

Evolve Fluid Forms
Work Instructions for Electronic Credit Card Applications and Changes

The following Work Instructions will guide you through the process of:

1. Applying for a new US Bank Visa card;
2. Making changes to your existing US Bank Visa card; and
3. If you are an Approver, how to approve a request.

Two (2) separate electronic forms have been developed:

1. New Credit Card
2. Change Credit Card All (to be used to make changes to your Card)

In order to complete any of the above forms, users will require the following access:

- Access to Evolve Finance Production System
- Access to Fluid Forms in Evolve Production

Evolve Fluid Forms
Work Instructions for Electronic Credit Card Applications and Changes

Table of Contents

1. For Requestors: Applying for a New Credit Card	3
2. For Requestors: Submitting the Application Form/Change Request Form for Approval	5
3. For Requestors: Credit Card Change Form (Change_Credit_Card_All)	7
4. For Requestors and Approvers: To View Form Instructions	9
5. For Approvers: Approving or Denying the Credit Card Form	10
6. For Requestors and Approvers: Reviewing Pending Approvals	12

1. For Requestors: Applying for a New Credit Card

The following work instructions will guide you through applying for a new US Bank Visa card. Simply choose the New Credit Card form.

1. Login to the Evolve production system using your normal Fleming College sign-in credentials
2. Navigate to: Fluid Forms --> Form and Approval Builder (FI) --> Fleming Forms
3. Select New Credit Card form
4. Click on “Fill Out a New Form”, the green button located in the upper left-hand corner of the screen (a new blank form will appear)
5. Enter all fields, including mandatory fields marked with *
6. **Employee ID:**
 - You can search the Employee ID field using the magnifying glass, or by the first or last name
7. **Approvers Section:**
 - **Employee Manager:** Select the Employee Manager User ID. To do this, select the magnifying glass and then expand the “Search Criteria” drop down, as shown below. This will provide 3 options for searching by name:

Evolve Fluid Forms

Work Instructions for Electronic Credit Card Applications and Changes

Cancel
Lookup

Search for: 1st. Sch/Dept Appr Show Operators

Search Criteria

Name Display (begins with)

Last Name (begins with)

First Name (begins with)

Search Results

2 rows

User ID	Name Display	Last Name	First Name
kattenbo	Kathy Attenborough-Soutar	ATTENBOROUGH-SOUTAR	KATHY
kattanyi	Kamal Attyani	ATTYANI	KAMAL

- **VP Approver:** Every application requires a secondary departmental approver, which would be the Senior Management Team (SMT) member who has overall responsibility for the department/division. Select the SMT Approver in the same way you selected the Employer Manager as described in the bullet above.

Example of a Completed Card application:

New_Corporate_CCard
New_Corporate_CCard

*Description

Approval Status: Initial Created On: 11/03/2020

*Card Type: Corporate (Travel) *Campus: Sutherland

*Reason

Employee Info

*Employee ID: <input type="text" value="10213704"/>	*First Name: <input type="text" value="Kamal"/>
*Last Name: <input type="text" value="Attyani"/>	Job Title: <input type="text"/>
*Dept No: <input type="text" value="131001"/>	*Dept Name: <input type="text" value="IT Main"/>
*Date of Birth: <input type="text" value="11/01/2020"/>	*Tel(H)xxx-xxx-xxxx: <input type="text" value="5555"/>
*Work Phone: <input type="text" value="Sutherland (705) 749-5530"/>	*Work Phone Ext: <input type="text" value="555"/>
*Email: <input type="text" value="555"/>	

Legal Name

*Legal First Name: <input type="text" value="Kamal"/>	*Legal Last Name: <input type="text" value="Attyani"/>
*Legal Middle Name: <input type="text" value="A"/>	

Spending Limits

*Monthly Purchase: <input type="text" value="\$ 10,000.00"/>	*Single Transaction: <input type="text" value="0"/>
--------------------------------------------------------------	-----------------------------------------------------

Approvers

*Employee Manager: <input type="text" value="bmccue"/>	*VP Approver: <input type="text" value="kattanyi"/>
More Information: <input type="text"/>	

Attachments

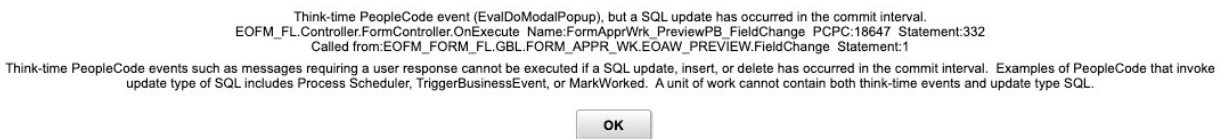
There is no attachment uploaded.

8. If necessary, you can add attachments by selecting the “Add Attachment” button and following the user prompts.
9. At this stage follow the next section, titled “[Submitting the Application Form/Change Request Form for Approval.](#)”

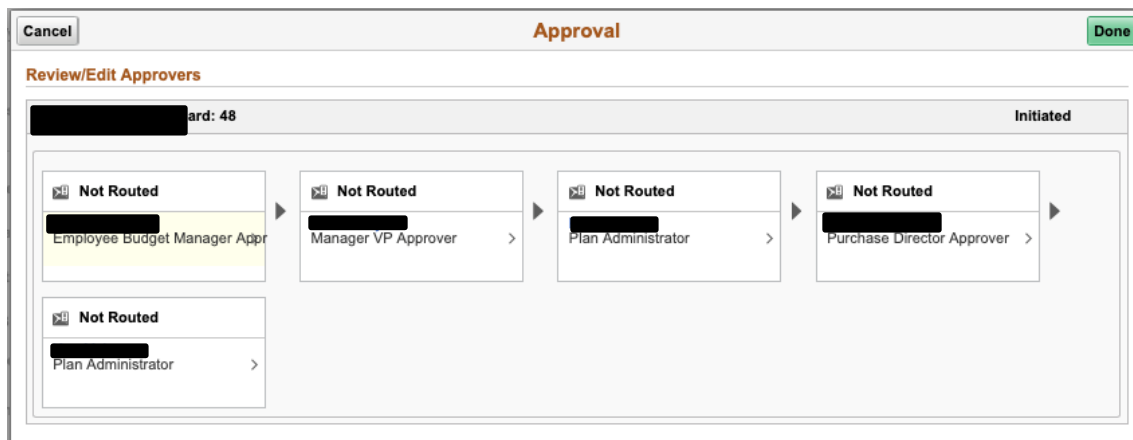
2. For Requestors: Submitting the Application Form/Change Request Form for Approval

Once the Application Form or Change Request Form has been completed in full, submitting for approval is simple:

1. Select “Save” in the upper right-hand corner
2. Select “Preview Approval” to review the approval workflow for all five (5) approvers. (In some instances, the following warning message may appear:



3. You can ignore this message and select “OK”.
4. Select “Preview Approval” again and it will show the approval list below, with the list of Approvers and the sequential approval flow.



5. Ensure that the first two (2) Approvers in the approval flow are the correct Manager and SMT that this application should be forwarded to.
6. Select “Done” in the upper right-hand corner.
7. Finally select “Submit”.
8. At this point an automated email will be sent to the first Approver, notifying them that a user has submitted an application that requires their review and potential approval.

Evolve Fluid Forms
Work Instructions for Electronic Credit Card Applications and Changes

If/when they approve, an automated email will be sent to the second Approver, and so on, and so on. If at any point the application is denied, the Requestor will receive an email advising them that the application was denied.

3. For Requestors: Credit Card Change Form (Change_Credit_Card_All)

The following work instructions will guide your through requesting a change to your existing Visa card.

1. Login to the Evolve production system using your normal Fleming College sign-in credentials.
2. Navigate to:
 - Fluid Forms->Form and Approval Builder (Fi) ->Fleming Forms
3. Select Change Credit Card All form
4. This Change Form is to be used for all changes required on your Card, and more than one change can be requested at a time. It's up to the Requestor to decide what sections and fields to complete, however the fields with an * are mandatory.

The screenshot shows the 'Change_Credit_Card_All' form interface. At the top, there are navigation icons and buttons for 'Save', 'Preview Approval', and 'Submit'. The form is divided into several sections:

- Description:** *Description: Test
- Approval Status:** Initial
- Created On:** 11/04/2020
- Employee Information:** *Employee ID: 10213704, *Last Name: Atyani, Dept No: 131001, *Legal First Name: Kamal, *Legal Last Name: Atyani, *First Name: Kamal, *Card Type: [dropdown], Dept Name: IT Main, *Legal Middle Name: A.
- Effective Dates:** *Start Date: 11/01/2020, End Date: [calendar icon]
- Monthly Limit \$:** Change Type: [dropdown], Amount From \$: [input], Amount To \$: [input], Change Reason: [text area]
- Other Changes:** Cancel Card: Yes, Hold/Block Card: Yes, Name Change: Yes, Cancel Reason: [text area], Hold Reason: [text area], New Name Details: [text area]
- Authorized User:** Type: [dropdown], Auth Employee ID: [input], Auth First Name: [input], Auth Last Name: [input]
- Approver Info:** *Employee Manager: cdemont, *VP Approver: bmccue, More Information: [text area]
- Attachments:** There is no attachment uploaded. Add Attachment button.

Evolve Fluid Forms
Work Instructions for Electronic Credit Card Applications and Changes

5. **Approvers Section:**

- **Employee Manager:** Select the Employee Manager User ID. To do this, select the magnifying glass and then expand the “Search Criteria” drop down, as shown below. This will provide 3 options for searching by name:

The screenshot shows a 'Lookup' window with a search criteria section and search results. The search criteria section includes three input fields: 'Name Display (begins with)', 'Last Name (begins with)' containing 'ATT', and 'First Name (begins with)' containing 'K'. There are 'Search' and 'Clear' buttons. The search results section shows a table with 2 rows.

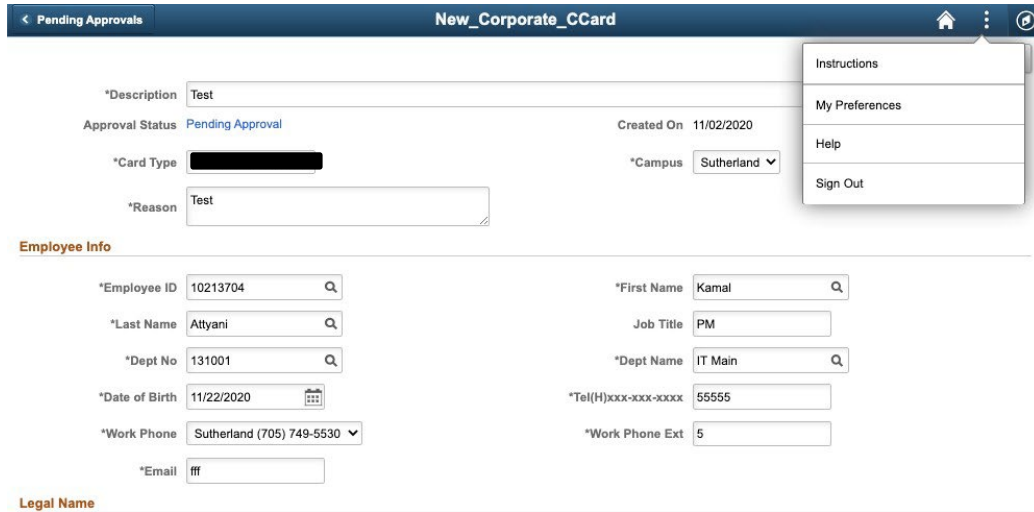
User ID	Name Display	Last Name	First Name
kattenbo	Kathy Attenborough-Soutar	ATTENBOROUGH-SOUTAR	KATHY
kattanyi	Kamal Attyani	ATTYANI	KAMAL

- **VP Approver:** Every application requires a secondary departmental approver, which would be the VP who has overall responsibility for the department/division. Select the VP Approver in the same way you selected the Employer Manager as described in the bullet above.
6. If necessary, you can add attachments by selecting the “Add Attachment” button and following the user prompts.
7. To submit your form for approval, follow the steps outlined in *Section 2. [“Submitting the Application Form/Change Request Form for Approval”](#)*.

4. For Requestors and Approvers: To View Form Instructions

While in the Application Form or Change Form, if you would like to view a summary of the instructions you can do so as follows:

1. Click on the Instruction menu option in the upper right corner as shown below:

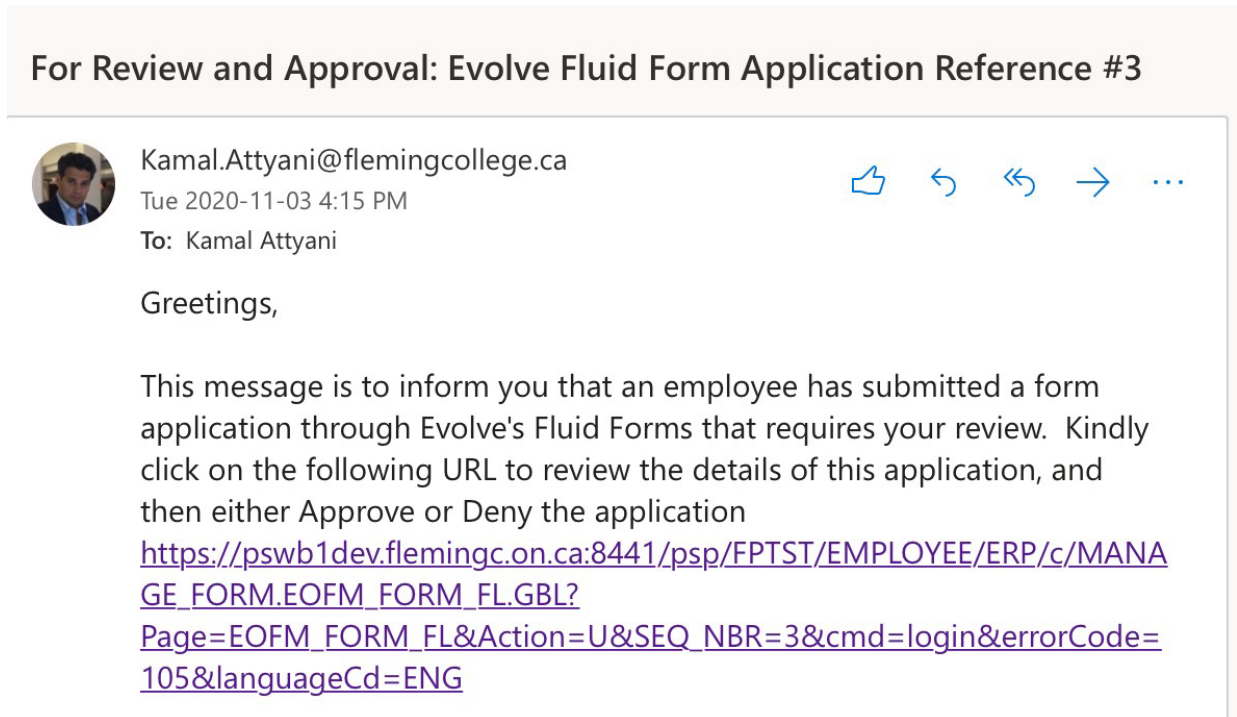


The screenshot shows a web application interface for 'New_Corporate_CCard'. The top navigation bar includes a back arrow, 'Pending Approvals', the title 'New_Corporate_CCard', a home icon, and a user profile icon. A dropdown menu is open from the user profile icon, listing 'Instructions', 'My Preferences', 'Help', and 'Sign Out'. The main form area contains several fields: '*Description' (Test), 'Approval Status' (Pending Approval), 'Created On' (11/02/2020), '*Card Type' (redacted), '*Campus' (Sutherland), and '*Reason' (Test). Below this is the 'Employee Info' section with fields for '*Employee ID' (10213704), '*Last Name' (Atyani), '*Dept No' (131001), '*Date of Birth' (11/22/2020), '*Work Phone' (Sutherland (705) 749-5530), '*First Name' (Kamal), 'Job Title' (PM), '*Dept Name' (IT Main), '*Tel(H)xxxx-xxxx-xxxx' (55555), '*Work Phone Ext' (5), and '*Email' (fff). The 'Legal Name' section is partially visible at the bottom.

2. The Instructions screen appears with details and field information

5. For Approvers: Approving or Denying the Credit Card Form

1. The Approver will receive an email notification to their College email account similar to the following:



2. Click on the link and the Evolve Sign-In page will open. Login to the Evolve production system using your normal Fleming College sign-in credentials.
3. The Application Form will then be displayed, and the Approver can review the contents of the form.
4. At this stage, the Approver has the option to either Approve the request or Deny it:
 - If approved, the application request will then proceed to the 2nd or subsequent Approver, and so on. Email notifications will be sent each time it progresses through the approval process to the next Approver in the sequence.
 - If denied, the application request will not proceed any further and an email notification will be sent to the Requestor notifying them that the form has been denied.
5. To Approve or Deny, select the appropriate button in the upper right-hand corner of the screen, following which a dialog box will open (see below). Enter a supporting comment for your decision. Once the comment is entered select "Submit", and the dialog box will close.

Evolve Fluid Forms Work Instructions for Electronic Credit Card Applications and Changes

The screenshot displays a web application interface for managing credit card applications. The main header shows 'Pending Approvals' and 'New_Corporate_CCard'. The application details include a description of 'Test', an approval status of 'Pending Approval', and a creation date of '11/02/2020'. A modal window titled 'Approve' is overlaid on the main form, featuring a 'Comment' text area and 'Cancel' and 'Submit' buttons. The background form includes fields for 'Card Ty', '*Reas', and an 'Employee Info' section with fields for '*Employee', '*Last Na', '*Dept', '*Date of BI', '*Work Pho', and '*Em'.

6. Select "Save".
7. You have now successfully "Approved" or "Denied" the application and can log-out from the application. If you would like to confirm that your selection was completed correctly, you can select "Pending Approval" link beside the **Approval Status** section on the main page.

6. For Requestors and Approvers: Reviewing Pending Approvals

If you are an Approver: If you would like to see if there are any applications awaiting your approval, you can login at any time and check by doing the following:

1. Login to the Evolve production system using your normal Fleming College sign-in credentials and navigate to the following location:
 - Fluid Forms->Forms and Approver Builder (FI)->Approvals
2. A screen with pending Approvals appears
3. Click on the request you would like to review to open the form. Follow the instructions detailed in Section 4. [Approving or Denying the Credit Card Application Form.](#)

If you are a Requestor: If you would like to review the status of your application, you can login at any time and check by doing the following:

1. Login to the Evolve production system using your normal Fleming College sign-in credentials and navigate to the following location:
 - Fluid Forms->Forms and Approver Builder (FI)->My Forms
2. A screen with showing all of your submitted forms appears
3. Here you can see the Approval Status of all of your requests, or if you wish, you may select any request to see further detail

Evolve Fluid Forms
Work Instructions for Electronic Credit Card Applications and Changes