# How to Submit a Request through SAP Concur

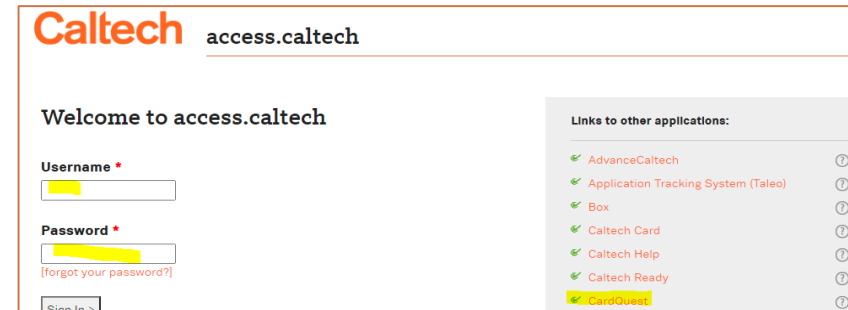**Non Cardholder Access Request**

**Caltech**

**1**

## Logging In
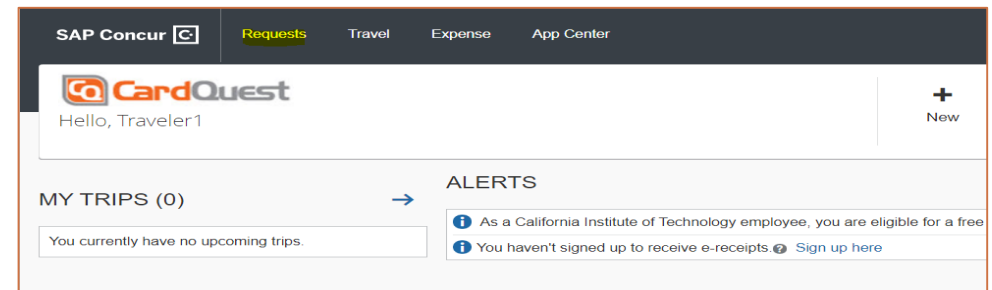
➢ Go to access.caltech
➢ Sign In with your Caltech Credentials


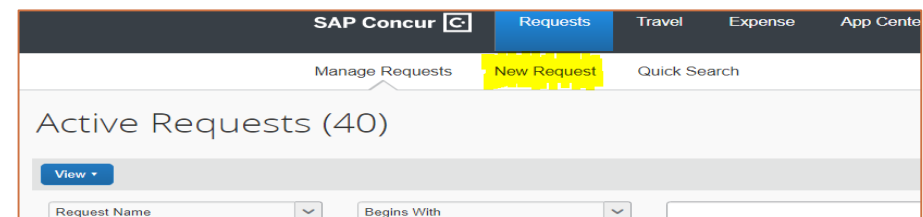
**2**

## On the Landing Page

➢ Click on *Requests* (upper left hand)



**3**

## On Active Requests

➢ Click on *New Request*

## 4 Request/Request Header Tab

- ➤ **Request Policy**: Select *P-Card Request Policy*
- ➤ **Enter Your Name**: Even if you are requesting on behalf of someone else, enter your name
- ➤ **Request Type**: Select *Non-Cardholder Access Request*
- ➤ **Comment**: Add comment to expedite or other note
- ➤ Click *Save*

## 5 After Saving from step 4

Expenses Tab.

- ➤ Select *Non-Cardholder Access*
- ➤ It will load and take you to step 6



Request

Cancel | Save | Print / Email ▾ | Delete Request | Submit Request

Status: Not Submitted

**Enter Your Name:**

Request Header | Expenses | Approval Flow | Audit Trail

| Request Policy | Enter Your Name | Request Type |
|---|---|---|
| *P-Card Request Policy | Lupe Gudino | Non-Cardholder Access Request |

Request Date
07/26/2021

Comment



Request 33CH

Attachments ▾ | Print / Email ▾ | Delete Request | Submit Request

Status: Not Submitted

**Enter Your Name:** Lupe Guino

Request Header | Expenses | Approval Flow | Audit Trail

+ New Expense | Delete | «

| Date | Expe... | Amount | Requested |
|---|---|---|---|

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

| | |
|---|---|
| Cancel or Suspend P-Card | P-Card Change Limit Request |
| Delegate Request | Request For P-Card |
| Expense Approver Update | |
| Low Limit Card Request | |
| Non-Cardholder Access Request | |

## 6 Finishing Request
*All RED fields are Required*

- ➤ **Expense Type:** Select *Non-Cardholder Access*
- ➤ **Select:** the options applicable above
- ➤ **Enter:** User Name, Number, ID, Mail Code, PTA, E-mail, Department Code, and approver info
- ➤ Click *Save* (bottom of screen)



## 7 Final Review "Pop Up Box"
Accept and Submit



To view submitted requests please go to your "Manage Requests" Tab

If you encounter any problems, have questions or concerns please contact pcardservices@Caltech.edu

We really appreciate your time and effort in helping us succeed in this new SAP Concur implementation.

~The P-Card Team

# THANK YOU!

Caltech