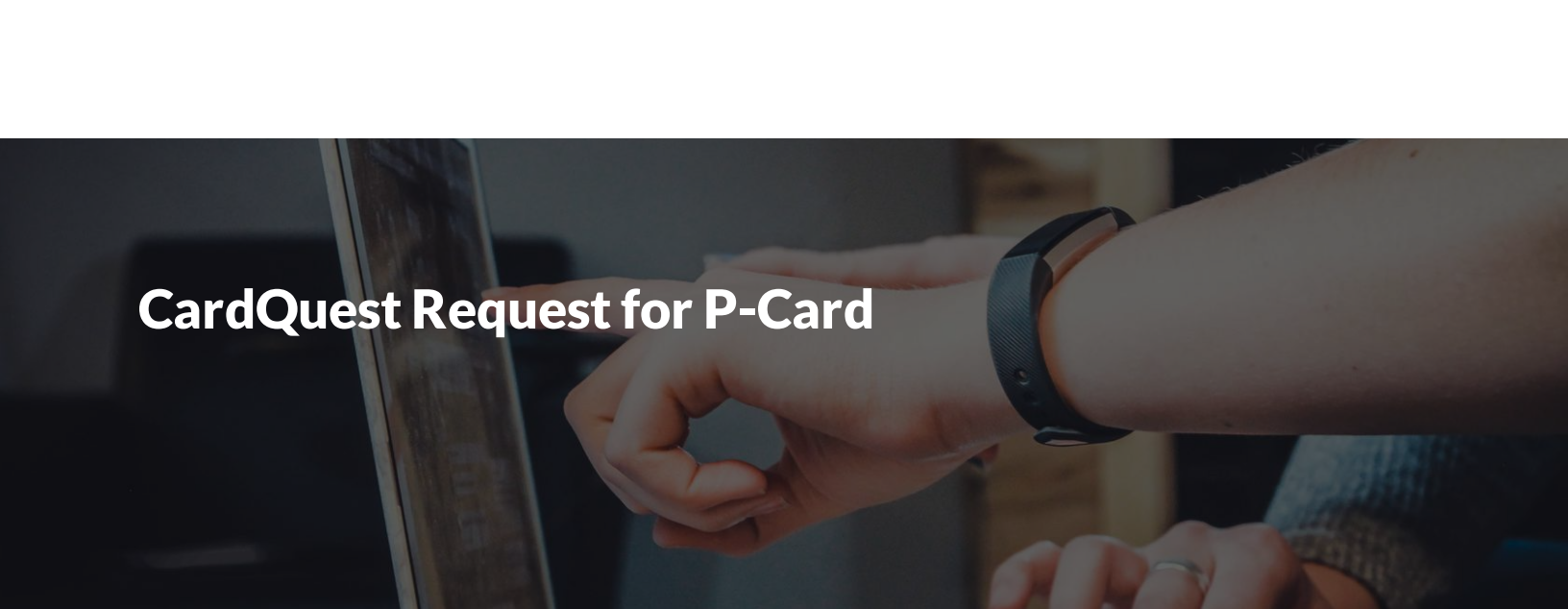


A close-up photograph of a person's hand pointing at a tablet screen. The hand is wearing a black wristband. The background is blurred, showing what appears to be a computer monitor and some office equipment.

CardQuest Request for P-Card



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 Request for P-Card. 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 REQUEST FOR P-CARD

How to Submit a Request for P-Card

Must Know's Before Submitting Request for P-Card

- 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 P-Card is issued to a Caltech Employee or Student. The Request will require approval by the assigned authorized expense approver.
- 5 Goods and Services P-Card is for small-dollar purchase of goods/services necessary to conduct Institute business and are set to a \$3,500.00 single purchase limit and \$15,000.00 monthly limit.
- 6 Goods and Services with Travel P-Card are Cardholders that travel for the procurement of goods/services and travel expenses and are set to a \$5,000.00 single purchase limit and \$20,000.00 monthly limit.
- 7 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 Request for P-Card

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



Login

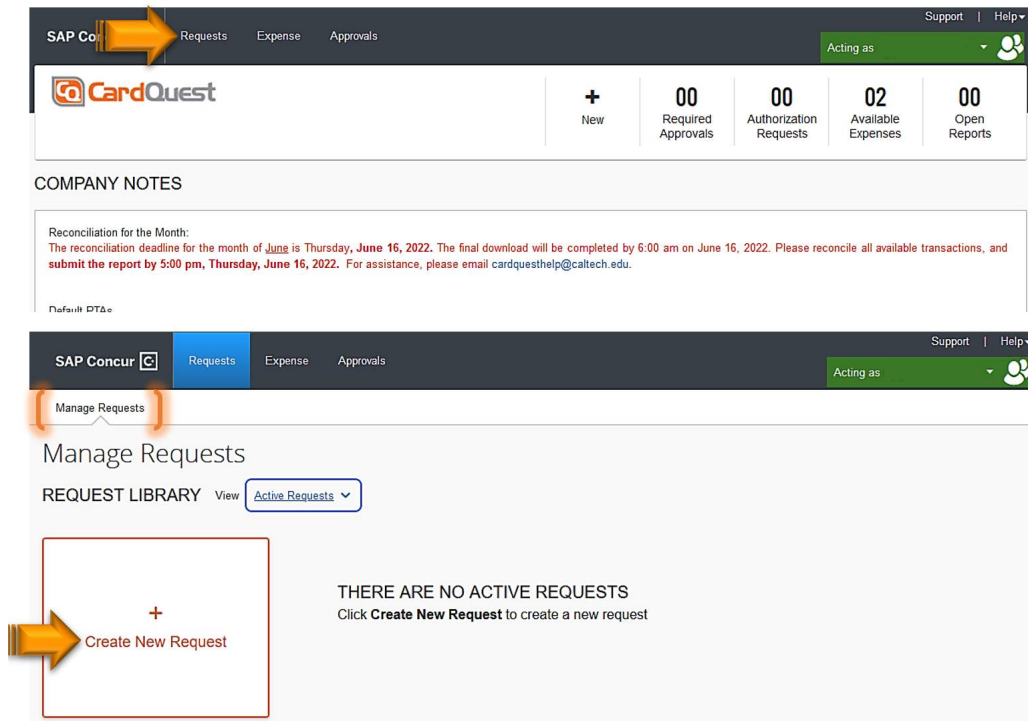


ATTENTION: If you are using a shared or publicly-accessible computer, be sure to quit/close out of the browser program completely to ensure your session is terminated.

Navigating the Landing Page

Request Module

Click on the "Requests." Under "Manage Requests," click directly on the "Create New Request" button to initiate the Request for P-Card.



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 "Request for P-Card."
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 a red asterisk (*) denotes a required field. The form contains the following fields:

- Request Policy ***: A dropdown menu with "P-Card Request Policy" selected. A yellow arrow points to this field.
- Enter Your Name ***: A text input field containing "Brian Herrera". A yellow arrow points to this field.
- Request Type ***: A dropdown menu with "Request for P-Card" selected. A yellow arrow points to this field.
- Request Date ***: A date input field containing "07/06/2022" with a calendar icon. A yellow arrow points to this field.
- Comment**: A large text area containing the text "Onboarding new employees and employees will need a P-Card to conduct Institute business." A yellow arrow points to this field.

At the bottom right of the form, there are two buttons: "Cancel" and "Create Request". A large yellow arrow points down to 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 "Request for P-Card."

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: Request for P-Card

1. **Request Date:** Enter the date that one is submitting the Request.
2. **Employee Type:** Select the applicant's role within the institute from the drop-down list.
3. **Card Option:** Toggle the box for the type of P-Card applicant will receive(Goods and Services or Travel)
4. **Cash Option:** Toggle the box if the applicant will need cash withdrawal ability for travel use. The cash withdrawal limit is set to ten percent of the monthly limit.
5. **Cardholder Information:** Enter the user's name, phone, Caltech ID number, mail code, email, PTA, and department code.
6. **Approver Information:** Enter the approver's full name and email.

Manage Requests Process Requests

New Expense: Request For P-Card

07/06/2022

Request Date *
07/06/2022

Employee Type *
Faculty

Cardholder Role *
Cardholder

Approved Amount
IGNORE THIS FIELD

☐ Goods and Services: Purchase Limit of 3.5K Single & 15K Monthly

☒ Travel: Travel Purchase Limit of 5K Single & 20K Monthly

☒ Cash Availability (Travel Use Only)

Cardholder Name *
Lupe Gudino

Cardholder Phone Number *
(123) 456-7890

Employee ID Number *
123456

Project/Task/Award *
FIN.00006/1.2/GB.000007 (P197772)

Mail Code *
MC 103-6

Default Department Code *
(8Q) DIV- FINANCE; DEPT- PURCHASING

Email Address *
LGudino@caltech.edu

Approver Name *
Michelle Lampe

Approver Email Address *
MLampe@caltech.edu

Cancel Save

Creating New Request cont.

New Expense: Request for P-Card cont.

7. Delegate Information: If the applicant has a delegate, toggle the box. Enter the delegate's full name and email. Leave as is if a delegate will not be assigned.

8. Traveler Arranger Information: If the delegate is also the travel arranger, toggle the box (Same as a Delegate) and proceed. Toggle the box if no travel arranger will be assigned (Check if no Travel Arranger.) If the travel arranger will be a different individual, enter the travel arranger's information.

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

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

10. Click on the "Save" button.

The screenshot shows a web form for a P-Card Request. It includes several input fields and checkboxes. Orange arrows point to the following elements:

- ☐ Check if no Delegate
- Delegate Name: Brian
- Delegate Email Address: Herrera
- ☒ Same as Delegate
- ☐ Check if no Travel Arranger
- Travel Arranger Name
- Travel Arranger Email Address
- Travel Arranger Phone: (123) 456-7890
- Comment: Onboarding new employees and employees will need a P-Card to conduct Institute business.
- Save button

Completing the Request for P-Card

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 the Request has been submitted.

3. Click on the "Accept & Continue" button to acknowledge. Request has been submitted and is in Processor Review.

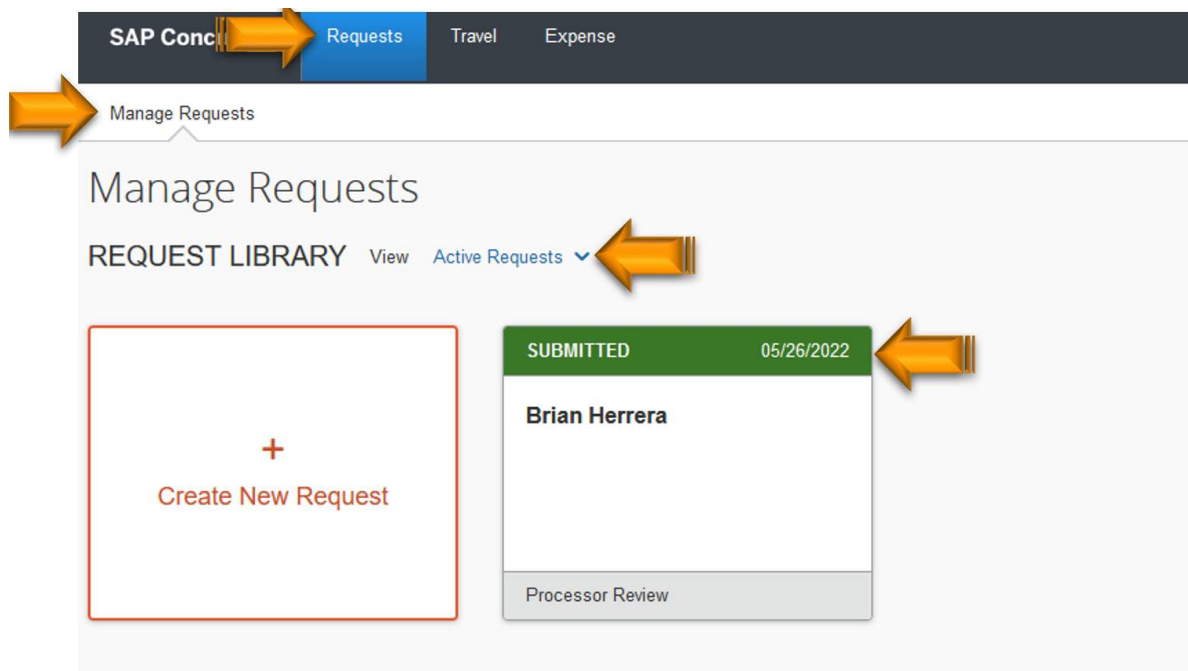
The screenshot shows a web interface for processing requests. At the top, there is a header bar with a "Profile" dropdown and a user icon. Below the header, the page title is "Process Requests". The main content area displays a request summary for "Request ID: 37RN" with a balance of "\$0.00". There are buttons for "Copy Request" and "Submit Request". A dropdown menu labeled "Attachments" is open, showing "Attach Documents". Below this, there are buttons for "Edit", "Delete", and "Allocate". A table with a "Details" column is partially visible. An orange arrow points from the "Attachments" dropdown to the "Submit Request" button. Another orange arrow points from the "Submit Request" button to a modal dialog titled "P-Card Request Electronic Agreement". The dialog contains a statement: "I understand that providing insufficient or inaccurate information may result in request processing delays." At the bottom of the dialog are "Cancel" and "Accept & Continue" buttons. A third 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 displays the 'Request Timeline' for a request by Brian Herrera with a value of \$0.00. The interface includes a sidebar with navigation options: Request, Request Header, Request Timeline (selected), and Audit Trail. The main content area is divided into two panels: 'Approval Flow' and 'Request Summary'.

Approval Flow: A vertical sequence of three steps is shown. The first step, 'Processor Review', is marked with a green checkmark inside a circle, indicating it is completed. The subsequent steps are 'Ad Hoc Approver' and 'Processor Review', both marked with empty circles.

Request Summary: This panel contains a list of events:

- 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.

At the bottom right of the 'Request Timeline' panel, there is a blue 'Close' button, which is highlighted by an orange arrow.

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