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 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.

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

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.
2. **List Size Options**

The default list size is 10 rows of information, which for most departments should be sufficient to display all records. Whenever the report is displayed, the total number of found records is displayed to the right of the List Size parameter box.

If the number exceeds 10, there are two ways to view all the data:

a. Page by page, in increments of 10: click the NEXT button to proceed through the report.

b. Expand the List Size sufficiently to display all the rows: click the dropdown arrow and select the appropriate list size.

3. **Data Export Options**

If desired, the information gathered in any report may be exported, as either an Excel, HTML or Text file, by clicking the appropriate button.

Depending upon the browser that you use, and its settings, you may have to configure it to allow pop-ups from the FlexCard Management Module.

If the data exceeds the default display of 10 rows, there is no need to display all rows before exporting the data: the export is always the complete report data.

4. **RESET Button**

If, after changing display and sort options, you wish to return to the original view of the report, simply click RESET at the bottom left of the report.
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:

a. SHOW ALL AVAILABLE DEPARTMENTS – displays all department codes currently active in the UCSB Chart of Accounts

b. 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.

![Image of Program Participants Report with status type filters]

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.

![Image of Program Participants Report with ACTIVE filters]

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

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

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.
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:

- Name
- Home Department
- Employee Number (blacked out)
- Card Account Number Last Four (blacked out)
- Card Expiration Date
- Card Default Account/Fund/Sub/Object Code
- Card Single Transaction Limit
- Card Monthly Limit
- Card Status

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.

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.

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

**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.

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.

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.

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.

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.

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 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.

![Image of Exam Takers Report]

```
<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Employee Number</th>
<th>Home Department Code</th>
<th>Home Department Name</th>
<th>Exam Type</th>
<th>Exam Number</th>
<th>Exam Code</th>
<th>Score</th>
<th>Status</th>
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</tr>
</tbody>
</table>
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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 usable list.

```
<table>
<thead>
<tr>
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<td>02/06/2008 10:57AM</td>
<td>18</td>
<td>Pass</td>
</tr>
</tbody>
</table>
```

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.

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.

2. On the Exam menu, click EXAM RESULTS.
3. On the **View Exam History** menu, click VIEW next to the appropriate Program Participant’s name.

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

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