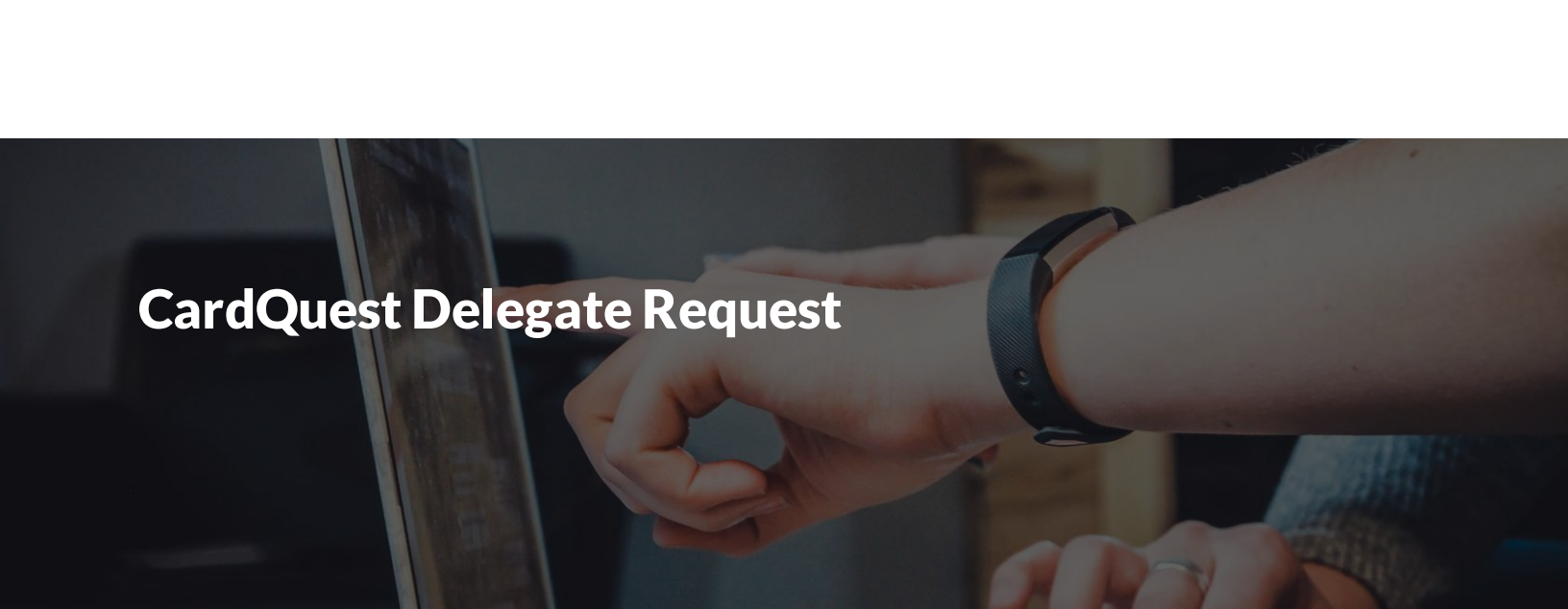


A close-up photograph of a person's hand pointing at a tablet screen. The hand is wearing a black wristband. The background is blurred, showing what appears to be an office or classroom setting.

CardQuest Delegate Request

Caltech

Request is a module within the SAP Concur CardQuest system used by P-Card program participants to submit needed action items. Below are the eight types of Requests that a program participant may submit. In this module, we will cover How to Submit a Delegate Request. Click on the Start button when you are ready to begin. A PDF version of the course is provided at the end; click to download. Close the window when the review of material is completed

- **Delegate Request**
- Declining Balance Card Request
- Expense Approver Update
- Low Limit Card Request
- Non-Cardholder Access Request
- P-Card Change Limit Request
- Request For P-Card
- Request to Cancel or Suspend P-Card

CARDQUEST DELEGATE REQUEST

How to Submit a Delegate Request

Must Know's Before Submitting Delegate Request

- 1 One **MUST** be a CardQuest user to be able to submit a Request. Those who do not have a CardQuest profile will require a teammate to submit on their behalf.
- 2 Providing inaccurate or omitting required information will result in the Request being sent back for revisions and delaying the approval process.
- 3 The symbol * next to the label means that the field is required (no exceptions).
- 4 A Delegate is a person who prepares expense reports on behalf of another Cardholder or Cardholders.
- 5 If one will be reconciling and submitting on behalf of Faculty, the Certification of Delegation of Expense Report Submission Form will need to be attached to the Request. Contact PCardServices@caltech.edu to obtain the form.

Submitting Delegate Request



Accessing CardQuest

Visit access.caltech.edu

Under "Links to other applications," click on CardQuest. A new page will appear where one will then enter their Caltech credentials to access CardQuest.

You are about to access:



CardQuest

Provided by: Caltech Procurement Services

Description: Travel and expense management solution

[Click Here for More Information](#)

Username 

Password 



ATTENTION: If you are using a shared or publicly-accessible computer, be sure to quit/close out of the browser program completely to ensure your session is terminated.

Navigating the Landing Page

Request Module

Click on the "Requests." Under "Manage Requests," click directly on the "Create New Request" button to initiate the Delegate Request.

The image shows two screenshots of SAP interfaces. The top screenshot is the SAP CardQuest dashboard, featuring a navigation bar with 'Requests', 'Expense', and 'Approvals' tabs. A summary section displays statistics: 00 New, 00 Required Approvals, 00 Authorization Requests, 02 Available Expenses, and 00 Open Reports. Below this is a 'COMPANY NOTES' section with a reconciliation deadline for June 16, 2022. The bottom screenshot is the SAP Concur 'Manage Requests' page. It shows a 'REQUEST LIBRARY' with a view filter set to 'Active Requests'. A large button labeled 'Create New Request' is highlighted with a red box and an orange arrow. To the right of the button, text states: 'THERE ARE NO ACTIVE REQUESTS. Click **Create New Request** to create a new request.'

Creating New Request

Request Header

1. **Request Policy Drop-Down:** Select "P-Card Request Policy."
2. **Enter Your Name:** Enter your full name even if one is requesting on behalf of another user.
3. **Request Type Drop-Down:** Select "Delegate Request."
4. **Request Date:** Enter the date that one is submitting the Request.
5. **Comment:** Enter any comment you want the processor to know.
6. Click on "Create Request" button. One will be directed to the "Expected Expenses" window.

SAP Concur | Requests | Travel | Expense | Approvals | Reporting

Create New Request

* Required field

Request Policy *
*P-Card Request Policy

Enter Your Name *
Brian Herrera

Request Type *
Delegate Request

Request Date *
05/26/2022

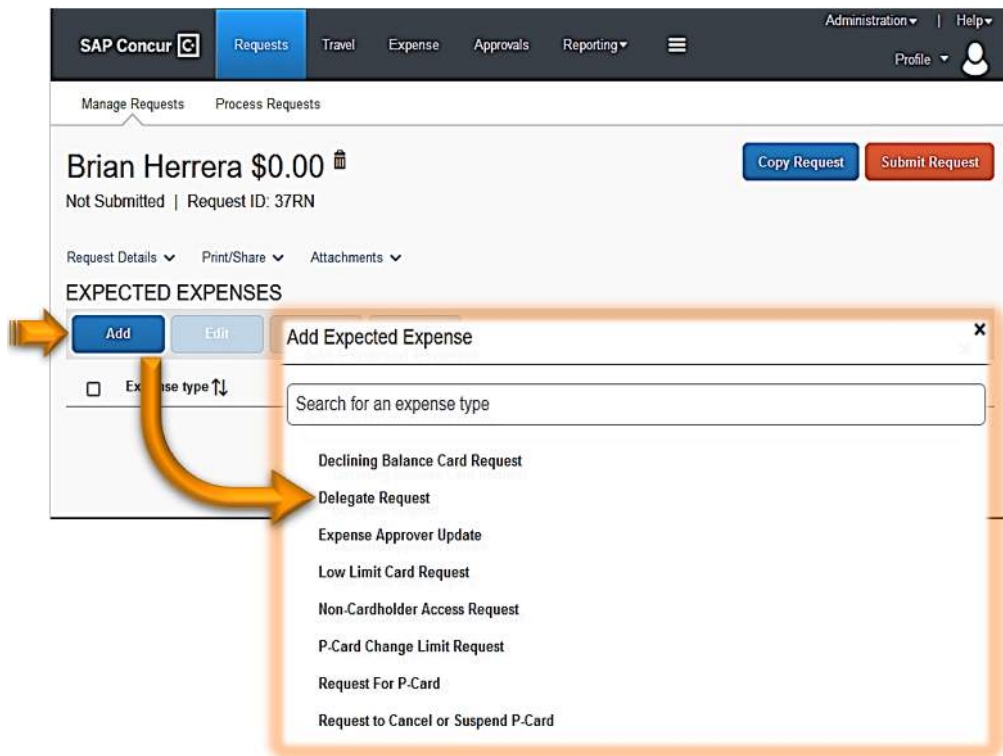
Comment
I will be preparing expense reports for Michelle Lampe; please expedite.

Cancel **Create Request**

Creating New Request cont.

Expected Expenses

1. Click on the "Add" button. The "Add Expected Expense" screen will populate.
2. Select the "Delegate Request."



Creating New Request cont.

New Expense: Delegate Request

1. **Request Date:** Enter the date that one is submitting the Request.
2. **Add or Remove Delegate Drop-Down:** Select "Add Delegate" or "Remove Delegate."
3. **Delegate Name:** Enter the full name of the person who will/not prepare expense reports

on behalf of the Cardholder.

4. **Cardholder Name/User Name:** Enter the Cardholder's full name or user name.

5. **Employee Type Drop-Down:** Select "Staff," "Faculty," or "Student."

6. Click on the "Save" button.

SAP Concur

Requests Travel Expense Approvals Reporting App Center

Profile

Manage Requests Process Requests

New Expense: Delegate Request

05/26/2022

Request Date * 05/26/2022

Delegate Name * Brian Herrera

Employee Type * Staff

Add or Remove Delegate * Add Delegate

Cardholder Name / User Name * Michelle Lampe

Cancel Save

Save Cancel

Completing the Delegate Request

Submit, Accept & Continue

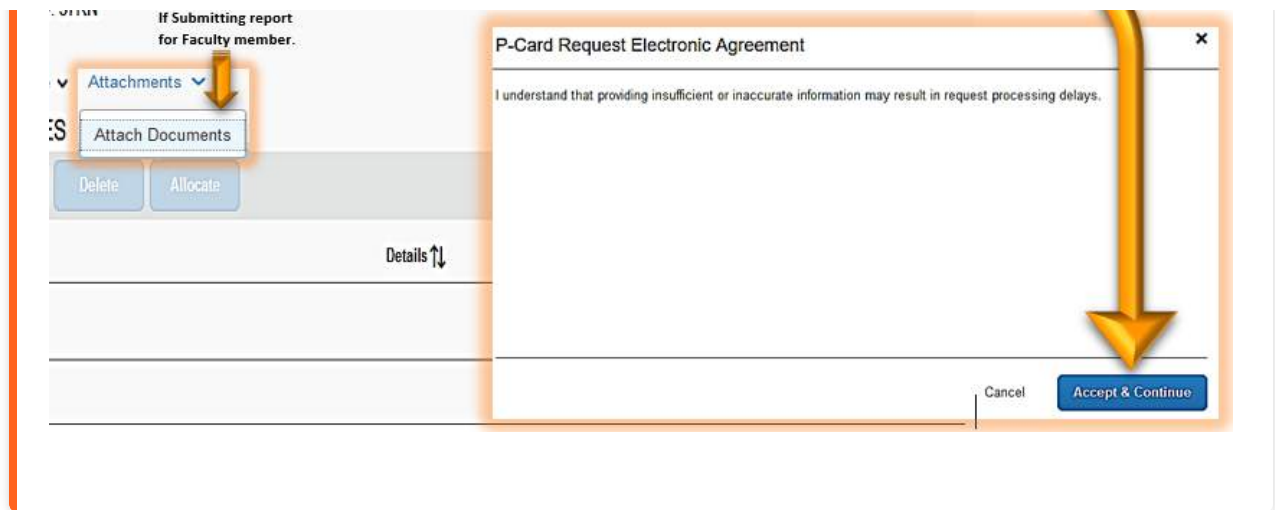
1. **Attachments:** If the delegate will submit reports on behalf of a faculty member, attach the Certification of Delegation of Expense Report Submission Form.
2. Click on the "Submit Request" button. The "P-Card Request Electronic Agreement" screen will populate.
3. Click on the "Accept & Continue" button to acknowledge. Request has been submitted and in Processor Review.

Profile

Requests

\$0.00

Copy Request Submit Request

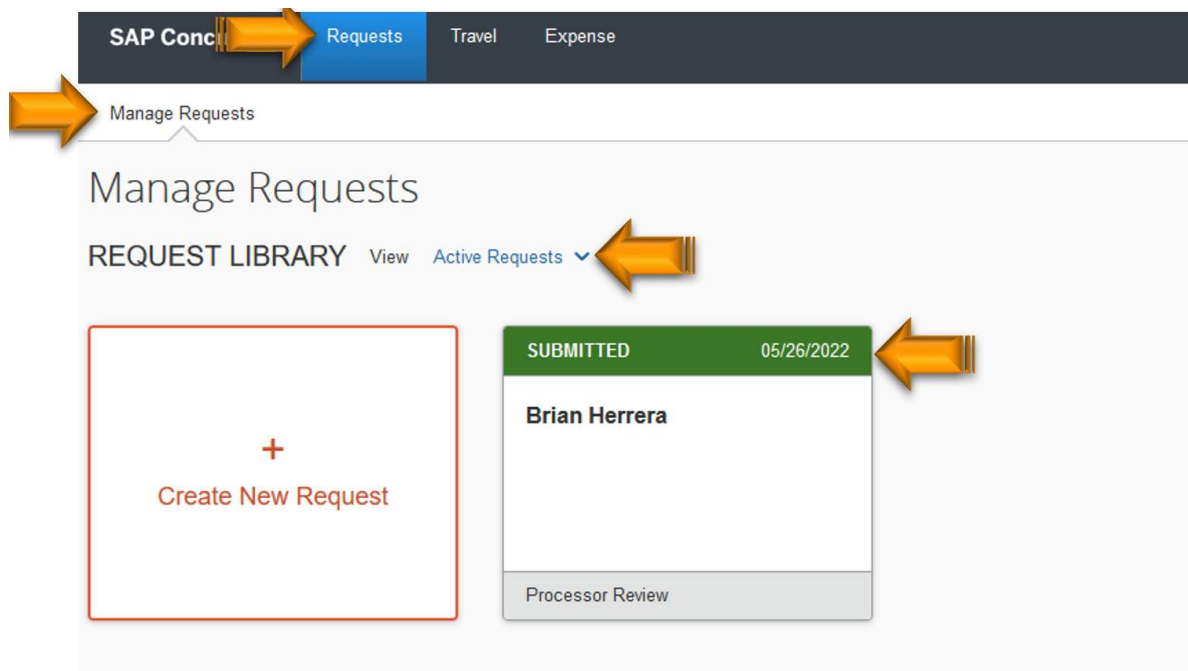


Tracking Request Progress

Manage Request

Active Request

Click on the "Requests" and then on "Manage Requests." Next to Request Library, ensure that the View option is set to "Active Requests." Click directly on the desired request to view information.



Request Timeline

Approval Workflow

1. Click on the "Request Details" drop-down button and select "Request Timeline." A new screen will populate.
2. Under Request Workflow, the user can view the status of the Request. Below are the definitions for each step of the workflow.
 - a. **Processor Review:** Request is with the P-Card Team for review, routing, and processing.
 - b. **Ad-Hoc Approver** (if applicable): Request being reviewed by the Approver of the person needing the changes.
 - c. **User-Added Approver** (if applicable): Request is with Procurement Management Team for further review.

3. If a checkmark is within the circle for one of the workflows, that step has been fulfilled. Click on the "Close" button to return to the previous screen.

The screenshot shows the 'Request Timeline' modal for a request by Brian Herrera for \$0.00. The modal is divided into two main sections: 'Approval Flow' and 'Request Summary'. The 'Approval Flow' section shows a vertical sequence of three steps: 'Processor Review' (marked with a green checkmark), 'Ad Hoc Approver', and another 'Processor Review'. The 'Request Summary' section contains a table of request history with columns for status, user, and date.

Status	User	Date
REQUEST COMMENT	Herrera, Brian	05/26/2022
I will be preparing expense reports for Michelle Lampe; please expedite.		
SUBMITTED	Herrera, Brian	05/27/2022
PROCESSOR REVIEW	Herrera, Brian	05/27/2022
SUBMITTED	Herrera, Brian	05/27/2022
PROCESSOR REVIEW	Herrera, Brian	05/27/2022

Orange arrows indicate the flow from the 'Request Details' dropdown menu to the 'Request Timeline' modal, and from the 'Close' button back to the main request page.

Have questions or concerns about using Request? Don't hesitate to get in touch with PCardServices@caltech.edu for assistance.