About PCard / ISSP Approvals:

Cardinal provides PCard and ISSP Approvers with an "at a glance" view of all transactions that have been verified and ready for approval. This view is known as a **Pagelet** and is found on the approver's **Home Page**. ISSP and PCard transactions may be viewed and approved from the pagelet or by navigation to the reconciliation pages.

Pagelet Set-Up — **Pages 1 – 2**

Approving PCard Transactions — **Pages 2 – 5**

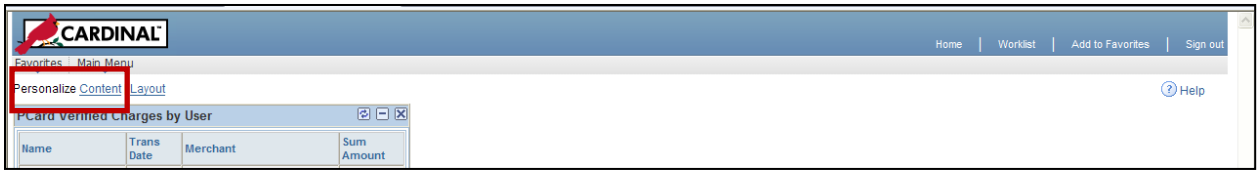
Approving ISSP Transactions — **Pages 5 – 10**

Pagelet Set-Up

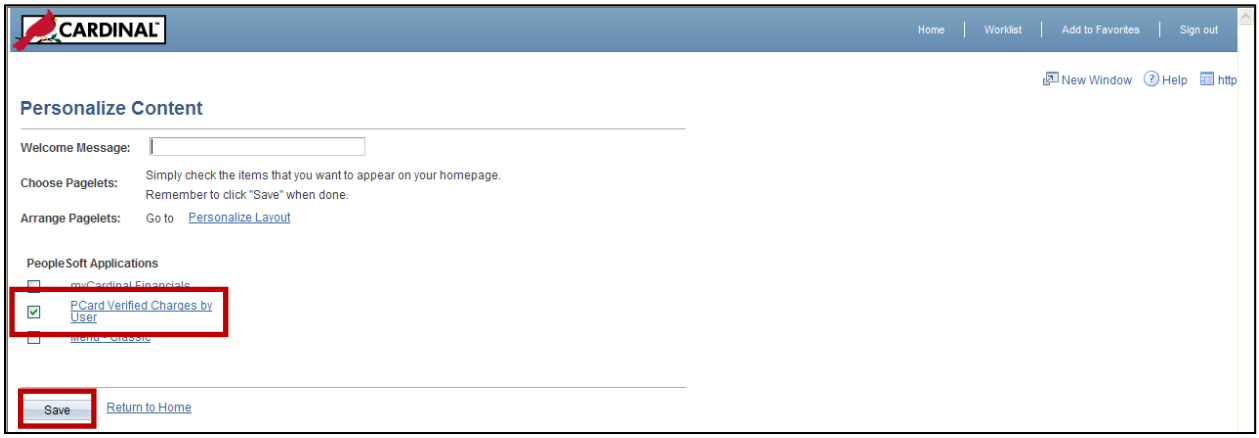
Note: Pagelet set-up is only required one time for PCard and ISSP Approvers.

1 Navigate: **Sign in to PeopleSoft**

2 Enter **User ID** and **Password**



3 Click on the **Personalize Content** hyperlink.

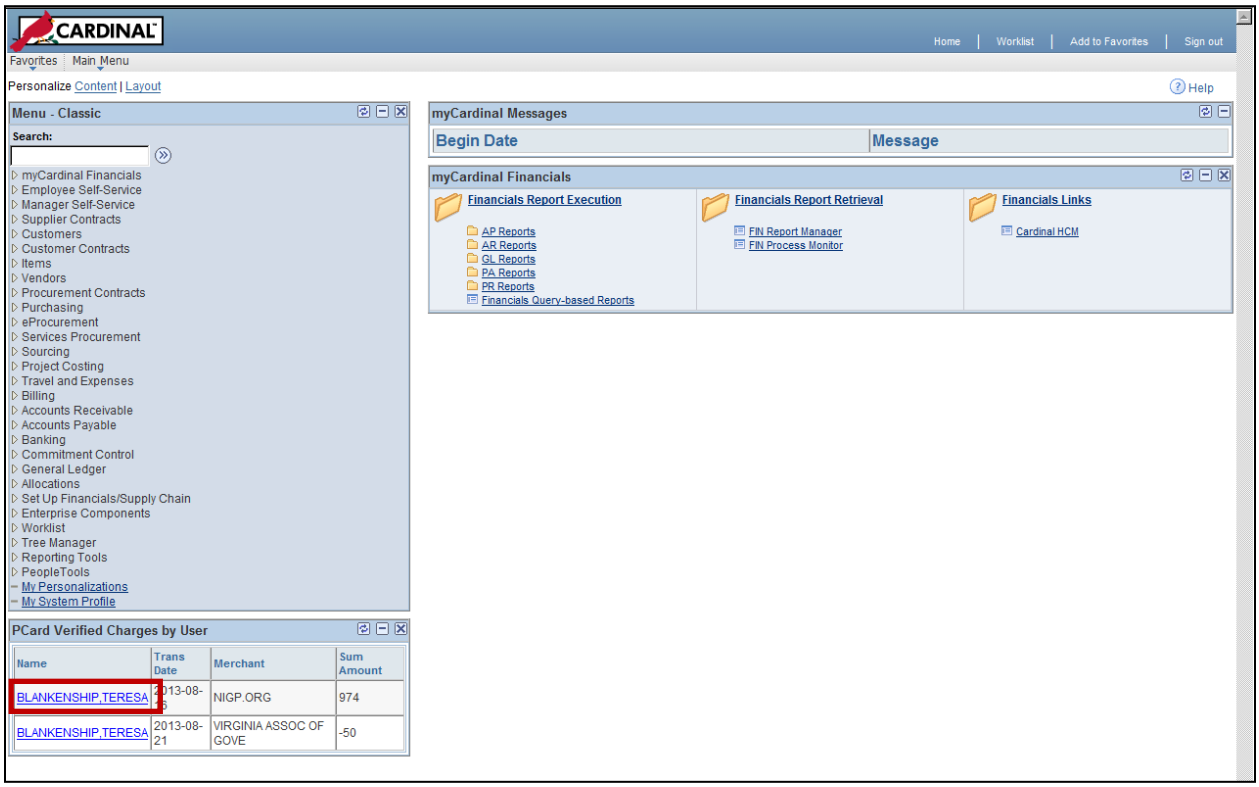


4 Click the checkbox next to **PCard Verified Charges by User**

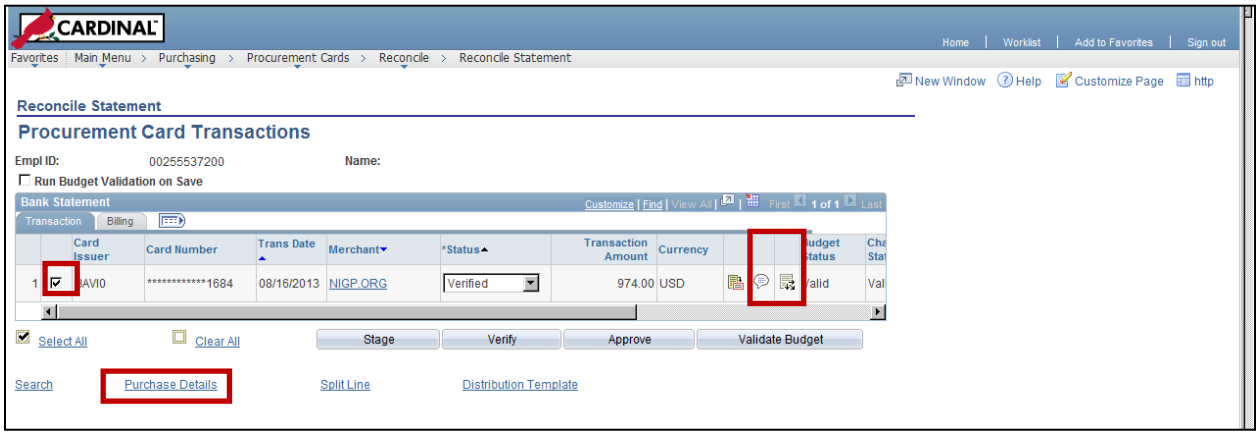
5 Click **Save**.

6 The Pagelet is now displayed on your homepage and shows only those transactions that are "verified" and ready for approval. **Note:** PCard transactions are by the PCard holder. ISSP transactions are by District.

Approving PCard Transactions

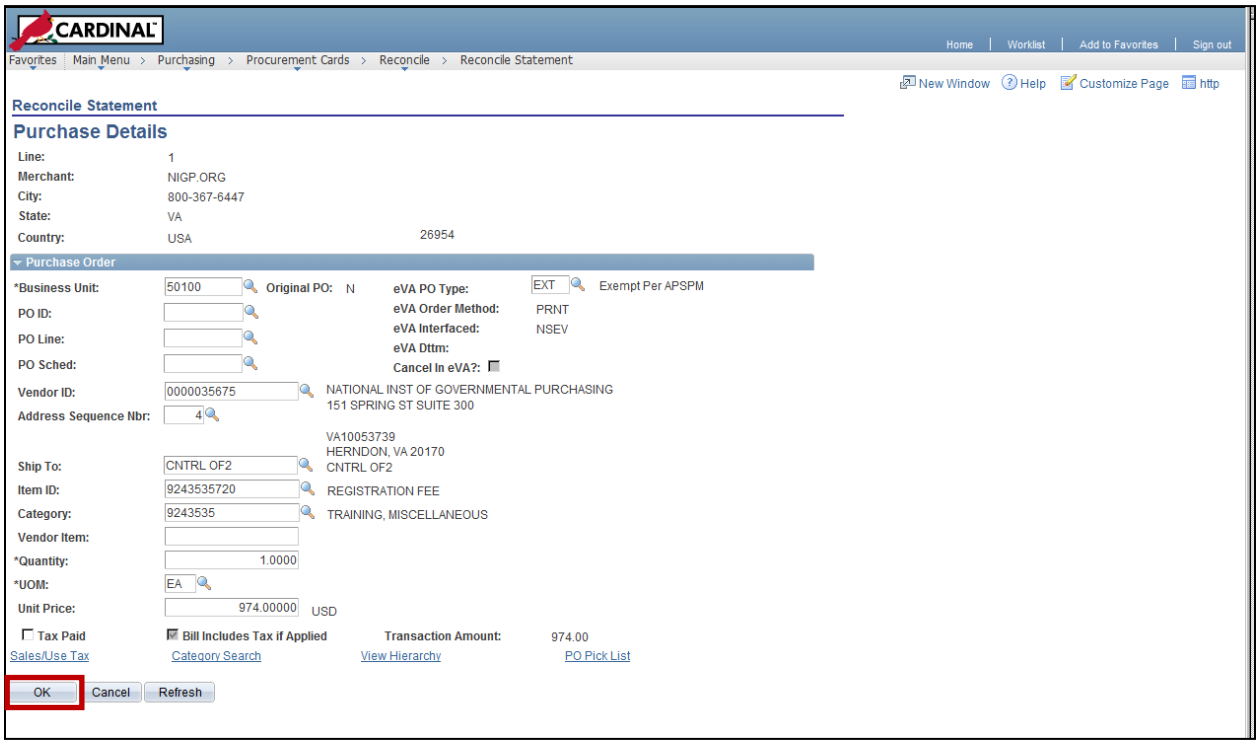


7 From the pagelet, click on the users **Name** hyperlink.

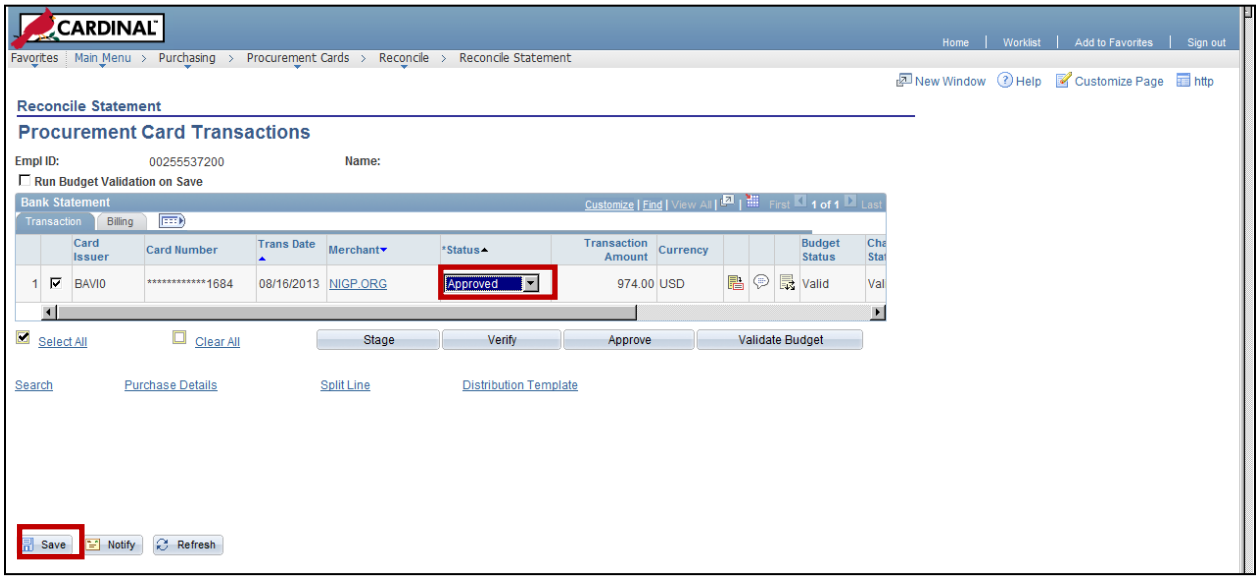


Note: you may view any line comment or distribution by clicking on the icons.

8 Select/check the transaction and click on the **Purchase Details** hyperlink.



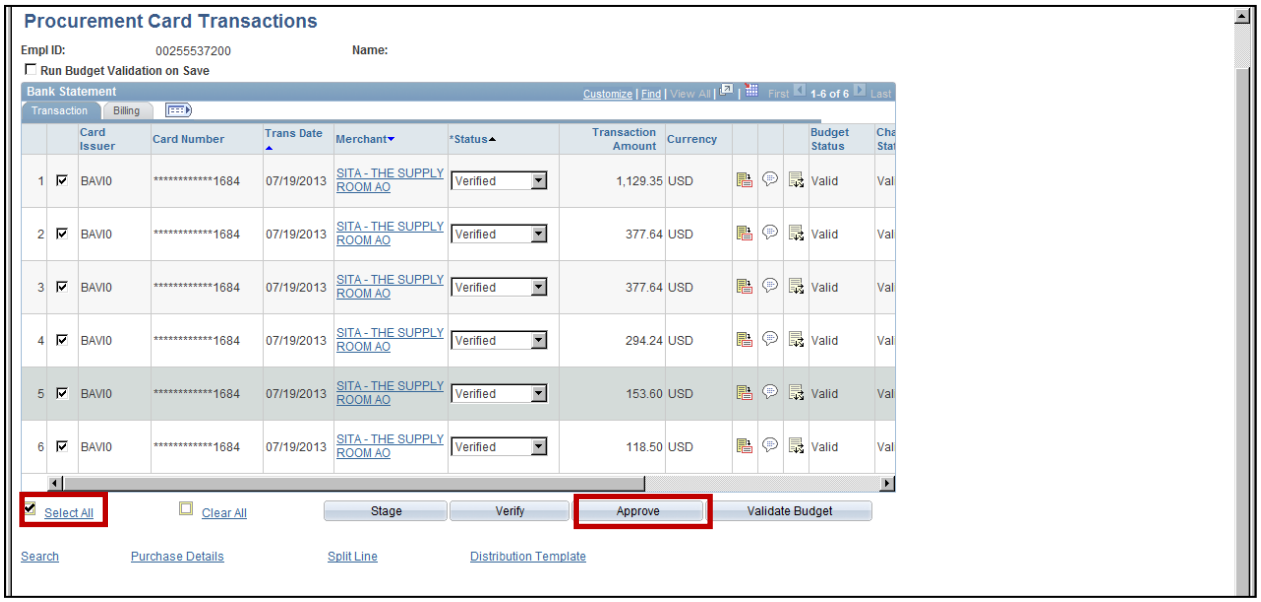
9 Click **OK**.



10 Change to **Approved** (from the dropdown menu)

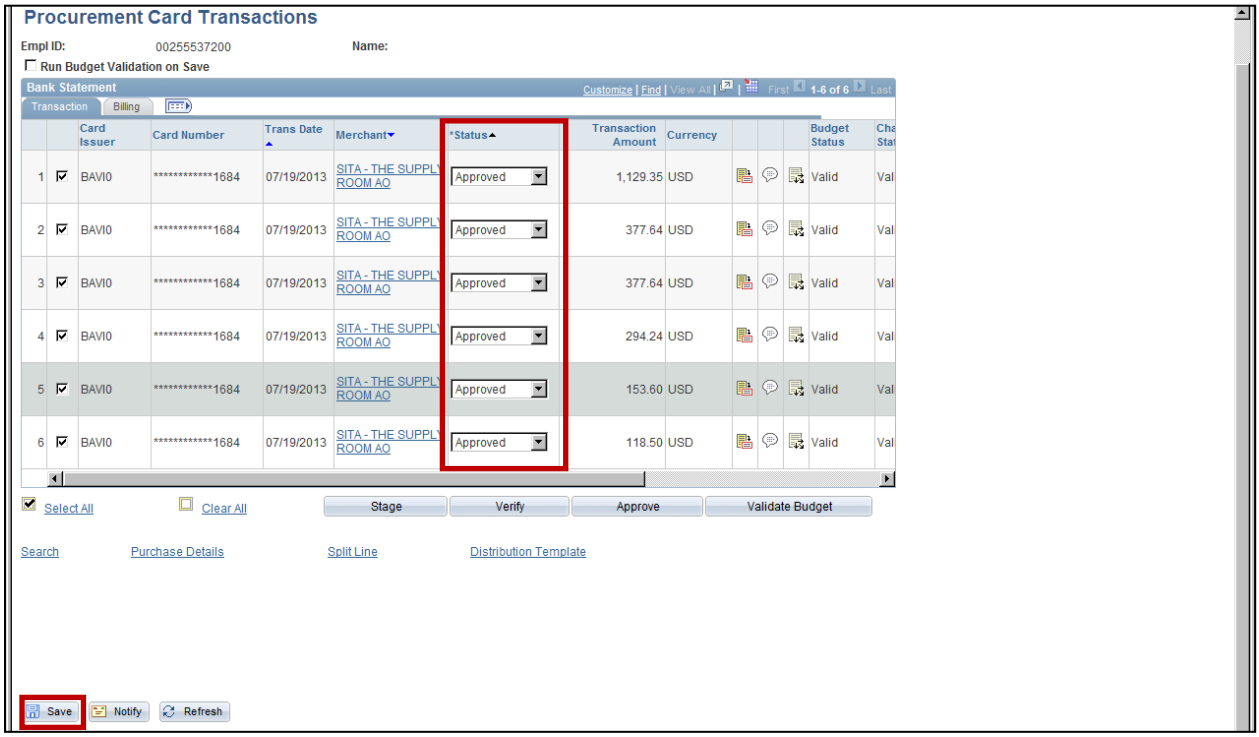
11 Click **Save**.

To approve all transactions from a list….



12 Click the **Select All** hyperlink.

13 Click the **Approve** button.



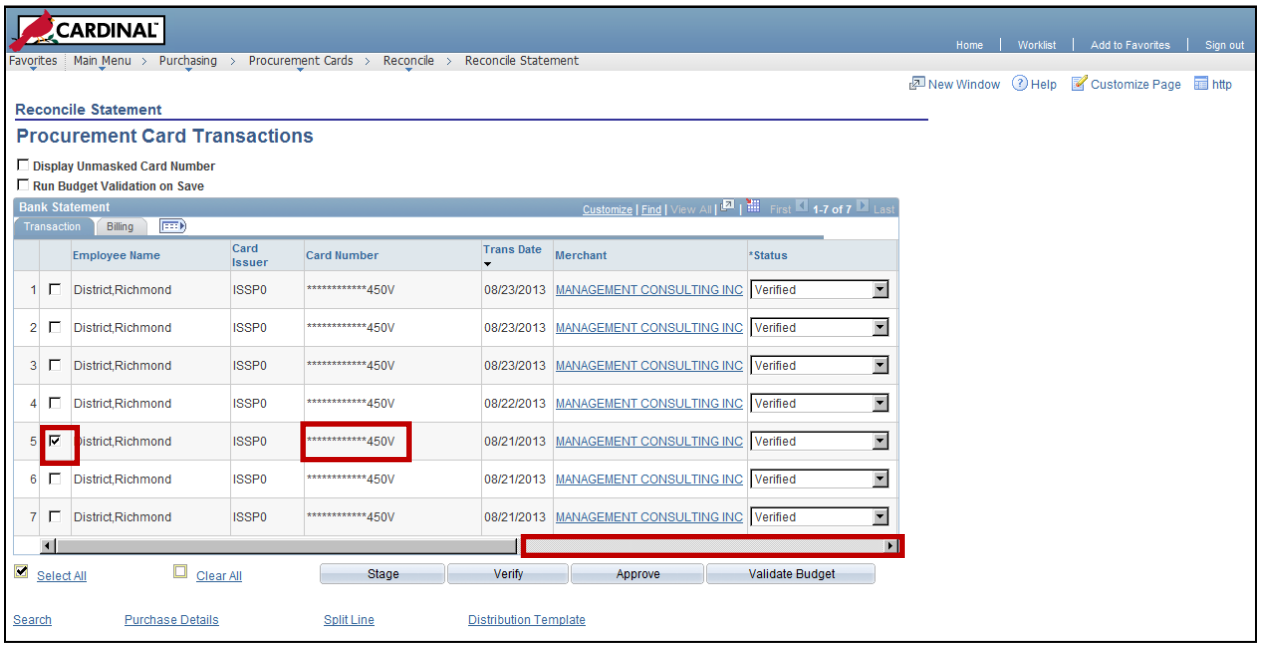
14 Transaction Status changes to **Approved** for all.

15 Click **Save**.

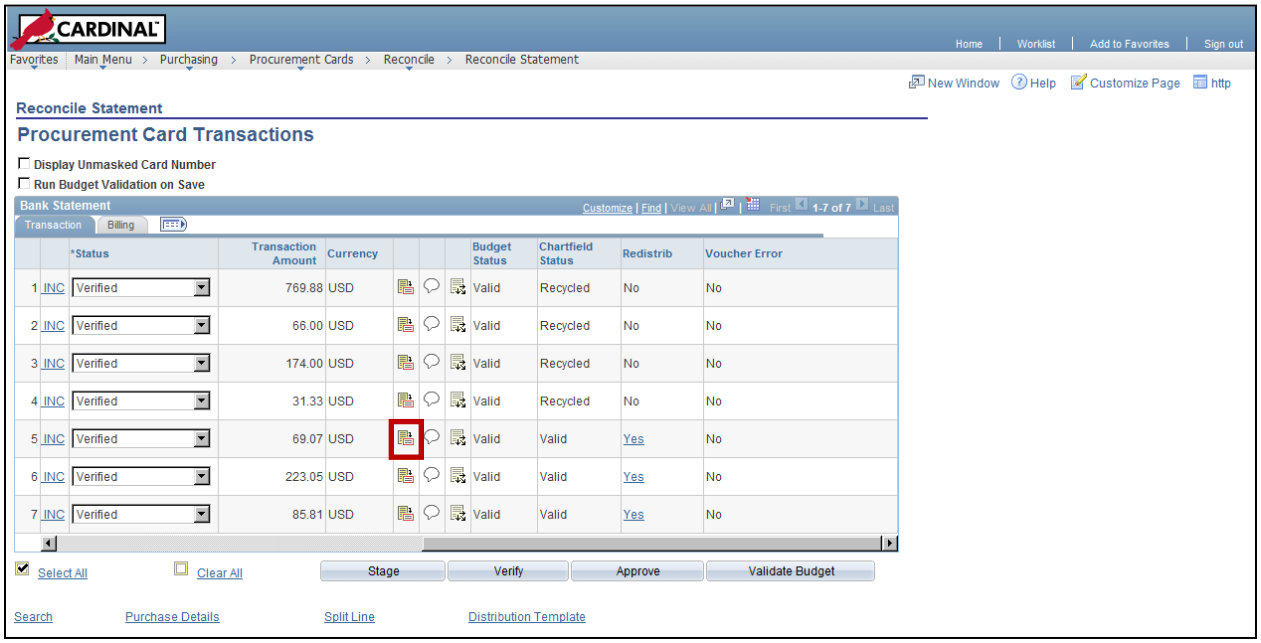
Approving ISSP Transactions

16 Click on a District ISSP transaction.

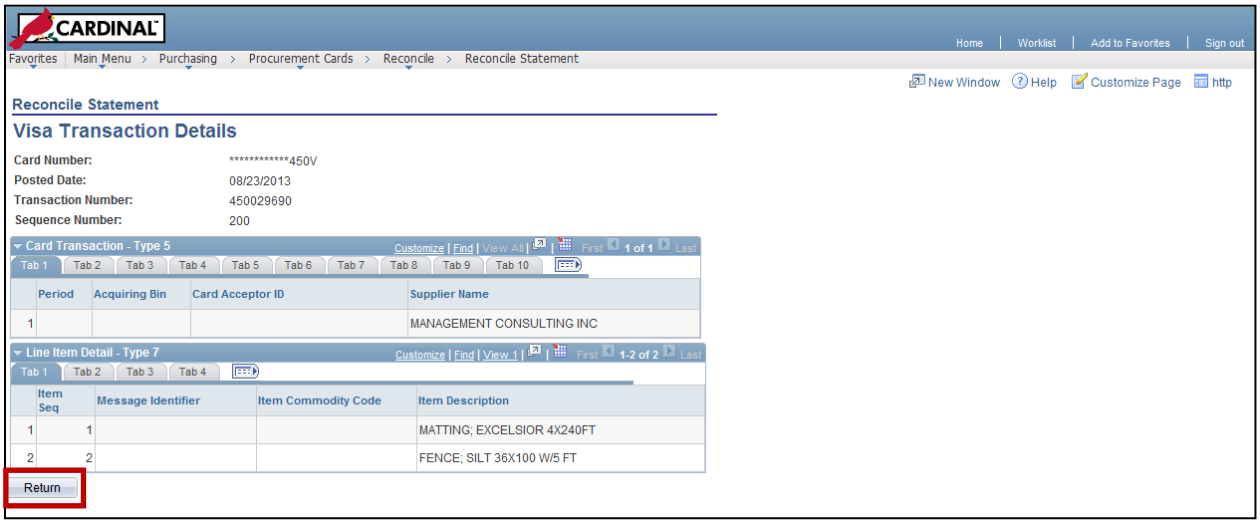
Note: Transactions displayed are **Verified** and ready for approval. ISSP transactions will have a Budget Status of "Valid" unless the Card Number ends in a "V". For these transactions you will need to click the Distribution icon to enter a valid chart of accounts.



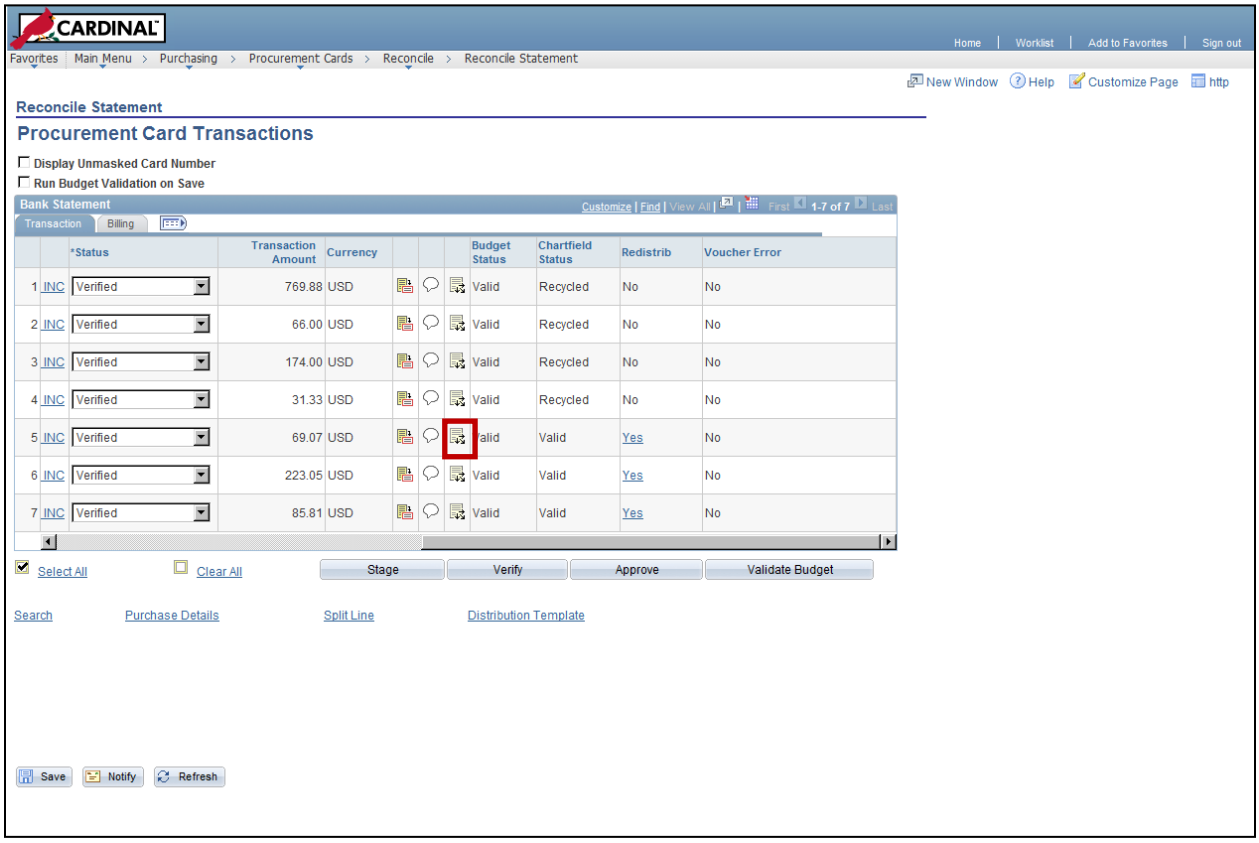
17 Check/Select the transaction item and slide the scrollbar to the right.



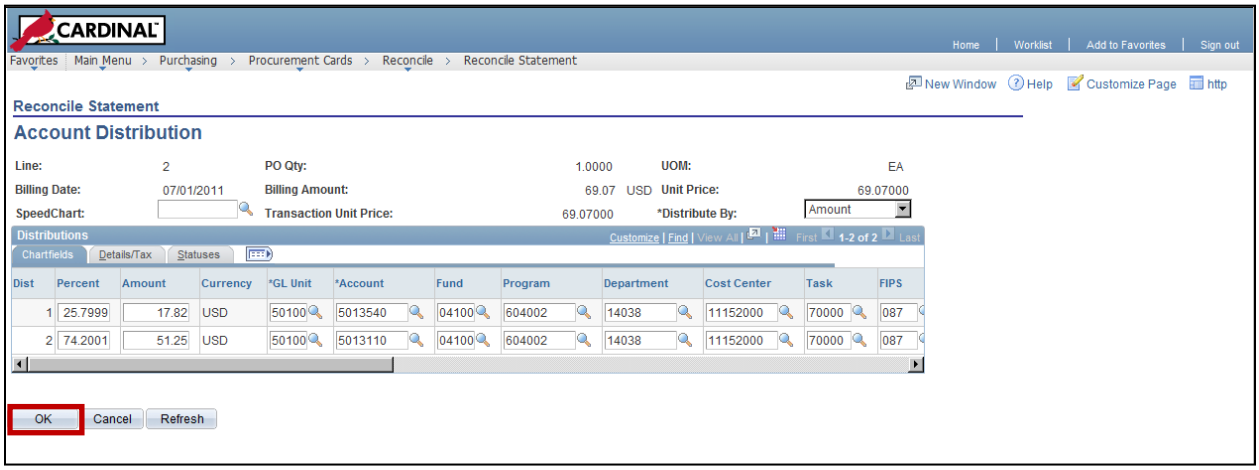
18 Click on the **Item Details** icon to view the item description.



19 Click **Return**.

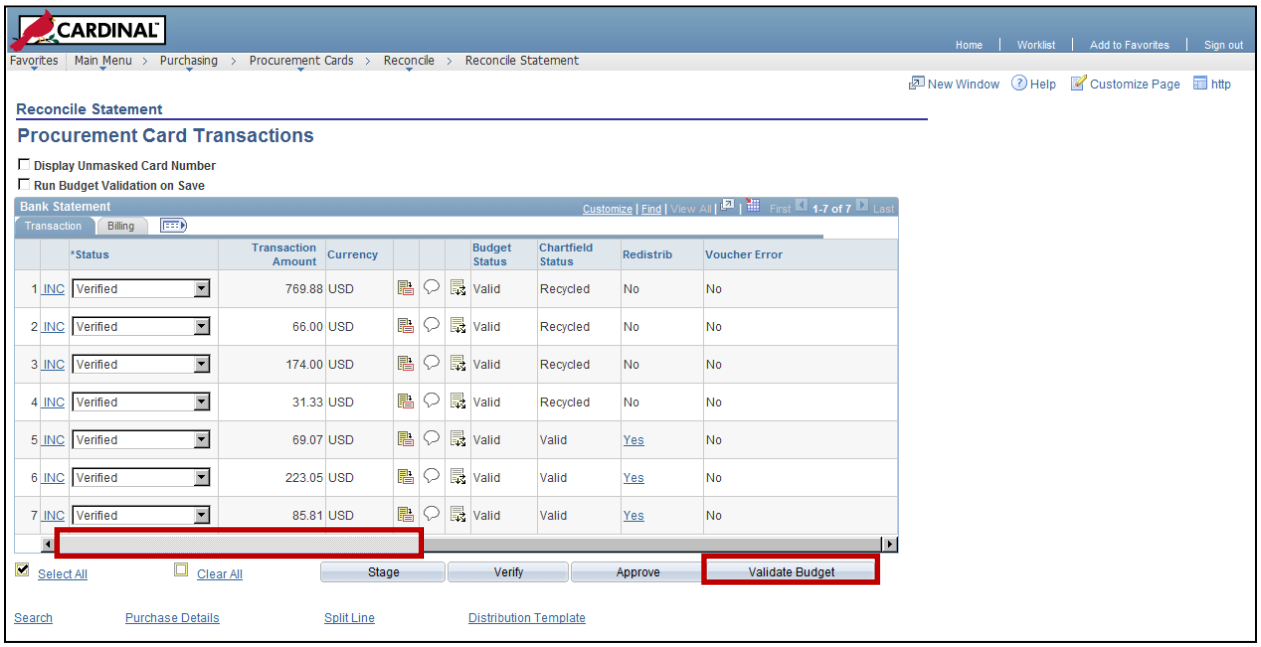


20 Click the **Distribution** icon.



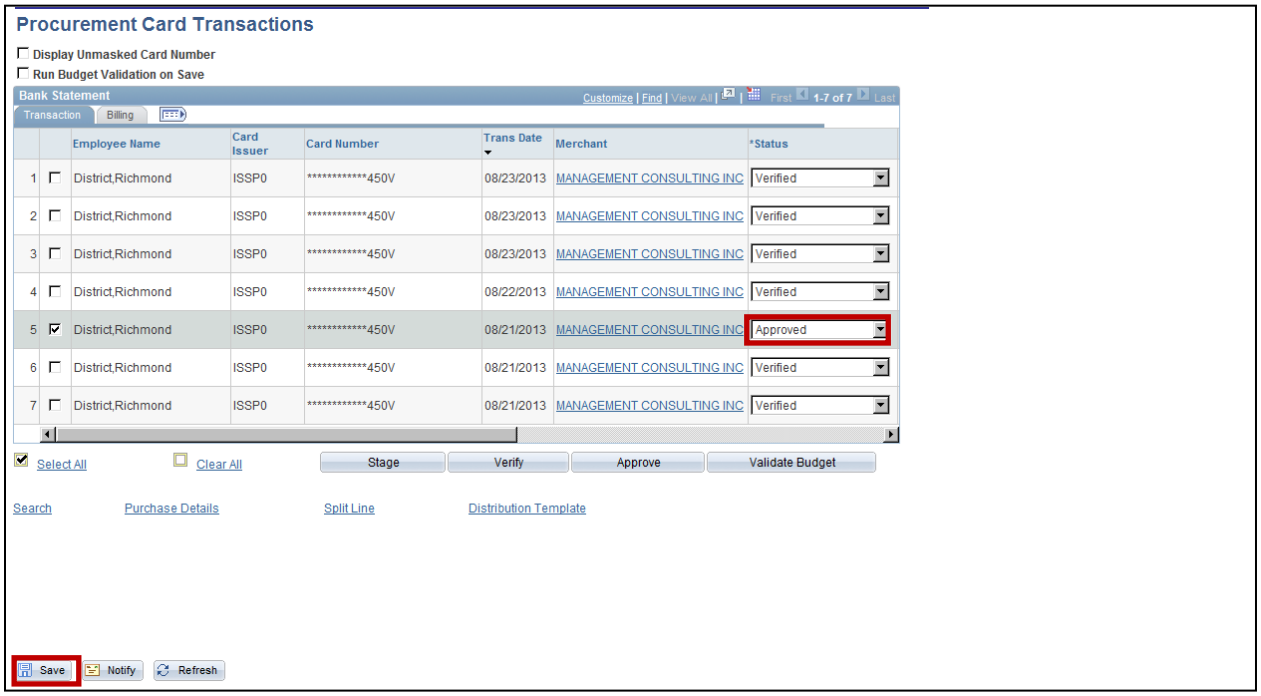
21 View/Edit the chart of accounts.

22 Click **OK**.



23 Click on **Validate Budget** button to set **Budget Status** to **Valid**, if changes were made.

24 Slide scrollbar back to the left.

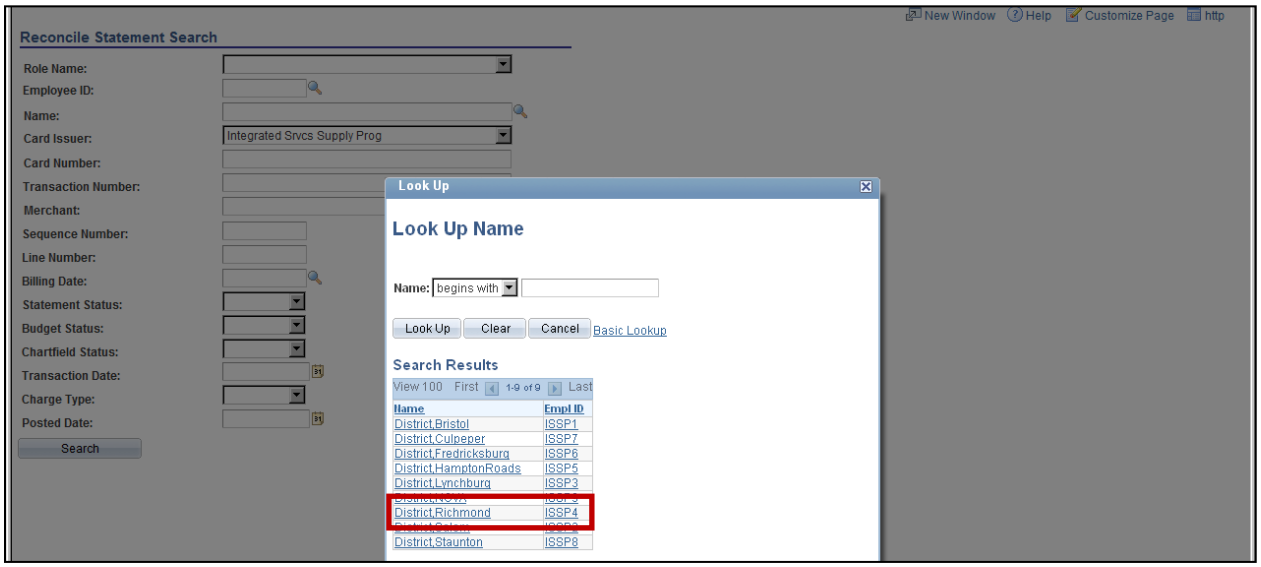


25 Change transactions status to **Approved**.

26 Click **Save**.

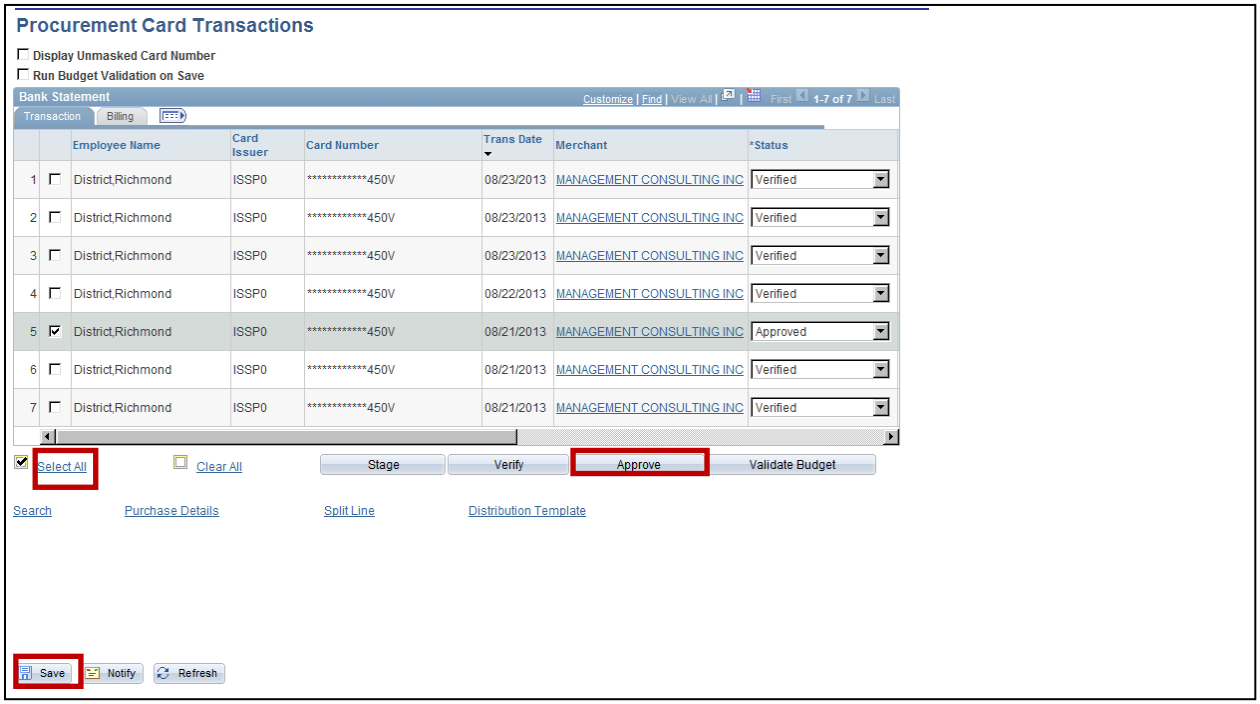
When there are numerous transactions to be approved….

27 Navigate to **Purchasing > Procurement Cards > Reconcile > Reconcile Statement**



28 Narrow your search for a particular district using the **Employee ID** field or any other search criteria.

29 Click on the selected **Empl ID**.



30 Click on the **Select All** hyperlink

31 Click on the **Approve** button and **Save**.