Procurement Card (P-Card)

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Purpose:

1. New 9.2 URL
2. Navigation (Tiles, WorkCenters, Pagelets & NavBar)
3. Reconcile Statement and Review Disputes – Find New Search Parameters
4. Allow Pop-Up Blocker (IE, Chrome & Firefox)

New 9.2 URL (web page address)

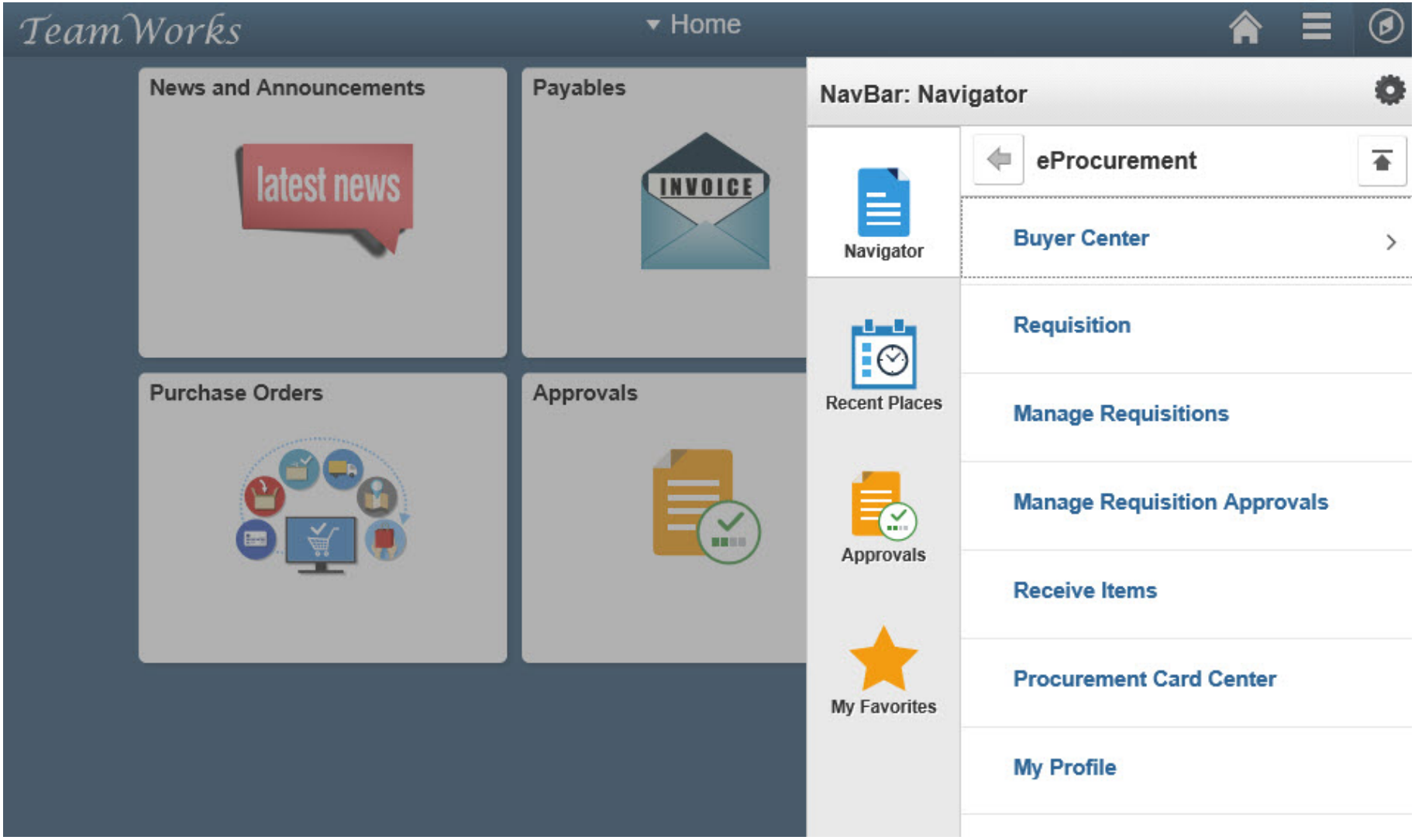
- With the release of Financials 9.2, the URL will change.
- Agencies will need to update any references to the old Financials URL with the new URL.
- Do not be alarmed; temporarily the old URL will go to a redirect page that will list the new URL.
- On October 1st, refer to the TW Financials News and Announcements section, the new URL will be posted there.

Source: SAO News: TeamWorks Financials and TGM 9.2 Upgrade - October 9, 2018 – Reminder Email

Homepage (Tiles)

Fluid homepages appear when user successfully logs in to the TeamWorks Financials/TGM. It contains a collection of tiles that show Procurement and Financials information to the end-user based on security roles. It enables an easy way to navigate around the system.

NavBar: Navigator (Tiles)



WorkCenters

WorkCenters is a new feature in PeopleSoft Financials 9.2. It enables users to access various pages and perform their daily tasks without leaving the WorkCenter, which reduces the time used when navigating through menus.

A WorkCenter is used to increase the productivity of a specific user role by streamlining their work in a central place.

Benefits: Centralized access to relevant data, Reduced need to navigate, Personalized view of workload, configurable and Improved efficiency.

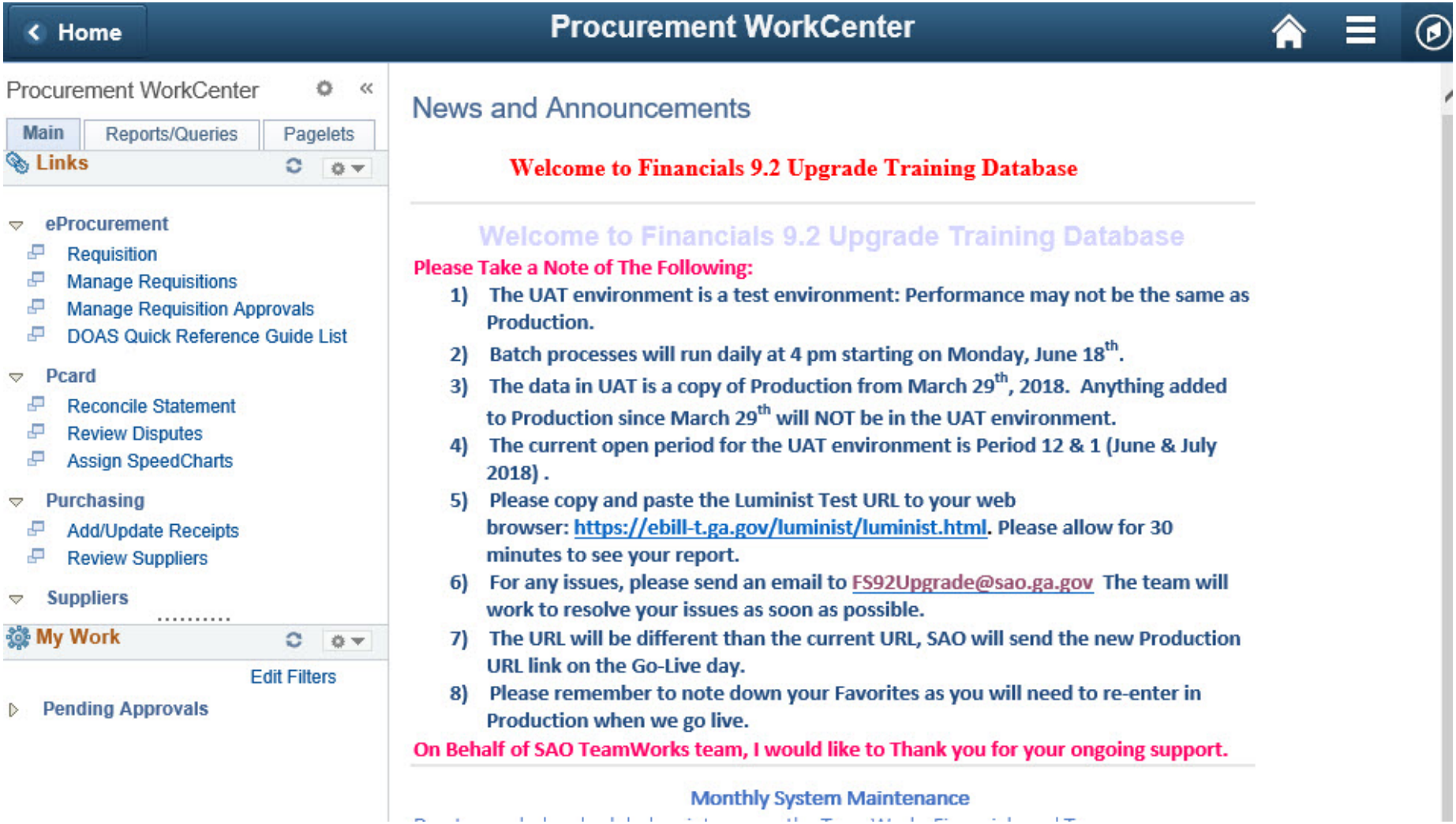
WorkCenters…Continued

Procurement WorkCenter is comprised of three tabs and each tab has one or more sections:

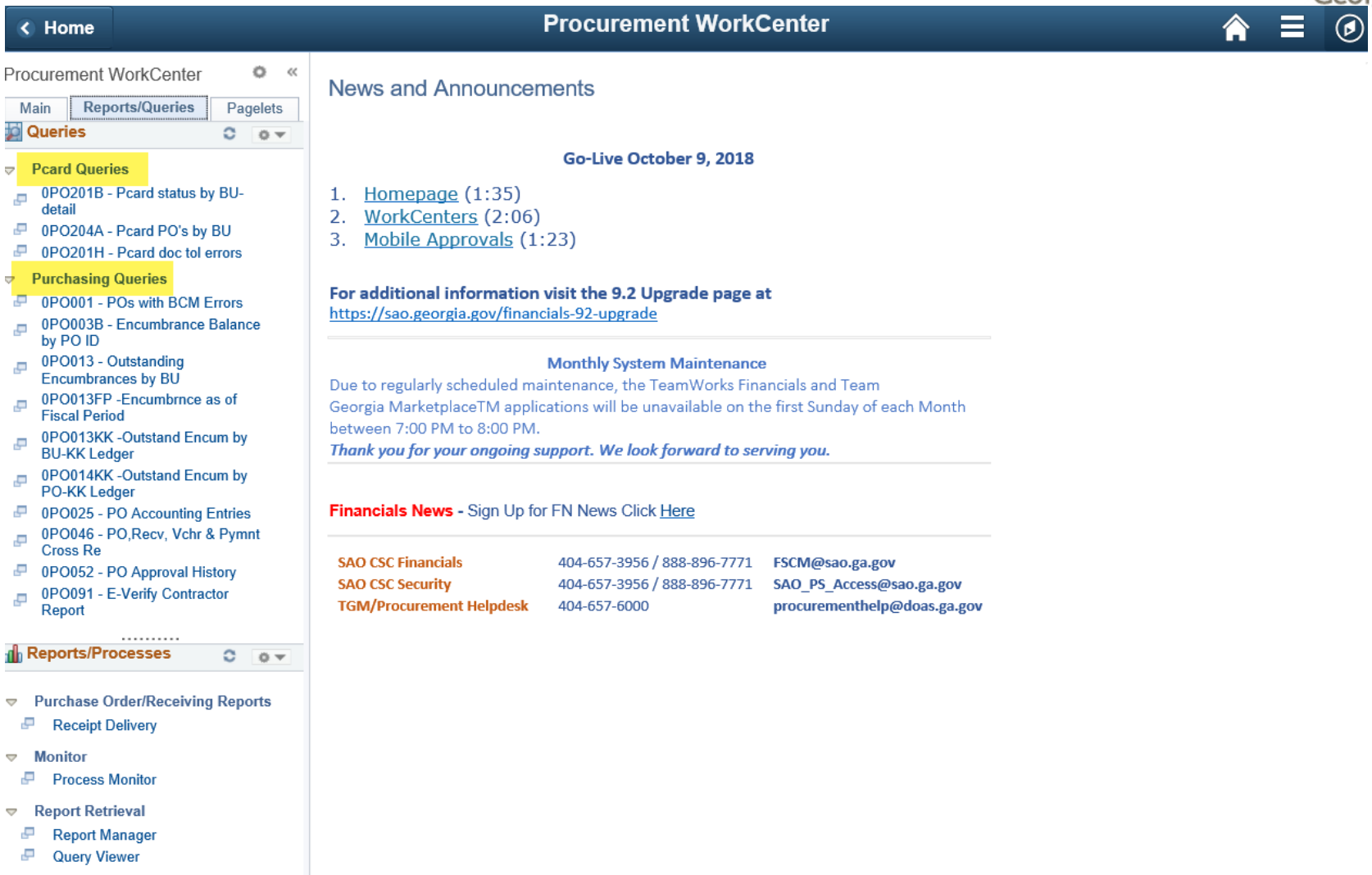
1. Main Tab: Links (Direct Menus related to user roles) and My Work (Pending Transactions)
2. Reports/Queries Tab: Common Queries by Module, Query Viewer, Process Monitor and Reports Manager
3. Pagelets Tab: PCard Staged Charges, PCard Verified Charges and PCard POs by User

- **My Work :** This section typically include links to pages where the user would need to take some type of action.
- **Links:** This section include additional links to pages or other areas of interest based on the user role.

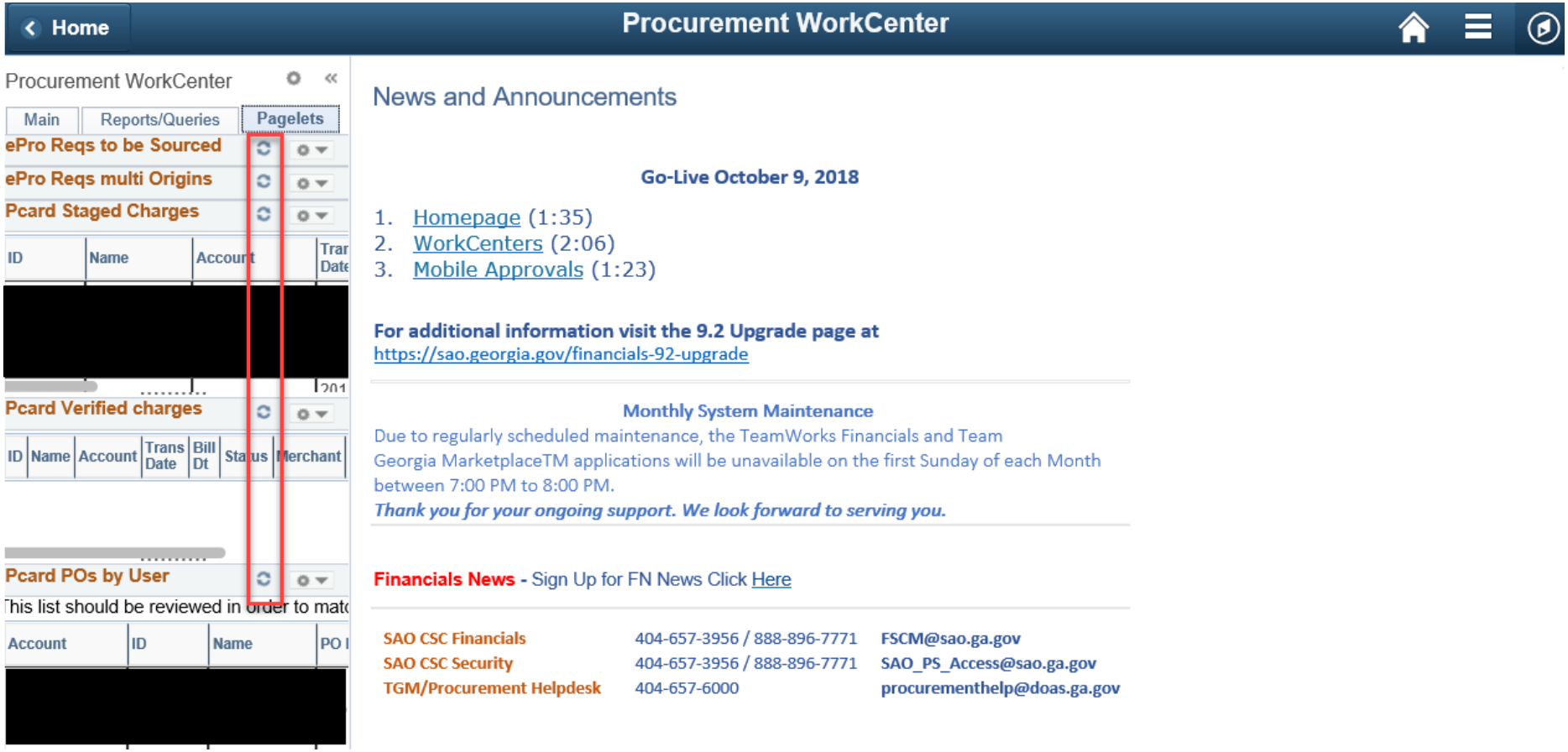
Procurement WorkCenter > Main



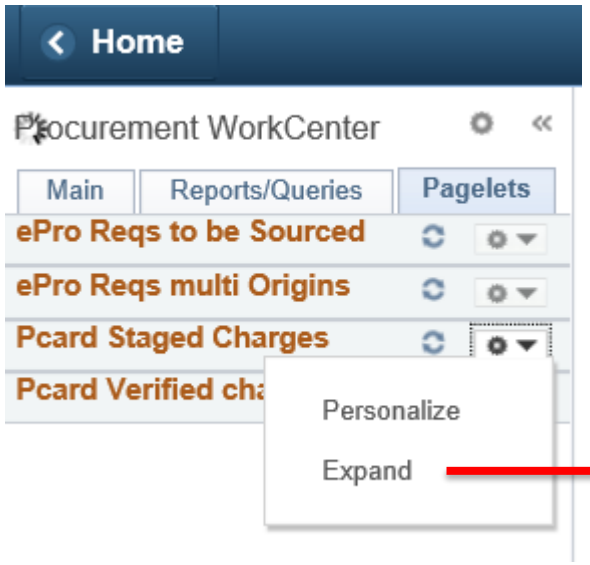
Procurement WorkCenter > Reports/Queries

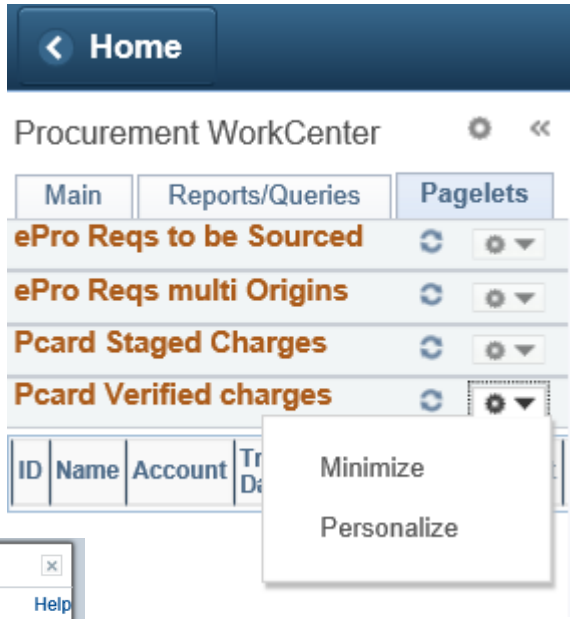


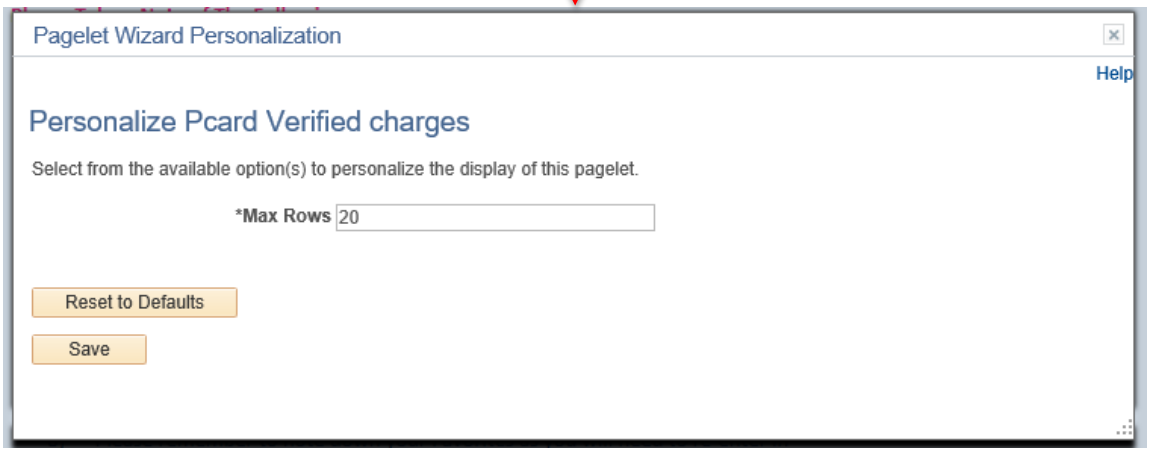
Procurement WorkCenter > Pagelets



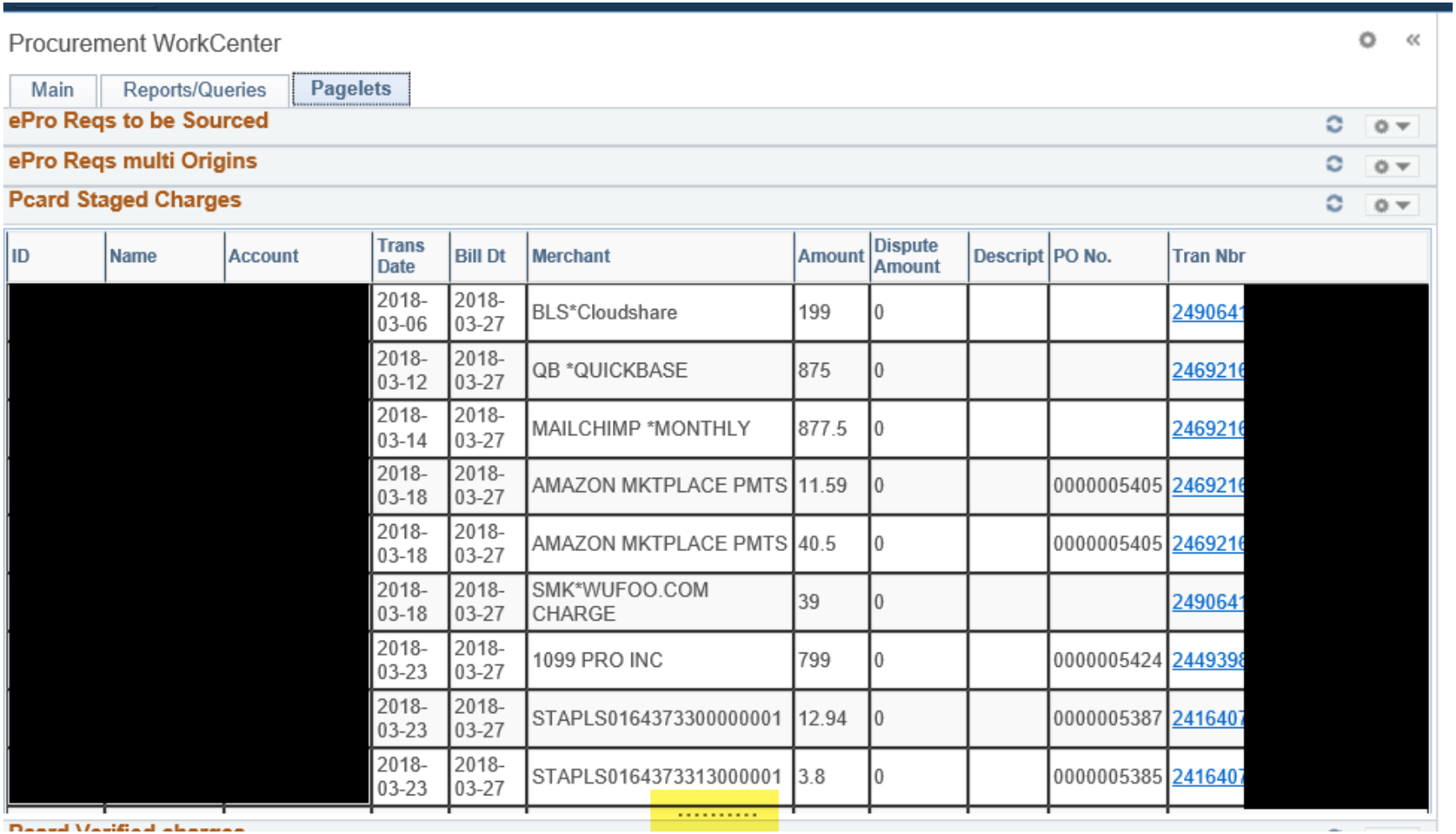
Pagelet – Minimize and Expand







Pcard Staged Charges - Pagelet



ID	Name	Account	Trans Date	Bill Dt	Merchant	Amount	Dispute Amount	Descript	PO No.	Tran Nbr
[redacted]			2018-03-06	2018-03-27	BLS*Cloudshare	199	0			2490641
			2018-03-12	2018-03-27	QB *QUICKBASE	875	0			2469216
			2018-03-14	2018-03-27	MAILCHIMP *MONTHLY	877.5	0			2469216
			2018-03-18	2018-03-27	AMAZON MKTPLACE PMTS	11.59	0		0000005405	2469216
			2018-03-18	2018-03-27	AMAZON MKTPLACE PMTS	40.5	0		0000005405	2469216
			2018-03-18	2018-03-27	SMK*WUFOO.COM CHARGE	39	0			2490641
			2018-03-23	2018-03-27	1099 PRO INC	799	0		0000005424	2449398
			2018-03-23	2018-03-27	STAPLS0164373300000001	12.94	0		0000005387	2416407
			2018-03-23	2018-03-27	STAPLS0164373313000001	3.8	0		0000005385	2416407

Pcard Verified Charges - Pagelet

Home

Procurement WorkCenter

Procurement WorkCenter

Main | Reports/Queries | Pagelets

ePro Reqs to be Sourced

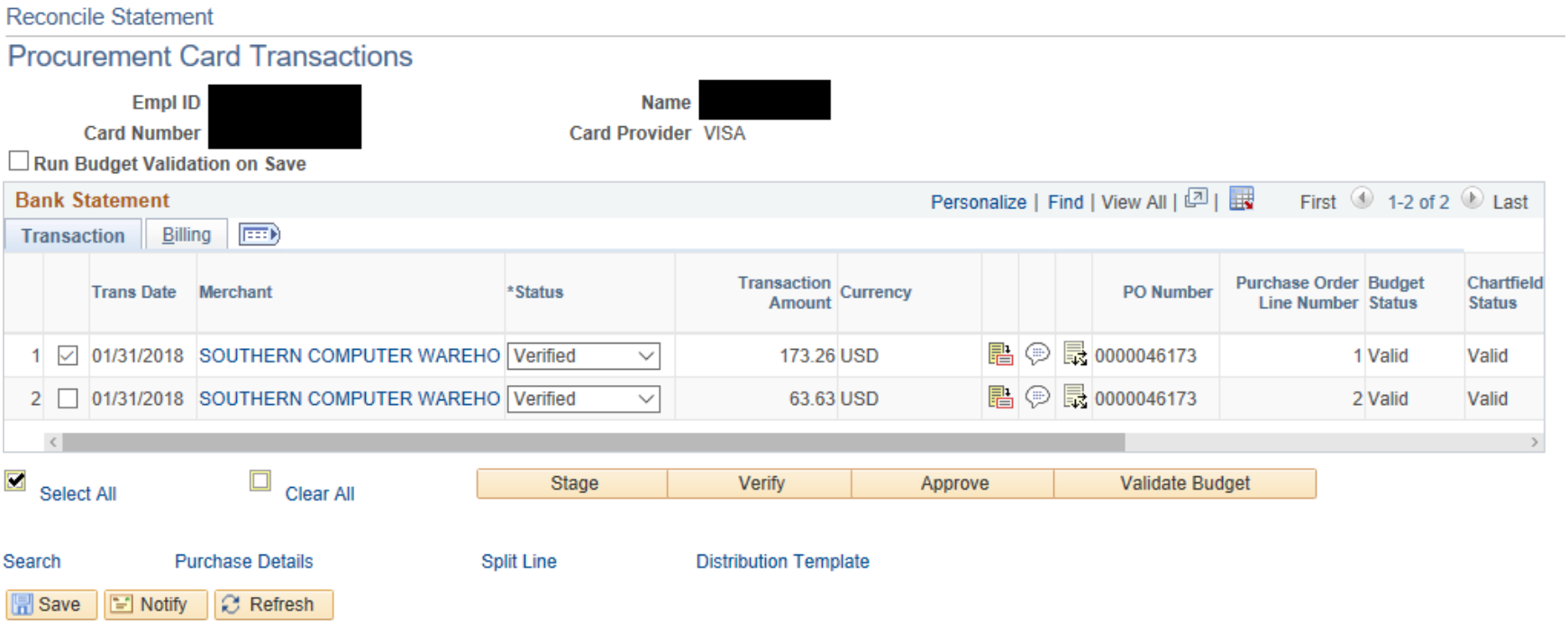
ePro Reqs multi Origins

Pcard Staged Charges

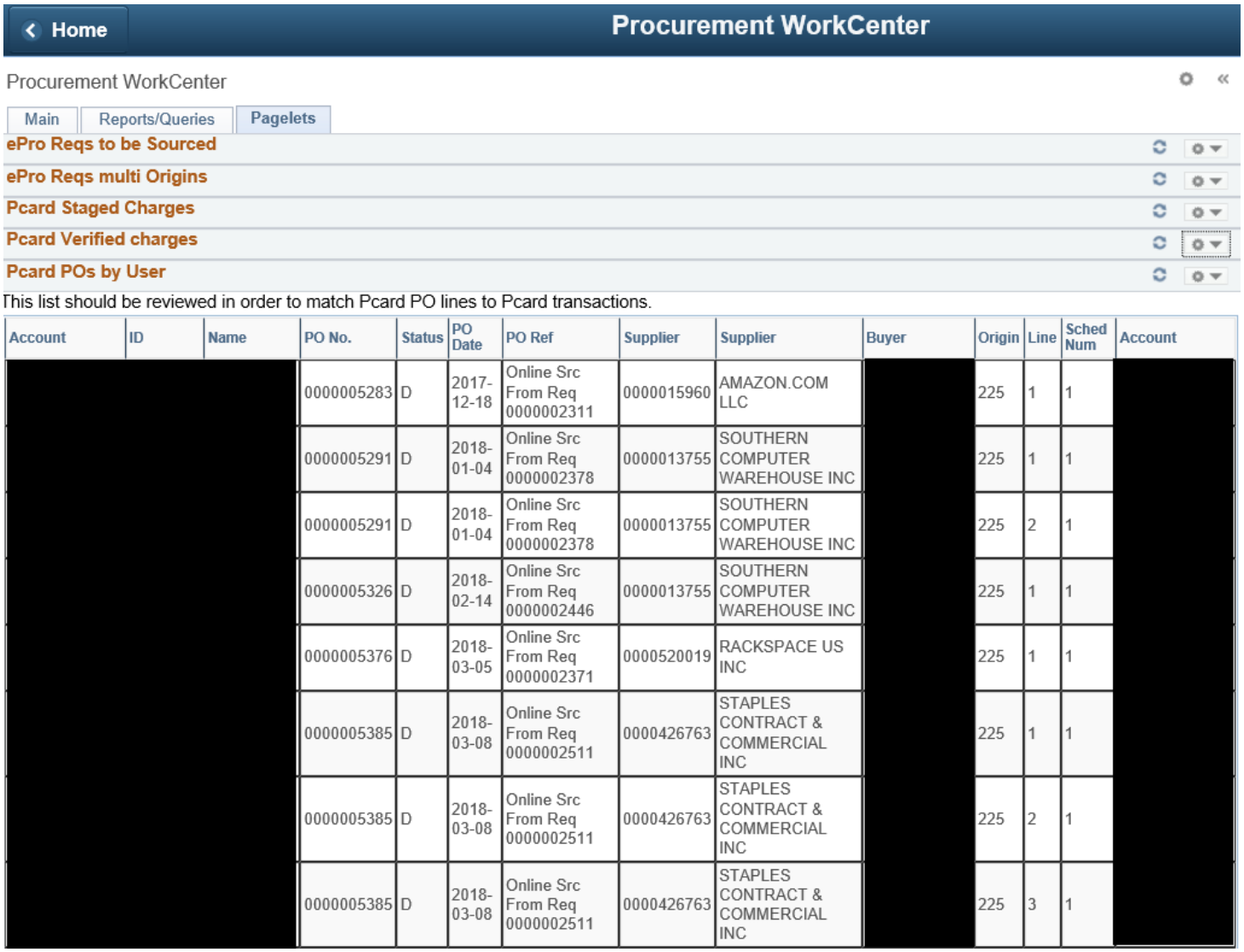
Pcard Verified charges

ID	Name	Account	Trans Date	Bill Dt	Status	Merchant	Sum Amount	Dispute Amount	PO No.	Tran Nbr
[redacted]			2018-02-05	2018-02-27	Verified	SQ *AEROFAX	960	0		2469216
			2018-02-10	2018-02-27	Verified	GSCCCA	57.8	0		2443106
			2018-01-30	2018-02-27	Verified	WW GRAINGER	137.93	0	0000046161	2475542
			2018-01-30	2018-02-27	Verified	SOUTHERN COMPUTER WAREHO	626.5	0	0000046163	2405449
			2018-01-31	2018-02-27	Verified	STAPLS0162971581000001	257.13	0	0000046172	2416407
			2018-01-31	2018-02-27	Verified	SOUTHERN COMPUTER WAREHO	236.89	0	0000046173	2405449
			2018-02-02	2018-02-27	Verified	SENDGRID	419.95	0	0000044640	2475542
			2018-02-02	2018-02-27	Verified	SENDGRID	2.76	0	0000046056	2475542
			2018-02-06	2018-02-27	Verified	AMAZON MKTPLACE PMTS	16.12	0	0000046210	2469216
			2018-02-07	2018-02-27	Verified	AMAZON MKTPLACE PMTS	15.09	0	0000046210	2469216

Transaction # hyperlink from Pagelet



Pcard POs by User - Pagelet



This list should be reviewed in order to match Pcard PO lines to Pcard transactions.

Account	ID	Name	PO No.	Status	PO Date	PO Ref	Supplier	Supplier	Buyer	Origin	Line	Sched Num	Account
[redacted]			0000005283	D	2017-12-18	Online Src From Req 0000002311	0000015960	AMAZON.COM LLC	[redacted]	225	1	1	[redacted]
			0000005291	D	2018-01-04	Online Src From Req 0000002378	0000013755	SOUTHERN COMPUTER WAREHOUSE INC		225	1	1	
			0000005291	D	2018-01-04	Online Src From Req 0000002378	0000013755	SOUTHERN COMPUTER WAREHOUSE INC		225	2	1	
			0000005326	D	2018-02-14	Online Src From Req 0000002446	0000013755	SOUTHERN COMPUTER WAREHOUSE INC		225	1	1	
			0000005376	D	2018-03-05	Online Src From Req 0000002371	0000520019	RACKSPACE US INC		225	1	1	
			0000005385	D	2018-03-08	Online Src From Req 0000002511	0000426763	STAPLES CONTRACT & COMMERCIAL INC		225	1	1	
			0000005385	D	2018-03-08	Online Src From Req 0000002511	0000426763	STAPLES CONTRACT & COMMERCIAL INC		225	2	1	
			0000005385	D	2018-03-08	Online Src From Req 0000002511	0000426763	STAPLES CONTRACT & COMMERCIAL INC		225	3	1	

P-Card User Procurement WorkCenter View

P-Card AP User Procurement WorkCenter View

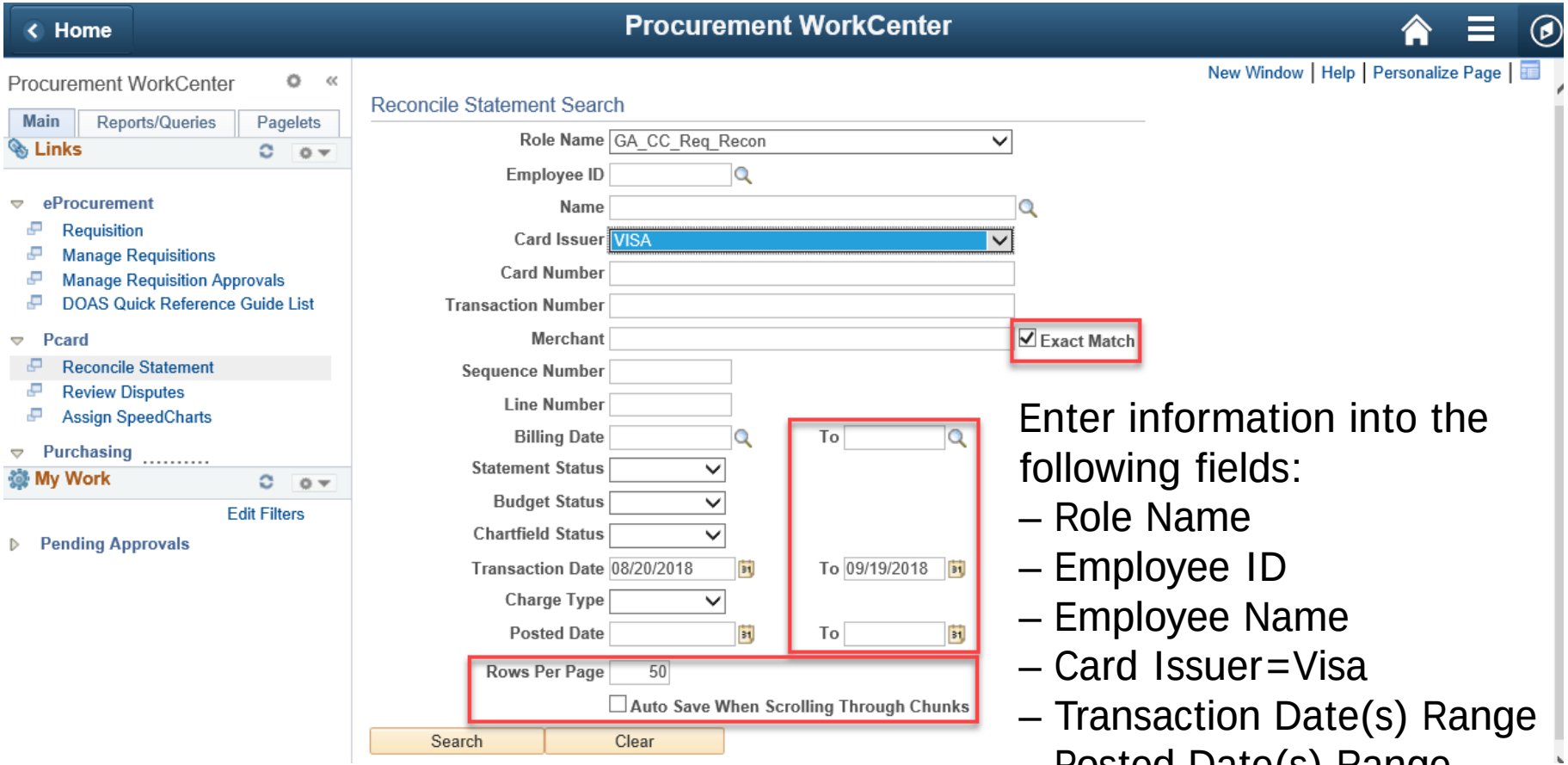
P-Card Agency Admin Procurement WorkCenter View

P-Card Agency Administrator and P-Card AP User Training

There is no change in P-Card Agency Administrator and P-Card AP User Training except for the navigation.

P-Card Agency Administrator and P-Card AP User related links will be directly available through Procurement WebCenter Main tab under Pcard section or through using NavBar: Navigator right hand side menu navigations.

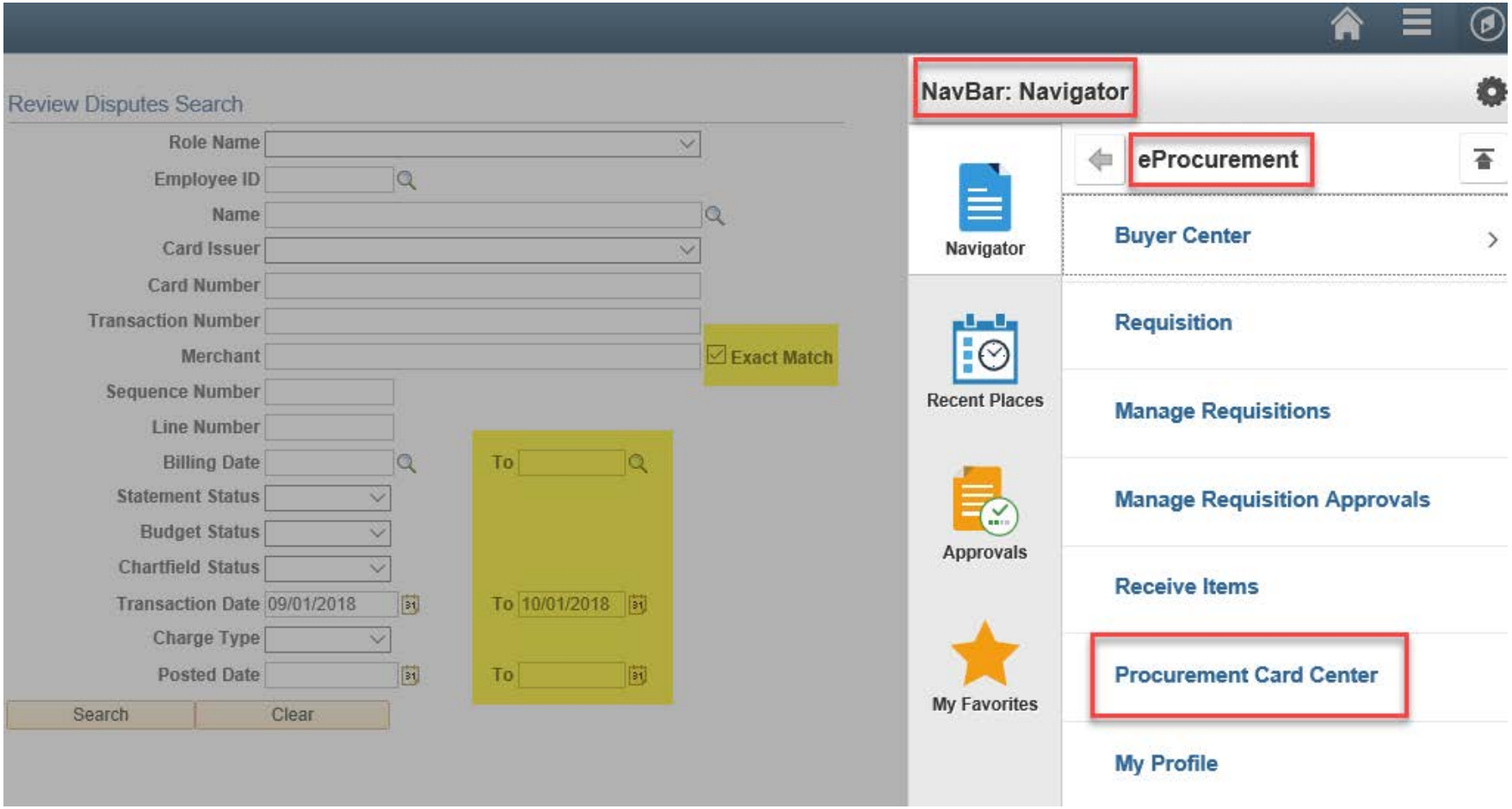
Searching for and Reconciling Transactions



Enter information into the following fields:

- Role Name
- Employee ID
- Employee Name
- Card Issuer=Visa
- Transaction Date(s) Range
- Posted Date(s) Range
- Billing Date(s) Range

Review Disputes Search



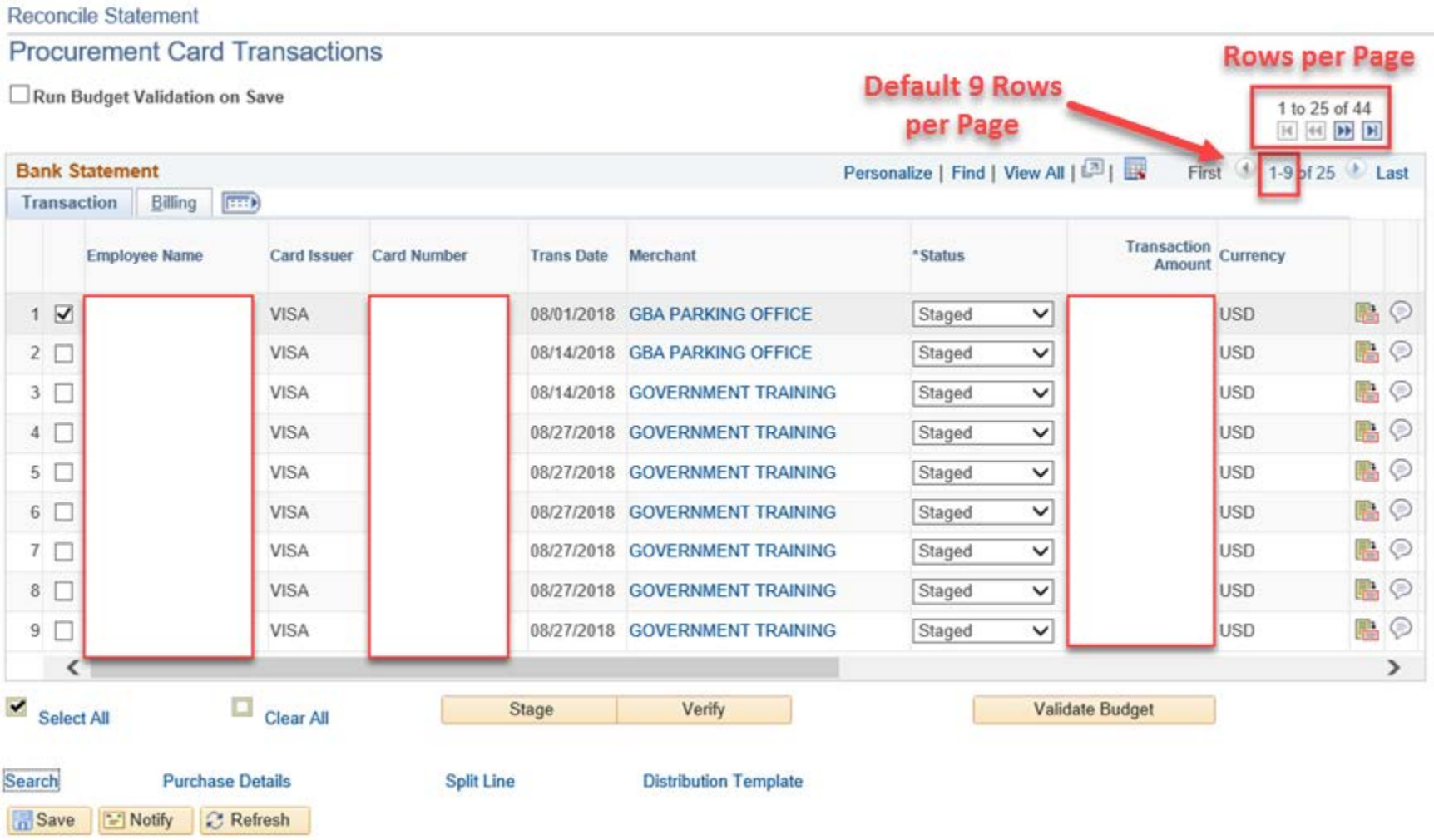
Searching for and Reconciling Transactions… Continued

Auto Save When Scrolling Through Chunks checkbox: When selected, any changes made to existing transaction lines will be automatically saved without a warning message when scrolling through chunks. Users can get through quick updates and proceed to the next chunk without having to click through a save warning message. When deselected, the user will receive a save warning message when scrolling if any of the current data has changed.

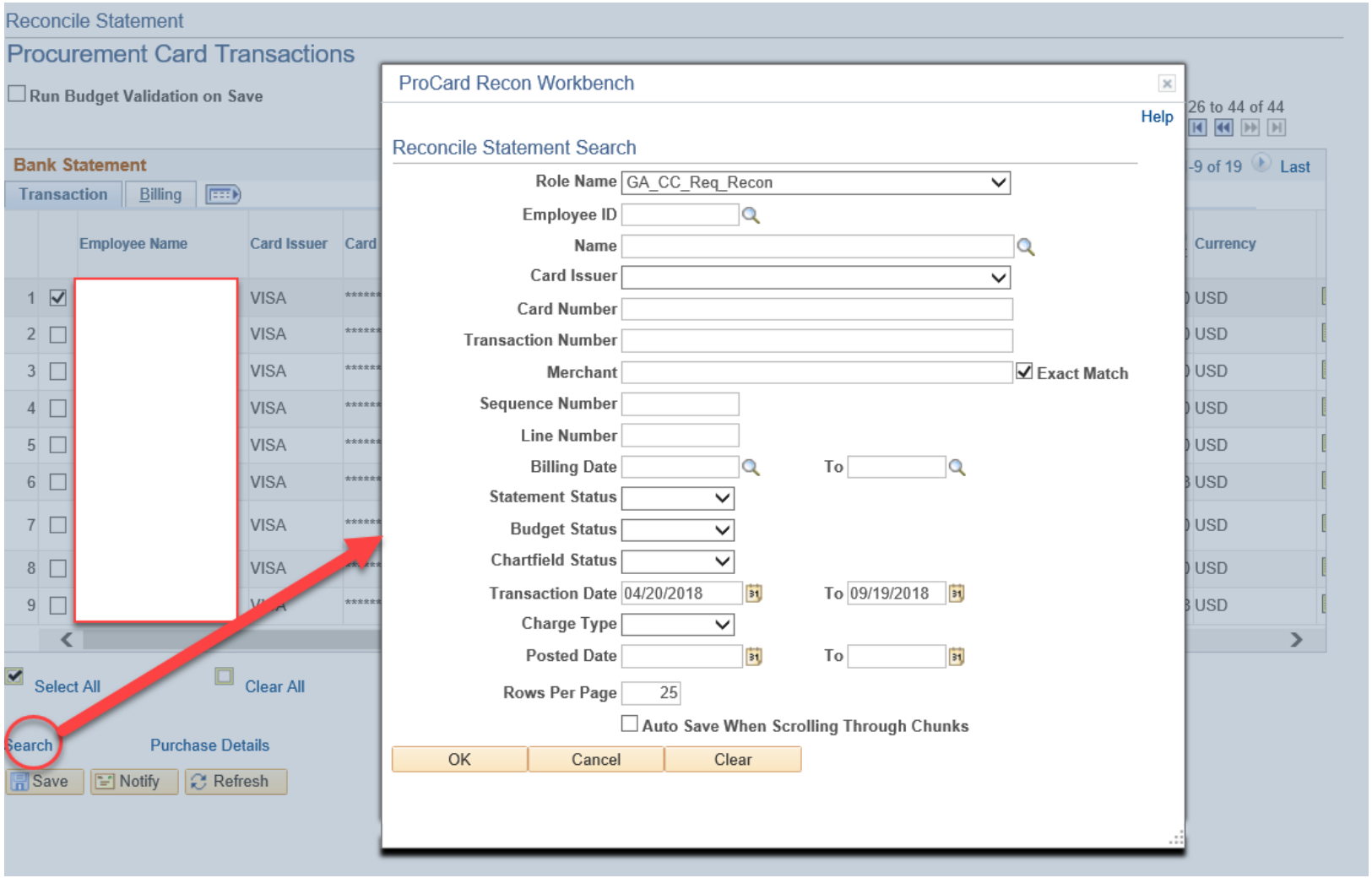
Rows Per Page: Search results will display 9 rows per page by default regardless of the maximum rows that is specified to be displayed. However, you can always select the view all option.

Merchant: Partial Merchant name can be used if the Exact Match checkbox is unchecked.

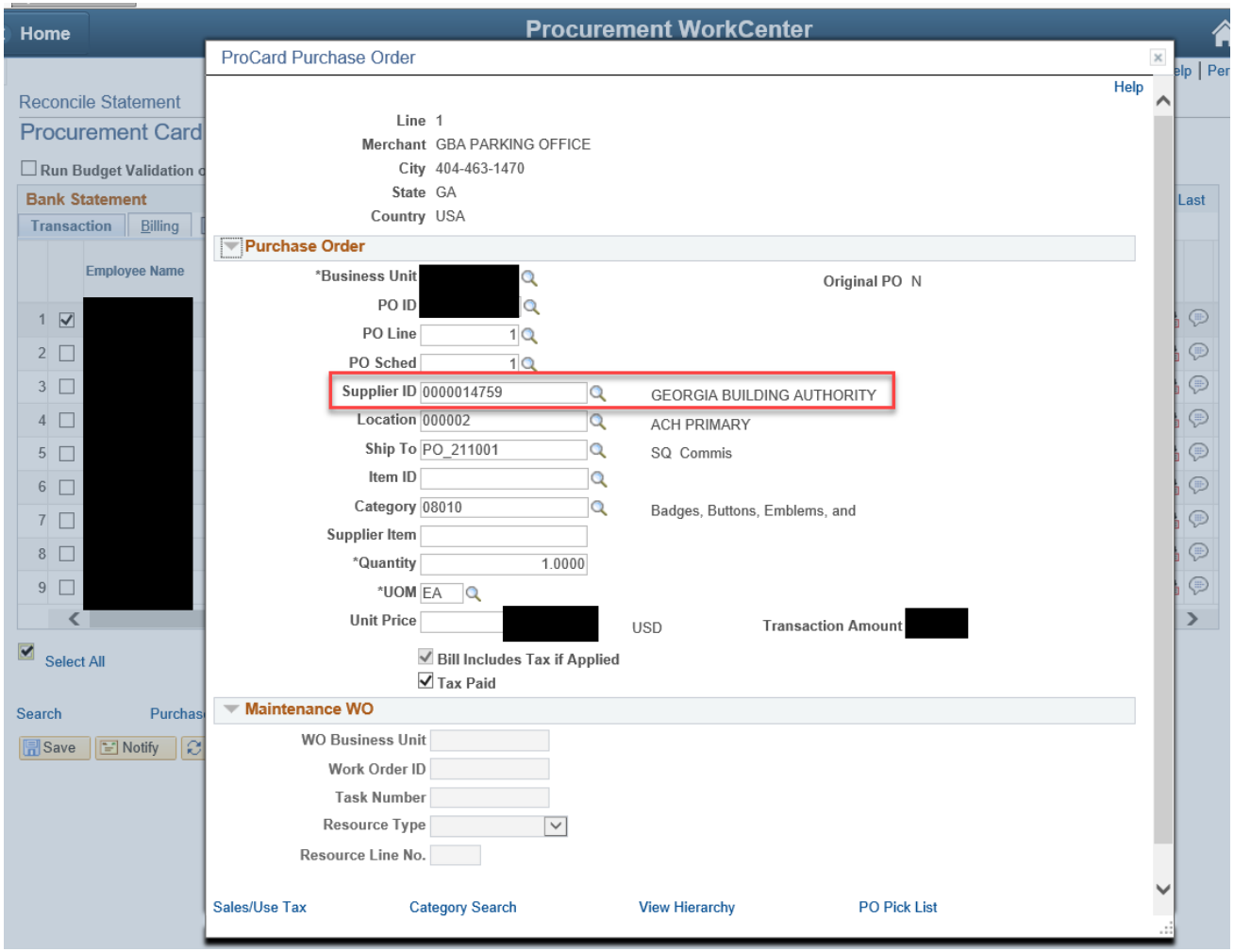
Procurement Card Transactions – Rows per Page



Refine Search (prompt-page)



Linking a Purchase Order



P-Card Comments and Attachments

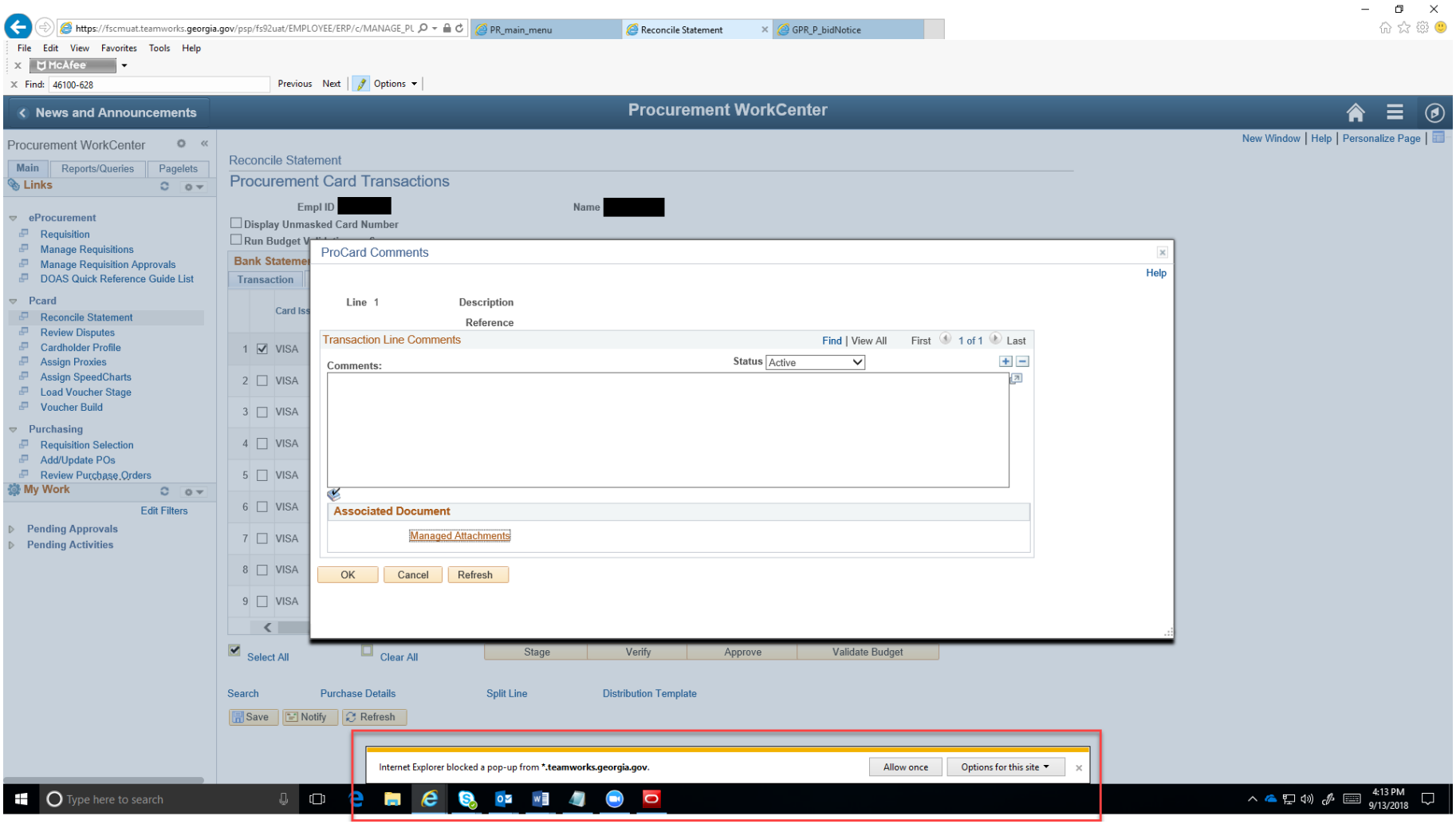
Pop-Up Blockers

PeopleSoft/TeamWorks Financials/TGM often uses pop-up windows to display information you are requesting. If your browser is set to block pop-up windows—and most are set that way as a default—then PeopleSoft will not work properly. If you click on a button or a link and nothing happens, you probably need to adjust your pop-up blocker settings.

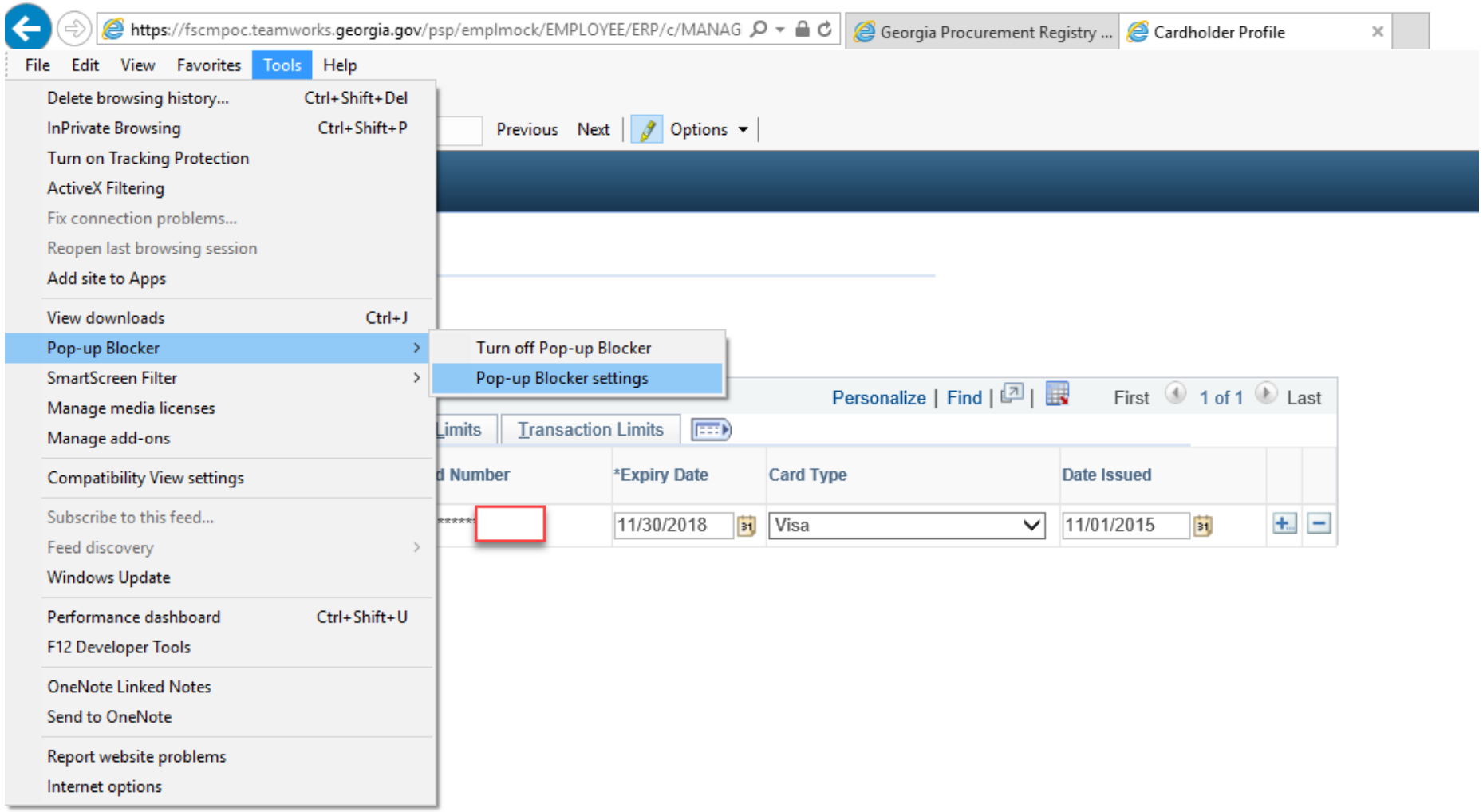
- Turn off pop-up blockers on websites that you have determined to be safe and valid for use at work.

- You can use an actual site name or partial site name as *.teamworks.georgia.gov, and add it into the allowed list by given browser.

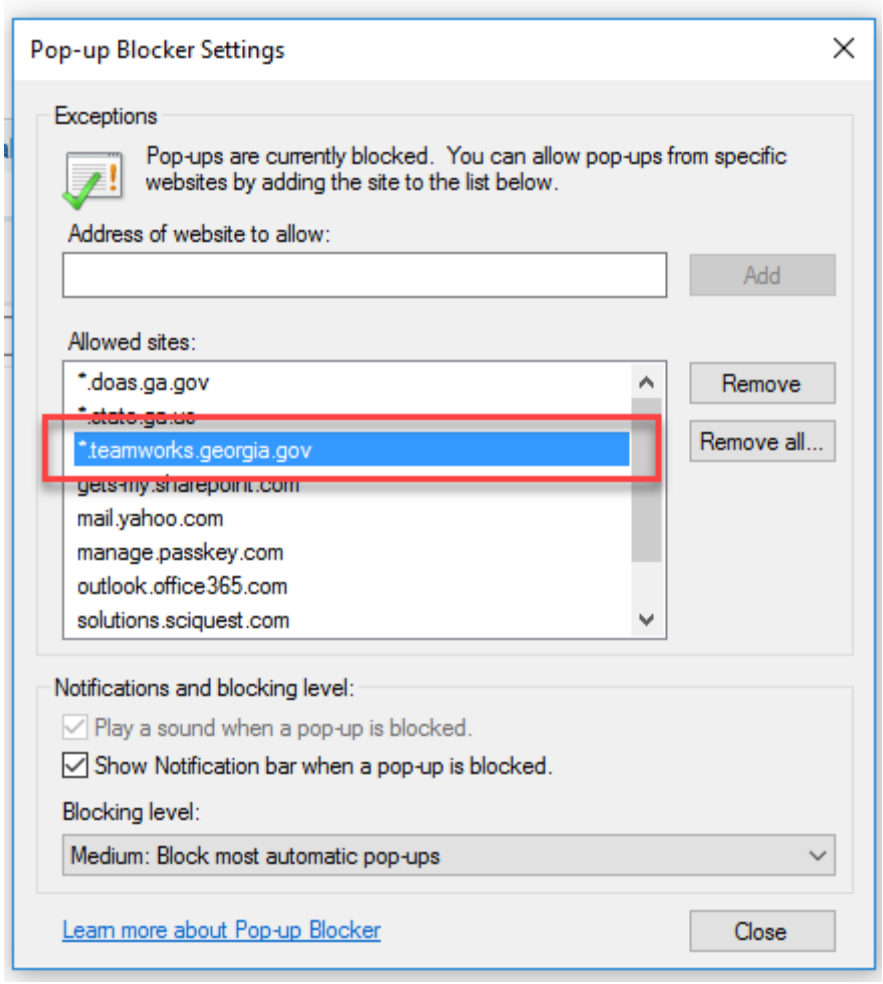
Internet Explorer 11: Pop-Up Blocker



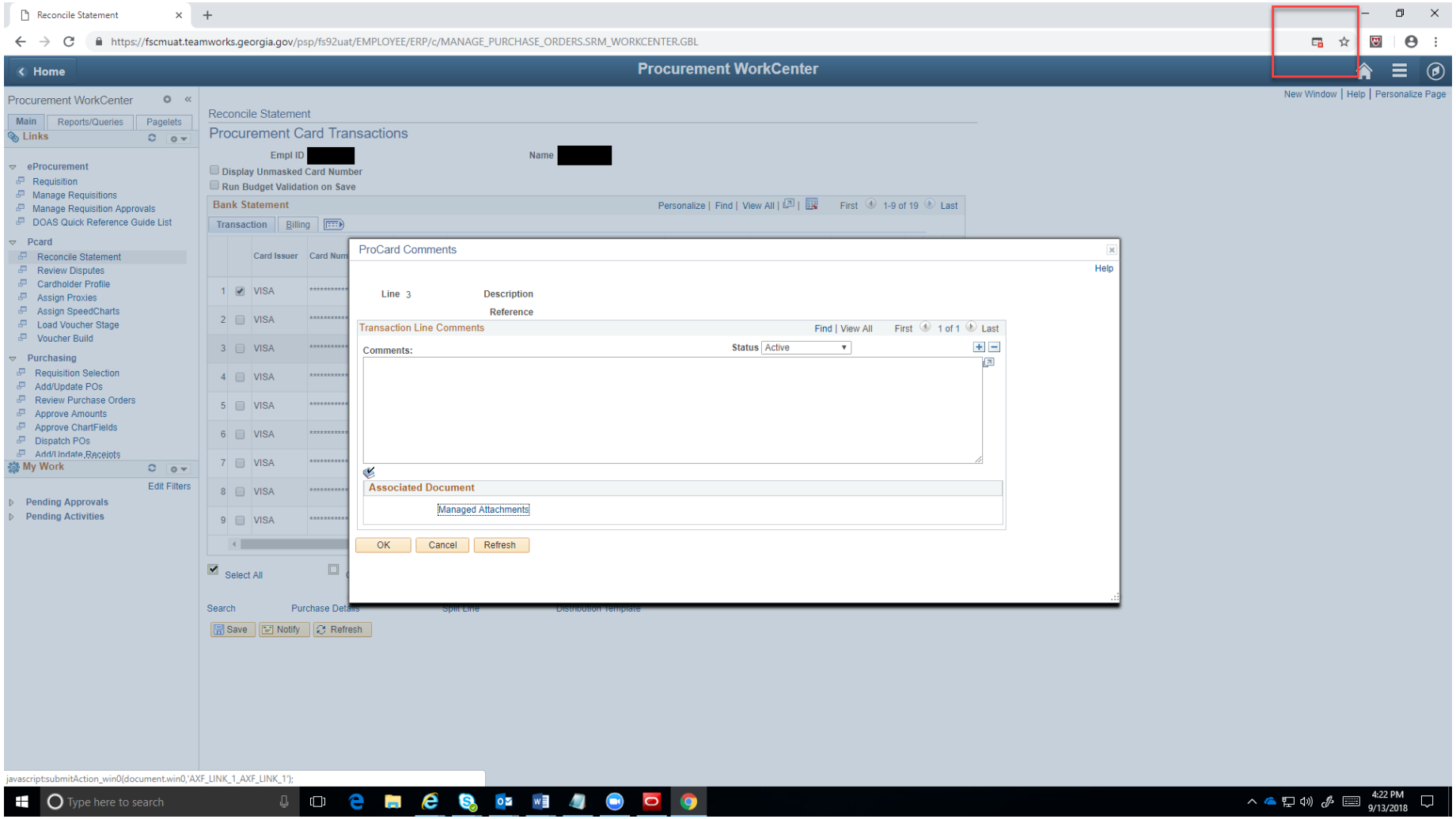
Internet Explorer 11: Pop-Up Blocker



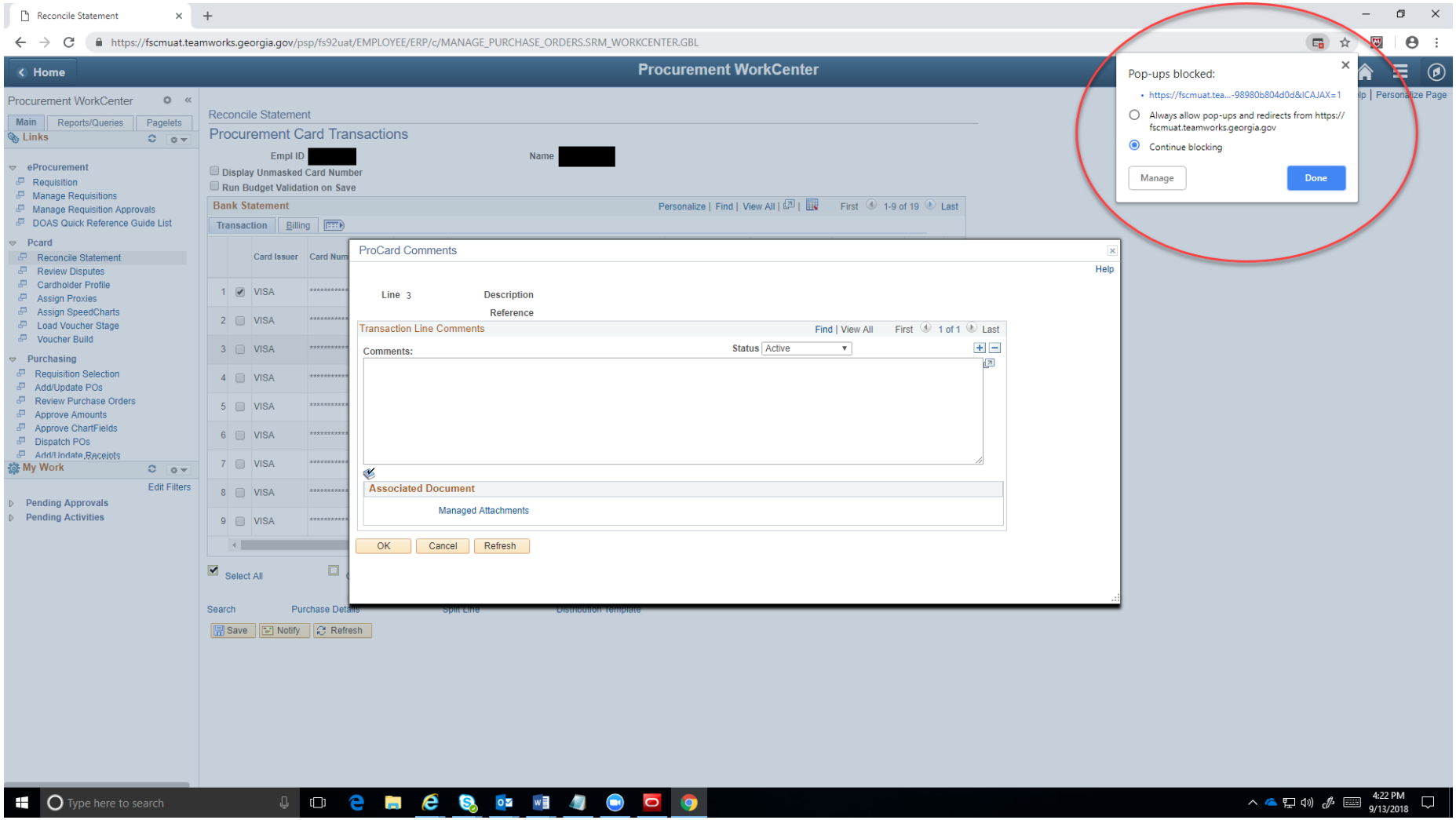
Internet Explorer 11: Pop-Up Blocker



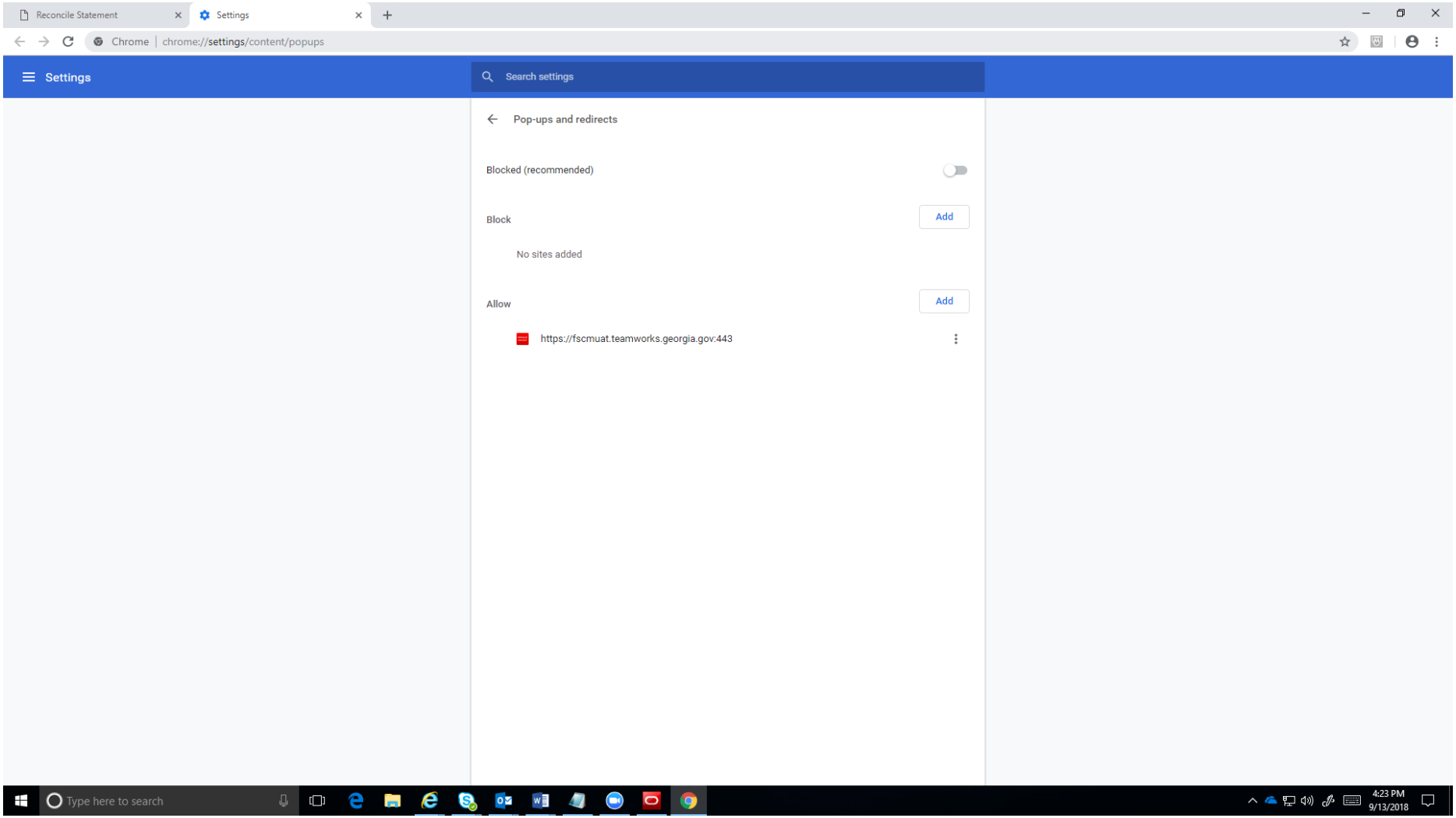
Google Chrome: Pop-Up Blocker



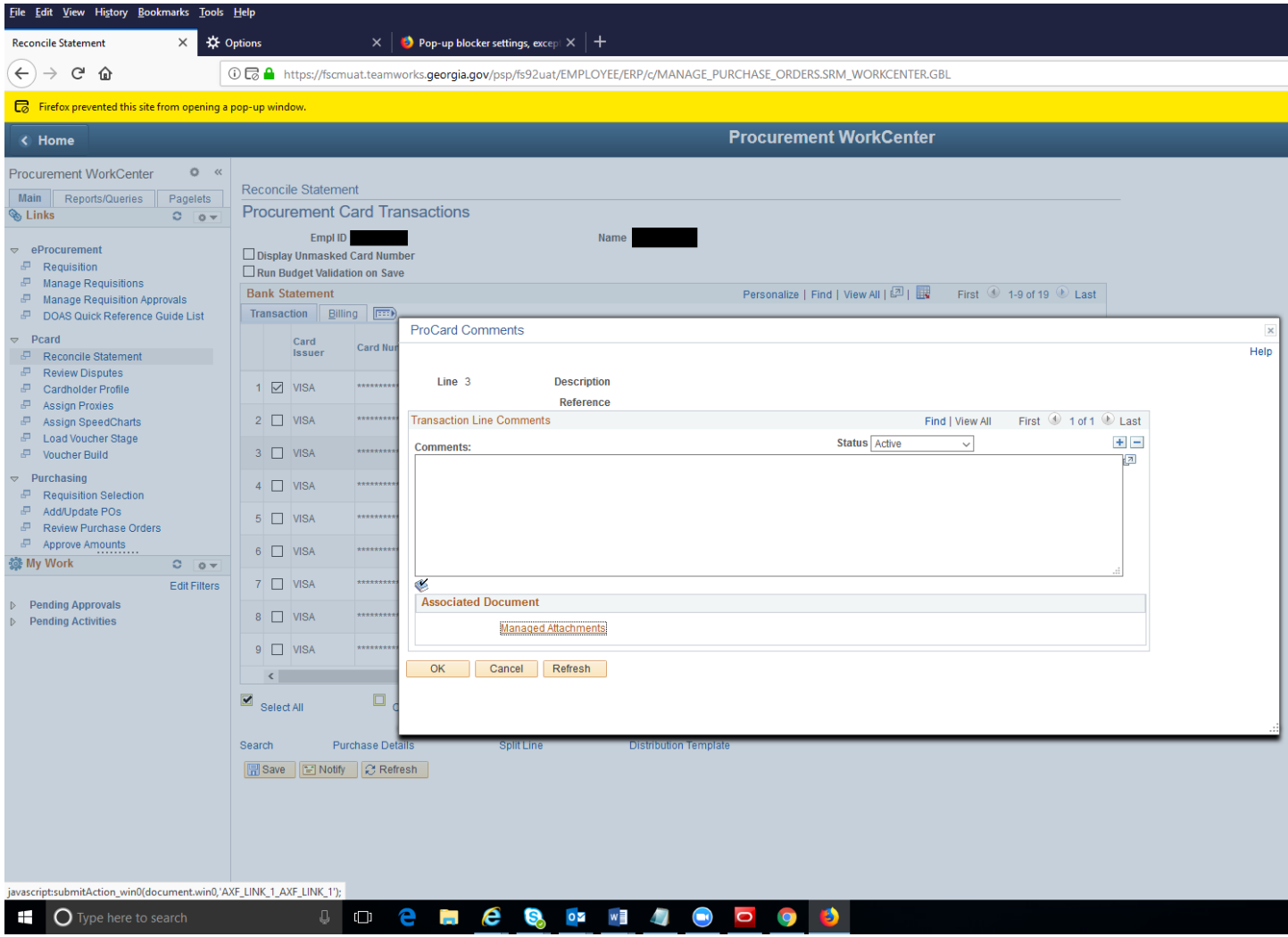
Google Chrome: Pop-Up Blocker



Google Chrome: Pop-Up Blocker



Firefox: Pop-Up Blocker



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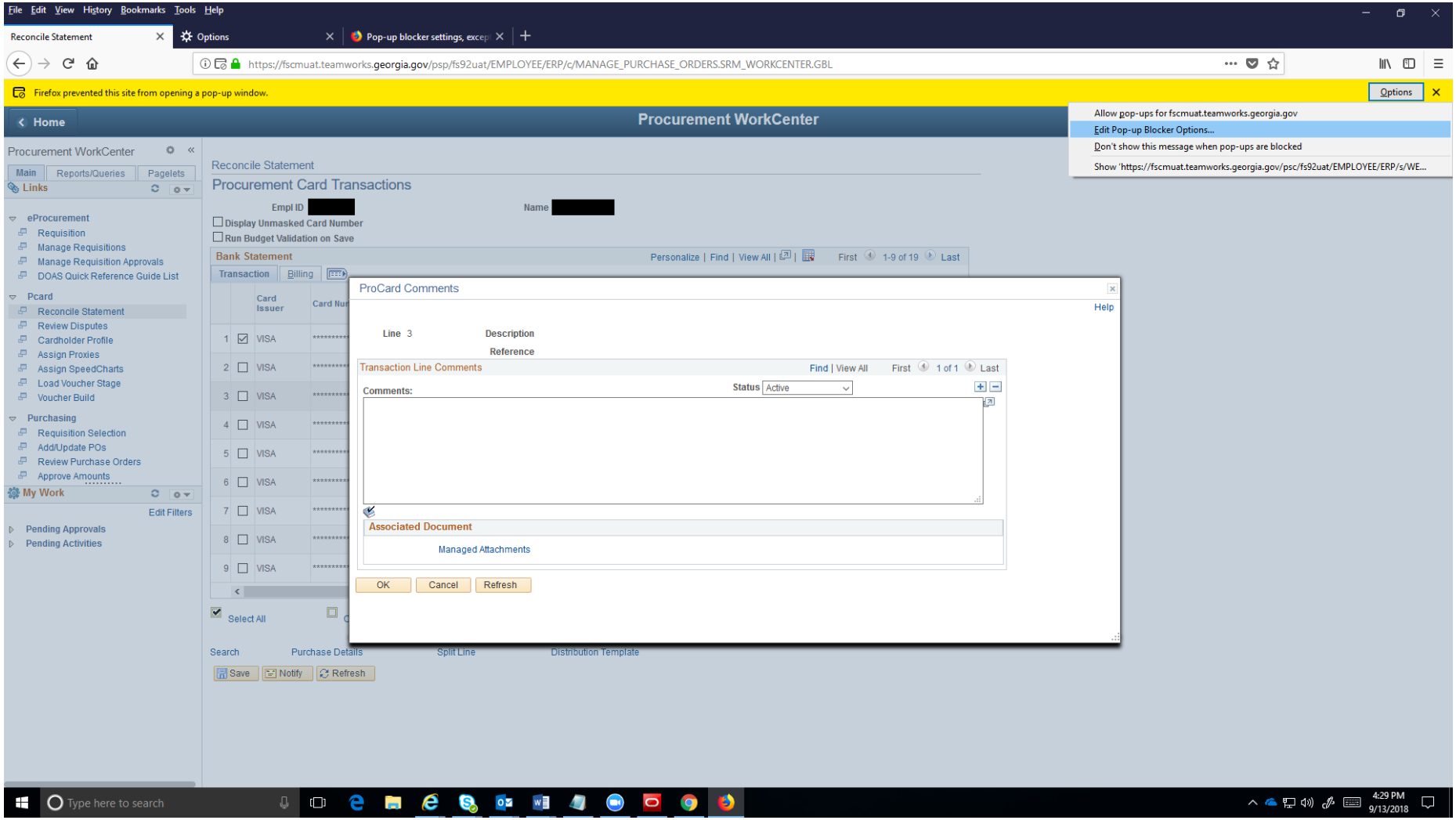
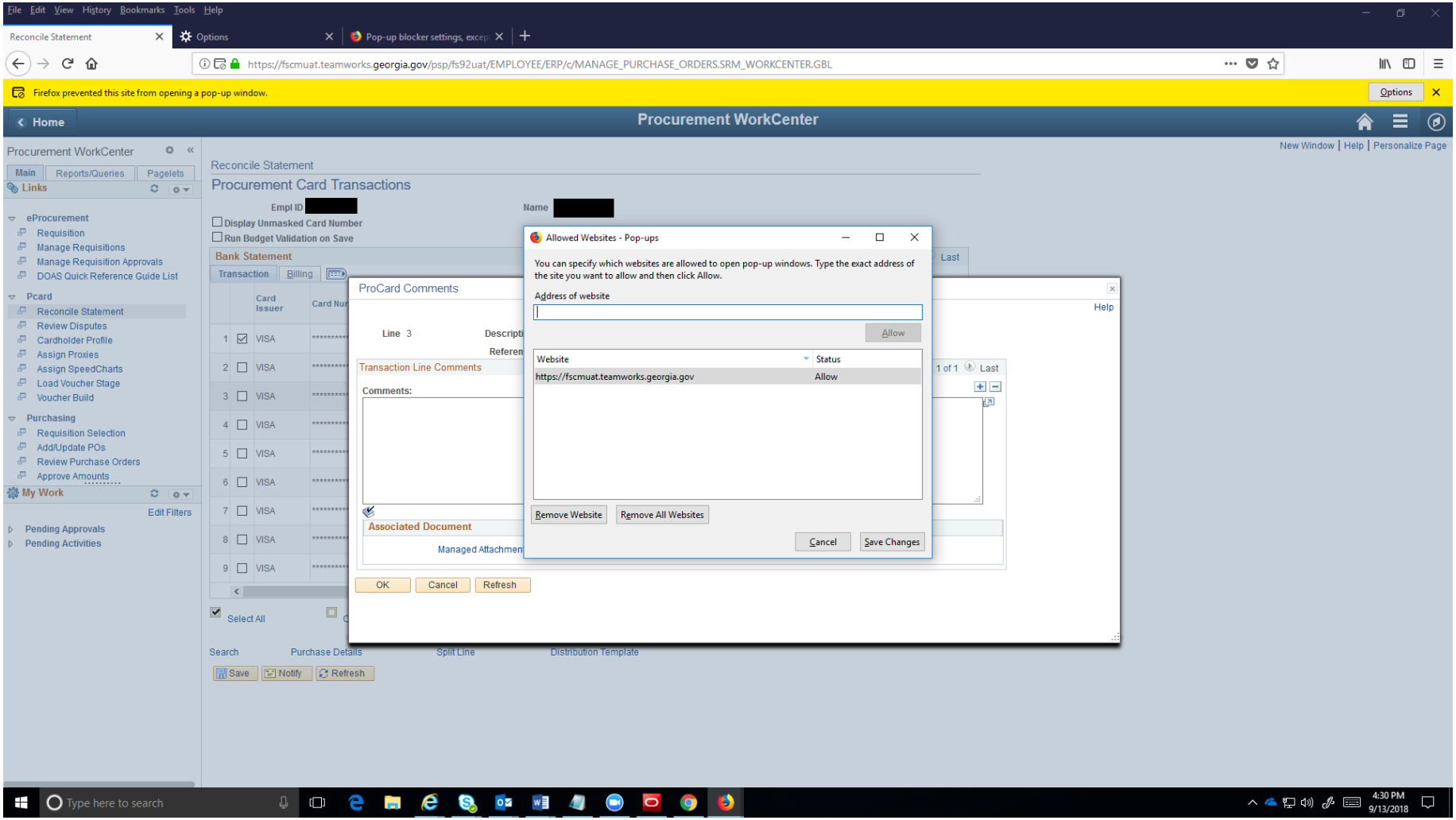
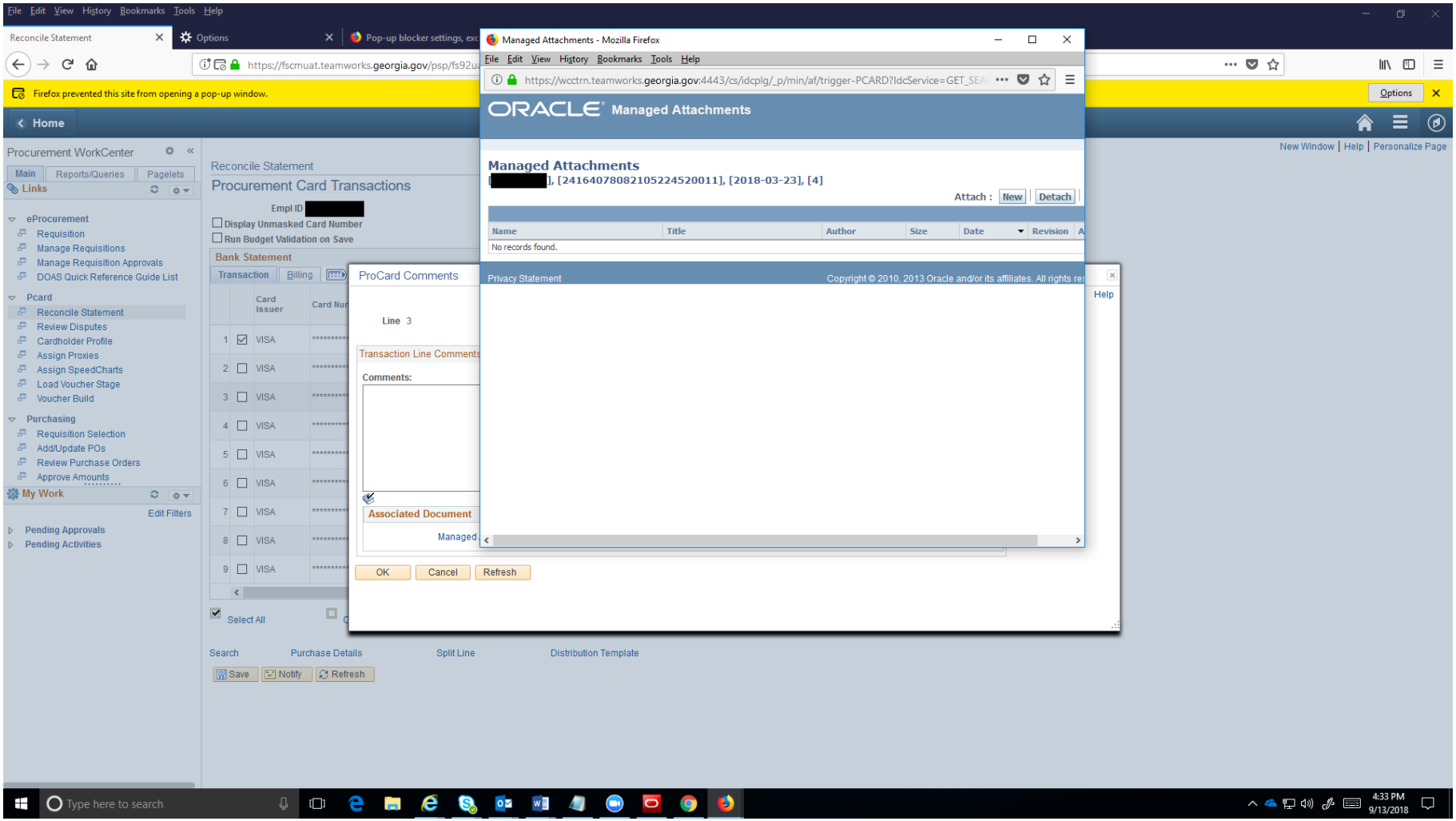


Firefox: Pop-Up Blocker



Firefox: Pop-Up Blocker



Additional Information:

SYSTEM DOWNTIME:
Thursday, October 4 at 3PM to
Tuesday, October 9th at 7AM

Transactions that occur during downtime will be loaded during the go-live weekend and will be available for reconciliation immediately after go-live.

For any reason(s), if you do not see your transaction(s) then please contact procurementhelp@doas.ga.gov with Card Holder Employee ID, Last 5 digits of Visa Card, Transaction #, Merchant, Transaction Date, Transaction Amount, and Purchase Order Number if exists along with your TeamWorks TGM User ID.

Upgrade Information Site(s):

- https://sao.georgia.gov/financials-92-upgrade
- http://doas.ga.gov/state-purchasing/team-georgia-marketplace/teamworks-financials-upgrade