

How to Submit a Request through SAP Concur

Non Cardholder Access Request

# If you experience any issues please contact pcardservices@Caltech.edu



2

# Logging In

- ➢ Go to <u>access.caltech</u>
- Sign In with your Caltech Credentials

Caltech access.caltech		
Welcome to access caltech		
	LINKS to other applications:	0
	<ul> <li>Application Tracking System (Taleo)</li> </ul>	?
	📽 Box	?
Password *	Caltech Card	?
	📽 Caltech Help	?
[forgot your password?]	🔮 Caltech Ready	?
Sign In 3	CardQuest	?

## On the Landing Page

Click on Requests (upper left hand)



# On Active Requests

Click on New Request





#### 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



#### 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 Reques
				Status:	Not Submitte
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	Comment				
07/26/2021					

Request 33CH	Attachments • Print / Email • Delete Request Submit Request
Enter Your Name: Lupe Guino Request Header Expenses Approval Flow Audit Trail	Status: Not Submitted
+ 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       Vertice of the context



#### 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)

Request 33J9 Enter Your Name: Luce Guidino				Attachments	Print / Email      Delete Request     Status:
Dequest Header Evnenses Annroval Flow Audit Trail					
Product that     P	Amount Requested	Expense Type Non-Cardholder Access Request Request Date 08/16/2021	₹? ■ Expense Approver: Approves expense report and all charges	Z Expense User: Creates reports, allocate charges, submits reports	Travel Booking: Only uses travel portal for booking trips
		User Name Monica Marques Project/Task/Award SMTLIBR/I/GIFTLIBRARIES (P2468060)	User Phone Number 12345678910 Email Address monica@caltech.edu	Employee ID Number 1234567 Default Department Code (80) DIV- FINANCE; DEPT- PURCHASINC	Mail Code 103-5 Comment
		Approver Name Tina Lowenthal	Approver Email Address		

Final Review "Pop Up Box
Accept and Submit

Final Review	□ ×
User Electronic Agreement	to CardQuest
r understand that raisinging information of abuse of this privilege may result in the withdrawar of access	
Accept & Submit	Cancel

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

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

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

~The P-Card Team



# THANK YOU!

