

P-Card Records Portal

Procurement would like to introduce to you the **P-Card Records Portal**. SFA now has a custom built portal where p-card records for each billing cycle are to be uploaded and stored electronically!



Uploaded records will be viewable by the cardholder, account manager, business manager, procurement, and audit services. The university's record retention policy will be followed for the stored p-card records.

A p-card record is **required** to be uploaded to the portal for any p-card that has transactions during a billing cycle. Like p-card detail entry, this deadline will be closely monitored. If p-card record uploads are late 3 months in a 6 month period, all p-cards for the cardholder will be deactivated for 3 months.

Deadline to upload P-Card records is on the 15th of the following month after detailing is due. (Alternate dates for weekends and holidays will be communicated through the p-card list-serv)

Example: Billing Cycle: Oct 4 – Nov 3, 2018
 Detail entry is due: Nov 15, 2018
 Record upload is due: Dec 15, 2018

Each p-card record must be saved as a pdf file: 1 record for each p-card per billing cycle. Submitting a new document will permanently delete the document on file.

Departments may choose to keep paper records or shred them after records have been uploaded. A thorough verifying process should be followed before documents are permanently destroyed. See **Tips for Success**

The P-Card Records Portal begins with the Sep 04 – Oct 03, 2018 billing cycle (FY19).

P-Card Records Portal

ACCESS the portal from mySFA on the RESOURCES tab under Procurement Services.
(Firefox, Chrome, and Internet Explorer are all supported browsers)

Cardholders, Business Managers, and Account Managers will have access to upload records, view records, or replace records within the portal.

The screenshot shows the mySFA website interface. At the top, there is a purple header with the Stephen F. Austin State University logo and the text "STEPHEN F. AUSTIN STATE UNIVERSITY" on the left, and the "mySFA" logo on the right. Below the header is a navigation bar with tabs for "HOME", "EMPLOYEE", "RESOURCES", "BUDGET & FINANCE", and "RESEARCH". The "RESOURCES" tab is selected. Below the navigation bar, there is a sub-navigation bar with "mySFA" and "Resources". The main content area is a grid of service categories. A purple arrow labeled "P-Card" points to the "P-Card Records Portal" link under the "PROCUREMENT SERVICES" category. Other categories include "COURSE EVALUATIONS AND SURVEYS", "DINING SERVICES", "SELF-SERVICE BANNER", "TRAVEL", "INSTITUTIONAL EFFECTIVENESS AND ASSESSMENT", "SPACE SCHEDULING AND MANAGEMENT", "CONTACTING FACULTY/STAFF AND STUDENT EMAIL LIST", and "PRINTING SERVICES".

COURSE EVALUATIONS AND SURVEYS	DINING SERVICES	SELF-SERVICE BANNER
	Faculty/Staff Meal Plans - Signup or Change	Self-Service Banner
	View Meal Plan Balance & Purchase History	
	Purchase Additional Dining Dollars	TRAVEL
	View Dining Dollars Balance & Purchase History	Travel
		Travel Guidelines
	INSTITUTIONAL EFFECTIVENESS AND ASSESSMENT	PROCUREMENT SERVICES
	Nuventive Improve	P-Card Records Portal
	SPACE SCHEDULING AND MANAGEMENT	CONTACTING FACULTY/STAFF AND STUDENT EMAIL LIST
	Astra Scheduling	Standard Email Lists
	Platinum Graphics	Faculty/Staff Directory
		Emails Sent to Admitted Students
	PRINTING SERVICES	
	Online ordering and delivery for your printing and graphic design needs	
	Printing Services	

P-Card Records Portal

Here's the HOME page!!



Let's take a look

Welcome to the P-Card Records Portal

P-Card records for all transactions must be uploaded for each billing cycle.

Order of P-Card records:

- 1) Transaction Detail Summary (TDS)
- 2) CitiBank statement
- 3) Transaction document - in the same order as listed on the TDS

Include: receipts, forms, packing slips, and any correspondence related to the transaction to justify a valid business purpose

Records must be in this order

BILLING CYCLES:

- Current:** Upload P-Card record for the current billing cycle... (October 04, 2018 to November 03, 2018)
- Previous:** View or replace uploaded records
- Outstanding:** Record upload needed for cycle(s) below

Select your Billing Cycle and click NEXT to begin upload process

No outstanding Billing Cycles

OR

- 1) Card #9999 - Smith, Suzy Sep 04, 2018 through Oct 03, 2018

NEXT

View all active p-cards for which you have access

[View Active P-Card\(s\)](#)

This is an official Stephen F. Austin State University computer system. As a State of Texas Institution of Higher Education, unauthorized use is prohibited, usage may be subject to security testing and monitoring, misuse is subject to criminal prosecution, and no expectation of privacy except as otherwise provided by applicable privacy laws.

Procurement & Property Services | 936-468-4353 | [Email](#)

The dates for the Current billing cycle will change on the 21st of each month

P-Card Records Portal



Preparation for upload process

Records for each p-card for a billing cycle should be organized into the following order. Smaller receipts should be taped to a standard 8 x 11 piece of paper for ease of scanning.

- Transaction Detail Summary (TDS)
- CitiBank Statement
- Documents for each purchase, in order of the TDS
 - Including: receipts, invoices, order forms, packing slips, shipping documents, SFA forms (HEF, Exception, Documentation/Problem Resolution), food form, departmental transaction forms, CitiBank Dispute Forms, email correspondence, etc...
 - Documentation should support a valid business purpose

Scanning and Saving

The compiled records for a p-card must be scanned into 1 pdf file and saved.

(The maximum file size is 5MB. Please contact pcard@sfasu.edu if exceeded.)

A consistent naming convention for the saved records is needed to easily identify the proper record for upload. Ex: Suzy Smith_Card #9999_10-4 to 11-3-2018

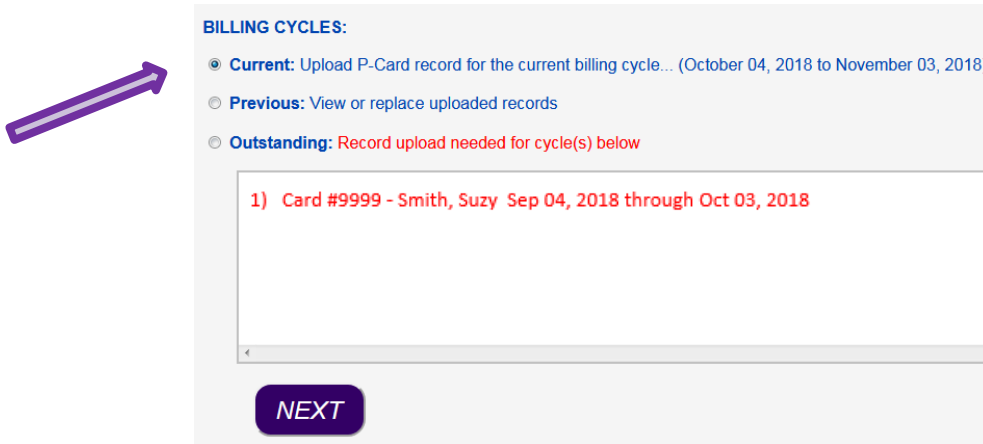
Now we're ready to go!



P-Card Records Portal

Let's start with **uploading a P-Card record for the CURRENT billing cycle.**

From the **HOME** page select the Current Billing Cycle and click **NEXT**.



BILLING CYCLES:

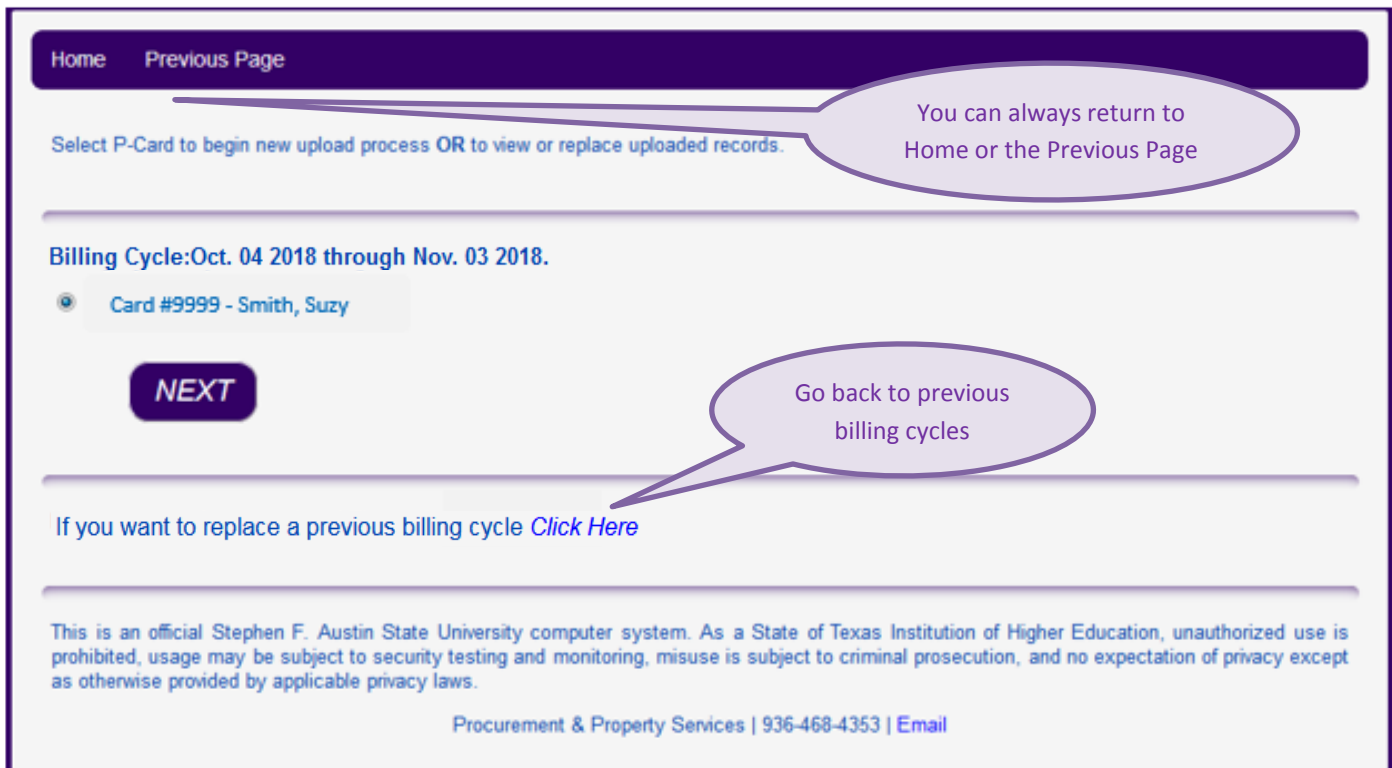
- Current:** Upload P-Card record for the current billing cycle... (October 04, 2018 to November 03, 2018)
- Previous:** View or replace uploaded records
- Outstanding:** Record upload needed for cycle(s) below

1) Card #9999 - Smith, Suzy Sep 04, 2018 through Oct 03, 2018

NEXT

Only p-cards that have transactions in the current billing cycle will be displayed.

Select the desired P-Card and click **NEXT** to go to the **UPLOAD** Page.



Home Previous Page

Select P-Card to begin new upload process OR to view or replace uploaded records.

Billing Cycle: Oct. 04 2018 through Nov. 03 2018.

- Card #9999 - Smith, Suzy

NEXT

If you want to replace a previous billing cycle [Click Here](#)

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Callout 1: You can always return to Home or the Previous Page

Callout 2: Go back to previous billing cycles

The dates for the Current billing cycle will change on the 21st of each month.

P-Card Records Portal

UPLOAD PAGE

Prepare your P-Card records as directed, scan into one document, and save as a pdf.

Click on 'Choose pdf to upload' to select the P-Card record to upload.

The file name and first page of the document will display.

Submit

[Home](#) [Previous Page](#)

IMPORTANT: Begin each file with the Transaction Detail Summary and CitiBank statement, followed by the records for each transaction in the order listed within the Transaction Detail Summary. All information must be in ONE document.

Only one file may be uploaded per billing cycle.

REALLY IMPORTANT!!

Card #9999 - Smith, Suzy
Billing Cycle: Oct. 04 2018 through Nov. 03 2018.

Total amount of transactions: \$4,386.00
Total number of transactions: 8

Please note that current document uploads must be 5MB or less to properly process.

Choose pdf to upload

No file currently selected for upload

Submit

Please do NOT refresh after submitting.

Remember!! Only 1 file per card, per billing cycle

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P-Card Records Portal

After submitting a file you will see the **'Upload was successful!'** page.

From here you can **View** the uploaded record, or **Replace** the record if needed.

Select a navigation option to choose another p-card, go to the Home page, or logout.



Upload was successful!

VIEW*

[VIEW](#) uploaded record for **Card #9999 - Smith, Suzy** for billing cycle **Oct 04, 2018 through Nov 03, 2018**

[REPLACE](#) uploaded record

REPLACE**

Select a navigation option:

- [Choose another P-Card \(to upload or replace\)](#)
- [Home \(go to previous billing cycles or outstanding records\)](#)
- [Logout](#)

Choose your next move

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***View** – document opens in a new browser window and can be downloaded and saved

****Replace** – goes back to the **UPLOAD** page of the record just submitted

P-Card Records Portal

Now let's look at **PREVIOUS** Billing Cycles*

Records from previous billing cycles may be viewed, uploaded, or replaced.

Make the following selections:

- **Previous** billing cycle on the HOME page
- Fiscal year
- P-Card
- (Click **View** to view stored record or to save before replacing)
- Billing cycle (selection can only be made for billing cycles with transactions)
- **NEXT**

Home Previous Page

Current Selection is:

- Fiscal Period 01-SEP-2018 through 31-AUG-2019
- Card #9999 - Smith, Suzy

Please select the cycle period:

- Jan 04, 2019 through Feb 03, 2019
- Dec 04, 2018 through Jan 03, 2019
- Nov 04, 2018 through Dec 03, 2018
- Oct 04, 2018 through Nov 03, 2018
- Sep 04, 2018 through Oct 03, 2018 [View](#)

Selection for upload only available for billing cycles with transactions.

NEXT

A document has been uploaded for this billing cycle

Document opens in a new browser window and can be downloaded and saved

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Select **NEXT** to be directed to the **UPLOAD** page to upload a new record or replace a previously uploaded record.

***The P-Card Records Portal begins with the Sep 04 – Oct 03, 2018 billing cycle (FY19).**

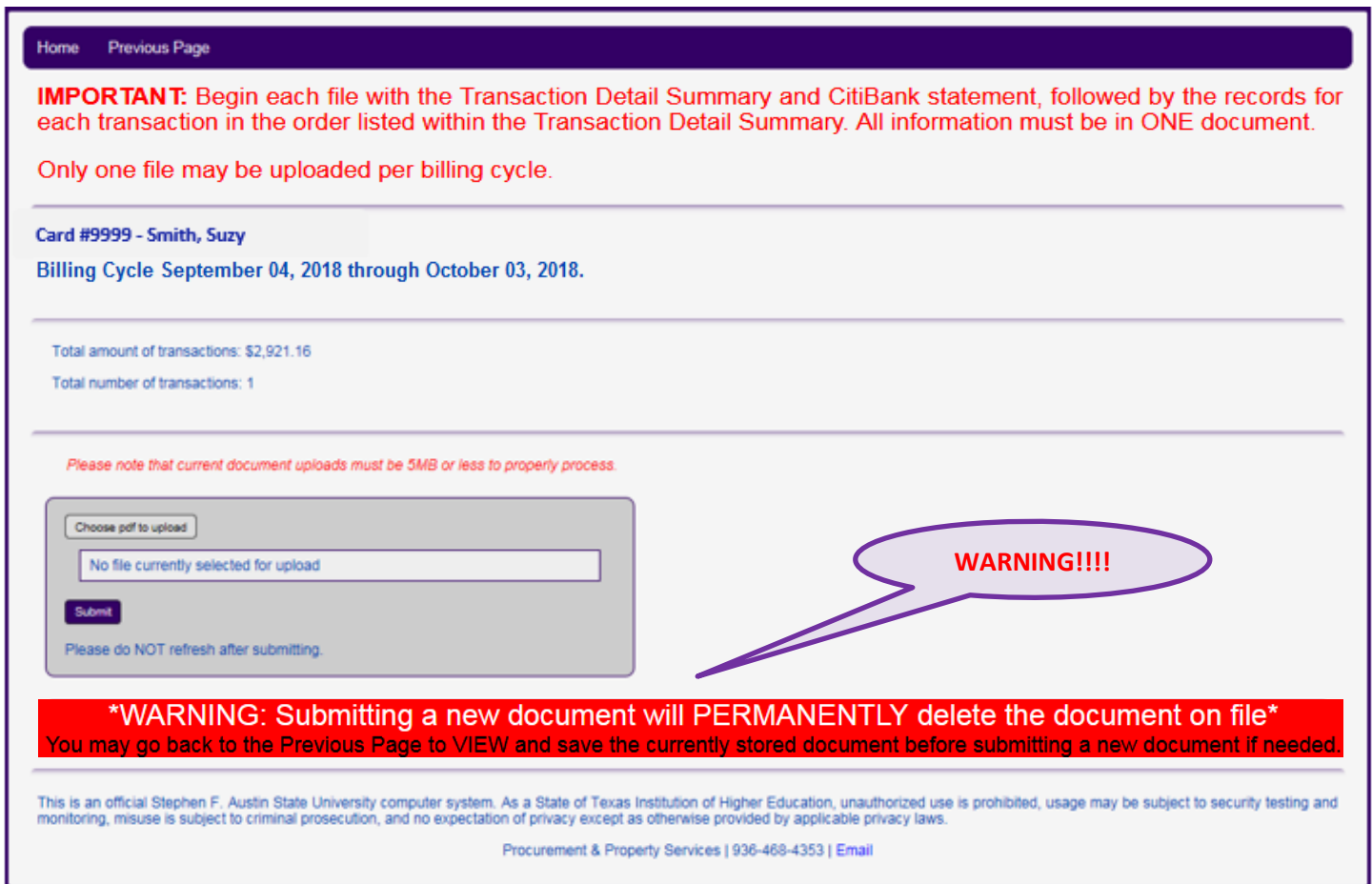
P-Card Records Portal

REPLACING records

It's important to remember that **uploading a record permanently replaces the stored record.**

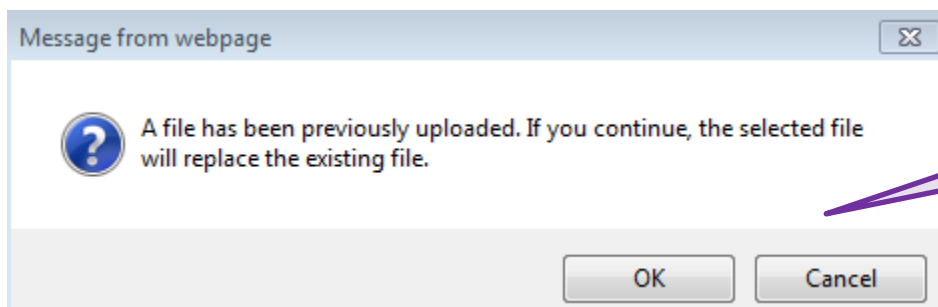
When replacing a record the **Upload** page will contain a **warning** to remind you that only 1 document may be stored for each billing cycle.

You may go back to the Previous Page to **VIEW** and save the currently stored document before submitting a new document, if needed.



The screenshot shows the 'Upload' page in the P-Card Records Portal. At the top, there are navigation links for 'Home' and 'Previous Page'. A prominent red warning message states: 'IMPORTANT: Begin each file with the Transaction Detail Summary and CitiBank statement, followed by the records for each transaction in the order listed within the Transaction Detail Summary. All information must be in ONE document. Only one file may be uploaded per billing cycle.' Below this, the card information is displayed: 'Card #9999 - Smith, Suzy' and 'Billing Cycle September 04, 2018 through October 03, 2018.' Transaction statistics are shown: 'Total amount of transactions: \$2,921.16' and 'Total number of transactions: 1'. A note indicates that document uploads must be 5MB or less. The upload interface includes a 'Choose pdf to upload' button, a text box showing 'No file currently selected for upload', and a 'Submit' button. A red callout bubble with the text 'WARNING!!!!' points to the 'Submit' button. A red banner at the bottom of the page reads: '*WARNING: Submitting a new document will PERMANENTLY delete the document on file* You may go back to the Previous Page to VIEW and save the currently stored document before submitting a new document if needed.' The footer contains a disclaimer and contact information for Procurement & Property Services.

A **second warning** is given before you **Submit** the new document.



The screenshot shows a browser message box titled 'Message from webpage'. It contains a question mark icon and the text: 'A file has been previously uploaded. If you continue, the selected file will replace the existing file.' At the bottom of the message box are 'OK' and 'Cancel' buttons. A red callout bubble with the text 'Final Warning!!!!' points to the message box.

P-Card Records Portal

Finally, let's look at the **OUTSTANDING** Billing Cycles

Any billing cycle that is not considered the 'current' billing cycle, that has transactions, and does not have a record uploaded will be considered outstanding. Action should be taken to upload the p-card record for the outstanding billing cycle before the deadline.

Select **Outstanding** on the **HOME** page, choose a p-card and follow the same process as uploading a new record.

Don't Miss the
DEADLINE!

Billing cycles will be considered **delinquent** if not uploaded by the deadline. Like p-card detail entry, this deadline will be closely monitored. If p-card record uploads are late 3 months in a 6 month period, all p-cards for the cardholder will be deactivated for 3 months.

Deadline to upload P-Card records is on the 15th, 1 month **after** detailing is due.

(Alternate dates for weekends and holidays will be communicated through the p-card list-serv)

Example: Billing Cycle: Oct 4 – Nov 3, 2018
Detail entry is due: Nov 15, 2018
Record upload is due: **Dec 15, 2018**

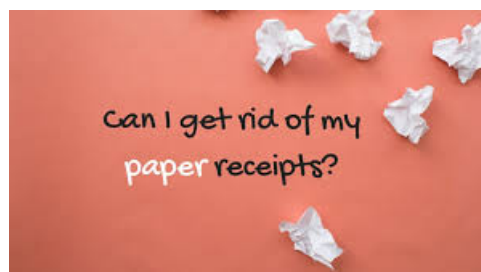


Records not uploaded by the deadline will be considered delinquent.

P-Card Records Portal

TIPS FOR SUCCESS

- It is the departments' responsibility to **VERIFY** uploaded records to ensure the following:
 - The record is in proper order
 - Transaction Detail Summary
 - CitiBank Statement
 - Transaction receipts in the order of the Transaction Detail Summary, (includes receipts, invoices, forms, packing slips, and any correspondence to justify a valid business purpose)
 - Every page is scanned and legible
 - The correct record has been uploaded for the cardholder and the billing cycle
- Adding additional documents to an uploaded record for a billing cycle
 - Remember, once uploaded a record can only be replaced, not appended
 - Prepare a new document from the saved pdf for the billing cycle
([VIEW](#) the previously uploaded document to save to your computer, if needed)
 - If available, use Adobe Acrobat to insert the page(s) and save as a new pdf; **OR** add the page(s) to your paper records, re-scan, and save as a new pdf
 - **REPLACE** the stored record in the portal by **uploading** your newly saved pdf
 - All documents related to each transaction must be in the uploaded record
- Departments are responsible for shredding paper records **only after** the uploaded documents have been **thoroughly** verified.
- Paper records that have been retained should be disposed of in accordance with SFA's Records Management Policy 2.9.



Procurement is here to help!! Please contact us anytime!!

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