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**ENGINEERING  
STUDENT COUNCIL**  
IOWA STATE UNIVERSITY

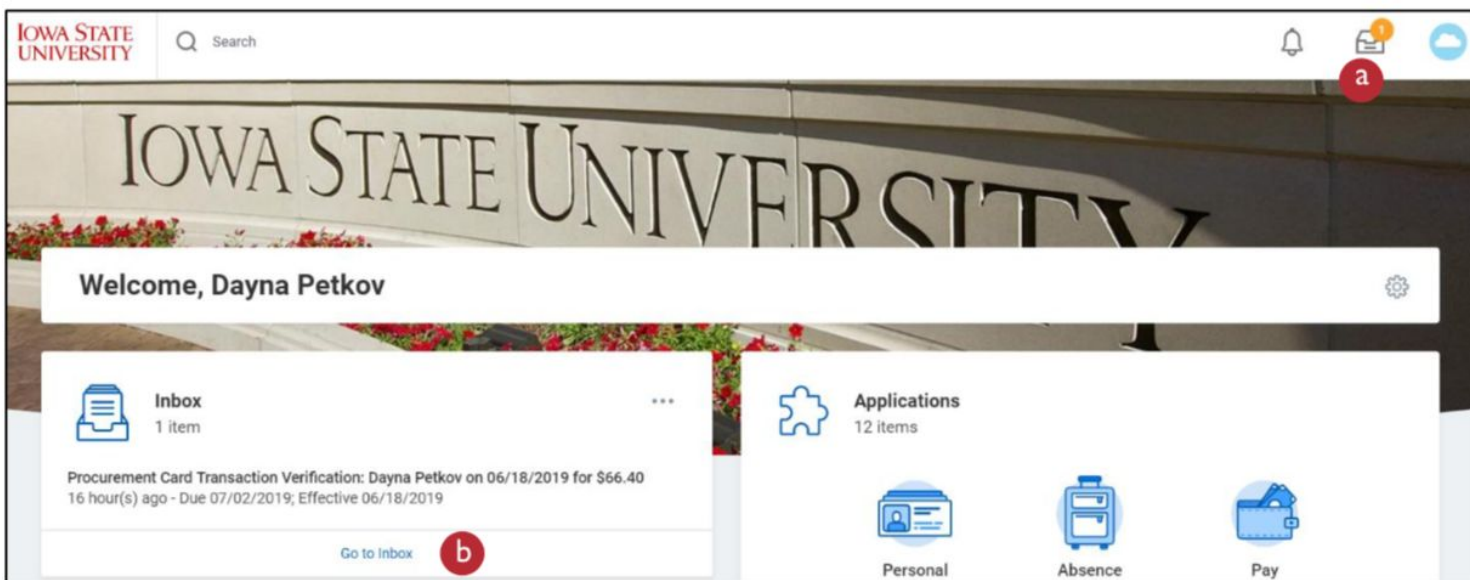


# Workday Overview

1. How to Verify P-Card Transactions (All P-Card Holders)
  - a. Will receive a notification in your inbox

# I. Receive Notification of New Procurement Card Transaction (Cardholder)

- I. 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

The screenshot displays a software interface with a blue header bar labeled "Inbox". Below the header, there are two main sections. The left section, titled "Actions (1)" and "Archive", contains a list of items. One item, "Procurement Card Transaction Verification: Dayna Petkov on 06/18/2019 for \$66.40", is highlighted with a red border. The right section, titled "Review Procurement Card Transaction Verification", shows the details of the selected item. It includes a title "Procurement Card Transaction Verification: Dayna Petkov on 06/18/2019 for \$66.40" and a sub-header "For Dayna Petkov". The "Total Verification Amount" is listed as "66.40 USD". Below this, there is a tabbed interface with "Information", "Attachments", and "Transaction Details" tabs. The "Transaction Details" tab is active, showing a table with one item: "PAPA JOHNS #29101" for "66.40 USD" on "05/28/2019". At the bottom of the interface, there are buttons for "Add", "Approve", "Send Back", and "Edit Summary Transaction".

**Inbox**

Actions (1) Archive

Viewing: All Sort By: Newest

Procurement Card Transaction Verification: Dayna Petkov on 06/18/2019 for \$66.40  
16 hour(s) ago - Due 07/02/2019; Effective 06/18/2019

**Review Procurement Card Transaction Verification**

Procurement Card Transaction Verification: Dayna Petkov on 06/18/2019 for \$66.40

For Dayna Petkov Total Verification Amount 66.40 USD

16 hour(s) ago - Due 07/02/2019; Effective 06/18/2019

Information Attachments **Transaction Details**

Add

1 item

PAPA JOHNS #29101 05/28/2019	66.40 USD
---------------------------------	-----------

Edit Summary Transaction

Approve Send Back

## 2. Verify Procurement Card Transaction (Cardholder)

- I. 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

Review Procurement Card Transaction Verification

Procurement Card Transaction Verification: Dayna Petkov on 06/18/2019 for \$66.40 Actions

16 hour(s) ago - Due 07/02/2019; Effective 06/18/2019

For  
Dayna Petkov

Total Verification Amount  
66.40 USD

Information

Attachments

Transaction Details

2. Enter information to verify the transaction in the **Transaction Details** tab:
- Information in the top half of the screen populates based on the transaction
  - The bottom half of the screen is where additional details are entered to verify the transaction

1 of 1Sort By: ▾

Testing 3150.00 USD03/26/2019

**Edit Summary Transaction**

Credit Card Transaction

03/26/2019 Testing 3 150.00 USD

Transaction Date

03/26/2019

Charge Description

Testing 3

Supplier

Purchase Order

Supplier Contract

**Amount**

Remaining Transaction Amount to Verify

0.00

Credit Card Transaction Amount

150.00

Transaction Currency

USD

Sales Tax Collected

☐

**Transaction Details** 1 item

Item and Category	Quantity	Transaction Amount	Item Identifiers	Item Tags	Converted Amount
<div>Line Item Description</div> <div></div>		<div>Unit Cost</div> <div>0.00</div>			<div>150.00</div>
<div>Spend Category</div> <div></div>		<div>Extended Amount</div> <div>150.00</div>			<div>Currency</div> <div>USD</div>

Submit

Save for Later

Close

3. Scroll to the bottom of the screen to enter the following required fields:
- Line Item Description:** This is a brief description of the purchase (e.g., Pizza)
  - Spend Category:** This will always be **SCI0863 Campus Org Review**.  
Search by typing 'Campus Org Review' or 'SCI0863' in that field and pressing enter
    - The Campus Organization Accounting Office will change the Spend Category as they review
  - Memo:** This is where the purpose is entered (e.g., Pizza for monthly Campus Christian Fellowship')

**Always Select SCI0863  
Campus Org. Review**

Transaction Details 1 item

Item and Category	Quantity	Transaction Amount	Converted Amount	Memo	G
<div>Item</div> <div><input type="text"/></div>	<div>0</div>	<div>Unit of Measure</div> <div><input type="text" value="select one"/></div>	<div>Currency Rate</div> <div>1</div>	<div></div>	
<div>Line Item Description</div> <div><input type="text"/></div>		<div>Unit Cost</div> <div><input type="text" value="0.00"/></div>	<div>Converted Amount</div> <div>66.40</div>		
<div>Spend Category</div> <div><input type="text"/></div>		<div>Extended Amount</div> <div><input type="text" value="66.40"/></div>	<div>Currency</div> <div>USD</div>		

- 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

Transaction Details 1 item

Project	Program <span>d</span>	Gift	Department Detail
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Scroll to the bottom of the screen to enter the following required fields
- Line Item Description:** This is a brief description of the purchase.
  - Spend Category:** This will always be SC10863 Campus Org Review. Search by typing 'Campus Org Review' or 'SC10863' in that field, enter:
    - The Campus Organization Accounting Office will change Category as they review
  - Memo:** This is where the purpose is entered (e.g. Pizza for monthly Christian Fellowship)

Transaction Details 1 item

Item and Category	Quantity	Transaction Amount	Encumbrance Amount
Item: <input type="text"/>	1	100.00	100.00
Line Item Description: <input type="text"/>			
Spend Category: <input type="text"/>			
		Encumbrance Amount 100.00	Encumbrance 100.00



4. Scroll to the bottom of the screen to upload attachments

Transaction Details 1 item

Project	Program	Gift	Department Detail	Assignee
	X PG108324 Campus Christian Fahip - AGRORG - CORG			

Attachments

Drop files here

or

Select files

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

Approve

Send Back

Add Approvers


...

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**

Success! Event approved [Procurement Card Transaction Verification: Dayna Petkov on 06/18/2019 for \\$66.40](#) [Actions](#)

16 hour(s) ago - Due 07/02/2019; Effective 06/18/2019

Up Next

 Keegan Ferreter

Approval by Student Org Treasurer

> **Details and Process**



# Changes to the Approval Process

- All P-Card holders must now process their transactions
- If you are a Treasurer and P-Card holder, it will go from you -> Advisor -> COA Manager
- If you are a P-Card holder but not the treasurer, it will go from you -> Treasurer -> Advisor -> COA Manager
- How to view all transactions made on your P-Card (All P-Card Holders)
  - Search for “My Procurement Card Transactions”
- How to view the status of your transactions on your card(All P-Card Holders)
  - Search for “My Procurement Card Transaction Verifications”
  - Once here, click the magnifying glass
  - Click the Process History tab to see where the transaction is in the process

**All Program Worktags  
must be written as PG#####**

**Make sure to  
select FY20!!**

## **Workday Overview Cont.**

1. How to find you Program Worktag (Presidents and Treasurers)
  - a. Student Organization Database
  - b. Should be written on your P-Card Sleeve if you were a new card holder this year, see me if you need one that you can write yours on
2. How to view your account transaction history (Treasurers Only)
  - a. Search for “ISU Transaction Detail”
3. How to view your current account balance (Treasurers Only)
  - a. Search for “ISU Financial Summary Balance Restricted Funds”

\*\*\*All of these pages you had to search for can be placed in your favorites on Workday



# Outreach Opportunity!

## First Lego League

- ❖ Saturday and Sunday (1/18/2020 & 1/19/2020)
- ❖ Event with over 4000 people, including 600 kids (each day)
- ❖ High Density Impact
- ❖ We can help with planning activities geared towards youth
- ❖ Opportunity for larger presentations
- ❖ Form going out later this week - Will be included when these slides are sent out and posted to the website



# Student Government Update

- Campus climate concerns centered around the residence halls and chalking have been raised recently
- Working with administration to address issues both reactively and proactively
- We are working on a plan of action to address these issues within the College
- Looking at Election Code tomorrow for StuGov elections in early March
  - Consider running for a Senate position if you're interested!



# Order of the Engineer

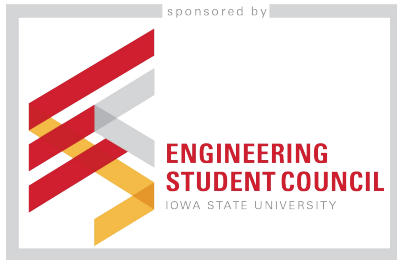
- Wednesday, Dec. 2 from 7-9pm in 2055 Hoover
  - Food after the ceremony
- Sign ups in 1300 Marston
  - Open NOW!
  - Close Nov. 22
- For graduating seniors (undergraduate and graduate)
- Description:
  - Foster a spirit of pride and responsibility in engineering profession
  - Commit to public health, safety, and welfare above all
  - Promise to be \*ethical\*
- Encourage your organizations and friends to sign up!





# Trademark Reminders

- Give the ESC Trademark overview [document](#) a read through sooner rather than later and email Nick Kline ([isu.esc.trademark@gmail.com](mailto:isu.esc.trademark@gmail.com)) with any questions
- If your club will be submitting trademark requests for competitions, remember the sooner the better!
- Questions?



**IOWA STATE UNIVERSITY**  
**Trademark Licensing Office**





## Updates & Announcements

- Corteva Tech Talk (6 pm in Hoover 1227) Today!
- MidAmerican Energy - 11/21 @ 6 pm in Marston 2155
- More Tech Talks in December (check E-Week website)
- Order of the Engineer - 12/2 @ 7 pm in Hoover 2055
- Dead Week Midnight Breakfast - 12/10 @ 10 pm in Howe Atrium