PaymentNet™

Administrator Guide

Side One

Logging In

1) Open your internet browser and enter the following address:

   https://gov1.paymentnet.com

2) Enter the following on the PaymentNet Login Screen:
   - Organization ID = USDOCSP
   - User ID – **If cardholder**
     - o Initial First Name + last four digits of your Travel card + first four initials of last name (9 characters total max) e.g. J1234SMIT (for John Smith) If you do not have a travel card – the last four digits of your purchase card was used.
   - User ID - **If (non cardholder)**
     - o Initial first name + last name (9 characters max)
   -

3) **Pass Phrase:** < password> note lower case
   - Click Go.

   You will be prompted to change your pass phrase the first time you log on.

1) r and confirm the New Pass Phrase.

   Please Note: The Pass Phrase must be 6 characters long and is case

Viewing Transactions

From the menu bar, choose Transactions, then select Manage.

The Transaction List appears, displaying all of your transactions for the last 30 days.

- To view transactions older than 30 days, run an Advanced Query for Transactions (see Page Two).
- To save a different view on your screen to use later, choose Save Query, then name it.
- To save a different view as your default, choose Save Query, name it, then choose Save Default.

You may save as many views as you wish in your drop down.

Viewing Accounts

From the menu bar, choose Accounts, then select Manage.

The Account List appears, displaying all of the accounts associated with the user access.

To view specific accounts, run an Advanced Query for Accounts.

Viewing Employees

From the menu bar, choose Employees, then select Manage.

The Employees List appears, displaying all of the accounts associated with the user access.

Viewing Hierarchies

1) From the menu bar, choose Administration, then select Hierarchy, Manage.
2) Choose a hierarchy name.
3) Choose the “+” sign to expand or collapse hierarchy.
4) Click Add, Rename or Move to perform desired action.

Please Note: Very few OPCs should have this access.

New Query Options

New Query option is available from the Transaction, Accounts, and Employee screens.

To view New Query options, click the Look For pull down menu and select query option. Enter value and click GO.

You can use wildcard value “%” in Look For. Use it alone or with the starting number or letter of the query item.

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Your session will automatically “time out” after 15 minutes of inactivity.

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Side Two

Creating Queries

The Query option is available on the Transactions, Accounts and Employee screens. Click the option on the menu bar, or click Advanced.

Query is also available for Report creation.

- To create a query, select Criteria, Operation, and enter desired Value.
- To add additional Criteria, click the + button. To delete Criteria click the Trash icon.
- To add Hierarchy to a Query, click the + button. Enter the Hierarchy ID; if the Hierarchy ID is not known, click the Hierarchy ID link and select a hierarchy. To include all information associated with Hierarchy ID click the Include Children box. To delete hierarchy criteria, click the Trash icon.
- To sort the query; click the Order by + button. Select the Field and the Order Sequence.
- To save the Query in My Reports, click the Save button.
- To run the Query without saving, click the Process button.

Click the Reset button to clear the screen and re-start the process.

Saving Screen Views

1) From the menu bar on the home page, select My Profile.
2) Select the Screen View tab.
3) Select the Screen to Configure from the pull down menu. Each screen has standard default values set by your Level I OPC that you cannot edit.

   Screen Views include:

   - Accounts
   - Transactions
   - Employees
   - Merchants
4) Highlight Available Columns and click Add.
   - To select all columns, click Add All. Selected values move to the Selected Columns.
   - To modify the order of the fields, click the directional arrows to the right of the Selected Columns.
   - To deselect field, highlight field and click Remove.
   - To remove all fields except default values, click Remove All.
5) Click Save.

Creating Reports

1) From the menu bar, choose Reports, then select Create.
2) To specify a type of report, select it from the pull down menu.
3) Select the desired report by clicking the hyper-link under the report name.

   Report Query screen appears. This functions as described in the Query section of this guide.

   - To choose Report Format, select format from the pull down menu.
   - To Compress Output, click the appropriate button. This requires a password and is used to extract the report.
   - To schedule a report, click Schedule to Run Automatically for options.
   - To view reports, queries and exports, on the menu bar, choose Reports, then select Download. Click the report to be viewed.
   - To delete a report, click the box to the left of the report name to select, then click Delete Selected.
   - To update screen for reports, click Refresh.

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