ADDY TIPS

UCF Financials

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**.
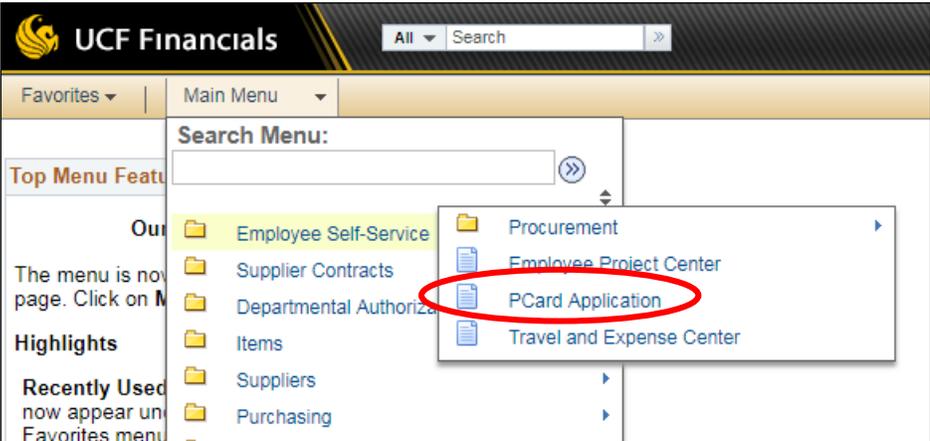
Step	Action
3.	Select the **Add a New Value** tab. Favorites ▾ | Main Menu ▾ > Employee Self-Service ▾ > Pcard Application **Search/Fill a Form** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value | **Add a New Value** ▼ Search Criteria Sequence Number = Subject begins with Document Key String begins with Priority = Due Date = Approval Status = ☐ 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

Step	Action
5.	If you need to upload supporting documents, under the **Form** tab, **Save** the application. Then, go to the **Attachments** tab. In the **Upload your attachments** section, click the **Attach** button.

Browse for the file. Click **Upload**.

Enter a description of the file being attached.

Step	Action
6.	To complete the application, go to the **Form** tab and fill in the required fields. Click **Save** when done.

Once the form is saved, a unique sequence number will be assigned, and you will be prompted to submit for approval. Upon submission, the form will route for approval to

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.

| Form | Instructions | Attachments |

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

Step	Action
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.

Step	Action

b. Select the hyperlink in the email notification.

-----Original Message-----
From: psoft@net12210 [mailto:psoft@net12210]
Sent: Tuesday, July 17, 2018 2:05 PM
To: Jane Doe <Jane.Doe@ucf.edu>
Subject: [Form Approval] Form 10 (PCARD_04) is waiting for your Approval

Form 10 (PCARD_04) has been submitted and is waiting for your Approval.
Details are shown below:

Subject: New card
Priority: 3
Due Date:
Requester: Addy

Click on the URL to Approve or Deny the form:
https://fi92XXXX.net.ucf.edu/psp/FI92XXXX/EMPLOYEE/ERP/c/MANAGE_FORM.FORM_APPROVAL.GBL?Page=FORM_APPR_ACTION&Action=U&SEQ_NBR=10

(This message was automatically generated by Form and Approval Builder on 2018-07-17 at 14.04.29.000000. Please do not reply to this email.) |

Step	Action
8.	Click the **Go to Form** button to review the information submitted on the form.

Favorites ▾   Main Menu ▾   >   Worklist ▾   >   Worklist   >   Approve/Review a Form

Seq # 13   **Pcard Application**

Subject test

Go to Form

Approval Action

Comment

Approve   Deny   Save Comment
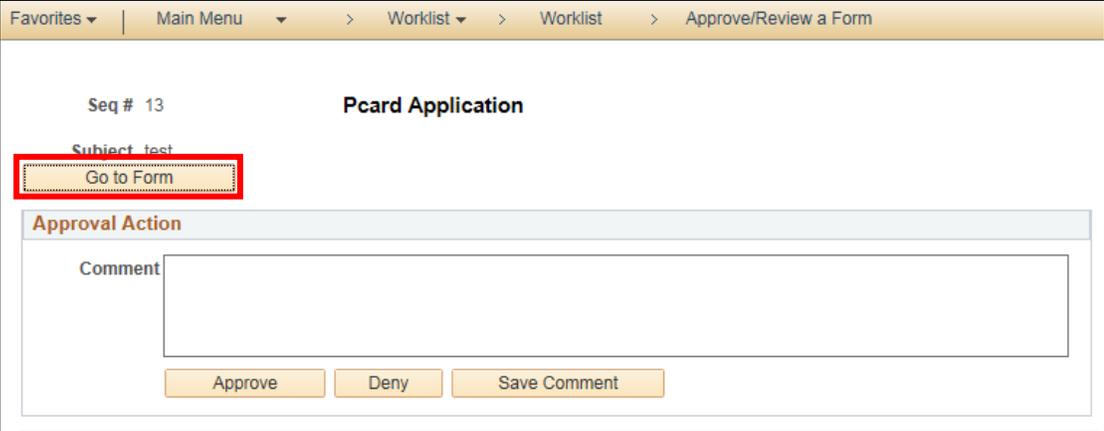
Click the **Attachments** tab to review any supporting documents added to the form.

Form

Form | Instructions | Attachments

Seq # 3   **Pcard Application**

Subject

Priority 3-Standard

Status Pending
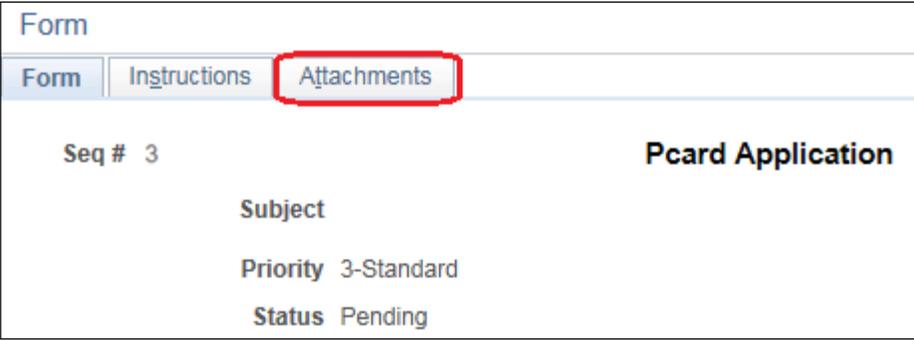
Close the window. Click cancel to return to the **PCard Application**. Select an **Approval Action**.

Approve   Deny   Save Comment