

Attaching Images to PCard Transactions

OVERVIEW

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

For instructions on how to process transactions see the “Approving or Verifying a PCard Transaction in myUFL 9.1” 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 (it looks like a cartoon dialogue balloon):

Reconcile Statement

Procurement Card Transactions

Empl ID: 91411989 Name: Wilkins, Jerrica
 Card Number: *****1989 Card Provider: MBNA

Bank Statement Customize | Find | View All | First 1-4 of 4 Last

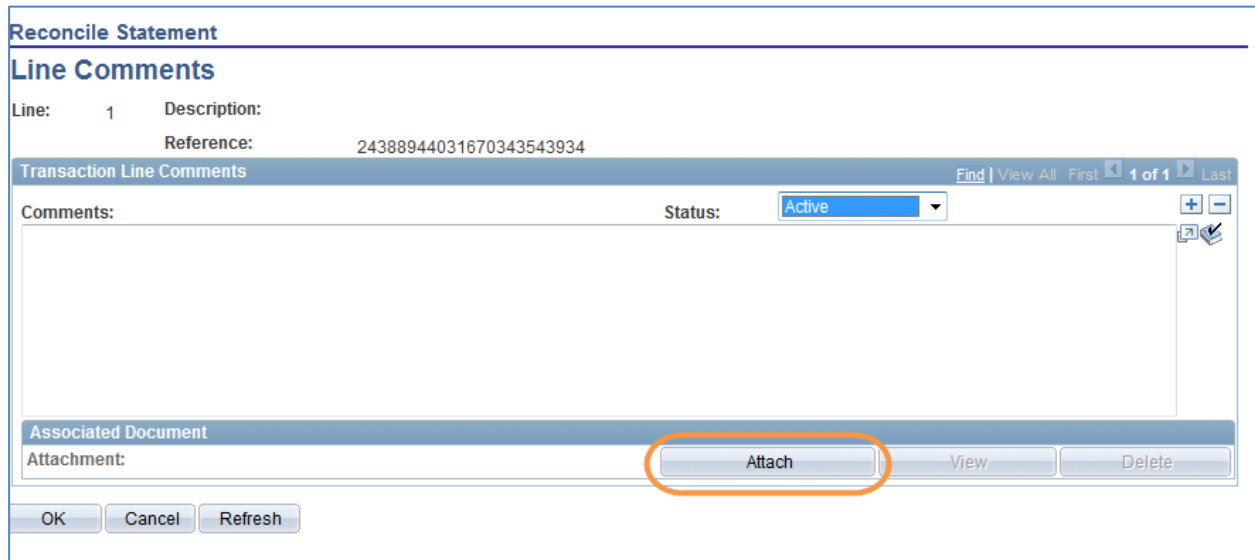
Transaction	Billing	Billing Date	Merchant	Description	*Status	Transaction Amount	Chartfield Status	Redist
1	<input checked="" type="checkbox"/>	02/05/2014	MR. PAPER TIER1		Staged	25.17	Valid	No
2	<input type="checkbox"/>	02/05/2014	MR. PAPER TIER1		Staged	35.98	Valid	No
3	<input type="checkbox"/>	02/05/2014	AIRPORT SHUTTLE		Staged	38.00	Valid	No
4	<input type="checkbox"/>	02/05/2014	MISTER PAPER INC.		Staged	34.16	Valid	No

[Select All](#) [Clear All](#) [Stage](#) [Verify](#)

[Search](#) [Purchase Details](#) [Split Line](#) [Distribution Template](#)

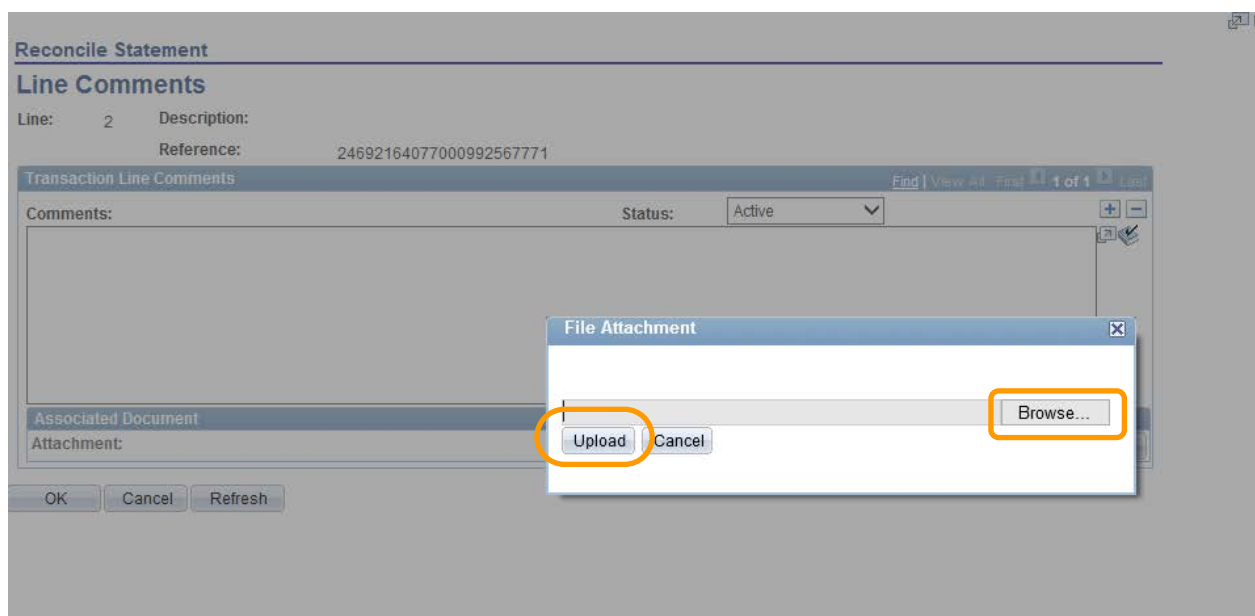
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3. Click the **"Attach"** button:



The screenshot shows the 'Reconcile Statement' window. Under the 'Line Comments' section, the 'Transaction Line Comments' pane is visible. The 'Comments' field is empty, and the 'Status' is set to 'Active'. Below this, the 'Associated Document' section has an 'Attachment:' label. The 'Attach' button is highlighted with an orange circle. At the bottom of the window, there are 'OK', 'Cancel', and 'Refresh' buttons.

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



The screenshot shows the 'Reconcile Statement' window with a 'File Attachment' dialog box open. The dialog box has a text input field, a 'Browse...' button, and 'Upload' and 'Cancel' buttons. The 'Browse...' button and the 'Upload' button are highlighted with orange circles. The background window shows the 'Associated Document' section with the 'Attachment:' label.

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Once the document is uploaded, click **"OK"**. 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.

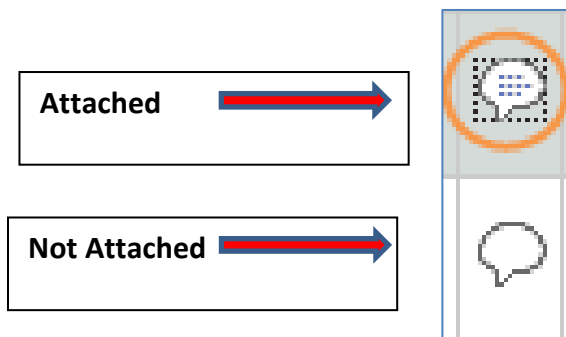
Reconcile Statement

Line Comments

Line: 33 Description:

Reference: 24717054077870771934291

1. 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:



Please note – this icon indicates the presence of a comment and or image.

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2. 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.
3. **Save** the transaction.