PCard Guidance

PCard Sign Off Deadlines (Works)
Electronic Signatures on PCard Forms & ODU Reconciliation Report

How can PCard reports and forms be signed when cardholders and approvers are not in the same location? Signatures on the ODU Reconciliation Reports and other PCard forms may be done electronically using the Adobe Fill & Sign feature. (You may need to download the pdf and open in Adobe to access the fill & sign feature.)

The Fill & Sign option is available in the right side menu of the pdf document. Scroll down if necessary to get to the option. For additional assistance with setting up a digital signature, please contact your ITS technical support person or the ITS Help Desk at itshelp@odu.edu or 683-3192.
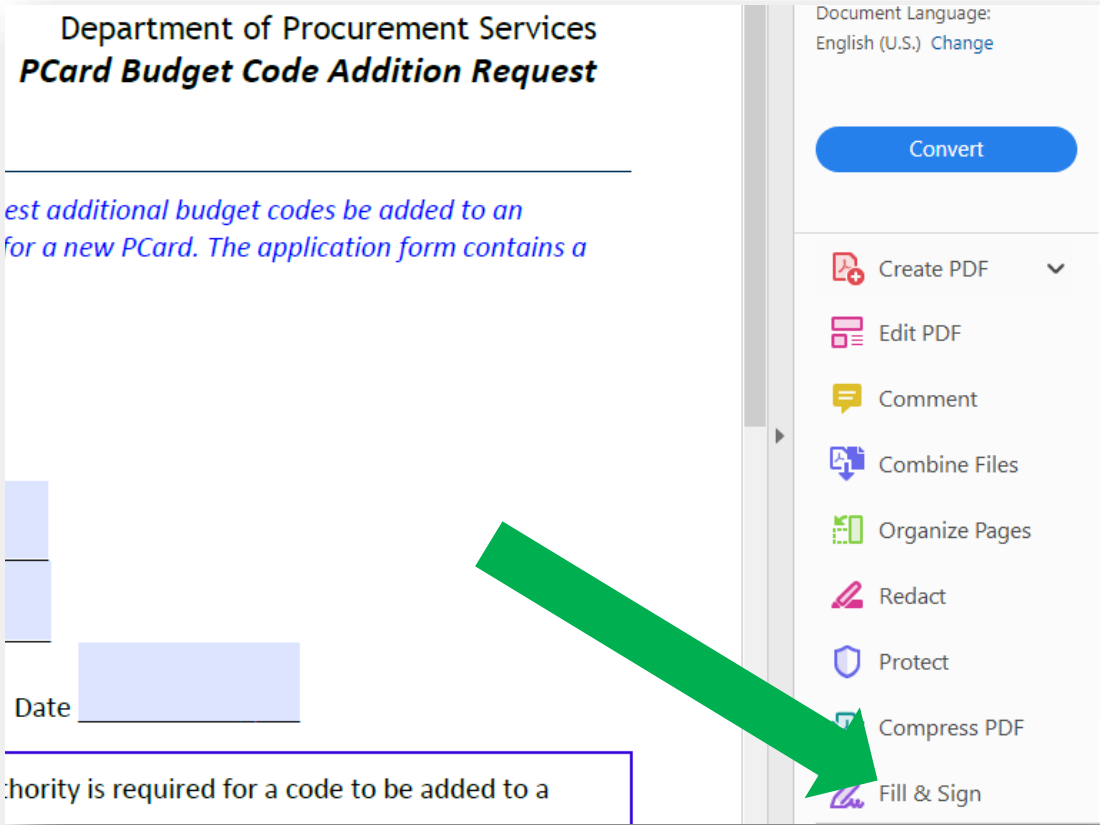
Receipt -Uploads

Will receipts and supporting documentation still need to be uploaded into Works while employees are working remotely? Yes.

Yes; receipt uploads may be done in the same manner remotely as they are on campus. File types supported for receipt upload: pdf, png, jpg, gif and jpeg. Receipts should be saved to the computer before logging into Works. Note: Receipts cannot be attached after both cardholder and approver have signed off.

To attach documentation to a transaction, go to the Works homepage.

- Click the "Pending" link in the Action Items box to bring up current transactions.
- Click the "Document" number on the left side.
- Click "Manage Receipts."
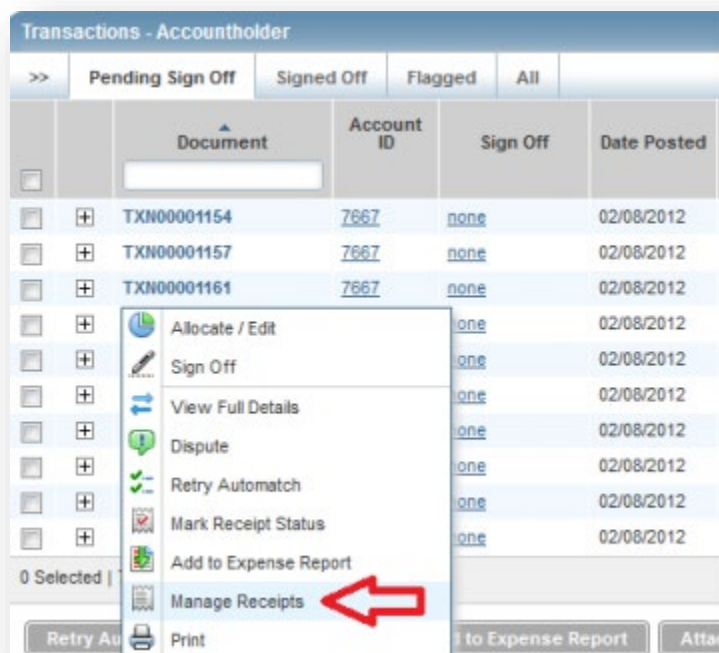
- Click "Add" and select "New Receipt."
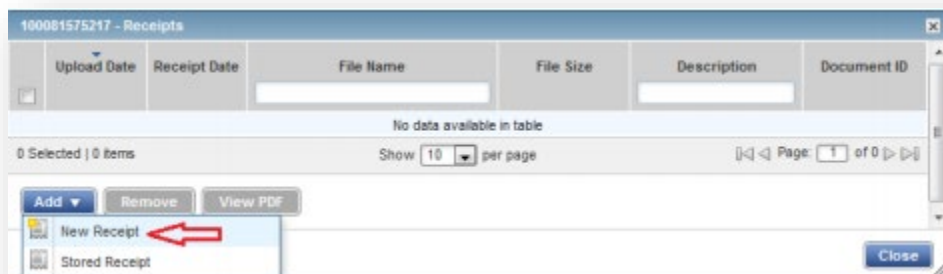
- Browse to choose file. Fill in receipt date and a description if desired. Click OK.

- The receipt information will appear, and additional supporting documents may be added to the transaction. Up to 20 documents (pdf, png, jpg, gif or jpeg) under 1MB may be attached to a single transaction. When finished, click "Close."

- Uploaded Receipt column will update to read "Yes."

- Receipts are now attached to transaction and ready to sign off.

Reducing PDF Document File Size

Works receipt imaging has a 1MB limit for individual pdf uploads. (Steps for determining file size included at the end of this section.)
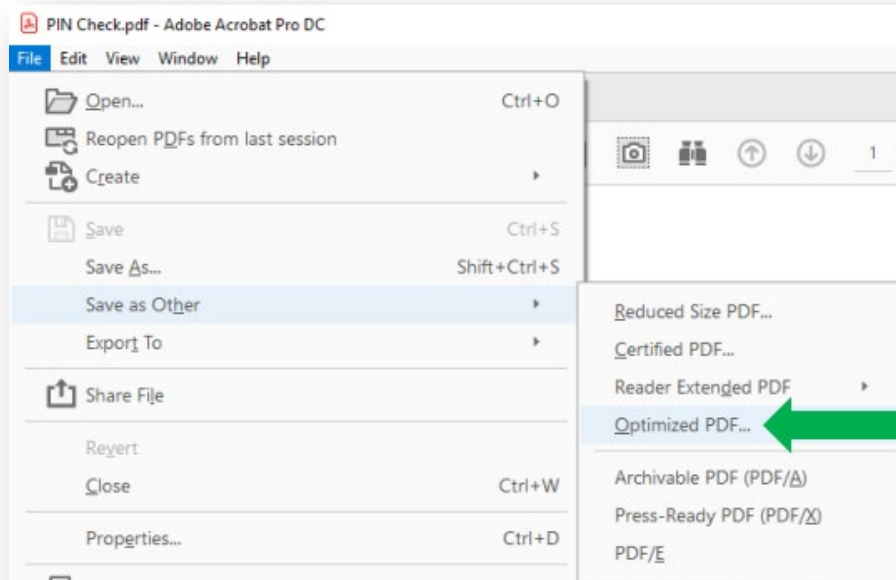
There are three ways to reduce file sizes, so they will upload: optimizing pdf, reducing pdf file size, saving as a different file type. Up to 20 documents (pdf, png, jpg, gif or jpeg) may be attached to a transaction.

Note: Adobe Acrobat DC is different than Adobe Reader. Adobe Reader *does not* allow file size adjustment. If you do not have a copy of Adobe Acrobat, please contact ITS, at itshelp@odu.edu or 683-3192 to request Adobe Acrobat.

Optimized PDF

Adobe Acrobat allows for optimization. If you do not have

To optimize in Adobe Acrobat, click "File" in the top left corner of the pdf, select "Save as Other" and then "Optimized PDF."
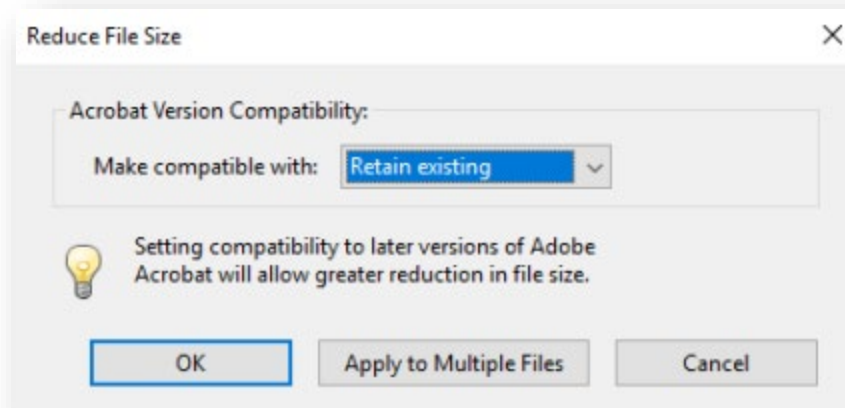
To reduce pdf file size in Adobe Acrobat, click "File" in the top left corner of the document. Select Save As>Other>Reduced Size PDF. *If you Adobe Reader and not Adobe Acrobat, please contact ITS at itshelp@odu.edu or 683-3192 to request Adobe Acrobat.*
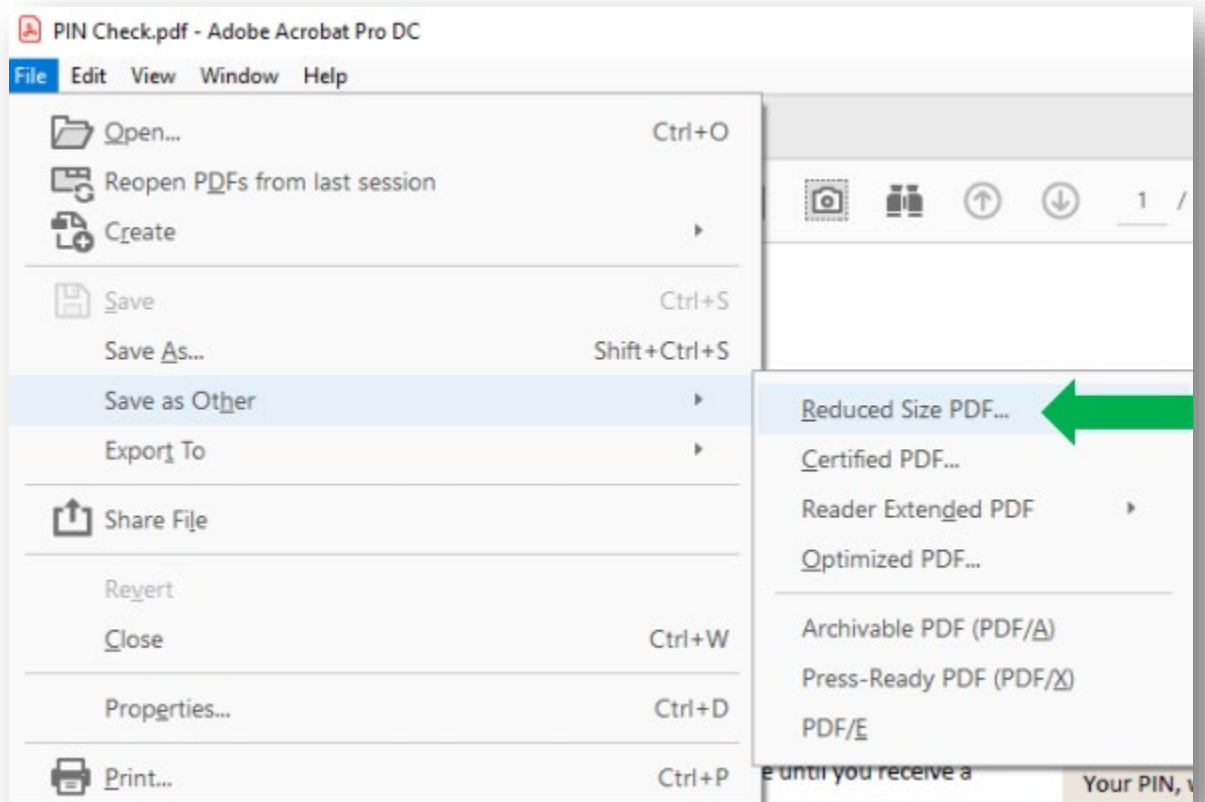
A box will open where "Retain Existing" should be selected. Click OK. This can reduce file size by almost half.

Reduce File Size ✕

Acrobat Version Compatibility:

Make compatible with: Retain existing ⌄

Setting compatibility to later versions of Adobe
Acrobat will allow greater reduction in file size.

OK   Apply to Multiple Files   Cancel

Save as Different File Type

Using a different file type will allow document size to be up to 10MB rather than 1MB. Files can often be "Saved As" different file types by clicking on "File" in the upper left corner, selecting "Save As" and changing the file type when selecting download location. Aside from pdf, the following formats are supported for Works document uploads: png, jpg, gif and jpeg.
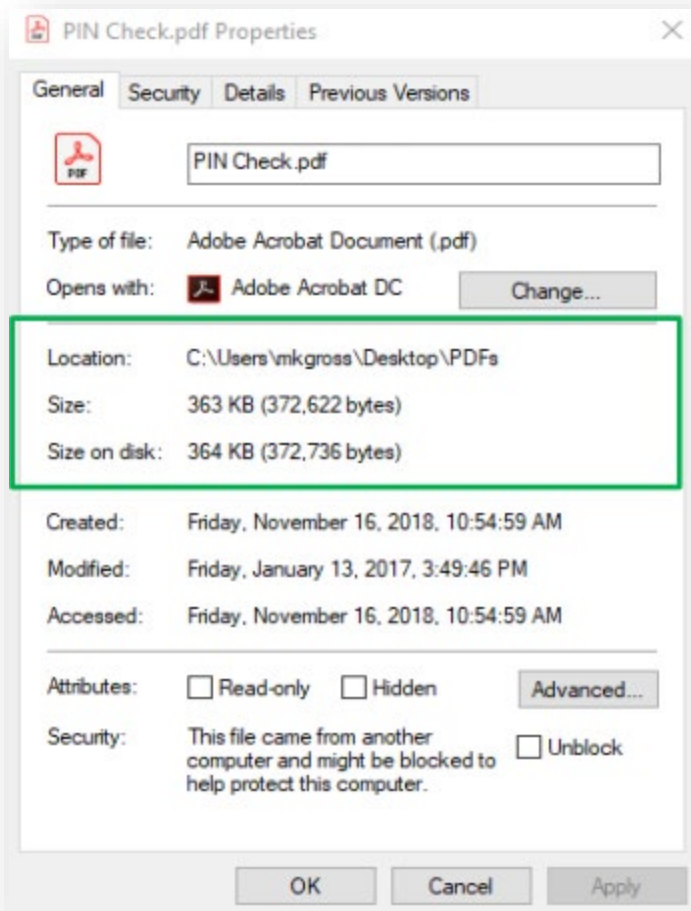
Check Document Size

To check document size, find document's location on computer and right click on the document name. Select "Properties" from the dropdown menu.
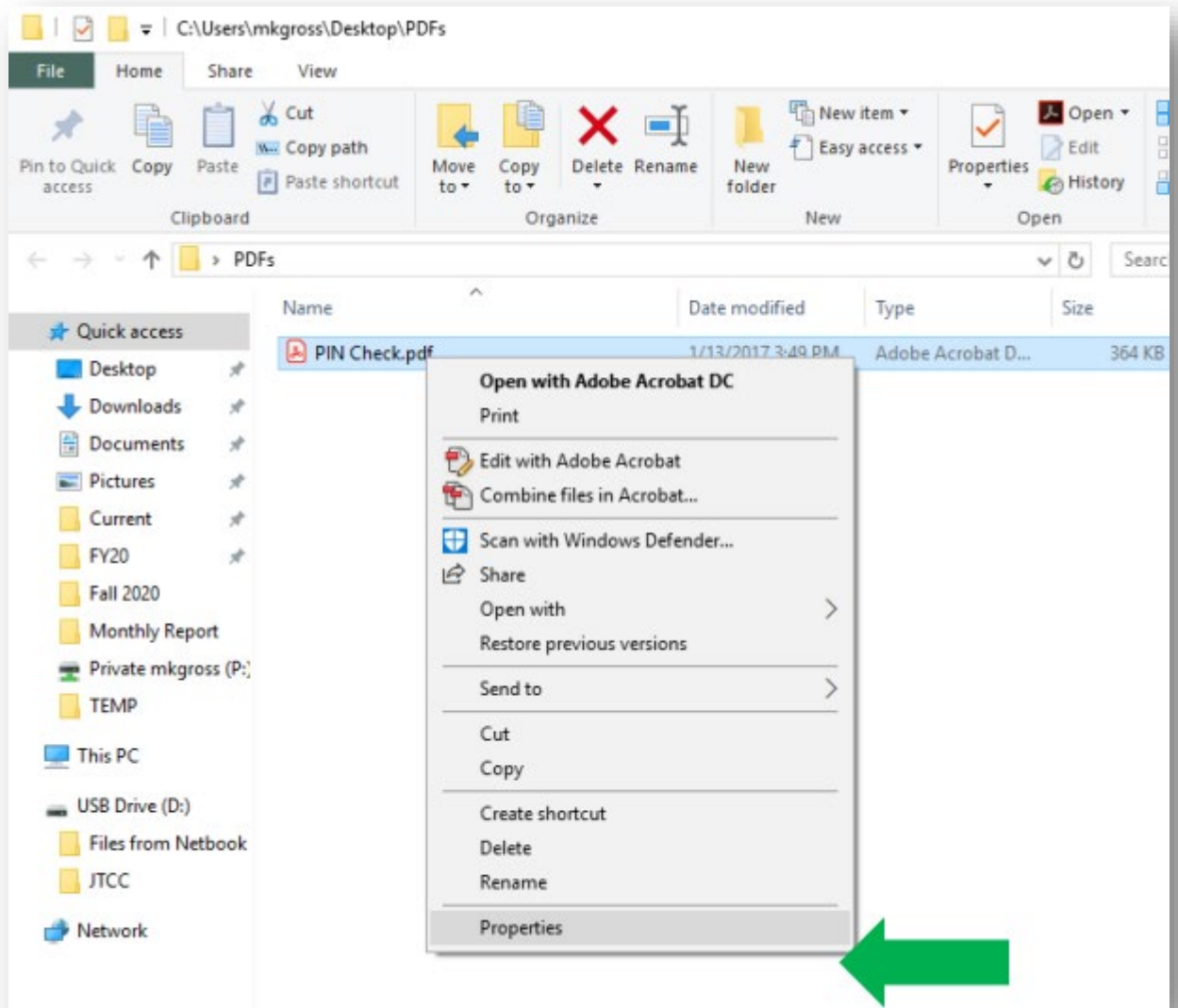
A pop up window will appear that includes file size information. If the size is larger than 1MB, it will need to be reduced to load properly in Works.

For reference: 1024KB = 1MB. If file size is shown in "MB" it must be reduced. If document size is larger than 1024 KB, it must be reduced. This Google Converter can help figure document size if needed.

PIN Check.pdf Properties   ✕

General | Security | Details | Previous Versions

PIN Check.pdf

Type of file: Adobe Acrobat Document (.pdf)

Opens with: Adobe Acrobat DC   Change...

Location: C:\Users\mkgross\Desktop\PDFs
Size: 363 KB (372,622 bytes)
Size on disk: 364 KB (372,736 bytes)

Created: Friday, November 16, 2018, 10:54:59 AM
Modified: Friday, January 13, 2017, 3:49:46 PM
Accessed: Friday, November 16, 2018, 10:54:59 AM

Attributes: ☐ Read-only ☐ Hidden   Advanced...

Security: This file came from another computer and might be blocked to help protect this computer. ☐ Unblock

OK   Cancel   Apply

Use a Cell Phone to Take Pictures of Receipts for Upload Instead of Scanning

Cell phones can be used to help with document uploads in two ways: using the camera or the Adobe scanning app. *Please make sure the scan is of the flat document, not lopsided with lovely bits of table creeping about the edges.*

Using Cell Phone's Camera

To use a cell phone camera to take pictures of receipts, simply take a picture of the receipt and email it to yourself. The picture can be saved to the computer and uploaded in the same way pdf documents are – except the allowable size for these imaged receipts is much larger at 10MB.
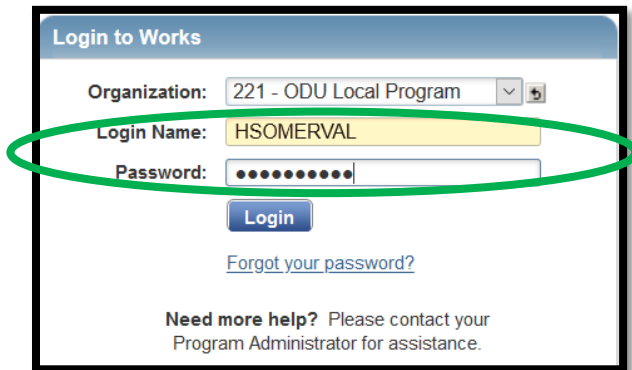
Using Cell Phone with Adobe Scanning App

To use the free Adobe scanning app, download the app in the Google Play Store or Apple App Store. Use the app to take a picture of the receipt that will be saved in pdf form; save the pdf; then email pdf to yourself. The pdf can be saved from the email and uploaded in the same way pdf documents from on campus scanners are.

Log In/Lock Out Issues in Works

Make sure that you are using all caps for the username when attempting to do a password reset; the Works system security is more stringent during a password reset than a standard log in.

From the log in page https://payment2.works.com you have 5 attempts to enter the correct log in credentials before the system locks you out.
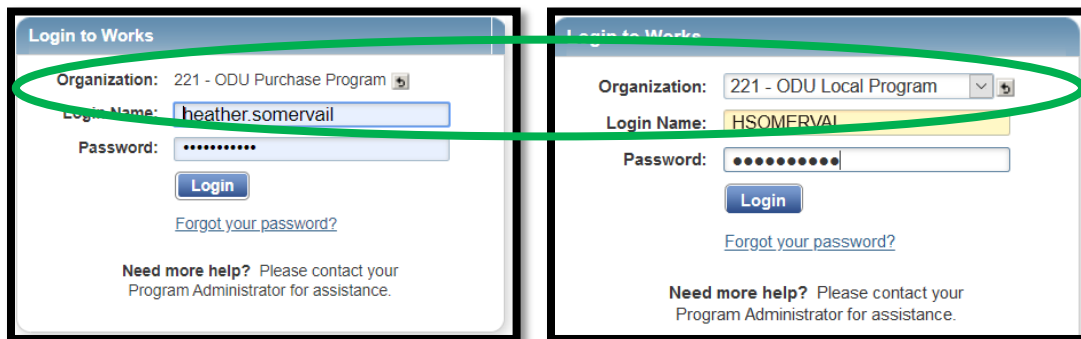
If you have two ODU BOA cards (Ex: Primary Card & Local or Primary & Travel), make sure the organization name is the one you need. Most pcard accounts are in the 221 – ODU Purchase Program. Athletics and Recreation & Wellness pcards are in the 221 – ODU Local Program. If the organization includes the word "Commonwealth" it is the Travel Card Program.
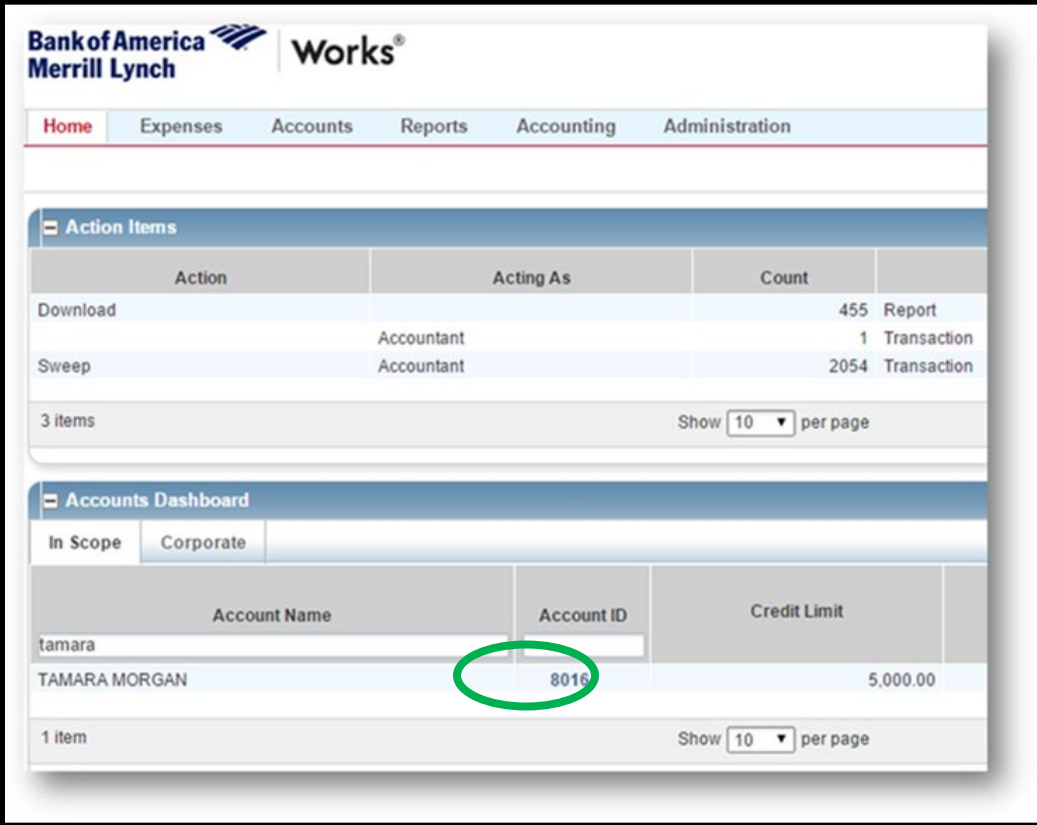

After 5 attempts, users are locked out for 30 minutes. Wait 30 minutes, then use the "Forgot your password" feature to have a temporary password emailed to you. Be sure to use all caps for the log in name when doing password resets, as the Works system security is more stringent during a password reset. *If you do not wait 30 minutes, the temporary password will not work.*

If you are still unable to log in, you may need to clear the cookies in your browser. If you are unsure how to do that, please contact ITS at itshelp@odu.edu or 683-3192.

Card Declines

To check why a card has declined, use the Authorization Log. *The Authorization Log shows recent transactions/declines and the real time balance (including purchases that have been authorized but are not fully posted to the account).*
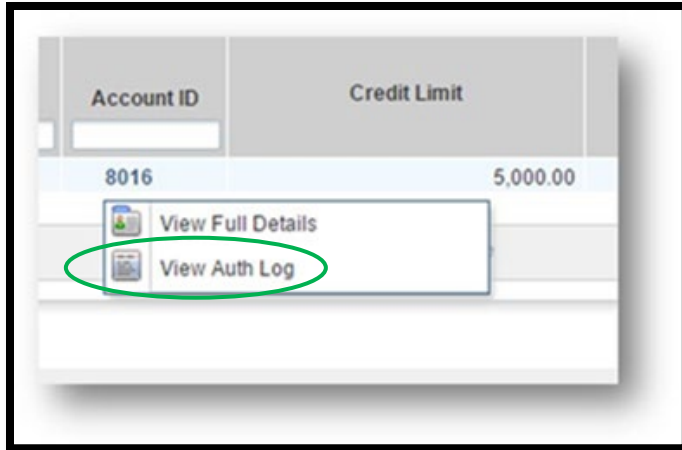
From the Works homepage, locate the last 4 digits of the account number (in blue) and click on them.

Click View Auth Log from the dropdown menu.

The Decline Reason gives details for a declined transaction. Also, the account's real time balance, which includes authorizations that have not yet posted, shows in the top right Available Funds area. Frequent decline reasons and remedies are included below.

- Declined for *Not Enough Available Funds* - Signoff by both Cardholder & Approver for pending transactions will free up funds.

- Declined for *Score **** – Bank of America (BOA) suspects fraud on the account. Call BOA's Fraud Specialists at 866-500-8262 or the number on the back of the PCard to verify recent activity on the account. If all recent transactions are valid, BOA will clear the flag from the account that caused declined transaction(s).

- Declined for *Invalid PIN* – PINs are established by the Cardholder. PINs can be checked in the BOA Payment Center.

- Declined for *Individual MCCG is Excluded* - Most often, a temporary adjustment can be done to allow a purchase of necessary items. Please email a request to PCardadmin@odu.edu including a description of the purchase needed, the vendor name & the MCC code (to the right of the merchant name in the authorization log).

Annual Training & Usage Analysis Extension

Will the required Annual Training and Usage Analysis that happens in the spring still be required? Yes, but we have requested an extension from the Department of Accounts in Richmond to allow these requirements to be fulfilled later in the year.

Travel Ticket Cancellations

Unused travel tickets purchased through CI Travel should be refunded in accordance with the VASCUPP contract. Any challenges with CI Travel ticket refunds may be escalated to Keith Wesp (CI Travel's signatory contact) at 757-640-9209.

Travel tickets purchased directly from airlines that are cancelled as a result of coronavirus are often refundable if the airline is contacted directly and informed that the cancellation is due to the coronavirus – even if the tickets purchased were nonrefundable.