

# 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.

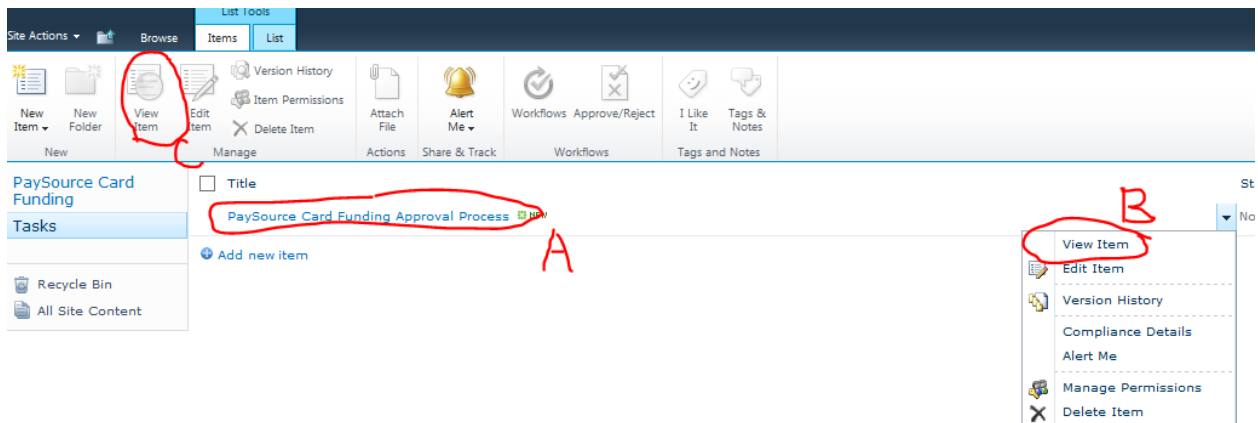
From: Accounting and Financial Services <sharepointadmin@samford.edu>  
To: Kersey, Casey Jo  
Cc:  
Subject: Tasks - PaySource Card Funding Approval Process

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

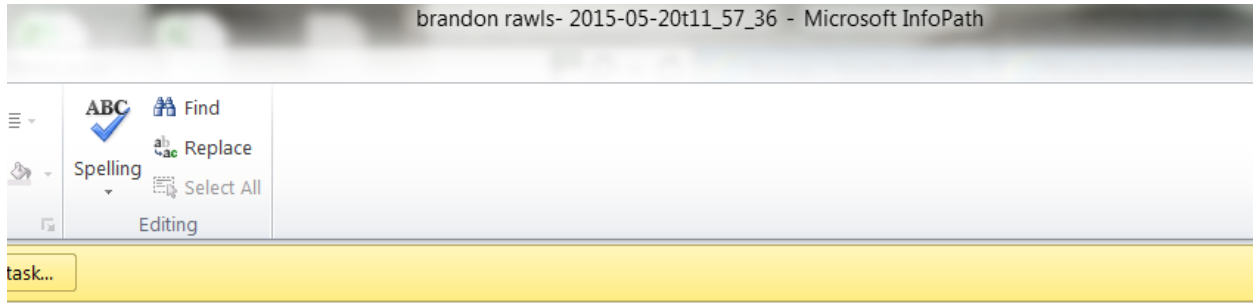
Delete Item









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	<p>This message will be included in your response.</p>

Approve Reject Cancel Reassign Task


Microsoft InfoPath Document:







 <b>Request for PaySource Card Funding</b>	
<i>ALL FIELDS MARKED RED ARE MANDATORY</i>	
Requestor Name	Kersey, Casey Jo  
Requestor Contact Phone	2634
Cardholder Name	Brandon Rawls  
Cardholder SUIID (Nine Number)	900184319
Does the cardholder have an existing PaySource card?	<input checked="" type="radio"/> YES <input type="radio"/> NO      Last 4 digits of currently issued card: <input type="text" value="9999"/>
Is this for team travel?	<input type="radio"/> YES <input checked="" type="radio"/> NO
Will this card be used for international travel?	<input type="radio"/> YES <input checked="" type="radio"/> NO
Relationship to Samford	<input checked="" type="radio"/> EMPLOYEE <input type="radio"/> STUDENT <input type="radio"/> OTHER
Trip / Purpose / Description	TEST TEST
Date(s)	05/20/15  TO 05/20/15 
Date Card Needed <sup>(1)</sup>	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.

**Workflow Task** PaySource Card Funding Approval Process Open this task...


 **Request for PaySource Card Funding**  
ALL FIELDS MARKED RED ARE MANDATORY


Requestor Name	Kersey, Casev Jo	 
Requestor Contact Phone	2634	
Cardholder Name	Brandon Rawls	 
Cardholder SUID (Nine	000184310	

**STEP 6:** Add your comments in the Comments box and click “Approve”.

**Workflow Task** □ ×

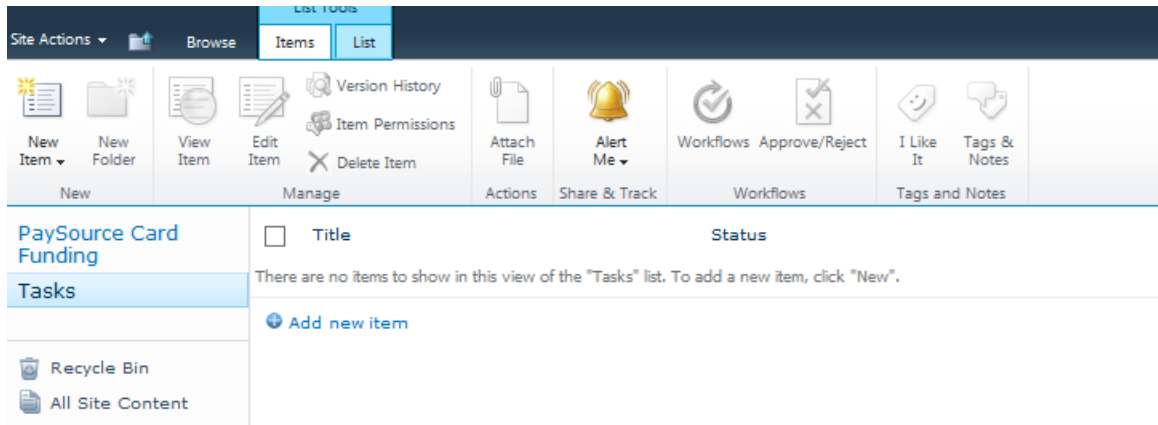
✕ Delete Item

 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	<div style="border: 1px solid gray; padding: 2px;">I approve this request.</div> <p style="font-size: small;">This message will be included in your response.</p>

Approve Reject Cancel Reassign Task

**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.