

**From:** [Todd D. Walters](#)  
**Subject:** PCard News Flash - FY23-Q2  
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**Attachments:** [image002.png](#)

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Dear Colleagues:

First, I would like to take this opportunity to officially welcome our new eProcurement Analyst, Jenn Shipley, to the eProcurement Team. Before joining our team, Jenn worked for the Fay Jones School of Architecture and Design, and the Health, Human Performance and Recreations department, in the College of Education and Health Professions. Jenn has extensive knowledge of the University's PCard Program. We are very excited for her to join our team. Please feel free to reach out to her and introduce yourself.

Below is the FY23-Q2 News Flash. Please share this with anyone in your unit that you believe would benefit from the information. You can also email [pcard@uark.edu](mailto:pcard@uark.edu) to request someone to be added to the PCard Listserv.

Kindest regards,

Todd Walters  
eProcurement Manager



**PCard News:**

- **New Training Video: "How to Verify PCard Transactions"** – I have created a new training video and it is now on the Workday SharePoint Training Site. This video is intended for UAF PCard Cardholders. The video demonstrates how a cardholder should verify PCard transactions in Workday. It is short, to the point, and less than 5 minutes long. I encourage all current and new cardholders to watch this video. Here is a direct link to the training page with the video.

[https://uark.sharepoint.com/sites/wdt/SitePages/Requesting\\_and\\_Verifying\\_Credit\\_Cards.aspx](https://uark.sharepoint.com/sites/wdt/SitePages/Requesting_and_Verifying_Credit_Cards.aspx) It is the last video at the bottom of the page. Additional training videos are being planned

**Space Heaters** – With the weather getting colder, I have received questions regarding space heaters. Facilities Management and the Office of Environmental Health and Safety strongly discourage their use in all University buildings, and they are strictly prohibited from ALL University residence halls. If a department feels that a space heater is necessary for adequate warmth, this may indicate that the building heating system needs to be adjusted or repaired. Facilities Management should be notified through the Building Executive if the heating system is incapable of meeting comfort requirements. If the system is incapable of meeting comfort requirements, Facilities Management may recommend or provide additional sources of heating. Otherwise, a space heater would be a personal convenience item and not an allowable purchase on the PCard. You can read the full Space Heaters in University Facilities policy here. [https://enhs.uark.edu/\\_resources/documents/space-heater-usage.pdf](https://enhs.uark.edu/_resources/documents/space-heater-usage.pdf)

- **How can we help?** – Did you know that we have a team of people here to help you? If the eProcurement Manager is busy, please contact one of the other eProcurement Team Members listed below and they will be happy to assist you.
  - **Todd Walters: eProcurement Manager, [tdwalter@uark.edu](mailto:tdwalter@uark.edu) or 479-387-9229**
  - **Jenn Shipley: eProcurement Analyst, [jlgerman@uark.edu](mailto:jlgerman@uark.edu) or 479-575-5927**
  - **Ryan Shepard: eProcurement Project Analyst, [reshepar@uark.edu](mailto:reshepar@uark.edu) or 479-575-3882**
  - **Bobbie Kennedy: eProcurement Administrative Analyst, [bkenned@uark.edu](mailto:bkenned@uark.edu) or 479-575-6925**

#### **WORKDAY TIPS:**

- **Search Like a Pro** – The Workday search bar will try to guess what you are looking for. If you start typing in the name of a person, report, or task, pause to let Workday give you a drop-down with some options that may fit what you are looking for. You can also type in partial words or names (minimum of 3 letters) and hit “Enter” on your keyboard. If there is only one option with those letters, the form will pre-fill with that option for you. Otherwise, it will give you a list of all the options that contain those 3 letters. **As a reminder, you can only access reports and tasks correlated with your security role(s).**
- **Use Search Shortcuts** – Are you having trouble finding a task or report in Workday? Type a question mark in the Workday search bar and then press “Enter” on your keyboard. You will see a list of search shortcuts you can use to narrow down your search results.
- **Inbox Filters** – Do you find yourself shuffling through inbox items to locate PCard verifications needing your approval? You can create an inbox filter to show only PCard Transaction Verification Events. See the attached document “Inbox Filters” for instructions.
- **How to Tell if Your PCard Transactions Require Action** – There are 5 status that a PCard transaction may fall under in Workday:
  - **Approved** – The transaction has been correctly verified/reconciled by the cardholder and fully approved by the central eProcurement Office. No further action is required.
  - **In Progress** – The transaction has been verified by the cardholder and is awaiting final approval by the central eProcurement Office. The verification is not considered complete until the central eProcurement Office completes the approval.
  - **Draft** – The cardholder started a verification at one point but may have been missing information or forgot about it, so the verification autosaved as a draft. The cardholder needs to edit the verification in draft so it can continue along the approval process.
  - **Cancelled** – A verification may have been started at one point but had to be cancelled

due to validation errors preventing changes. If a user has to cancel a verification, they must start over.

- **New** – No action has been taken. The cardholder needs to begin a verification.

One of the most common questions received is how users locate transactions which are stuck in draft. For instructions on how to locate draft verifications, users can go to the Requesting and Verifying Credit Cards section on the Workday SharePoint Training site. This training resource also contains helpful videos and guides for other PCard related tasks.

[https://uark.sharepoint.com/sites/wdt/SitePages/Requesting\\_and\\_Verifying\\_Credit\\_Cards.aspx](https://uark.sharepoint.com/sites/wdt/SitePages/Requesting_and_Verifying_Credit_Cards.aspx)

#### REMINDERS:

- **Having a departmental holiday celebration soon?** – Remember you cannot use the PCard to pay for food, decorations, gifts or greeting/thank you cards for any departmental holiday celebrations.
- **PCard Billing Address vs. Shipping Address** – Please remember the PCard Billing address is always different than the shipping address. **Please make sure you are using your campus mailing address for the shipping address.** We have been receiving a lot of packages delivered to the billing address by accident. We do not have the space to accept packages that are sent to UPTW 101 by accident.
- **Returned PCard Verifications** – Please remember to attach all required documentation to your verification in Workday. The majority of PCard verifications are returned to the initiator due to missing documentation (e.g., *Itemized Receipt*, Membership Justification Form, License/Certification Justification Form, ITAM Approval, etc.), and not enough information regarding the purchase. Remember, users must now enter a clear explanation or justification into the Memo field explaining the need or use of the items purchased. Users can also utilize the Comments section to provide additional information, such as clarification for receipts with vague or departmental specific language, or to provide the approvers with any pertinent information. A few words can go long way.
- **Sponsorships** – All sponsorships, regardless of the amount, must be reviewed and approved by University Advancement. Remember to submit requests for event sponsorships to The Office of Donor Engagement at [engage@uark.edu](mailto:engage@uark.edu). Remember to attach a copy of the Donor Engagement approval to your PCard verification in Workday.
- **Fixed Asset Spend Category** – Remember to use the correct Spend Category. Attached is the Fixed Asset Spend Category Crosswalk document. This document will help with finding the correct Spend Category to use for asset tracking/inventory.

If you have any questions or need any assistance with the PCard & WEX program, do not hesitate to contact the eProcurement Office at [pcard@uark.edu](mailto:pcard@uark.edu).

# How to Create Inbox Filters

1. Type 'Create Inbox Filter' into the Workday search bar.
2. Name the filter in the **Description** field.
3. For the **Business Process Type**, select 'Procurement Card Transaction Verification Event'.
4. Click **OK**.

## Create Inbox Filter

Inbox Filter (empty)

Description \* PCard Transactions

Maximum Row Limit 200

### View Definition

\*  For all Business Processes

Business Process Type(s) × Procurement Card Transaction Verification Event

Task(s)

Conditions 0 items

+	And/Or	(	*Source External Field
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**OK** Cancel

# New Fixed Asset/Equipment Spend Categories Starting April 15, 2022

## What is changing for spend categories used to purchase assets?

Old spend categories will be marked as Do Not Use (DNU) and new categories will be available at 5 different levels depending on asset costs.

## Why are fixed asset/equipment spend categories changing in workday?

At the beginning of 2022 ProjectOne engaged with the campuses in working groups to improve configuration and remediate issues and streamline processes. The changes will improve grant billing and budgeting, asset reconciliations, and improve proper reporting of financial activity.

## What about assets already requisitioned?

The old categories will remain in place while existing purchases remain. Some point in the future change orders may be processed for open PO's once most request have been received and invoiced.

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## Which Level of Spend Category Should I use:

### Level 1 > \$5,000

Items purchase price + shipping + sales tax of individual items > \$5,000

Multiple items work together as a single unit or permantely combined colletive value >\$5,000

### Level 2 \$2,500 - \$4,999

Items purchase price + shipping + sales tax of individual items \$2,500 - \$4,999

Multiple items work together as a single unit or permantely combined colletive value \$2,500 - \$4,999

Fire arms below \$5,000 are Level 2 no matter the costs

### Level 3 \$500 - 2,499.99

These are items that are below 2,500 and consider high risk low value items\*

### Level 4 Low Value Collective

Individual items below \$500 that may be maintained as a single list. This is not often used.

### Level 5 Expensed Items non-trackable

Item from \$0 to \$2,499.99 that are not High Risk Equipment\*

### \*Low Value-High Risk Equipment

Assets valued from \$500 to \$2,499.99 that are easily susceptible to loss or theft, including, but not limited to, computers, monitors, laptop computers, tablets (e.g. iPad, Kindle Fire, etc.), guns, camera equipment, video equipment, video gaming equipment, printers, scanners, tools, cell phones, handheld radios, binoculars, are classified as Low Value-High Risk Equipment.

## Fixed Asset Spend Category Crosswalk

		LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5
<i>Equipment Level</i>		Equipment > = \$5,000	Equipment = Low Value (\$2,500 - 4,999.99)	Equipment = Low Value (\$500 - 2,499.99)	Equipment = Low Value Collective	Expensed Items/Non-Trackable
<i>Accounting Treatment</i>		Capital/Trackable	Expensed/Trackable	Expensed/Trackable	Expensed/Trackable	Expensed Items/Non-Trackable
<i>Grant Object Class</i>		09_Equipment	10_Materials and Supplies	10_Materials and Supplies	10_Materials and Supplies	
OLD SPEND CATEGORIES	NEW SPEND CATEGORIES					
zzzDNU SC0074	SCXXXX Data Processing Equipment	SC0541	SC0542	SC0543	SC0544	SC0062 Data Processing Supplies SC0082 Networking Supplies
zzzDNU SC0075	SCXXXX Equipment	SC0545	SC0546	SC0547	SC0548	SC0007 Other Supplies
zzzDNU SC0087	SCXXXX Technology Equipment	SC0549	SC0550	SC0551	SC0552	SC0007 Other Supplies
zzzDNU SC0092	SCXXXX Instructional Equipment	SC0553	SC0554	SC0555	SC0556	SC0011 Educational Materials
zzzDNU SC0093	SCXXXX Office Equipment	SC0557	SC0558	SC0559	SC0560	SC0085 Office Supplies
zzzDNU SC0094	SCXXXX Maintenance Equipment	SC0562	SC0563	SC0564	SC0565	SC0124 Shop & Industrial Supplies
zzzDNU SC0105	SCXXXX Computer Equipment & Major Accessories	SC0566	SC0567	SC0568	SC0569	SC0422 Minor Computer Accessories
zzzDNU SC0131	SCXXXX Medical Equipment	SC0570	SC0571	SC0572	SC0573	SC0130 Medical Supplies
zzzDNU SC0132	SCXXXX Furniture	SC0574	SC0575	SC0576	SC0577	SC0561 Minor Furniture
zzzDNU SC0133	SCXXXX Climatic Control Equipment	SC0578	SC0579	SC0580	SC0581	SC0007 Other Supplies
zzzDNU SC0134	SCXXXX Recreational Equipment	SC0582	SC0583	SC0584	SC0585	SC0007 Other Supplies
zzzDNU SC0135	SCXXXX Photographic Equipment	SC0586	SC0587	SC0588	SC0589	SC0122 Photographic Supplies
zzzDNU SC0137	SCXXXX Engineering & Drafting Equipment	SC0590	SC0591	SC0592	SC0593	SC0007 Other Supplies SC0124 Shop & Industrial Supplies
zzzDNU SC0138	SCXXXX Agricultural Equipment	SC0594	SC0595	SC0596	SC0597	SC0215 Agricultural Horticultural & Wildlife Supplies
zzzDNU SC0139	SCXXXX Industrial Equipment	SC0598	SC0599	SC0600	SC0601	SC0124 Shop & Industrial Supplies
zzzDNU SC0141	SCXXXX Research Equipment	SC0602	SC0603	SC0604	SC0605	SC0007 Other Supplies
zzzDNU SC0165	SCXXXX Lab Equipment	SC0607	SC0608	SC0609	SC0610	SC0123 Lab Supplies
zzzDNU SC0170	SCXXXX Communications Equipment	SC0611	SC0612	SC0613	SC0614	
zzzDNU SC0171	SCXXXX Firearms	SC0615	SC0616			<i>All Firearms must be tracked</i>
zzzDNU SC0179	SCXXXX Aircraft	SC0619				
zzzDNU SC0180	SCXXXX Security Equipment	SC0620	SC0621	SC0622	SC0623	SC0162 Security Supplies
zzzDNU SC0243	SCXXXX Farm Machinery and Equipment	SC0624	SC0625	SC0626	SC0627	SC0215 Agricultural Horticultural & Wildlife Supplies
zzzDNU SC0300	SCXXXX Boat	SC0628	SC0629	SC0630	SC0631	SC0007 Other Supplies
zzzDNU SC0301	SCXXXX Band and Musical Equipment	SC0632	SC0633	SC0634	SC0635	SC0011 Educational Materials
zzzDNU SC0302	SCXXXX Food Service and Concession Equipment	SC0636	SC0637	SC0638	SC0639	SC0126 Kitchen Supplies SC0176 Household Supplies
zzzDNU SC0303	SCXXXX Drama Equipment	SC0640	SC0641	SC0642	SC0643	SC0011 Educational Materials
zzzDNU SC0304	SCXXXX Buses	SC0644				
zzzDNU SC0095	SCXXXX Art	SC0645		SC0646		
zzzDNU SC0136	SCXXXX Museum Acquisitions	SC0647		SC0648		
zzzDNU SC0305	SCXXXX Athletic Equipment	SC0649	SC0650	SC0651	SC0652	SC0173 Athletics - Supplies
zzzDNU SC0140	SCXXXX Tools	SC0653	SC0654	SC0655	SC0656	SC0124 Shop & Industrial Supplies
zzzDNU SC0863	SCXXXX Fixed Equipment	SC0657	SC0658	SC0659	SC0660	SC0007 Other Supplies
zzzDNU SC0766	SCXXXX Janitorial Equipment	SC0661	SC0662	SC0663	SC0664	SC0091 Janitorial Supplies
zzzDNU SC0767	SCXXXX Lawn Equipment	SC0665	SC0666	SC0667	SC0668	SC0127 Grounds & Building Maintenance Supplies
zzzDNU SC0773	SCXXXX Materials Handling Equipment	SC0669	SC0670	SC0671	SC0672	SC0271 Material Handling Supplies
zzzDNU SC0044	SCXXXX Vehicles	SC0540				