501 PR343
Procurement Approvals

Web Based Training

Rev 7/3/2019

Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Training.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Variety of simulations
- Glossary of frequently used terms

The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.

Course Objectives

After completing this course, you will be able to:

- Understand the Regular Requisition Approval Process
- Understand the WebIMS Requisition Approval Process
- Understand the Purchase Order and Change Order Approval Process
- Understand Strategic Sourcing Event Collaboration
- Understand the PCard Approval and ISSP Approval Process
- Understand the Procurement Contract Approval Process

Agenda

1. Regular and WebIMS Requisition Approval
2. Purchase Order and Change Order Approval
3. Strategic Sourcing Event Collaboration
4. PCard Approval and ISSP Approval
5. Procurement Contract Approval

Lesson 1: Introduction

1 Regular and WebIMS Requisition Approval

This lesson covers the following topics:

- Procurement Approvals Overview
- Regular and WebIMS Requisitions
- Requisitions Approval Workflow
- Regular and WebIMS Requisition Approval Steps

Procurement Overview

The Procurement functional area of Cardinal includes four modules.

Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, Procurement Card (PCard), and Integrated Supply Services Program (ISSP) transactions.

eProcurement

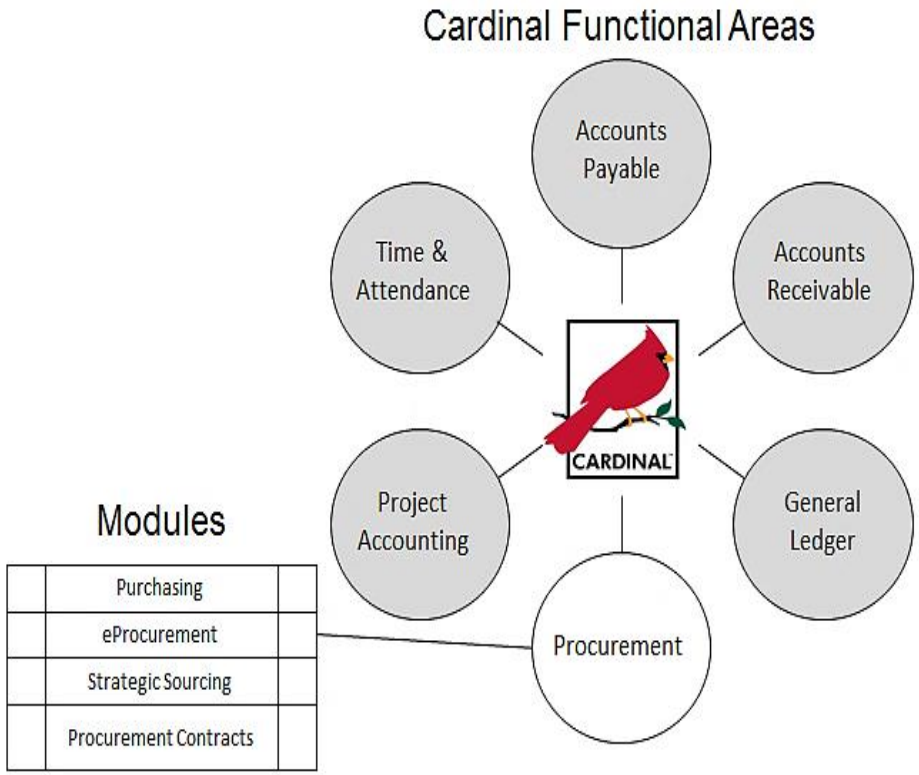
Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids / proposals to purchase orders or contracts.

Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.



Requisition Approval

A request for approval is triggered when a user (Purchase Requisition Processor) submits a regular or WebIMS (VDOT's web-based inventory management system) restock requisition for approval. The approval steps for regular and WebIMS restock requisitions are the same.

Cardinal sends each Approver an e-mail notification when a requisition is ready for approval processing. Requisitions that require approval processing also appear on the Approver's worklist.

The Approver can approve the requisition from the **Worklist** link, from the **Email Notification** link, or from the **Manage Requisition Approvals** page.

Requisition Approval (continued)

Requisitions require two levels of approval:

- **Supervisor:** The Purchase Requisition Requestor‘s Supervisor is the first level of approval, unless the requisition is entered by the requestor’s supervisor. This Approver can approve or deny the requisition.
  - If the requisition is entered by the Requestor’s Supervisor, it goes to that Supervisor’s Supervisor for approval.
    - If the requisition is not approved within 48 hours, workflow routes the requisition to the next level supervisor.

- Approvers can add other relevant users as ad-hoc approvers or reviewers.

Requisition Approval (continued)

Procurement Manager: Once the first level (Supervisor level) approves the requisition, the requisition routes to the Procurement Manager for approval. This Approver can approve or deny the requisition.

- Procurement Managers are part of a pooled approvers list. A requisition that requires approval at the second level of approval is directed to all of the Approvers in that pool. Any Approver in the pool can take action on the requisition; the requisition approval appears on all of their worklists. When one of the Approvers completes an action (e.g., approve, deny, etc.) on the requisition, it is removed from all of the Approvers' worklists on that level.
- If the requisition is not approved within 48 hours, the approval request times out at the second level (Procurement Manager) and routes to the Senior Procurement Manager. This approver can choose to approve or deny the requisition.
- Approvers also have the ability to add other relevant users as ad-hoc approvers or reviewers.
- Procurement Managers are required to insert the Buyer as a Reviewer before clicking the **Approve** button. Adding the Buyer as a Reviewer is a means to assign the Requisition to be worked on as a PO or Sourcing Event.
- After final approval, the Purchase Requisition Processor user who entered the requisition (**Entered By**) receives an email notification, as well as a worklist item, showing the approval. The same is also sent to the Requisition Requestor.

WebIMS Requisition Types

The following are categorized as WebIMS Requisition Types:

- Inventory Issuance Requisitions
    - External Sales – Non-State Agency
    - External Sales – State-Agency
    - Work in Progress (WIP)
- Inventory Restock Requisitions

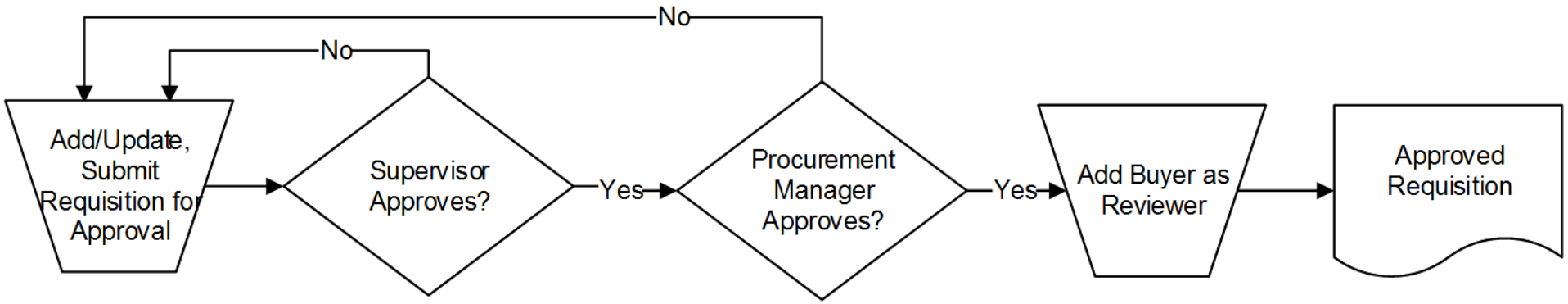
Issuance requisitions (External Sales and Work in Progress) do not route through the workflow approval process. They are automatically approved once the **Submit for Approval** button is clicked by the Storekeeper.

Restock requisitions route through the workflow approval process and follow the same process as regular requisitions.

Requisition Approval Workflow

Regular and WebIMS restock requisitions created by a user in Cardinal can be approved either from the **Worklist** link, **Email Notification** link, or the **Manage Requisition Approvals** page. Access the worklist from the **Home** page or using the following navigation path:

Main Menu > Worklist > Worklist



Requisition Approval Steps

Steps to approve a requisition from the worklist are:

- Click on the hyperlink to access the requisition to be reviewed and approved.
- Select the line(s) to be reviewed and click the **View Line Details** button to see additional details.
- Click **Review/Edit Approvers** to view and/or edit selected Approvers or Reviewers.
- Two options are available for the requisition:
  - Approve - click the **Approve** button.
  - Deny - click the **Deny** button. The Approver must add comments if denied. The user (**Entered By**) is notified by email and worklist item, and given the option to cancel or modify and re-submit. An e-mail is also sent to the Requisition Requestor. If a denied requisition is subsequently edited, saved, and re-submitted, it will go through the approval process again.

The status of a requisition can been viewed on the **Manage Requisition Approvals** page which can be accessed using the following path:

Main Menu > Purchasing > Requisitions > Manage Requisition Approvals

Requisition Approval Steps (continued)

CARDINAL

All | Search | Advanced Search

Favorites | Main Menu > Worklist > Worklist

Worklist

Worklist for JP.MORGAN: MORGAN,JP

Detail View

Worklist Filters | Feed

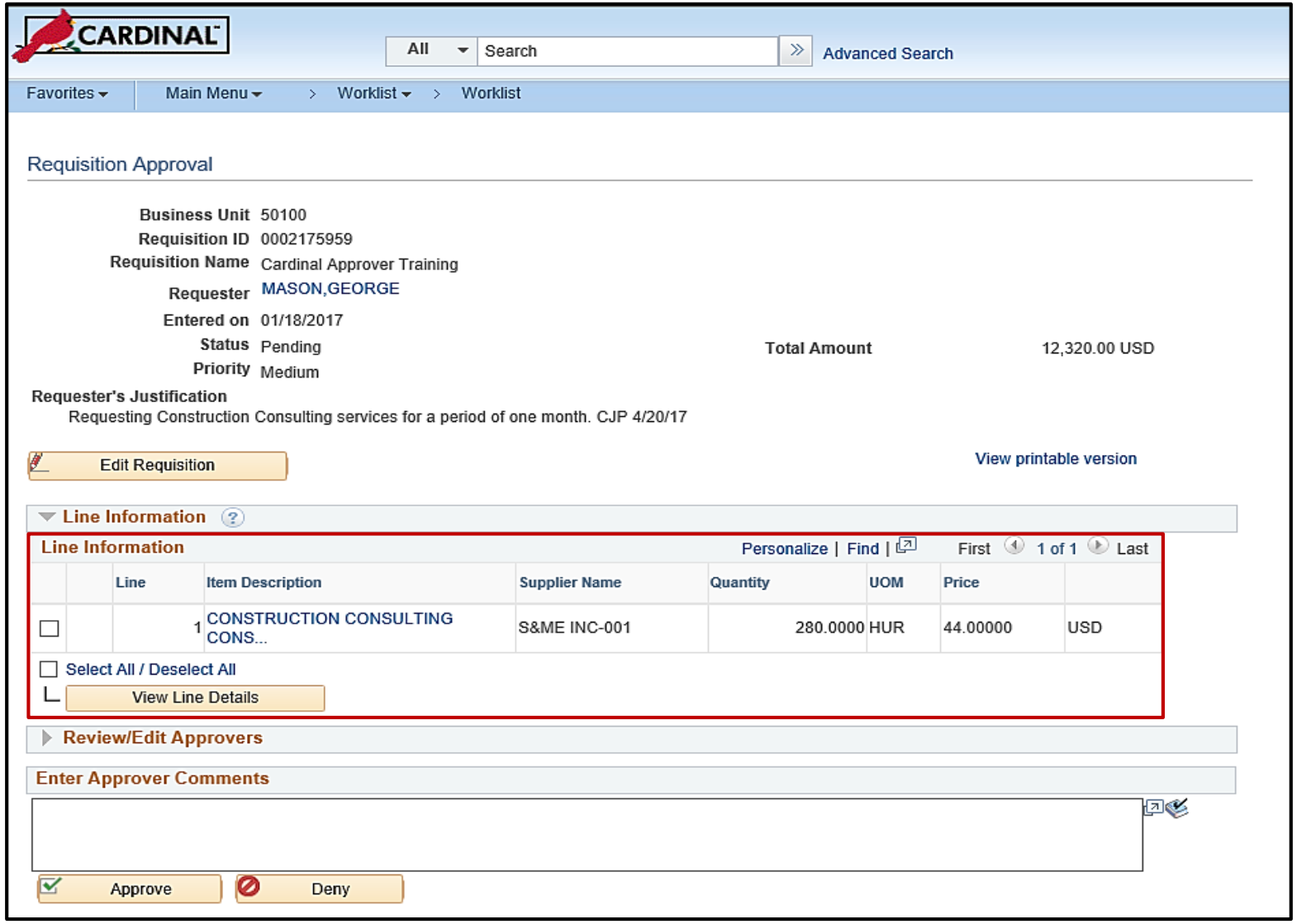
Worklist Items

Personalize | Find | View All | First 1-6 of 6 Last

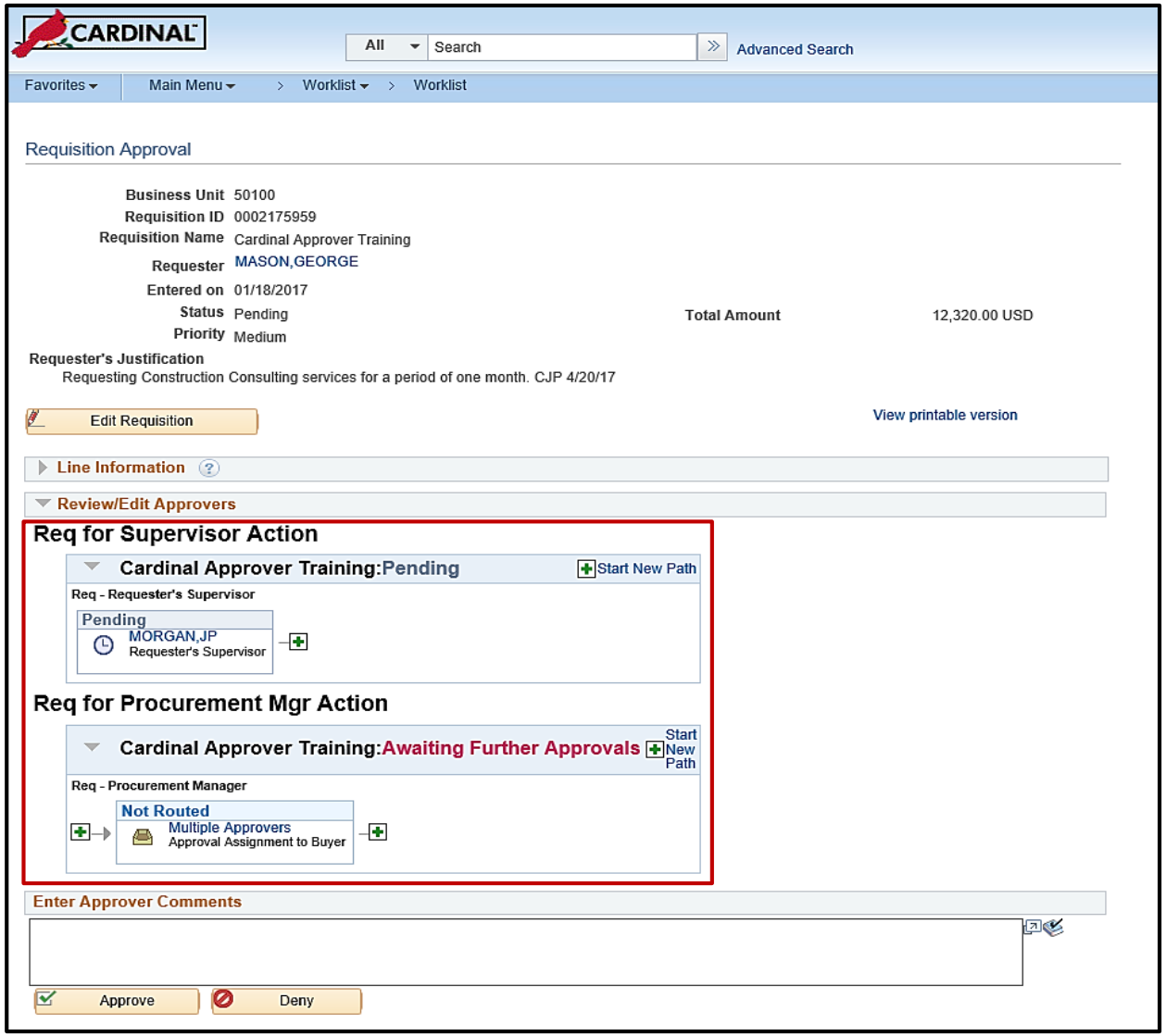
From	Date From	Work Item	Worked By Activity	Priority	Link		
MASON,GEORGE	01/06/2017	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 833159, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001143551,	Mark Worked	Reassign
MASON,GEORGE	01/18/2017	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 833165, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001143555,	Mark Worked	Reassign
MASON,GEORGE	01/18/2017	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 833166, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001143556,	Mark Worked	Reassign
MASON,GEORGE	01/18/2017	Approval Routing	Approval Workflow	2-Medium	Requisition, 1254269, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 REQ_ID:0002175956,	Mark Worked	Reassign
MASON,GEORGE	01/18/2017	Approval Routing	Approval Workflow	2-Medium	Requisition, 1254270, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 REQ_ID:0002175957,	Mark Worked	Reassign
MASON,GEORGE	01/18/2017	Approval Routing	Approval Workflow	2-Medium	Requisition, 1254271, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 REQ_ID:0002175958,	Mark Worked	Reassign

Refresh

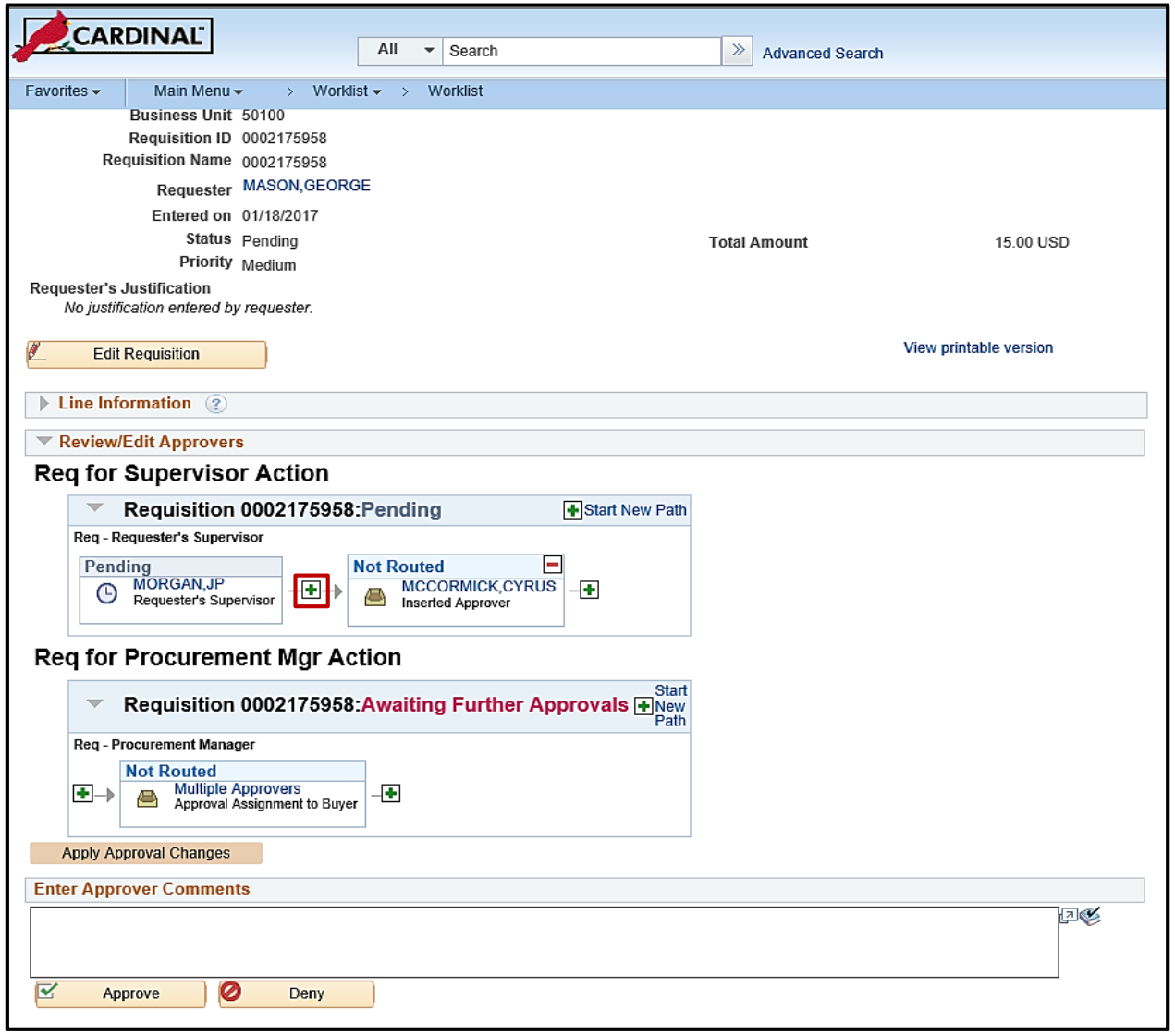
Requisition Approval Steps (continued)



Requisition Approval Steps (continued)

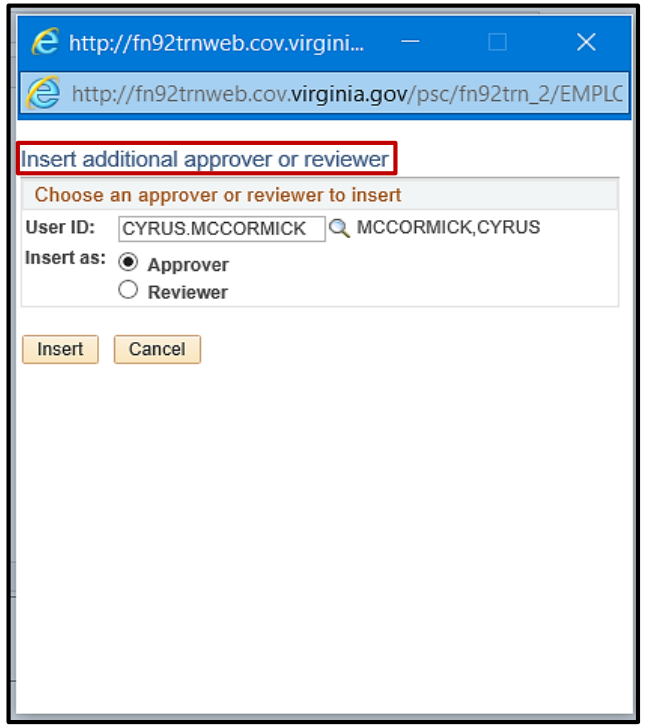


Requisition Approval Steps (continued)



To add an Approver or Reviewer**,** click the green plus sign. The **Insert additional approver or reviewer** pop-up window will display.

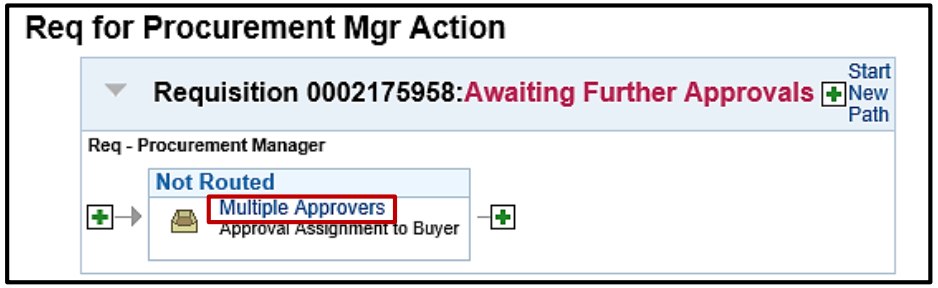
The selected user is inserted into the approval flow as shown.

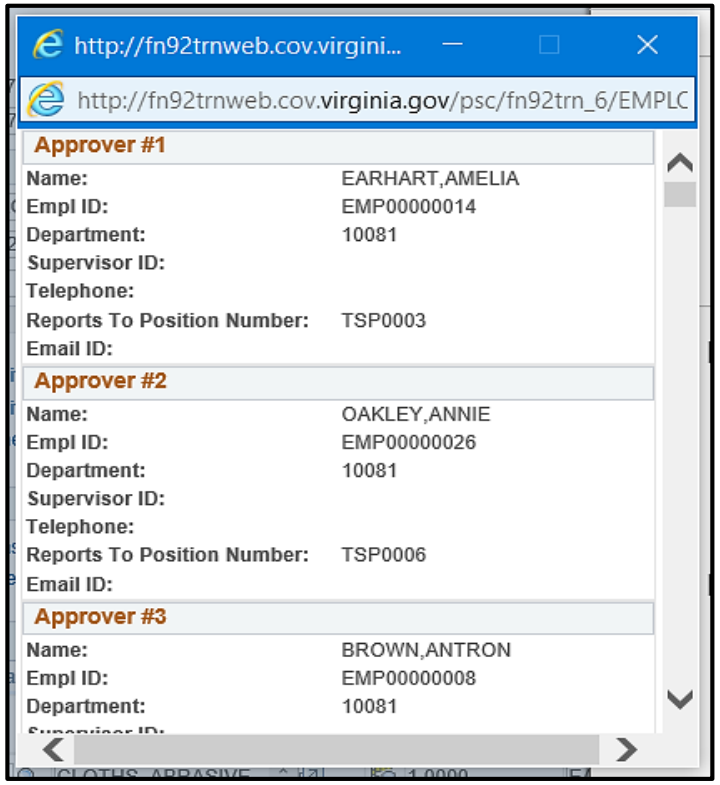


Requisition Approval Steps (continued)

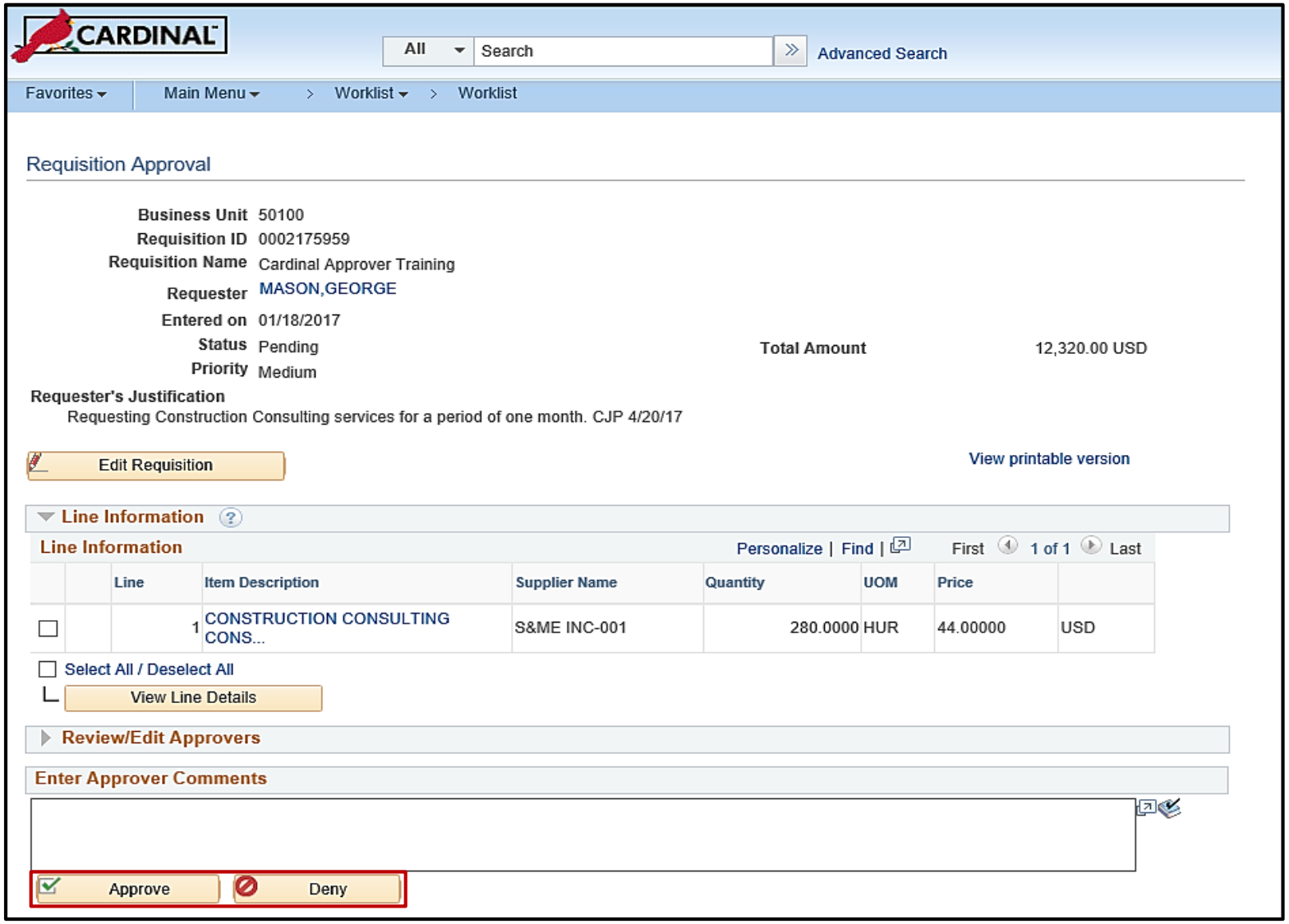
If **Multiple Approvers** are noted, click on the hyperlink to view a list of Approvers. The requisition will be listed on each Approver's Worklist for them to take action.

Once approved by an Approver, the requisition will fall off all the other Approvers' worklists and route as assigned.





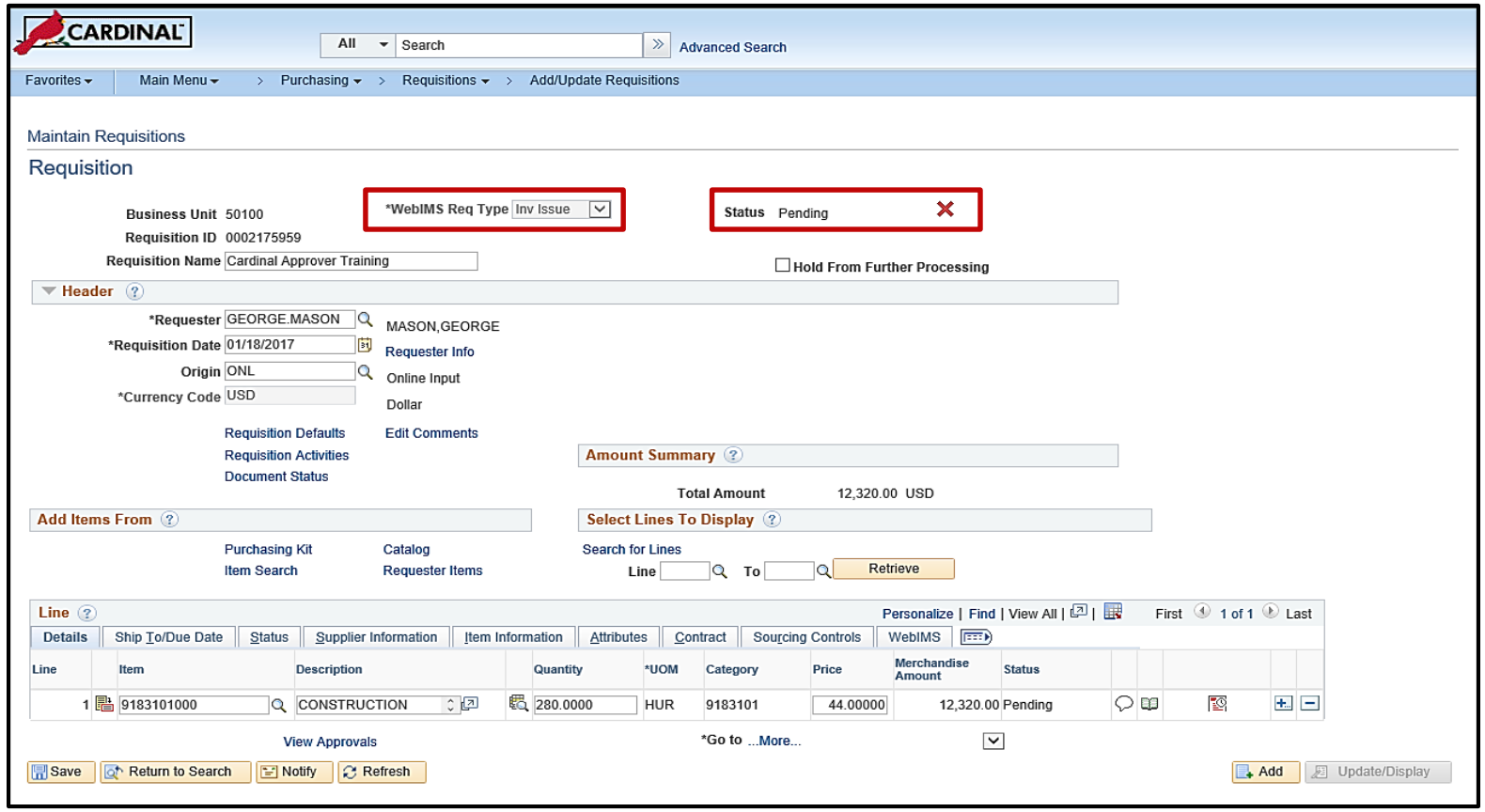
Requisition Approval Steps (continued)



Requisition Approval Status

The status of a requisition can been seen on the **Add/Update Requisitions - Maintain Requisitions** page which can be accessed using the following path:

Main Menu > Purchasing > Requisitions > Add/Update Requisitions



Simulation: Approve Time

You will now view a simulation that demonstrates the requisition approval process.

Click on the icon below to start the simulation.

Lesson 1: Summary

1 Regular and WebIMS Requistion Approval

In this lesson, you learned:

- The Procurement Approvals Process
- Regular and WebIMS Requisitions
- The Requisitions Approval Workflow
- Regular and WebIMS Requisition Approval Steps

Lesson 2: Introduction

2 Purchase Order and Change Order Approval

This lesson covers the following topics:

- Purchase Order Approval Process
- Change Order Approval Process

Purchase Order and Change Order Approval

Purchase Order Approval

A request for approval is triggered when a Buyer submits a purchase order (PO) for approval. Only POs created directly in Cardinal require approval. POs created from a requisition, SiteManager, or eVA do not require approval.

Cardinal sends each Approver an email notification when a PO is ready for approval. Cardinal also sends a reminder e-mail to the Supervisor if the PO is not worked within 24 hours. All POs that require approval processing also appear on the Approver's worklist.

POs can be accessed online from the **Worklist** link or **Email Notification** link. By clicking on the hyperlink in the worklist or notification email, the Supervisor can review the PO and then choose to approve or deny it.

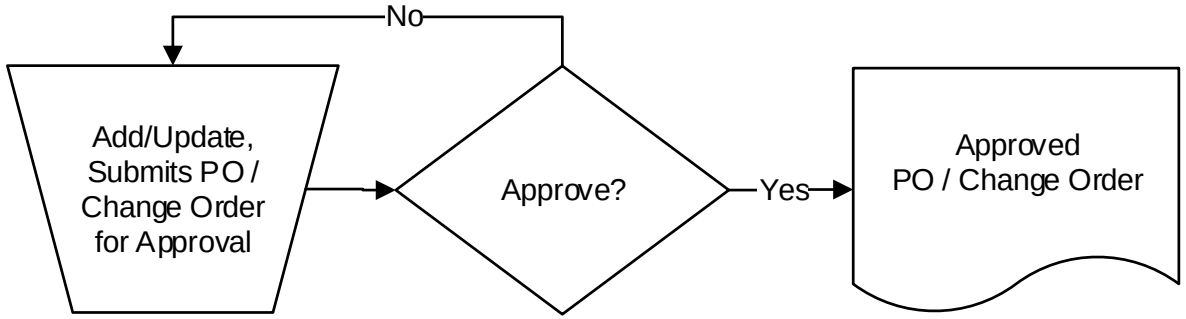
Change Order Approval

Any change to a PO that affects the **Quantity**, **Price**, or **Ship To** fields is called a Change Order. Change orders require approval.

Purchase Order Approval

The approval process for a Purchase Order depends on how the PO was created:

- **POs created in Cardinal** are approved by the Buyer's Supervisor. This is referred to as one level of approval. The Supervisor can approve, deny, or hold the PO.
  - Cardinal sends a reminder e-mail if the PO is not worked within 24 hours.
  - If a PO is not approved within 48 hours, workflow routes the PO to the Supervisor's Supervisor. The Supervisor's Supervisor can approve, deny, hold, or push back the PO.
  - The Buyer receives an email notification if the PO is approved.
- **POs created from a Cardinal requisition** do not need approval since they have already been approved during the requisition process.
- **POs created through the SiteManager or eVA interface** do not need approval in Cardinal. These POs were approved in the Source system.



Purchase Order Approval (continued)

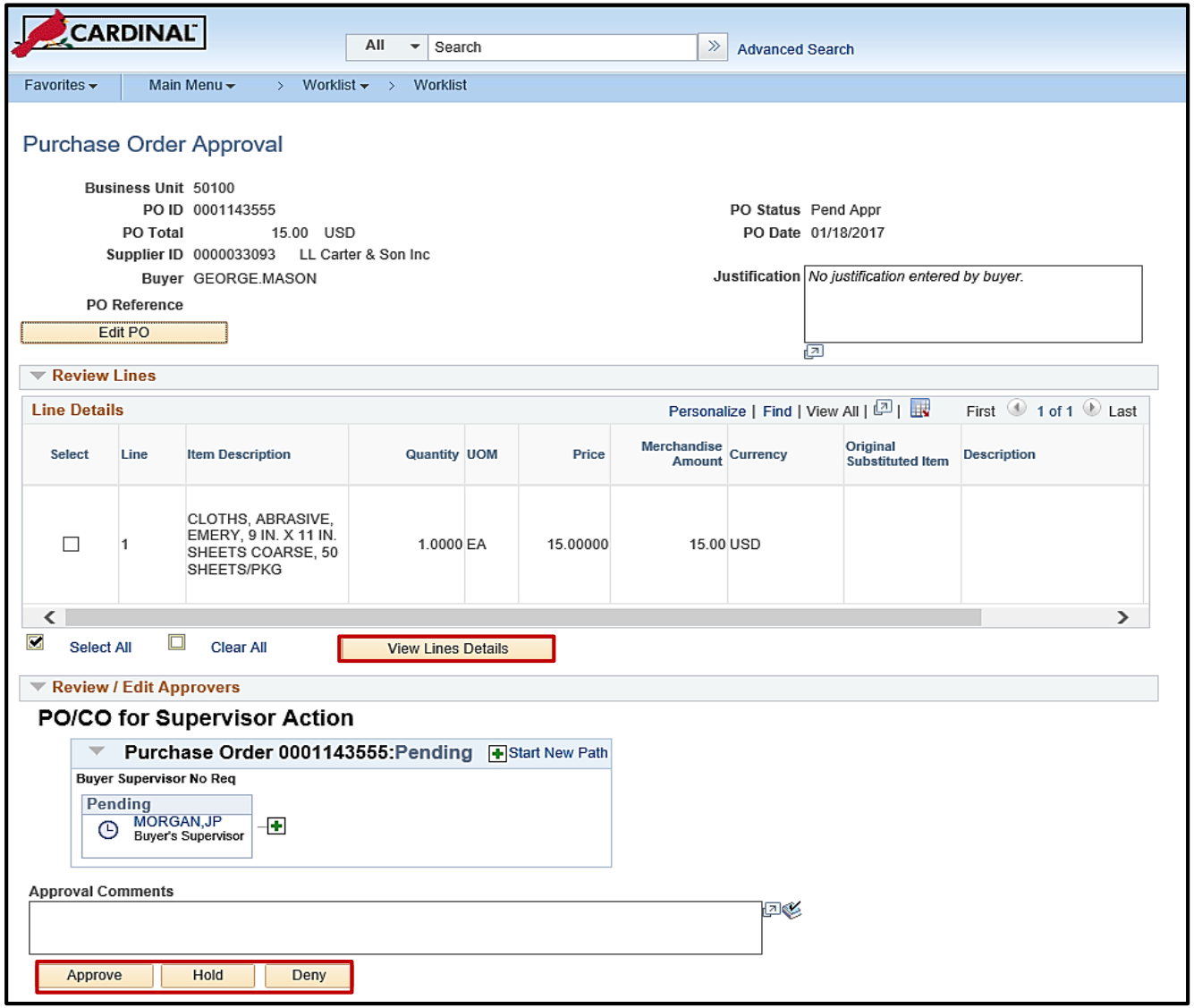
Purchase orders created by a user in Cardinal can be approved from the **Worklist** or **Email Notification** link. If a PO is changed, the changes may trigger the PO to need re-approval. This changed PO will follow the same approval process as the initial Poand is referred to as a change order. To approve POs and change orders, access your worklist from the **Home** page or by using the following navigation path:

Main Menu > Worklist > Worklist

Steps to approve a PO or change order from the worklist are:

- Click on the hyperlink to access the to be reviewed and approved.
- Select the line(s) to reviewed and click the **View Line Details** button to see additional details.
- Click **Review/Edit Approvers** to view and/or edit selected Approvers or Reviewers.
- Three options are available for the PO
  - Approve - click the **Approve** button.
  - Deny - click the **Deny** button. The Approver must add comments if denied. The user (**Entered By**) is notified by email and worklist item, and given the option to cancel or modify and re-submit. An e-mail is also sent to the PO Requestor. If a denied PO is subsequently edited, saved, and re-submitted, it will go through the approval process again.
  - Hold - click the **Hold** button. Placing it on hold reserves it for later action. The hold feature prevents other approvers from taking action on the item. The item will not time out while on hold.

Purchase Order Approval (continued)



Change Order Approval

When the Buyer submits a change order and certain conditions are met, the approval process may be triggered. However, SiteManager and eVA Purchase Order Change Orders are approved prior to being interfaced into Cardinal and therefore do not require further approval in Cardinal.

Cardinal sends the Approver an e-mail notification when a change order is ready for approval. All change orders that require approval appear on the Approver's worklist. Required levels of approval depend on the value of the change order and/or of the original PO. Cardinal sends a reminder e-mail if the Change Order is not worked within 24 hours.

Cardinal compares the originally approved PO amount to the new PO amount. If a PO is changed multiple times the difference is evaluated using the originally approved PO amount and all change orders that have been applied.

Change Order Approval (continued)

POs that have change orders attached to them go through a specific approval routing that depends on the difference between the originally approved PO amount, the change order amount, or if a line was added.

One Level Routing for PO Change Order Approvals:

- Adding a line to a PO will require Supervisor approval.
- Changes < 25% do not need Supervisor approval.
- Changes > 25% will escalate to the Supervisor for approval.
- Changes > 25% or $50,000 (whichever is greater) to PO with original value > $50,000 will escalate to the ASD Director for Approval

Change Order Approval (continued)

Four Level Routing:

Change orders route to the Supervisor, Procurement Manager, Senior Procurement Manager, and Administrative Services Division (ASD) Director when the:

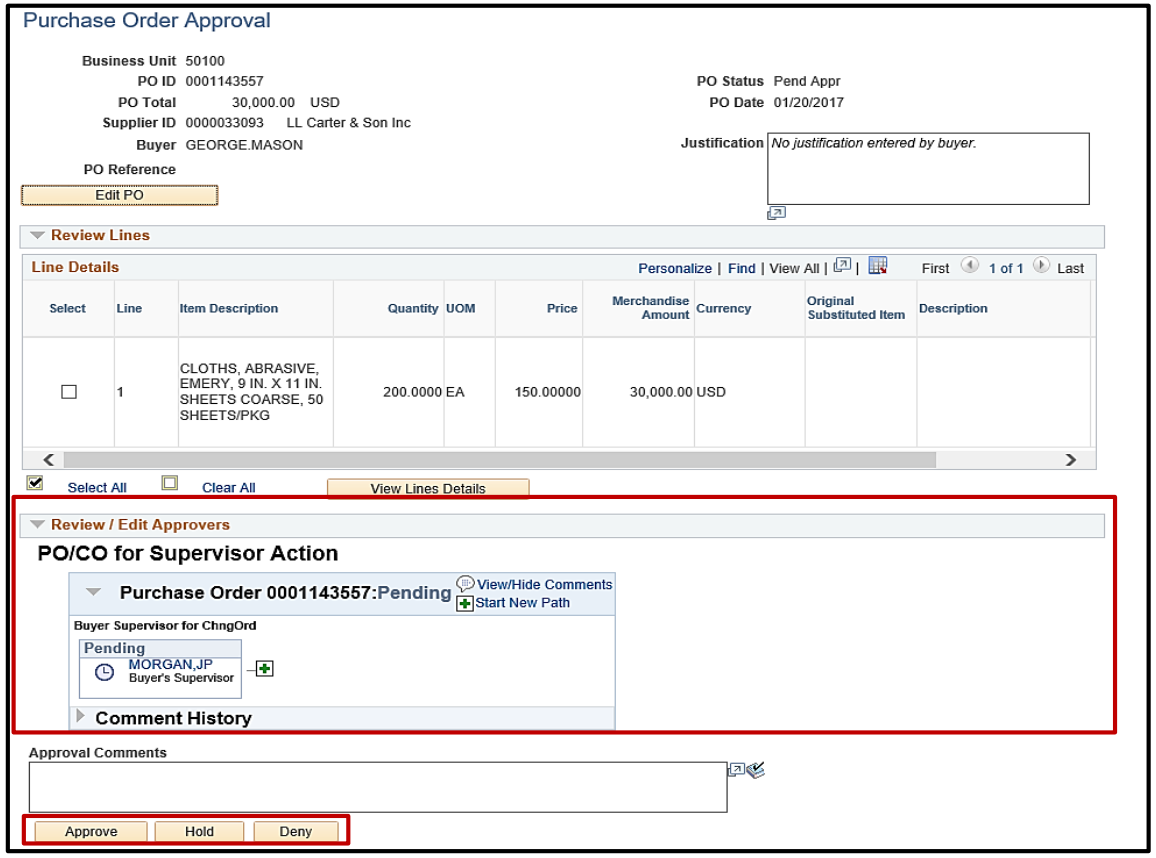
- Original PO value is between $50,000 and $199,999.99 and the change amount is equal to or greater than $50,000. (Original PO ≥ $50,000 and < $200,000 and change amount ≥ $50,000)
- Original PO value is equal to or greater than $200,000 and the change is equal to or greater than 25% of the original PO value. (Original PO ≥ 200,000 and the change is ≥ 25%)
- Procurement Managers (second level), Senior Procurement Managers (third level), and ASD Directors (fourth level) are part of a pooled approvers list. A change order that requires approval at the second, third, and fourth level of approval is directed to all of the approvers in that pool for each respective level of approval. Any approver in the pool can take action on the change order; the change order appears on all of their worklists. When one of the Approvers completes an action (e.g., approve, deny, etc.) on the change order, it is removed from all of the Approvers' worklists on that level.

If none of the change order conditions are met, no routing or approvals are required for the change order.

Change Order Approval (continued)

The **Purchase Order Approval** page shows the approval status is for the purchase order and any subsequent change orders for that purchase order. Access this page using your worklist on your **Home** page or using the following path:

Main Menu > Worklist > Worklist



Simulation: Approve Time

You will now view a simulation that demonstrates the purchase order approval process.

Click on the icon below to start the simulation.

Lesson 2: Summary

2 Purchase Order and Change Order Approval

In this lesson, you learned:

- How to Approve a Purchase Order
- How to Approve a Change Order

Lesson 3: Introduction

3 Strategic Sourcing Event Collaboration

This lesson covers the following topic:

- Strategic Sourcing Event Collaboration

Strategic Sourcing Event Collaboration

A request for collaboration is triggered when an event creator (Strategic Sourcing Buyer) invites one or several Collaborators to provide input for an event.

A Collaborator can be added at the beginning or at the end of an event to provide input.

Collaboration may be required for solicitations above the buyer's delegated authority. Each Collaborator completes their input following the routing sequence assigned to the event.

Cardinal sends an email notification to the first Collaborator set up in the routing sequence for the strategic sourcing event. This email notifies the Collaborator that their input has been requested for the event. Other Collaborators set up for the event receive a worklist and email notifications once the previous Collaborator(s) complete their analysis.

To learn more about Collaboration, please refer to the job aid entitled **501 PR345: Strategic Sourcing Collaboration**. Job aids are located on the Cardinal website in the VDOT Toolbox.

Strategic Sourcing Event Collaboration (continued)

Each collaborator provides input to the event by accessing it from their **Worklist** hyperlink, the **Email Notification** hyperlink, or from the **Analyze Events** page.

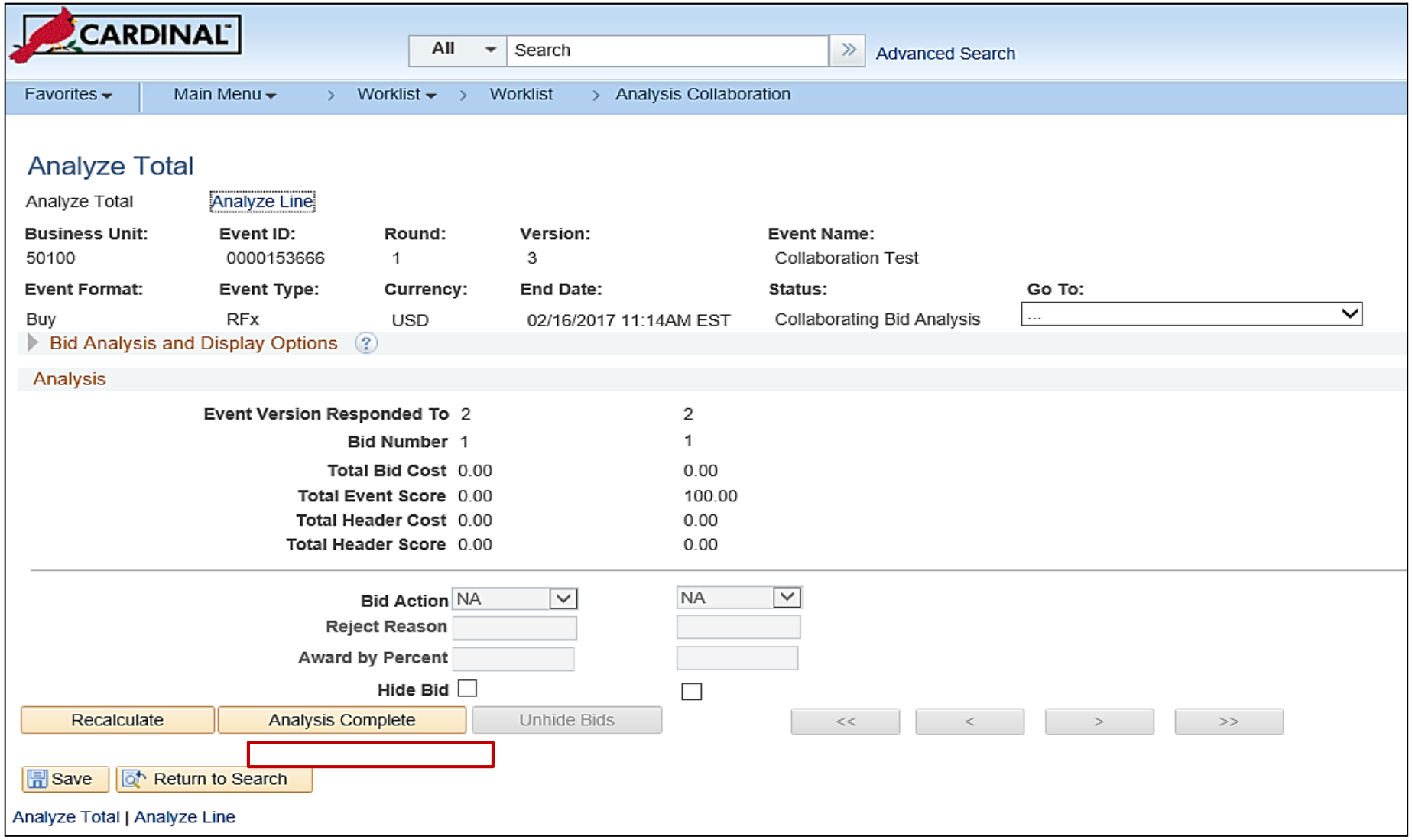
You can navigate to the **Analyze Events** page using the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

To provide input to the Strategic Sourcing event:

- Search for the event.
- Review all details on the **Analyze Total** and **Analyze Line** pages based on relevant policies.
- Click the **Analysis Complete** button. This completes the review and marks the collaboration as complete. Clicking this button also routes the event to the next Collaborator in the routing sequence assigned to the event, if applicable.
- If the due date has passed and no action has been taken, an email notification and worklist item are sent to the event creator.

Strategic Sourcing Event Collaboration (continued)



Lesson 3: Summary

3 Strategic Sourcing Event Collaboration

In this lesson, you learned:

- How to Collaborate on a Strategic Sourcing Event

Lesson 4: Introduction

4 PCard and ISSP Approval

This lesson covers the following topics:

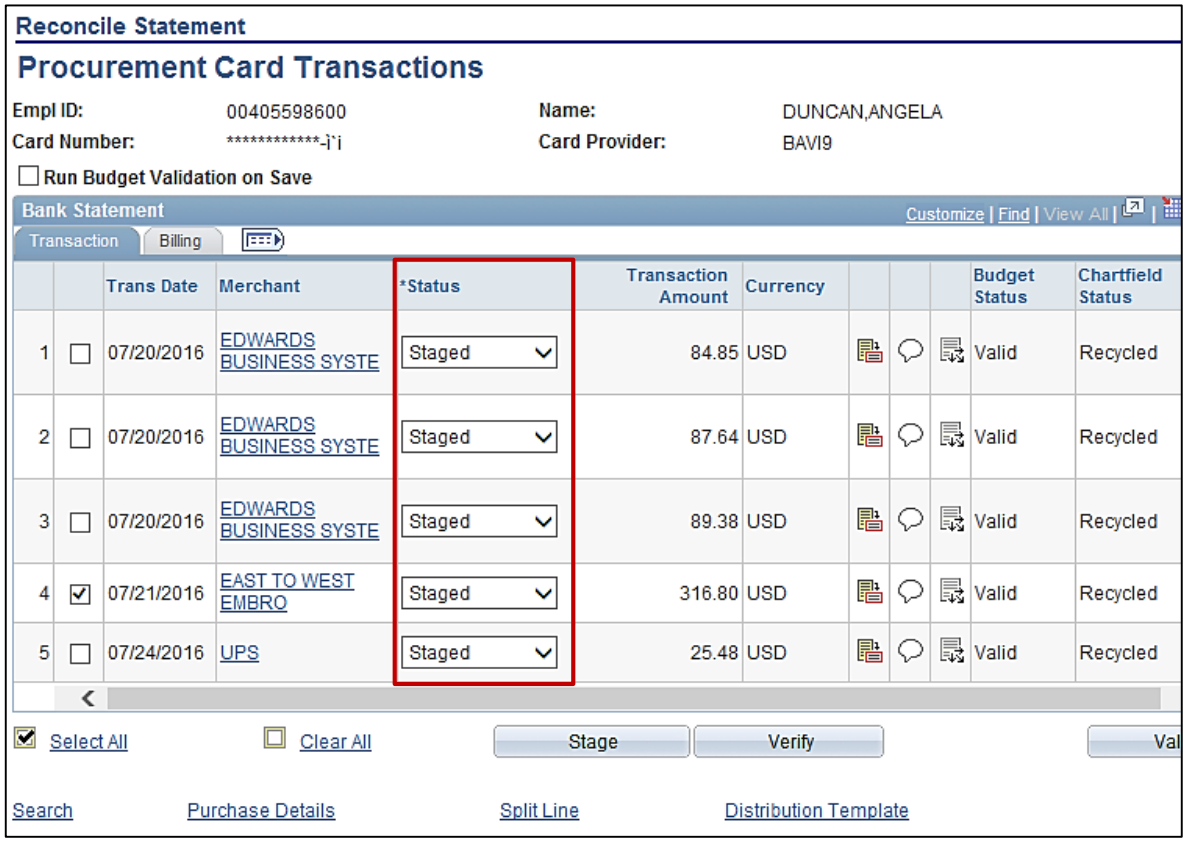
- PCard and ISSP Approval Steps
- Verifying PCard and ISSP Charges
- Setting up the PCard Verified Charges by User Pagelet

PCard and ISSP Approval

PCard and ISSP transactions are loaded into Cardinal daily from an electronic file that is sent in by the Supplier. The initial status of the transaction is **Staged**.

The Card Holder must reconcile each transaction, as soon as possible, to ensure timely approval by their Supervisor.

Additional information about PCard and ISSP reconciliations can be found the job aid titled **501 PR349: PCard & ISSP Reconciliation and Approvals**.



PCard and ISSP Approval (continued)

A request for approval is triggered when a Card Holder changes a Card transaction status from **Staged** to **Verified.**

An alert on the **PCard Verified Charges by User** pagelet shows that the PCard transaction is ready for approval processing. All Card transactions that require approval processing appear on the pagelet.

Approvers should regularly refresh the pagelet to see which items they need to process for approval.

Cardinal does not automatically notify users when items are not approved. The Approver must notify the user of any items not approved in order to resolve the issue. Items not approved remain in **Staged** status until updated and approved, or deleted.

The Supervisor associated to the card makes the approvals on the **Reconcile Statement** page, which can be accessed using the transaction hyperlinks on the **PCard Verified Charges by User** pagelet.

Navigate to the **Reconcile Statement** page using the following path:

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile Statement

To learn more about processing PCard and ISSP transactions, please refer to the course titled **501 PR349: Managing PCards and ISSP Transactions**.

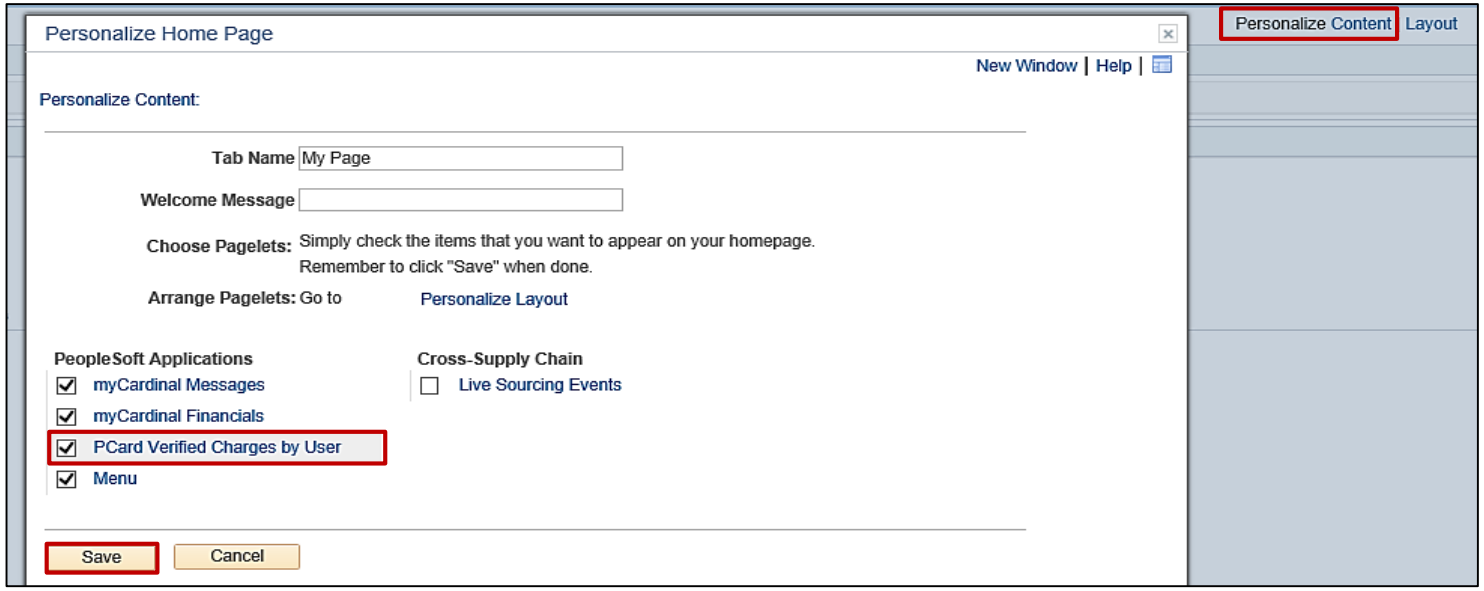
PCard and ISSP Approval (continued)

Each Card Approver must set up the **PCard Verified Charges by User** pagelet to process card transaction approvals. The **PCard** pagelet contains both PCard and ISSP transactions with a status of **Verified**.

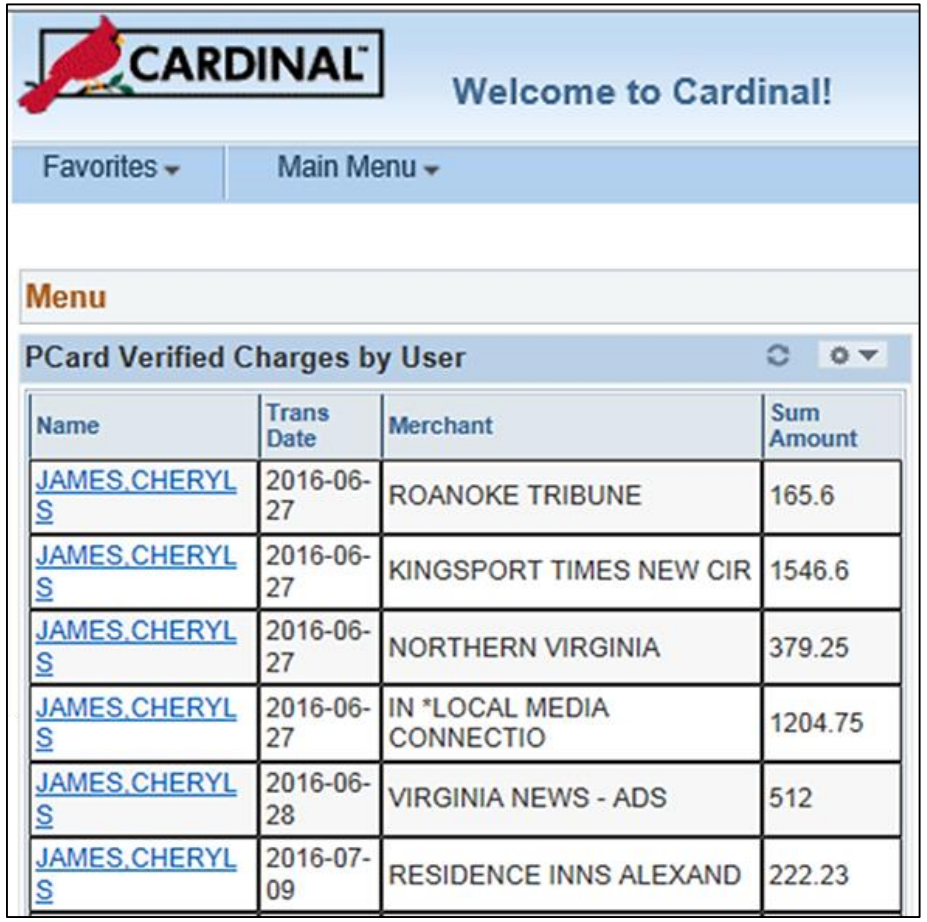
To set up the pagelet:

- From the **Home** page, click on **Personalize Content**.
- Click the checkbox for **PCard Verified Charges by User** to select it, then click **Save**.

Refresh and check the **PCard** pagelet daily and take appropriate action (i.e., approve or deny the transactions).



PCard and ISSP Approval (continued)



Name	Trans Date	Merchant	Sum Amount
JAMES,CHERYL S	2016-06-27	ROANOKE TRIBUNE	165.6
JAMES,CHERYL S	2016-06-27	KINGSPORT TIMES NEW CIR	1546.6
JAMES,CHERYL S	2016-06-27	NORTHERN VIRGINIA	379.25
JAMES,CHERYL S	2016-06-27	IN *LOCAL MEDIA CONNECTIO	1204.75
JAMES,CHERYL S	2016-06-28	VIRGINIA NEWS - ADS	512
JAMES,CHERYL S	2016-07-09	RESIDENCE INNS ALEXAND	222.23

PCard and ISSP Approval (continued)

PCard and ISSP transactions require one level of approval:

- **PCard Supervisor or ISSP Manager** - The Supervisor(s) who is associated to the card (may not be the user's Supervisor) is the only level of approval.
  - This Approver can approve the transaction, dispute the amount if incorrect, or notify the user if there is an issue with the transaction.
  - The Approver must manually notify the PCard Holder when a PCard transaction is not approved. Cardinal does not generate an email to the PCard Holder.
  - Users can also search for their transactions and review the status.

PCard and ISSP Approval (continued)

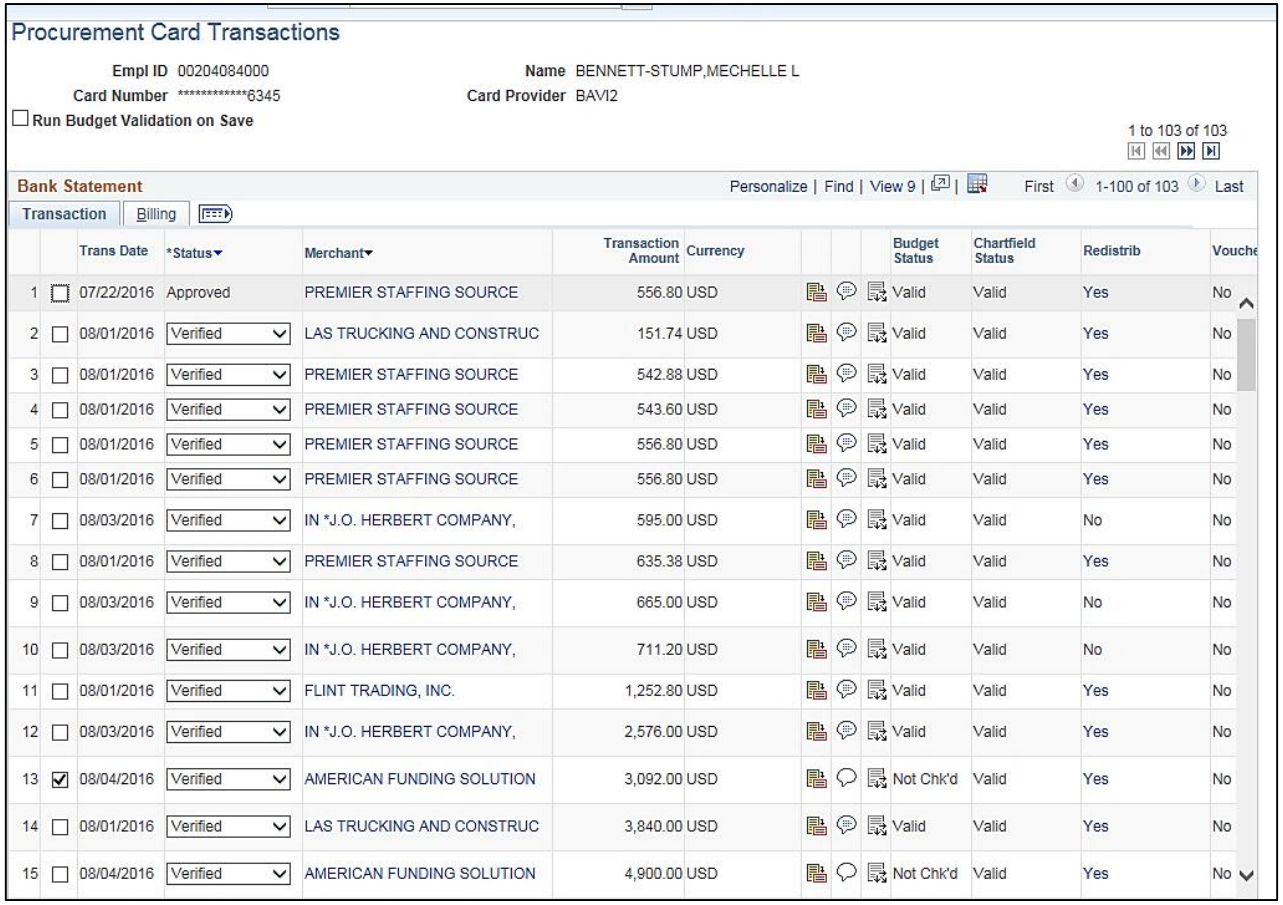
PCard and ISSP transactions are approved on the **Reconcile Statement** page, which can be accessed through the **PCard Verified Charges by User** pagelet.

You can navigate to the pagelet using the following path:

Main Menu > PCard Verified Charges by User (this information can also be accessed from the pagelet on the **Home** page as shown previously)

The following path is an alternative path to the **Reconcile Statement** page:

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile Statement



Procurement Card Transactions

Empl ID 00204084000 Name BENNETT-STUMP,MECHELLE L
Card Number **********6345 Card Provider BAVI2
Run Budget Validation on Save

1 to 103 of 103

Bank Statement Personalize | Find | View 9 | First 1-100 of 103 Last

Transaction Billing

		Trans Date	*Status	Merchant	Transaction Amount	Currency	Budget Status	Chartfield Status	Redistrib	Vouche
1	☐	07/22/2016	Approved	PREMIER STAFFING SOURCE	556.80	USD	Valid	Valid	Yes	No
2	☐	08/01/2016	Verified	LAS TRUCKING AND CONSTRUC	151.74	USD	Valid	Valid	Yes	No
3	☐	08/01/2016	Verified	PREMIER STAFFING SOURCE	542.88	USD	Valid	Valid	Yes	No
4	☐	08/01/2016	Verified	PREMIER STAFFING SOURCE	543.60	USD	Valid	Valid	Yes	No
5	☐	08/01/2016	Verified	PREMIER STAFFING SOURCE	556.80	USD	Valid	Valid	Yes	No
6	☐	08/01/2016	Verified	PREMIER STAFFING SOURCE	556.80	USD	Valid	Valid	Yes	No
7	☐	08/03/2016	Verified	IN *J.O. HERBERT COMPANY,	595.00	USD	Valid	Valid	No	No
8	☐	08/01/2016	Verified	PREMIER STAFFING SOURCE	635.38	USD	Valid	Valid	Yes	No
9	☐	08/03/2016	Verified	IN *J.O. HERBERT COMPANY,	665.00	USD	Valid	Valid	No	No
10	☐	08/03/2016	Verified	IN *J.O. HERBERT COMPANY,	711.20	USD	Valid	Valid	No	No
11	☐	08/01/2016	Verified	FLINT TRADING, INC.	1,252.80	USD	Valid	Valid	Yes	No
12	☐	08/03/2016	Verified	IN *J.O. HERBERT COMPANY,	2,576.00	USD	Valid	Valid	Yes	No
13	☑	08/04/2016	Verified	AMERICAN FUNDING SOLUTION	3,092.00	USD	Not Chk'd	Valid	Yes	No
14	☐	08/01/2016	Verified	LAS TRUCKING AND CONSTRUC	3,840.00	USD	Valid	Valid	Yes	No
15	☐	08/04/2016	Verified	AMERICAN FUNDING SOLUTION	4,900.00	USD	Not Chk'd	Valid	Yes	No

PCard and ISSP Approval Steps

To approve a transaction:

- Click on the hyperlink for the transaction to be reviewed in the **PCard Verified Charges by User** pagelet.
- Review all details based on relevant policies.
- There are two options:
  - Click on the **Approve** button to submit your approval.
  - If the transaction amount is incorrect, enter a dispute amount for the transaction.
    - On the **Billing** tab, enter the dispute amount in the **Dispute Amount** field.
    - Click the **Comment** icon on the **Transaction** tab to enter a detailed comment about the transaction. The comment should explain why the transaction is being disputed.
    - Set the transaction status to **Approved.**
- The Approver must manually notify the user of any items they do not approve in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

Approved transactions are transmitted to Accounts Payable and supplier payments are processed monthly for PCard and daily for ISSP. The agency pays the full amount and may later receive a credit from the supplier for any disputed amounts.

PCard and ISSP Approval Steps (continued)

Reconcile Statement

Procurement Card Transactions

Empl ID 00052056100 **Name** MAHONE,CARRIE J

☐ **Run Budget Validation on Save**

Bank Statement Personalize | Find | View 9 | First 1-96 of 96

Transaction | Billing

		Card Issuer	Card Number	Trans Date	Merchant	*Status	Transaction Amount	Currency	Bu Sta
14	☐	BAVI0	**********1845	06/17/2016	XEROX CORPORATION/RBO	Approved	454.63	USD	Va
15	☐	BAVI0	**********1845	06/17/2016	XEROX CORPORATION/RBO	Approved	1,066.27	USD	Va
16	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	75.50	USD	Va
17	☑	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	35.08	USD	Va
18	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	113.25	USD	Va
19	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	33.63	USD	Va
20	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	214.14	USD	Va
21	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	70.16	USD	Va
22	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	188.75	USD	Va
23	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	75.50	USD	Va
24	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	185.50	USD	Va
25	☐	BAVI0	**********1845	07/28/2016	ENTERPRISE RENT-A-CAR	Staged	113.25	USD	Va
26	☐	BAVI0	**********1845	07/20/2016	MERREDITH'S REST & CATER	Staged	528.00	USD	Va
27	☐	BAVI0	**********1845	06/15/2016	SAMSCLUB #4788	Approved	57.35	USD	Va
28	☐	BAVI0	**********1845	06/29/2016	HOLIDAY INN CONFERENCE CE	Approved	97.28	USD	Va
29	☐	BAVI0	**********1845	07/07/2016	HOLIDAY INN CONFERENCE CE	Approved	97.28	USD	Va

☑ Select All ☐ Clear All

Stage | Verify | Approve | Validate Budget

Simulation: Approve Time

You will now view a simulation that demonstrates the PCard transaction approval process.

Click on the icon below to start the simulation.

Lesson 4: Summary

4 Pcard and ISSP Approval

In this lesson, you learned:

- How to Process PCard and ISSP Approvals
- How to Verify PCard and ISSP Charges
- How to Set Up the PCard Verified Charges by User Pagelet

Lesson 5: Introduction

5 Procurement Contract Approval

This lesson covers the following topic:

- Procurement Contract Approval Steps

Procurement Contract Approval

Procurement contracts entered in Cardinal require approval. A contract is ready for approval after the Purchasing Contracts Administrator has created the contract and reviewed it.

The Purchasing Contracts Administrator sets the procurement contract **Status** to **Approved** to allow transactions to be processed against the contract. There is no workflow notification associated with contracts.

The Purchasing Contracts Administrator approves the contract on the **Add/Update Contracts** page. For more information about procurement contracts, please refer to the course entitled **501 PR348: Entering Procurement Contracts**.

Procurement Contract Approval Steps

Procurement contracts require one level of approval. In order for a contract to be used it must be approved.

- **Purchasing Contracts Administrator**: Follow the appropriate agency policies and procedures for any manual evaluation, processing, and approval required for contract approval.

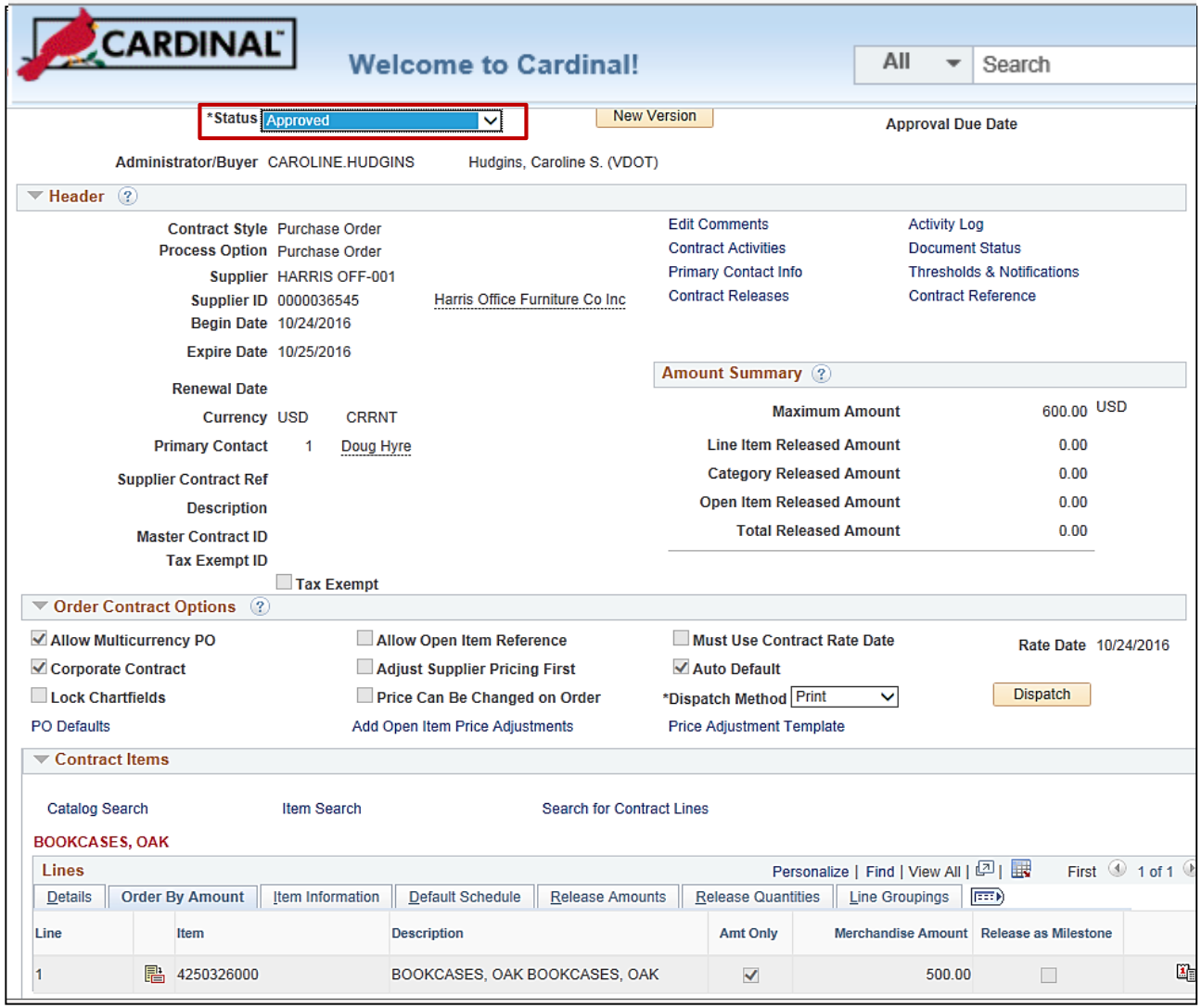
Procurement contracts are approved on the **Add/Update Contracts** page.

Navigate to this page using the following path:
Main Menu > Procurement Contracts > Add/Update Contracts

To approve a procurement contract:

- Click the **Status** drop-down box, select **Approved**. The contract will not be available if the contract's **Status** is **Open** or **Draft**.
- Click **Save**.
- New versions to a contract may be needed and the contract will need to be reapproved. For example, if the contract's expiration date has passed and it is updated, the contract will need to be reapproved.

Procurement Contract Approval Steps (continued)



Lesson 5: Summary

5 Procurement Contract Approval

In this lesson, you learned:

- How to Approve Procurement Contracts

Course: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.

Approvers can approve or deny parts of a requisition or purchase order?

- True
- False

Which of the following Procurement items are approved through a pagelet?

- Requisitions
- Contracts
- PCard and ISSP transactions
- None, they are all approved on the page or through the worklist

Course Summary

PR343 Procurement Approvals

In this course, you learned:

- Understand the Regular Requisition Approval Process
- Understand the WebIMS Requisition Approval Process
- Understand the Purchase Order and Change Order Approval Process
- Understand Strategic Sourcing Event Collaboration
- Understand the PCard Approval and ISSP Approval Process
- Understand the Procurement Contract Approval Process

Course Evaluation

Congratulations! You successfully completed the **501 PR343: Procurement Approvals** course.

Click here to access the evaluation survey for this course.

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the [**X**] button in the upper right corner.

Appendix

- Flowchart Key

Flowchart Key

Step Description	Depicts a process step or interface.	Start	Indicates point at which the process begins. Does not represent any activity.
Batch Process	Specifies a batch process.	End	Indicates point at which the process ends. Does not represent any activity.
Manual Operation	Depicts a process step that is preformed manually.	Document	Depicts a document of any kind, either electronic or hard copy.
Decision Outcome	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.	X	Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
Entity Name	Represents an entity (person, organization, etc.).	Step/ Process	Connects steps between business processes.