

Attaching Images to PCard Transactions

OVERVIEW

PCard supporting documentation is electronically “attached” to PCard transactions at the time they are verified or approved.

For instructions on how to process transactions see the “Approving or Verifying a PCard Transaction” Instruction Guide.

STEPS

1. Save the image of the documentation to be attached to the transaction. The saved documentation can be things such as a scanned receipt, an email, a web page, or an electronic invoice. More than one document can be attached to a transaction.
2. Identify the transaction to be verified or approved. Click on the **Comments** icon.

Reconcile Statement

Procurement Card Transactions

Empl ID 98653214 Name Grimes, Rick
Card Number *****7970 Card Provider MBNA

Bank Statement Personalize | Find | View All | [Print] First 1-9 of 15 Last

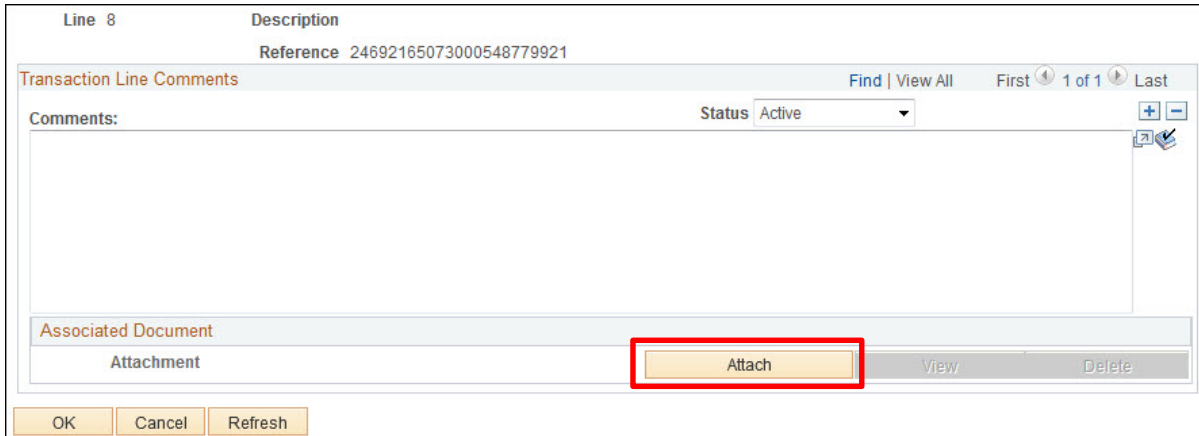
Transaction	Billing	Trans Date	Merchant	*Status	Transaction Amount	Currency	Chartfield Status	Redistrib	V
1	<input checked="" type="checkbox"/>	03/11/2015	DKC DIGI KEY CORP	Staged	143.22	USD	Valid	No	N
2	<input type="checkbox"/>	03/11/2015	CST THE COMPOSITE STORE	Staged	426.95	USD	Valid	No	N
3	<input type="checkbox"/>	03/11/2015	MCMASTER-CARR	Staged	132.93	USD	Valid	No	N
4	<input type="checkbox"/>	03/12/2015	AMAZON MKTPLACE PMTS	Staged	222.20	USD	Valid	No	N
5	<input type="checkbox"/>	03/12/2015	AMAZON MKTPLACE PMTS	Staged	679.96	USD	Valid	No	N
6	<input type="checkbox"/>	03/12/2015	MCMASTER-CARR	Staged	143.83	USD	Valid	No	N
7	<input type="checkbox"/>	03/13/2015	UF DOCE CONFERENCE	Staged	300.00	USD	Valid	No	N
8	<input type="checkbox"/>	03/14/2015	DKC DIGI KEY CORP	Staged	580.51	USD	Valid	No	N
9	<input type="checkbox"/>	03/16/2015	LOWES #00418	Staged	29.44	USD	Valid	No	N

Select All Clear All Stage Verify Approve

Search Purchase Details Split Line Distribution Template

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3. Click the **Attach** button:



The screenshot shows a web application window titled "Transaction Line Comments" for "Line 8". The window includes a "Description" field with a "Reference" of 24692165073000548779921. Below the description is a "Comments" section with a status dropdown set to "Active". At the bottom, there is an "Associated Document" section with a table containing one row: "Attachment" with an "Attach" button highlighted in red. Other buttons in the window include "View" and "Delete" in the same row, and "OK", "Cancel", and "Refresh" at the bottom left.

4. Click the **Browse** button and select the document to be attached. Then click the **Upload** button.



The screenshot shows a file selection dialog box. It has a "Browse..." button highlighted in red. Below the dialog, there are "Upload" and "Cancel" buttons, both also highlighted in red. A "Help" link is visible in the top right corner of the dialog.

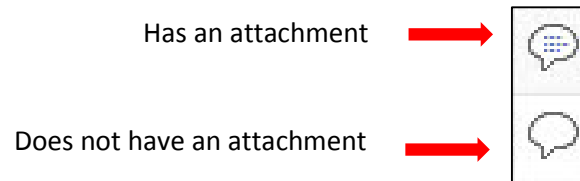
5. Once the document is uploaded, click **OK**. *Note: Under **Associated Document** you can see the document which is being attached.* To add additional documents click the plus sign located in the upper right corner.



The screenshot shows the "Transaction Line Comments" window after a document has been attached. The "Associated Document" section now displays a table with one row: "Attachment" with the filename "document.docx" and buttons for "Attach", "View", and "Delete". The "Attach" button is disabled. The "OK" button at the bottom left is highlighted in red. A plus sign (+) in the upper right corner of the "Comments" section is also highlighted in red, indicating where to click to add more documents.

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6. To confirm the document was attached; simply look at the **Comments** icon. When there is an attachment the **Comments** icon's appearance changes as shown below:



7. Proceed to verifying and/or approving the charge by adding a description and changing the chartfield as necessary. See the "Approving or Verifying a PCard Transaction in myUFL 9.1" Instruction Guide for instructions.
8. **Save** the transaction.

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If needed, to review documentation after transactions are closed:

This process is used only if you need to review a document after it is closed. It is not intended to be used to confirm if attachments exist.

This process assumes you know how to find a voucher number and to run a query.

One method way to locate an image once it has been attached to a closed transaction is to use the UF_PCARD_VOUCHER_XWALK query to identify the transaction number.

STEPS

1. Identify the transaction number in the query. This number will begin with **TXN**.

UF_PCARD_VOUCHER_XWALK - Find Transactions by Voucher #

Voucher ID:

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)






View All

	Voucher	Tran Nbr	Unit	ID	Name	Bill Dt	Date	Merchant	Descript	Amount
1	04317929	TXN02564091	2103	91411989	MR.TIEPER	12/11/2013	12/12/2013	MR. PAPER TIER1	AA batteries, post its, 3 boxes of paper	139.900

2. Now that the transaction number has been identified, navigate back to the **Reconcile Statement** page.
3. Enter the **Transaction Number** and change the **Statement Status** to **Closed**. Additional search criteria are not required but may allow the search to run faster.

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Reconcile Statement Search

Role Name:	<input type="text"/>
Employee ID:	<input type="text"/> 
Name:	<input type="text"/> 
Card Issuer:	<input type="text"/>
Card Number:	<input type="text"/>
Transaction Number:	<input type="text" value="TXN02564091"/>
Merchant:	<input type="text"/>
Sequence Number:	<input type="text"/>
Line Number:	<input type="text"/>
Billing Date:	<input type="text"/> 
Statement Status:	<input type="text" value="Closed"/>
Budget Status:	<input type="text"/>
Chartfield Status:	<input type="text"/>
Transaction Date:	<input type="text"/> 
Charge Type:	<input type="text"/>
Posted Date:	<input type="text"/> 

4. Click **OK**.

5. The image can be found in the **Comments** icon as described in step 5 above.

For additional PCard help...

- Contact University PCard Services at 392-1331
- Visit the [PCard website](#)
- E-mail pcard@ufl.edu

For technical issues...

- Contact the UF HelpDesk at 392-HELP