



**Caltech**



# How to Submit a Request through SAP Concur

Low Limit Card Request

If you experience any issues please contact [pcardservices@Caltech.edu](mailto:pcardservices@Caltech.edu)

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## Logging In

- Go to [access.caltech](https://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 *Low Limit Card Request*
- **Comment:** Add comment to expedite or other note
- Click *Save*

Request

Cancel Save Print / Email Delete Request Submit

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: Low Limit Card Request

Request Date: 07/26/2021

Comment:

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## After Saving from Step 4

You will be taken to the *Expenses Tab*

- Select *Low Limit Card Request*
- 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	Expense Type	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 *Low Limit Card*
- Cardholder Name, Phone & Employee ID
- **Enter:** Mail, department code & e-mail
- **Enter:** Single and Monthly limit
- **Enter:** Approver name and e-mail
- **Enter:** Delegate (if needed)
- Click *Save* (bottom of screen)

Request 33CM

Enter Your Name: Lupe Gudino

Attachments Print / Email Delete Request Submit Request

Status: Not Submitted  
Amount: \$1.00

Request Header Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expe...	Amount	Requested
07/26/2021	Low ...	\$1.00	\$1.00

The value of the Expense Type must match the value of the Request Type in the Request Header.

Expense Type: Low Limit Card Request

Request Date: 07/26/2021  
Cardholder Name: Davida Perez  
Cardholder Phone Number: 6263956235  
Employee ID Number: 1234567  
Mail Code: mc 103-6  
Default Department Code: (80) DIV- FINANCE, DEPT- PURCHASING  
Cardholder Email Address: DPerez@GMAIL.COM  
Single Purchase Limit: 200.00  
Monthly Spend Limit: 800.00

Check if no Delegate

Delegate Name: Delegate Email Address:

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## 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](mailto: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