Financial Administration is pleased to announce that the automated Purchasing Card Application and End User Agreement is now in production at
<http://www.uwsa.edu/fadmin/Purchasing%20Cards.htm>

The automation of this application process was just one of the suggested Purchasing Card efficiencies of the PCard Lean Project.  Automating the   application and user agreement processes decreases processing time, cardholder wait time, utilizes electronic approvals & signatures, and increases security of University data.

The application has been customized according to specific campus operational requirements which include:

* Type of card applicants can apply for (i.e. supplies, supplies & travel, travel only)
* Campus overall bi-weekly and single transaction spending limits
* Default account codes
* Approval steps

How this works:

Purchasing Card applicants log in to the application with Employee ID and last name.

* Applicants are asked what type of card they want to apply for(campus specific).
* Applicant is asked to provide desired Organizational Name (i.e. Summer Programs) for card imprint and default coding, if known.
* Applicant is asked for desired bi-weekly and single transaction limit - if either are over the campus standard, applicant is forced to give explanation for higher limit
* Applicant is asked to provide business reason for card application
* Applicants are presented with user agreement and prompted to agree to policy and card usage terms - must agree to advance process.
* Applicants must enter supervisor name and email to route application for approval.
* Application process records applicants electronic "signature" and date stamps application.
* Supervisor is sent email notification (with link to application) informing that application requires review and approval.  Supervisor can approve or deny.  If denied, supervisor must list reason and applicant receives email notification and explanation of denial.
* For campuses that use Division level approval, supervisor is prompted to complete default coding structure and route to "Approving Authority" by entering name and email address.
* Application process records supervisor electronic signature and date stamps application.Approving Authority (Division level) follows same approval/denial process as supervisor but application/user agreement auto-routes to campus Program Administrator.
* Application process records Approving Authority electronic signature and date stamps application.
* Program Administrator receives email that application is pending.
* Program Administrator approves or denies application.  If application is denied, applicant and approvers are notified by email with reason.  If approved, PA prints out completed, approved, and electronically signed application and end user agreement form (as a pdf document) for review and entry into Access Online for card setup.
* Applicant receives email notification that application is approved.

What the application cannot do:

* Save application data - this is "one off", users must complete the short application process from beginning to end.
* Store application data - the automated application is a database but application data is not saved
* Alert user to inappropriately routed application -  Users must enter valid University email extensions for all routing and if they don't, they are prompted to correct.  If user enters an incorrect name but valid University email extension the application would be considered a runaway (i.e. unrouted).  For this exception, the database is monitored for such and if  discovered, the campus Program Administrator will be notified to follow up and have the user resubmit.
* Handle Corporate Travel Card applications/user agreements.  This is the 2nd phase and campuses will be notified when ready for testing/implementation.