How to Approve a PaySource Funding Request

STEP 1: You will receive an email from **Accounting and Financial Services** indicating you have been assigned a task.

From:	Accounting and Financial Services <sharepointadmin@samford.edu>
To:	Kersey, Casey Jo
Cc:	
Subject:	Tasks - PaySource Card Funding Approval Process

Good day - You have been assigned a task to authorize funds transfer to a Samford University PaySource debit card.

STEP 2: Click on the link in the email provided (at the very bottom of the email) to access the SharePoint site.

3. Go to this link, and complete your task, approving or rejecting the request as you see fit.

STEP 3: View the Item. You can do this in several ways: (A) You can click the blue hyperlink, (B) You can click on the down arrow at the end of the name of the task, or (C) You can click the "View Item" icon at the top of the screen.

STEP 4: Once you click "View Item" by one of the means listed above, another dialogue box will appear on your screen. You can click the name of the task (see red circle below) and a copy of the request will appear in Microsoft InfoPath (see next page for image).
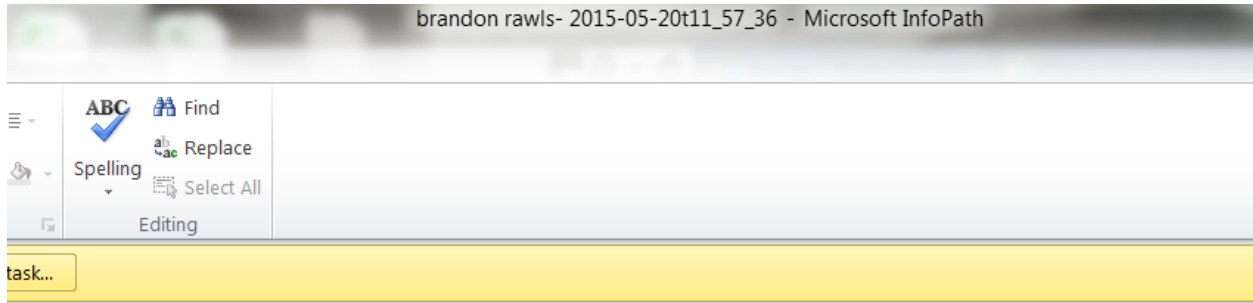
Workflow Task

✕ Delete Item

✔ This workflow task applies to Brandon Rawls- 2015-05-20T11_57_36.

Status	Not Started
Requested By	Kersey, Casey Jo ;
Consolidated Comments	Approver1ApprovalProcess started by Kersey, Casey Jo on 5/20/2015 11:57 AM Comment: Please examine thePaySource Card Funding Approval Process Form These are the comments of the requestor and all previous participants.
Due Date	5/27/2015
Comments	
	This message will be included in your response.

[Approve] [Reject] [Cancel] [Reassign Task]

Microsoft InfoPath Document:

ABC Spelling

Find
Replace
Select All

Editing

task...

Request for PaySource Card Funding

SAMFORD
U N I V E R S I T Y

ALL FIELDS MARKED RED ARE MANDATORY

Requestor Name	Kersey, Casey Jo
Requestor Contact Phone	2634
Cardholder Name	Brandon Rawls
Cardholder SUid (Nine Number)	900184319
Does the cardholder have an existing PaySource card?	◉ YES ○ NO Last 4 digits of currently issued card: 9999
Is this for team travel?	○ YES ◉ NO
Will this card be used for international travel?	○ YES ◉ NO
Relationship to Samford	◉ EMPLOYEE ○ STUDENT ○ OTHER
Trip / Purpose / Description	TEST TEST
Date(s)	05/20/15 TO 05/20/15
Date Card Needed [1]	05/20/15
Amount Requested	1000.00

STEP 5: To approve the request you can either click "Open this task…" above the request or close out of Microsoft InfoPath and go back to the screen above. The approval screens looks similar either way.

STEP 6: Add your comments in the Comments box and click "Approve".

STEP 7: Verify the item no longer appears in your task list
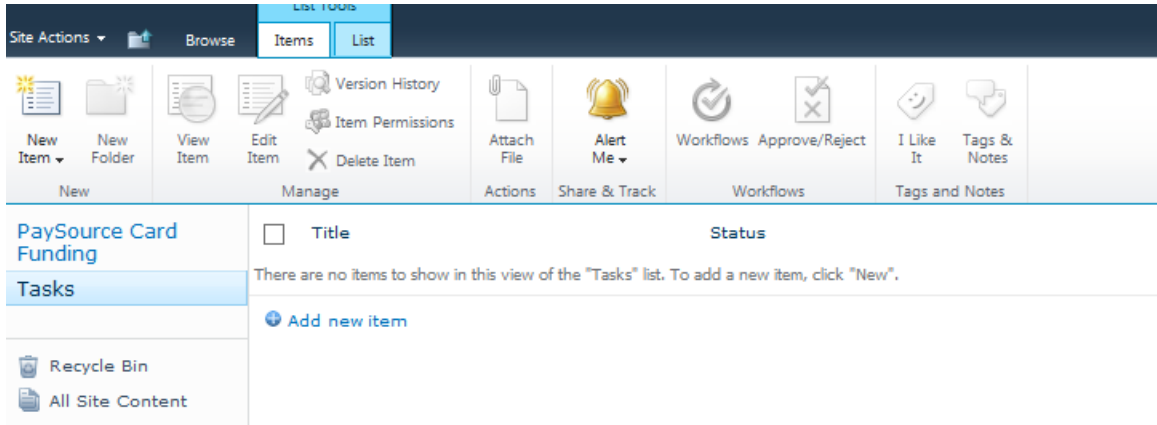
NOTE: The request is routed to each person listed as an approver (up to 3 people) and then to Accounting once the request has been completed.