Access Online – PCard Receipt Upload

A PDF Receipt must be attached to each and every transaction. Only one file can be attached per transaction. Thus, if you have multiple pages, it will need to be saved as a single PDF file. The file must contain a receipt and any other available backup documentation which supports the purchase such as, packing slips, email confirmations, shipping confirmations, etc.

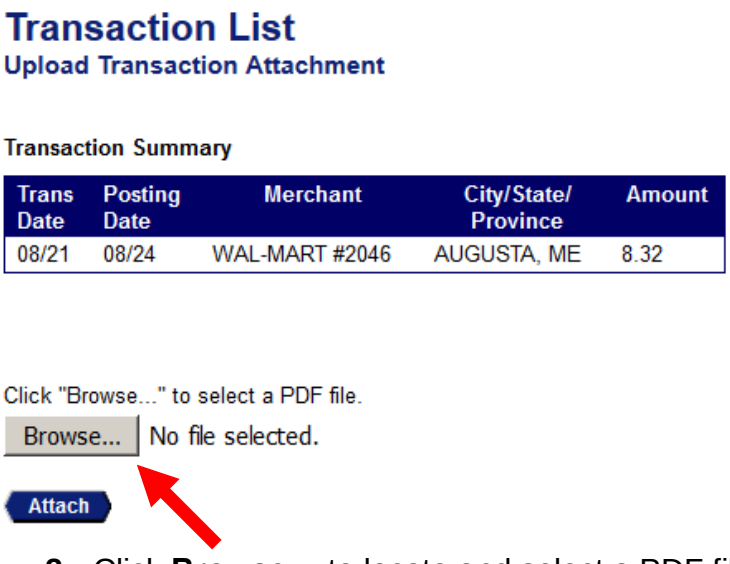
- Your attachment needs to be a Portable Document Format (PDF) file.
- Please save your files as a PDF.

Instructions:

A PDF receipt file can be uploaded from the **Transaction List** or **Transaction Detail** screens.

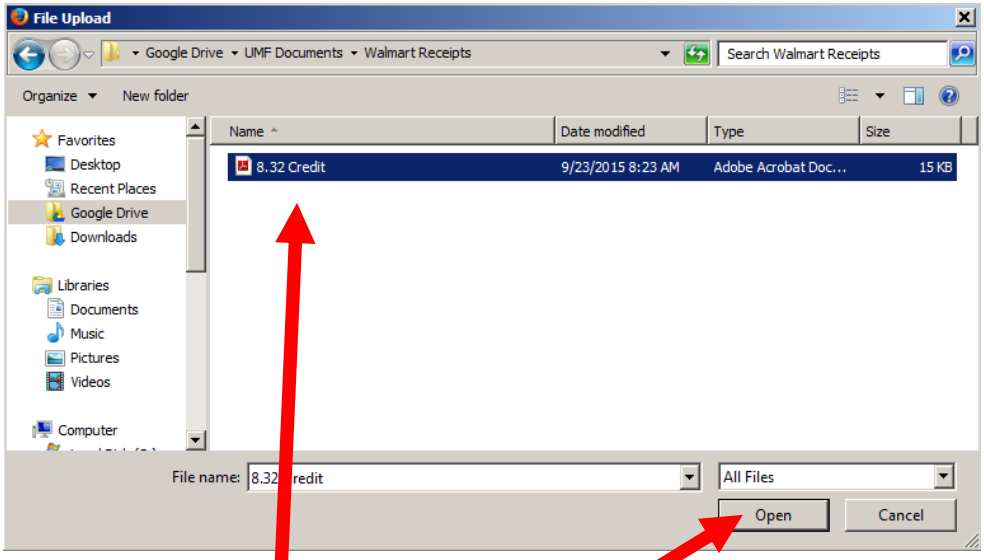
From the **Transaction Detail** screen:

1. Click the **Paperclip** under **Attachment**.

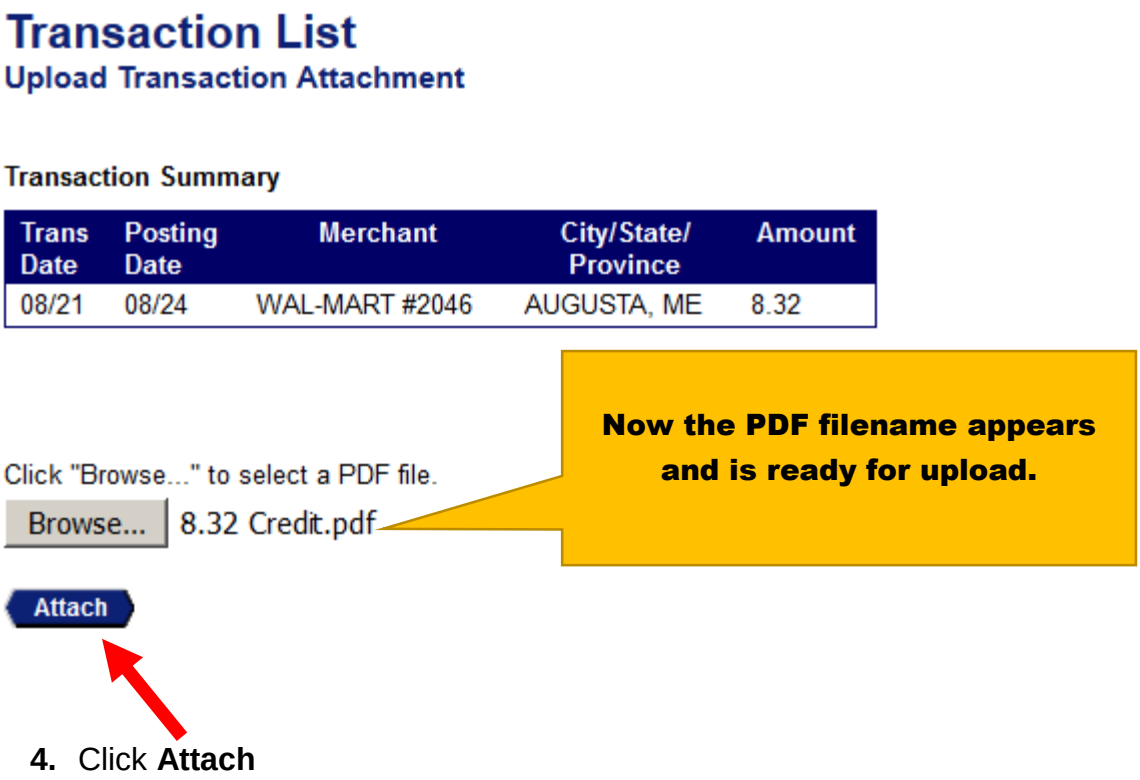


2. Click **Browse…** to locate and select a PDF file saved on your system.

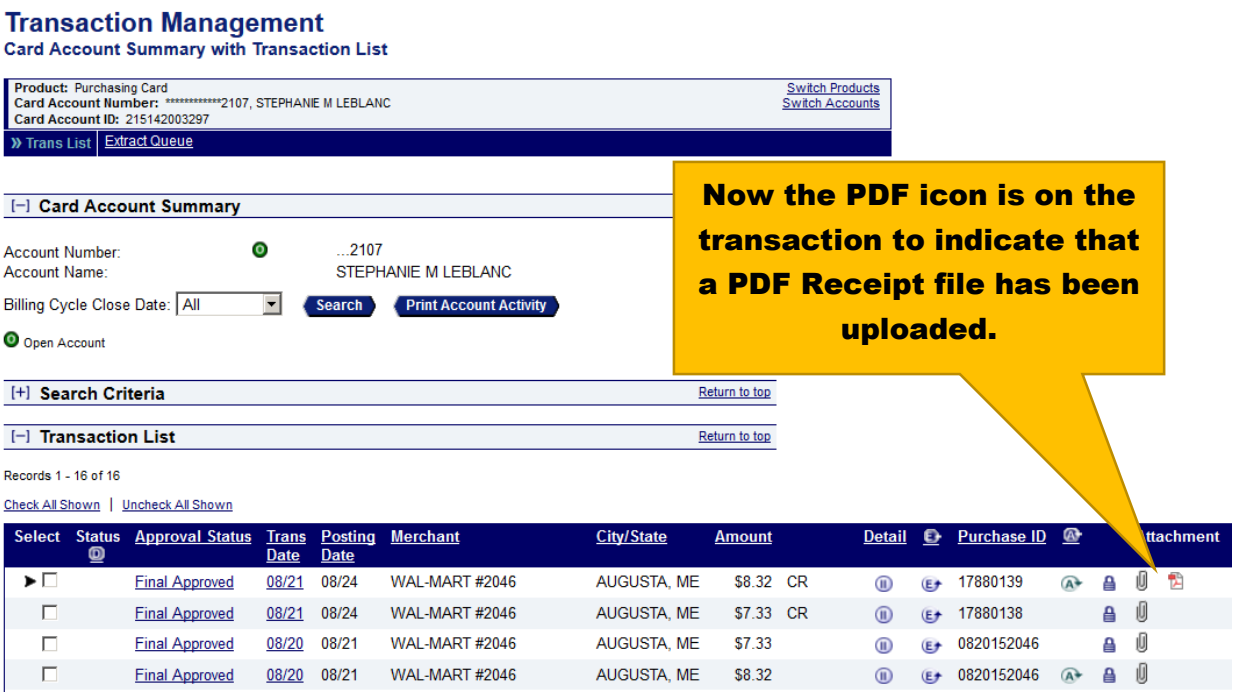
- Your attachment needs to be a Portable Document Format (PDF) file. Please save your files as a PDF.



3. Select the **PDF file** and click **Open**

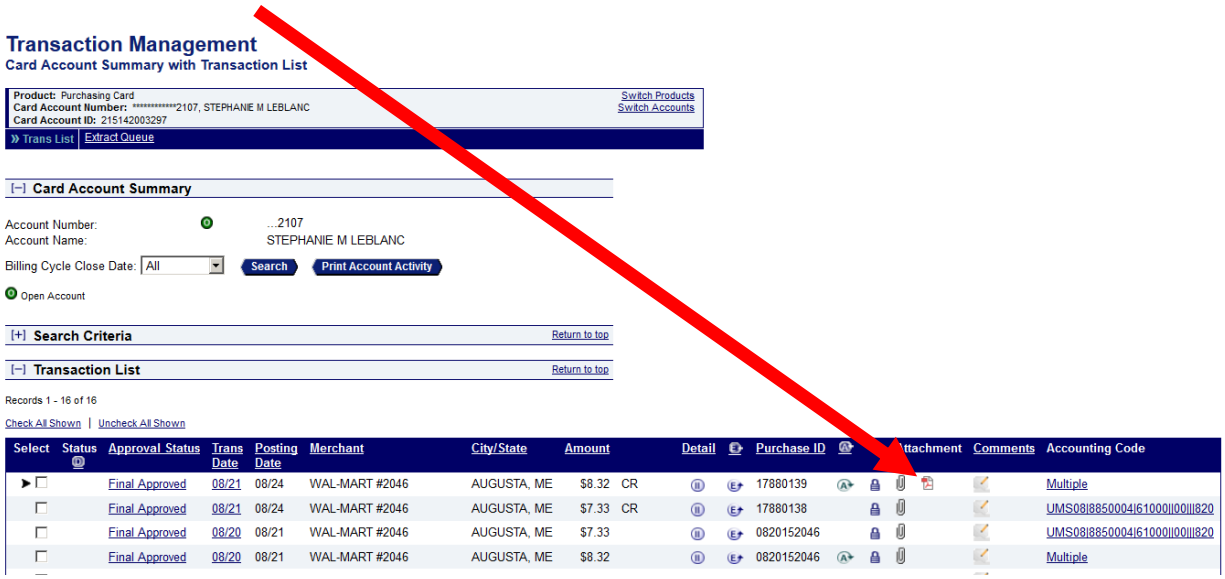


4. Click **Attach**



5. As a reminder, for all transactions:

    a. A **PDF Receipt** must be uploaded
    b. Expenses must be allocated to the correct **Chartfield combination(s)** on the **Allocations** tab
    c. **Purpose of Purchase** must be entered on the **Comments** tab
    d. Transaction must be approved on the **Summary** tab and sent to an Approval Manager for final approval
    e. **Approval Managers** must review the aforementioned areas and final approve, return, or approve and forward for additional approval transactions within his/her **Manager Approval Queue**.

To view the PDF receipt:

Click the **PDF icon**. The PDF will open in a separate window.