Approval Steps – SFS P-Card Module

- Review Business Purpose
- Review/Add Attachments
- Review/Update Funding Source
- Review Level 3 Data (Optional)
- Approve Transaction(s) or Send Back Transaction(s)

Login to SFS

https://www.wisconsin.edu/sfs/sfs-environments/ - Click SFS Production link

Navigate to Reconcile Statement Page

1. Click on the NavBar icon in the top right-hand corner.

2. Click Navigator.

3. Navigator: Click “Purchasing” → “Procurement Cards” → “Reconcile” → “Reconcile Statement”
The Reconcile Statement page or the Reconcile Statement Search page will appear.

4. If the Reconcile Statement Search page appears, click “Clear” button at bottom of page to empty criteria.

5. Click the drop-down menu next to “Statement Status”, select “Verified”, and then click “Search”.
   a. Transactions requiring approval will be in the “Verified” status.
Approvers can also navigate directly to the reconcile statement page for all transactions requiring their approval by clicking the hyperlink included within the automatic email notifications they receive.

![Procurement Card Transaction(s) Require Your Approval]

Please use the below link to access the Procurement Card Transactions requiring your approval:

https://test.sfstest.wisconsin.edu/psp/sfa_16/EMPLOYEE/ERP/c/MANAGE_PROCUREMENT_CARDS.CC_RECON_WB.GBL?CC_STATUS=2,TRANS_DT=

**Review Business Purpose**

1. Click on the quote icon under the “Business Purpose” column.

![Procurement Card Transactions]

2. Review the business purpose justification.
   a. Approvers are not able to update or change the business purpose.
   b. Click “OK” to exit.

![Business Purpose]

**OK**  **Cancel**  **Refresh**
Review/Add Attachments

1. Click the paper clip icon underneath the “Attachments” column.

2. Click “View” button to review attachments and receipts.

3. Approvers can add attachments themselves by clicking the “+” button off to the right.
   a. Then click the “Attach” button to browse and upload files.
   b. Click “OK” when finished.
Review/Update Funding Source

1. Review the funding string under the “Accounting Code” column.

2. If the funding needs to be changed click the distribution icon under the “Distribution” column.

3. Update the accounting code(s) as appropriate.
   a. If adding a Project code to the Chartfields, “PC Bus Unit” is a required input. The “PC Bus Unit” is UWSYS.

4. Click “OK” when finished.

Review Level 3 Data (Optional)

1. The column with the Level 3 p-card transaction data will be directly to the right of the “Chartfield Status” column. To view Level 3 data, click the below icon.
a. The column with this data will be visible **only** if the transaction(s) displayed on the page have Level 3 data. If none of the transactions have Level 3 data, the below column will not appear.

### Approve Transaction(s) (Last Step)

1. Use drop down in “Status” column to select Approved on each transaction.

OR

Click the check box on the far left for individual transactions and click the “Approve” button at the bottom of the page.

a. “Select All” can also be selected, if approving all transactions.

2. Click “Save” button at bottom of screen. Wait for the green saving page bar at the top of screen to disappear.

The transaction(s) are now approved and ready to be picked up for vouchering.

### Send Back Transaction(s) for Revision (Last Step)

1. If a transaction is not adequate for approval it can be sent back to cardholder. Scroll all the way to the far-right column and click the quote icon below the “Comments” column.
2. Type in reason for sending back transaction and click “OK”.

3. Use drop down in “Status” column to select “Staged” on each transaction.

   OR

   Click the check box on the far left for individual transactions and click the “Stage” button at the bottom of the page.

   a. “Select All” can also be selected, if sending back all transactions.

4. Click “Save” button at bottom of screen. Wait for the green saving page bar at the top of screen to disappear.

The above actions place the p-card transaction back on the cardholder’s reconcile statement page. The cardholder (reconciler) will receive an email notification the next business day.