SUNY Buffalo
WebConnect— PCard Certification Manual

Revised 3/17/2015
# SUNY Buffalo WebConnect Support

| Questions related to your UBITName or password: | CIT Help Desk, 645-3542  
cit-helpdesk@buffalo.edu  
Online help with your UBITName and password |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| **Questions related to security, requesting access, deleting access, security sign-on violations and password resets:** | Michelle McCartney, 645-2606  
mam10@buffalo.edu  
Tricia Canty, 645-2639  
tscanty@buffalo.edu |
| **Questions related to system connectivity or other technical issues:**  
(e.g., a Java Virtual Machine is required to use WebConnect applets error) | Find and contact your IT support team |
| **Questions related to the State Procurement Card reconciliation and certification process:** | Angie Rzeszut, 645-4533  
rzesz@buffalo.edu  
Mary Kvetkosky, 645-4531  
mfk3@buffalo.edu  
PCard information and resources are available on the Web at buffalo.edu/pcard |
SUNY Employee Services Portal Login

1. In a web browser, **type** in the URL: [http://www.suny.edu](http://www.suny.edu)

2. Click on **System.SUNY.edu** in the upper right-hand corner as indicated in Figure 1.

![Figure 1 – SUNY home page](image)

3. **Click** on SUNY Portal, located under Employee Resources, as indicated in figure 2.

![Figure 2 – SUNY System page](image)
4. Select **Buffalo Univ** from the drop down box pictured in figure 3 and **click** on the Login button.

![Figure 3 – Accessing the Security Login screen](image)

5. **Type** your UBITName and password. **Click** the Log In button to begin the authentication process. Log in assistance is provided to you by clicking on the links below the Log In button.

![Figure 4 – The identifying fields required to authenticate a user](image)
6. Click on **E-Business Services** as shown in Figure 5, and then click on **WebConnect** as shown in Figure 6.

If WebConnect does not appear as shown in figure 5, please contact WebConnect application support (Page 2).

NOTE: If the WebConnect page is not activated you may need to unblock POP-UPS in your browser.
Upon selecting WebConnect, prior to receiving the “Connect to System Administration SUNY BUF” option, you may receive screens as seen in figures 7 and 8. Check the ‘Do not show this again.....’ box and Click ‘Allow’ and ‘Run’ respectively.
7. The WebConnect application appears, **click** on Connect to System Administration – SUNYBUF. This will bring you to the SUNYBUF screen SUNY Inter-Campus Data Network.

![Figure 9 - WebConnect Page](image)

8. Enlarge the screen. Use your mouse to **click on PF9** on the key pad at the bottom of the screen.

![Figure 10 - SUNYBUF Page](image)
9. **Type** 1 and press **ENTER**.

![Figure 11 – SUNYBUF Main Menu](image1.png)

10. The CICS screen will appear. Clear this screen by clicking on the **CLEAR** button as shown in figure 13. Now type **SCSO** in the upper left-hand corner and press **ENTER**.

![Figure 12 - SUNYBUF Page](image2.png)
11. This will bring up your Security Sign-On screen. Type in your assigned sign-on information (use the tab key to move from field to field), then press ENTER.

<table>
<thead>
<tr>
<th>ORG TYPE</th>
<th>SU</th>
</tr>
</thead>
<tbody>
<tr>
<td>USER ID</td>
<td>Type the user ID that was previously assigned to you for PCard reconciliation</td>
</tr>
<tr>
<td>PASSWORD</td>
<td></td>
</tr>
<tr>
<td>JOB FUNCTION</td>
<td>Type the job function that was previously assigned to you for PCard reconciliation</td>
</tr>
<tr>
<td>PRINT DESTINATION</td>
<td>NONE</td>
</tr>
</tbody>
</table>

If you forget or do not know your USER ID, forget your password or you get a maximum violation while signing-on, please contact WebConnect application support (Page 2). If your password has expired, type in a new password in the new password field and press enter. You will be prompted to click F1 on the key pad to complete the password change.

12. Use the mouse to click on CLEAR on the key pad then type AEPC. Press ENTER.

13. Change the date to the correct billing cycle.

**IMPORTANT** If you need to reallocate any charges to an alternate account, you must do it now. See last page for instructions.
14. **Tab to VI02**—Reconciliation/Certification and press **ENTER**. Review your transactions listed on the screen. To view multiple items, in the lower right-hand corner, place the cursor in the field called “Paging” and type an F to page forward and press ENTER.

Look for this statement at the bottom of the screen: **AE0041 Ready for Cardholder Certification - All Items Matched.** If this statement does not appear, contact the Procurement Card Administrator before continuing. You might be missing transactions. See Figure 14.

15. After you’ve finished reviewing the transactions, in the lower right-hand corner, **type an X** in the Function field (F=>X) and **type a C** in the Action field (A=>C). Press **ENTER**. See Figure 14.

![Figure 14 - List of Transactions](image)

16. On the next screen, in the lower right-hand corner, **type a C** in the Function field (F=>C) and **type an E** in the Action field (A=>E). Press **ENTER**. Your name and the date will appear mid screen. Press **ENTER again** to certify your charges. You will return to the main menu and see Transaction Completed at the bottom of the screen. Within a few days, the money will transfer from your state account(s).

17. Certification is complete. **To sign off**, click on the **CLEAR** button, **type OFF** and press **ENTER**. Close the window to the SUNY Inter-Campus Data Network screen, log off SUNY WebConnect and sign off of the SUNY Employee Portal in the upper right-hand corner. Obtain your supervisor’s signature on the Citibank statement you printed from https://home.cards.citidirect.com. Retain all original receipts, order forms and statements for a minimum of six years plus the current year, within the department. The NYS Comptroller or UB may audit all Procurement Card accounts.
Changing Accounts Prior to Certifying in SUNY WebConnect

The following instructions describe how to change the account number associated with your PCard transactions in SUNY WebConnect.

1. Sign on as usual (Tip: Make sure you are in the correct billing cycle, for example: 0914 for the September 2014 statement).

2. Tab to VI03 Log List, hit enter.

3. Tab to transaction that is to be changed.

4. Type an “X” on the green line next to the transaction affected, hit enter.

5. You will now be on the transaction screen.

6. Tab down to account information in the lower part of your screen to the amount column.

7. Overtype the dollar amount in the column with a 0, delete any remaining numbers.

8. Tab down to the next line (it will be blank).

9. Type the new account number, NBR (sub account), FY (fiscal year), and the amount. Copy all information down from the upper line except for the account number.

10. At the F in the lower right corner, type S to save (F=>S).

11. At the A in the lower right corner, type R to go back to the log list and select another transaction or E to go back to the main menu (A=>R to return to list) or (A=>E to return to menu).

You can process changes at any time during the month once the transaction appears on the VI03 log list. **You must do this before you do your final certification.** If changes are needed after the certification is complete, then you will need to process an Interdepartmental Invoice (IDI) to transfer the expenditure to a different account. The status of the account could affect this process.

If processing several changes, it may be easier to retrieve the assigned log numbers of the transactions from the VI03 list. Note the log numbers, then return to the main menu (A=>E). Type the log number in the CARDHOLDER LOG NBR field and press enter. You will need to go into each log number, separately, to make the change.