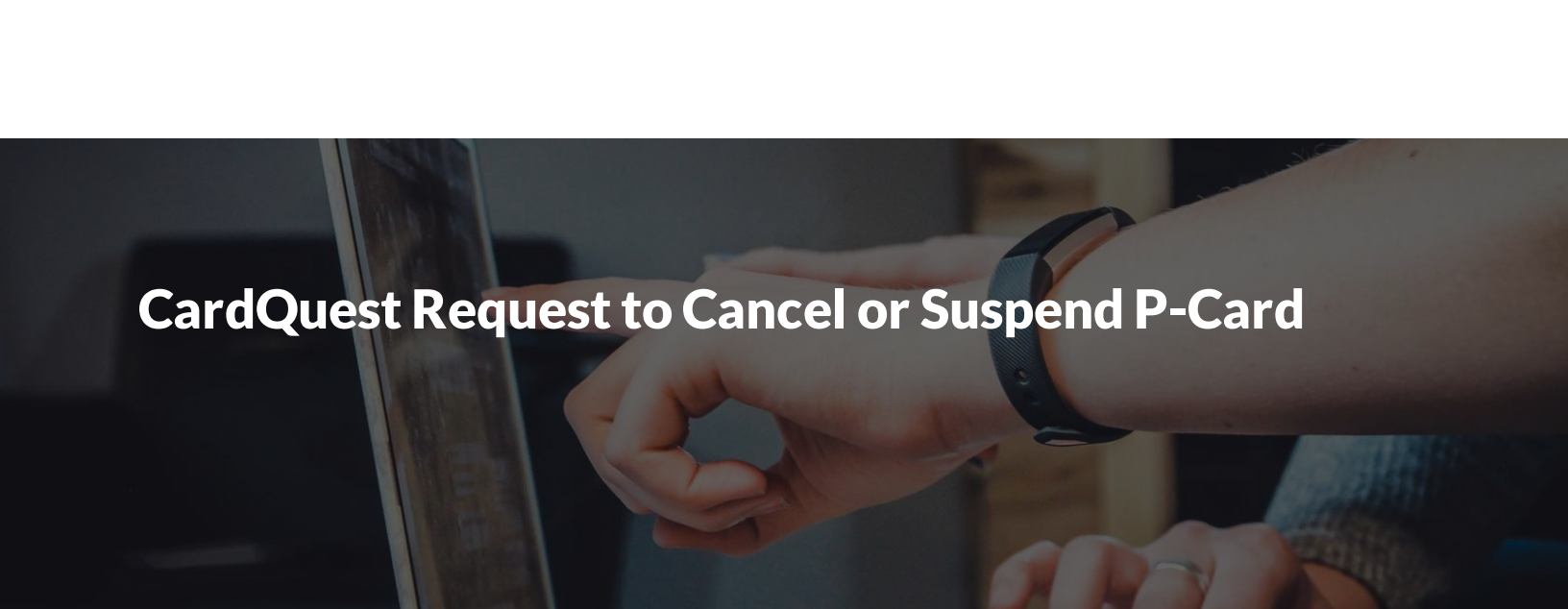




CardQuest Request to Cancel or Suspend P-Card



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 to Cancel or Suspend 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 TO CANCEL OR SUSPEND P-CARD

How to Submit a Request to Cancel or Suspend P-Card

Must Know's Before Submitting Request to Cancel or Suspend

- 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 All P-Cards should be immediately cancelled if a Cardholder terminates employment, transfers to another department, or assumes different duties that do not require use or management of the P-Card.
-

Submitting Request to Cancel or Suspend 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 to Cancel or Suspend P-Card.

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 (+), Required Approvals (00), Authorization Requests (00), Available Expenses (02), and Open Reports (00). 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 plus sign and the text 'Create New Request', with a yellow arrow pointing to it. To the right of this box, it says '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 "Request to Cancel or Suspend 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.

Create New Request ✕

Request Policy *

*P-Card Request Policy

Enter Your Name *

Brian Herrera

Request Type *

Request to Cancel or Suspend P-Card

Request Date *

07/07/2022

Comment

Jane Doe submitted their two-week notice.

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 "Request to Cancel or Suspend P-Card."

Manage Requests Process Requests

Brian Herrera \$0.00 

Not Submitted | Request ID: 37RN

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

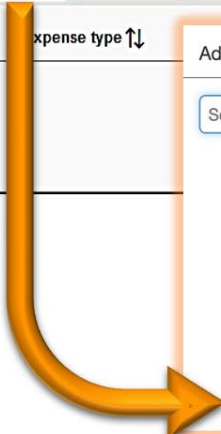
Add Edit Delete Allocate

☐	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 to Cancel or Suspend P-Card

- 1. Cancel or Suspend P-Card:** Specify if the P-Card will be canceled or suspended from the drop-down list.
- 2. Cancel or Suspension Start Date:** Enter the start date for when the P-Card will be canceled or suspended. If suspended P-Card, enter the end date in the following field (Suspension End Date).
- 3. Cardholder Information:** Enter the Cardholder's full name and Caltech ID number.
- 4. Justification:** Explain the requested action item.

5. Click on the "Save" button.

The screenshot shows a web form titled "Request to Cancel or Suspend P-Card \$0.00". At the top, there are tabs for "Manage Requests" and "Process Requests". The form has a header bar with a back arrow, a forward arrow, the title, a trash icon, and "Cancel" and "Save" buttons. Below the header, the date "07/07/2022" is displayed. The form contains several fields: a dropdown menu for "Cancel or Suspend P-Card?" with "Cancel" selected; a date field for "Cancel/Suspension Start Date" with "07/07/2022"; a date field for "Suspension End Date" with the placeholder "MM/DD/YYYY"; a text field for "Cardholder Name" with "Jane Doe"; a text field for "Employee ID Number" with "123456"; and a text area for "Justification" with the text "Jane Doe submitted a two-week notice." At the bottom of the form, there are "Save" and "Cancel" buttons. Yellow arrows point to the "Cancel" dropdown, the "Cancel/Suspension Start Date" field, the "Suspension End Date" field, the "Cardholder Name" field, the "Employee ID Number" field, the "Justification" text area, and the bottom "Save" button.

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 web application interface with a top navigation bar containing links for Requests, Travel, Expense, Approvals, Reporting, and App Center. A user profile icon is in the top right. Below the navigation bar, the main content area displays a request summary with a balance of \$0.00 and a request ID of 37RN. On the right side of this summary are two buttons: 'Copy Request' and 'Submit Request'. A large orange arrow points from the 'Submit Request' button to a modal dialog box titled 'P-Card Request Electronic Agreement'. The dialog box contains a text area with the 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. Another orange arrow points from the 'Accept & Continue' button back to the 'Submit Request' button, indicating a feedback loop.

Requests Travel Expense Approvals Reporting App Center Profile

Process Requests

Balance: \$0.00

Request ID: 37RN

Share Attachments

Details

Delete Allocate

P-Card Request Electronic Agreement

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

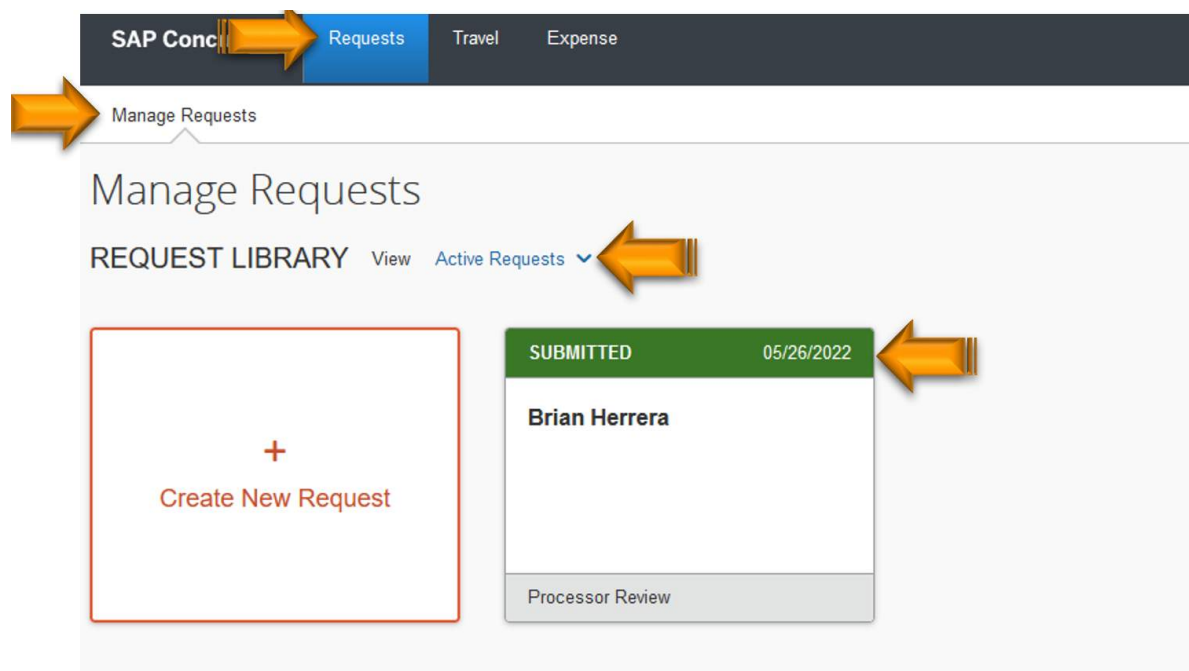
Cancel Accept & Continue

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.



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 titled 'Brian Herrera \$0.00' with Request ID 37RN. The interface includes a sidebar with navigation options: Request Details, Request Header, Request Timeline (selected), and Audit Trail. The main content area is divided into two sections: '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 another 'Processor Review', both marked with empty circles.

Request Summary: This section contains a chronological log of the request's history:

- 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' window, there is a blue 'Close' button.

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