# **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:

https://cubsts.clems				
	User ID: Password: Sign In	Select a Languag English Dansk Français Italiano Nederlands	e: Español Deutsch Français du Canada Magyar Norsk	
	To set trace flags, click <u>here</u>	<u>Polski</u> Suomi Čeština 한국머 Thu 繁體中文	Portugués Svenska 日本語 Русский 简体中文 Juguy	

Use the menu to navigate to the P-Card Submission page by clicking on CU\_CUSTOM, P-Card, and P-Card Submission.

ORACI E'				
CICACLE			<u>Home</u>	Worklist MultiChannel Console
Menu 🖃				
– P-Card Submission				
<ul> <li><u>P-Card Activity Report</u></li> <li><u>P-Card Submission</u></li> </ul>	P-Card Submission			
Report	Enter any information you have and cli	ck Search. Leave fields blank	c for a list of all val	ues.
<ul> <li>P-Card Travel Acct</li> </ul>				
Exceptions	Find an Existing Value			
Restrictions	-			
Accounts Payable	CII Card Number			
▷ CU-Business/Security	Co cara Number. begins with			
Processes	CU Card Holder Name: begins with '	I		
Self-Serve	Statement Date: = V		24	
D Billing and Receivables				
	DPV Action Status: = V		~	
> Controjects				
- CLI Payroll Corrections	Search Clear a i a			
- CU Web Invoice	Basic Search	n 📄 Save Search Criteria		
- CURF Web Invoice				
▷ Customers				
▷ Items				
Nondore				

#### P-Card Submission

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

Find an Existing Va	alue								
			View on	lv "Unfinis	hed" F	Card data			
CU Card Number:	begins with 💌		VICW OI	ny Onnina	ncu i				
CU Card Holder Nam	e: begins with ⊻	-							
DPV Action Status:	= 🗸 U	nfinished	~						
Search Clear Basic Search 🗐 Save Search Criteria									
View All						First ┥ 1-84 of 84 🕞 Last			
<u>CU Credit Card</u> <u>Number</u>	U Card Holder Name	DPV Action Status	Description	CU Reference Date	Amount	CU Reference Number			
***********9026	OOLEY, LARRY	<u>Unfinished</u>	AAAS *SCIENCE MAG	11-MAY-07	<u>\$142.00</u>	24692167131000487449763			
***********9091 A	RNOLD, MARANDA A	Unfinished	E-SUTURES	22-MAY-07	<u>\$92.90</u>	24223697142980002887087			
<u>***********9091</u> <u>A</u>	RNOLD, MARANDA A	Unfinished	Sigma-Aldrich	22-MAY-07	<u>\$167.95</u>	24692167142000413506220			

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:

Wind	ows Internet	Explorer							
	Invalid valu	ue press the	prompt button	or hyperlink for a	list of valid valu	es (15,11)			
-	The value (	entered in the	field does not n	natch one of the a	allowable values.	You can see the allowal	ble values by pressing	the Prompt button or hyperlink.	
	ок								
Proc	curement	Card Mo	dification						
	Account	Fund Code	Dept	Program Code	Class Field	Project	EmpliD		
1	000C Q	10 🔍	0906 🔍	201 🔍	137 🔍	1000000 🔍	Q		
		1							
Ŀ	Click t	he pr	ompti	ior a lis	st of va	alid value:	s		

Fields become read only after submission:

	Card #	Field	ls and	butto	n	Sta	tus Submitte	1	Submit This Transaction	
Proc	curement (	disa	bled							<u>Customize</u>   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

# **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 Valu	e		
		_	
CU Card Number:	begins with 🗸		
CU Card Holder Name:	begins with 🗸		
DPV Action Status:	- ~	~	
Search Clear	Basic Search	Pre-Committed Processed Submitted	
		Unfinished	]

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

P-Card Submission	n							
Enter any information yo	u have and click Search. Leave fields bla	nk for a list of all values.						
Find an Existing Valu	e	To ave	To avoid printing the card number,					
CU Card Number:	contains 🖌 9026		ge uie search c	the last four				
CU Card Holder Name:	begins with 👻		ains and enter	the last lour				
DPV Action Status:	= 🗸 Submitted		•					
Search Clear	Basic Search 📳 Save Search Criteria							
Search Results								
View All				First ┥ 1 of 1 🕞 Last				
CU Credit Card Number	CU Card Holder Name DPV Action Status	Description CU R	Reference Date Amount	CU Reference Number				
**********9026	DOOLEY, LARRY Submitted	AAAS *SCIENCE MAG 04-J	JUN-07 \$142.00	24692167131000487449763				

Once the submitted list is brought up, use the menu option <u>File->P</u>rint (or Ctrl+P) to print the list:

P-Card Submission	1										
Enter any information yo	u have and clic	ck Search	. Leave fields blan	k for a list of all values.							
Find an Existing Valu	е										
CU Card Number:	contains	9091									
CU Card Holder Name:	begins with	1									
DPV Action Status:	= 🗸	Subm	itted	*							
Search Clear	<u>Basic Search</u>	E Save	e Search Criteria								
Search Results											
View All							First 🔄 1-3 of 3 🕞 Last				
CU Credit Card Number	CU Card Holde	<u>er Name</u>	DPV Action Status	Description	CU Reference Date	Amount	CU Reference Number				
<u>***********9091</u>	ARNOLD, MAR	<u>RANDA A</u>	Submitted	Sigma-Aldrich	<u>04-JUN-07</u>	\$167.95	24692167142000413506220				
***********9091	ARNOLD, MAR	RANDA A	Submitted	E-SUTURES	01-JUN-07	<u>\$92.90</u>	24223697142980002887087				
<u>***********9091</u>	ARNOLD, MAR	RANDA A	<u>Submitted</u>	VWR SCIENTIFIC PROD VCTS	<u>01-JUN-07</u>	<u>\$24.96</u>	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		Ref	lumber	Clink				CU Use	rld ANSELT	r		
D Accounts Payable		Card	Iholder	CIICK	to ru	nthe		Amou	INT\$ 24.96		_	Run Activity Report
<ul> <li>General Ledger</li> <li>Billing and Receivables</li> </ul>		C	Card #	P-Ca	Γά Αςι	uvity R	ероп	Sta	tus Submitte	ed	1	Submit This Transaction
D CU Projects		Proc	urement	Card Mod	lification							Custamiza   Einc
Commitment Control			urement	E and	incution	<b>D</b>	01					
lens			Account	Fund Code	Dept	Code	Field	Project	EmpliD	Amount	Use Tax Code	Description
<ul> <li>Vendors</li> <li>Purchasing</li> </ul>	Ξ	1	7010	10	0906	201	137	1000000		24.96		VWR SCIENTIFIC PROD VCTS
▷ Billing ▷ Accounts Receivable												

Run Control ID: 1	<u>Report Manager</u>	Process Monitor	R
*From Date			
*To Date			
Enter card number or partial card number %123	All fields ar	e 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		<u>Report Manager</u>	Process Monitor	Run
*From Date *To Date	05/15/2007 🛐 05/31/2007 🛐	Click	be Run butto	on to
		submi	t the report	// 10
Enter card number	or partial card number %1234%			
*Card Number	%094918%			

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

#### Process Scheduler Request

User ID:	ANSELT	Run Co	ontrol ID: 1					
Server Name:	PSNT1 V	Run Date:	07/18/2013	3				
Recurrence:	~	Run Time:	3:09:05PM		Resett	o Current Dat	te/Time	
Time Zone:	Q							
Process List								
Select Description		Process	<u>s Name</u>	Process Ty	<u>rpe</u>	*Түре	*Format	Distribution
PCARDSU	3	PCARD	SUB	Crystal		Web	PDF	<b>Distribution</b>

ОК	Cancel

Click "OK".

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

P-Card Report	
Run Control ID: 1	Run Process Monitor Process Instance:213372
*From Date 05/15/2007 3 *To Date 05/31/2007 3	
Enter card number or partial card number %1234% *Card Number	

Click the Refresh button until the process is a success:

Proce	Process List Server List									
View P	View Process Request For									
User	ID: ANSE	LT	🔍 Туре:			Last: 1 Days	Refres	sh		
Serv	Server: Name: Q Instance: to									
Run Statu	Run Distribution Status Status									
Proce	ss List					Customize   Find   Vie	ew All 📕 🛛 F	First 🖪 1-5 of §	i 🕨 Last	
<u>Select</u>	Instance	<u>Seq.</u>	Process Type	Process Name	<u>User</u>	Run Date/Time	Run Status	Distribution Status	<u>Details</u>	
	213382		Crystal	PCARD	ANSELT	06/04/2007 10:02:58AM EDT	Queued	N/A	<u>Details</u>	

## Click the **Details** link:

Process List Server L	.ist			_			
View Process Request For	r						
User ID: ANSELT	🤍 Туре:		Last: 1 Days	Refres	sh		
Server:	Name:		Q Instance:	to			
Run Status:	Distribution     Status		✓ Save On	Refresh			
Process List	Process List Customize   Find   View All   H First 🗹 1-5 of 5 🕨 Last						
Select Instance Seq. Proc	ess Type <u>Process</u>	<u>User</u>	Run Date/Time	Run Status	Distribution Status	n <u>Details</u>	
213382 Crys	tal PCARD	ANSELT	06/04/2007 10:02:58AM EDT	Success	Posted	<u>Details</u>	

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

Iame:       PCARD       Description: PCARD         Run Status:       Success       Distribution Status: Posted         n       Update Process         Run Control ID: 1       Oueue Request         cocation:       Server         Server:       PSNTSQR         Acctions       Delete Request         Objecter Request       Delete Request         Objecter Request       Restart Request         Request Created On:       06/04/2007 10:06:11AM EDT         Regan Process At:       06/04/2007 10:06:31AM EDT         Regan Process At:       06/04/2007 10:06:35AM EDT         inded Process At:       06/04/2007 10:06:35AM EDT	nstance:	21338	2	т	ype:	Crys	tal	
Run Status:       Success       Distribution Status:       Posted         n       Update Process         Run Control ID: 1       Hold Request         Location:       Server         Server:       PSNTSQR         Accions:       Cancel Request         Delete Request       Delete Request         Delete Request       Restart Request         Request Created On:       06/04/2007 10:06:11AM EDT         Regan Process At:       06/04/2007 10:06:31AM EDT         Regan Process At:       06/04/2007 10:06:35AM EDT	lame:	PCAR	)	D	escription:	PCA	RD	
n       Update Process         Run Control ID: 1       Hold Request         .ocation:       Server         Server:       PSNTSQR         Accions:       Cancel Request         Delete Request       Delete Request         Cancel Request       Restart Request         Cancel Request       Restart Request         Cancel Request       Restart Request         Cancel Request       Restart Request         Mathematical Created On:       06/04/2007 10:06:11AM EDT         Request Created On:       06/04/2007 10:06:31AM EDT         Regan Process At:       06/04/2007 10:06:31AM EDT         Reduct Process At:       06/04/2007 10:06:35AM EDT	Run Status:	Succes	ss	D	)istribution	Statu	s: Posted	
Run Control ID: 1       Hold Request         .ocation:       Server         Server:       PSNTSQR         Cancel Request       Delete Request         Cancel Request       Delete Request         Cancel Request       Restart Request         Request Created On:       06/04/2007 10:06:31AM EDT       Parameters         Regan Process At:       06/04/2007 10:06:35AM EDT       Message Log         Batch Timings       Restart Request       Second Restart	in					U	pdate Process	
.ocation:       Server         Server:       PSNTSQR         Securrence:       Delete Request         Restart Request       Restart Request         te/Time       Actions         tequest Created On:       06/04/2007 10:06:11AM EDT       Parameters       Transfer         Regan Process At:       06/04/2007 10:06:31AM EDT       Batch Timings         inded Process At:       06/04/2007 10:06:35AM EDT       View Log/Trace	Run Control ID	:1					O Hold Reque	st
Server: PSNTSQR Accurrence: Cancel Request Delete Request Restart Request Actions Actions Actions Actions Transfer Actions Transfer Message Log Began Process At: 06/04/2007 10:06:31AM EDT Batch Timings Inded Process At: 06/04/2007 10:06:35AM EDT View Log/Trace	Location:	Server					O Queue Req	uest
Recurrence:       O Delete Request         Ite/Time       Actions         Request Created On:       06/04/2007 10:06:11AM EDT       Parameters       Transfer         Request Created On:       06/04/2007 10:06:31AM EDT       Message Log       Batch Timings         Regan Process At:       06/04/2007 10:06:35AM EDT       Wiew Log/Trace	Server:	PSNTS	SQR				Cancel Req	luest
te/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         Regan Process At:       06/04/2007 10:06:31AM EDT       Batch Timings         Inded Process At:       06/04/2007 10:06:35AM EDT       View Log/Trace	Recurrence:						Delete Req     Restart Re	uest
ter line       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         Inded Process At:       06/04/2007 10:06:35AM EDT       View Log/Trace								
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         Inded Process At:       06/04/2007 10:06:35AM EDT       View Log/Trace	ite/Time					A	ctions	
Run Anytime After:         06/04/2007 10:02:58AM EDT         Message Log           Began Process At:         06/04/2007 10:06:31AM EDT         Batch Timings           Inded Process At:         06/04/2007 10:06:35AM EDT         View Log/Trace	Request Crea	ted On:	06/04/2007	10:06:11	AM EDT		Parameters	Transfer
Began Process At:         06/04/2007 10:06:31AM EDT         Batch Timings           Inded Process At:         06/04/2007 10:06:35AM EDT         View Log/Trace	Run Anytime /	After:	06/04/2007	10:02:58	AM EDT		Message Log	
nded Process At: 06/04/2007 10:06:35AM EDT View Log/Trace	Began Proces	s At:	06/04/2007	10:06:31	AM EDT		Batch Timings	_
	Ended Proces	s At:	06/04/2007	10:06:35	AM EDT		View Log/Trace	

# Click on the **PDF** file to view the report:

File List		
<u>Name</u>	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		

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

6/1/2007

Statement D	t Acct	Dept	Project	Vendor	Amount	Trans Dt	Trans Number	
5/16/2007	0000	0906	1000000	VWR SCIENTIFIC PROD VCTS	20.61	5/14/2007	04000077105004004	1
5/16/2007	0000	0906	1000000	US PLASTICS/USP HOME	40.30	5/15/2 A	he P-Card ctivty Report	þ
5/16/2007	0000	0906	1000000	IVG*INVITROGEN CORPORA	127.67	<sup>5/15/2</sup> re	equires the	6
5/16/2007	0000	0906	1000000	FRYS.COM 877-688-7678	312.71	5/15/2 <b>A</b>	dobe Reader.	2
5/17/2007	0000	0906	1000000	OFFICEMAX CT IN#072992	20.99	5/15/2	Il activity in	þ
5/17/2007	0000	0906	1000000	OFFICEMAX CT IN#073021	20.99	5/15/2 ai	ny status is	þ
5/17/2007	0000	0906	1000000	BIOMEDICAL ENGINEERING S	30.00	5/16/2 <b>li</b> s	sted for the	1
5/17/2007	0000	0906	1000000	BIOMEDICAL ENGINEERING S	35.00	5/16/2 da	ate range.	3
F/17/0007	0000	0000	1000000	DIANEDIAL ENGINEEDING O	25.00	F/10/007	0401070710007001	

(Click here for Adobe Reader)

#### The report footer:

5/31/2007 7	7010 0906 7010 0906	1000000	MILLIPORE	"AMERICA EPOT	5	14.04 78.87	ວ/ວ 1/200 5/31/200	07 2465 07 She	ows date rang	133 CEG0531002 J <b>e for</b> <sub>G0531004</sub>
Cardholder	Repo	rt provi	des sign-	off and	1	Т	otal	Teb		
Card #	appro	val				7,243	3.08			
								Tota	for dates:	7,243.08
R	eflects PCard	Transactio	ns for ANS	ELT	for dates	5/15/2	2007 tł	nrough	5/31/2007	
С	ardholder S	ignature _					Date			_
	Approver S	ignature					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 Submitte	ed Rpt				
Run Control ID: 1			<u>Report Manager</u>	Process Monitor	Run
Enter card nu	mber or partial ca	rd number %12	34%		
*CU Card Nu	umber				
Process Schedu	ler Request				
User ID:	ANSELT	_	Run Control ID: 1		
Server Name:	PSNT2	Run Date:	07/18/2013		
Recurrence:		Run Time:	3:10:41PM	Reset to Current Date/Tin	ne
Time Zone:	Q				
Process List					
Select Descriptio	n	Proces	ss Name Process Typ	<u>e *Type *For</u>	mat <u>Distribu</u>

Crystal

Web

PDF

Distribution

PCARD

ОК	Cancel

Click "OK".

✓

Click on "Process Monitor"

Procurement Card Report

PCard Submitted Rpt			
Run Control ID: 1	Report Manager	Process Monitor	Run
		Process Insta	hce:213537
Enter card number or partial card number %1234%			
*CU Card Number			

Proc	ess List	С	lick Refresh	until the	e run s	status i	s "Success	". Then o	click "De	tails".
View P	Process R	eque	STFOL					-	_	
User	ID: ANSE	LT	🔍 Type:			<ul> <li>Last:</li> </ul>	1 Days	Refresh		
Serv	er:		Vame:			Instance	e: to	, <b>L</b>		
Run	.e.		Distributio	n		*	Save On Ref	iresh		
Proce	ss List		otatao			1	Customize   Find   Vie	ew All 📕 👘	First 🖪 1-3 of :	3 🕨 Last
<u>Select</u>	Instance	<u>Seq.</u>	Process Type	Process Name	<u>User</u>	Run Date/Ti	me	Run Status	Distribution Status	<u>Details</u>
	213537		Crystal	PCARDSUB	ANSELT	06/21/2007	9:37:47AM EDT	Success	Posted	Details
	213535		Crystal	PCARDSUB	ANSELT	06/21/2007	9:02:27AM EDT	Success	Posted	<u>Details</u>
	213534		Crystal	PCARDSUB	ANSELT	06/21/2007	9:00:32AM EDT	Success	Posted	Details

#### Process Detail

Process							
Instance: Name:	213537 PCARDSUB	Type: Description:	Crystal n: PCARDSUB				
Run Status:	Success	Distribution !	Status: Posted				
Run			Update Process				
Run Control IE Location: Server: Recurrence:	D: 1 Server PSNTSQR		<ul> <li>Hold Request</li> <li>Queue Request</li> <li>Cancel Request</li> <li>Delete Request</li> <li>Restart Request</li> </ul>				
Date/Time			Actions				
Request Crea	ted On: 06/21/2007 After: 06/21/2007	9:39:30AM EDT 9:37:47AM EDT	<u>Parameters</u> Transfer Message Log				
Began Proces	ss At: 06/21/2007	9:39:41AM EDT	Batch Timings				
Ended Proces	s At: 06/21/2007	9:39:43AM EDT	View Log/Trace				
OK Ca	ancel		Click				

View Log/1	Trace									
Report										
Report ID:	81476	Process Ins	stance:	213537		Message Log				
Name:	PCARDSUB	Process Ty	pe:	Crystal						
Run Status:	Success									
PCARDSUB										
Distribution	Details									
Distribution Node: WinNode Expiration Date: 06/28/2007										
File List										
<u>Name</u>			File Size	e (bytes)	Datetime C	reated				
Message Loo	1		0		06/21/2007	9:39:43.0000004	MEDT			
PCARDSUB	213537.PDF		17,541		06/21/2007	9:39:43.0000004	MEDT			
PeopleSolt I	a e File		473		06/21/2007	9:39:43.0000004	MEDT			
Distribute To										
Distribution I	<u>D Түре</u>		*Distribution ID							
User			ANSELT							
Click the PDF file to view the report.										

### The report:

6/21/2007 Clemson University Purchasing Card Submission Report									ANSELT				
Statement Dt	Entry Dt	Acct	Fund	Dept	Prog	Cls	Project	Vendor	Amount	<u>Usetax</u>	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				
Card Number         Cardholder           9286         BYKO, VICKIE L         549.79													
									Gra	and Total:		549.79	

## Contact

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