Activating a Card

- Dial 800-393-3526
- Enter your 16-digit account number (Credit Card Number).
- When asked, enter the zip code 56601.
- When asked, enter the account phone number (your work number).
- When asked to enter the last 4 digits of your social security number, enter 9999 (we do not use your SSN).
- Your card will be activated, remove the sticker from the card.
- Sign your name on the back of the card.
- Place the tax exempt number on the back of your card.

AccessOnline Self-registration

- With your procurement card in front of you go to: <u>https://access.usbank.com</u> click on the "Register Online" link.
- When asked to enter your company short name, use MNSCU.
- Zip/Postal Code 56601
- Click on "Register this account".
- Phone and Fax number format: No dashes, hyphens, parenthesis or spaces.
- User ID must be 7 to 12 characters in length and can be alpha and or/ numeric.
- Passwords must be 8 to 20 characters in length, with at least one alpha and numeric character.
- User Verification is used to authenticate your account if you forget your User ID or Password.
- Click "Continue".
- If you get locked out from self-registration, you will need to contract Gina 2050, Dana 2044 or U.S. Bank Customer Service at 1-877-887-9260 to unlock your account.

Congratulations, you are now registered to enter AccessOnline.

Attach a Receipt to a Transaction

You can use this quick reference guide as a fast reminder of the basic steps for attaching a receipt to a transaction.



- 1. Select the **Transaction Management** high-level task.
- 2. Click the Transaction List link.

	3	At	tachment	<u>Comments</u>
		U		
		U		
		U	12	
LLARD		U		
		U		
CEA		U		
172		U		
071		U		
		U		
87		U		

3. On the list of transactions, click the **Paperclip** icon.



4. Click the Add Attachment link.

Add Attachment

ts • Sample Receipts for Upload	▼ *) Sei	arch Sample Receipts for U
-		= - 1
Jame 5	Date modified	Туре
🖀 Baja Sol July 1.jpg	7/1/2013 2:48 PM	JPEG image
🏃 BajaSol.pdf	7/15/2010 2:12 PM	Adobe Acrobat D
🔤 Home Depot.jpg	7/1/2013 2:48 PM	JPEG image
🏃 Marriott Sample.pdf	7/15/2010 2:12 PM	Adobe Acrobat D
🟃 Petrek.pdf	4/9/2012 10:25 AM	Adobe Acrobat D
	-	
: BajaSol.pdf		tom Files (*.jpeg;*.jpg;*.pg

- 5. Search and select one or more receipts to attach.
- 6. Click the Open button.



- 7. Page through multiple receipts, if needed.
- 8. Click the Save button.

Access Online Attach a Receipt to a Transaction: Version 1-2

	(, €+	Attachment <u>Comments</u>		
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LLARD		Ū		
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CEA		Ū		
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		-		

9. Click the PDF icon to open and view the attached receipt.

Learn More: For more detailed information, refer to the *Transaction Management* web-based training lesson and user guide.

How to add accounting codes

After you attached your receipt. Click on the word Pending of the transaction you are working on Click on the Allocations tab in the dialogue box. Fill in the cost center you want to use, Object Code and Fiscal Year. Click on Comment and add a brief description of the purchase or why you need it. When complete click on Save

An alternative way to add accounting codes.

At Card Account Summary with Transaction List

Click on the box under Select of the transaction you are working on. You can click on more than one transaction. This will allow you to enter cost centers to multiple purchases at one time.

Click on the Allocate box, this is near the bottom of the page.

Fill in the boxes for Cost Center, Object Code and Fiscal Year for each purchase.

Click Save Allocations

You will still have to click on "pending" to add a description in the comment section.

Once this is done you will have to approve the transaction. You will need to send it to your supervisor for approval. See the next page.

Approve a Transaction

You can use this quick reference guide as a fast reminder of the basic steps for approving a transaction.

1	Event Driven Notification Order Management Transaction Management Account Information Reporting My Personal Information	Welcome t(Your last login was 06/	
		Message Cente	
	Home	Message(s) from /	
	Contact Us	Message(s) from U	

1. Select the **Transaction Management** high-level task.

Role: Cardholder
Transaction List
View, review, allocate/reallocate and add comments
View Previous Cycle
Presents the Transaction list for the previous cyc
View Pending Transactions
Presents the pending transactions list.
View Unmatched Transactions
Presents the unmatched transactions list.

2. Click the Transaction List link.

Card Account Numb	per: *********569	91, DAMI	TA MARALD
Create Mana	ge] <u>» Trans</u>	List	
		,	
- Card Accoun	t Summary		
Account Number:		⊙ 5	691
Account Name:		DA	MITA MA
Billing Cycle Clo	ose Date: 07/	09/201	9 v s
-	L		
Total Transaction	IS:	\$9,	430.29
Reallocated Tran	sactions:	\$0.	00
% Reallocated Tr	ansactions:	0.0	%
Open Account			
Statement Anne	oval History		
Statement Appro	,		
Approval Statu	s Approval	Date	Approve
Approval Statu Approved	s Approval 06/20/201	Date 9	Approve ACPO04
Approval Statu Approved	s Approval 06/20/201	Date 9	Approve ACPO04
Approval Statu Approved	s Approval 06/20/201	Date 9	Approve ACPO04
Approval Statu Approved	s Approval 06/20/201 ria	Date 9	Approve ACPO04
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Approval Statu Approved	s Approval 06/20/201 ria 3 tus:	Date 9 Purcha	Approve ACPO04 ase ID: ed Transa

3. Specify search criteria.

4

4. Click the Search button.

Access Online Approve a Transaction: Version 1-2

heck All S	hown Un	check All Shown		_		
lect	Status	Approval Status	Match	<u>Trans</u> Date	Posting Date	Mercha
		Pending		06/28	06/28	ULINE
		Pending		06/25	06/27	МСМА
		Pending		06/25	06/26	STANL
		Pending		06/21	06/25	TIDEW
		Pending		<u>06/23</u>	06/25	E-ZPA
		Pending		06/20	06/22	WW G
		Pending		06/20	06/21	AMAZ
		Pending		<u>06/19</u>	06/20	SOL*S
		Pending		06/18	06/19	RED D
Reviewed Disputed Matched Exception Reallocated						

- 5. Select the transaction's check box.
- 6. Click the Approve button.



7. Click the Select Approver link, if needed.

	Search & Select an Approver						
	Enter the approver's full or partial name, or leave						
	Last Name: 8 First Name:						
9	mason						
	Search						
	Please select an approver from the results list be						
	Records 1 - 1 of 1						
	Select Approver Name Email Address						
1	0 MASON, ART ART.MASON@ACC						
	Records 1 - 1 of 1						
1	Set selection as your default approver						
12	Select Approver						

- **8.** Type a last name and/or a first name.
- 9. Click the Search button.
- **10.** Select the radio button for the correct approver.
- **11.** Select to make this person your default approver, if desired.
- 12. Click the Select Approver button.



13. Click the Submit button.

[-] Transaction List					
Records 1 - 9 of 9					
Check All Shown Uncheck All Shown					
Select	Status	Approval Status	Match	Tran	
	® (D)		60 🔺	Date	
►□		Approved		<u>06/2</u> 8	
		Penning		<u>06/2</u> 5	
		Pending		<u>06/2</u> 5	
				<u>06/2</u> 1	
Ν	Note the Approved status.				
		Penaing		06/20	
		Pending		06/20	

Learn More: For more detailed information, refer to the *Transaction Approval Process* web-based training lesson and user guide.