

How to Submit a Request through SAP Concur

Low Limit Card Request

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



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Logging In

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

Caltech access.caltech	
Welcome to access.caltech	Links to other applications:
lisername *	✓ AdvanceCaltech ()
	Application Tracking System (Taleo)
	✓ Box
Password *	✓ Caltech Card
	🐔 Caltech Help 🕜
[forgot your password?]	🖉 Caltech Ready 🕜
Sign In >	CardQuest ()

On the Landing Page

Click on Requests (upper left hand)



On Active Requests

Click on New Request





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



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

Reque	st				Cancel	Save	Print / Email 🔻	Delete I	Request Status:	Submit Not Su
Enter Your Na	me:									
Request Header	Expenses	Approval Flow	Audit Trail							
Request Policy *P-Card Reques	st Policy	~	Enter You Lupe Gu	r Name dino	 Request Type Low Limit Ca	ard Reque	st	~		
Request Date 07/26/2021			Comment							

Request 33CH	Attachments Print / Email Delete Request Submit Request
Enter Your Name: Lupe Guino Request Header Expenses Approval Flow Audit Trail	Status: Not Submitted
+ 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-CardP-Card Change Limit RequestDelegate RequestRequest For P-CardExpense Approver UpdateLow Limit Card RequestNon-Cardholder Access RequestImage: Card Change Limit Request



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 Header Expenses Approval Flow Audit Trail					Gudino	ne: Lupe Gr	Your Nan	Enter
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Cardholder Email Address Single Purchase Limit DPEREZ@GML.CON Monthly Spend Limit 800.00 Check if no Delegate	Employee ID Numb 1234567 Default Departmer (8Q) DIV- FINANC	Number	Cardholder Phone Nu 6263956235 Mail Code mc 103-6	the value of the	e Type must match uest Header.	of the Expense pe in the Requ	The value o Request Ty	
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		elegate	Check if no Deleg					
Delegate Name Delegate Email Address	Delegate Email Ad		Delegate Name					

7	Final Review "Pop Up Box"
	Accept and Submit

inal Review	🗆 ×
User Electronic Agreement	
I understand that falsifying information or abuse of this privilege may result in the v	ithdrawal of access to CardQuest.
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	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 <u>pcardservices@Caltech.edu</u>

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

~The P-Card Team



THANK YOU!

