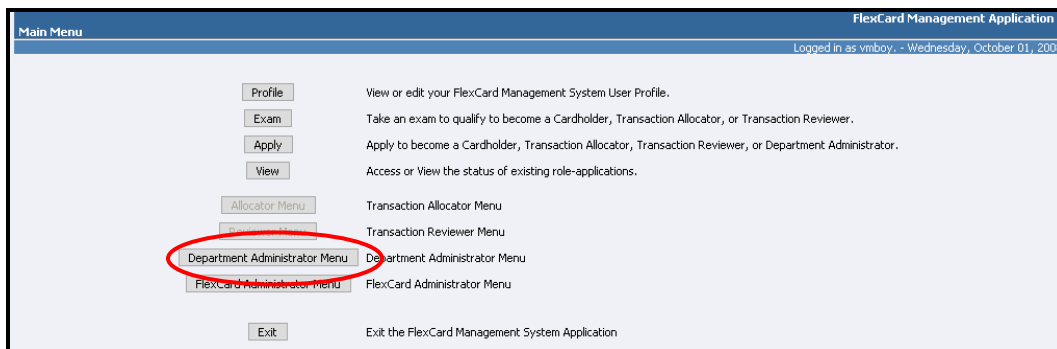


# FLEXCARD MANAGEMENT MODULE DEPARTMENT ADMINISTRATOR REPORTS

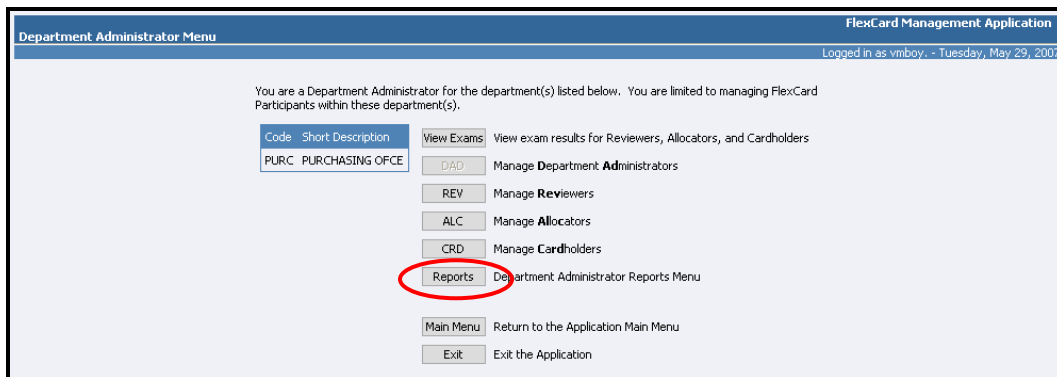
## A. INTRODUCTION

A set of reports have been created in the FlexCard Management Module that provide Department Administrators with information on the program participants within their department (or departments, if they administer more than one department code).

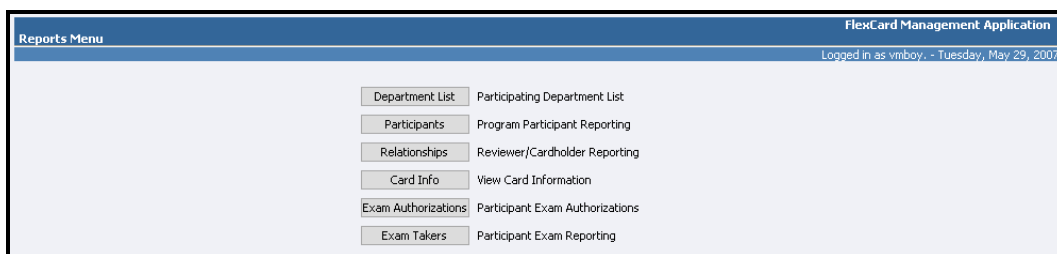
1. On the MAIN MENU, click DEPARTMENT ADMINISTRATOR MENU.



2. On the DEPARTMENT ADMINISTRATOR MENU, click DEPARTMENT ADMINISTRATOR REPORTS MENU.



3. Six reports are available on the REPORTS MENU.



# COMMON FEATURES IN ALL THE REPORTS

The PROGRAM PARTICIPANTS REPORT helps demonstrate these common features.

**1.** Display All Department Codes, Display All Roles, Display All Status Types, Display All Department Descriptions, Display All Names, Sort by Department code

**2.** Page 1 of 2, Set Page / List Size to: 10, Next 6 >, Last Page >>, Participants Found: 16

Department	Description	Role	Participant Name	Home Department	Status
PURC	PURCHASING OFFICE	FlexCard Administrator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	FlexCard Administrator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Department Administrator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Department Administrator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Reviewer	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Reviewer	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Allocator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Allocator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Allocator	Donna Morlock-tucker	PURC	T
PURC	PURCHASING OFFICE	Cardholder	Christopher Curless	PURC	T

**3.** Excel File, HTML File, Text File

**4.** Reset, Reports Menu, FLEX-DAD Menu, Main Menu, Exit

## 1. Display and Sort Options

Most reports have several display options. The default displays ALL choices for each parameter, but the Department Administrator can set more restrictive limits in one or more of them. In order to view the possible display options, click the dropdown arrow next to the parameter.

Display Department Cardholders, Display All Roles, Display FlexCard Administrators, Display Department Administrators, Display Department Reviewers, Display Department Allocators, Display Department Cardholders, Display FlexCard Auditors

For example, you may wish to view only the Cardholders within your department.

Department	Description	Role	Participant Name	Home Department	Status
PURC	PURCHASING OFFICE	Cardholder	Christopher Curless	PURC	T
PURC	PURCHASING OFFICE	Cardholder	Diana Kunze Mina	PURC	A
PURC	PURCHASING OFFICE	Cardholder	Scott Mackenzie	PURC	I
PURC	PURCHASING OFFICE	Cardholder	Donna Morlock-tucker	PURC	T
PURC	PURCHASING OFFICE	Cardholder	Monica Yamasaki	PURC	A

Sort options may also be changed, by choosing one of the options available under the SORT BY parameter. In the following example, the sort is by PARTICIPANT NAME. Each time there is a change in Participant Name, the row background shade color alternates, in order to provide an easy visual clue.

FlexCard Management Application  
 Logged in as vmboy. - Tuesday, September 28, 2010

Display All Department Codes    Display Department Cardholders    Display All Status Types  
 Display All Department Descriptions    Display All Names    **Sort by Participant Name**

Page 1 of 1    Set Page / List Size to: 10    Participants Found: 5

Department	Description	Role	Participant Name	Home Department	Status
PURC	PURCHASING OFFICE	Cardholder	Christopher Curless	PURC	T
PURC	PURCHASING OFFICE	Cardholder	Diana Kunze Mina	PURC	A
PURC	PURCHASING OFFICE	Cardholder	Scott Mackenzie	PURC	I
PURC	PURCHASING OFFICE	Cardholder	Donna Morlock-tucker	PURC	T
PURC	PURCHASING OFFICE	Cardholder	Monica Yamasaki	PURC	A

When the full Participant Report is sorted by PARTICIPANT NAME, the shaded rows do not alternate in color quite so neatly, because several participants fill more than one role.

FlexCard Management Application  
 Logged in as vmboy. - Tuesday, September 28, 2010

Display All Department Codes    Display All Roles    Display All Status Types  
 Display All Department Descriptions    Display All Names    Sort by Participant Name

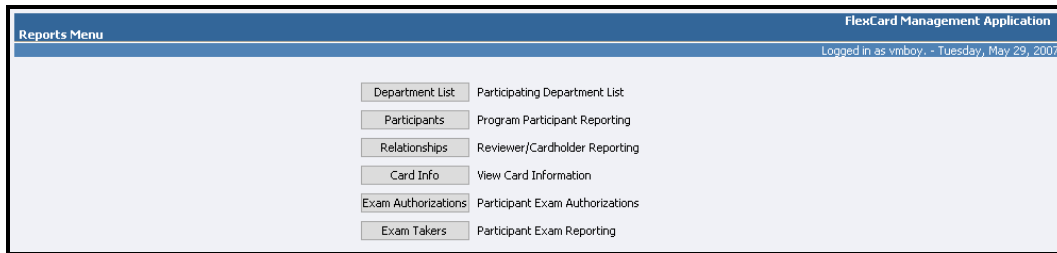
Page 1 of 1    Set Page / List Size to: 20    Participants Found: 16

Department	Description	Role	Participant Name	Home Department	Status
PURC	PURCHASING OFFICE	FlexCard Administrator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Department Administrator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Reviewer	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Allocator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Auditor	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Cardholder	Christopher Curless	PURC	T
PURC	PURCHASING OFFICE	FlexCard Administrator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Department Administrator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Reviewer	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Allocator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Auditor	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Cardholder	Diana Kunze Mina	PURC	A
PURC	PURCHASING OFFICE	Cardholder	Scott Mackenzie	PURC	I
PURC	PURCHASING OFFICE	Allocator	Donna Morlock-tucker	PURC	T
PURC	PURCHASING OFFICE	Cardholder	Donna Morlock-tucker	PURC	T
PURC	PURCHASING OFFICE	Cardholder	Monica Yamasaki	PURC	A



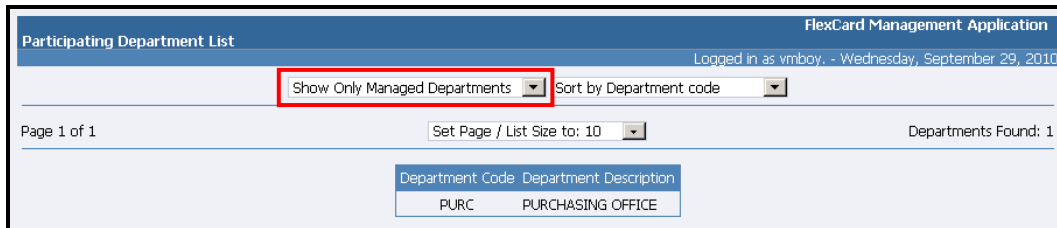
## B. THE DEPARTMENT ADMINISTRATOR REPORTS

Six report options are available for Department Administrators.

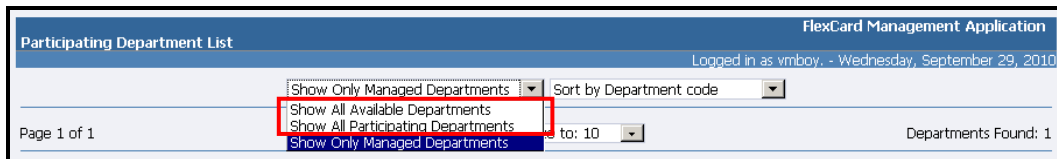


### 1. PARTICIPATING DEPARTMENT LIST

When this report is selected, the initial display is only of the department(s) administered by the individual who has logged onto the Management Module: **SHOW ONLY MANAGED DEPARTMENTS**. In most cases, only one Department (Code) is displayed.



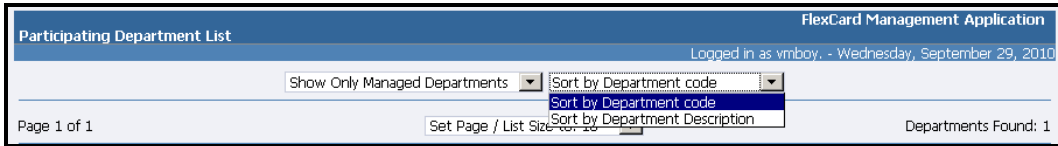
If you click the dropdown arrow, you are presented with two more options:



- SHOW ALL AVAILABLE DEPARTMENTS** – displays all department codes currently active in the UCSB Chart of Accounts
- SHOW ALL PARTICIPATING DEPARTMENTS** – displays all department codes that have had participants in the FlexCard program (not all may be currently active)

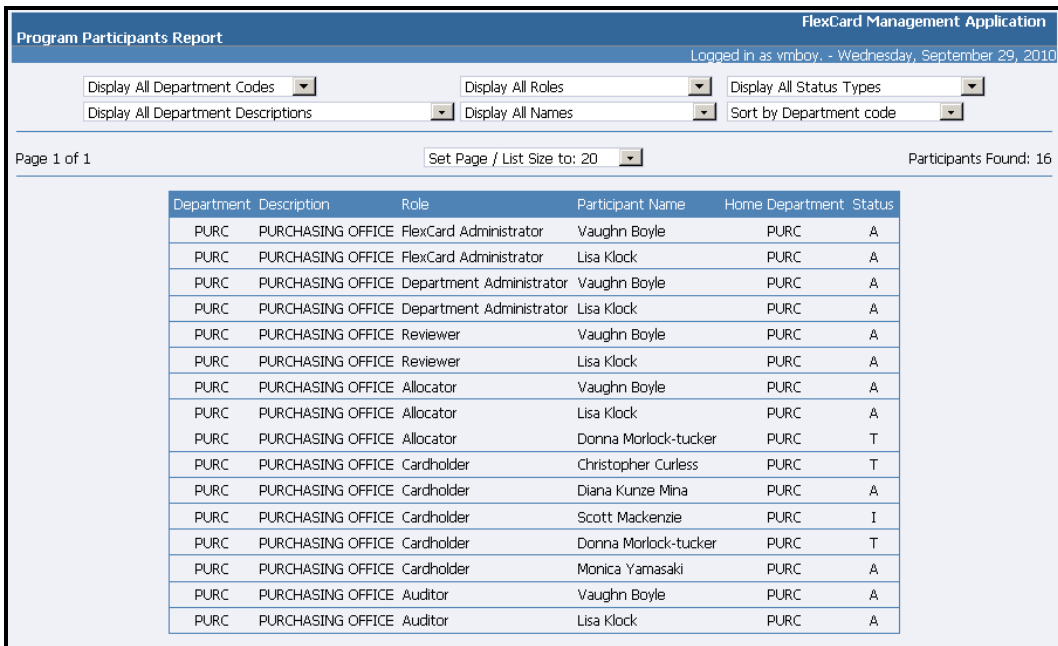
**NOTE:** *The Participating Department List report is the only one of the six reports that displays information for departments other than those managed by the Department Administrator; all other reports, of program participants, cardholder information, exams, etc. are restricted by Department Code.*

In addition to the default SORT BY DEPARTMENT CODE, the list may be sorted by DEPARTMENT DESCRIPTION; this can be helpful when viewing the list of all participating departments and looking for one like Human Resources, where the Department Code, PERS, does not match the department name.

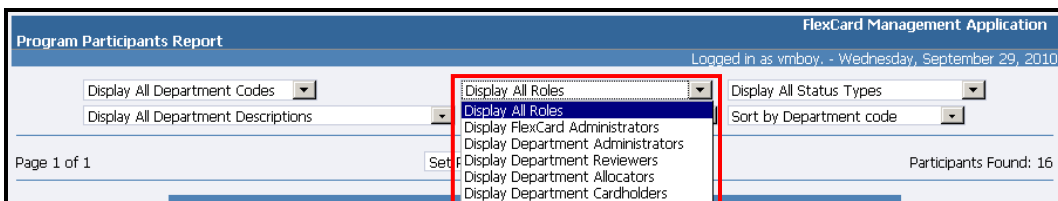


## 2. PROGRAM PARTICIPANTS REPORT

The Program Participants Report has five display parameter options, in addition to different sort choices. The initial view is of ALL possible options, but it may be restricted /refined by changing one or more display options.



- a. If you administer multiple DEPARTMENT CODES (and thus multiple DEPARTMENT DESCRIPTIONS), you can choose to display only participants listed under a single code or description.
- b. You may wish to display only one ROLE – Cardholders, for example.



- c. Or you may wish to display the record(s) for only one participant.

FlexCard Management Application  
Logged in as vmboy. - Wednesday, September 29, 2010

Display All Department Codes | Display All Roles | Display All Status Types  
 Display All Department Descriptions | Display All Names | Sort by Department code

Page 1 of 1 | Set Page / List Size to: 20 | Participants Found: 16

Department	Description	Role	Home Department	Status
PURC	PURCHASING OFFICE	FlexCard	PURC	A

- d. Especially as the years pass and there is turnover within your department's FlexCard program, you may wish to restrict the view by STATUS TYPE to only Active Authorizations (Participants).

FlexCard Management Application  
Logged in as vmboy. - Wednesday, September 29, 2010

Display All Department Codes | Display All Roles | Display Only Active Authorizations  
 Display All Department Descriptions | Display All Names | Sort by Department code

Page 1 of 1 | Set Page / List Size to: 20 | Participants Found: 16

In the following view, the initial display of ALL Program Participants has been restricted to only ACTIVE ones, and the sort has been changed to BY PARTICIPANT NAME.

FlexCard Management Application  
Logged in as vmboy. - Wednesday, September 29, 2010

Display All Department Codes | Display All Roles | Display Only Active Authorizations  
 Display All Department Descriptions | Display All Names | Sort by Participant Name

Page 1 of 1 | Set Page / List Size to: 20 | Participants Found: 12

Department	Description	Role	Participant Name	Home Department	Status
PURC	PURCHASING OFFICE	FlexCard Administrator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Department Administrator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Reviewer	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Allocator	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	Auditor	Vaughn Boyle	PURC	A
PURC	PURCHASING OFFICE	FlexCard Administrator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Department Administrator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Reviewer	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Allocator	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Auditor	Lisa Klock	PURC	A
PURC	PURCHASING OFFICE	Cardholder	Diana Kunze Mina	PURC	A
PURC	PURCHASING OFFICE	Cardholder	Monica Yamasaki	PURC	A

**NOTE:** If you select display parameters that correspond to no participants, no records are displayed and the message "CURRENTLY, NO PARTICIPANT RECORDS EXIST" appears.

FlexCard Management Application  
Logged in as vmboy. - Wednesday, September 29, 2010

Display All Department Codes | Display FlexCard Auditors | Display Only Inactive Authorizations  
 Display All Department Descriptions | Display All Names | Sort by Participant Name

Currently, no Participant records exist.

### 3. REVIEWER / CARDHOLDER REPORTING

The “Relationships” button takes you to the Reviewer / Cardholder report, which shows the groupings of Reviewers and Cardholders within your department. The initial view is sorted by Reviewer and lists each Reviewer with the Cardholder(s) specifically assigned to him/her.

The screenshot shows the 'Reviewer/Cardholder Reporting' page in the FlexCard Management Application. The interface includes several filters: 'Display All Department Codes', 'Display All Department Descriptions', 'Display Reviewers to Cardholders', 'Display All Names', and 'Sort by Department code'. The page indicates 'Page 1 of 1', 'Set Page / List Size to: 10', and 'Participants Found: 2'. The table below lists two reviewers and their assigned cardholders.

Reviewer Name	Home Dept Code	Home Department Description	Cardholder Name	Home Dept Code	Home Department Description	Card Last Four Nbr	Card Expiration Date	Card Dept
Vaughn Boyle	PURC	PURCHASING OFFICE	Diana Kunze Mina	PURC	PURCHASING OFFICE	6857	01/31/2013	PURC
Lisa Klock	PURC	PURCHASING OFFICE	Diana Kunze Mina	PURC	PURCHASING OFFICE	6857	01/31/2013	PURC

You may change the display to sort the list by Cardholder, showing how many Reviewers are assigned to each Cardholder.

The screenshot shows the 'Reviewer/Cardholder Reporting' page with the 'Display Cardholders to Reviewers' filter selected. The table is now sorted by Cardholder, showing two cardholders and the reviewers assigned to them.

Cardholder Name	Home Dept Code	Home Department Description	Card Last Four Nbr	Card Expiration Date	Card Dept	Reviewer Name	Home Dept Code	Home Department Description
Diana Kunze Mina	PURC	PURCHASING OFFICE	6857	01/31/2013	PURC	Vaughn Boyle	PURC	PURCHASING OFFICE
Diana Kunze Mina	PURC	PURCHASING OFFICE	6857	01/31/2013	PURC	Lisa Klock	PURC	PURCHASING OFFICE

If a Cardholder’s name does not appear, it indicates that no Reviewer is assigned to him/her – this may happen when the original Reviewer leaves and a new one is set up but not specifically assigned to the existing Cardholder. While the new Reviewer can perform all functions within the Allocation Module, he/she will NOT receive email notifications of new transactions unless paired with the Cardholder. Therefore, it is important to check these relationships periodically. This is more easily done by using the CARDHOLDERS WITHOUT REVIEWERS report described below but can be determined using this report. If it is limited to a specific Cardholder with no Reviewer, the “CURRENTLY NO PARTICIPANT RECORDS EXIST” message appears.

The screenshot shows the 'Reviewer/Cardholder Reporting' page with the 'Display Cardholders to Reviewers' filter selected and a specific cardholder filter 'Display Only Curless, Christopher'. The table area is empty, and a message at the bottom states: 'Currently, no Participant records exist.'

## 4. CARDHOLDER REPORTS

The “Card Info” button takes you to the Cardholders Reports submenu, containing three reports related to Cardholders.

### A. SIMPLE LIST OF CARDHOLDER ENTRIES

The Simple List of Cardholder Entries displays basic information for all Cardholders managed by the Department Administrator, including:

- a. Name
- b. Home Department
- c. Employee Number (blacked out)
- d. Card Account Number Last Four (blacked out)
- e. Card Expiration Date
- f. Card Default Account/Fund/Sub/Object Code
- g. Card Single Transaction Limit
- h. Card Monthly Limit
- i. Card Status

Participant Name	Home Dept	Home Description	Employee Number	Name on Card	Description on Card	Card Dept	Card Description	Card Four	Card Expiration Date	Card Default LAFSO	Single Transaction Limit	Card Cycle Limit	Card Status
Barrios, David	MAIL	MAIL ROOM		David J Barrios	Central Receiving	MAIL	MAIL ROOM		02/28/2012	8-721515 -19900-3 -8000	\$2,500.00	\$10,000.00	Active
Cuellar, Milinda	MAIL	MAIL ROOM		Milinda Cuellar	Mal Services	MAIL	MAIL ROOM		02/28/2012	8-721515 -19900-3 -8000	\$5,000.00	\$10,000.00	Active
Goldmann, Jeff	STOR	CENTRAL STORES		Jeff Goldmann	Central Stores	STOR	CENTRAL STORES		08/31/2012	8-721537 -66060-3 -8000	\$5,000.00	\$25,000.00	Active
Jeffers, Karen	STOR	CENTRAL STORES		Karen Jeffers	Central Stores	STOR	CENTRAL STORES		08/31/2012	8-721535 -66060-5 -8000	\$5,000.00	\$25,000.00	Active
Kunze Mina, Diana	PURC	PURCHASING OFFICE		Diana Kunze Mina	Purchasing	PURC	PURCHASING OFFICE		01/31/2013	8-661555 -19900-3 -8000	\$5,000.00	\$20,000.00	Active

The report has six display parameter options, in addition to different sort choices. The initial view is of ALL ACTIVE Cardholders, but it may be restricted /refined by changing one or more display options.

- a. If you administer multiple DEPARTMENT CODES (and thus multiple DEPARTMENT DESCRIPTIONS), you can choose to display only participants listed under a single code or description.
- b. If your Cardholders have different TRANSACTION and/or monthly CYCLE LIMITS, all the limits will be available under the two display dropdown menus. You can display only Cardholders with the basic \$2,500 per transaction limit, or those who have attended Purchasing 101 and who have a \$5,000 limit.

You can combine TRANSACTION and CYCLE LIMITS and show, for example, only Cardholders with \$5,000/transaction and \$20,000/month limits.

Program Participants Report | FlexCard Management Application | Logged in as vmb0y - Tuesday, October 05, 2010

Display All Department Codes | Display All Card Transaction Limits: \$5,000.00 | Display All Names | Reset Table  
 Display All Department Descriptions | Display All Card Cycle Limits: \$25,000.00 | Display Only Active Cards | Sort by Cardholder Name

Page 1 of 1 | Set Page / List Size to: 10 | Participants Found: 2

Participant Name	Home Dept	Home Department Description	Employee Number	Name on Card	Description on Card	Card Dept	Card Department Description	Card Last Four	Card Expiration Date	Card Default LAFSO	Single Transaction Limit	Card Cycle Limit	Card Status
Goldmann, Jeff	STOR	CENTRAL STORES		Jeff Goldmann	Central Stores	STOR	CENTRAL STORES		08/31/2012	8-721537-66060-3-8000	\$5,000.00	\$25,000.00	Active
Jeffers, Karen	STOR	CENTRAL STORES		Karen Jeffers	Central Stores	STOR	CENTRAL STORES		08/31/2012	8-721535-66060-5-8000	\$5,000.00	\$25,000.00	Active

- c. You can view record(s) for only one Cardholder NAME, though this option would be useful only rarely, perhaps if a Cardholder has had several cards.
- d. You can choose to display cards whose STATUS is INACTIVE, or ALL statuses, as in the following example.

Program Participants Report | FlexCard Management Application | Logged in as vmb0y - Tuesday, October 05, 2010

Display All Department Codes | Display All Card Transaction Limits | Display All Names | Reset Table  
 Display All Department Descriptions | Display All Card Cycle Limits | Display All Status Types | Sort by Cardholder Name  
 Display Only Active Cards  
 Display Only Inactive Cards

Page 1 of 1 | Set Page / List Size to: 10 | Participants Found: 10

Participant Name	Home Dept	Home Department Description	Employee Number	Name on Card	Description on Card	Card Dept	Card Department Description	Card Last Four	Card Expiration Date	Card Default LAFSO	Single Transaction Limit	Card Cycle Limit	Card Status
Barrios, David	MAIL	MAIL ROOM		David J Barrios	Central Receiving	MAIL	MAIL ROOM		02/28/2012	8-721515-19900-3-8000	\$2,500.00	\$10,000.00	Active
Cuellar, Milinda	MAIL	MAIL ROOM		Milinda Cuellar	Mail Services	MAIL	MAIL ROOM		02/28/2012	8-721515-19900-3-8000	\$5,000.00	\$10,000.00	Active
Curless, Christopher	PURC	PURCHASING OFFICE		Chris P. Curless	Purchasing/Strategic	PURC	PURCHASING OFFICE		07/31/2010	8-661555-67319-3-8000	\$2,500.00	\$10,000.00	Inactive
Goldmann, Jeff	STOR	CENTRAL STORES		Jeff Goldmann	Closed - Fraud	STOR	CENTRAL STORES		08/31/2009	8-721537-66060-3-8000	\$5,000.00	\$25,000.00	Inactive
Goldmann, Jeff	STOR	CENTRAL STORES		Jeff Goldmann	Central Stores	STOR	CENTRAL STORES		08/31/2012	8-721537-66060-3-8000	\$5,000.00	\$25,000.00	Active
Jeffers, Karen	STOR	CENTRAL STORES		Karen Jeffers	Central Stores	STOR	CENTRAL STORES		08/31/2012	8-721535-66060-5-8000	\$5,000.00	\$25,000.00	Active
Kunze Mina, Diana	PURC	PURCHASING OFFICE		Diana Kunze Mina	Purchasing	PURC	PURCHASING OFFICE		01/31/2013	8-661555-19900-3-8000	\$5,000.00	\$20,000.00	Active
Mackenzie, Scott	PURC	PURCHASING OFFICE		Scott Mac Kenzie	Sustainability	PURC	PURCHASING OFFICE		07/31/2009	8-661555-19900-5-8000	\$2,500.00	\$10,000.00	Inactive
Morlock-tucker, Donna	PURC	PURCHASING OFFICE		DONNA MORLOCK-TUCKER	PURCHASING	PURC	PURCHASING OFFICE		01/31/2011	8-661555-19900-3-8000	\$5,000.00	\$20,000.00	Inactive
Yamasaki, Monica	PURC	PURCHASING OFFICE		Monica Yamasaki	Purchasing Admin	PURC	PURCHASING OFFICE		10/31/2012	8-661555-19900-3-8000	\$5,000.00	\$20,000.00	Inactive

The SORT order may also be changed, as in the following view of only INACTIVE Cardholders, sorted by DEPARTMENT CODE.

Program Participants Report | FlexCard Management Application | Logged in as vmb0y - Tuesday, October 05, 2010

Display All Department Codes | Display All Card Transaction Limits | Display All Names | Reset Table  
 Display All Department Descriptions | Display All Card Cycle Limits | Display Only Inactive Cards | Sort by Card Department Code

Page 1 of 1 | Set Page / List Size to: 10 | Participants Found: 5

Participant Name	Home Dept	Home Department Description	Employee Number	Name on Card	Description on Card	Card Dept	Card Department Description	Card Last Four	Card Expiration Date	Card Default LAFSO	Single Transaction Limit	Card Cycle Limit	Card Status
Curless, Christopher	PURC	PURCHASING OFFICE		Chris P. Curless	Purchasing/Strategic	PURC	PURCHASING OFFICE		07/31/2010	8-661555-67319-3-8000	\$2,500.00	\$10,000.00	Inactive
Mackenzie, Scott	PURC	PURCHASING OFFICE		Scott Mac Kenzie	Sustainability	PURC	PURCHASING OFFICE		07/31/2009	8-661555-19900-5-8000	\$2,500.00	\$10,000.00	Inactive
Morlock-tucker, Donna	PURC	PURCHASING OFFICE		DONNA MORLOCK-TUCKER	PURCHASING	PURC	PURCHASING OFFICE		01/31/2011	8-661555-19900-3-8000	\$5,000.00	\$20,000.00	Inactive
Yamasaki, Monica	PURC	PURCHASING OFFICE		Monica Yamasaki	Purchasing Admin	PURC	PURCHASING OFFICE		10/31/2012	8-661555-19900-3-8000	\$5,000.00	\$20,000.00	Inactive
Goldmann, Jeff	STOR	CENTRAL STORES		Jeff Goldmann	Closed - Fraud	STOR	CENTRAL STORES		08/31/2009	8-721537-66060-3-8000	\$5,000.00	\$25,000.00	Inactive

**NOTE:** In order to return to the default display of All ACTIVE CARDHOLDERS, at any point, just click the RESET TABLE button.

## B. CARDHOLDERS WITHOUT ENTRIES IN THE AUTHORIZATIONS TABLE

This report should always display the “CURRENTLY, NO PARTICIPANTS RECORDS EXIST” message.

FlexCard Management Application  
Logged in as vmboy. - Tuesday, May 29, 2007

Cardholders without entries in the authorizations table

Display All Department Codes | Display All Card Transaction Limits | Display All Names | Reset Table  
Display All Department Descriptions | Display All Card Cycle Limits | Display Only Active Cards | Sort by Cardholder Name

Currently, no Participant records exist.

Even former Cardholders should have an INACTIVE authorization. If a Cardholder does not have an authorization, active or inactive, a system or user error has occurred (for example, a Department Administrator has mistakenly deleted the authorization of a Cardholder who is on a leave of absence or who has separated).

If an active Cardholder appears on this report, contact Program Administration to correct the situation because a Cardholder without an active authorization, for example, cannot log onto the FlexCard Allocation Module.

## C. CARDHOLDERS WITHOUT REVIEWERS

This report should always display the “CURRENTLY, NO PARTICIPANTS RECORDS EXIST” message.

FlexCard Management Application  
Logged in as vmboy. - Tuesday, May 29, 2007

Cardholders without reviewers

Display All Department Codes | Display All Card Transaction Limits | Display All Names | Reset Table  
Display All Department Descriptions | Display All Card Cycle Limits | Display Only Active Cards | Sort by Cardholder Name

Currently, no Participant records exist.

As noted above under section B.3., each Reviewer should be assigned to a Cardholder(s) whose transactions he/she will review. Without this assignment, the Reviewer will not receive email notifications of transactions requiring attention, though he/she can still log onto the Allocation Module and perform reviews.

Usually, Reviewers are not assigned to Cardholders because of personnel changes within FlexCard. When new Cardholders are created, Reviewers must be assigned. But, if the original Reviewer separates, and a new one is set up, there is no automatic pairing with the existing Cardholder: the Department Administrator must manually make the assignment, by going to the MANAGE REVIEWERS menu and then the ASSIGN CARDHOLDER TO REVIEWERS submenu and pairing the new Reviewer with the existing Cardholder.

If a Cardholder's name appears on this report, as in the following example, Department Administrator should process the Reviewer to Cardholder assignment as described above.

Participant Name	Home Dept	Department Description	Employee Number	Name on Card	Description on Card	Card Dept	Card Department Description	Card Last Four	Card Expiration Date	Card Default LAFSO	Single Transaction Limit	Card Cycle Limit	Card Status
Kunze Mina, Diana	PURC	PURCHASING OFFICE		Diana Kunze Mina	Purchasing	PURC	PURCHASING OFFICE		01/31/2013	8-661555 -19900-3 -8000	\$5,000.00	\$20,000.00	Active

## 5. EXAM AUTHORIZATIONS

The Exam Authorizations Report (the header information on the report shown below is not correct), displays the exam status of all FlexCard program participants managed by the Department Administrator. Each Exam Type (Cardholder or Reviewer/Allocator), the Date Passed and the Date Expires (Expired) are displayed for each participant. For ease of determining which participants have expired exams, those records are shaded pink, as shown below.

Last Name	First Name	Employee ID	Home Department	Department Name	Exam Type	Date Passed	Date Expires
Boyle	Vaughn		PURC	PURCHASING OFFICE	C	03/31/2008	03/31/2009
Boyle	Vaughn		PURC	PURCHASING OFFICE	R	02/01/2010	02/28/2011
Curless	Christopher		PURC	PURCHASING OFFICE	C	07/03/2008	07/31/2009
Klack	Lisa		PURC	PURCHASING OFFICE	C	02/10/2010	02/28/2011
Klack	Lisa		PURC	PURCHASING OFFICE	R	05/04/2010	05/31/2011
Kunze Mina	Diana		PURC	PURCHASING OFFICE	C	01/06/2010	01/31/2011
Kunze Mina	Diana		PURC	PURCHASING OFFICE	R	01/30/2007	01/31/2008
Mackenzie	Scott		PURC	PURCHASING OFFICE	C	07/17/2006	07/31/2007
Morlock-tucker	Donna		PURC	PURCHASING OFFICE	C	12/10/2008	12/31/2009
Morlock-tucker	Donna		PURC	PURCHASING OFFICE	R	02/02/2006	02/28/2007
Yamasaki	Monica		PURC	PURCHASING OFFICE	C	10/28/2009	10/31/2010

The report has six display parameter options, in addition to different sort choices. The initial view is of ALL EXAM TYPES and (PARTICIPANT) NAMES, but it may be restricted /refined by changing one or more display options.

- If you administer multiple DEPARTMENT CODES (and thus multiple DEPARTMENT DESCRIPTIONS), you can choose to display only participants listed under a single code or description.
- You can restrict the view to only one EXAM TYPE, Cardholder or Reviewer/Allocator.
- You can view the records for only one (PARTICIPANT) NAME, though this option is not really necessary: each participant can have no more than two exam type records.

- d. You can select for only NON-EXPIRED or, as shown below, EXPIRED EXAMS.

The screenshot shows the 'Exam Takers Report' interface with several filter dropdowns. The 'Display All Exam Types' dropdown is set to 'C'. The 'Display All Exam Expirations' dropdown is highlighted with a red box, and its menu is open, showing options: 'Display Only Expired Exams', 'Display All Exam Expirations', 'Display Only Expired Exams', and 'Display Only Non-Expired Exams'. The table below shows exam data for participants in the PURC department.

Last Name	First Name	Employee ID	Home Department	Department Name	Exam Type	Date Passed	Date Expires
Boyle	Vaughn		PURC	PURCHASING OFFICE	C	03/31/2008	03/31/2009
Curless	Christopher		PURC	PURCHASING OFFICE	C	07/03/2008	07/31/2009
Kunze	Mina Diana		PURC	PURCHASING OFFICE	R	01/30/2007	01/31/2008
Mackenzie	Scott		PURC	PURCHASING OFFICE	C	07/17/2006	07/31/2007
Morlock-tucker	Donna		PURC	PURCHASING OFFICE	C	12/10/2008	12/31/2009
Morlock-tucker	Donna		PURC	PURCHASING OFFICE	R	02/02/2006	02/28/2007

- e. You can also choose by EXAM EXPIRATION DATE, though this option is not especially useful.

## 6. EXAM TAKERS

The Exam Takers Report lists all exam attempts – pass, fail and incomplete for each program participant within the departments managed by the Department Administrator. Because exams must be retaken every year, this report can quickly become quite long. Therefore, making use of its five displays parameters can be very important in producing an easily readable and useable list.

The screenshot shows the 'Exam Takers Report' interface with filters set to 'Display Only Home Department Code BUSS' and 'Display Passed and Non-Passed Exams'. The table below shows a detailed list of exam attempts for participants in the BUSS department, including Name, Employee Number, Home Dept, Department Name, Exam Type, Exam Number, Exam Date, Score, and Status.

Name	Employee Number	Home Dept	Department Name	Exam Type	Exam Number	Exam Date	Score	Status
Levy, Jill		BUSS	BUSINESS SERVICES OFFICE	C	6	12/14/2005 9:35AM	19	Pass
Levy, Jill		BUSS	BUSINESS SERVICES OFFICE	C	9	12/12/2006 12:29PM	20	Pass
Levy, Jill		BUSS	BUSINESS SERVICES OFFICE	C	31	11/29/2007 12:32PM	17	Fail
Levy, Jill		BUSS	BUSINESS SERVICES OFFICE	C	32	11/29/2007 12:47PM	19	Pass
Levy, Jill		BUSS	BUSINESS SERVICES OFFICE	R	18	07/03/2007 11:38AM	20	Pass
Lombardo, Pamela		BUSS	BUSINESS SERVICES OFFICE	R	18	06/30/2006 2:04PM	19	Pass
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	C	9	06/22/2006 1:47PM	-1	Not Completed
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	C	10	06/22/2006 2:03PM	16	Fail
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	C	16	06/22/2006 2:12PM	20	Pass
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	C	17	02/15/2007 3:36PM	19	Pass
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	C	31	02/05/2008 10:48AM	19	Pass
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	R	18	02/22/2006 10:08AM	14	Fail
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	R	22	02/22/2006 10:24AM	19	Pass
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	R	25	02/15/2007 3:44PM	18	Pass
Manfredonia, Nicholas		BUSS	BUSINESS SERVICES OFFICE	R	36	02/05/2008 10:57AM	18	Pass

- a. If you administer multiple DEPARTMENT CODES (and thus multiple DEPARTMENT DESCRIPTIONS), you can choose to display only participants listed under a single code or description.

- b. You can restrict the view to only one EXAM TYPE, Cardholder or Reviewer/Allocator.
- c. You can choose to view only PASSED or NON-PASSED exams, for all or other combinations of participants and exam types.
- d. You can view the records for only one (PARTICIPANT) NAME, which can be helpful if you wish to review a single individual's exam record – how many failed exams before a successful exam was recorded, for example, which could indicate individuals needing refresher training.

Exam Takers Report

FlexCard Management Application  
Logged in as vmb0y - Tuesday, October 05, 2010

Display All Department Codes    Display All Exam Types    Display Only Name Barrios, David  
 Display All Department Descriptions    Display Passed and Non-Passed Exams    Sort by Home Department code

Page 1 of 1    Set Page / List Size to: 100    Participants Found: 7

Name	Employee Number	Home Dept	Department Name	Exam Type	Exam Number	Exam Date	Score	Status
		MAIL	MAIL ROOM	C	9	02/22/2006 11:04AM	19	Pass
		MAIL	MAIL ROOM	C	10	02/26/2007 9:15AM	20	Pass
		MAIL	MAIL ROOM	C	31	02/26/2008 2:11PM	19	Pass
		MAIL	MAIL ROOM	C	47	02/03/2009 10:40AM	16	Fail
		MAIL	MAIL ROOM	C	48	02/04/2009 8:20AM	19	Pass
		MAIL	MAIL ROOM	C	52	02/01/2010 10:14AM	13	Fail
		MAIL	MAIL ROOM	C	53	02/01/2010 10:33AM	18	Pass

## APPENDIX – EXAM RESULTS

If a Department Administrator wishes to see the question by question answers to any exam, passed or failed, by a program participant, he or she must access the result via a different menu.

1. Return to the **Department Administrator** main menu and click VIEW EXAMS.

Department Administrator Menu

FlexCard Management Application  
Logged in as vmb0y - Tuesday, October 05, 2010

You are a Department Administrator for the department(s) listed below. You are limited to managing FlexCard Participants within these department(s).

Code	Short Description	View Exams	Description
MAIL	MAIL ROOM	<b>View Exams</b>	View exam results for Reviewers, Allocators, and Cardholders
		DAD	Manage Department Administrators
PURC	PURCHASING OFCE	REV	Manage Reviewers
STOR	CENTRAL STORES	ALC	Manage Allocators
		CRD	Manage Cardholders
		Reports	Department Administrator Reports Menu
		Main Menu	Return to the Application Main Menu
		Exit	Exit the Application

2. On the **Exam** menu, click EXAM RESULTS.

Exam Menu

FlexCard Management Application  
Logged in as vmb0y - Tuesday, October 05, 2010

Qualifications	View active / expired qualifications
<b>Exam Results</b>	View exam results
Department Administrator Menu	Return to the Department Administrator Menu
Main Menu	Return to the Application Main Menu
Exit	Exit the Application

- On the **View Exam History** menu, click VIEW next to the appropriate Program Participant's name.

FlexCard Management Application  
Logged in as vmboy, - Tuesday, October 05, 2010

Sort by Name

Last Name	First Name	Home Department	Action
Barrios	David	MAIL	<a href="#">View</a>
Boyle	Vaughn	PURC	<a href="#">View</a>
Cuellar	Milinda	MAIL	<a href="#">View</a>
Curless	Christopher	PURC	<a href="#">View</a>

- Click VIEW next to the specific exam whose results you wish to review.

FlexCard Management Application  
Logged in as vmboy, - Tuesday, October 05, 2010

Exam Date	Employee ID	Exam Type	Exam Number	Exam Score	Status	Last Name	First Name	Home Department	Action
Wednesday 06 January 2010 11:13AM	875284090	C	52	20	Pass			PURC	<a href="#">View</a>
Tuesday 30 January 2007 10:22AM	875284090	R	18	20	Pass			PURC	<a href="#">View</a>
Tuesday 30 January 2007 10:30AM	875284090	R	25	19	Pass			PURC	<a href="#">View</a>
Tuesday 30 January 2007 10:30AM	875284090	R	22	-1	Not Completed			PURC	<a href="#">View</a>

- The exam results are displayed, question by question. Any incorrect answers are shaded pink, the correct and recorded answers displayed.

FlexCard Management Application  
Logged in as vmboy, - Tuesday, October 05, 2010

Exam Date: Tuesday 03 February 2009 10:40AM Exam Number: 47

Order	Question Number	Exam Type Question Type Category SubCategory	Question	Possible Answers	Correct Answer	Recorded Answer
1	1033	Cardholder True/False Policies General Questions	All merchants will accept the FlexCard.	True / False	F	F
2	1211	Cardholder MultipleChoice Policies Roles and Responsibilities	Who has to take the FlexCard Cardholder Exam?	a: All FlexCard program participants b: All Cardholders c: All Reviewers	b	a
3	1027	Cardholder MultipleChoice Security US Bank	Upon receipt of a new FlexCard, the first thing a Cardholder should do is:	a: Make a purchase using the card b: Contact U.S. Bank to activate the card c: Share the card number with fellow employees	b	b