

## Steps for P-Card Processing

CitiManager- Expense Management (CMEM) Login Information:

<https://www.globalmanagement.citidirect.com/>

User ID and Temporary Password provided via email after completion of p-card training

CitiManager® - Expense Management



### Sign In to CitiManager - Expense Management

\*User ID

This field is required

\*Password/Passcode

This field is required

\* All fields required

Sign In

To view transactions, select **Account Summary** under the **Financial** tab

CitiManager® - Expense Management



Financial Account Manager Reports Company User

Merchant Summary  
Account Summary  
Transaction Management >

 <b>MOST RECENT POSTING DATE</b> 03/11/2025	
 <b>TOTAL USERS</b> Previous 30 days	147
 <b>TOTAL LOCKED USERS &gt;</b> Previous 30 days	0
 <b>RECENTLY ADDED ACCOUNTS &gt;</b> Previous 30 days	1
 <b>RECENTLY ADDED CARDHOLDER USERS &gt;</b> Previous 30 days	0

 <b>COMPLETED REPORTS &gt;</b>
 <b>DATA FILES &gt;</b>
 <b>EXPENSE REPORT &gt;</b> 03/12/2025
 <b>EXPENSE REPORT &gt;</b> 03/05/2025

More

Your department's name will appear in a blue hyper link (example shown below), click on department name

Home > Search Reporting Structure

SEARCH REPORTING STRUCTURE

\* Indicates required field

<b>SEARCH CRITERIA</b>	<b>QUICK LINK</b>
Search By: <input type="text"/>	Select <a href="#">784 UNIV OF HOUSTON DWNTWN</a>  (Your assigned reporting level)
<input type="button" value="Search"/>	Recently Viewed: <input type="text" value="None"/>
	<input type="button" value="Select a Quick Link"/>

Click the **Reporting Cycle** box, select the reporting cycle month/year provided in the monthly Procurement Card Statement email, and click **Search**.

## ACCOUNT SUMMARY

784 UNIV OF HOUSTON DWNTWN • ONE MAIN ST STE 970-S • HOUSTON, TX77002-1014

\* Indicates required field

SEARCH CRITERIA [Advanced Search >](#)

Reporting Cycle: Mar. 2025  Date Range: From: 02/04/2025 To: 03/03/2025

(02/04/2025 to 03/03/2025)

Date Type: Posting Date

Date Type: Posting Date

Data available starting 03/12/2022

All cardholders with charges will appear (name, last 6 card number and amount). Click on last 6 of card number (blue hyper link). Shown below.

ACCOUNT SUMMARY

784 UNIV OF HOUSTON DWNTWN • ONE MAIN ST STE 970-S • HOUSTON, TX77002-1014

\* Indicates required field

SEARCH CRITERIA [Advanced Search >](#)

Reporting Cycle: Mar. 2025  
02/04/2025 to 03/03/2025

Date Type: Posting Date

Date Range: From: 02/04/2025 To: 03/03/2025

Date Type: Posting Date

Data available starting 03/12/2022

SEARCH RESULTS

Search Total: 11/10/2025

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Account Name	Account Number*	Transaction Amount	Adjustment Amount	Total Transaction Amount
784 UNIV HOUST DOWNTOWN	XXXX-XXXX-XX97-4042	0.00		

Cardholder's transactions will appear (cardholder name and last 6 of card number will be shown at the top left under Transaction Summary). You will need click the **Expand All** and **Edit Accounting Codes** icons in order to make changes to account, cost center and purpose/benefit.

TRANSACTION SUMMARY

John Doe XXXX-XXXX-XX43-2312 (Active) • CRIMINAL JUSTICE TRAINING CTR - LORENA SANCHEZ • 1 MAIN ST • HOUSTON, TX77002101401

\* Indicates required field

SEARCH CRITERIA [Advanced Search](#)

Reporting Cycle: Mar. 2025  
 02/04/2025 to 03/03/2025

Date Type: Posting Date

Date Range: From: 02/04/2025 To: 03/03/2025  
 Date Type: Posting Date

Data available starting 03/12/2022

SEARCH RESULTS

Search Total: 25.49

Page 1 of 1 Page

Detail	Posting Date	Transaction Date*	Description	Transaction Amount	Tax Amount	Additional Information
	02/20/2025	02/19/2025	OFFICE DEPOT #2809 HOUSTON, TX -77008	25.49		

Page 1 of 1 Page

Search Total: 25.49

SEARCH RESULTS

Search Total: 25.49

Page 1 of 1 Page

Detail	Posting Date	Transaction Date*	Description	Transaction Amount	Tax Amount	Additional Information
	02/20/2025	02/19/2025	OFFICE DEPOT #2809 HOUSTON, TX -77008	25.49		
<b>ACCOUNTING CODES INFORMATION</b>						
Expense Description						
Account	Business Unit	Fund	Dept. ID	Program		
53900	00784	2078	D0026	C0233		
Budget Reference	Project ID	Object Code	Chartfield 1			
BP2025	NA	7300				

Page 1 of 1 Page

Search Total: 25.49

Now type in Purpose/Benefit and make changes to account and cost center information. Once all changes are made click **Save** icon (top left). You will then take the necessary steps to run the expense report and receive necessary signatures.

SEARCH RESULTS

Search Total: 25.49

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Detail	Posting Date	Transaction Date*	Description	Transaction Amount	Tax Amount	Additional Information
	02/20/2025	02/19/2025	OFFICE DEPOT #2809 HOUSTON, TX -77008	25.49		

ACCOUNTING CODES INFORMATION

Display accounting codes from Account Level

Expense Description

Purpose/Benefit

Account	Business Unit	Fund	Dept. ID	Program
53900	00784	2078	D0026	C0233
53900	00784	2078	D0026	C0233

Budget Reference	Project ID	Object Code	Chartfield 1
BP2025	NA	7300	
BP2025	NA	7300	

Copy to All on Page

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Manage Cost

## Uploading Backup Into PeopleSoft

Login to Peoplesoft Finance. Once logged in, follow this path: Main Menu → Business Processes → AP → P/T Card

Favorites Main Menu

ORACLE

Add To Notifications NavBar

Personalize Content | Layout ? Help

Home Sign Out

Payable worklist

No Vouchers

Requisition Worklist

No Requisitions

Favorites Main Menu

ORACLE

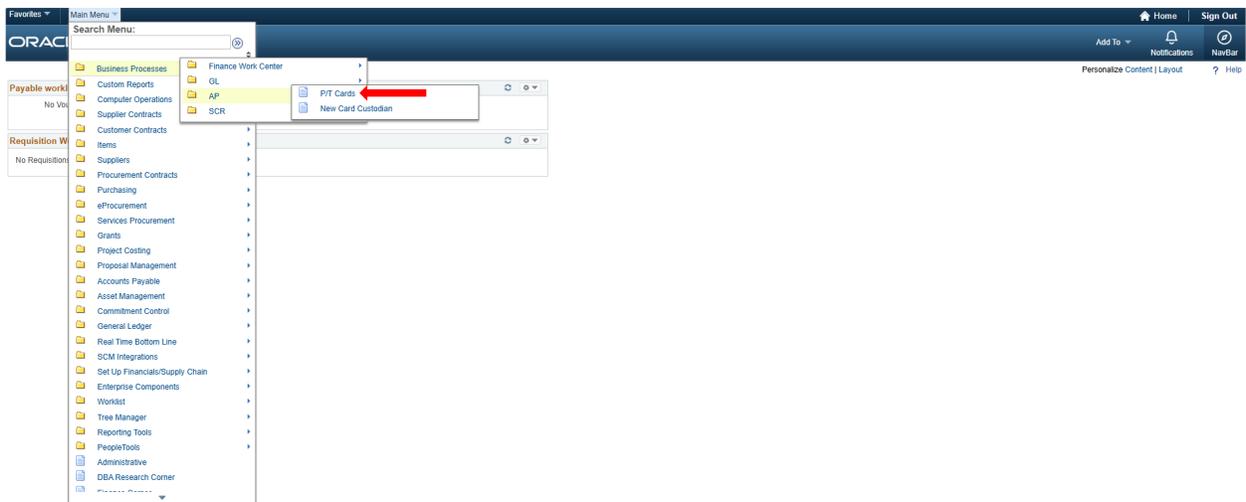
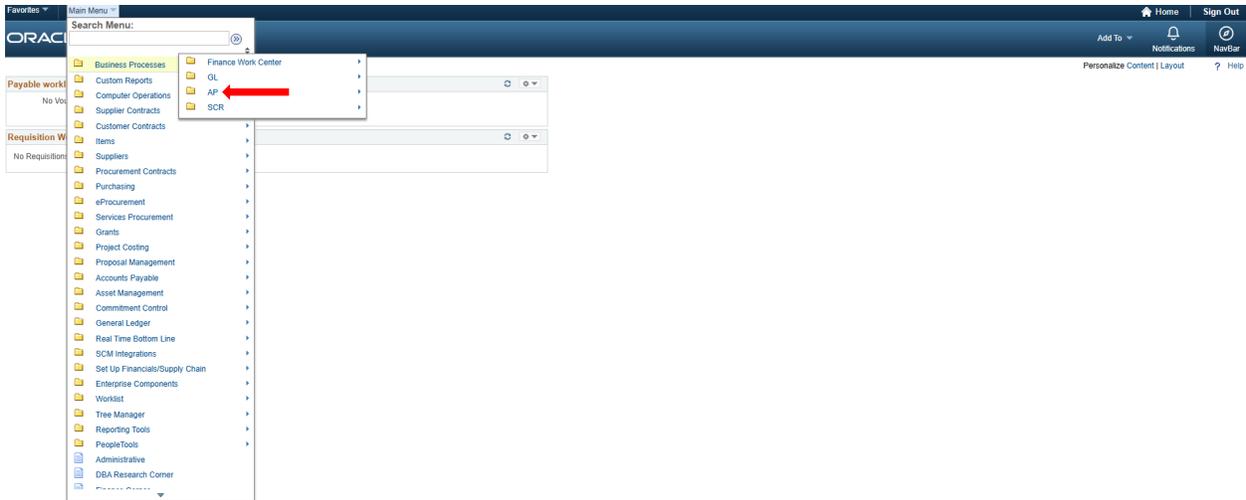
Add To Notifications NavBar

Personalize Content | Layout ? Help

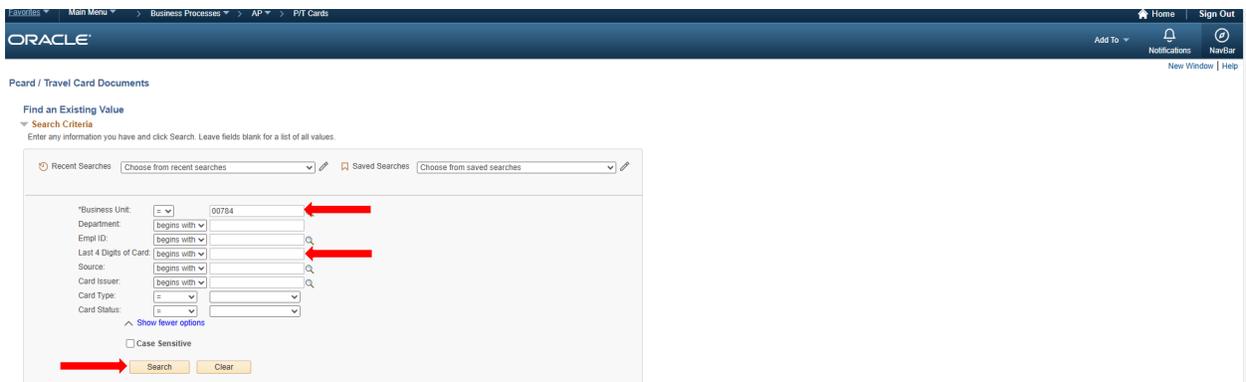
Home Sign Out

Search Menu:

- Business Processes
- Custom Reports
- Computer Operations
- Supplier Contracts
- Customer Contracts
- Items
- Suppliers
- Procurement Contracts
- Purchasing
- eProcurement
- Services Procurement
- Grants
- Project Costing
- Proposal Management
- Accounts Payable
- Asset Management
- Commitment Control
- General Ledger
- Real Time Bottom Line
- SCM Integrations
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
- Administrative
- DBA Research Corner



Once in the Pcard / Travel Documents screen, enter the Business Unit (00784), the Last 4 Digits of Card, and then click Search



Enter the cycle year (enter the current year and not the fiscal year), cycle month, and then click Add New Document

\*Please Note: Billing Cycle Month and Year will be included with the Monthly Procurement Card Statement Email\*

The screenshot shows the Oracle P Card Document Images page. At the top, there is a header with the Oracle logo and navigation links: "Add To", "Notifications", and "NavBar". Below the header, there is a "Documents" section with a "Group Box" containing fields for "Business Unit" (00784), "Card Type" (P Card), "Name", "Department", "Last 4 Digits of Card", and "Card Status" (Active). Below this, there is a "P Card Document Images" section with a table. The table has columns for "Active Status" (checked), "Card Issuer" (784LP), "Cycle Year" (2025), "Cycle Month" (March), and "Add New Document". Red arrows point to the "Cycle Year" and "Cycle Month" fields, and another red arrow points to the "Add New Document" button. At the bottom of the page, there are buttons for "Save", "Return to Search", "Notify", and "Refresh".

Choose your file and click Upload

The screenshot shows the Oracle P Card Document Images page with a "File Attachment" dialog box open. The dialog box has a title bar "File Attachment" and a text input field with the placeholder "Choose File | No file chosen". Below the input field are "Upload" and "Cancel" buttons. The background of the page is dimmed, showing the same "P Card Document Images" section as in the previous screenshot.