu	Mike Machintosh	mmachintosh@caltech.edu

☑ Check if no Delegate

Delegate Name	Delegate Email Address

☐ Same as Delegate   ☑ Check if no Travel Arranger

Travel Arranger Name	Travel Arranger Email Address	Travel Arranger Phone

TOTAL AMOUNT $0.00   TOTAL REQUESTED $0.00   **Save**

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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