

SUNY Buffalo WebConnect— PCard Certification Manual

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 <u>mam10@buffalo.edu</u> Tricia Canty, 645-2639 <u>tscanty@buffalo.edu</u>
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 <u>IT support team</u>
Questions related to the State Procurement Card reconciliation and certification process:	Angie Rzeszut, 645-4533 rzeszut@buffalo.edu Mary Kvetkosky, 645-4531 mfk3@buffalo.edu PCard information and resources are available on the Web at <u>buffalo.edu/pcard</u>

SUNY Employee Services Portal Login

- 1. In a web browser, **type** in the URL: <u>http://www.suny.edu</u>
- 2. Click on System.SUNY.edu in the upper right-hand corner as indicated in Figure 1.



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



Figure 2 – SUNY System page

4. Select **Buffalo Univ** from the drop down box pictured in figure 3 and **click** on the Login button.

SUNY SECURE Sign On Please select your campus, then enter the appropriate credentials below. Help
Campus:* Buffalo Univ ▼ Remember me? □ Login
UNAUTHORIZED ACCESS PROHIBITED Copyright 9 2013 The State University of New York AI RIGHTS RESERVED. Contact Us :: WEB ACCESSIBILITY :: Privacy Rollow

Figure 3 – Accessing the Security Login screen

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.

чь	niversity at Buffalo. The State University of New York	
	Login Required	
	Login Required	
	UBITName	
	Password	
	Log In	
	I don't know my password Find my UBITName	
	• Help	

Figure 4 – The identifying fields required to authenticate a user

6. Click on **E-Business Services** as shown in Figure 5, and then click on **WebConnect** as shown in Figure 6.



Figure 5 - Employee Services Page

Survise Employee Services Po	ortal				Portal Home	Reports	Sign Off	Contact Us
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					My Profile (-)			
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SIMS - State					my roots (+)			
Webconnect					SUNY Online	Directory		
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					Would you like	to add some	personal Link	<u>\$7</u>
Training/Presentation Materials Transfer System - SUMY Emergency Alert Presentation Materials - Demonstrations - Documents University Systems Strategic Business Plan SUBDA Working Committee Status Meetings Finance and Management WebM space/Training Documents and Procedures Institutional Research Academic Programs Enterprise System (IAPES) Campu Data Tansfer System (IST) Damonstration Institutional Research SUMY Management Resource Data Status Research Sum System (APES) Campu Data Tansfer System (IST) Damonstration Institutional Research SuMY Management Resource Data Security Security Security Administration Tool Manual Security Security Committee Taning Site Sum Status Planting Security	a View Demonstration of ISMETI Demonstration Basics Training	Employee Directory The online directory provides the ability to set SUBY Campus Directories Enter one or more search criteria. Last Name: First Name: Be Sea (Result)	arch for employees in the SURY Cam ins with Contains ch. ClearForm stogen n a new window)	pus Directories.				
SUNY Web Site Content Management OmniUpdate Web-based Training Web Navigation Application Training								

Figure 6 - Employee Services E-Business Services Page

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.

Security Warr	ning
n All	ow access to the following application from this web site?
We	b Site: http://wc.suny.edu:2050
App Put	plication: WebConnect plisher: OpenConnect Systems, Incorporated
Thi: Allo inte	s web site is requesting access and control of the Java application shown above. we access only if you trust the web site and know that the application is ended to run on this site.
Do not	t show this again for this app and web site. Allow Do Not Allow
Figure 7 – Secu	rity Warning

Do you want	to run this	application?
	Name:	WebConnect
<u></u>	Publisher:	OpenConnect Systems, Incorporated
	Location:	http://wc.suny.edu:2050
This application will r information at risk. R	un with unrestri Iun this applicat	cted access which may put your computer and personal ion only if you trust the location and publisher above.
Do not show this	again for apps nation	from the publisher and location above Run Cancel
Figure 8 – Security Warn	ing	

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.

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SUNY The State University of New York	pyright 6 2014 The State University of New York. All rights reserved. deta(1) - 1002 ACCESSIBILITY - Description: 6 V violend to have <u>Joing Reserv</u> Holder to view and petit PDF Res.	

Figure 9 - WebConnect Page

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

9. Type 1 and press ENTER.

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Figure 11 – SUNYBUF Main Menu

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**.

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Edit Setting Help							
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PF1 PF2 PF11 PF12 PF21 PF22	PF3 PF4 PF13 PF14 PF23 PF24	PF5 PF15 PA1	PF6 PF16 PA2	PF7 PF17 PA3	PF18 Clear	PF9 PF19 eset	PF10 PF20 Enter

Figure 12 - SUNYBUF Page

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**.

ORG TYPE	SU
USER ID Type the user ID that was previously assigned to you for PCard reconciliation	
PASSWORD	
JOB FUNCTION Type the job function that was previously assigned to you for PCard reconciliation Example: PCRD-XXXX	PCRD—
PRINT DESTINATION	NONE

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.



Figure 13 – Main Menu

****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 VIO2**—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.

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File Edit Setting Help
09/25/14 STATE UNIVERSITY OF NEW YORK 10:21:02 CITIBANK PROCUREMENT CARD 01 OF 01
CARDHOLDER RECONCILIATION
RECONCILED ITEMS FROM 08/07/14 TO 09/06/14
28030: UNIVERSITY AT BUFFALO
EXTRACTOR CARDOLDER.
DATE VENDOR NAME DATE VENDOR NAME
AMOUNT LOG # AMOUNT LOG #
080514 GREAT LAKES GRAPHICS AND 080514 GREAT LAKES GRAPHICS AND
//5.00 5000013 //5.00 5000013 //5.00 5000013
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FUNCTION: X=IGNORE S=SAVE NEXT BILLING PERIOD: RCN IND: F=> x
ACTION: E=MENU R=RETURN C=CERT STMT A=> c
1=LOG 2=RECON 3=LOG LIST 4=BILL LIST PAGING: F, B OR # =>
ABOWL READY FOR CARDHOLDER CERTIFICATION - ALL TIEMS MATCHED
23/0/9 PF2 PF3 PF4 PF5 PF6 PF7 PF8 PF9 PF10
1 PF12 PF13 PF14 PF15 PF16 PF17 PF18 PF19 PF20

Figure 14 – List of Transactions

- 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.