How to Submit a Request through SAP Concur

Caltech

Declining Balance Card Request

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

1

Logging In

➢ Go to access.caltech

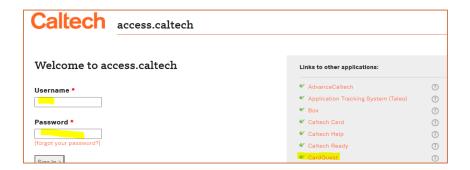➢ Sign In with your Caltech Credentials

Caltech access.caltech
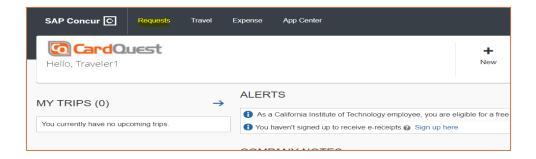
Welcome to access.caltech

Username *

Password *

[forgot your password?]

Sign In >

Links to other applications:

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

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 ▾

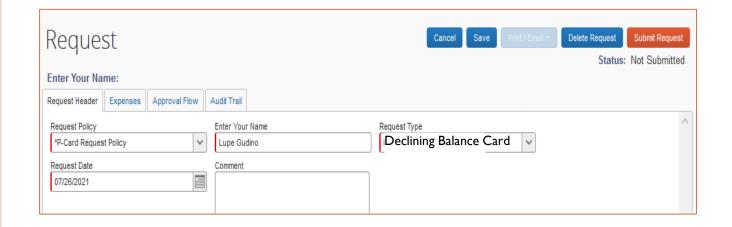| Request Name		Begins With		

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 *Declining Balance Card* Request

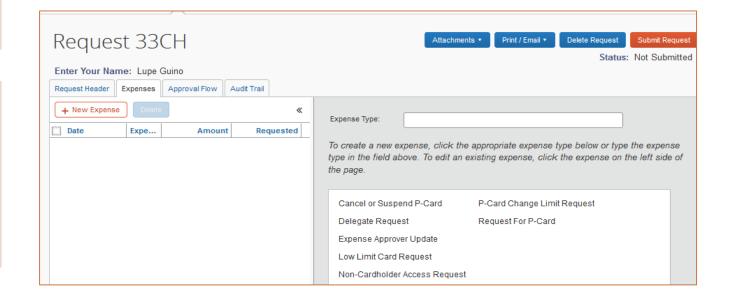➤ **Comment**: Add comment to expedite or other note

➤ Click *Save*

5   After Saving from Step 4

You will be taken to the *Expenses Tab*

➤ Select *Declining Balance Card* Request

➤ It will load and take you to Step 6

Request

Cancel   Save   Print / Email ▾   Delete Request   Submit Request

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
Declining Balance Card ▾

Request Date
07/26/2021

Comment

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
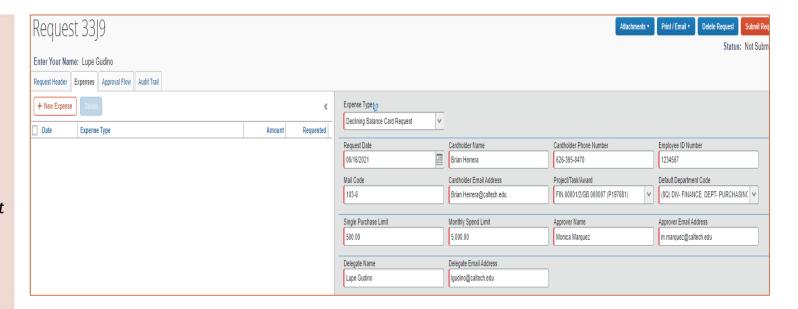
Non-Cardholder Access Request

6 Finishing Request
All RED fields are Required

- ➢ **Expense Type:** Select *Declining Balance Card*
- ➢ **Cardholder Information:** Enter name, number, ID, mail code, e-mail, select PTA, department code
- ➢ **Select:** *Single purchase Limit and Monthly Limit*
- ➢ **Enter:** Approver Name and E-mail
- ➢ Add Delegate information (if needed)
- ➢ Click *Save* (bottom of screen)

Request 33J9

Attachments ▾ Print / Email ▾ Delete Request Submit Req

Status: Not Subm

Enter Your Name: Lupe Gudino

Request Header | Expenses | Approval Flow | Audit Trail

+ New Expense   Delete   «

☐ Date | Expense Type | Amount | Requested

Expense Type ?
Declining Balance Card Request ▾

| Request Date | Cardholder Name | Cardholder Phone Number | Employee ID Number |
| 08/16/2021 | Brian Herrera | 626-395-8470 | 1234567 |

| Mail Code | Cardholder Email Address | Project/Task/Award | Default Department Code |
| 103-6 | Brian.Herrera@caltech.edu | FIN.00001/2/GB.000007 (P197681) ▾ | (8Q) DIV- FINANCE; DEPT- PURCHASING ▾ |

| Single Purchase Limit | Monthly Spend Limit | Approver Name | Approver Email Address |
| 500.00 | 5,000.00 | Monica Marquez | m.marquez@caltech.edu |

| Delegate Name | Delegate Email Address |
| Lupe Gudino | lgudino@caltech.edu |

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