



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Approve Credit
Card Import

DATE DEVELOPED: 11/11/2021

REVISED DATE:

SUBJECT: Travel Card Approval

Approve Credit Card Import

On the dashboard click on the Workflow Approvers tab

The screenshot shows the dashboard interface. At the top, there are two tabs: "My Entry Points" and "Workflow Approvers", with the latter being selected and highlighted with a red box. Below the tabs, there are three main sections: "Workflows", "Approvals Menu", and "Travel Requests". The "Workflows" section contains a warning icon and the text "You have pending approvals" followed by a list item "Credit Card Transaction Import (1)" which is highlighted with a red box. The "Approvals Menu" section lists various approval tasks such as "Approve Journal Entry", "Approve Budget Change Requests", etc. The "Travel Requests" section shows a table with columns for Traveler, Activity/Purpose, Event, Event Number, City, Request ID, State, Created Date, Departure Date, Return Date, Total Amount, Requestor, and Details. The table currently shows 0 records.

Click on Credit Card Transaction Import

This screenshot is identical to the previous one, but the "Credit Card Transaction Import (1)" item in the Workflows section is now highlighted with a red box, indicating it has been selected.



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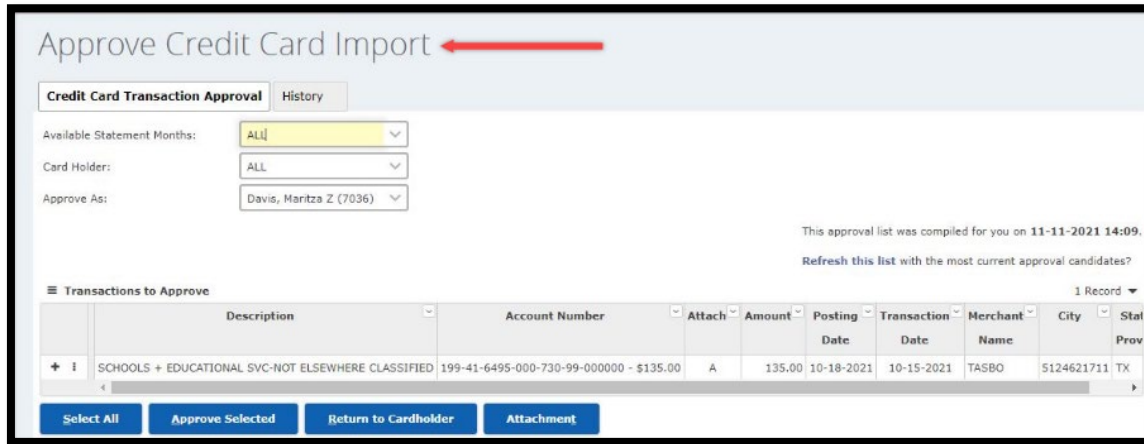
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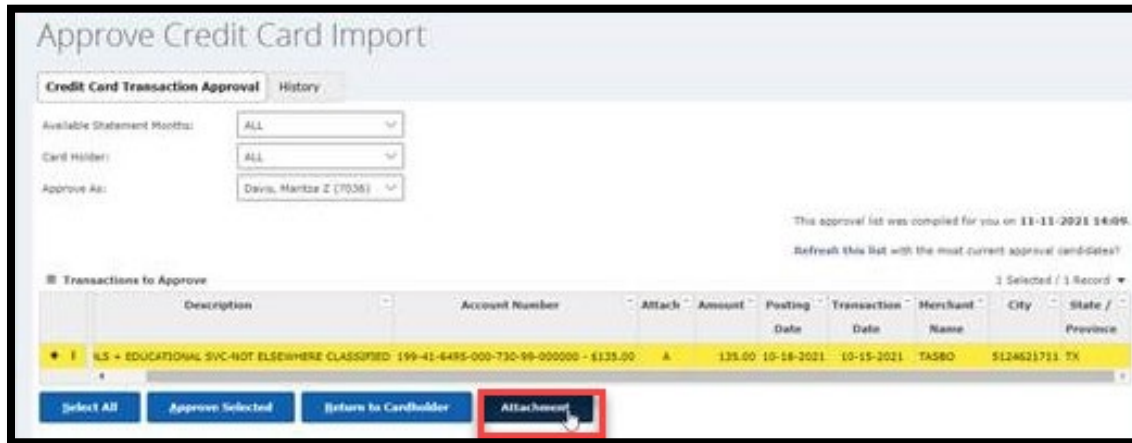
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You will see Approve Credit Card Import screen



To view the transactions attachment:

- Highlight the line
- Click Attachment





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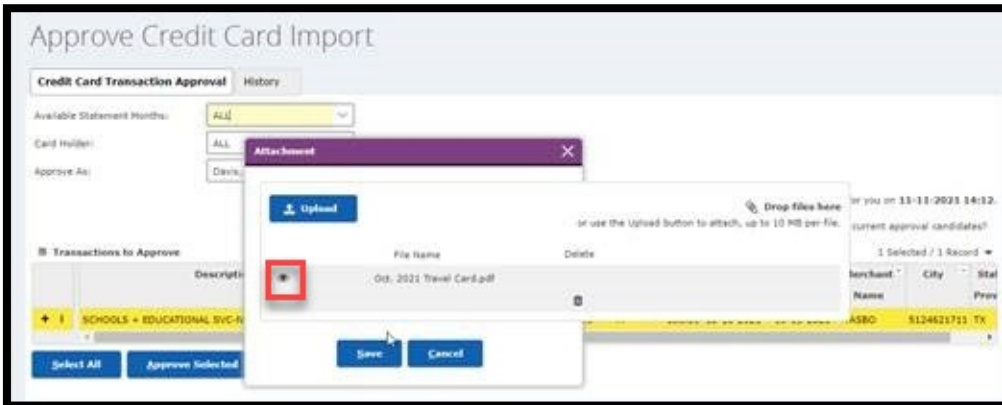
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You will see the Attached Pop-up

- Click on the eye icon



To approve the transaction(s)

- Highlight Line(s)
- Click Approve Selected

