

Accessing & Approving the PCard Application in UCF Financials

In this Addy Tip you will learn how to access, complete, and approve a PCard application in UCF Financials. This application replaces the form that was previously located on the Finance and Accounting (F&A) website.

NOTE: If you do not have access to UCF Financials, an employee with UCF Financials access can submit a PCard request on your behalf.

Step	Action			
1.	Log into UCF Financials.			
2.	In UCF Financials navigate to Main Menu > Employee Self-Service > PCard Application.			
	UCF Financials			
	Favorites -	orites 🗸 📔 Main Menu 👻		
	Top Menu Featu	Search Menu:		
	Oui	Employee Self-Service Procurement		
	The menu is nov page. Click on N	Supplier Contracts Employee Project Center Departmental Authoriza PCard Application		
	Highlights	Items Travel and Expense Center		
	Recently Used now appear un Favorites menu	Suppliers Purchasing		



Step	Action
3.	Select the Add a New Value tab.
	Favorites Main Menu Favorites Favorites Favorites Pcard Application
	Search/Fill a Form
	Find an Existing Value Add a New Value
	▼ Search Criteria
	Sequence Number = V Subject (begins with V Document Key String (begins with V Priority = V Due Date = V Due Date = V Approval Status = V Case Sensitive Search Clear Basic Search 🕅 Save Search Criteria
4.	For information on how to fill out the form, go to the Instructions tab.
	Form Instructions Attachments
	Seq # 3 Pcard Application
	*Subject



ер 5.	Action If you need to upload supporting documents, under the Form tab, Save the application Then, so to the Attachments tab. In the Upload your ottachments section, slick the					
	Attach button.	ments tab. In the Opload your att	actiments section, enck the			
	Eorm Instructions Attachments)				
	Seq # 3 Pcard Application *Subject test					
	Download Templates	Personalize Fi	nd View All 🔄 🔣 🛛 First 🕚 1 of 1 🛞 La			
	Description	Attached File	Open			
	1 41-967.pdf 41-967.pdf		Open			
	Upload your attachments	Personalize Fi	Personalize Find View All 🖾 🔢 🛛 First 🕚 1 of 1 🕑 Last			
	*Description	Attached File	Attach Open			
	'L		Allacti			
	Browse for the file. Click Upload .					
		Browse				
	Enter a description of t	he file being attached.				

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tep	Action		
6.	To complete the application, go to the Form tab and fill in the required fields. Clice Save when done.		
	UCF Financials	Advanced Search myUCF H	
	Favorites - Main Menu - > Employee Self-Serv	rice → > PCard Application	
	Form Instructions Attachments		
	PCard Application		
	*Subject 🖂		
	Priority 3-Standard V	Due Date	
	Status Initial		
	New Account	Transaction	
	Close Account	Type Credit Limit	
	Change Name	Single	
	Name (in Payroll)	Purchase	
	Employee ID	Justification	
	Date of Birth	(if single	
	Division/College	purchase limit is > =	
	Section	\$5000) 254 characters remaining	
	Department ID	Special	
	Project ID	Departmental Requirements	
	Fund Code	Requirements	
	Country	254 characters remaining	
	Business Address 1	I have read the cardholder agreement on the attachments tab.	
	Business Address 2		
	City		
	Postal		
	Phone		
	Email address		
	More Information		
	Save	//	
	Notify		
	Form Instructions Attachments		
	Once the form is saved a unique se	equence number will be assigned and you will be	
	prompted to submit for approval 1	Inon submission the form will route for approval	
	prompted to submit for approval. C	poin submission, the form will route for approval t	

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Step	Action
	the responsible fiscal officer (RFO) or the dean, director, or chair (DDC) of the department or project listed on the form. Click the Preview Approval button to view the workflow routing. Click Submit when you are ready to submit the form for approval. Once the request has been approved, you will be notified by the PCard administrator.
	Seq # 3 Pcard Application
	*Subject
	Priority 3-Standard
	Status Initial Preview Approval Submit
	Note: If you need to verify where the form is in the workflow process, navigate to Employee Self-Service > PCard Application and select the Find an Existing Value tab. Search for the form that was previously submitted. After you find it, click the Approver Status button. You can also run the FXPO_FM_PCARD_APPROVAL query to view the workflow routing.
	If you need to modify the form after it has been submitted, click Cancel Approval . Then, update and resubmit the form.
	Approver Status Cancel Approval
7.	To approve a PCard application, navigate to the form in one of the following two ways:
	a. Navigate to Main Menu > Worklist > Worklist and search for the form approval link. Click the link for the appropriate form.



Worklist	t for		Worklist Filters	Feed v
Detail view				
From	Date From	Work Item	Worked By Activity	Priority Link
	07/17/2018	Approval Routing	Approval Workflow	3-Low FormApproval, 34, PCARD 1900-01-01, N, 0, Pcard App test - 13.
Sub App: Forn App: Det: Sub Pric Due Req	ject: [Form roval noval. ails are sho ject: New ca ority: 3 Date: uester: Addy	Approval] For 04) has been wn below: rd	or Denv the f	04) is waiting for you: 1 is waiting for your
(Th Bui	ck on the UR ps://fi92XXX M.FORM_APPRO is message w lder on 2018	L to Approve X.net.ucf.edu VAL.GBL?Page= as automatica -07-17 at 14.	or Deny the f 1/psp/FI92XXXX FORM_APPR_ACT ally generated .04.29.000000.	Corm: C/EMPLOYEE/ERP/c/MANAGE CION&Action=U&SEQ_NBR= by Form and Approval Please do not reply



Step	Action
8.	Click the Go to Form button to review the information submitted on the form.
	Favorites • Main Menu • > Worklist • > Approve/Review a Form
	Seq # 13 Pcard Application Subject test Go to Form Approval Action
	Comment Approve Deny Save Comment
	Click the Attachments tab to review any supporting documents added to the form.
	Form Instructions Attachments Seq # 3 Pcard Application
	Subject
	Priority 3-Standard
	Status Pending
	Close the window. Click cancel to return to the PCard Application . Select an Approval Action .
	Approve Deny Save Comment