OVERVIEW

PCard supporting documentation is electronically “attached” to PCard transactions at the time they are verified or approved.

For instructions on how to process transactions see the “Approving or Verifying a PCard Transaction in myUFL 9.1” Instruction Guide.

STEPS

1. Save the image of the documentation to be attached to the transaction. The saved documentation can be things such as a scanned receipt, an email, a web page, or an electronic invoice. More than one document can be attached to a transaction.

2. Identify the transaction to be verified or approved. Click on the “Comments” icon (it looks like a cartoon dialogue balloon):
3. Click the “Attach” button:

4. Click the “Browse” button and select the document to be attached. Then click the “Upload” button.
Once the document is uploaded, click “OK”. Under “Associated Document” you can see the document which is being attached. To add additional documents click the plus sign located in the upper right corner.

1. To confirm the document was attached; simply look at the Comments icon. When there is an attachment the Comments icon’s appearance changes as shown below:

Please note – this icon indicates the presence of a comment and or image.
**Instruction Guide**

**Attaching Images to PCard Transactions**

2. Proceed to verifying and/or approving the charge by adding a description and changing the chartfield as necessary. See the “Approving or Verifying a PCard Transaction in myUFL 9.1” Instruction Guide for instructions.

3. **Save** the transaction.

**If needed, to review documentation after transactions are closed:**

This process is used only if you need to review a document after it is closed. It is not intended to be used to confirm if attachments exist.

This process assumes you know how to find a voucher number and to run a query.

One method way to locate an image once it has been attached to a closed transaction is to use the UF_PCARD_VOUCHER_XWALK query to identify the transaction number.

**STEPS**

1. Identify the transaction number in the query. This number will begin with “TXN.”

![Image of UF_PCARD_VOUCHER_XWALK query](image)
Attaching Images to PCard Transactions

2. Now that the transaction number has been identified, navigate back to the “Reconcile Statement” page.

3. Enter the “Transaction Number” and change the “Statement Status” to “Closed”. Additional search criteria are not required but may allow the search to run faster.

4. Click “OK”.

5. The image can be found in the Comments icon as described in step 5 above.
For further assistance, please contact the Purchasing HelpDesk at 352-392-1335 or email pcard@ufl.edu, with any questions regarding this process.