UNIVERSITY OF
SOUTH CAROLINA

PeopleSoft Procurement Card Approver Training

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PeopleSoft Procurement Card

- Today's Agenda
  - What is PeopleSoft Procurement Card?
  - Procurement Card Approval Overview
  - Approving from email or worklist
  - Sending back an expense report
  - Using the approve transactions page

PeopleSoft Procurement Card

- What is PeopleSoft Procurement Card?
  - A new process for automatically interfacing all Procurement card transactions directly into PeopleSoft, allocating these transactions to the appropriate accounting, reconciling the transactions to receipts, and electronically approving the transactions in the PeopleSoft Expenses module.

Approval Overview

- The Expense Report represents the Card statement and includes the appropriate backup.

- Process Flexibility
  - Each expense report entered by the Liaison is routed to the Cardholder for approval.
  - If an expense report is entered by a cardholder, it is routed to the Liaison for approval.

Approval Overview

- Each expense report is then routed to the "department head" responsible for approving card statements

- We are configuring the "department head" to be the same approver currently assigned to the visa verification.

- The approver is responsible for approving the expense report and verifying it represents the statement, has attached receipts and backup, and is allocated to the correct accounting distribution.

Approving from an Email or Worklist

- Email and Worklist; an explanation
- Review the Cardholder Name
- Business Purpose and Description
- Attachments, Receipts and Statement
- Expense Details and Related Content
- My Wallet Details and Enhanced Data
- Approval, Send Back, and Hold

Approving from the "Approve Transactions"

- Available to Approvers and Liaisons only

- Navigation

- Displays all transactions pending your approval

- Review each transaction

- Approve from the approval page or the summary page

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