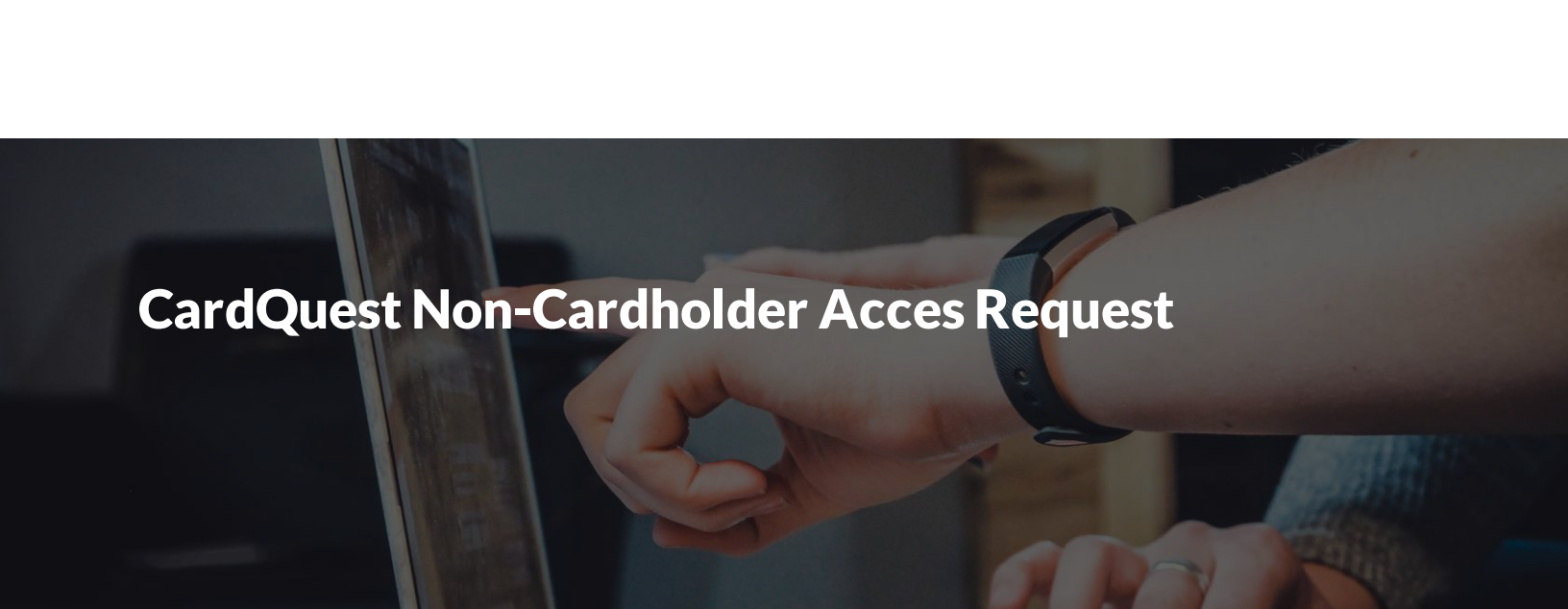




CardQuest Non-Cardholder Access Request



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 Non-Cardholder Access 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 NON-CARDHOLDER ACCESS REQUEST

How to Submit a Non-Cardholder Access Request

Must Know's Before Submitting Non-Cardholder Access 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 is for individuals who will not be cardholders but will require CardQuest access to fulfill the role of an approver, expense user, or travel booking user.
 - 5 The Request will require approval by the assigned authorized expense approver.
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Submitting Non-Cardholder Access 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 Non-Cardholder Access 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, showing 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. The text 'THERE ARE NO ACTIVE REQUESTS' and 'Click Create New Request to create a new request' is displayed next to the button.

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 "Non-Cardholder Access 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.

Create New Request



* Required field

Request Policy *

*P-Card Request Policy

Enter Your Name *

Brian Herrera

Request Type *

Non-Cardholder Access Request

Request Date *

07/06/2022

Comment

New Employee needs CardQuest access to reconcile on behalf of academic faculty

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 "Non-Cardholder Access Request."

Manage Requests | Process Requests

Brian Herrera \$0.00

Not Submitted | Request ID: 37RN

Request Details ▾ | Print/Share ▾ | Attachments ▾

EXPECTED EXPENSES

Add | Edit | Delete | Allocate

☐ Expense type ↑↓

Add Expected Expense

Search for an expense type

- Declining Balance Card Request
- Delegate 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

Creating New Request cont.

New Expense: Non-Cardholder Access Request

1. **Request Date:** Enter the date that one is submitting the Request.
2. **User's Role:** Toggle the box for the role the individual will play within CardQuest (expense approver, expense user, or travel booking user).
3. **Cardholder Information:** Enter the user's name, phone, Caltech ID number, mail code, email, PTA, and department code.
4. **Approver Information:** Enter the approver's full name and email.

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

6. Click on the "Save" button.

The screenshot shows a web form titled "New Expense: Non-Cardholder Access Request" with a "Cancel" and "Save" button in the top right. The form contains several fields and checkboxes, with orange arrows pointing to specific elements:

- Request Date ***: A date picker showing "07/06/2022".
- Expense Approver ***: A checkbox labeled "Expense Approver: Approves expense report and all charges".
- Expense User ***: A checked checkbox labeled "Expense User: Creates reports, allocate charges, submits reports".
- Travel Booking ***: A checkbox labeled "Travel Booking: Only uses travel portal for booking trips".
- User Name ***: A text field containing "Brian Herrera".
- User Phone Number ***: A text field containing "(123) 456-7890".
- Employee ID Number ***: A text field containing "1234567".
- Mail Code ***: A text field containing "MC 103-6".
- Project/Task/Award ***: A dropdown menu showing "FIN.00006/1.2/GB.000007 (P197772)".
- Email Address ***: A text field containing "BHerrera@caltech.edu".
- Default Department Code ***: A dropdown menu showing "(8Q) DIV- FINANCE; DEPT- PURCHASING".
- Approver Name ***: A text field containing "Michelle Lampe".
- Approver Email Address ***: A text field containing "MLampe@caltech.edu".
- Comment**: A text area containing "New Employee needs CardQuest access to reconcile on behalf of academic faculty".
- Save and Cancel buttons**: Located at the bottom left of the form.

Completing the Low Limit Card 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.

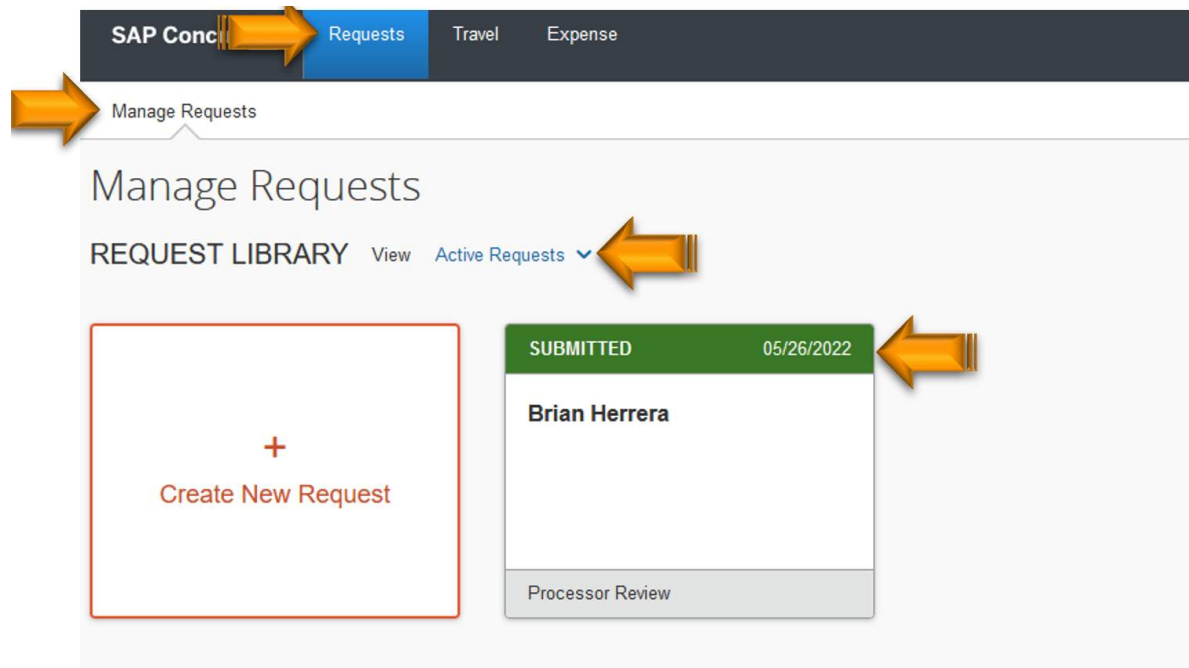
The screenshot shows a web application interface for processing requests. At the top, a black navigation bar is visible. Below it, the page title "Process Requests" is displayed. The main content area includes a balance indicator "Balance \$0.00" with a trash icon, a request ID "Request ID: 37RN", and a "Print/Share" dropdown menu. A section titled "EXPENSES" contains three buttons: "Edit", "Delete", and "Allocate". Below this is a table with a "Details" column and a "Request" column. An orange arrow points from the "Submit Request" button to 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 two buttons at the bottom: "Cancel" and "Accept & Continue". Another orange arrow points from the "Accept & Continue" button back to the "Submit Request" button.

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 with an amount of \$0.00. The modal is titled 'Request Timeline' and 'Brian Herrera | \$0.00'. It contains 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 'Processor Review'. The 'Request Summary' section contains a table of request history with columns for 'REQUEST COMMENT', 'SUBMITTED', and 'PROCESSOR REVIEW'. The table shows three entries: a request comment from Herrera, Brian on 05/26/2022, and two subsequent 'SUBMITTED' and 'PROCESSOR REVIEW' entries on 05/27/2022. A 'Close' button is located at the bottom right of the modal. Orange arrows highlight the 'Request Timeline' link in the left sidebar, the 'Request Timeline' modal, and the 'Close' button.

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

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