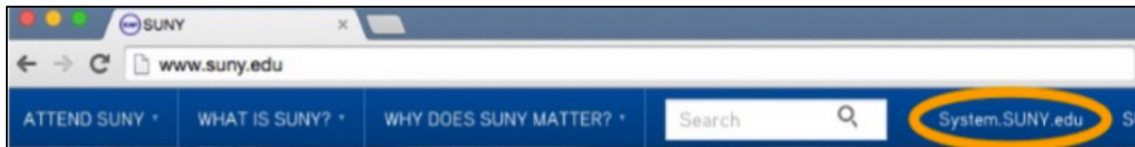


P-Card Web App Certification Instructions

Accessing the Web App

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



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**



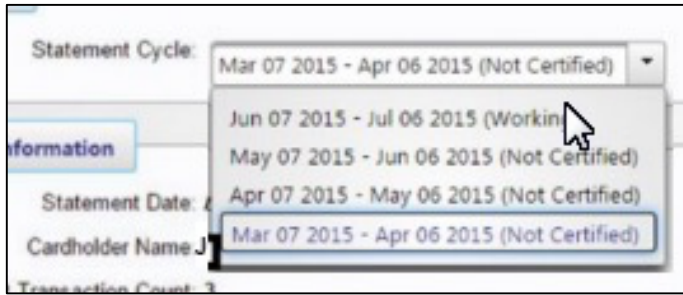
5. If prompted, enter your NetID and NetID password to login
6. Near the top left under Business Systems Applications, select **Finance & Management System**

Review Transactions

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



- 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)



- 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:

- 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

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

- 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**)

2. Reallocating to Split Accounts:

- 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**.

Funding Line

* Account Number: **8405380000 - Client Support**

* Sub Object Code: **530010 - TONER**

* Fiscal Year: **2014** * Amount: **100**

Funding Description: **First Split**

Save / Add Next Account **Save & Return**

- 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.

Statement Detail

Trans. Date	Vendor Name	Trans. Description	Account Number(s)	Trans. Amount	Funding Amount	Actions
03/31/2015	RACHELS MEDITERRANEAN	Eating Places, Restaurants	9001740000	\$176.00	\$175.00	Edit
03/28/2015	RACHELS TECHNOLOGY	IT SUPPLIES	8097270000 8405380000	\$186.25	\$186.25	Edit
03/22/2015	TOPS MARKETS #042	Grocery Stores, Supermarkets	9001740000	\$14.99	\$14.99	Edit
Statement/Funding Total:				\$377.24	\$376.24	

Save

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

Statement Detail

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

✓ Certify

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

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.

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

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.