



CardQuest Expense Approver Update Request



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 Expense Approver 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 EXPENSE APPROVER UPDATE REQUEST

How to Submit a Expense Approver Update Request

Must Know's Before Submitting Expense Approver 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 The Request will require approval by the cardholder's newly assigned authorized expense approver.
- 5 Request sitting in an expense approver's queue for more than five days will result in the Request being sent back to the Requestor having the action item delayed.

Submitting Expense Approver Update 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

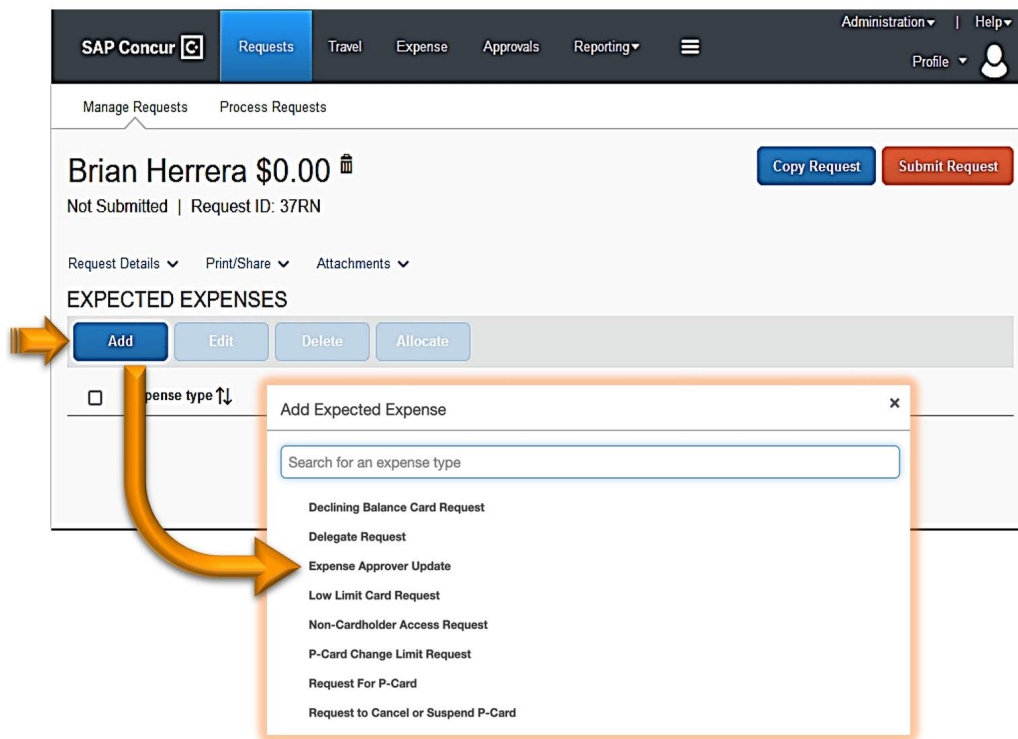
Click on the "Requests." Under "Manage Requests," click directly on the "Create New Request" button to initiate the Expense Approver Update Request.

The image displays two screenshots of SAP financial systems. The top screenshot is the SAP CardQuest interface, featuring a navigation bar with 'Requests', 'Expense', and 'Approvals' tabs. A summary section shows counts for 'New', 'Required Approvals', 'Authorization Requests', 'Available Expenses', and '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 box contains a red plus sign and the text 'Create New Request', which is highlighted by an orange arrow. To the right, a message states 'THERE ARE NO ACTIVE REQUESTS' and provides a link to 'Create 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 "Expense Approver Update 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.



Creating New Request cont.

New Expense: Expense Approver Update Request

1. **Request Date:** Enter the date that one is submitting the Request.
2. **Cardholder Information:** Enter the Cardholder's full name or user name, Caltech ID number, and department code.
3. **Approver Information:** Enter the new approver's full name.

4. **Comment:** Enter any comment you want the processor to know.

5. Click on the "Save" button.

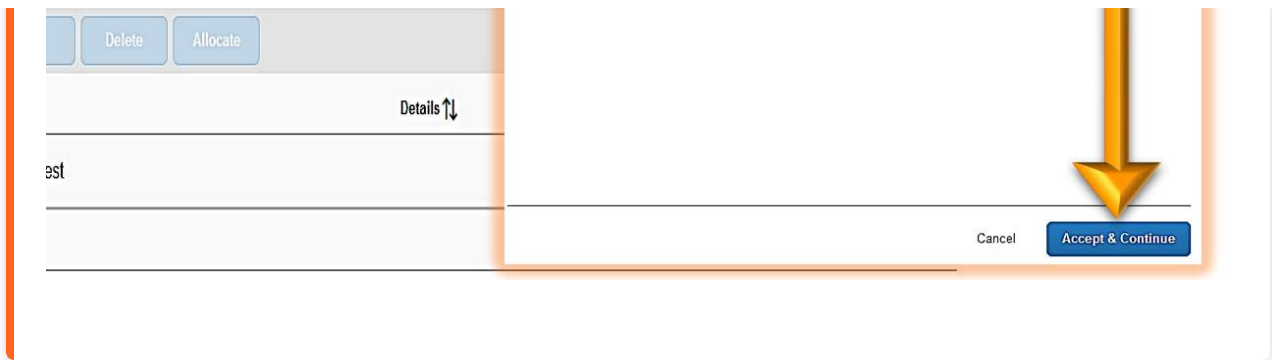
The screenshot shows a web form titled "New Expense: Expense Approver Update" with a date of 07/06/2022. At the top right are "Cancel" and "Save" buttons. The form contains several input fields: "Request Date" (07/06/2022), "Employee ID Number" (2167074), "New Approver's Name" (Lupe Gudino), "User Name" (Brian Herrera), and "Default Department Code" ((8Q) DIV- FINANCE; DEPT- PURCHASING). A "Comment" box contains the text: "List expense approver departed. Assign Lupe Gudino as my new approver." At the bottom left are "Save" and "Cancel" buttons. Orange arrows point to each of these seven elements.

Completing the Expense Approver Update Request

Submit, Accept & Continue

1. Click on the "Submit Request" button. The "P-Card Request Electronic Agreement" screen will populate.
2. Click on the "Accept & Continue" button to acknowledge. Request has been submitted and in Processor Review.

The screenshot shows a navigation bar with "Requests", "Travel", "Expense", "Approvals", "Reporting", and "App Center". Below the bar, the text "Process Requests" is visible. A large orange arrow points from the "Submit Request" button in the previous screenshot to the "Submit Request" button on this screen. The screen displays a balance of "\$0.00" and a request ID of "37RN". At the bottom, there is a "P-Card Request Electronic Agreement" section with a checkbox and the text: "I understand that providing insufficient or inaccurate information may result in request processing delays." Orange arrows point to the "Submit Request" button and the agreement text.

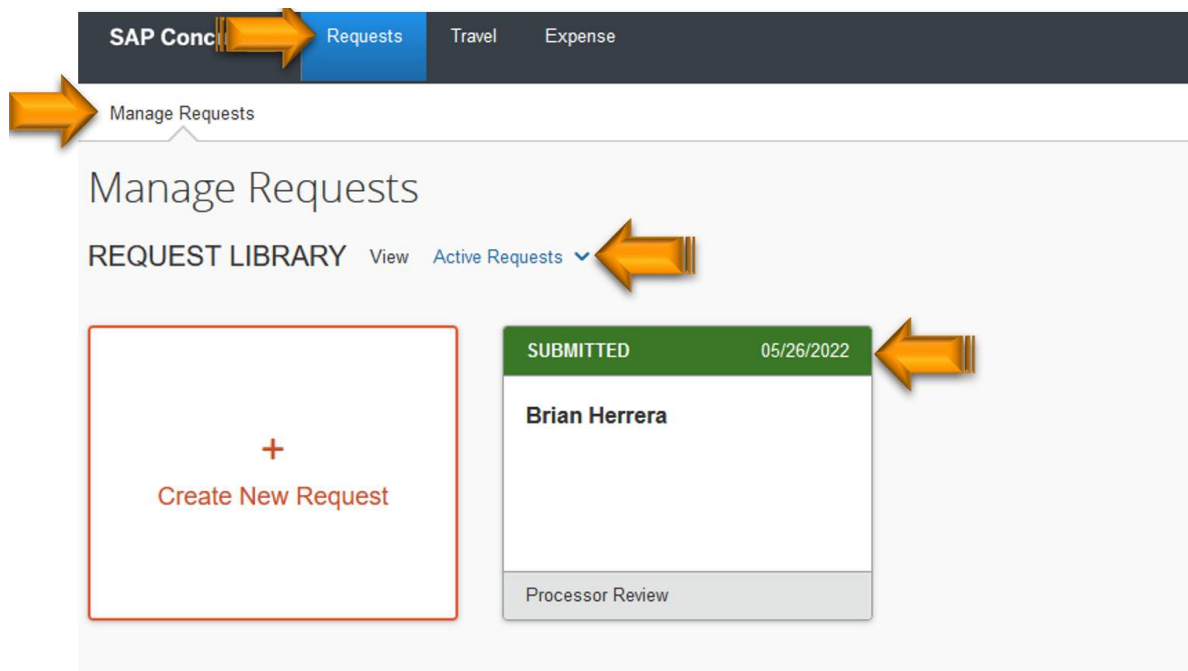


Tracking Request Progress

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 a web application interface for managing requests. At the top, there are tabs for "Manage Requests" and "Process Requests". Below these, the user's name "Brian Herrera" and the amount "\$0.00" are displayed, along with the status "Processor Review" and "Request ID: 37RN". A "More Actions" dropdown and a "Recall" button are also visible. A sidebar on the left contains a "Request" menu with options: "Request Header", "Request Timeline", and "Audit Trail". An orange arrow points to the "Request Timeline" option. The "Request Timeline" modal is open, showing an "Approval Flow" on the left and a "Request Summary" on the right. The "Approval Flow" shows a sequence of steps: "Processor Review" (checked), "Ad Hoc Approver", and "Processor Review". The "Request Summary" shows a "REQUEST COMMENT" and three "SUBMITTED" entries, all dated 05/27/2022. An orange arrow points to the "Close" button at the bottom right of the modal.

Manage Requests Process Requests

Brian Herrera \$0.00

Processor Review | Request ID: 37RN

More Actions Recall

Request Details Print/Share Attachments

Request

Request Header

Request Timeline

Audit Trail

EXPENSES

Request Timeline

Brian Herrera | \$0.00

Approval Flow

Processor Review

Ad Hoc Approver

Processor Review

Request Summary

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

Close

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