Reference the computer-based training on Learn@ISU ‘Procurement Card Transaction Verification for Campus Organizations’ (WKC-TRN-FIN-PCARDCO-ON) for more information!

1. Receive Notification of New Procurement Card Transaction (Cardholder)
   1. The cardholder will receive a Workday inbox item as each transaction is transmitted to Workday, access this by:
      a. Selecting the inbox icon at the top-right corner of the landing page
      b. Selecting the ‘Go to Inbox’ button on the left-hand side of the landing page

2. Once within your inbox, select the item labeled ‘Procurement Card Transaction Verification’ to begin verifying the transaction
   a. Toggle to a larger view by selecting the arrows icon
2. Verify Procurement Card Transaction (Cardholder)

1. The ‘Review Procurement Card Transaction Verification’ screen contains three tabs:
   a. The **Information** tab contains summary details for the verification, this does not require action
   b. The **Attachments** tab can be used to upload receipts and supporting documentation, although this may also occur within the **Transaction Details** tab
   c. The **Transaction Details** tab is where information is entered to verify the transaction

2. Enter information to verify the transaction in the **Transaction Details** tab:
   a. Information in the top half of the screen populates based on the transaction
   b. The bottom half of the screen is where additional details are entered to verify the transaction
3. Scroll to the bottom of the screen to enter the following required fields:
   a. **Line Item Description**: This is a brief description of the purchase (e.g., Pizza)
   b. **Spend Category**: This will always be **SC10863 Campus Org Review**.
      Search by typing ‘Campus Org Review’ or ‘SC10863’ in that field and pressing enter
      i. The Campus Organization Accounting Office will change the Spend Category as they review
   c. **Memo**: This is where the purpose is entered (e.g., Pizza for monthly Campus Christian Fellowship)

   ![Image of transaction details]

   d. **Program**: Search for the **Program Worktag** associated with your campus organization. You can search using the ID number (PG#####) or description.
      *Scroll to the right to locate this field*
      i. Each campus org is assigned a Program Worktag

   ![Image of transaction details with program and gift fields]
4. Scroll to the bottom of the screen to upload attachments

5. Once all required information is entered, select **Approve** at the bottom of the screen

6. A details and process screen will appear and show who is up next
   a. The verified transaction will first route to the **Student Org Treasurer**
   b. It will then route to the **Student Org Advisor** and to the **Campus Organizations Accounting Office**
3. Approve the Verification Transaction (Student Org Treasurer/Student Org Advisor)
   1. The Student Organization Treasurer and then the Student Organization Advisor will receive a Workday inbox as the verification is submitted by the cardholder and routes through the approval chain. Navigate to the transaction by:
      a. Selecting the inbox icon at the top-right corner of the landing page
      b. Selecting the ‘Go to Inbox’ button on the left-hand side of the landing page

2. Once within your inbox, select the item labeled ‘Procurement Card Transaction Verification’ to begin verifying the transaction
   a. Toggle to a larger view by selecting the arrows icon
3. Review the details of the transaction by scrolling through the screen.

4. Once reviewed, select **Approve** or **Send Back**
   a. **Approve** will route the verification to whoever is next in line.
   b. When selecting **Send Back**, an additional window will appear where you may choose who to send the verification back to. You also need to enter a reason.

5. Enter comments, as needed, at the bottom of the screen for other reviewers to see.