

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.

ORACLE Home Worklist MultiChannel Console

Menu

- ▼ P-Card
 - P-Card Submission
 - P-Card Activity Report
 - P-Card Submission Report
 - P-Card Travel Acct Exceptions
- ▷ Restrictions
- ▷ Accounts Payable
- ▷ CU-Business/Security Processes
- ▷ Self-Serve
- ▷ Billing and Receivables
- ▷ CU Custom
- ▷ CU Projects
- ▷ General Ledger
- CU Payroll Corrections
- CU Web Invoice
- CURF Web Invoice
- ▷ Customers
- ▷ Items
- ▷ Vendors

P-Card Submission

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

CU Card Number:

CU Card Holder Name:

Statement Date:

DPV Action Status:

[Basic Search](#)

P-Card Submission

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

CU Card Number:

CU Card Holder Name:

DPV Action Status:

[Basic Search](#)

View only "Unfinished" P-Card data

Search Results

View All First 1-84 of 84 Last

CU Credit Card Number	CU Card Holder Name	DPV Action Status	Description	CU Reference Date	Amount	CU Reference Number
*****9026	DOOLEY, LARRY	Unfinished	AAAS *SCIENCE MAG	11-MAY-07	\$142.00	24692167131000487449763
*****9091	ARNOLD, MARANDA A	Unfinished	E-SUTURES	22-MAY-07	\$92.90	24223697142980002887087
*****9091	ARNOLD, MARANDA A	Unfinished	Sigma-Aldrich	22-MAY-07	\$167.95	24692167142000413506220

Card number masked

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.

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

CU Card Number:

CU Card Holder Name:

DPV Action Status:

[Basic Search](#)

- Pre-Committed
- Processed
- Submitted**
- Unfinished

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

CU Card Number:

CU Card Holder Name:

DPV Action Status:

[Basic Search](#) [Save Search Criteria](#)

To avoid printing the card number, change the search criteria to "contains" and enter the last four digits.

Search Results

View All First 1 of 1 Last

CU Credit Card Number	CU Card Holder Name	DPV Action Status	Description	CU Reference Date	Amount	CU Reference Number
*****9026	DOOLEY, LARRY	Submitted	AAAS *SCIENCE MAG	04-JUN-07	\$142.00	24692167131000487449763

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.

Find an Existing Value

CU Card Number: contains 9091
 CU Card Holder Name: begins with
 DPV Action Status: = Submitted

[Basic Search](#)

Search Results

View All First 1-3 of 3 Last

CU Credit Card Number	CU Card Holder Name	DPV Action Status	Description	CU Reference Date	Amount	CU Reference Number
*****9091	ARNOLD, MARANDA A	Submitted	Sigma-Aldrich	04-JUN-07	\$167.95	24692167142000413506220
*****9091	ARNOLD, MARANDA A	Submitted	E-SUTURES	01-JUN-07	\$92.90	24223697142980002887087
*****9091	ARNOLD, MARANDA A	Submitted	VWR SCIENTIFIC PROD VCTS	01-JUN-07	\$24.96	24233377142004021194578

Running the P-Card Activity Report

The P-Card activity report lists all activity for the P-card for a given date range.

Menu

- ▾ P-Card
 - P-Card Submission
 - **P-Card Activity Report**
 - P-Card Travel Acct Exceptions
- ▾ Accounts Payable
- ▾ General Ledger
- ▾ Billing and Receivables
- ▾ CU Projects
- ▾ Commitment Control
- ▾ Reporting Tools
- ▾ Items
- ▾ Vendors
- ▾ Purchasing
- ▾ Billing
- ▾ Accounts Receivable

Transaction Details:

Ref Number: _____ CU User Id: ANSELT
 Cardholder: _____ Amount \$: 24.96
 Card #: _____ Status: Submitted

Procurement Card Modification Customize | Find

Account	Fund Code	Dept	Program Code	Class Field	Project	EmplID	Amount	Use Tax Code	Description
1	7010	10	0906	201	137	1000000	24.96		VWR SCIENTIFIC PROD VCTS

P-Card Report

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

*From Date

*To Date

Enter card number or partial card number %1234%

*Card Number

All fields are required



Enter a date range for the report. Enter the complete card number or a partial card number enclosed with percentage signs.

P-Card Report

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

*From Date

*To Date

Enter card number or partial card number %1234%

*Card Number

Click the Run button to submit the report



Use the default values in the process request and click OK:

Process Scheduler Request

User ID: ANSELT Run Control ID: 1

Server Name: Run Date: 

Recurrence: Run Time:

Time Zone: 

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PCARDSUB	PCARDSUB	Crystal	Web	PDF	Distribution

Click "OK".

Click **Process Monitor** to monitor the report's progress:

P-Card Report

Run Control ID: 1 [Report Manager](#)

Process Instance:213372

*From Date 

*To Date 

Enter card number or partial card number %1234%

*Card Number

Click the Refresh button until the process is a success:

Process List Server List

View Process Request For

User ID: ANSELT Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status Save On Refresh

Process List Customize Find View All First 1-5 of 5 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	213382		Crystal	PCARD	ANSELT	06/04/2007 10:02:58AM EDT	Queued	N/A	Details

Click the **Details** link:

Process List Server List

View Process Request For

User ID: ANSELT Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status Save On Refresh

Process List Customize Find View All First 1-5 of 5 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	213382		Crystal	PCARD	ANSELT	06/04/2007 10:02:58AM EDT	Success	Posted	Details

Click on the View [Log/Trace](#) link:

Process Detail

Process			
Instance:	213382	Type:	Crystal
Name:	PCARD	Description:	PCARD
Run Status:	Success	Distribution Status:	Posted

Run	Update Process
Run Control ID: 1	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSNTSQR	<input type="radio"/> Cancel Request
Recurrence:	<input checked="" type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 06/04/2007 10:06:11AM EDT	Parameters Transfer
Run Anytime After: 06/04/2007 10:02:58AM EDT	Message Log
Began Process At: 06/04/2007 10:06:31AM EDT	Batch Timings
Ended Process At: 06/04/2007 10:06:35AM EDT	View Log/Trace

OK Cancel

Click on the [PDF](#) file to view the report:

File List		
Name	File Size (bytes)	Datetime Created
Message Log	0	06/01/2007 11:02:10.000000AM EDT
PCARD_213372.PDF 	83,354	06/01/2007 11:02:10.000000AM EDT
PeopleSoft Trace File	473	06/01/2007 11:02:10.000000AM EDT

Distribute To

The report:

**Clemson University
Purchasing Card
Activity by Bank Posting Date**

6/1/2007

Statement Dt	Acct	Dept	Project	Vendor	Amount	Trans Dt	Trans Number
5/16/2007	0000	0906	1000000	VWR SCIENTIFIC PROD VCTS	20.61	5/14/2007	0400000771250040041
5/16/2007	0000	0906	1000000	US PLASTICS/USP HOME	40.30	5/15/2007	0400000771250040041
5/16/2007	0000	0906	1000000	IVG*INVITROGEN CORPORA	127.67	5/15/2007	0400000771250040041
5/16/2007	0000	0906	1000000	FRYS.COM 877-688-7678	312.71	5/15/2007	0400000771250040041
5/17/2007	0000	0906	1000000	OFFICEMAX CT IN#072992	20.99	5/15/2007	0400000771250040041
5/17/2007	0000	0906	1000000	OFFICEMAX CT IN#073021	20.99	5/15/2007	0400000771250040041
5/17/2007	0000	0906	1000000	BIOMEDICAL ENGINEERING S	30.00	5/16/2007	0400000771250040041
5/17/2007	0000	0906	1000000	BIOMEDICAL ENGINEERING S	35.00	5/16/2007	0400000771250040041
5/17/2007	0000	0906	1000000	BIOMEDICAL ENGINEERING S	35.00	5/16/2007	0400000771250040041

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

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

[\(Click here](#) for Adobe Reader)

The report footer:

5/31/2007	7010	0906	1000000	MILLIFORE AMERICAS	14.04	5/31/2007	0400000771250040041
5/31/2007	7010	0906	1000000	THE BOX DEPOT	78.87	5/31/2007	0400000771250040041
Cardholder					Total		
Card #					7,243.08		
						Total for dates:	7,243.08
Reflects PCard Transactions for ANSELT for dates 5/15/2007 through 5/31/2007							

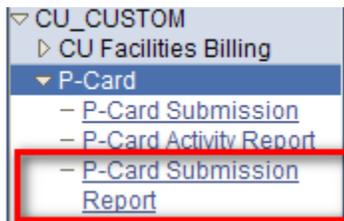
**Shows date range for
report**

**Report provides sign-off and
approval**

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”.

PCard Submitted Rpt

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Enter card number or partial card number %1234%

*CU Card Number

Process Scheduler Request

User ID: ANSELT Run Control ID: 1

Server Name: Run Date: [Reset to Current Date/Time](#)

Recurrence: Run Time: [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Procurement Card Report	PCARD	Crystal	Web	PDF	Distribution

[OK](#) [Cancel](#)

Click “OK”.

Click on “Process Monitor”

PCard Submitted Rpt

Run Control ID: 1

[Report Manager](#)

[Process Monitor](#)

Run

Process Instance:213537

Enter card number or partial card number %1234%

*CU Card Number

Process List

Click Refresh until the run status is "Success". Then click "Details".

View Process Request For

User ID: Type: Last: Days

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List Customize | Find | View All | First 1-3 of 3 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	213537		Crystal	PCARDSUB	ANSELT	06/21/2007 9:37:47AM EDT	Success	Posted	Details
<input type="checkbox"/>	213535		Crystal	PCARDSUB	ANSELT	06/21/2007 9:02:27AM EDT	Success	Posted	Details
<input type="checkbox"/>	213534		Crystal	PCARDSUB	ANSELT	06/21/2007 9:00:32AM EDT	Success	Posted	Details

Process Detail

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

Run	Update Process
Run Control ID: 1	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSNTSQR	<input type="radio"/> Cancel Request
Recurrence:	<input checked="" type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 06/21/2007 9:39:30AM EDT	Parameters Transfer
Run Anytime After: 06/21/2007 9:37:47AM EDT	Message Log
Began Process At: 06/21/2007 9:39:41AM EDT	Batch Timings
Ended Process At: 06/21/2007 9:39:43AM EDT	View Log/Trace

OK	Cancel
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Click

View Log/Trace

Report			
Report ID:	81476	Process Instance:	213537 Message Log
Name:	PCARDSUB	Process Type:	Crystal
Run Status:	Success		

PCARDSUB

Distribution Details

Distribution Node: WinNode Expiration Date: 06/28/2007

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	06/21/2007 9:39:43.000000AM EDT
PCARDSUB_213537.PDF	17,541	06/21/2007 9:39:43.000000AM EDT
PeopleSoft Trace File	473	06/21/2007 9:39:43.000000AM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	ANSELT

Click the PDF file to view the report.

The report:

6/21/2007	Clemson University										ANSELT		
Purchasing Card Submission Report													
Statement Dt	Entry Dt	Acct	Fund	Dept	Prog	Cls	Project	Vendor	Amount	Usetax	EmplID	Contract	Exemption Nbr
6/14/2007	6/14/2007	1101	15	0312	109	130	1500375	OFFICEMAX CT IN#49957	66.88				
6/14/2007	6/14/2007	1101	15	0312	109	130	1500375	NORTHWESTERN SUPPL	397.72				
6/18/2007	6/18/2007	7006	15	0312	109	130	1500375	#FEDEX AB# 838-4975555	17.39	OCONEE			
6/20/2007	6/20/2007	7201	15	0312	109	130	1500375	LOWES #1635	67.80				
<u>Card Number</u>	<u>Cardholder</u>												
*****9286	BYKO, VICKIE L												
											549.79		
Grand Total:											549.79		

Contact

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