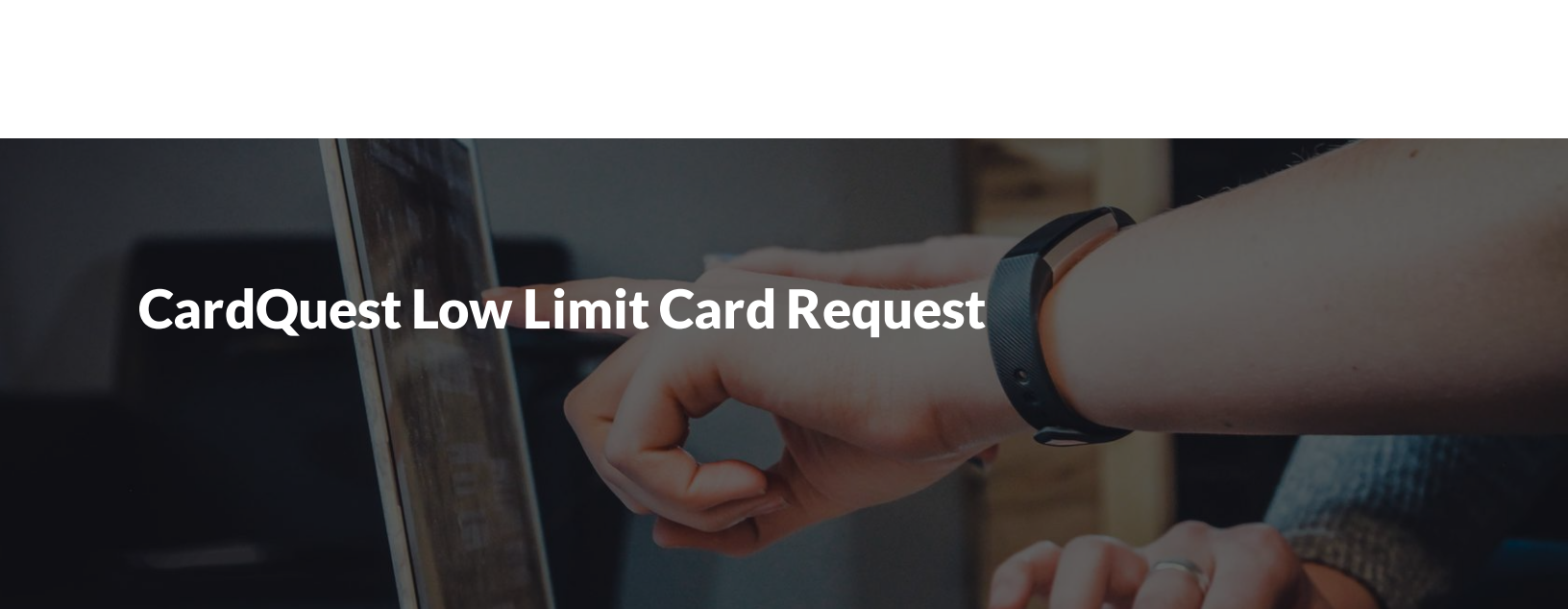


A close-up photograph of a person's hand pointing at a tablet screen. The hand is wearing a black wristband. The background is blurred, showing what appears to be an office or classroom setting.

CardQuest Low Limit Card 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 Low Limit Card 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 LOW LIMIT CARD REQUEST

How to Submit a Low Limit Card Request

Must Know's Before Submitting Low Limit Card 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 Low Limit Card is issued to an individual or division/department with a low monthly limit. Department cards will be tied to an existing Cardholder.
 - 5 The Request will require approval by the assigned authorized expense approver.
 - 6 The P-Card Policy Acknowledgement Form must be completed by the Cardholder, which the Requestor will need to attach to the Request. The downloadable form is found below.
-

Submitting Low Limit Card 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 

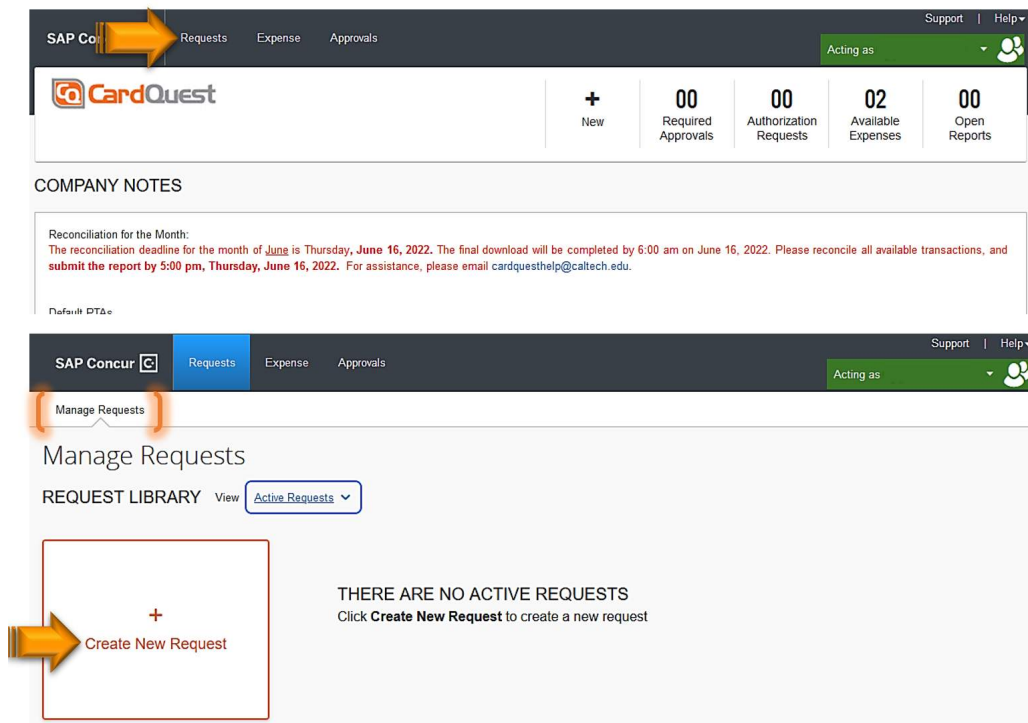


ATTENTION: If you are using a shared or publicly-accessible computer, be sure to quit/close out of the browser program completely to ensure your session is terminated.

Navigating the Landing Page

Request Module

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

The screenshot shows a web form titled "Create New Request" with a close button (X) in the top right corner. A legend indicates that an asterisk (*) denotes a required field. The form contains the following fields and annotations:

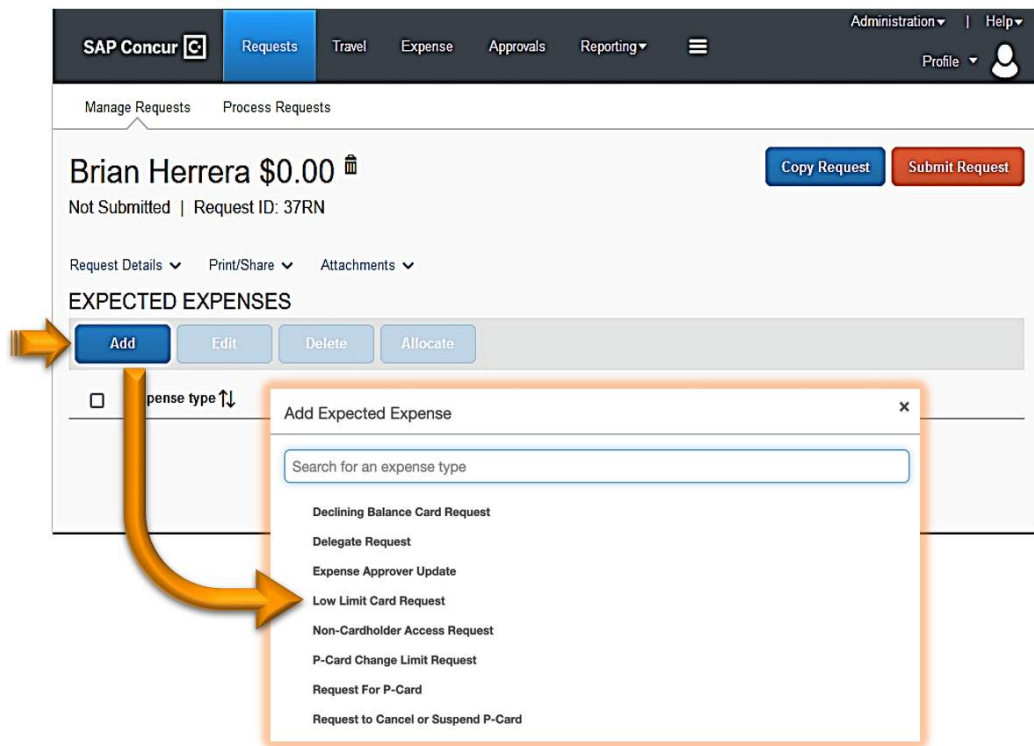
- Request Policy ***: A dropdown menu with the selected option being "*P-Card Request Policy". An orange arrow points to this field.
- Enter Your Name ***: A text input field containing "Brian Herrera". An orange arrow points to this field.
- Request Type ***: A dropdown menu with the selected option being "Low Limit Card Request". An orange arrow points to this field.
- Request Date ***: A date input field containing "07/06/2022" with a calendar icon to its right. An orange arrow points to this field.
- Comment**: A large text area containing the text "Requesting a low limit card for a new staff member. The limits will be lower than the basic G&S limits." An orange arrow points to this field.

At the bottom right of the form, there are two buttons: a "Cancel" button and a blue "Create Request" button. A large orange arrow points down towards the "Create Request" button.

Creating New Request cont.

Expected Expenses

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



Creating New Request cont.

New Expense: Low Limit Card Request

1. **Request Date:** Enter the date that one is submitting the Request.
2. **Cardholder Information:** Enter the Cardholder's name, phone, Caltech ID number, mail code, email, PTA, and department code.
3. **Limits:** Establish and enter the Cardholder's single purchase and monthly limit.
4. **Approver Information:** Enter the approver's full name and email.
5. **Delegate Information:** Enter the delegate's full name, phone, and email. This person will prepare expense reports on behalf of the Cardholder. Check the box if there will not be a delegate assigned.

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

7. Click on the "Save" button.

The screenshot shows a web form titled "New Expense: Low Limit Card Request" with a "Cancel" and "Save" button in the top right. The form is divided into several sections. The first section contains fields for "Request Date" (07/06/2022), "Cardholder Name" (John Doe), "Cardholder Phone Number" ((123) 456-7890), "Employee ID Number" (123456), "Mail Code" (MC 103-6), "Project/Task/Award" (FIN.00006/1.2/GB.000007 (P197772)), "Default Department Code" ((8Q) DIV- FINANCE; DEPT- PURCHASING), "Cardholder Email Address" (JDoe@caltech.edu), "Single Purchase Limit" (\$ 1,000.00), "Monthly Spend Limit" (\$ 2,500.00), "Approver Name" (Brian Herrera), and "Approver Email Address" (BHerrera@caltech.edu). Below this is a checkbox "Check if no Delegate". The next section contains "Delegate Name" (Lupe Gudino), "Delegate Email Address" (LGudino@caltech.edu), and "Delegate Phone" ((123) 456-7890). The final section is a "Comment" box containing the text "Requesting a low limit card for a new staff member. The limits will be lower than the basic G&S limits." At the bottom are "Save" and "Cancel" buttons. Yellow arrows point to the following fields: Request Date, Cardholder Name, Cardholder Phone Number, Employee ID Number, Mail Code, Project/Task/Award, Default Department Code, Cardholder Email Address, Single Purchase Limit, Monthly Spend Limit, Approver Name, Approver Email Address, Delegate Name, Delegate Email Address, Delegate Phone, and the Comment box. A small "1" icon is visible next to the Project/Task/Award field.

Completing the Low Limit Card Request

Attach, Submit, Accept & Continue

1. **Attachments:** Attach the P-Card Policy Acknowledgement Form (completed by the cardholder) here.

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.

The screenshot shows a web interface for processing requests. At the top, there is a navigation bar with a "Profile" dropdown. Below it, the page title is "Process Requests". On the left, there is a sidebar with a "Print/Share" dropdown, an "Attachments" dropdown, and a "PENSES" section with buttons for "Edit", "Delete", and "Allocate". The main content area displays a request ID "37RN" and a balance of "\$0.00". A red "Submit Request" button is highlighted with an orange arrow pointing to it. Below the button, there is a modal window titled "P-Card Request Electronic Agreement". The modal contains a text area with the text "I understand that providing insufficient or inaccurate information may result in request processing delays." and a "Cancel" button. An orange arrow points from the "Submit Request" button to the "Accept & Continue" button at the bottom right of the modal.

Process Requests

Profile

Copy Request Submit Request

Print/Share Attachments Attach Documents

PENSES Edit Delete Allocate

Details

quest

P-Card Request Electronic Agreement

I understand that providing insufficient or inaccurate information may result in request processing delays.

Cancel Accept & Continue

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.

The screenshot shows the SAP Concur interface for managing requests. At the top, a navigation bar includes 'SAP Concur', 'Requests', 'Travel', and 'Expense'. An orange arrow points to the 'Requests' tab. Below this, a 'Manage Requests' section is visible, with another orange arrow pointing to its title. Under 'Manage Requests', there is a 'REQUEST LIBRARY' section with a 'View' dropdown menu set to 'Active Requests'. An orange arrow points to this dropdown. To the left of the request list is a box with a red border containing a plus sign and the text 'Create New Request'. To the right is a request card for 'Brian Herrera' with a green header bar showing 'SUBMITTED' and the date '05/26/2022'. An orange arrow points to this card. At the bottom of the card, it says 'Processor Review'.

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' interface for a request by Brian Herrera for \$0.00. The interface includes a top navigation bar with 'Manage Requests' and 'Process Requests' tabs. Below the navigation bar, the request details are displayed: 'Brian Herrera \$0.00' and 'Processor Review | Request ID: 37RN'. A 'More Actions' dropdown menu and a 'Recall' button are also visible.

The 'Request Timeline' dropdown menu is open, showing options: 'Request', 'Request Header', 'Request Timeline', and 'Audit Trail'. The 'Request Timeline' option is selected, and the 'Request Timeline' panel is displayed.

The 'Request Timeline' panel shows the 'Approval Flow' and 'Request Summary'.

Approval Flow:

- Processor Review (checked)
- 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

A 'Close' button is located at the bottom right of the 'Request Timeline' panel.

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