Procurement Card Retrieval Documentation

Welcome to the Procurement Card Retrieval Course. Sign in to the PeopleSoft Financials application with your User ID and Password

*The PeopleSoft P-Card Module*

Sign in to the PeopleSoft Financials application:

Use the menu to navigate to the P-Card Submission page by clicking on CU_CUSTOM, P-Card, and P-Card Submission.
You may search by card number, card holder name or status.

By choosing a status without further specifying card number or card holder, all transactions for the liaison’s selected status will appear regardless of the cardholder.

If you click on Search without entering any information, all items for all cards will appear for a 180 day period.

To see all unfinished transactions for a specific card, the card number must be entered and ‘Unfinished’ will need to be selected for the DPV Action Status.

Once the search results are shown, Click the Transaction Entry to bring up the EDIT/SUBMIT page.
Enter Contract/Exemption number(s) if applicable (Not Shown)
If an invalid chartfield is submitted, an error will result and the field will be highlighted:

Select county of delivery if sales tax was not collected on the charge and the item is taxable.

Fields become read only after submission:
Viewing/Printing Submitted Transactions

Select the submitted status on the search page:

**P-Card Submission**
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CU Card Number</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>CU Card Holder Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>DPV Action Status</td>
<td>=</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

To avoid listing multiple cards, enter the card criteria as shown below:

**P-Card Submission**
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CU Card Number</td>
<td>contains</td>
<td>0026</td>
</tr>
</tbody>
</table>

To avoid printing the card number, change the search criteria to "contains" and enter the last four digits.
Once the submitted list is brought up, use the menu option File->Print (or Ctrl+P) to print the list:

**P-Card Submission**
Enter any information you have and click Search. Leave fields blank for a list of all values.

- **CU Card Number:** contains 0991
- **CU Card Holder Name:** begins with
- **DPV Action Status:** Submitted

**Search Results**

<table>
<thead>
<tr>
<th>CU Credit Card Number</th>
<th>CU Card Holder Name</th>
<th>DPV Action Status</th>
<th>Description</th>
<th>CU Reference Date</th>
<th>Amount</th>
<th>CU Reference Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>0991</td>
<td>ARNOLD, MARANDA A</td>
<td>Submitted</td>
<td>Sigma-Aldrich</td>
<td>04-JUN-07</td>
<td>$167.85</td>
<td>249921571429069413506329</td>
</tr>
<tr>
<td>0991</td>
<td>ARNOLD, MARANDA A</td>
<td>Submitted</td>
<td>ESUTURES</td>
<td>01-JUN-07</td>
<td>$92.30</td>
<td>242233771429060028373962</td>
</tr>
<tr>
<td>0991</td>
<td>ARNOLD, MARANDA A</td>
<td>Submitted</td>
<td>WIR SCIENTIFIC PROD VCTS</td>
<td>01-JUN-07</td>
<td>$24.90</td>
<td>242333771429064021194574</td>
</tr>
</tbody>
</table>

**Running the P-Card Activity Report**

The P-Card activity report lists all activity for the P-card for a given date range.
Enter a date range for the report. Enter the complete card number or a partial card number enclosed with percentage signs.

Use the default values in the process request and click OK:
Click "OK".

Click **Process Monitor** to monitor the report’s progress:
Click the Refresh button until the process is a success:

Click the **Details** link:
Click on the View Log/Trace link:

Click on the PDF file to view the report:
### Clemson University Purchasing Card Activity by Bank Posting Date

6/1/2007

<table>
<thead>
<tr>
<th>Statement Dt</th>
<th>Acct</th>
<th>Dept</th>
<th>Project</th>
<th>Vendor</th>
<th>Amount</th>
<th>Trans Dt</th>
<th>Trans Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/16/2007</td>
<td>0000</td>
<td>0906</td>
<td>1000000</td>
<td>VWR SCIENTIFIC PROD VCTS</td>
<td>20.61</td>
<td>5/14/2007</td>
<td>0193322113500400001</td>
</tr>
<tr>
<td>5/17/2007</td>
<td>0000</td>
<td>0906</td>
<td>1000000</td>
<td>BIOMEDICAL ENGINEERING S</td>
<td>30.00</td>
<td>5/16/2007</td>
<td></td>
</tr>
<tr>
<td>5/17/2007</td>
<td>0000</td>
<td>0906</td>
<td>1000000</td>
<td>BIOMEDICAL ENGINEERING S</td>
<td>35.00</td>
<td>5/16/2007</td>
<td></td>
</tr>
</tbody>
</table>

*The P-Card Activity Report requires the Adobe Reader.*

*All activity in any status is listed for the date range.*

---

The report footer:

<table>
<thead>
<tr>
<th>Cardholder</th>
<th>Card #</th>
<th>Report provides sign-off and approval</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>7,243.08</td>
</tr>
</tbody>
</table>

**Shows date range for report**


Cardholder Signature ___________________________ Date ___________________________

Approver Signature ___________________________ Date ___________________________
Running the P-Card Submission Report

The P-Card submission report lists all submitted data.

Enter a full card number or partial card number enclosed with two % symbols and click “Run”.

Click “OK”.

Click on “Process Monitor”
Enter card number or partial card number %1234%

*CU Card Number* 

**Click Refresh until the run status is "Success". Then click "Details".**
## Process Detail

### Process

- **Instance:** 213537
- **Type:** Crystal
- **Name:** PCARDSUB
- **Description:** PCARDSUB
- **Run Status:** Success
- **Distribution Status:** Posted

### Run

- **Run Control ID:** 1
- **Location:** Server
- **Server:** PSNTSQR
- **Recurrence:**

### Date/Time

- **Request Created On:** 06/21/2007 9:39:30AM EDT
- **Run Anytime After:** 06/21/2007 9:37:47AM EDT
- **Began Process At:** 06/21/2007 9:39:41AM EDT
- **Ended Process At:** 06/21/2007 9:39:43AM EDT

### Actions

- **Parameters**
- **Transfer**
- **Message Log**
- **Batch Timings**
- **View Log/Trace**

### Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

---

**Click**
The report:

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
<th>Vendor</th>
<th>Contract</th>
<th>Account ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/14/2007</td>
<td>5/14/2007</td>
<td>101</td>
<td>OfficeMax CTIN44957</td>
<td>0240000</td>
<td></td>
</tr>
</tbody>
</table>

Grand Total: 549.78

Contact
CRAWFO5@clemson.edu P-Card Process Administrator
ithelp@clemson.edu for PeopleSoft access or technical issues