

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

In addition to these written work instructions, video demonstrations have also been developed. To view the video demonstrations, please use the following link:

- [New Credit Card Application Form Video](#)
- [Credit Card Change Form Video](#)
- [Credit Card Approval Video](#)

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

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

Three (3) separate electronic forms have been developed:

1. New Corporate Credit Card
2. New Purchasing Credit Card
3. Change Credit Card All (to be used to make changes to either your Corporate or Purchasing 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

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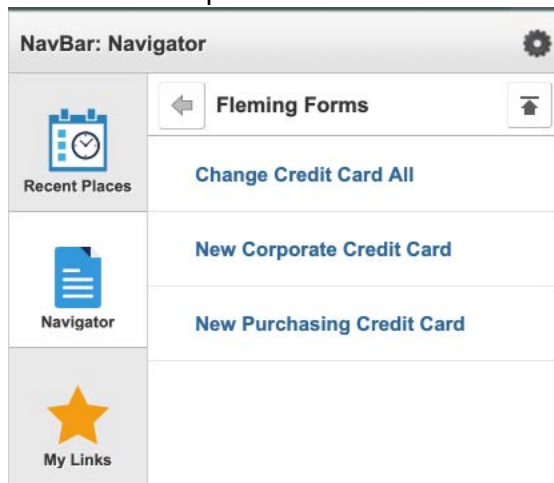
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1. For Requestors: Applying for a New Corporate or Purchasing Credit Card

The following work instructions will guide your through applying for a new US Bank Corporate or Purchasing Visa card. The application process is the same for either card, simply choose the applicable form (“New Corporate Credit Card” or “New Purchasing Credit 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 New Corporate Credit Card or New Purchasing 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:

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Cancel Lookup

Search for: 1st. SchDept Appr

▼ Search Criteria Show Operators

Name Display (begins with)

Last Name (begins with)

First Name (begins with)

Search Clear

▼ Search Results

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

- **VP Approver:** Every application requires a secondary departmental approver, which would be the Vice President (“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.

Example of a Completed Corporate Card application:

New_Corporate_Card New_Corporate_Card

Save Preview Approval Submit

*Description

Approval Status Initial Created On 11/03/2020

*Card Type Corporate (Travel) *Campus Sutherland

*Reason

Employee Info

*Employee ID *First Name

*Last Name Job Title

*Dept No *Dept Name

*Date of Birth *Tel(H)xxx-xxx-xxxx

*Work Phone *Work Phone Ext

*Email

Legal Name

*Legal First Name *Legal Last Name

*Legal Middle Name

Spending Limits

*Monthly Purchase *Single Transaction

Approvers

*Employee Manager *VP Approver

More Information

Attachments

There is no attachment uploaded.

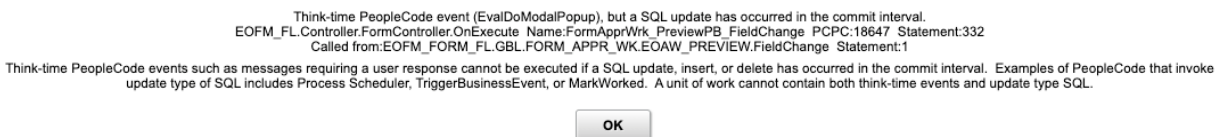
Add Attachment

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.](#)”

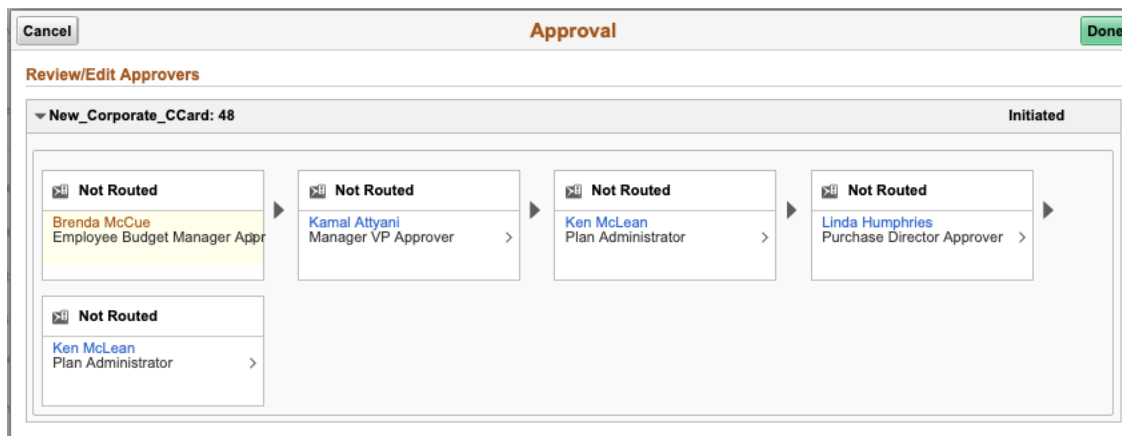
2. For Requestors: Submitting the Application Form/Change Request Form for Approval

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.

A screenshot of the "Approval" window. The window has a title bar with "Cancel", "Approval", and "Done" buttons. Below the title bar is a section titled "Review/Edit Approvers". Under this section, there is a header "New_Corporate_Card: 48" and a status "Initiated". The main area displays a sequential approval flow. It starts with a box labeled "Not Routed" containing "Brenda McCue" (Employee Budget Manager Approver). This is followed by three more boxes, each labeled "Not Routed" and containing a name and title: "Kamal Attyani" (Manager VP Approver), "Ken McLean" (Plan Administrator), and "Linda Humphries" (Purchase Director Approver). Each box has a right-pointing arrow. Below the first box, there is another box labeled "Not Routed" containing "Ken McLean" (Plan Administrator) with a right-pointing arrow.

5. Ensure that the first two (2) Approvers in the approval flow are the correct Manager and VP 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. If/when they approve, an automated email will be sent to the second Approver, and so

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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.

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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 Corporate or Purchasing 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 for both the Corporate and Purchasing cards.
4. This Change Form is to be used for all changes required on your Corporate or Purchasing 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.

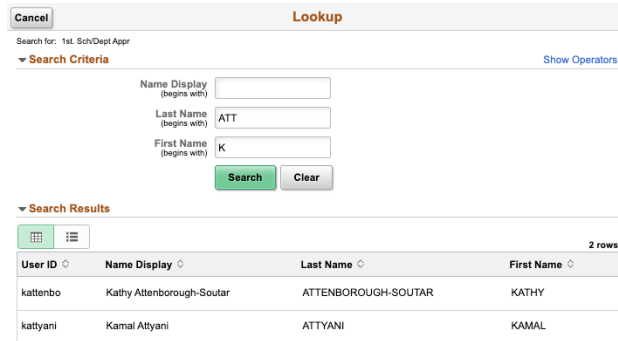
The screenshot displays the 'Change_Credit_Card_All' form within the Evolve Fluid Forms application. The form is organized into several sections with expandable headers. At the top, there are navigation buttons: 'Save' (blue), 'Preview Approval' (grey), and 'Submit' (green). The form fields are as follows:

- Description:** Text field containing 'Test'.
- Approval Status:** Dropdown menu set to 'Initial'.
- Created On:** Date field showing '11/04/2020'.
- *Employee ID:** Text field with '10213704' and a search icon.
- *First Name:** Text field with 'Kamal' and a search icon.
- *Last Name:** Text field with 'Attyani' and a search icon.
- *Card Type:** Dropdown menu set to 'Purchasing'.
- Dept No:** Text field with '131001' and a search icon.
- Dept Name:** Text field with 'IT Main' and a search icon.
- *Legal First Name:** Text field with 'Kamal'.
- *Legal Middle Name:** Text field with 'A'.
- *Legal Last Name:** Text field with 'Attyani'.
- Effective Dates:**
 - *Start Date:** Date field with '11/01/2020' and a calendar icon.
 - End Date:** Date field with a calendar icon.
- Monthly Limit \$:**
 - Change Type:** Dropdown menu.
 - Amount From \$:** Text field.
 - Amount To \$:** Text field.
 - Change Reason:** Text area.
- Other Changes:**
 - Cancel Card:** Toggle switch set to 'Yes'.
 - Cancel Reason:** Text area.
 - Hold/Block Card:** Toggle switch set to 'Yes'.
 - Hold Reason:** Text area.
 - Name Change:** Toggle switch set to 'Yes'.
 - New Name Details:** Text area.
- Authorized User:**
 - Type:** Dropdown menu.
 - Auth Employee ID:** Text field with a search icon.
 - Auth First Name:** Text field with a search icon.
 - Auth Last Name:** Text field with a search icon.
- Approver Info:**
 - *Employee Manager:** Text field with 'cdemont' and a search icon.
 - *VP Approver:** Text field with 'bmccue' and a search icon.
 - More Information:** Text area.
- Attachments:**
 - Text: 'There is no attachment uploaded.'
 - Add Attachment:** Button.

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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:



Search for: 1st. Sch/Dept Appr

▼ Search Criteria [Show Operators](#)

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
kattyani	Kamal Attyani	ATTYANI	KAMAL

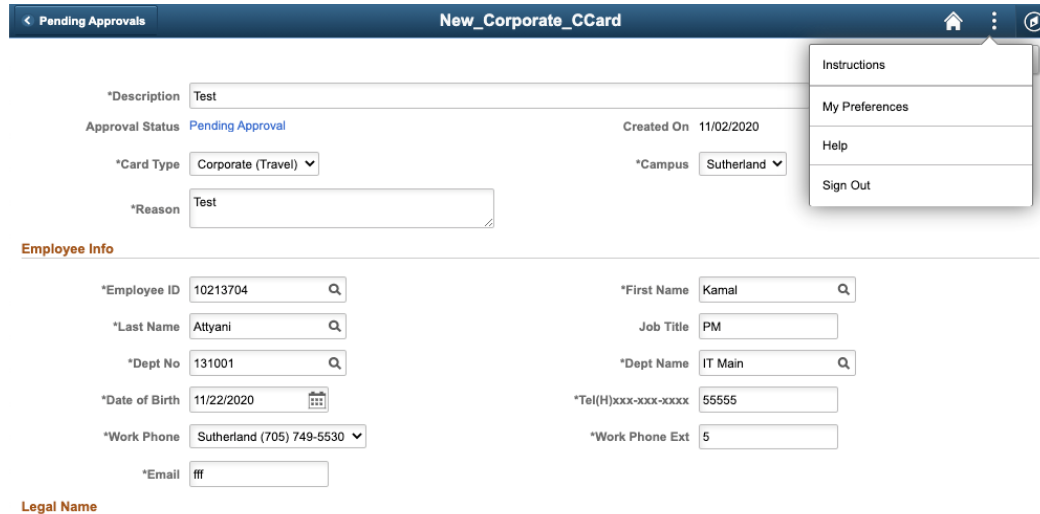
- **VP Approver:** Every application requires a secondary departmental approver, which would be the VP who has overall responsibility for the department/division. Select the VP Approver in the same way you selected the Employer Manager as described in the bullet above.
6. If necessary, you can add attachments 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](#)”*.

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4. For Requestors and Approvers: To View Form Instructions

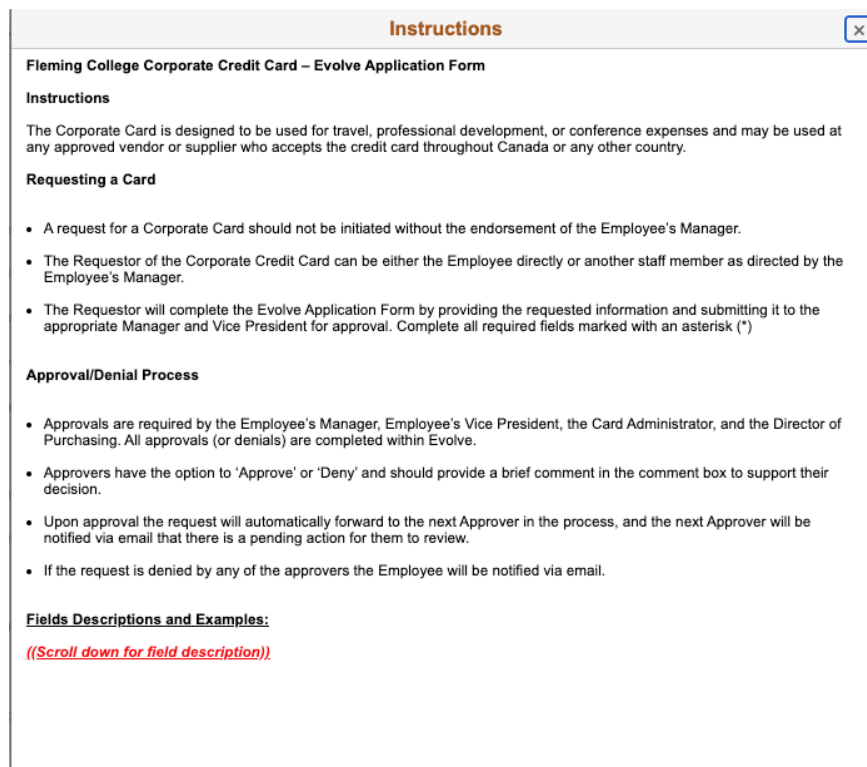
While in the Application Form or Change Form, if you would like to view a summary of the instructions you can do so as follows:

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



The screenshot shows the 'New_Corporate_Card' form. The top navigation bar includes a back arrow, 'Pending Approvals', the title 'New_Corporate_Card', and icons for home, settings, and help. A dropdown menu is open in the top right corner, showing options: 'Instructions', 'My Preferences', 'Help', and 'Sign Out'. The form fields include: *Description (Test), Approval Status (Pending Approval), Created On (11/02/2020), *Card Type (Corporate (Travel)), *Campus (Sutherland), *Reason (Test), Employee Info section with fields for *Employee ID (10213704), *Last Name (Attyani), *Dept No (131001), *Date of Birth (11/22/2020), *Work Phone (Sutherland (705) 749-5530), *Email (fff), *First Name (Kamal), Job Title (PM), *Dept Name (IT Main), *Tel(H)xxx-xxx-xxxx (55555), and *Work Phone Ext (5). The Legal Name section is also visible.

2. The Instructions screen appears with details and field information:



The screenshot shows the 'Instructions' screen for the 'Fleming College Corporate Credit Card - Evolve Application Form'. The title bar says 'Instructions' with a close button. The content includes: **Instructions**
The Corporate Card is designed to be used for travel, professional development, or conference expenses and may be used at any approved vendor or supplier who accepts the credit card throughout Canada or any other country.
Requesting a Card

- A request for a Corporate Card should not be initiated without the endorsement of the Employee's Manager.
- The Requestor of the Corporate Credit Card can be either the Employee directly or another staff member as directed by the Employee's Manager.
- The Requestor will complete the Evolve Application Form by providing the requested information and submitting it to the appropriate Manager and Vice President for approval. Complete all required fields marked with an asterisk (*)

Approval/Denial Process

- Approvals are required by the Employee's Manager, Employee's Vice President, the Card Administrator, and the Director of Purchasing. All approvals (or denials) are completed within Evolve.
- Approvers have the option to 'Approve' or 'Deny' and should provide a brief comment in the comment box to support their decision.
- Upon approval the request will automatically forward to the next Approver in the process, and the next Approver will be notified via email that there is a pending action for them to review.
- If the request is denied by any of the approvers the Employee will be notified via email.

Fields Descriptions and Examples:
((Scroll down for field description))

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Instructions ✕			
Fields	Mandatory?	Description	Examples (Where applicable)
Description	Yes	Form description field used to summarize request	Eg. "Credit card request for John Doe."
Card Type	Yes	Select Corporate	Eg. "Corporate"
Reason	Yes	Reason for requesting Credit card for the Employee	Eg. "Card request for new employee for departmental use."
Employee ID	Yes	Employee ID for the Employee receiving the credit Card	(This is the employee ID provided by Human Resources.)
First Name	Yes	Select Employee First Name. This is the Employee preferred name and will appear on the card.	Eg. "John"
Last Name	Yes	Select Employee Last Name	Eg. "Doe"
			Provide as

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:

For Review and Approval: Evolve Fluid Form Application Reference #3



Kamal.Attyani@flemingcollege.ca
Tue 2020-11-03 4:15 PM
To: Kamal Attyani

Greetings,

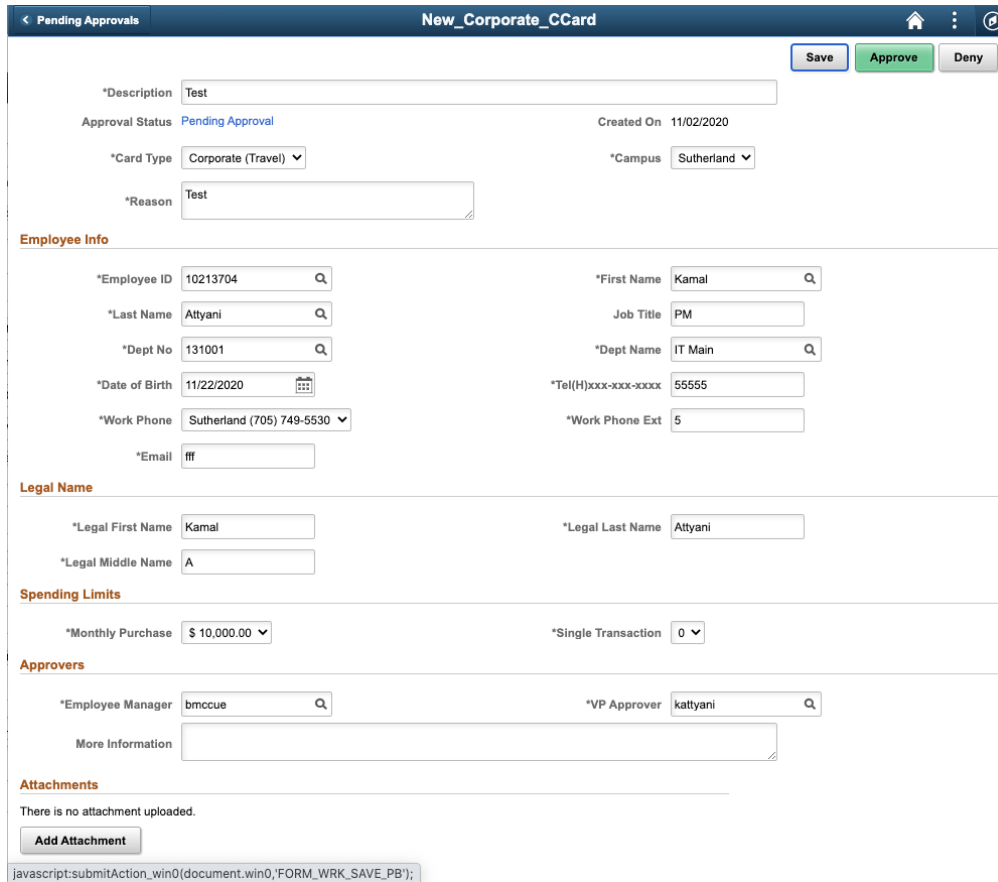
This message is to inform you that an employee has submitted a form application through Evolve's Fluid Forms that requires your review. Kindly click on the following URL to review the details of this application, and then either Approve or Deny the application




https://pswb1dev.flemingc.on.ca:8441/psp/FPTST/EMPLOYEE/ERP/c/MANAGE_FORM.EOFM_FORM_FL.GBL?Page=EOFM_FORM_FL&Action=U&SEQ_NBR=3&cmd=login&errorCode=105&languageCd=ENG

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. See an example of the form on the next page.

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< Pending Approvals **New_Corporate_CCard**   

Save **Approve** **Deny**

*Description

Approval Status **Pending Approval** Created On 11/02/2020

*Card Type *Campus

*Reason

Employee Info

*Employee ID *First Name

*Last Name Job Title

*Dept No *Dept Name

*Date of Birth *Tel(H)xxx-xxx-xxxx

*Work Phone *Work Phone Ext

*Email

Legal Name

*Legal First Name *Legal Last Name

*Legal Middle Name

Spending Limits

*Monthly Purchase *Single Transaction

Approvers

*Employee Manager *VP Approver

More Information

Attachments

There is no attachment uploaded.

Add Attachment

javascript:submitAction_win0(document.win0,'FORM_WRK_SAVE_PB');

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.

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The screenshot shows a web application interface for managing credit card applications. The main form is titled "New_Corporate_Card" and is currently in the "Pending Approvals" state. The "Approval Status" is "Pending Approval" and the "Created On" date is "11/02/2020". The form includes fields for "*Description" (containing "Test"), "*Card Ty", "*Reas", and "Employee Info" (with sub-fields for "*Employee", "*Last Na", "*Dept", "*Date of Bi", "*Work Pho", and "*Em"). A modal dialog box is open over the form, titled "Approve", with a "Cancel" button, a "Submit" button, and a large text area for "Comment".

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

- A screen with pending Approvals appears:



Pending Approvals		
View By Type		
All	4	
Forms	4	
All 4 rows		
Forms	from Kamal Attyani New_Corporate_CCard Test Fri Sep 25	Routed 09/25/2020
Forms	from Kamal Attyani New_Purchasing_CCard Test with team	Routed 10/01/2020
Forms	from Patty Russell New_Corporate_CCard New corporate card request for Bonnye Fusco	Routed 10/02/2020
Forms	from Kamal Attyani New_Corporate_CCard Test	Routed 11/05/2020

2. 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

- A screen with showing all of your submitted forms appears:



My Forms				
Fill out a new form				
View By Status				
All	4			
Initial	4			
Forms				
Form	Description	Approval Status	Created Datetime	Submitted Datetime
Change_Credit_Card_All	Test	Initial	11/04/20 9:43AM	
New_Purchasing_CCard	Test	Initial	11/04/20 9:41AM	
New_Corporate_CCard	Test	Initial	11/04/20 9:39AM	
New_Corporate_CCard	Test	Initial	11/04/20 9:36AM	

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2. Here you can see the Approval Status of all of your requests, or if you wish, you may select any request to see further details.