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Registering your US Bank Visa Pcard on Access Online

1. Open your internet browser.
   a. Internet Explorer 6.0 or greater for Windows and FireFox for Windows or Mac (Do not use any other browser)
2. Enter the following into your address bar: https://access.usbank.com
3. Click on the Register Online link on the Access Online Login Screen
4. Enter csuca in the Organization Short Name field
5. Enter the 16 digit Visa Account Number and select the expiration date of the card from the drop down menu
6. Click on the Register This Account button
7. Read the Licensing Agreement if desired, and then press the I Accept button
8. Enter User ID you want to be associated
9. Create your password
10. Enter the Authentication Question you want to use along with the response
11. Enter the following contact information:
   - First Name – Your first name
   - Last Name – Your last name
   - Address 1 – 2600 Nutwood Ave.
   - Address 2 – Ste. 300
   - City – Fullerton
   - State – Select CA
   - Zip Code – 92831
   - Country – Select United States
   - Phone Number – 657278 followed by your campus extension
   - Email Address – Enter your campus email address
12. Click on the **Continue** button
You will receive the above confirmation once your user account has been saved and associated with your US Bank Visa Pcard account

**Login to the Access Online system**

1. Open your internet browser  
   a. Internet Explorer 6.0 or greater for Windows and FireFox for Windows or Mac *(Do not use any other browser)*
2. Enter the following into your address bar: [https://access.usbank.com](https://access.usbank.com)
3. Enter the following on the Access Online Login Screen:  
   Organization Short Name: csuca  
   User ID: Your created User ID *(you must register your account following the process above the first time you access the system)*  
   Password: your created password
4. Click the Login button
5. You will see the home page.

Changing your password

1. From the home page, select **My Personal Information** link on the left menu bar.
2. Select the Password link.

3. Enter the current password
4. Enter the new password and re-enter the new password
5. Verify your Authentication Question and Response, make changes if necessary
6. Click on the Save button
How To View Your Cardholder Information

You can view the information for your account such as billing address, approving official and limits set for your account.
1. From the Home page, click on **Account Information** link.

2. Click on **Cardholder Account Profile** link

3. You can select the below listed links to see the corresponding information
   - **Demographic Information** – View the account name, address and contact information
   - **Account Information** – View the account status, cycle date, and open data
   - **Default Accounting Code** – View the default ChartField settings for your account
   - **Authorization Limits** – View the single purchase and monthly limits set to your account
   - **Financial History** – View account history
Reviewing Transactions in Access Online

1. Once you have signed into Access Online, click on Transaction Management link

2. On the next screen you can select Transaction List, View Previous Cycle, or View Pending Transactions to receive a list of transactions for the account
3. Click on the link under **Accounting Code** to view the ChartField allocations for the single transaction.

4. You can make changes to the ChartFields listed:
   i. You can also split a transaction to make allocations to two or more different ChartField strings (if available on your Pcard).
   ii. Put in the number of additional lines and click the **Add** button.
   iii. You can then split the transaction by amount or percentage.
   iv. The amount of each line must total up to the full amount of the transaction or the allocation cannot be saved.
Disputing a Transaction in Access Online

1. In the transaction list section of the program, select a transaction by clicking on the link under Accounting Code
2. Select the Summary tab
3. Click on the **Dispute** button

4. Select a dispute reason from the menu
5. Click the Select button

6. Check that your name is in the Requestor Name field

7. Enter your phone number

8. Enter comments in the Comments field

9. Click on the Continue button
10. You will receive a confirmation page which you need to print.

11. Click on the Transaction Detail link to return to the summary tab.

12. You will see a D icon displayed under the Status column.
13. You can cancel the dispute by clicking on the **Cancel Dispute** button.

Dispute information only reflects the last dispute filed for this transaction. More information available in Dispute History.

- **Dispute Reason:** Unauthorized
- **Dispute Date:** 03/02/2007
- **Dispute Post Date:**
- **Resolution Date:**
- **Requester Name:** Chris Doe
- **Dispute Status:** Unresolved

**Cancel Dispute**

You can click the **Cancel Dispute** button to cancel the dispute as long as the dispute is still unresolved. For training purposes, click the **Cancel Dispute** button now.

14. Enter the cancellation reason in the Cancellation Comments field and click **Yes, Cancel Dispute** button.

15. You can view the history of a dispute by scrolling to the bottom of the **Summary** tab and clicking on the **Plus** sign (+) next to **Dispute History**.

Dispute information only reflects the last dispute filed for this transaction. More information available in Dispute History.

- **Dispute Reason:** Unauthorized
- **Dispute Date:** 03/02/2007
- **Dispute Post Date:**
- **Resolution Date:**
- **Requester Name:** Chris Doe
- **Dispute Status:** Unresolved

**Dispute History**

Printing the **Transaction Detail Summary report**

1. If not already signed on, login to the Access Online system.
2. Click on the **Reporting** link

3. Click on the **Financial Management** link

4. Click on the **Transaction Detail** link
5. Select and/or enter the following data under each section
   
   i. **Date** – Select **Posting Date Range** and enter the Start and End date of the billing cycle *(provided in the email received each month with the summary of the # of transactions and total amount spent for the cycle)*

   ii. **Additional Detail** – Put a check in both boxes

6. Click on the **Run Report** button

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<td>Display Allocation Detail</td>
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<td>Page Break</td>
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</table>

Note: Page Breaks are applicable only if a Break/Subtotal Level is chosen.

**Run Report**  **Heat**  **Create Scheduled Report**
7. A PDF version of the report will open in a new window *(Requires adobe reader)*
8. Click the **Print** button on the adobe program

9. Open another web browser and navigate to the following website:
http://finance.fullerton.edu/Procurement/PCard/Forms/
10. Select the **Approval of Procurement Card Transactions** form. *(The form is a PDF document that allows you to fill in the required fields before printing.)*
11. Complete the required fields, then print and sign the form.
12. Attach all supporting documentation (ex: receipts, Directive 11 forms, etc.) to the Expense Log Report and forward to the Procurement Card Program Office, CP-300, after your Approving Official reviews/approves the transactions, and signs the form.