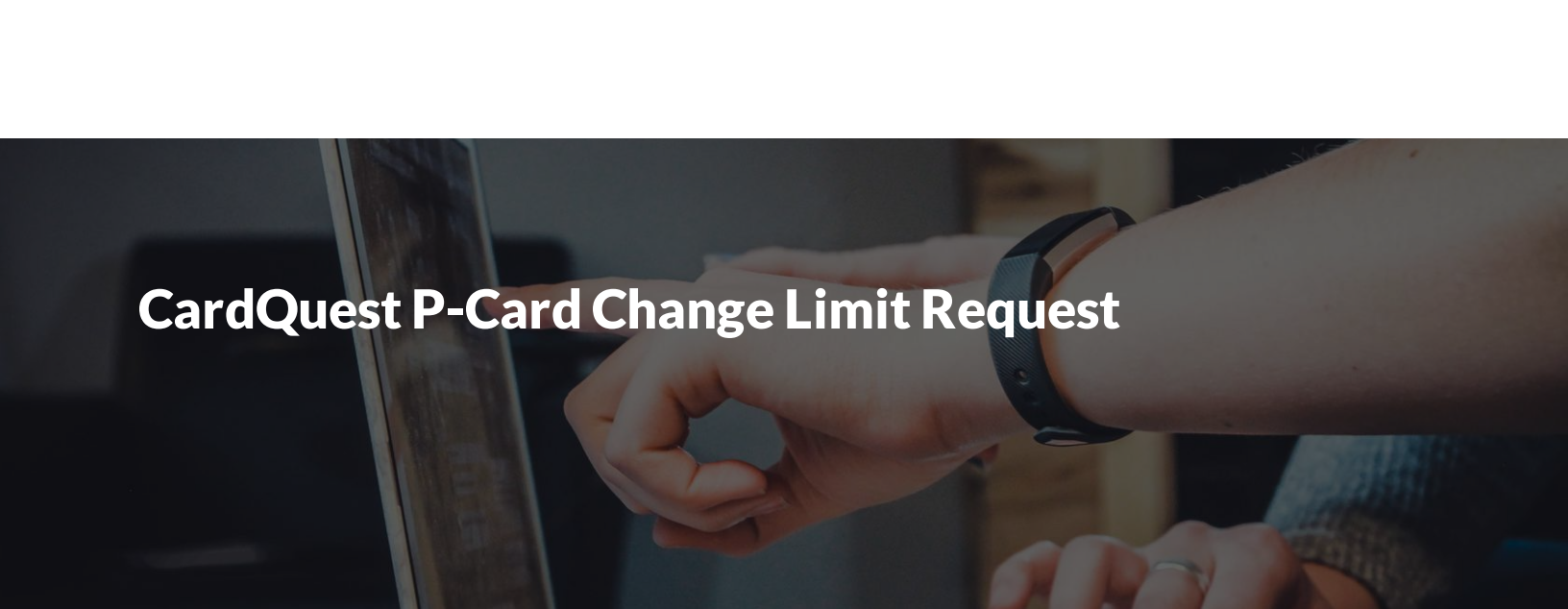




CardQuest P-Card Change Limit Request



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 P-Card Change Limit 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 P-CARD CHANGE LIMIT REQUEST

How to Submit a P-Card Change Limit Request

Must Know's Before Submitting P-Card Change Limit 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 assigned authorized expense approver.
 - 5 The Request will require further review for approval by Procurement Management Team.
-

Submitting P-Card Change Limit 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 P-Card Change Limit 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 yellow arrow points to the 'Requests' tab. Below the navigation bar, there's a 'CardQuest' logo and a summary of request statistics: '+ New', '00 Required Approvals', '00 Authorization Requests', '02 Available Expenses', and '00 Open Reports'. A 'COMPANY NOTES' section contains a reconciliation deadline for June 16, 2022. The bottom screenshot is the SAP Concur 'Manage Requests' page. It has a similar navigation bar. A yellow arrow points to the 'Manage Requests' link. Below the navigation bar, there's a 'Manage Requests' title and a 'REQUEST LIBRARY' section with a 'View' dropdown set to 'Active Requests'. A large box contains a '+ Create New Request' button, which is highlighted by a yellow arrow. To the right of this box, text states 'THERE ARE NO ACTIVE REQUESTS' and '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 "P-Card Change Limit 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. The form contains several fields and a submit button. Orange arrows are overlaid on the form to highlight specific elements:

- An arrow points to the "Request Policy" dropdown menu, which is currently set to "*P-Card Request Policy".
- An arrow points to the "Request Type" dropdown menu, which is currently set to "P-Card Change Limit Request".
- An arrow points to the "Comment" text area, which contains the text: "Requesting a temporary increase on monthly limit as limit has been reached and there are 11 days before the next billing cycle."
- An arrow points to the "Create Request" button, which is a blue button with white text.

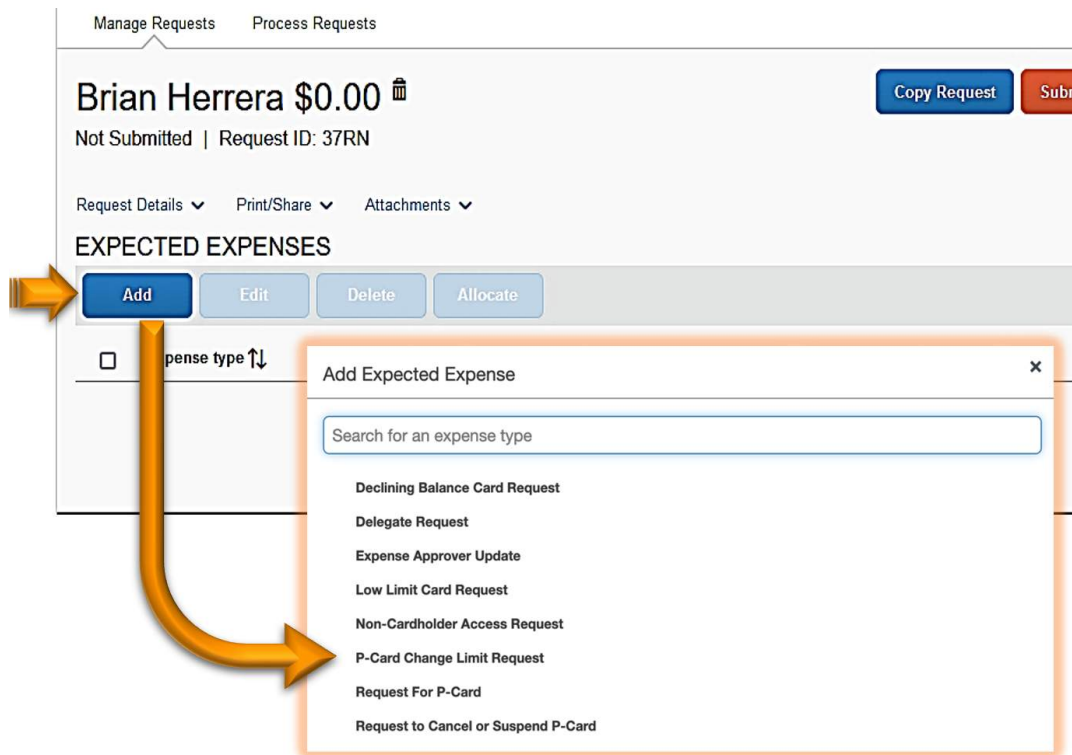
Other visible elements include:

- A "Cancel" button next to the "Create Request" button.
- A "Request Date" field with the value "07/06/2022" and a calendar icon.
- An "Enter Your Name" field with the value "Brian Herrera".
- A legend indicating that an asterisk (*) denotes a "Required field".

Creating New Request cont.

Expected Expenses

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



Creating New Request cont.

New Expense: P-Card Change Limit Request

1. **Request Date:** Enter the date that one is submitting the Request.
2. **Cardholder Name:** Enter the cardholder's name.
3. **Increase or Decrease Limit:** Specify whether the cardholder's limits will increase or decrease.
4. **Current Single Purchase and Monthly Limit:** Enter the cardholder's current limits. If limits are unknown, contact the P-Card Team to obtain information.

5. **Approver Information:** Enter the approver's full name and email.

6. **New Single Purchase and Monthly Limit:** Select the fixed limits available from the drop-down list (N/A if not applicable). If the desired limits are not in the list, select "other" from the drop-down and enter the needed amounts on the following field.

7. **New Cash Option Percentage:** Select the fixed percentage from the drop-down list (N/A if not applicable). If the desired percentage is not in the list, select "other" from the drop-down and enter the needed percentage on the following field.

8. **Permanent or Temporary Increase/Decrease:** From the drop-down list, specify if the increase will be permanent or temporary. If temporary, enter the end date (reverts to original limits).

9. **Justification:** Reasonably explain the need for an increase or decrease.

10. Click on the "Save" button.

The screenshot shows a web form titled "New Expense: P-Card Change Limit Request" with a "Cancel" and "Save" button at the top right. The form contains several input fields and dropdown menus, with orange arrows pointing to specific areas:

- Request Date ***: A date field showing "07/06/2022".
- Cardholder Name ***: A text field showing "Brian Herrera".
- Increase or Decrease Limit ***: A dropdown menu with "Increase Limit" selected.
- Current Single Purchase Limit ***: A text field showing "\$ 5,000.00".
- Current Monthly Limit ***: A text field showing "\$ 20,000.00".
- Approver Name ***: A text field showing "Monica Marquez".
- Approver Email Address ***: A text field showing "MMarquez@caltech.edu".
- New Single Purchase Limit ***: A dropdown menu with "a. N/A" selected.
- Other Single Purchase Limit**: A text field showing "\$".
- New Monthly Limit ***: A dropdown menu with "c. \$30,000" selected.
- Other Monthly Limit**: A text field showing "\$".
- New Cash Option Percentage ***: A dropdown menu with "a. N/A" selected.
- Other Cash Option Percentage**: A text field.
- Permanent or Temporary Increase/Decrease ***: A dropdown menu with "Temporary" selected.
- End Date**: A date field showing "07/16/2022".
- Justification ***: A text area containing the text "Requesting a temporary increase on the monthly limit as the limit has been reached and there are 11 days before the next billing cycle.".

At the bottom of the form, there are "Save" and "Cancel" buttons. An orange arrow points to the "Save" button.

Completing the Low Limit Card Request

Submit, Accept & Continue

1. **Attachments (optional):** Attach supporting documentation (invoices, vouchers, etc.) for the justification.
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.

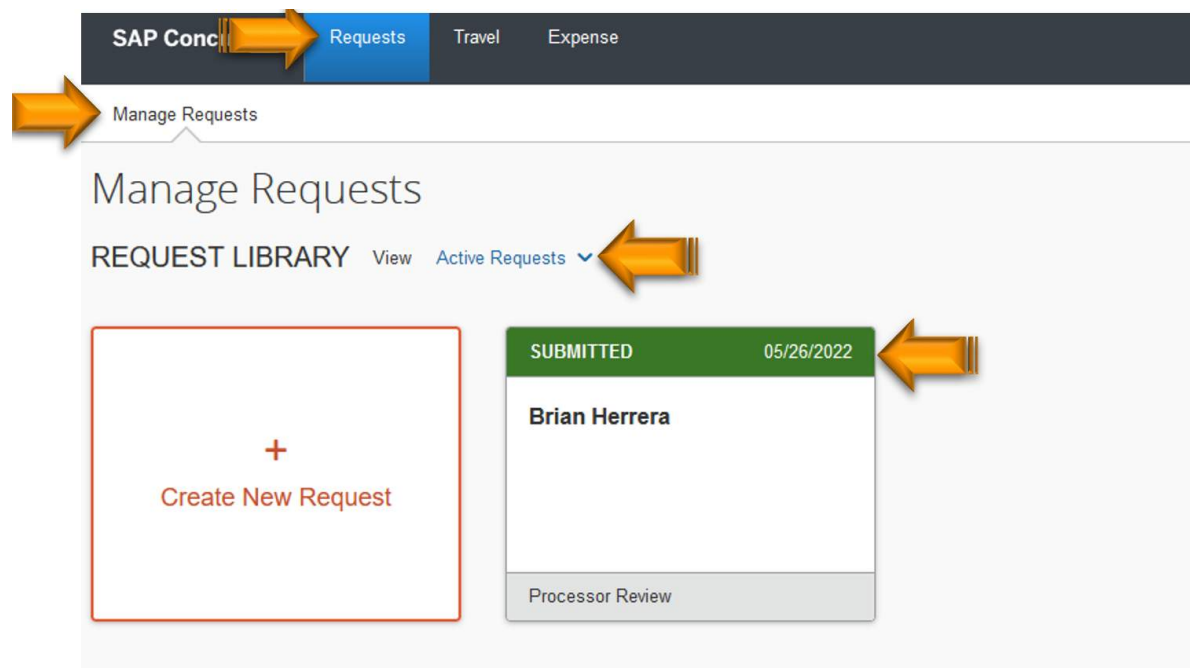
The screenshot illustrates the process flow for completing a Low Limit Card Request. It shows a web interface with a 'Process Requests' header. On the left, there's a section for 'era \$0.00' and 'Request ID: 37RN'. Below this, there's a 'Print/Share' dropdown and a 'PENSES' section with 'Edit', 'Delete', and 'Allocate' buttons. A 'Details' link is also visible. In the center, there's an 'Optional: Attach Supporting Documents' section with an 'Attachments' dropdown and an 'Attach Documents' button. On the right, there are 'Copy Request' and 'Submit Request' buttons. A large orange arrow points from the 'Submit Request' button to a modal window titled 'P-Card Request Electronic Agreement'. This modal window contains a statement: 'I understand that providing insufficient or inaccurate information may result in request processing delays.' At the bottom of the modal, there are 'Cancel' and 'Accept & Continue' buttons. Another large orange arrow points from the 'Accept & Continue' button back to the main interface.

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 displays the 'Request Workflow' interface for a request by Brian Herrera for \$0.00, with Request ID: 37RN. The interface includes a top navigation bar with 'Manage Requests' and 'Process Requests' tabs. Below the header, there are buttons for 'More Actions' and 'Recall'. A sidebar on the left contains a menu with 'Request Details', 'Print/Share', and 'Attachments'. The main content area is divided into two sections: 'Request Timeline' and 'Request Summary'. The 'Request Timeline' section shows an 'Approval Flow' with three steps: 'Processor Review' (marked with a green checkmark), 'Ad Hoc Approver', and 'Processor Review'. The 'Request Summary' section contains a 'REQUEST COMMENT' and three entries for 'SUBMITTED' and 'PROCESSOR REVIEW', all dated 05/27/2022. A 'Close' button is located at the bottom right of the 'Request Summary' section.

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.