



**Caltech**



# How to Submit a Request through SAP Concur

Delegate Request

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

1

### 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 *Delegate Request*
- **Comment:** Add comment to expedite or other note
- Click *Save*

The screenshot shows the 'Request' form with the 'Request Header' tab selected. At the top right are buttons for 'Cancel', 'Save', 'Print / Email', 'Delete Request', and 'Submit Request'. The status is 'Not Submitted'. Below the title, there is a field for 'Enter Your Name:'. The form contains several input fields: 'Request Policy' (dropdown menu showing '\*P-Card Request Policy'), 'Enter Your Name' (text field with 'Lupe Guino'), 'Request Type' (dropdown menu showing 'Delegate Request'), 'Request Date' (calendar icon showing '07/26/2021'), and a 'Comment' text area. Navigation tabs for 'Request Header', 'Expenses', 'Approval Flow', and 'Audit Trail' are visible.

# 5

## After Saving from step 4

You will be taken to the Expenses Tab.

- Select Delegate Request
- It will load and take you to step 6

The screenshot shows the 'Request 33CH' form with the 'Expenses' tab selected. At the top right are buttons for 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request'. The status is 'Not Submitted'. Below the title, there is a field for 'Enter Your Name: Lupe Guino'. The form contains a '+ New Expense' button, a 'Delete' button, and a table with columns 'Date', 'Expe...', 'Amount', and 'Requested'. On the right side, there is an 'Expense Type:' field and a list of expense types: 'Cancel or Suspend P-Card', 'P-Card Change Limit Request', 'Delegate Request', 'Request For P-Card', 'Expense Approver Update', 'Low Limit Card Request', and 'Non-Cardholder Access Request'. A note states: '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.'

# 6

## Finishing Request

All RED fields are Required

- **Expense Type:** Delegate Request
- **Add or Remove Delegate**
- **Enter:** Delegate Name
- **Enter:** Cardholder's Full Name
- **Enter Employee Type:** Select Staff, Student, Faculty
- Save (bottom of screen)

Request 33KX

Attachments Print / Email Delete Request Status

Enter Your Name: Lupe Gudino

Request Header Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
------	--------------	--------	-----------

Expense Type: Delegate Request Request Date: 08/26/2021

Add or Remove Delegate: Add Delegate Delegate Name: Hillary Sanchez

Cardholder Name / User Name: Tina Lowenthal Employee Type: Staff

*Additional provisions may be required if Faculty is selected under employee Type. Please contact [PCardServices@caltech.edu](mailto:PCardServices@caltech.edu) for more information.*

# 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](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