

P-Card Approver Instructions

Proceed to the Chase website smartdata.jpmmorgan.com. Log-in in with your user name and password you created. Your user name is usually the same as your user name to access your e-mail. Your password is something you created the first time you logged in. If you forget your user name or password, please contact me. I can reset your password or look up your user name.

Below is what your home page will look like. Your User Role should be Account Group Manager or Level Manager and not your Cardholder role.

smartdata

Home Financial Reports Company User

Home



Welcome Back MELANIE KALB
Last Visit: 11/04/2013
Most Recent Posting Date: 11/04/2013

User Role Company Program Administrator - 0088475 - OHIO WESLEYAN UNIVERSITY ▼

Program Activity Date Range: Previous 30 Days ▼

Users & Accounts		Transactions & Adjustments	
Total Users (Roles)	235	Total Transactions	728
Total Inactive Users (Roles)	143	Reviewed	502
Total Active Cardholder Users (Roles)	57	Not Reviewed	226
Total Locked Users (Roles)	0	Approved	478
Recently Added Cardholder Users (Roles)	6	Not Approved	250
Cardholder Users (Roles) with Activity	37		
Recently Added Accounts	8		
Total User Logins	368		

Inbox

Completed Reports (10)	Notifications (5)	Files (0)
 Copy of Cash Account Statement Completed Date 10/24/2013 Copy of Cash Account Statement Completed Date 10/23/2013 Cash Transaction Detail Completed Date 10/23/2013	 Reset Exported Status Process successfully completed Reset Exported Status Process successfully completed Reset Exported Status Process successfully completed	No files are available.

Hover over Financial

Hover over Transaction Management

Select Transaction Approval Summary

smartdata

[Home](#)
[Financial](#)
[Reports](#)
[Company](#)
[User](#)

Account Summary

Merchant Summary

Transaction Management

Retrieve Receipt Information

Account Statements

Transaction Approval Summary

Transaction Approval Processing

Reset Exported Status Processing

Home

Last Viewed

Most Recent

Total Users (Roles)

Total Inactive Users (Roles)

Total Active Cardholder Users (Roles)

Total Locked Users (Roles)

Recently Added Cardholder Users (Roles)

Cardholder Users (Roles) with Activity

Recently Added Accounts

Total User Logins

235

143

57

0

6

37

8

368

User Role

Company Program Administrator - 0088475 - OHIO WESLEYAN UNIVERSITY

Date Range:

Previous 30 Days

Transactions & Adjustments

Total Transactions

Reviewed

Not Reviewed

Approved

Not Approved

728

502

226

478

250

News & Links

1 of 4

System Access

Please be advised that security enhancements to the Smartdata site will occur on Nov 10, and may require updates to company configuration or

[Add](#) | [Edit](#) | [View All News](#)

Use the Purchase Optimizer™ to get the most from your program

SDRAM New Accounts Helpful Hints

Inbox

Completed Reports (10)

Notifications (5)

Files (0)

Copy of Cash Account Statement
Completed Date 10/24/2013

Copy of Cash Account Statement
Completed Date 10/23/2013

Cash Transaction Detail
Completed Date 10/23/2013

Cash Transaction Detail
Completed Date 10/23/2013

Daily Export to Jenzabar
Completed Date 10/23/2013

[View Completed Reports >](#)

[View Scheduled Reports >](#)

Reset Exported Status Process successfully completed

Reset Exported Status Process successfully completed

Reset Exported Status Process successfully completed

[View All Notifications>](#)

No files are available.

Resource Center

Smartdata Security Enhancements
Outline of the security changes that will be coming with the 13.3 release of Smartdata

Release 13.3 Training Schedule
Smartdata release 13.3 training schedule

Smartdata Contacts

13.2 Release Notes
Notes of the 13.2 Smartdata Release - June 16, 2013

13.1 Release Notes

Select the Quick Link (mine says "Ohio Wesleyan University").
Your quick link will either be your name or department.

Browser address bar: <https://smartdata.jpmorgan.com/sdng/navigatereportingstructure/navigatereportingstructureRender.d>

Navigation tabs: Search Reporting Structure, Purchase Request Details

Menu: File Edit View Favorites Tools Help

Suggested Sites: Suggested Sites, Get more Add-ons, Business Portal Common, OWU WebPort - Login Scr..., Search Chart of Accounts, Smartdata Online

Logos: CHASE, J.P.Morgan

Home Global Search

smartdata

Home Financial Reports Company User

Home > Search Reporting Structure


Search Reporting Structure

SEARCH CRITERIA

Search By:

Search

QUICK LINK

Select **OHIO WESLEYAN UNIVERSITY** 

(Your assigned reporting level)

Recently Viewed:

Currently logged in as: MELANIE KALB (mtkalb, Company Program Administrator)

© 1994–2014, MasterCard. All rights reserved. [Privacy Policy & Disclosures](#)

Select the date range. You should always look at least 2 months back.



smartdata

Home > Search Reporting Structure > Transaction Approval Summary

Transaction Approval Summary

MELANIE KALB • [REDACTED] • Accounting - Kathleen Gruber • 61 SOUTH SANDUSKY STREET • DELAWARE, OH 430152333

SEARCH CRITERIA

Date Type:

From: 10/06/2013

Posting Date

To: 11/05/2013

Data available starting: 11/05/2010

ADVANCED OPTIONS

Filter (starts with): None

Review Status: All

Search

Under Advanced Options, choose a review status of Reviewed and Not Approved.
Select Search.

Home > Search Reporting Structure > Transaction Approval Summary

Transaction Approval Summary

MELANIE KALB [REDACTED] • Accounting - Kathleen Gruber • 61 SOUTH SANDUSKY STREET • DELAWARE, OH 430152333

SEARCH CRITERIA

Date Type:

From: 10/06/2013

Posting Date

To: 11/05/2013

Data available starting: 11/05/2010

Search

ADVANCED OPTIONS

Filter (starts with):

None

Review Status:

All

All

Not Reviewed And Not Approved

Not Reviewed

Reviewed

Not Approved

Approved

Reviewed And Not Approved

Select the name of the person to view transaction detail.
After looking at the detail, you can then return to the Summary screen by going back a screen using the *bread crumb trail in blue*. Click the radio button under "Approved" to mark it approved. Click **"Save"**.

smartdata

Home

Financial

Reports

Company

User

Home > Search Reporting Structure > Transaction Approval Summary

Transaction Approval Summary

MELANIE KALB • [REDACTED] • Accounting - Kathleen Gruber • 61 SOUTH SANDUSKY STREET • DELAWARE, OH 430152333

Accounts:1

Transactions & Adjustments:2

Reviewed:0

Not Reviewed:2

Approved:0

Not Approved:2

SEARCH CRITERIA

Date Type:From:10/06/2013

Posting Date▼To:11/05/2013

Data available starting: 11/05/2010

Search

ADVANCED OPTIONS

Filter (starts with):None▼

Review Status:All▼

Page Total: 1,102.25 Search Total: 1,102.25

Page 1 of 1 Go to page: [] Go

Save Reset

SEARCH RESULTS

Not Approved	Approved	No Change	Account Name	Transactions Adjustments	Reviewed	Not Reviewed	Approved	Total	Net
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	MELANIE KALB	2 0	0 0	2 0	0 0	1,102.25 0.00	1,102.25
			Total	2 0	0 0	2 0	0 0	1,102.25 0.00	1,102.25

Page Total: 1,102.25 Search Total: 1,102.25

Page 1 of 1 Go to page: [] Go

Save Reset