PEOPLESOFT FINANCE ELECTRONIC FORMS

SPCC Cardholder Training Guide

Cash and Investments Office Contact: appa@jmu.edu

SPCC Cardholder Training

PeopleSoft Electronic Forms-updated 12/6/22 appa@jmu.edu

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Overview

Beginning August 1, 2021, the following forms for the Small Purchase Charge Card (SPCC) will be moved from paper or email format to electronic format within the PeopleSoft Finance System. All cardholders are expected, on this date, to use these forms for the following requests:

- SPCC New Cardholder Applications
- Managing SPCC Reconcilers
- Cancel SPCC
- Monthly Credit Limit Increases
- Single Transaction Increases
- Exception Requests

All forms will be electronically routed to your supervisor for approval then to the Cash and Investments Office or Accounting Technology for final approval and processing. All active cardholders will have access to PeopleSoft Finance to initiate these forms. Supervisors, who have access to PeopleSoft Finance, will be able to approve them within the system; those without access will have the approvals on their MyMadison dashboard. For each request, a cardholder will receive confirmation emails that should be printed and kept with their SPCC records for audit purposes.

Form Location-PeopleSoft Finance

PeopleSoft Finance can be reached from the Quick Login Access page on the JMU website: <u>James Madison</u> <u>University - Quick Login Access (jmu.edu</u>). In the green shaded box, you will see Finance listed first. Click on this link.

JAMES MAD	SON UNIVE	RSITY.		MORE JMU	✓ Search JMU Q,
ADMISSI	ONS ACADEMICS	STUDENT LIFE	VISIT	TUITION & FINANCIAL AID	ATHLETICS
	Quick Logi	n Access			
IT HOME SERVICES				Sea	rch Computing GO
ACCOUNTS & ACCESS Quick Login Access All Accounts & Access Affiliate Accounts eID Two Factor Authentication (Duo) ADMINISTRATIVE &	HR Management JobLink - Manager JobLink - Applicant	Finan		Student Administration MyMadison Graduate School Admit	Advance iModules Cognos Fundriver
ADMINISTRATIVE & V BUSINESS					

This will take you to the PeopleSoft Finance login page. You will use your e-id and password to log into this system. System access does require Duo authentication.

	James Madison University Login Page
TODISON UNITED TO	Help Accessibility Looout JMU eID:

- 1. You will click on the navigation
- Ø

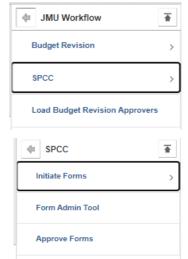
button in the upper right corner.

2. Choose JMU Applications, then JMU Workflow

	JMU Applications	>
ecent Places	Purchasing	>
*	Real Time Bottom Line	>
ly Favorites	Reporting Tools	>
Navigator	JMU Favorites	>
	PeopleTools	>
	My Dictionary	

JMU Applications	Ŧ
Accounts Payable	>
Bank	>
Department	>
Misc Finance	>
General Ledger	>
Security	>
Cardinal	>
Deposit Maintenance	>
Travel Expense	>
JMU Workflow	>
JMU File Parse	>

3. Choose SPCC from the JMU Workflow menu



4. Choose Initiate Forms from the SPCC menu

5. From the Initiate Forms Menu these options are available:

SPCC Application

This form is to be used by any JMU Faculty, Classified or Wage Staff member who needs to request a Small Purchase Charge Card (SPCC).

Manage Reconcilers

This form is to be used by any current SPCC cardholder who needs to add or delete employees to reconcile their transactions in the Bank of America WORKS system

Cancel SPCC

This form is to be used by cardholders or their supervisors to cancel a current SPCC. Reasons to cancel a card include when an employee leaves employment with the university or changes positions.

Monthly Credit Limit Increases

This form is to be used by cardholders to request increases to their overall monthly credit limit on their SPCC either temporarily or permanently.

Single Transaction Increases

This form is to be used by cardholders to request increases to their single transaction credit limit on their SPCC either temporarily or permanently. Increases over \$10,000 must include a copy of the invoice and eVA EP/PCO or Procurement written approval.

Exception Requests

This form is used by cardholders to request any exception to a Merchant Category Code (MCC) restriction on the SPCC. These restrictions can include the restaurant block or accommodation block.

Initiate Forms
SPCC Application
Manage Reconcilers
Cancel SPCC
Monthly Credit Limit Increase
Single Transaction Increase
Exception Request

To begin initiation of a form, you will click on the appropriate form name and fill out the requested information.

Form Examples

SPCC Application

This form is to be used by any JMU Faculty, Classified or Wage Staff member who needs to request a Small Purchase Charge Card (SPCC). The following fields will be automatically filled in based on your e-id and password:

<u>Applicant's Eid</u> <u>HR/Employee ID#</u> <u>Application's Name</u> <u>Date of Birth</u> <u>JMU Email Address</u>

The new cardholder must fill in the following information:

<u>Student?</u> This is either Yes or No. If you are a student, you are not eligible for an SPCC. <u>JMU Physical Address:</u> This is your JMU office address <u>JMU Phone Number:</u> This is your JMU office phone number <u>Applicant's MSC</u>: This is your departmental MSC <u>Default Deptid:</u> This is your departmental ID (org) number <u>Supervisor's Name:</u> This is your supervisor's name <u>Supervisor's Email</u>: This is your supervisor's JMU email address <u>Transaction Limit</u>: This is the single transaction limit on your card. (typically \$10,000) <u>Monthly Limit</u>: This is your overall monthly credit limit. (typically between \$10,000-\$100,000) <u>Reconciler(s) for Card</u>: These employees can reconcile your charges in the PeopleSoft Finance System. List their e-ids. **If you want to reconcile your own card, you must list yourself as well.**

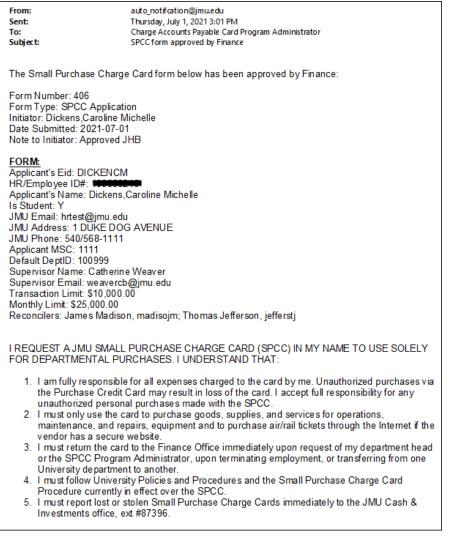
	w to apply for a James Madison University Small Purchase Charge
tnemselves. Once the to for approval.	oplying for the SPCC must complete and submit this application orm is submitted, the application will be routed to your Supervisor
Applicant's E	Eid: DICKENCM
HR/Employee I	D#:
Applicant's Nar	me: Dickens,Caroline Michelle
	rth: 02/06/1986
Studer	nt?: Yes
JMU Email Addre	
	I DUKE DOG AVENUE S5: Include Street, City, State, and Zip code
	e #: 540568-1111
	Include area code
Applicant's M	
Default Dep	
Supervisor's Nar	
Supervisor's Em	ail: weavercb@Jmu.edu
Transaction Lir	
Monthly Lin	
Reconciler(s)	for James Madison, madisolm: Thomas Jefferson, jeffersti
C.	Include the First / Last Name and Eld of all reconciler(s) to be added to
	the card, separated by a comma. If the ability is needed to reconcile your own card, your name must be included here.
tickets thro 3. I must retu departmen employme 4. I must folic Charge Ca 5. I must repc JMU Cash 6. I understar	use the card to purchase goods, supplies, and services for maintenance, and repairs, equipment and to purchase ai/rail ugh the Internet if the vendor has a secure website. In the card to the Finance Office immediately upon request of my thead or the SPCC Program Administrator, upon terminating int, or transferring from one University department to another. W University Policies and Procedures and the Small Purchase of Procedure currently in effect over the SPCC. Int lost or stolen Small Purchase Charge Cards immediately to the & Investments office, ext #87396. If the vendor must have a Secure Socket Laver (SSL) Version 2.0
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tickets thro 3. I must retu departmen employme 4. I must folic Charge Ca 5. I must repo JMU Cash 6. I understar the interne or greatar. with https// I under The Commonwe be found here: F Employ U under recond	maintenance, and repairs, equipment and to purchase air/rail ugh the Internet if the vendor has a secure website. In the card to the Finance Office immediately upon request of my th tead or the SPCC Program Administrator, upon terminating int, or transferring from one University department to another. Wo University Policies and Procedures and the Small Purchase rd Procedure currently in effect over the SPCC. Int lost or stolen Small Purchase Charge Cards immediately to the & Investments office, ext #87396. If that in order to properly purchase goods and services through it, the vendor must have a Secure Sodet Layer (SSL) Version 2.0 To ensure the vendor has a SSL, the address window must start //. I will record the vendor's website address on the purchasing log. stand and agree to these terms. Leath of VA Corporate Purchasing Card Employee Agreement can Please review this agreement and print a copy for your records. read the Commonwealth of VA Corporate Purchasing Card yee Agreement terms. I understand and agree to these terms. stand PeopleSoft Finance access is required for SPCC lers.

You must read and agree to all terms and conditions and then hit the submit button.

Once you submit, you will receive a request confirmation. This lets you know your form has been submitted successfully.



Once your application has been approved by your supervisor and Finance, you will receive an email letting you know the application has been approved.



Manage Reconcilers

This form is to be used by any current SPCC cardholder who needs to add or delete employees to reconcile their monthly charges in the Bank of America WORKS system. The following fields will be automatically filled in based on your e-id and password:

Cardholder Name

The cardholder will fill out the last four digits of their card number and all other fields based on what they would like to do. If they want to add a reconciler, they will choose "add" and fill in the cardholder's e-id. If they want to delete a reconciler, they will choose "remove" and fill in the cardholder's e-id. Once complete, click the Submit button in the bottom left corner of the page.

rdholder's Name: Dameron, Joshua M	
4 Digits of SPCC: 9876	
Action: Add	÷ =
Reconcilers Name: BRITTANY SHERMAN	
Reconciler's Eid: SHERM2BM	
Action: Delete V	• =
Reconcilers Name: JESSE HORNEBER	
Reconciler's Eid: HORNEBJL	

Once you submit, you will receive a request confirmation. This lets you know your form has been submitted successfully.



Once your form has been approved by Finance, you will receive an email confirmation.

Mon 6/7/2021 5:01 PM auto_notifcation@jmu.edu SPCC Form Approved by Finance To Charge Accounts Payable Card Program Administrator The Small Purchase Charge Card form below has been approved by Finance: Form Number: 280 Form Type: Manage Reconcilers Initiator: Dickens,Caroline Michelle Date Submitted: 2021-06-07 Note to Initiator: Approve

Note: If the reconciler is a new user to the Bank of America WORKS system, they will receive a welcome email once the Manager Reconcilers form has been completed from Bank of America to setup their profile in Bank of America WORKS.

Cancel SPCC

This form is to be used by cardholders or their supervisors to cancel a current SPCC. Reasons to cancel a card include when an employee leaves employment with the university or changes departments. The following field will be automatically filled in based on your e-id and password:

Requestor's Name

The person filling out this form will need to fill in the following information:

Cardholder's Name Cardholder's Eid Cardholder's Last 4 Digits of SPCC

Once complete, click the Submit button in the bottom left corner of the page.

dholder or their Supervis	cancel your JMU Small Purchase Charge Car sor must complete and submit this form thems will be routed to Finance Cash & Investments	elves. Once the for processing.
SPCC will be cancelled 1.	upon receipt. Please destroy the card after su	bmitting this
Requestor's Name:	Dameron, Joshua M	
Cardholder's Name:	JOSHUA DAMERON	
Cardholder's Eid:	DAMEROJM	
Last 4 Digits of SPCC:	9876	
Submit Ca	ancel	

Once you submit, you will receive a request confirmation. This lets you know your form has been submitted successfully.

Request Confirm	ation
Your request h	as been submitted.
Form Number:	348
Submitted On:	06/15/2021 11:07:25AM

Once the form has been approved by Finance, you will receive an email to keep with your SPCC records.

الله Reply الله Reply All الله Forward الله Mon 6/7/2021 4:01 PM auto_notifcation@jmu.edu

SPCC Form Approved by Finance

To 🛛 Charge Accounts Payable Card Program Administrator

The Small Purchase Charge Card form below has been approved by Finance:

Form Number: 258 Form Type: Cancel SPCC Initiator: Eckert,Jan B Date Submitted: 2021-06-03

Monthly Credit Limit Increases

This form is to be used by cardholders to request increases to their overall monthly credit limit on their SPCC either temporarily or permanently. The following field will be automatically filled in based on your e-id and password:

Cardholder Name

The cardholder will need to fill in the following information:

<u>Cardholder's Last 4 Digits of SPCC</u> <u>Duration</u>: Permanent or Temporary. For temporary, you can put in a start and end date. <u>Request Limit</u>: This is the new limit you are requesting.

Once complete, click the Submit button in the bottom left corner of the page.

Permanent Request

omplete the form below to increase the monthly credit limit on your JMU Small Purc narge Card. The SPCC Cardholder must complete and submit this form themselves not the form is submitted, the application will be routed to your Supervisor for appro	have
	i
Cardholder's Name: Dameron, Joshua M Last 4 Digits of SPCC: 9876 Duration: Permanent V	
Request Limit: \$50,000.00 Submit Canoel	

SPCC CARDHOLDER TRAINING PEOPLESOFT ELECTRONIC FORMS-UPDATED 12/6/22

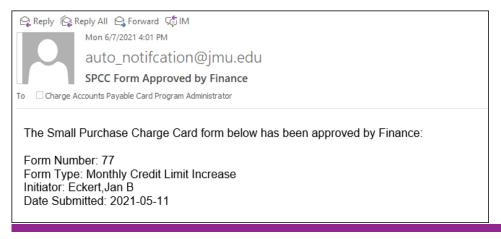
Temporary Request

Мо	onthly Credit Limit Increase
Ca	mplete the form below to increase the monthly credit limit on your JMU Small Purchase Charge rd. The SPCC Cardholder must complete and submit this form themselves. Once the form is bmitted, the form will be routed to your Supervisor for approval.
	Cardholder's Name: Griffith,Livia Saunders Last 4 Digits of SPCC: 1234
	Duration: Temporary ~
	Start Date: 06/15/2021 3
	End Date: 07/15/2021
	Requested Limit: \$15,000
	Submit Cancel

Once you submit, you will receive a request confirmation. This lets you know your form has been submitted successfully.

Request Confirma	ation
Your request ha	as been submitted.
Form Number:	349
Submitted On:	06/15/2021 11:10:03AM

Once the form has been approved by Finance, you will receive an email to keep with your SPCC records.



Single Transaction Increases

This form is to be used by cardholders to request increases to their single transaction credit limit on their SPCC either temporarily or permanently. Increases over \$10,000 must include a copy of the invoice and eVA EP/PCO or Procurement written approval. The following field will be automatically filled in based on your e-id and password:

Cardholder Name

The cardholder will need to fill in the following information:

Cardholder's Last 4 Digits of SPCC End Date: This is the date the increase will expire. Request Single Transaction Limit: This is the limit you are requesting. eVA EP/PCO Number or Exclusion: You must enter an eVA order number or an appropriate exclusion. If you are entering an exclusion, you must attach written permission from the Procurement office before your limit will be increased. <u>Comment</u>: Use this section to let Cash and Investments know any additional information on the request. *NOTE: Once you submit the request, you will need to attach a copy of the invoice and any other important documentation related to the request.

Once complete, click the Submit button in the bottom left corner of the page.

Single Transaction Increase
Complete the form below to increase the single transaction limit on your JMU Small Purchase Charge Card. The SPCC Cardholder must complete and submit this form themselves. After clicking Submit, you will have the option to attach supporting documentation. When submitted, the form will be routed to your Supervisor for approval.
Cardholder's Name: Griffith,Livia Saunders
Last 4 Digits of SPCC: 1234
End Date: 06/30/2021
Requested Single Transaction Limit: \$15,000.00
eVA EP/PCO Number or Exclusion: EP3340176 note: exclusions require supporting documentation be attached.
Cardholder's Comments: Pay Daniel's invoice over \$10,000, EP3340176.
After clicking submit, you will have the option to attach supporting documentation.
Submit Cancel

Once you click the Submit button, you will then be requested to add attachments. This would include copies of the invoices or any other relevant documentation. Click the Add Attachments button.

Request Confirmation
Your request has been submitted.
Form Number: 350
Submitted On: 06/15/2021 11:19:15AM
Click the Add Attachments button below to add supporting documentation to your request.
After adding attachments and clicking the Return button on the SPCC Attachments Page, your attachments will be saved to the request and you will be returned to this page. You can then navigate away from this page.
Add Attachments

Γ

Attachments Personalize Find 💷 👪 First 🕚 1 of 1 🕑 L			rst 🕚 1 of 1 🕑 Las
Attachment	Description	Last Update Date/Time	Last Update User ID View
			Viev

You will browse your computer to find the location of the documentation.

File Attachment	×
Browse No file selected.	
Upload Cancel	

Once you find your document, you will add it, and hit the Upload button.

	File Attachment	×
	Browse Daniels Invoice.pdf	
	Upload Cancel	
1		.::

You will be prompted to add a description to your document (you do not have to add a description).

Message	
Would you like to add a description for Daniels_Invoice.pdf?	

If you choose YES, you can add up to a 30-character description, then click the OK button

	×
Add Description	
(30 character limit.)	
OK Cancel	
	<u></u>

Your attachment will now appear on the SPCC Attachments Page. If it is correct, you can click the Return button. If you'd like to add more, you can click the Add Attachment button again, or you can delete the attachment.

Atta	achments		Personalize Find 💷 🚦	📕 🛛 First 🕚	1 of 1	🕑 Las
ļ	Attachment	Description	Last Update Date/Time	Last Update User ID	View	Delete
1 [Daniels_Invoice.pdf	Copy of Invoice for Daniels	06/15/21 11:30:31AM	GRIFFILS	View	
	Add Attachment Delete Attac	chment		1		

When you click the Return button, you will be taken back to the Request Confirmation page. This shows your request has been submitted.

Req	uest Confirmation
	Your request has been submitted.
	Form Number: 350
	Submitted On: 06/15/2021 11:19:15AM
	Click the Add Attachments button below to add supporting documentation to your request.
	After adding attachments and clicking the Return button on the SPCC Attachments Page, your attachments will be saved to the request and you will be returned to this page. You can then navigate away from this page.
	Add Attachments

Once the form has been approved by Finance, you will receive an email to keep with your SPCC records.

Reply Reply All Reply All Reply Forward R IM Mon 6/7/2021 4:01 PM auto_notifcation@jmu.edu SPCC Form Approved by Finance

To 🗌 Charge Accounts Payable Card Program Administrator

The Small Purchase Charge Card form below has been approved by Finance:

Form Number: 188 Form Type: Single Transaction Increase Initiator: Eckert,Jan B Date Submitted: 2021-05-25

Exception Request

This form is used by cardholders to request any exception for a Merchant Category Code (MCC) restriction on the SPCC. The following field will be automatically filled in based on your e-id and password:

Cardholder Name

The cardholder will need to fill in the following information:

<u>Cardholder's Last 4 Digits of SPCC</u> <u>Duration</u>: Permanent or Temporary, for temporary, you will put in a start and end date. <u>Exception Type</u>: This is the MCC Code you want lifted on the card. <u>Justification</u>: Use this section to let Cash and Investments know any additional information on the request. You must have something in this field for approval.

Once complete, click the submit button in the bottom left corner of the page.

Temporary Request

equest an exception on your JMU Small Purchase Charge Card. The olete and submit this form themselves. After clicking Submit, you will orting documentation. Once the form is submitted, the form will be approval.
Griffith,Livia Saunders
1234
Temporary 🗸
06/15/2021
06/30/2021
Restaurant v
To purchase pizza for year end meeting
Б. Б.
Annual meeting with all student employees and faculty/staff to go over 🛛 📽
accomplishments and make goals for next academic year
After clicking submit, you will have the option to attach supporting documentation.
Submit Cancel

Permanent Request

Exception Request
Complete the form below to request an exception on your JMU Small Purchase Charge Card. The SPCC Cardholder must complete and submit this form themselves. After clicking Submit, you will have the option to attach supporting documentation. Once the form is submitted, the form will be routed to your Supervisor for approval.
Cardholder's Name: Griffith,Livia Saunders
Last 4 Digits of SPCC: 1234 Duration: Permanent ~ Exception Type: Restaurant ~
Justification: To purchase pizza student related activities
Cardholder's Comments:
After clicking submit, you will have the option to attach supporting documentation.

Once you click the Submit button, you will then be requested to add attachments. This would include copies of the invoices or any other relevant documentation. Click the Add Attachments button.

Request Confirmation
Your request has been submitted.
Form Number: 351
Submitted On: 06/15/2021 11:40:21AM
Click the Add Attachments button below to add supporting documentation to your request.
After adding attachments and clicking the Return button on the SPCC Attachments Page, your attachments will be saved to the request and you will be returned to this page. You can then navigate away from this page.
Add Attachments

*The adding an attachment process is the same as for single transaction limit requests. See page 13 for detailed instructions. The request confirmation page shows your request has been submitted.

Once the form has been approved by Finance, you will receive an email to keep with your SPCC records.

To Charge A	Mon 6/7/2021 4:00 PM auto_notifcation@jmu.edu SPCC Form Approved by Finance ccounts Payable Card Program Administrator
Form Num Form Type Initiator: E	Purchase Charge Card form below has been approved by Finance: ber: 264 e: Exception Request ckert,Jan B nitted: 2021-06-03

Request Confirmation

Your request has been submitted.

Form Number: 352

Submitted On: 06/15/2021 11:49:23AM

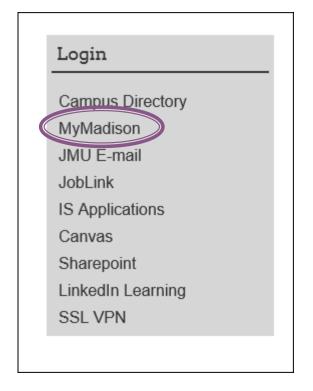
Approvals

My Madison Approvals

When a form has been submitted, supervisors will receive an email letting them know they have a form to approve.

From: auto_notifcation@jmu.edu <auto_notifcation@jmu.edu> Sent: Thursday, July 1, 2021 1:00 PM To: Charge Accounts Payable Card Program Administrator <appa@jmu.edu>; Charge Accounts Payable Card Program Administrator <appa@jmu.edu> Subject: SPCC Form Awaiting Your Approval The Small Purchase Charge Card form below has been electronically submitted and is awaiting your approval: Form Number: 406 Form Type: SPCC Application Initiator: Dickens, Caroline Michelle Date Submitted: 2021-07-01 Please log into MyMadison to approve/deny the form.

Supervisors will be able to approve all SPCC forms within MyMadison Approvals. MyMadison can be reached from the Faculty/Staff Main home page at: <u>https://www.jmu.edu/gateway/faculty-staff.shtml</u> On the left-hand side, there is a gray shaded box, and MyMadison is listed in that box.



You will use your e-id and password to log in. System access does require Duo authentication.

	James Madison University Login Page
	Help Accessibility Logout
TO SON UNITED SON UNI	JMU eID: Password: Continue Forgot your password?

From the My Approvals tab in MyMadison, the supervisor will see how many SPCC forms are in their pending approvals, under Finance. Click on the blue hyper link *SPCC Forms* to be taken to the My Approvals-Finance.

JAMES	MADISO	N UNIV	/ERSIT	Υ.					
MyMadison	Employee	Faculty	Advisor	MyAccounts	MyServices	MyApprovals			
Main Menu v									
Pardon C	Our Dust								
the user inte	rface up to m	odern stan	dards and	make it more ef	ficient and intuit	ive. These im	orove	g a common experience regardless of device for all constituents. These cl ments will be rolled out in multiple phases. To support this, Mobile MyMad tts and Employees soon.	_
Number of P	nt Adminis ending Approvals e/Waiver Request	:	SA)			Q		nan Resources (HCM) not have access to HCM approvals.	0 .
Finance Number of Pi 7 - SPC	ending Approvals					••			

J	AMES	MADISC	ON UNIV	ÆRSIT	Y						
	Madison	Employee	Faculty	Advisor	MyAccounts	MyServices	M	yApprovals			
Mair	n Menu 👻										
M	y Approv	vals - Finar	nce								
									S		irst 🕚 1-7 of 7 🕑 Last
	00005		(ID		Initiator Name	Action		View Application	View Routing	View Attachments	View/Add Comments
	Form Num Cardholder Last 4 Digi Action: Add Departmen	r's Name: Charle ts of SPCC: 3424	es Cook 4		Cook,Charles Christopher		~		View Routing		View/Add Comments
	Form Num Applicant's Date Subm Default Dep Transaction Monthly Lin	n — <u>SPCC Applic</u> ber: 347 Name: Livia Gri iitted: 06/15/202 ptid #: 100727 n Limit: \$10,000. nit: \$10,000.00 (s) Name(s): Ba	ffith 1 00	irtjd@jmu.edu	Griffith,Livia Saund	ers	~	View Application	View Routing		View/Add Comments
	Form Num Cardholder Last 4 Digi Duration: T Start Date: End Date: (Requested	r's Name: Livia 0 ts of SPCC: 1234 emporary 06/15/2021	Griffith 4	<u>150</u>	Griffith,Livia Saund	ers	~		View Routing		View/Add Comments
	Form Num Cardholder Last 4 Digi End Date: (Requested eVA EP/PC Cardholder \$10,000, E	r's Name: Livia C ts of SPCC: 123- 06/30/2021 I Single Transac O Number or Exi r's Comments: F	Griffith 4 tion Limit: \$15, clusion: EP334 'ay Daniel's inv	000.00 40176	Griffith,Livia Saund	ərs	~		View Routing	View Attachments	View/Add Comments
	Form Num Cardholdei Last 4 Digi Duration: T Start Date: End Date: (Exception 1 Justification Cardholdei student em accomplish year	r's Name: Livia 0 ts of SPCC: 1234 emporary 06/15/2021	Sriffith 4 izza for year er nnual meeting ulty/staff to go ke goals for ne	with all over	Griffith,Livia Saund	ers	~		View Routing	View Attachments	View/Add Comments

From the My Approvals Tab, the approver can do the following:

View Application - on any SPCC Application, the approver can view the form by clicking the View Application button.

	SPCC Form – SPCC Application Form Number: 347 Applicant's Name: Livia Griffith Date Submitted: 06/15/2021 Default Deptid #: 100727 Transaction Limit: \$10,000.00 Monthy Limit: \$10,000.00 Reconciler(s) Name(s): Barb, Jennifer: hartjd@jmu.edu	Griffith,Livia Saunders		View Application	View Routing		View/Add Comments
--	--	-------------------------	--	------------------	--------------	--	-------------------

The application will come up for the approver to review. Once reviewed, click the Cancel button at the bottom of the application to return to the approvals page.

Monthly Limit:	\$10,000.00
econciler(s) for Card:	Jennifer Barb, hartjd
	Include the First / Last Name and Eid of all reconciler(s) to be added to the card, separated by a comma. If the ability is needed to reconcile your own card, your name must be included here.
Submit Date:	07/07/2021 11:33:08AM
	MALL PURCHASE CHARGE CARD (SPCC) IN MY NAME TO USE RTMENTAL PURCHASES. I UNDERSTAND THAT:
purchases via th	nsible for all expenses charged to the card by me. Unauthorized the Purchase Credit Card may result in loss of the card. I accept full any unauthorized personal purchases made with the SPCC.
maintenance, ar	the card to purchase goods, supplies, and services for operations, nd repairs, equipment and to purchase air/rail tickets through the ndor has a secure website.
department hea	e card to the Finance Office immediately upon request of my d or the SPCC Program Administrator, upon terminating transferring from one University department to another.
	iversity Policies and Procedures and the Small Purchase Charge currently in effect over the SPCC.
	t or stolen Small Purchase Charge Cards immediately to the JMU ents office, ext #87396.
internet, the ven To ensure the ve	t in order to properly purchase goods and services through the dor must have a Secure Socket Layer (SSL) Version 2.0 or greater endor has a SSL, the address window must start with https://. I will or's website address on the purchasing log.
☑ I understand	and agree to these terms.
	f VA Corporate Purchasing Card Employee Agreement can be view this agreement and print a copy for your records.
	he Commonwealth of VA Corporate Purchasing Card Employee erms. I understand and agree to these terms.
☑ I understand	PeopleSoft Finance access is required for SPCC reconcilers.
	that once my application is processed, I will be granted access ft Finance to perform card maintenance functions.
to PeopleSo	tt Finance to perform card maintenance functions.

View Routing - this will show the approver the routing of the form. To view, click on the View Routing button.

SPCC Form – Monthly Credit Limit Increase Form Number: 349 Cardholder's Name: Livia Griffith Last 4 Digits of SPCC: 1234 Duration: Temporary Start Date: 06/15/2021 End Date: 07/15/2021 Requested Limit: \$15,000.00	Griffith,Livia Saunders	~	View Routing	View/Add Comments
Date Submitted: 06/15/2021				

The forms approval routing will come up; once the approver has reviewed, they can click the Return button to go back to the My Approvals-Finance page.

	Vorkcenter			
	oval Path 349: MINC:Pen	ding		
M	onthly Credit Limit Increas	e		
	Multiple Approvers SPCC Supervisors		Not Routed Multiple Approvers Finance Cash & Investments	
Retur	n			

View Attachments - if a form has an attachment, the approver can view that attachment by clicking the View Attachments button.



This will take the approver to the SPCC Attachments page. Click on the View button to pull up an image of the attachment. **Note you may need to enable pop-ups to see the attachment** After viewing the attachment, the approver would click the Return button to go back to the My Approvals-Finance Page.

Attachments		Pers	onalize Find 💷 🔣 👘 I	First 🕚 1 of 1 🕑 La		
Attach	nment	Description	Last Update Date/Time	Last Update User ID	Vie	
1 Danie	ls_Invoice.pdf	Copy of Invoice for Daniels	6 06/15/21 11:30:31AM	GRIFFILS	Vie	

View/Add Comments - if any comments have been made about a submitted form, the approver could view them there as well as make comments.



If the approver would like to make a comment here, they can do so by selecting the Add Comment button.

			Personali	ze Find 💷 醌 👘 First 🕚 1 of	1 🕑 Lasi
Form	п Туре	Last Update User ID	Comment	Last Update Date/Time	
1					
		ng this form			
		Add Comment		.::	

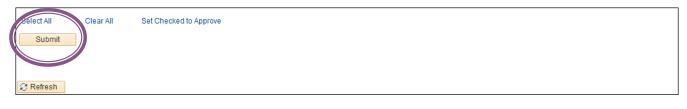
Once the approver adds the comment, you will see it added on the SPCC Workcenter comments. If complete, click the Return button to go back to the My Approvals-Finance page.

S	PCC Work	center Comme	ents	
			Personalize Find 🔄	🛛 📕 👘 First 🕚 1 of 1 🕑 Last
	Form Type	Last Update User ID	Comment	Last Update Date/Time
1	Exception	KOLVOORA	Approving this form	06/15/21 1:31:24.000000PM
		Add Comment		
R	eturn			

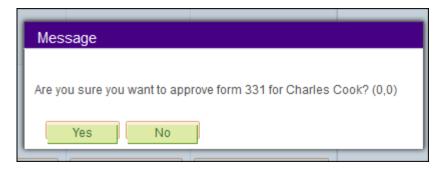
Once an approver has reviewed all documentation, they will either approve or deny the form. To do this, they will choose, under Action, either Approve or Deny. Make sure the check box on the far left is checked for the row you are working on.

My Approvals - Finance						
				Personalize	Find 🖓 🔢 👘 Fi	rst 🕚 1-7 of 7 🕑 Last
	Initiator Name	Action	View Application	View Routing	View Attachments	View/Add Comments
SPCC Form - Manage Department IDS Form Number: 331 Or dholder's Name: Charles Cook ∠ La t 4 Digits of SPCC: 3424 Mon: Add Department ID: ACADF2 Date Submitted: 06/10/2021	Cook,Charles Christopher	Approved		View Routing		View/Add Comments
SPCC Form – SPCC Application Form Number: 347		Denied				

Once the correct status has been entered and the box on the left is checked, the approver will scroll to the bottom of the page and click the Submit button on the lower left corner.



A message will pop up confirming the approver's action. If correct, click the Yes button. If incorrect, click the No button.



Once the approver has approved the form, it will be sent to Finance for final approval.

If the form is denied by the approver, the form will be rejected, and the cardholder would need to submit again if the request is still needed.

When an approver denies a form, they will be required to add a denial reason that will be sent back to the cardholder or initiator. Once complete, the approver will click the OK button.



If the approver has several forms to approve and wants to approve them all at once, they would click the Select All hyperlink and the Set Checked to Approve hyperlink at the bottom of the page. This will set all lines to approve at once when the Submit button is clicked.

					Personalize	Find 🖓 🔢 🛛 Fi	rst 🕙 1-5 of 5 🕑 Last
		Initiator Name	Action	View Application	View Routing	View Attachments	View/Add Comments
Form Applic Date S Defau Trans Month	Form – SPCC Application Number: 347 ant's Name: Livia Griffith Submitted: 06/15/2021 It Deptid #. 100727 action Limit: \$10,000.00 Iy Limit: \$10,000.00 cicler(s) Name(s): Barb, Jennifer: hartjd@jmu.edu	Griffith,Livia Saunders	Approved 🗸	View Application	View Routing		View/Add Comments
Form Cardh Last 4 End D Reque eVA El Cardh \$10,00	Form – Single Transaction Increase Number: 350 Older's Name: Livia Griffith Digits of SPCC: 1234 ate: 06/30/2021 seted Single Transaction Limit: \$15,000.00 P/PCO Number or Exclusion: EP3340176 older's Comments: Pay Daniel's invoice over 00, EP3340176. Submitted: 06/15/2021	Griffith,Livia Saunders	Approved ~		View Routing	View Attachments	View/Add Comments
Form Cardh Last 4 Durati Start D End D Excep Justifi Cardh stude accon year	Form – Exception Request Number: 351 Older's Name: Livia Griffith Digits of SPCC: 1234 on: Temporary Date: 06/15/2021 ate: 06/30/2021 tion Type: Restaurant cation: To purchase pizza for year end meeting older's Comments: Annual meeting with all ne employees and faculty/staff to go over nplishments and make goals for next academic Submitted: 06/15/2021	Griffith,Livia Saunders	Approved ~		View Routing	View Attachments	View/Add Comments
Form Cardh Last 4 Action Depar	Form – Manage Department IDs Number: 352 Iolder's Name: Livia Griffith Digits of SPCC: 1234 : Add tment ID: 100709 Submitted: 06/15/2021	Griffith,Livia Saunders	Approved ~		View Routing		View/Add Comments
Form Cardh Last 4 Action Depar	Form – Manage Department IDs Number: 352 Iolder's Name: Livia Griffith Digits of SPCC: 1234 : Add tment ID: 539433 Submitted: 06/15/2021	Griffith,Livia Saunders	Approved 🗸		View Routing		View/Add Comments

A pop up message will appear for each form confirming you want to approve all the forms (the number of forms you are approving will appear in the box). If everything is correct, the approver would click the Yes button.

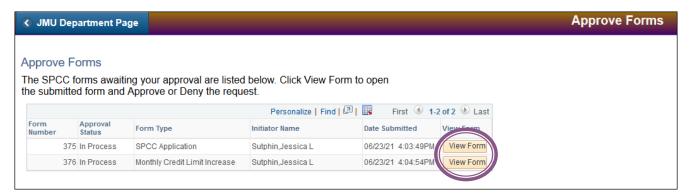
	Message	1
) (Are you sure you want to approve 4 forms? (0,0) Yes No	

PeopleSoft Finance Approvals

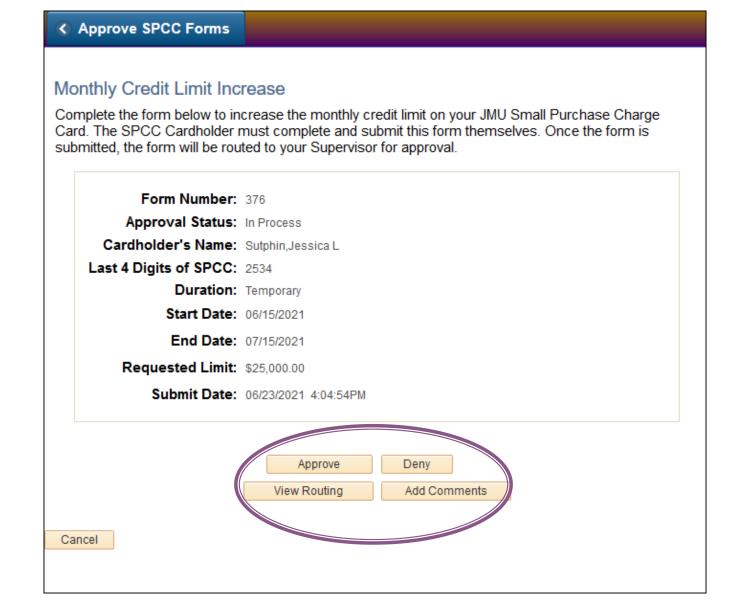
Supervisors who have access to PeopleSoft Finance can also approve forms through PeopleSoft Finance JMU Workflow. Under the Navigator > JMU Applications > JMU Workflow > SPCC > Approve Forms

•• • •						
NavBar: Navigator						
	SPCC					
Recent Places	Initiate Forms	>				
+	Approve Forms					
My Favorites						
Navigator						

The Approve Forms Page will come up.



On each form, click the View Form button in order to view and approve.



After reviewing the form, you can choose to approve or deny the form depending on your decision. You can also view the routing and add comments for the cardholder and Finance.

Approve

You will choose the Approve button. A pop-up box will come up to confirm you want to approve the form. If you choose yes, the form will be approved and moved to the next routing approval.



Deny

You will choose the Deny button. A pop-up box will come up to confirm you want to deny the form. If you choose yes, an additional box will come up requiring you to put in a reason for denial. You must type a reason and hit the OK button.

Message	
Are you sure you want to deny this form? (0,0)	
Yes No	

Diana anta yang balaw far danving the namos ti Vayang ang will be and to the form britister					
Please enter your reason below for denying the request. Your response will be sent to the form Initiator.					
(Required)					
Reconcerned Penial: Increase not needed at this time.					
OK Cancel					

Contact Information

Cash & Investments: <u>appa@jmu.edu</u> (Departmental mailbox monitored during business hours)

SPCC Program Administrators:

Jennifer Hart Barb	568-7396	<u>hartjd@jmu.edu</u>
Racheal Estep	568-6771	<u>esteprm@jmu.edu</u>
Kristin Johnston	568-8061	john32km@jmu.edu
Tish Leeth	568-3205	<u>leethtc@jmu.edu</u>