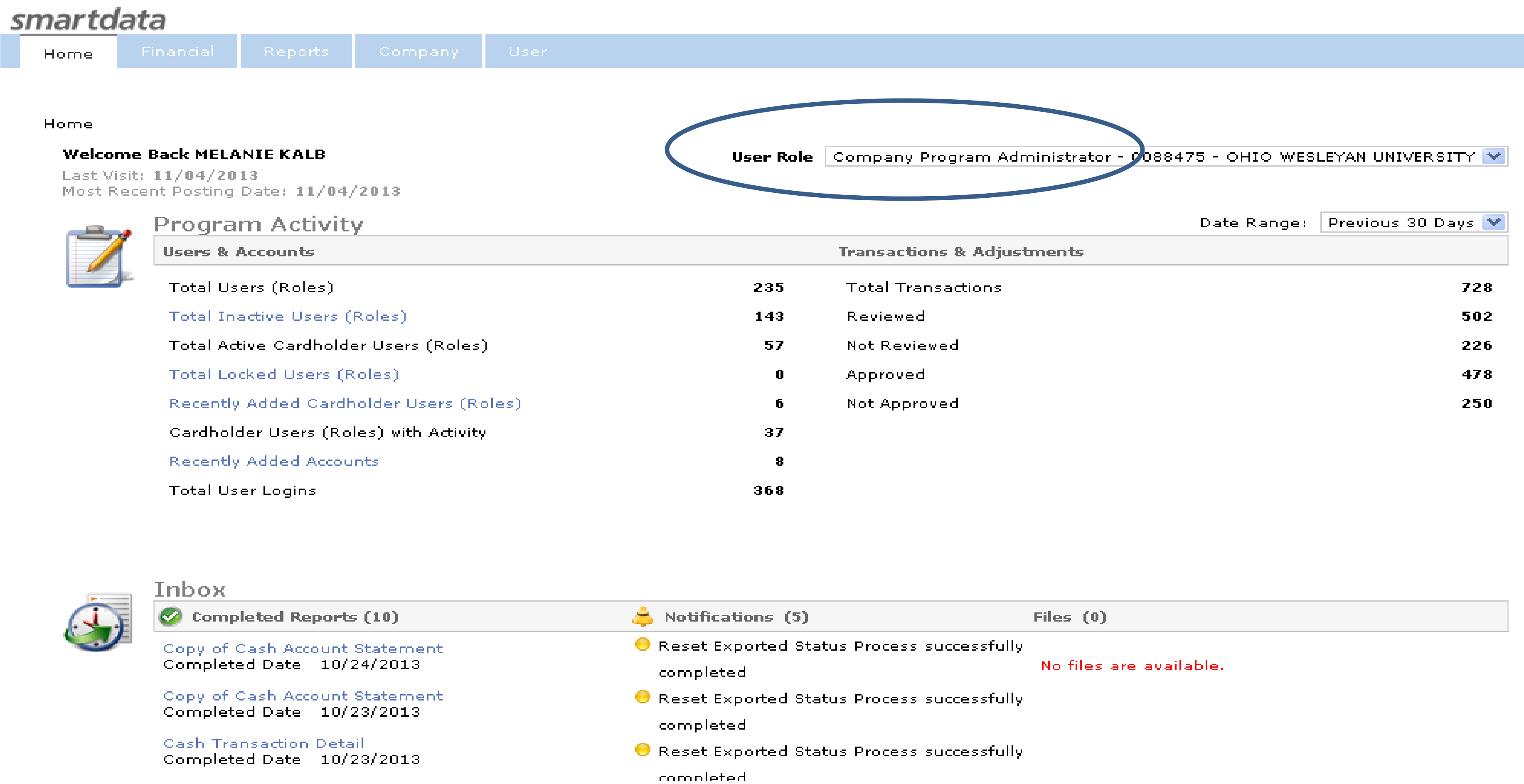
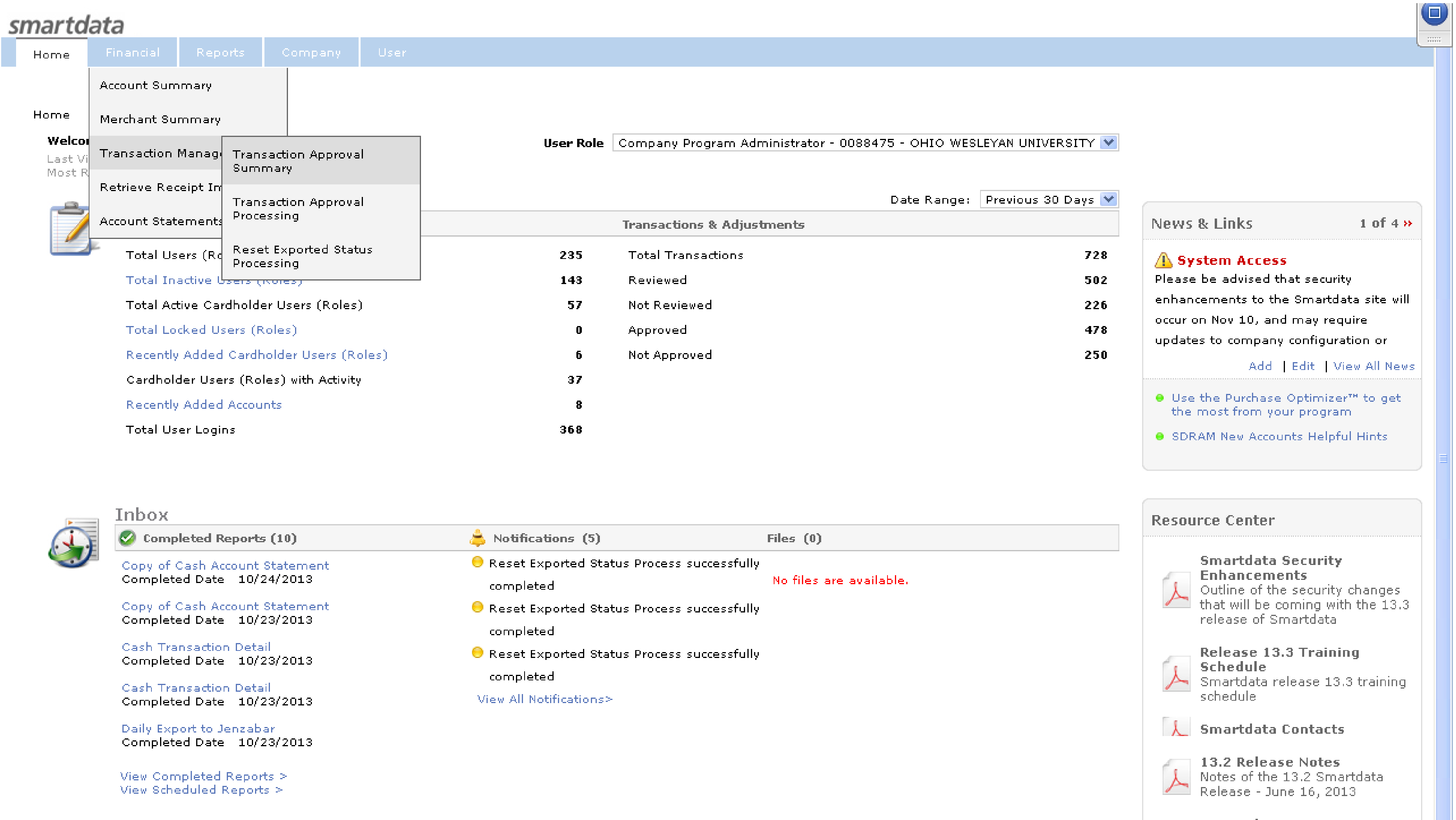
P-Card Approver Instructions

Proceed to the Chase website smartdata.jpmorgan.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.

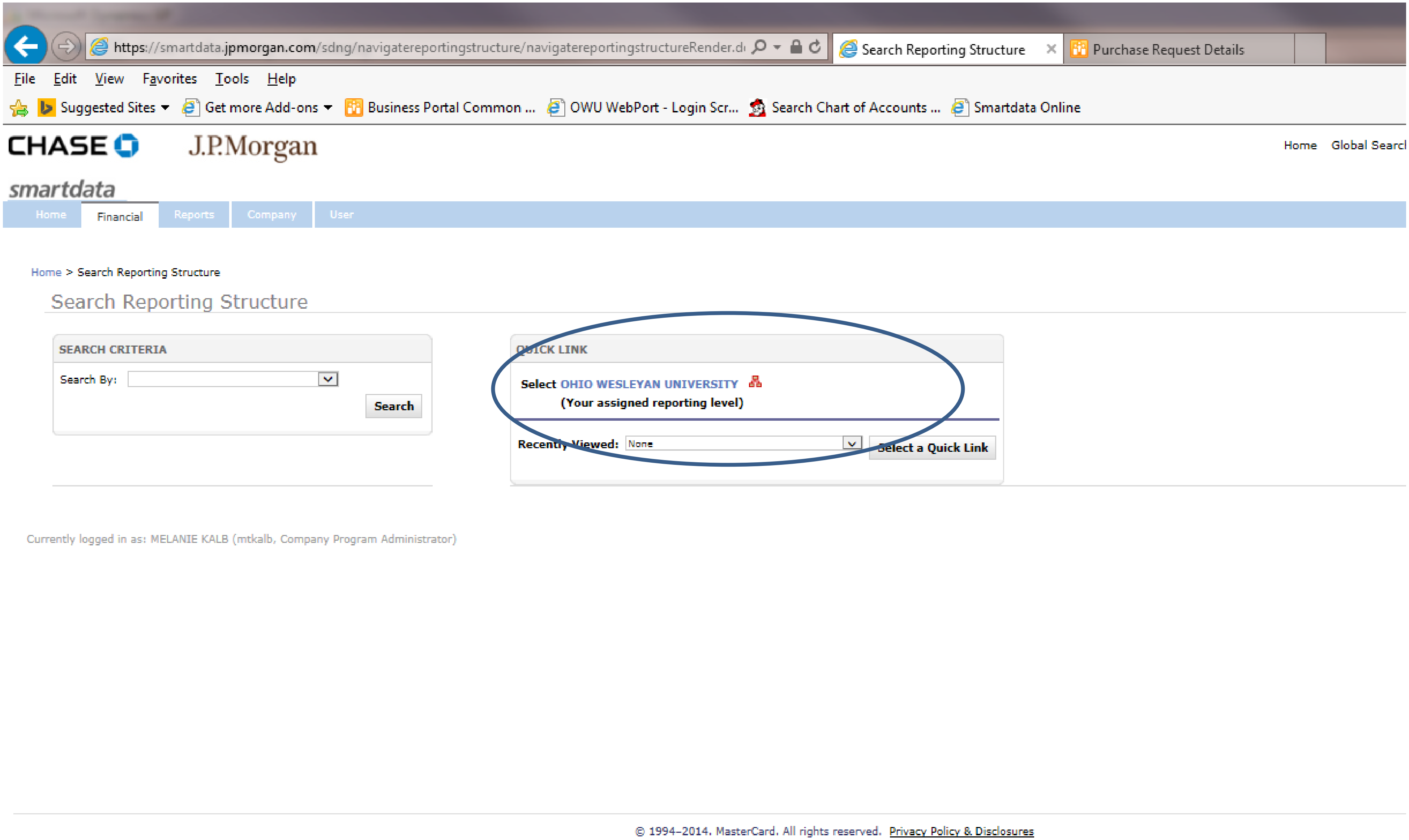
Below is what your home page will look like. Your User Role should be Account Group Manager or Level Manager and not your Cardholder role.



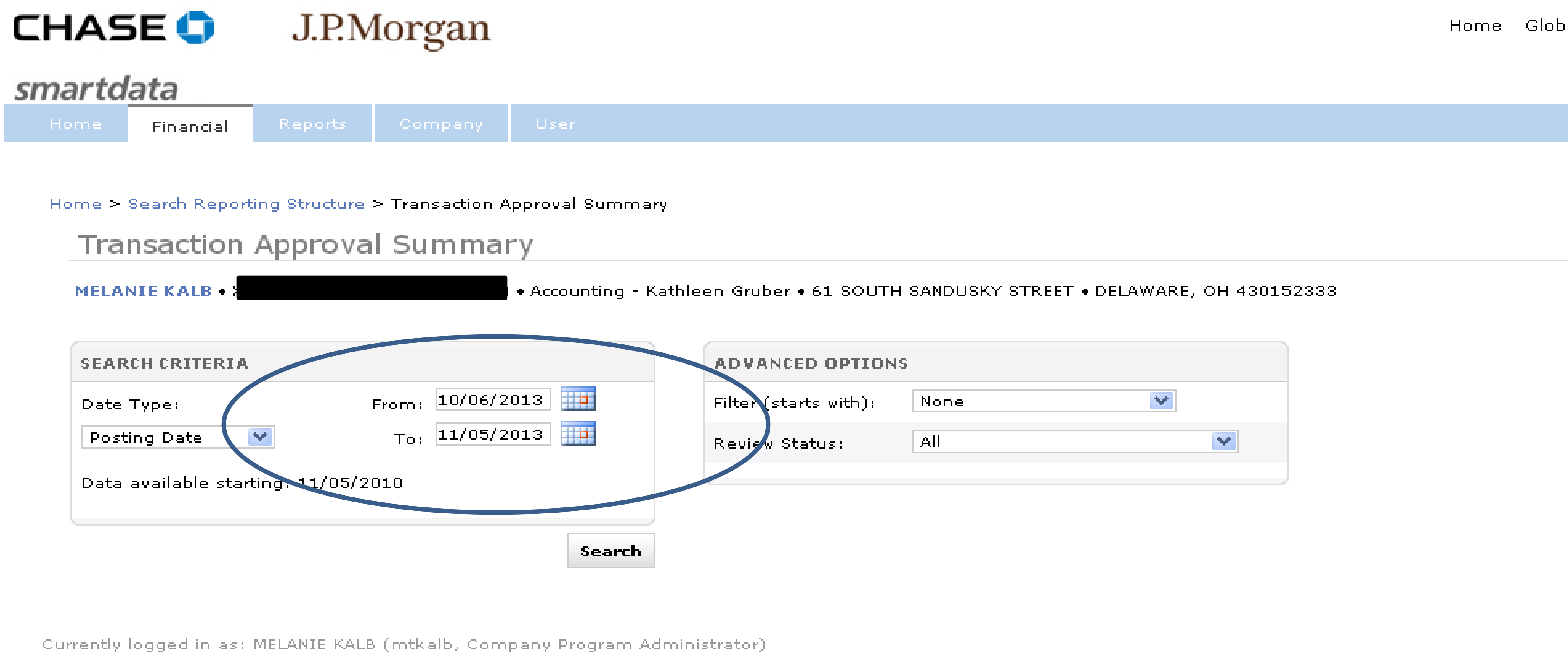
Hover over Financial
Hover over Transaction Management
Select Transaction Approval Summary



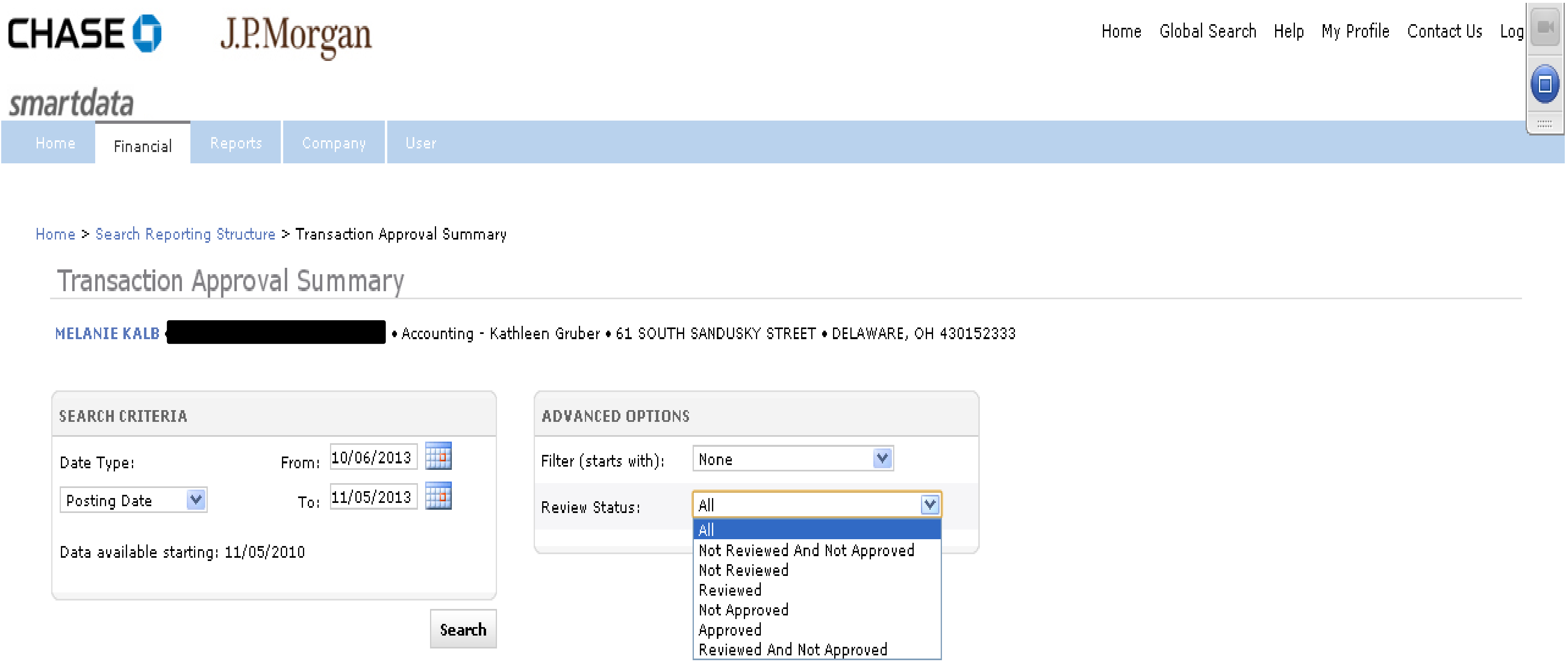
Select the Quick Link (mine says "Ohio Wesleyan University").
Your quick link will either be your name or department.



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



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



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: Posting Date

From: 10/06/2013

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
			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

Save Reset

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

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