

P-Card & Travel Forum

05-Nov-2019

Application Updates

P-CARD

When 'Travel' is selected the 'Reference Number' field becomes mandatory. You may enter one or more TA and/or TR numbers. When entering multiple numbers, separate each number with a comma.

TRANSACTION INFORMATION

* Receipt Classification

* Receipt Type

When Travel is selected as the Receipt Classification, the reference field will become mandatory.

You may enter one or more TA or TR numbers in the reference field.

* Description

* Reference Number

Qualified Approval

P-CARD

If the index number or account code becomes in-active during the process, red text will appear. The index or account code will need to be updated to move

Index 1	<input type="text" value="A00002"/>	<input type="button" value="🔍"/>	<input type="button" value="ℹ"/>
	<p>Index is now inactive</p>		
Account 1	<input type="text" value="145100"/>	<input type="button" value="🔍"/>	<input type="button" value="ℹ"/>
	<p>Account is now inactive</p>		
Index 2	<input type="text"/>	<input type="button" value="🔍"/>	
Account 2	<input type="text"/>	<input type="button" value="🔍"/>	

P- CARD

Return for Correction has been added to the P-Card Transaction process, functioning the same as the Travel process.

RETURNED FOR CORRECTION

Please review the comments near the bottom of this request before proceeding.

Travel

A list of P-Card transactions will be available on TAs and TRs.

This includes transactions during the itinerary dates +/- 3 days. Also includes any transaction where the TA or TR number was entered in the 'Reference Number'

P-CARD TRANSACTIONS ← P-Card transactions made by the traveler during the itinerary dates +/- 3 days, and any transactions where the TA or TR number was entered in the 'Reference Number' field.

Transactions listed below may be incomplete until all transactions are loaded from the bank and associated with this trip. Transactions made by the traveler during the itinerary of this trip (± 3 days) are also displayed.

P-Card Transactions for TA										
Number	Cardholder (100)	Card Number	Department	Invoice Date	Supplier	Amount	Stage	Description	Reference Nu	
PCARD000175252	Steve Funk	*****7028	DPINFT - Information Technology	2019-08-22	OCC Campus Store SFunk	\$19.00	Receipt Attacher (Level 10)	Example P-Card transaction	TA300004	
PCARD000137522	Steve Funk	*****7028	DPINFT - Information Technology	2019-05-07	AMAZON.COM*MZ2KM3YS0 AMZN	\$35.99	Recorded	Book for ServiceNow team learning		
PCARD000139408	Steve Funk	*****6755	DPVPAD - Vice President-Business & Finance	2019-05-13	OCC Copy Center SFunk	\$71.98	Recorded	Table Tents for SEA Annual Luncheons		
						Sum	\$126.97			

Travel

Do not send itinerary to traveler added to the TA form.

Available if traveler is not a current benefited employee.

NOTE: The staff role is retained by terminated employees up to 90 days from their termination date.

TRAVELER

* Traveler's Name or A-Number

Joe Student

A-Number

A01505436

Email

servicenow.junk@usu.edu

Mobile Phone

Do not send itinerary to traveler

Box is displayed when the traveler meets the following conditions:

- is not a current university employee
- is not a benefit eligible employee

TRIP INFORMATION

NOTE: Traveler will retain the 'staff' role until 90 days from their termination date.

* Traveling Department

* Purpose

* International Destinations

Travel / Project Name

* Description

Group Travel

Travel

If the index number or account code become in-active during the process, red text will appear. The index or account code will need to be updated to move forward.

Index 1	<input type="text" value="A00002"/>	<input type="button" value="🔍"/>	<input type="button" value="ℹ️"/>
	Index is now inactive		
Account 1	<input type="text" value="145100"/>	<input type="button" value="🔍"/>	<input type="button" value="ℹ️"/>
	Account is now inactive		
Index 2	<input type="text"/>	<input type="button" value="🔍"/>	
Account 2	<input type="text"/>	<input type="button" value="🔍"/>	



**When will these
changes launch?**

Friday, November 8th