

## How to use the PCard Approval History menu option in MOPS

### PCARD Approval History

Use this menu option to view the approval status of reconciled PCard transactions. Enter at least **one** criteria below to define your transaction search, then click **List**.

If entering a **Cardholder ID** or **Appl Ref #**, it is recommended to also enter a **Start Date** and **End Date** to limit the search.

Click **Reset** to clear the entered criteria.

Audit #

Banner Doc #

Cardholder ID

Start Date   End Date

Appl Ref #

Status Waiting for Approval

1. Log in to Minerva (<http://www.mcgill.ca/minerva>)
2. Go to the **Finance (Fund) Administration Menu**
3. Select the **PCard – MOPS Menu**
4. Select the **PCard Approval History** menu option.
5. By default, all transactions “Waiting for Approval” will be displayed.
6. Click on the “+” sign in front of a transaction to view approval details/status, such as FOAPAL(s) charged and the associated Approver(s):

Audit #	Banner Doc #	Trans date	Status	Amount	Receipt (CDN)		
201708060000411			Waiting for Approval	781.58	<a href="#">View</a>		
<b>FOAPAL</b>	<b>Queue and Description</b>	<b>Level</b>	<b>Status</b>	<b>Approvers</b>	<b>FST Reconciled</b>	<b>Approval Date</b>	<b>Ledger Amount</b>
-700003-2000-000000-000000	7CS1-Non-central queue for fund	20	Waiting for Approval		N		781.58
-700003-2000-000000-000000	7CS1-Non-central queue for fund	20	Waiting for Approval		N		781.58

### Note:

Level 10 Approver = Approval Delegate

Level 20 Approver = Fund Financial Manager/Principal Investigator

Level 50 Approver = Central Fund Administrator (if applicable)

7. **Optional:** Click on the **View** hyperlink in the **Receipt** field to view the uploaded supporting documents for the transaction.

**NOTE:** If there are no transactions awaiting approval, the following message will be displayed - *No transactions found for the specified search criteria*

### To view the approval history of transactions:

1. Enter at least **one** criteria to define the search:
  - **Audit #:** A system generated number. This number will appear on financial statements as the Vendor Invoice number.
  - **Banner Doc #:** Invoice number, starting with IC, assigned once a transaction has been posted to the Ledger.
  - **Cardholder ID:** The McGill ID of the cardholder
  - **Start Date, End Date:** Must be entered in the format DD-MON-YYYY. Recommended to use when searching by Cardholder ID or Audit #
  - **Appl Ref#:** Unique identification number assigned to each issued credit card.
2. Click **List**.
3. Click on the “+” sign in front of a transaction to view approval details/status, such as FOAPAL(s) charged and the associated Approver