

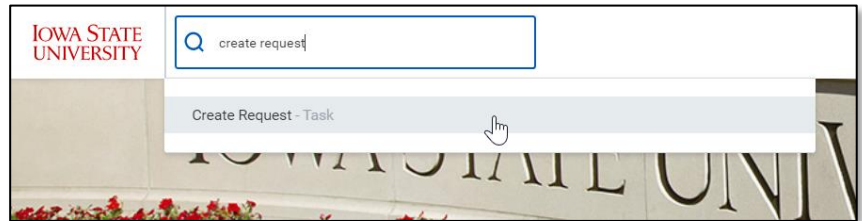
# Card Applications in Workday

1. [Applying for Travel & Hospitality \(T&H\) and Procurement Cards \(Pcard\)](#)
2. [Reviewing Status of Applications](#)
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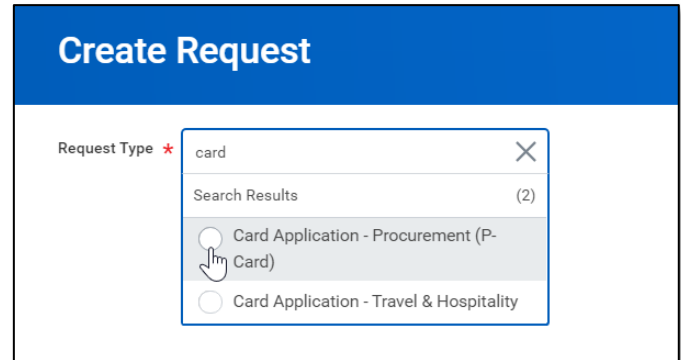
## Applying for Travel & Hospitality (T&H) and Procurement Cards (Pcard)

Applications for Travel & Hospitality (T&H) and Procurement Cards (Pcard) are submitted through the **Create Request** task in Workday

1. Navigate to the task by searching **Create Request** from the Workday Landing Page



2. Search 'card', press **enter** and select the desired card application
  - a. **Card Application – Procurement (P-Card)** to be used to purchase supplies and services
  - b. **Card Application – Travel & Hospitality** to be used for employee/guest travel and hospitality expenses



3. Select **Okay** at the bottom of the screen

4. The next screen will contain a series of questions to complete the card application:

A screenshot of the 'Card Application - Procurement (P-Card)' form. The form has a blue header with the title 'Card Application - Procurement (P-Card)'. Below the header, there is a text input field for 'Describe the Request'. Below this field, there is a paragraph of text: 'Completion of this Procurement Card Program online application and attendance at an orientation session are required to obtain a procurement card. sessions is available through Learn@ISU. The card is available to all faculty and staff of Iowa State University with the approval of their respective supervisor and cost center manager. Graduate director of Procurement Services. Hourly employees are not eligible to have a Procurement Card. Your personal credit history will in no way be affected by the ISU Procurement Card. Monthly statements will be paid directly by electronic funds transf'. At the bottom of the form, there is a text input field for 'Your Full Legal Name: (Required)'. The form is set against a white background with a blue header.

# Card Applications in Workday

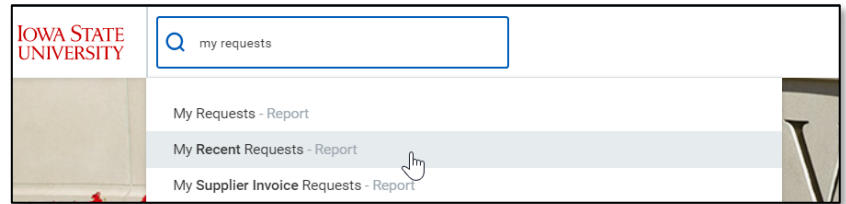
- a. Describe the Request – Provide a short description of how you plan to use the card.
  - b. Your Full Legal Name – Enter your full legal name.
  - c. Name on Card (if different from above) – If you have a preferred name you would like printed on the card, you may provide that name.
  - d. Your University ID Number – Enter your nine digit University ID number.
  - e. Your Department Name – Enter the name of your department.
  - f. Your University Address 1 (room, building) – Enter your university office room number and building. (or enter N/A if you do not have a suite, room, or building number)
  - g. Your University Address 2 – Enter your university office street address.
  - h. Your City, State, ZIP – Enter your university city, state, and ZIP code + 4.
  - i. Your University Phone Number – Enter your university phone number.
  - j. Your University Email Address – Enter your university email address.
  - k. Cycle Credit Limit – Choose the requested cycle limit. The cycle runs from the 12<sup>th</sup> of one month to the 11<sup>th</sup> of the next month.
  - l. Single Purchase Limit – Choose the requested single purchase limit.
5. Optionally, enter any **Comments** to be seen by approvers of the application
  6. Optionally, upload any **Attachments** by selecting 'Select Files' and searching for the file from your computer
  7. Select **Submit** once complete
  8. **Routing** is as follows:
    - a. Manager/Supervisor
    - b. Cost Center Manager
    - c. Procurement Services Department

The screenshot displays a user interface for submitting a card application. At the top, there is a text input field labeled 'enter your comment' with a blue speech bubble icon to its left. Below this is an 'Attachments' section, which includes a large light blue area with the text 'Drop files here' and a small 'or' separator. A 'Select files' button is positioned within this area. At the bottom of the form, there are three buttons: an orange 'Submit' button, a grey 'Save for Later' button, and a grey 'Cancel' button.

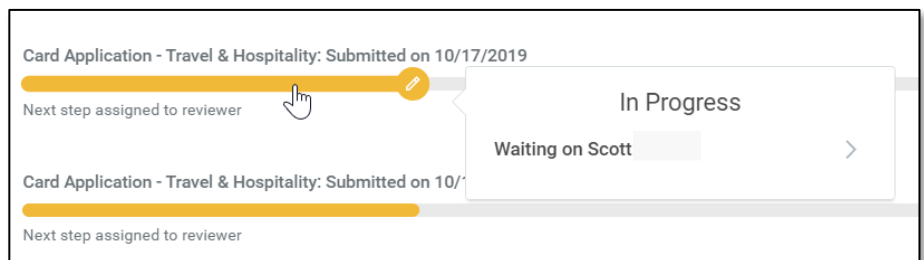
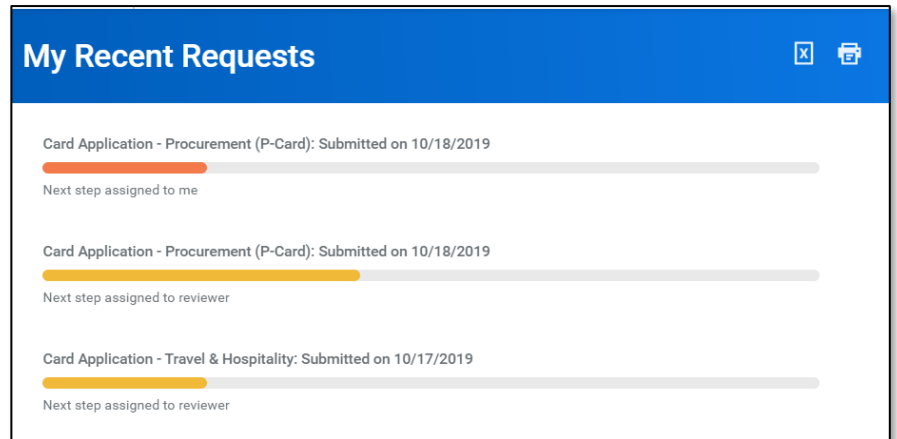
# Card Applications in Workday

## Review the Status of your Applications

1. Search and select **My Recent Requests** from the Workday Landing Page
2. Any requests initiated through the **Create Request** task will appear here. This includes card applications, but may also include other HR or Finance actions
3. The report displays next steps for each request




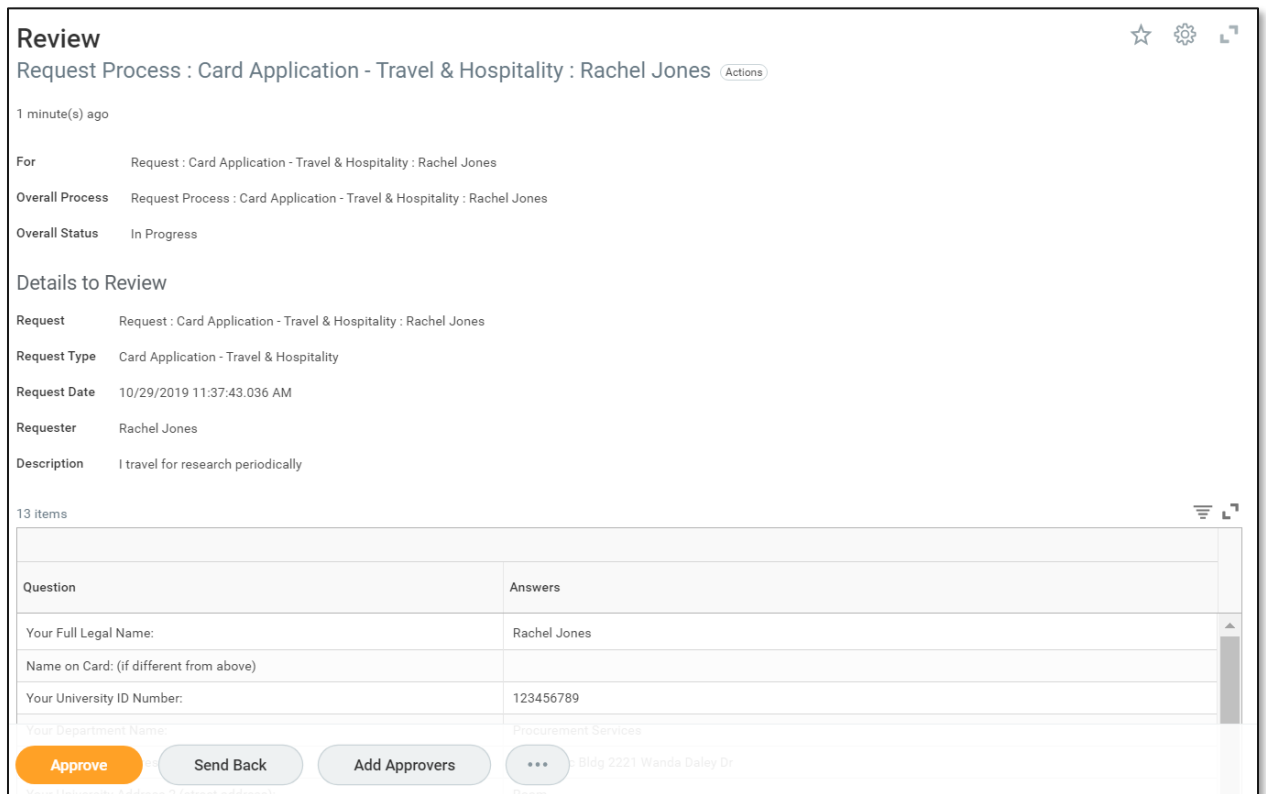
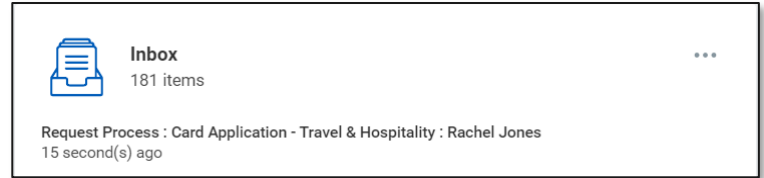
4. **Select each progress bar to see details**
  - a. In this example we see Scott is up to approve



# Card Applications in Workday

## Approving Applications (for Managers and Cost Center Managers)

1. Card applications are routed to Managers and Cost Center Managers for approval.
2. The card request will appear in your Inbox. Open your inbox to act on applications
3. Select a request within your inbox to view full details, process history, attachments and comments added by the initiator
4. Take action by selecting:
  - a. **Approve**: Approves the application and sends to the next approver or reviewer
  - b. **Send Back**: Send the application back to the initiator. Notes are required when doing so
  - c. **Add Approvers**: Search for any approvers beyond the employee's Manager or Cost Center Manager
  - d. Selecting the ellipsis  allows you to **deny** the application



The 'Review' page displays the following information:

- Request Process**: Card Application - Travel & Hospitality : Rachel Jones (Actions)
- Time**: 1 minute(s) ago
- For**: Request : Card Application - Travel & Hospitality : Rachel Jones
- Overall Process**: Request Process : Card Application - Travel & Hospitality : Rachel Jones
- Overall Status**: In Progress

**Details to Review**

- Request**: Request : Card Application - Travel & Hospitality : Rachel Jones
- Request Type**: Card Application - Travel & Hospitality
- Request Date**: 10/29/2019 11:37:43.036 AM
- Requester**: Rachel Jones
- Description**: I travel for research periodically

13 items

Question	Answers
Your Full Legal Name:	Rachel Jones
Name on Card: (if different from above)	
Your University ID Number:	123456789
Your Department Name:	Procurement Services

At the bottom, there are four buttons: **Approve** (orange), **Send Back**, **Add Approvers**, and an ellipsis menu. The ellipsis menu is currently open, showing a user selection: **Blig 2221 Wanda Daley Dr**.