



UNIVERSITY OF  
**SOUTH CAROLINA**

---

# PeopleSoft Team Card Approver Training

---

Mike Staton

April 2018



# PeopleSoft Team Card

---

- Today's Agenda
  - What is PeopleSoft Team Card?
  - Team Card Approval Overview
  - Approving from email or worklist
  - Sending back an expense report
  - Using the approve transactions page



# PeopleSoft Team Card

---

- What is PeopleSoft Team Card?
  - A new process for automatically interfacing all Team card transactions directly into PeopleSoft, allocating these transactions to the appropriate accounting, reconciling the transactions to receipts, and electronically approving the transactions in the PeopleSoft Expenses module.



# PeopleSoft Team Card

---

- Approval Overview
  - The Expense Report represents the Card statement
  - Each expense report is routed to the “department head” responsible for approving card statements
  - We are configuring the “department head” to be the same approver currently signing the statement
  - The “department head” is responsible for approving the expense report and verifying it represents the statement, has attached receipts and backup, and is allocated to the correct accounting distribution.



# PeopleSoft Team Card

---

- Approving from an Email or Worklist
  - Email and Worklist; an explanation
  - Review the Cardholder Name
  - Business Purpose and Description
  - Attachments, Receipts and Statement
  - Expense Details and Related Content
  - My Wallet Details and Enhanced Data
  - Approval, Send Back, and Hold



# PeopleSoft Team Card

---

- Approving from the “Approve Transactions”
  - Navigation
  - Displays all transactions pending your approval
  - Review each transaction
  - Approve from the approval page or the summary page



UNIVERSITY OF  
**SOUTH CAROLINA**

---

# PeopleSoft Team Card Approver Training

---

April 2018