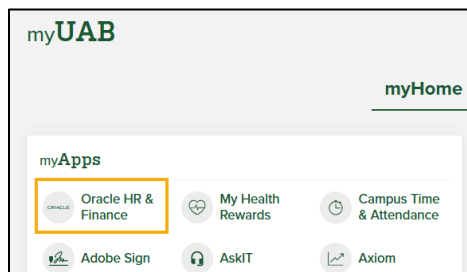


Step 1

Log in to Oracle HR & Finance

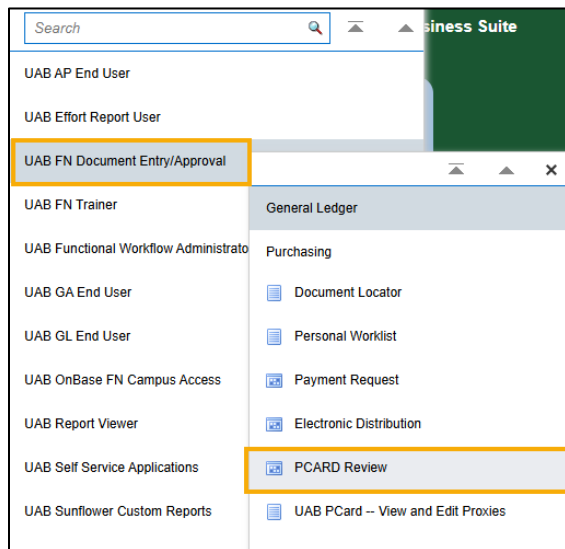
- Navigate to [myUAB Portal](#)
- Locate and click Oracle HR & Finance



Step 2

Navigate to PCARD Review

- Click the 3-lined navigation button in the top left of the Oracle homepage
- From UAB FN Document Entry/Approval, choose PCARD Review



Step 3

When the Java form launches:

- Select the transaction you want to review
- Click Open

PCARD Review Number	Creation Date	Statement Date	Card Last 4 Digit	Card Holder Name	Merchant	Amount	Status	Proxy
6900518	10-JAN-2023	04-JAN-2023			AMAZON.COM AMZN.COM/BILL	-3.82	INCOMPLETE	<input checked="" type="checkbox"/>
6900516	06-JAN-2023	29-DEC-2022			STAPLS0205456045000001	39.60	INCOMPLETE	<input checked="" type="checkbox"/>
6900514	06-JAN-2023	30-DEC-2022			STAPLS0205467884000001	21.26	INCOMPLETE	<input checked="" type="checkbox"/>

Step 4

The PCARD Review Form will load

- All fields in the form are locked for editing, except Payment Type

PCARD Review Form

PCARD Review Number: 6900554
 Payment Type: **PCARD**
 Supplier Number: 855033
 Supplier Name: US BANK PCARD
 Supplier Site: A-MINNEAPOLIS

Card Holder Name: [REDACTED]
 Submitted By: [REDACTED]
 Status: INCOMPLETE
 Submit Date: [REDACTED]
 Documentation:
 Total Amount: 21.26

Name On Card: ADMIN,UAB FA
 Last 4 Card Num: 1234
 Statement Date: 30-DEC-2022
 Merchant Name: STAPLS0205467884000001
 Purchase Reference: 24164072363105270368029-1-12302022

Customer Code: 0205467884
 Purchase Identifier: 52064
 VCF Tax Amount: 0
 User Tax Amount: [REDACTED]

Buttons: Submit, Add Documentation, Log, Review List

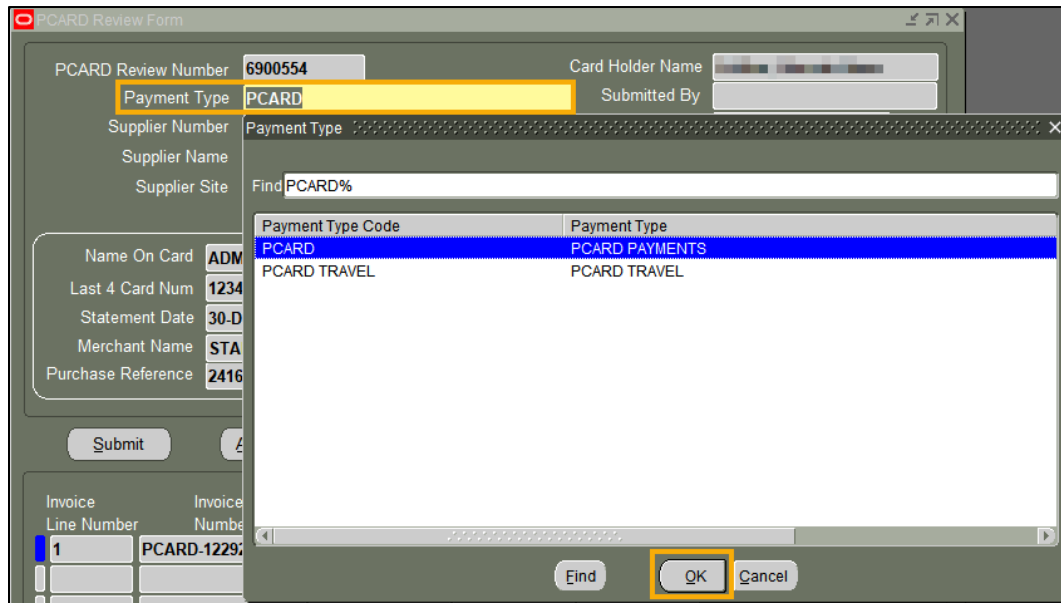
Invoice Line Number	Invoice Number	Invoice Date	Invoice Amount	Distribution Total
1	PCARD-122922-4164	29-DEC-2022	21.26	21.26

Buttons: Distribution, View All Distributions

Step 5

Select the appropriate Payment Type

- Payment Type defaults to PCARD
- If this is a Travel-related payment, select PCARD TRAVEL



The screenshot shows the 'PCARD Review Form' window. The 'Payment Type' field is highlighted in yellow and set to 'PCARD'. A dropdown menu is open, showing a search bar with 'PCARD%' and a list of options: 'PCARD' (highlighted in blue), 'PCARD TRAVEL', 'PCARD TRAVEL', 'PCARD TRAVEL', and 'PCARD TRAVEL'. The 'OK' button is highlighted in yellow.

Payment Type Code	Payment Type
PCARD	PCARD PAYMENTS
PCARD TRAVEL	PCARD TRAVEL
PCARD TRAVEL	PCARD TRAVEL
PCARD TRAVEL	PCARD TRAVEL
PCARD TRAVEL	PCARD TRAVEL

Step 6

Enter the Business Purpose for the transaction

- Click Add Documentation
- Enter the UAB business purpose for the expense
- Click the Save button in the toolbar before closing the PCARD Review Documentation window
- Close the *PCARD Review Documentation* window to return to the PCARD Review Form

The screenshot shows a web browser window with two tabs: "PCARD Review Form" and "PCARD Review Documentation".

PCARD Review Form (Left Panel):

- PCARD Review Number: 6900554
- Payment Type: PC
- Supplier Number: 855033
- Supplier Name: US BANK PCARD
- Supplier Site: A-MINNEAPOLIS
- Name On Card: ADMIN,UAB FA
- Last 4 Card Num: 1234
- Statement Date: 30-DEC-2022
- Merchant Name: STAPLS0205467884000001
- Purchase Reference: 24164072363105270368029
- Buttons: Submit, Add Documentation
- Invoice Table:

Invoice Line Number	Invoice Number	Invoice Date
1	PCARD-122922-4164	29-DEC-2022

PCARD Review Documentation (Right Panel):

- PCARD Review Number: 6900554
- Status: INCOMPLETE
- Creation Date: 28-FEB-2023
- Supplier Number: 855033
- Supplier Name: US BANK PCARD
- Supplier Site: A-MINNEAPOLIS
- Submit Date: (empty)
- Expenditures for which payment is being requested:

SNo.	Transaction Date	Item Description	Amount
1.	12/29/22	DURACELL COPPERTOP AA ALKA	\$21.26
- Explain the UAB business purpose for the expense:

STAPLS0205467884000001 877-8267755 GA-30349

Batteries purchase for office electronics.

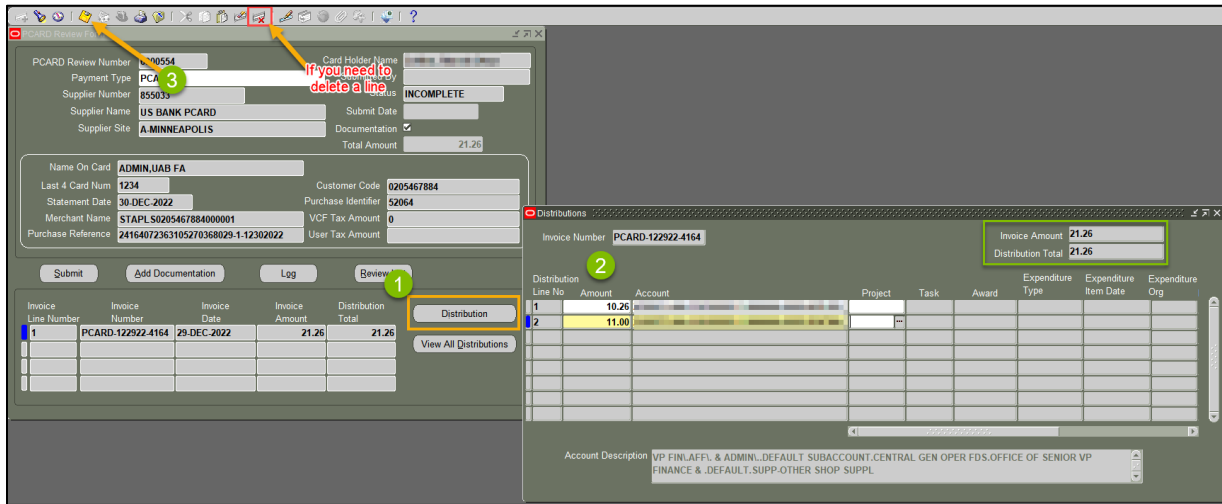
Callouts: 1 points to the "Add Documentation" button; 2 points to the business purpose text area; 3 points to the "Supplier Name" field.

Step 7

Enter account distributions

- Click Distribution
- On Line 1, select and **remove** the *default placeholder Account*
- Enter your Account ([General Ledger](#)) or [PTAOE](#)
- For Split Distributions, add line(s) and enter charge Amount per line until Distribution Total equals the Invoice Amount
- Click the Save button in the toolbar **before** closing the Distributions window
- Close the Distributions window to return to the PCARD Review Form

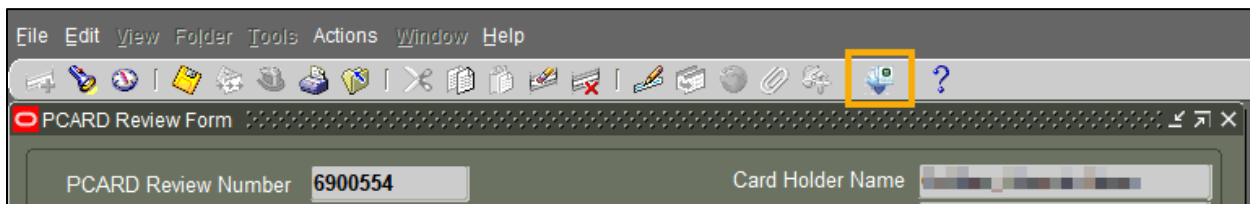
Note: To delete an unneeded Distribution Line, with the line selected, click the Delete button on the toolbar. You cannot delete Line 1.



Step 8

Upload receipts/invoices and supporting documents

- Click the OnBase button on the toolbar to pull transaction details into the OnBase client
- You may be required to login to OnBase with your BlazerID and Strong Password



Step 9

Import your supporting documentation (receipts, invoices, etc.) into OnBase

- See [PCARD Review: Importing Documentation to OnBase](#)

Step 10

Once OnBase is closed, return to your Oracle window to submit the PCARD Review Form

- Click Submit
- Answer the Decision prompt if you are ready to submit
- The form has now been submitted to workflow for review and approval

PCARD Review Form

PCARD Review Number: 6900554
Card Holder Name: [REDACTED]
Payment Type: PCARD
Submitted By: [REDACTED]
Supplier Number: 855033
Status: INCOMPLETE
Supplier Name: US BANK PCARD
Submit Date: [REDACTED]
Supplier Site: A-MINNEAPOLIS
Documentation:
Total Amount: 21.26

Name On Card: ADMIN,UAB FA
Last 4 Card Num: 1234
Statement Date: 30-DEC-2022
Merchant Name: STAPLS0205467884000001
Purchase Reference: 24164072363105270368029-1-12302022
Customer Code: 0205467884
Purchase Identifier: 52064
VCF Tax Amount: 0
User Tax Amount: [REDACTED]

1

Decision: Changes will not be allowed for this Request Once it is Submitted for Approval..... Continue ?
2

Invoice Line Number	Invoice Number	Invoice Date
1	PCARD-122922-4164	29-DEC-2022