

Overview of Changes in PCard

September 1, 2019

This overview contains information about changes from the SWIFT Limited Upgrade to the Procurement Card (PCard) pages, including:

- Navigate to PCard Module Using Tile-Based Navigation
- Open PCard folders and pages
- Other Module-Wide Changes

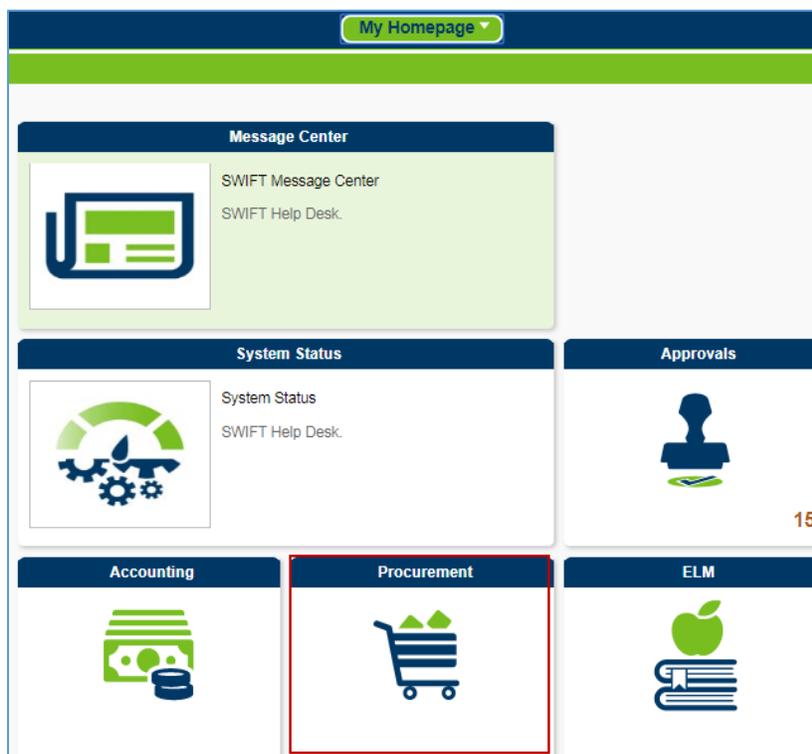
While the update to SWIFT will have a new look and feel, this upgrade will not affect how most PCard processes are completed.

Note: There may be some changes to this information, since SWIFT Limited Upgrade testing is still in progress. **Questions?** Contact the SWIFT Help Desk: SWIFT.project@state.mn.us.

Navigate to PCard Module Using Tile-Based Navigation

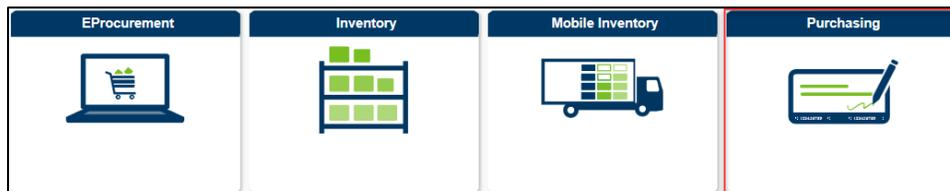
Navigate to the PCard module by selecting tiles. All employees will see Message Center, System Status, ELM, and Self Service tiles. Additional tiles may or may not display, depending on your security roles.

1. From the *Homepage*, select the **Procurement** tile.

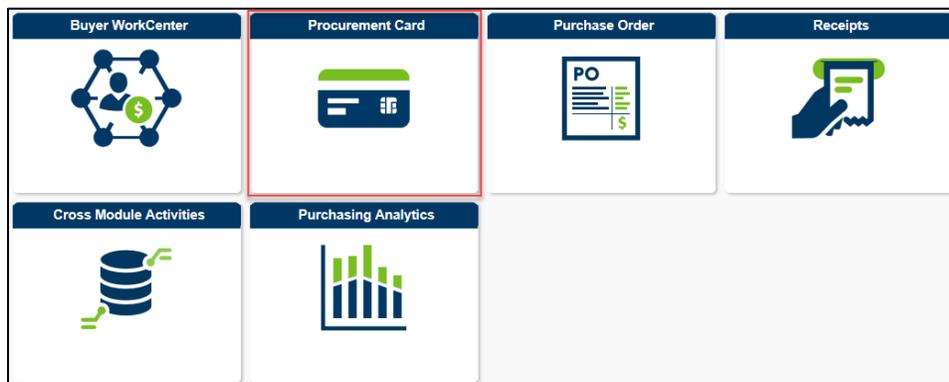


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2. Select the **Purchasing** tile to find the PCard module.



3. Select the **Procurement Card** tile to access the PCard module.



Open PCard folders and pages

1. In the PCard module, select a left-menu folder to access PCard pages. Left-menu folders include:
 - *Reconcile*: pages to reconcile transactions
 - *PCard Set Up*: pages to set up cardholder profiles and proxies
 - *Reports*: pages to run reports on cardholder information
 - *Process Statements*: pages to correct errors
2. After you select one of the folders, select a page, which will open in the work area to the right. For example, to begin searching for PCard transactions, select *Reconcile Statement*.

Reconcile Statement Search

Role Name

Employee ID

Name

Card Issuer

Card Number

Transaction Number

Merchant Exact Match

Sequence Number

Line Number

Billing Date To

Statement Status

Budget Status

Chartfield Status

Transaction Date To

Charge Type

Posted Date To

Rows Per Page

Auto Save When Scrolling Through Chunks

Other Module-Wide Changes

- **Accounting tags:** SpeedCharts are now called Accounting tags.
- **Suppliers:** Vendors are now called Suppliers.