## P-Card Web App Certification Instructions

## Accessing the Web App

- 1. Using Chrome or Firefox, go to www.suny.edu
- 2. Select **System.SUNY.edu** near the top right

	Y ×				
← → C □ w	ww.suny.edu				
ATTEND SUNY •	WHAT IS SUNY? *	WHY DOES SUNY MATTER? *	Search	Q	System.SUNY.edu SU

- 3. Under Employee Resources, select SUNY Portal
- 4. If prompted, from the SUNY Secure Sign On select Stony Brook for Campus and then click Login

S	UNY Secure Sign On
r	Campus:
	Stony Brook
	Remember Campus?
	LOG IN

- 5. If prompted, enter your NetID and NetID password to login
- 6. Near the top left under Business Systems Applications, select Finance & Management System

## **Review Transactions**

1. Hover over Finance and under the Procurement Card heading, select Cardholder Statement



2. The system requires certifying the oldest not certified statements first, so from the Statement Cycle dropdown, select the **oldest** statement that's labeled (Not Certified)

Statement Cycle:	Mar 07 2015 - Apr 06 2015 (Not Certified)	•
formation Statement Date	Jun 07 2015 - Jul 06 2015 (Workin May 07 2015 - Jun 06 2015 (Not Certified Apr 07 2015 - May 06 2015 (Not Certified	1) 1)
Cardholder Name J	Mar 07 2015 - Apr 06 2015 (Not Certified	i)

3. Transaction details will display; Review transactions; If you need to change accounts for any transactions, see **Reallocate**. If you do not need to make changes, see **Certify Transactions** 

Reallocate (Change Accounts) Skip to Certify Transactions if not changing accounts

- 1. Reallocating to a Single Account:
  - a. If you need to change accounts for a transaction, under the Actions column, click **Edit** next to the transaction whose account you need to change

rans. Date¢	Vendor Name 0	Trans. Description	Account Number(s)	Trans. Amount	Eunding Amount	Actions
3/31/2015	RACHELS MEDITERRANEAN	Eating Places, Restaurants	9001740000	\$176.00	\$176.00	ø Edit
3/28/2015	RACHELS TECHNOLOGY	IT Supplies	8097270000	\$186.25	\$186.25	o Edit
3/22/2015	TOPS MARKETS #042	Grocery Stores, Supermarkets	9001740000	\$14.99	\$14.99	0 Edit

b. Click **Edit Funding**, then on the Funding Line screen, make necessary changes to account number. Then click **Save & Return** (If A Confirm Funding Override message appears, click **OK** and then click **Save**)

Account Number:	8405380000 - C	lient Support		
ub Object Code:	530010 - TONE	ER		
* Fiscal Year	2014	* Amount:	\$186.25	
ng Description:				

- 2. Reallocating to Split Accounts:
  - a. If splitting the transaction between two or more accounts, on the Funding Line screen enter the account information and dollar amount for the first account and a Funding description, if desired.

Then click Save/Add Next Account.

* Account Number:	8405380000 - Clie	ient Support
* Sub Object Code:	530010 - TONER	district.
* Fiscal Year:	2014	* Amount 100
Funding Description:	First Split	

- b. The next screen will show the remaining amount that may be split against additional accounts. On this funding line, enter/update the required account information and a funding description, if desired.
- c. Then to enter more funding, click Save/Add Next Account, or if this is the last line to add, click Save & Return. Once all changes for the transaction are completed, click Save on the Transaction Details page.
- 3. If the amount of funding does not match the amount of the transactions, any transactions with missing funding will have an Edit button that is highlighted in red and the page will not allow you to certify. Click **Edit** and balance the transaction to continue.

rans. Date¢	Vendor Name 0	Trans. Description 0	Account Number(s)	Trans. Amount \$	Funding Amount	Actions
3/31/2015	RACHELS MEDITERRANEAN	Eating Places, Restaurants	9001740000	\$176.00	\$175.00	ø Edit
3/28/2015	RACHELS TECHNOLOGY	IT SUPPLIES	8097270000 8405380000	\$186.25	\$186.25	ø Edit
3/22/2015	TOPS MARKETS #042	Grocery Stores, Supermarkets	9001740000	644.00	514.00	ø Edit
			Statement/Funding Total	\$377.24	\$376.24	

## **Certify Transactions**

1. Once all transaction changes are complete and the billing cycle is closed, click the **Certify** button at the bottom of the Statement Detail page

Trans. Date¢	Vendor Name	Trans. Description	Account Number(s)	Trans. Amount 0	Funding Amount	Actions
03/31/2015	RACHELS MEDITERRANEAN	Eating Places, Restaurants	9001740000	\$176.00	\$176.00	ø Edit
03/28/2015	RACHELSTECHNOLOGY	IT SUPPLIES	8097270000 8405380000	\$186.25	\$186.25	o Edit
03/22/2015	TOPS MARKETS #042	Grocery Stores, Supermarkets	9001740000	\$14.99	\$14.99	ø Edit
			Statement/Funding Total:	\$377.24	\$377.24	

2. Enter any desired optional Certification Reason/Comments and click Certify

I, Julie Sharma, co are correct and rec approved by the P prohibited by state	rtify that the purchases and amounts listed on this account statement juired to fulfill the mission of my Campus, do not exceed spending limits rogram Administrator, are not for my personal use and are not for items ate or by my Campus.
Date: J Certification Reason/Comments:	une 25, 2015
Optional comm	ents Certify X Cancel

3. Once certification is completed, the page will update to show that this statement has been certified. If any changes are needed before the statement is certified by the campus, you can click **Uncertify** to undo the certification and make any necessary changes.

<ul> <li>Select Period</li> </ul>	d Statement Cycle: Mar 07 2015 - A	pr 06 2015 (Certified)				
Statement In	Statement Date: April 6, 2015 Cardholder Name: J Sharma t Transaction Count: 3	ß	Cardholder Cer Default SFS Journal	tification: Certified 06 Account: 9001740000 Number: P004186	5/25/201 by Julie St	arma
Statement Det	tail					
Statement Det Trans. Date≎	tail Vendor Name 0	Trans. Description 0	Account Number(s)	Trans. Amount*	Funding Amount	Actions
Statement Der Trans. Date≎ 03/22/2015	Vendor Name ¢ TOPS MARKETS #042	Trans. Description © Grocery Stores, Supermarkets	Account Number(s) 9001740000	Trans, Amount - \$14.99	Funding Amount \$14.99	Actions P View
Statement Der Trans. Date¢ 03/22/2015 03/31/2015	Vendor Name 0 TOPS MARKETS #042 RACHELS MEDITERRANEAN	Trans, Description 0 Grocery Stores, Supermarkets Eating Places, Restaurants	Account Number(s) 9001740000 9001740000	Trans. Amount ~ \$14.99 \$176.00	Funding Amount \$14.99 \$176.00	Actions P View P View
Statement Det Trans. Date© 03/22/2015 03/31/2015 03/28/2015	tail Vendor Name © TOPS MARKETS #042 RACHELS MEDITERRANEAN RACHELS TECHNOLOGY	Trans, Description ¢ Grocery Stores, Supermarkets Eating Places, Restaurants IT SUPPLIES	Account Number(s) 9001740000 9001740000 8097270000 8405380000	Trans. Amount - \$14.99 \$176.00 \$186.25	Funding Amount \$14.99 \$176.00 \$186.25	Actions P View P View P View

- 4. Once completed, click the **Cert Print** button to print the certification screen. It may be necessary to allow pop ups for the screen to appear.
- 5. When the preview displays, scroll down, select **Print** and then choose **Print** again.
- 6. Complete and sign the printed form and attach it to your Citibank monthly statement with receipts. Interoffice them to **Pcard Administrator**, **Procurement Office**, **Zip 6000**
- 7. To certify additional statements, select the oldest non-certified statement from Statement Cycle menu. To exit the system, click Sign out in the top right.