Colorado State University

ACQUISITION CARD
PROGRAM

REALLOCATORS HANDBOOK

October 2008

TABLE OF CONTENTS

ACARD Reallocators Handbook

I. INTRODUCTION

The Acquisition Card Program (ACARD) is a purchasing method whereby users in the department are issued a MasterCard to make purchases under $3000.

The purpose of the ACARD System:

1. Notify cardholders, reallocators and approving officials with an e-mail message when transactions are downloaded from JPMorgan Chase – typically 3-5 days after a charge is processed. The ACARD System will also send a reminder e-mail before the end of the program cycle (24^{th} of the month) of unallocated transactions in that cycle.
2. Reallocate charges to valid FRS accounts and appropriate subcodes.
3. Provide access to various reports and queries.

Reallocators are responsible for:

1. Reallocating transactions from the default account and subcode (as necessary).
2. Informing the department Approver of transfers or terminations.
3. Assisting Approvers, as needed, to ensure the integrity of the ACARD program.
4. Printing monthly Cardholder Statements from the ACARD system and forwarding the cycle packet to the cardholder prior to the 15^{th} of the following month. Reallocators will receive an email notification informing them when the monthly Cardholder Statements are available.
5. Maintaining Cardholders files.

CSU ACARD System User Assistance:

ACARD Program Help Desk
Phone (970) 491-5752
Fax: (970) 491-5523
E-Mail: ACARD@purchasing.colostate.edu

II. LOGGING IN AND OUT OF THE ACARD SYSTEM

1. Logon to the ACARD System using the instructions provided by your LAN manager.
2. The ACARD System is case sensitive.
3. Enter in your login (Press ENTER) and password (Press ENTER) using lower case letters (your login and password are the same as your eID login and password).
4. Your password is case sensitive and must be lower case.
5. Automatic logoff occurs for sessions inactive for more than 30 minutes.

III. REALLOCATION SUMMARY

A. Transactions are transmitted daily to CSU from Bank One. They are available for reallocation as soon as they are transmitted from Bank One – usually 3-5 days after the transaction date.
B. Transactions will reference the cardholder's default account and subcode.
C. The goal is to reallocate within 10 working days.
D. You may reallocate several ways:
   1. Quick Reallocation
   2. Single Account Reallocation
   3. Multiple Account Reallocation
E. The ACARD System will allow reallocation only to valid accounts and subcodes.
F. You cannot reallocate to 2xxx (Salary & Benefits), 8xxx (Equipment) or 9xxx (Indirect Costs) subcodes.
G. Reallocated transactions are fed nightly to FRS.
H. Transactions, which have not been reallocated within 10 working days from the transmission date, will feed to FRS with the default account and subcode.

   EXCEPT

   Transactions within the previous cycle period, which have not been reallocated, will feed to FRS on the last working day of the month.

I. Transactions that have been reallocated to FRS may be reallocated again within ACARD up to 60 days from the original transaction date.

IV. REALLOCATION METHODS

A. Quick Reallocation
1. All transactions for a specified cardholder are displayed.
2. Any or all transactions for that cardholder may be reallocated to a single account and subcode.

B. Single Account Reallocation
1. Reallocate a specified transaction to a single account and subcode.
2. Enter data for a disputed transaction.
3. Enter data for a prohibited transaction (violation).

C. Multiple Account Reallocation
1. Reallocate a specified transaction to multiple accounts and/or subcodes.
2. Enter data for a disputed transaction.
3. Enter data for a prohibited transaction (violation).

V. ACARD SYSTEM COMMAND KEYS

Key	Function	Notes
#	Send cursor to the field number specified	
/	Erase all text within a field	
^	Move the cursor to the previous field	
BK	Back out of the transaction	Multiple Reallocation screen only
C	Current record	
DI	Go to the Dispute screen	Single and Multiple Reallocation screens only
EX	Exit from the screen	Data input **not** saved
FI	File or Save information that you keyed in	
L	List	Provides a list of valid codes to input
N	Go to the next record	
P	Go to the previous record	
PR	Print	Dispute screen only
Q	Quit	
R	Revise the transaction	
S	Save	Multiple Reallocation screen only
X	Exit from the screen	

VI. FRS FEED

Reallocated transactions are fed nightly to FRS, and identified with a batch reference of ACAnnn.

Acard Field	FRS Field
FRSacct	Account
Sub	Subcode
Not applicable	Transaction Code = 065
TranID	Ref 1
Reallocation Date	Date (mmdd)
Merchant	Description
Amount	Amount
Trn Date	Ref 2 (mmddyy)
Cardholder Name – First 11 digits	Ref 3
Not applicable	Batch (APPnnn)
Not applicable	Batch Date = date fed to FRS
Interchange Reference # (IRN)	Ref 4 – User Area

VII. QUICK REALLOCATION

A. When to Use

1. There are one or more transactions for a Cardholder.
2. Each transaction will be reallocated to a single account and subcode.
3. None of the transactions are in Dispute Status.
4. None of the transactions need to have a Violation recorded.

B. How to Get There

Go to:
Transaction Edit and Reallocation Menu
Quick Reallocation Screen

C. How to Reallocate

1. Enter a portion of the cardholder's last name in the Cardholder field.
   Press Enter.
   A list of Cardholders will appear.
   Enter the # of the cardholder whose transactions you wish to reallocate.
   Press Enter.

   OR

   All transactions available for reallocation will appear on the screen.

```
PC.TRANS.QEDIT        Colorado State University ACARD System              12-13-99
                             ** Quick Reallocate Entry **              csuguest

Cardholder:  000109 KATHY GRIFFITH

    TranID Trn Date Merchant            Amount D FRSacct Sub Vendor Name

 1 135366 09/16/99 SOURCE ONE CELL     60.43 D 414300 0798 SOURCE ONE CELLULAR
 2     3080 09/16/99 SOURCE ONE CELL     60.43 D 414300 0798 SOURCE ONE CELLULAR
 3   62808 09/16/99 SOURCE ONE CELL     60.43 D 414300 0798 SOURCE ONE CELLULAR

                         IS DATA CORRECT (FI/EX/#): ..
```

2. Column Headings:
   a. **TranID –** Automatic sequence number, assigned by the ACARD System at the time CSU receives the transaction from Bank One.
   b. **Trn Date –** Transaction Date (Purchase Date).
   c. **Merchant**.
   d. **Amount**.
   e. **D –** Debit (charge) or credit (return) indicator for the transaction.
   f. **FRSacct and sub –** FRS account number and subcode where the transaction is to be expensed.
   g. **Vendor Name –** Description to be sent to FRS.

3. For each transction you wish to **reallocate**:
   a. Enter the # of the transaction at the two dots (Press Enter).
   b. Input your account and subcode.
      If you reallocate to an account outside your department, you will get a warning message at the bottom left of the screen. Press Enter to continue data input.
   c. If you wish, you may change the vendor name. This field goes to FRS as the description. It is recommended that you **NOT** change the system supplied vendor name, unless it is unrecognizable.
   d. Press Enter.

4. To **save** your input:
   a. If there are multiple transactions on the screen,
      Input X at the two dots prompt. Press Enter.
      If there is only one transaction on the screen, skip step a.
   b. Input FI (file) at the IS DATA CORRECT prompt (two dots) to save your input.
   c. Press Enter.

5. To **reallocate** another transaction(s):
   a. Input your next transaction number at the two dots.
   b. Repeat above reallocation steps.

6. To **exit without saving**:
   Input X (Press Enter) at the IS DATA CORRECT (two dots) prompt.

   If there are multiple entries on your screen,
   Input X at the two dots,
   Input X (Press Enter) at the IS DATA CORRECT (two dots) prompt.

VIII. SINGLE ACCOUNT REALLOCATION

A. When to Use

1. There are one or more transactions for a Cardholder.
2. Each transaction will be reallocated to a single account and subcode.
3. A transaction needs to be placed in Dispute Status.
4. A transaction needs to have a Violation recorded.

B. How to Get There

Go to:

Transaction Edit and Reallocation Menu
Single Account Transaction Entry

C. How to Reallocate

1. Enter the transaction number in the transaction ID field. Press Enter. Transaction numbers can be obtained from the Quick Reallocation Screen, the Transaction Activity Reports or the email messages for each cardholder.
2. The transaction will appear on the screen.

```
PC.TRANS.1EDIT      Colorado State University ACARD System          12-13-99
                    ** Transaction One Account Edit **              csuguest
 Transaction ID:  135366        Trans Date: 09/16/99    Post Date: 09/20/99
 Cardholder    :  000109         KATHY GRIFFITH
                                PO BOX 7150
                                CH 220

 Merchant: SOURCE ONE CELLULAR PR    GOLDEN        CO  USA       SIC: 5964

 Original Trans. :   Account: 414300 0798     Amount:        60.43    D/C : D
 Foreign Currency:   Conv Date: 99261         Amount:        60.43    Code: 840

      **************** TRANSACTION EDIT FIELDS ****************
1. Status: N                      3. Vendor Name: SOURCE ONE CELLULAR
2. Notes :                        4. Violation  :

 --Fed to FRS Acct--             | 5. --Edit Account--
                                 |      414300   0798

                          IS DATA CORRECT? (FI/EX/#/DI): ..
```

3. On this screen you can input:
    a. **Status**
        A   Accepted (Post to FRS)
        D   Disputed (see Section X)
        N   Not Reviewed/Not Accepted
        R   Dispute Resolved
        X   Exit
    b. **Notes –** a 65 character note area.
       This field DOES NOT go to FRS.
    c. **Vendor Name –** sent to FRS as the description.
    d. **Violation (see Section XI)**
        C   Cash or cash type transaction
        I   Inappropriate purchase
        P   Personal Use
        R   Lack of receipt/original documentation
        S   Split purchase
        X   Exit
    e. **FRS account number and subcode –** where the transaction is to be expensed.

4. For each transaction you wish to **reallocate**:
    a. At a minimum, you must change the Status to Accepted (A) and input a FRS account and subcode.
       If you reallocate to an account outside your department, you will get a warning message at the bottom left of the screen. Press Enter to continue data input.
    b. Input 1 at the IS DATA CORRECT prompt (Press Enter).to go to the status field.
    c. Input A (Accepted) and press ENTER several times to go to field 5 (Edit Account).
    d. Input the account number and subcode (Press Enter).

5. To **save** your input:
   Input FI (file) at the IS DATA CORRECT prompt (two dots) to save your input. (Press Enter.)

6. To **exit without saving**:
   Input X (Press Enter) at the IS DATA CORRECT (two dots) prompt.

D. How to Re-reallocate

You may reallocate a transaction that has been reallocated previously (a re-reallocation). This must occur no more than 60 days from the original transaction date. Go to the Single Account Transaction Entry screen:

1. Enter the # of the transaction at the transaction ID field (Press Enter).
2. If the status field is N, go to step 3.
   If the status field is A, go to step 4,
3. Input 1 at the IS DATA CORRECT prompt (Press Enter).to go to the status field.
   Input A (Accepted) and press ENTER several times to go to field 5 (Edit Account).
   Input the new account number and subcode (Press Enter).
   Input FI (file) at the IS DATA CORRECT prompt and press Enter.
4. Input 5 at the IS DATA CORRECT prompt (Press Enter).
   Input the new account number and subcode (Press Enter).
   Input FI (file) at the IS DATA CORRECT prompt and press Enter.
5. To **exit without saving**:
   Input X (Press Enter) at the IS DATA CORRECT (two dots) prompt.

IX. MULTIPLE ACCOUNT REALLOCATION

A. When to Use

1. There are one or more transactions for a Cardholder.
2. Each transaction will be reallocated to multiple accounts and/or subcodes.
3. A transaction needs to be placed in Dispute Status.
4. A transaction needs to have a Violation recorded.

B. How to Get There

Go to:

Transaction Edit and Reallocation Menu
Multi-Account Transaction Entry

C. How to Reallocate

1. Enter the transaction number in the transaction ID field. Press Enter. Transaction numbers can be obtained from the Quick Reallocation Screen, the Transaction Activity Reports or the email messages for each cardholder. The transaction will appear on the screen.

```
PC.TRANS.ENTRY        Colorado State University ACARD System        12-13-99
                  ** Transaction Edit Display **                     csuguest
 Transaction ID:  135366        Trans Date: 09/16/99    Post Date: 09/20/99
 Cardholder   :  000109         KATHY GRIFFITH
                                PO BOX 7150
                                CH 220

 Merchant: SOURCE ONE CELLULAR PR    GOLDEN      CO  USA      SIC: 5964

 Original Trans. :    Account: 414300 0798    Amount:      60.43   D/C : D
 Foreign Currency:   Conv Date: 99261          Amount:      60.43   Code: 840

        ***************** TRANSACTION EDIT FIELDS *****************
1. Status: N                    3. Vendor Name: SOURCE ONE CELLULAR
2. Notes :                      4. Violation  :

 --Fed to FRS Acct--  ---FRS Amount--- | 5. --Edit Account--  --Edit Amount--
                                       |
                                       |
                                       |

                    IS DATA CORRECT? (FI/EX/#/DI): ..
```

2. On this screen you can input:
    a. **Status**
        A   Accepted (Post to FRS)
        D   Disputed (see section X)
        N   Not Reviewed/Not Accepted
        R   Dispute Resolved
        X   Exit
    b. **Notes –** a 65 character note area.
       This field DOES NOT go to FRS.
    c. **Vendor Name –** sent to FRS as the description.
    d. **Violation (see Section XI)**.
        C   Cash or cash type transaction
        I   Inappropriate purchase
        P   Personal Use
        R   Lack of receipt/original documentation
        S   Split purchase
        X   Exit
    e. **FRS account number and subcode –** where the transaction is to be expensed.
    f. **Amount**.

3. For each transaction you wish to **reallocate**:
   (See Example on next page)
    a. At a minimum, you must change the Status to Accepted (A) and input at least two FRS accounts and/or subcodes.
    b. Enter the # of the field(s) you wish to edit at the two dots (Press Enter).
    c. Input your changes, and Press Enter to move between each field.

4. To **save** your input:
   Input FI (file) at the IS DATA CORRECT prompt (two dots) to save your input. (Press Enter).

5. To **exit without saving**:
   Input X at the two dots (Press Enter) until you are at a blank screen.

6. **Example: To reallocate to 2 accounts**
    a. Enter 1 at the two dots to input the status.
    b. Input A and press enter.
    c. Press enter until you are back to the two dots prompt.
    d. Enter 5 at the two dots to input the account number and subcode. (Press Enter).
    e. Input R (reallocate) at the two dots (Press Enter).

    f. Input 1 to begin data input for the 1st account/line to reallocate to.
    g. Input the account number.
    h. Input the subcode.
    i. Input the amount and Press Enter.
    j. If you wish, you may change the vendor name. This field goes to FRS as the description.
    k. Press Enter to continue.

    l. Input 2 to begin data input for the 2nd account/line to reallocate to.
    m. Input the account number.
    n. Input the subcode.
    o. Input the amount and Press Enter.
    p. If you wish, you may change the vendor name. This field goes to FRS as the description.
    q. Press Enter to continue.

    r. When you have completed reallocation for this transaction, input X at the line number prompt to exit.

    s. To **save** your input:
    Input FI (file) at the IS DATA CORRECT prompt (two dots) to save your input. (Press Enter).
    Input S to save your input.

    t. In you have NOT saved your input you can **change/revise a line**. Input the line # you wish to correct to revise the account, subcode or amount.

    u. If your **addition is wrong**, you will get an error message at the bottom of your screen. This will state the edit amount does not match the transaction amount. Input C to go back to the reallocation screen to correct your input.

D. How to Re-reallocate

At this time, you may not reallocate a transaction that has been reallocated previously to multiple accounts. In order to change previously reallocated accounts/amounts, you should request a CIS Journal Entry Correction. See CIS Manual for instructions.

X. DISPUTED TRANSATIONS

Refer to the Cardholder Handbook for policy details.

1. Reasons for Disputes – The following may be formally disputed with Bank One.
   a. Unauthorized charges and unrecognized charges, including phone or mail order charges.
   b. Difference between dollar amount authorized and dollar amount charged.
   c. Duplicate charges.
   d. Returned merchandise. Your account has not yet been credited in the ACARD system, but you have received a credit voucher from the merchant or have been told by the merchant that they will issue a credit.
   e. Un-received goods.
   f. Defective merchandise.
   g. Altered Charges

The Cardholder is responsible for contacting JPMorgan Chase to initiate the dispute process and notify his/her reallocator. A dispute can be processed via phone, mail/fax or email. An attempt should always be made to resolve the dispute with the merchant, if possible, prior to reporting the dispute to the bank.

The Dispute Department can be contacted via the methods below:
Phone: 888-297-0768
Fax: 847-931-8861
Mail: JPMorgan Chase/ PO Box 2015/Elgin, IL 60121-2015
Email: ccs-disputes@jpmchase.com

The bank immediately issues a credit for the dispute, pending correspondence with the merchant. Both the charge and the credit need to be reallocated in the ACARD System.

2. ACARD Dispute Process
   Input the dispute information on the Single Account or Multi-Account Transaction Entry screen.
   a. You must input D in the STATUS field.
   b. Enter any notes in the Notes field.
   c. Enter your FRS account and subcode.
   d. At the two dots, you must input DI (Press Enter).
   e. The system will take you to a Dispute Entry screen.
   f. Input 1 at the IS DATA CORRECT prompt.
   g. Input the Dispute Date (mmddyy), Amount and any Notes, pressing Enter to move between the fields.

3. To **save** your input:
   Input FI (file) at two dots (Press Enter).
   Input FI a second time at the IS DATA CORRECT prompt.

4. To **exit without saving**:
   Input X at the two dots (Press Enter).

XI. PROHIBITED TRANSACTIONS (VIOLATIONS)

Refer to the Cardholder Handbook for policy details.

1. A Violation Warning form is to be completed by the cardholder and signed by their Approver for any of the following violations. The approver will determine the future status of the card, requirements for additional training, or other possible consequences of ACARD violations.

    a. Personal purchases
    b. Cash or cash type transactions
    c. Split purchases
    d. Inappropriate purchases
    e. Lack of documentation
    f. Non-compliance with current ACARD program policies

2. ACARD System Process
   Input the violation information on the Single Account or Multi-Account Transaction Entry screen.
    a. Input A in the STATUS field.
    b. Enter any notes in the Notes field.
    c. Enter the reason for the violation.
       C Cash or cash type transaction
       I Inappropriate purchase
       P Personal Use
       R Lack of receipt/original documentation
       S Split purchase
       X Exit
    d. Enter your FRS account and subcode.

    e. To **save** your input:
       Input FI (file) at two dots (Press Enter).

    f. To **exit without saving**:
       Input X at the two dots (Press Enter).

XII. REPORTS

A series of reports are available for transaction activity and cardholder information. Each report offers a selection screen for information to be included on the report. You may view the report on the screen, and/or print a copy of the report.

A. Transaction Activity Reports

From the main menu,
Input 2 (Report and Query Menu),
Input 1 (Transaction Activity Reports).

1. Listing of Transactions

This report lists all transactions for a specified monthly cycle or within a date range for a specified cardholder or approver.

a. To **duplicate a cardholder statement**:

Selection Fields:
Cycle Period (Month) – Enter as mm/yy (Press Enter).
Hierarchy # - Input your hierarchy number(s) (Press Enter).
OR
Cardholder Account - Input a portion of the cardholder's last name (Press Enter)
Press Enter to continue.
Input Y at the Would you like to print the report just displayed? Prompt to print the statements (Press Enter).

To **print all statements for your department:**
Follow steps above except in the hierarchy #, input 40xxxx, where xxxx is your department number. Example: to print all statements for department 6003, input 406003 in the hierarchy # field and press Enter.

b. To **display transactions within a date range**:

Selection Fields:
Press Enter to go to the Beginning Transaction Date field.
Beginning and Ending Transaction Dates – Enter as mm/dd/yy (Press Enter).
Hierarchy # - Input your hierarchy number(s) (Press Enter).
OR
Cardholder Account - Input a portion of the cardholder's last name (Press Enter)
Press Enter to continue.
Input Y at the Would you like to print the report just displayed? Prompt to print the statements (Press Enter).

2. Unallocated Transaction Report
(Available to Accounts Payable and Purchasing only)

This report lists all transactions that need to be reallocated. Transactions can be selected by cardholder, approver, post date, transaction date, transmit date or FRS default account.

Selection Fields. Enter one or more selection criteria.
Cardholder Account – Enter a portion of the cardholder's last name.
Approving Official – Enter the approving official hierarchy number.
Post Dates (Date the transaction was posted at JPMorgan Chase) – Enter as mm/dd/yy
Transaction Dates (Date of purchase) – Enter as mm/dd/yy.
Transmit Dates (Date of transmission from JPMorgan Chase) – Enter as mm/dd/yy.
FRS Account – enter the 6-digit default account of the cardholder, a subcode is not needed.

3. **Transaction Status Report**
This report lists transactions for a specified hierarchy level (cardholder or approver or department or college), within a date range. This report offers the option to display transactions with all statuses, or for a single status value.

Selection Fields.
Hierarchy level - Enter 1 through 4.
Enter the hierarchy level ID number.
Beginning and Ending Dates – Enter as mm/dd/yy.
Status Values:
Press Enter to display all status values.
A – Accepted. Transaction has been reviewed and reallocated.
D – Disputed. Transactions that are currently in dispute with JPMorgan Chase.
H – Hold. Problem transaction.
N – Not Reviewed/Accepted. Transaction has not been reallocated.
R – Dispute Resolved. Transactions that had been placed in Dispute status, but have been resolved with JPMorgan Chase.

4. **Transaction Edit Report**
This report lists the FRS posting information for a specified transaction.

Selection Fields.
Transaction ID – Enter the transaction ID number (Press Enter).

5. **Transaction Summary Report**
This report lists which cardholders have statements for the cycle period. It summarizes the count and net dollars of cardholder transactions. Transactions are selected by hierarchy level.

Selection Fields.
Hierarchy level – Enter 1 through 7.
Enter the hierarchy level ID number.
Enter mm/dd/yy for the specific cycle period. The ending cycle day is the 24th of the month.

6. **Interchange Reference Number Display**
   This report displays the Interchange Reference Number (IRN) for a specified transaction. The IRN is a 23 character number used by the banking system to identify individual transactions. This would be used if you are discussing a transaction with the merchant; or used when you report disputed transactions to JPMorgan Chase.

   Selection Fields. Enter one or more selection criteria.
   Transaction ID – Enter the transaction ID number.
   Cardholder Name - Enter a portion of the cardholder's last name.
   Merchant Name – Enter the merchant's name.
   Transaction Date – Enter the transaction date as mm/dd/yy.

B. Cardholder Information Reports

1. **Cardholder Inquiry Information**
   (Available to Accounts Payable and Purchasing only)
   This report displays general information about a cardholder. The information displayed includes card limits, expiration dates, and the hierarchy structure for a cardholder.

   Selection Field.
   Cardholder – Enter a portion of the cardholder's last name.

2. **Cardholder Delivery Addresses Information**
   This report displays address information about a cardholder. The information displayed includes delivery address, phone number and email address for a cardholder.

   Selection Field.
   Cardholder – Enter a portion of the cardholder's last name (Press Enter).

   Special Note:
   After inputting the cardholder's name, **IF** more than one cardholder's name appears:
   Input the number of the cardholder
   A ***** will appear to the left of the cardholder's name
   Input Q to Quit
   The cardholder's information is displayed.

3. **Cardholder Inactivity Report**
   (Available to Accounts Payable and Purchasing only)
   This report lists information for cardholder's who have not used their card since a user specified date.

   Selection Field.
   Enter the hierarchy level ID number OR press Enter to display all cardholders.

   This report takes a few minutes to run.
   Wait for the screen to display the message "Would you like to print the report just displayed?" at the bottom left of the screen.

4. **Cardholder Status Report**
   (Available to Accounts Payable and Purchasing only)
   This report displays card status information for cardholders within a unit. The information displayed includes cardholder name, card expiration date. For cancelled cards, the cancel date and reason are displayed.

   Selection Field:
   Enter the hierarchy level ID number.
   Status:
   - Enter – to display all cardholders
   - A – active cardholders
   - C – cancelled cards

   Cancel Reasons:
   - F - Transfer
   - R - Revoked
   - S – Stolen/Lost
   - T – Terminated

5. **Cancelled Card Activity Report**
   (Available to Accounts Payable and Purchasing only)
   This report lists any activity that has occurred on a card flagged as cancelled.

   Selection Field:
   Cancellation Date – Enter a date as mm/dd/yy.

C. Other Reports

Other management reports for Merchant, Cardholder and Program Information are available for Accounts Payable and Purchasing Users only.

E. Configuring a Session

Suggested PuTTY (Release 0.60) Configuration for ACARD

Beginning in October 2008, access to the University's ACARD application will require a secure shell client. PuTTY, Release 0.60, in SSH2 mode is the recommended and supported Microsoft Windows client. Because SSH is already available on the ACARD system, PuTTY may be used prior to the required cut-over date.

PuTTY does not require a formal Windows install. After obtaining putty.zip from the ACNS software download web page, simply unzip the file into a write accessible directory. For example, some administrators may prefer to extract the files to "\Program Files\PuTTY" – typically, installing in the "Program Files" directory requires administrator level access permissions. However, administrative access should not be required to run the programs.

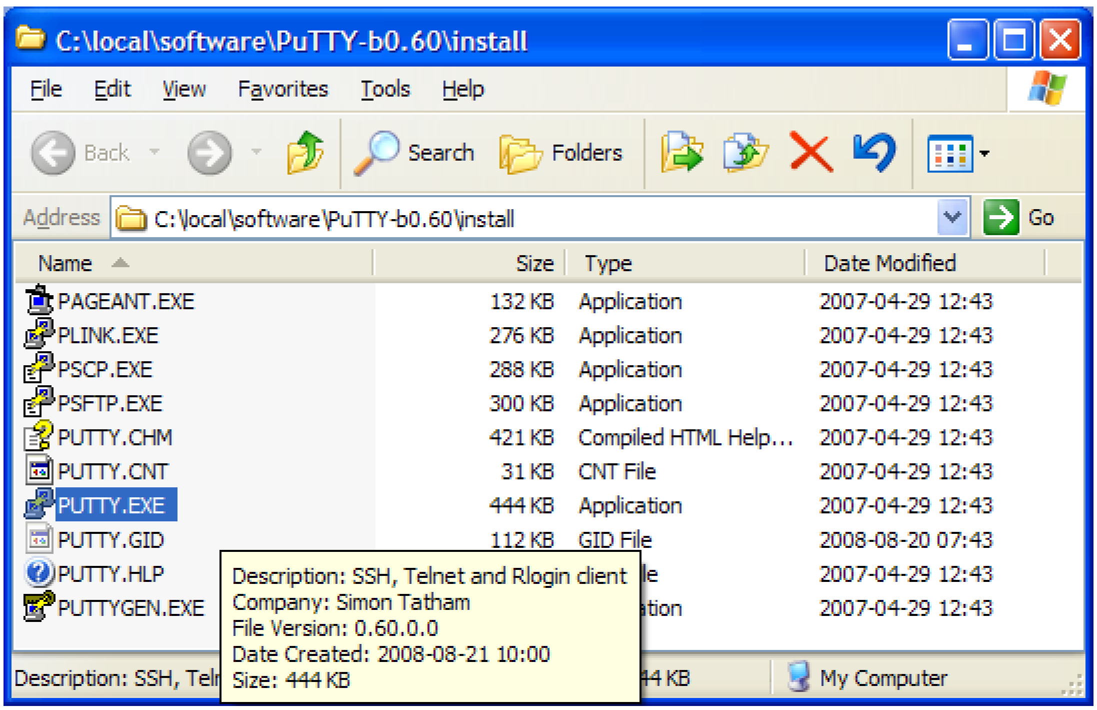
At this time the download is available on ACNS's "Download Center: Free Software" web page under "Terminal Clients" and is listed as "PuTTY SSH client (recommended for ACARD)":

http://www.acns.colostate.edu/?page=downloads_freeware

Some individuals have experienced issues when putty.zip is extracted and configured on a network share instead of a local drive. For example, a Window's dialog titled "Open File – Security Warning" may appear. The text of the dialog includes "The publisher could not be verified. Are you sure you want to run this software?" If the option to ignore this warning is available, select it and then select "Run" to start PuTTY. When installed on a network share, the dialog may not include the option to ignore this warning. For such cases, the "Run" button must be pressed each time PuTTY is executed. We are working on other solutions as well.

Run PUTTY.EXE

Open PuTTY – for example, from Windows Explorer, double-click the PUTTY.EXE icon extracted from putty.zip.



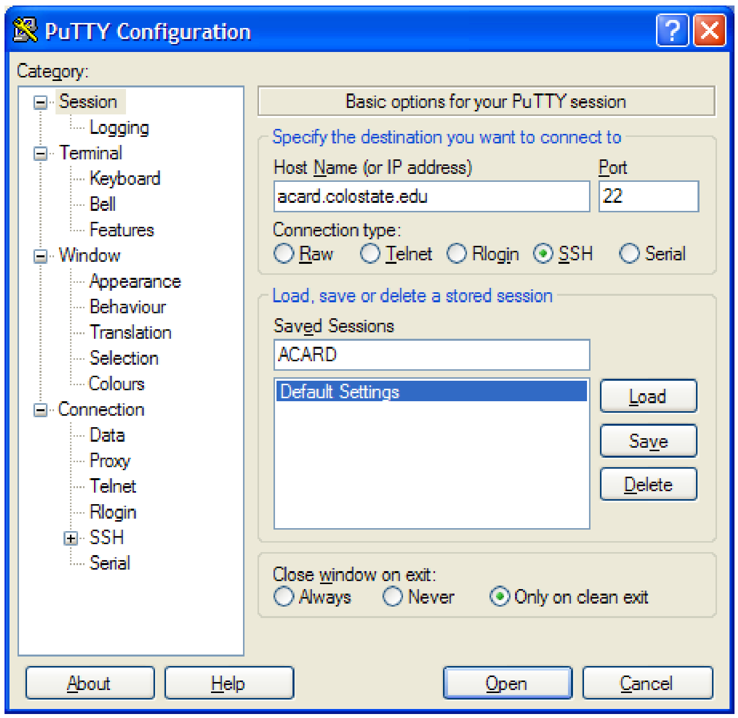
In this example, the files were extracted to "C:\local\software\PuTTY-b0.60\install"

Create the ACARD Profile

Next, create the ACARD profile. This example creates a saved session named “ACARD”.

Session Category:

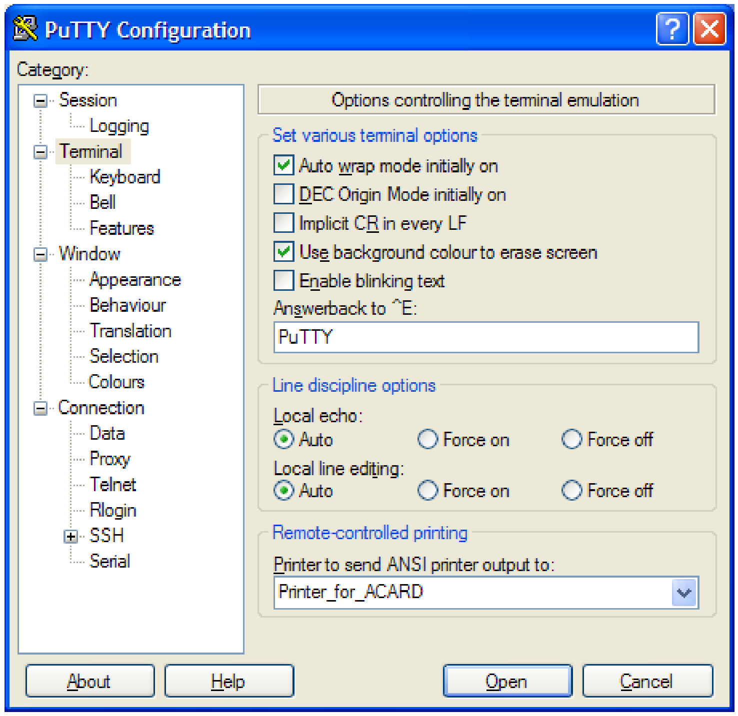
Host Name (or IP address)	:	acard.colostate.edu
Port	:	22 *[default]*
Connection type	:	SSH
Saved Sessions (top box)	:	ACARD
[Save]		



This screen was captured before pressing the [Save] button.

Terminal Category:

Printer to send ANSI printer output to : *[select desired printer*]

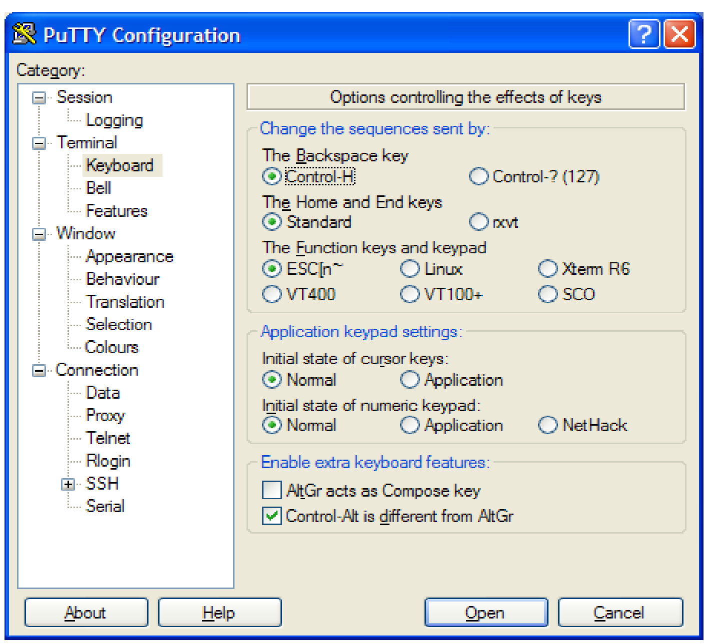


The print option within ACARD spools reports to the specified printer using the printer's default settings.

Terminal Category / Keyboard

Change the sequences sent by:

The Backspace key : Control-H



Connection Category:

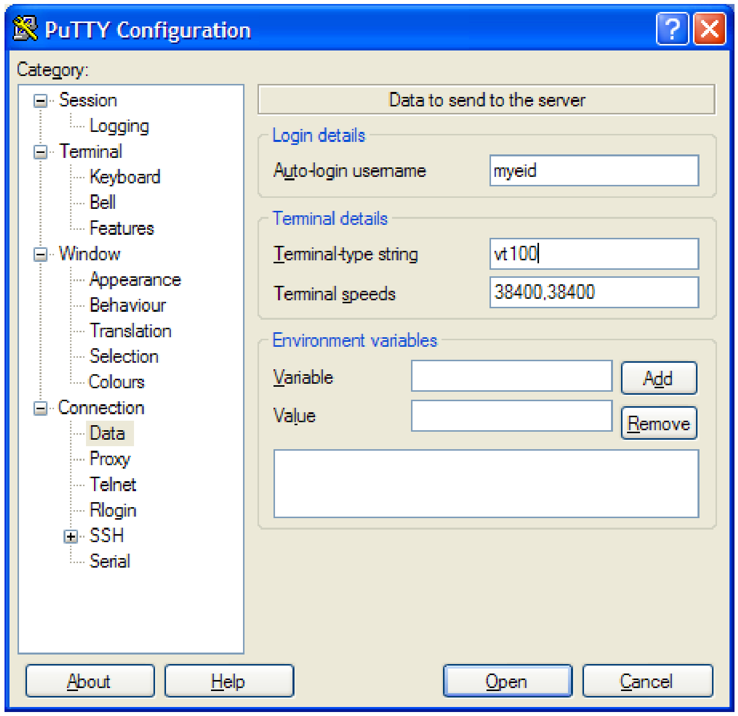
Connection Category / Data:

Login details:

Auto-login username : *[your user name]*

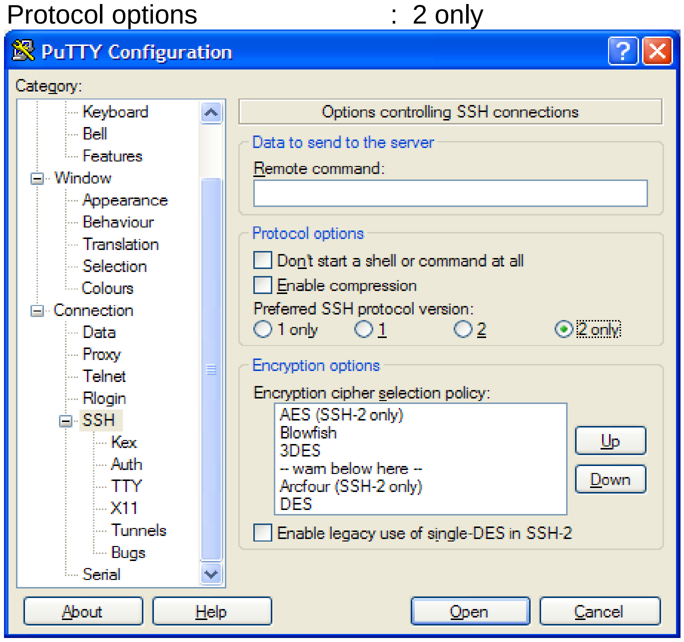
Terminal details:

Terminal-type string : vt100



Connection Category / SSH:

Protocol options : 2 only

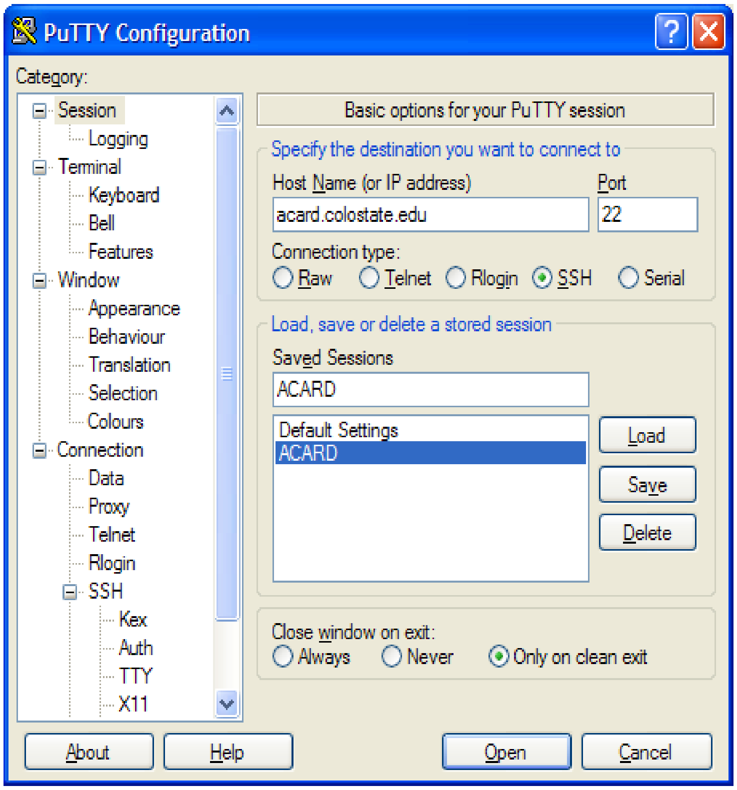


Save the ACARD Profile

Ensure the settings are saved to the profile.

Session Category:

Highlight your saved session name (e.g., ACARD)
Click the [Save] button next to the list



Other Profile Preferences

Below are a few examples of optional settings which may be adjusted to personal preferences. Please be sure to save the profile after modifications.

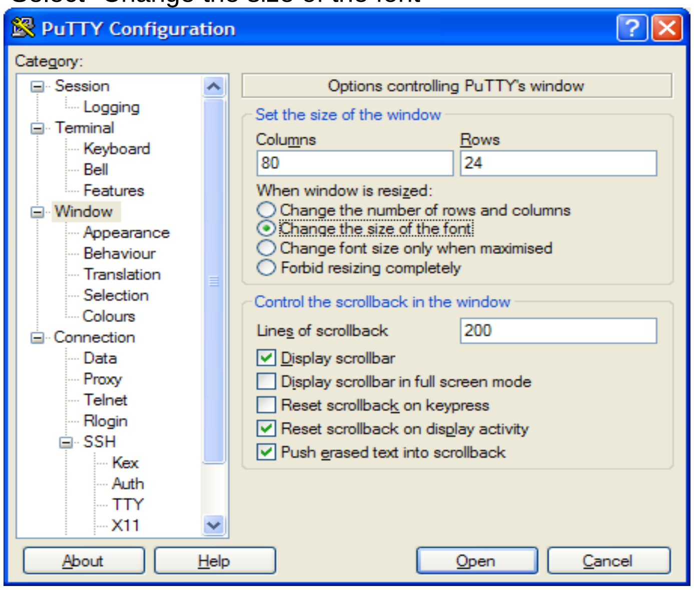
Resize Window and Font

This option changes the font size when the PuTTY window is resized

Window Category:

Set the size of the window

Select "Change the size of the font"



Change Font

Change the font and font size with this option.

Windows Category / Appearance

Font Settings

Select the [Change] button

Select the Font, Font style, and Size

Press the [OK] button in the font dialog

Change Windows Colors

Use this option to change the foreground, background, and other colors.

Window Category / Colours

For background color:

Highlight Default Background

Select the [Modify] button

Select a predefined color or a color in the graph

Press the [OK] button in the color dialog

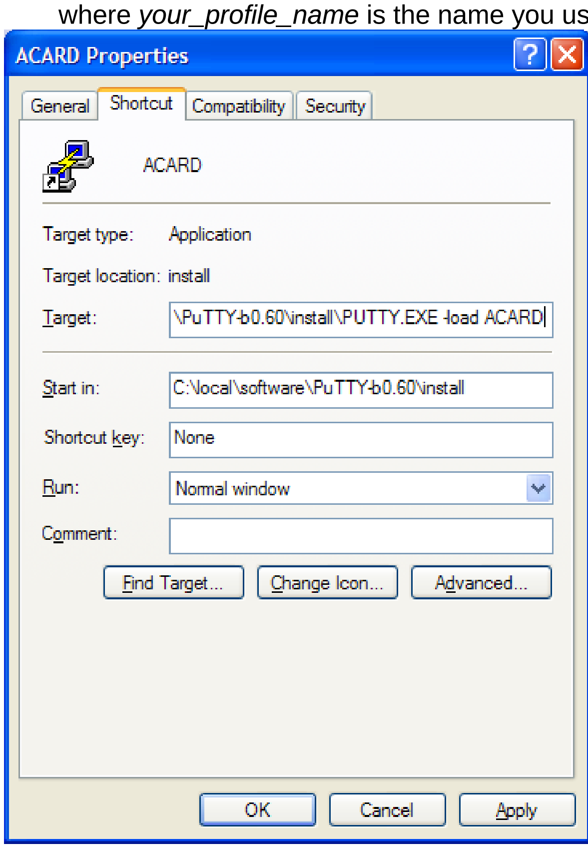
For foreground color:
Highlight Default Foreground
Select the [Modify] button
Select a predefined color or a color in the graph
Press the [OK] button in the color dialog

Create a Shortcut to Open PuTTY to the Saved Session

Right-click on PUTTY.EXE
Select *Copy*
Right-click in the desired location of the shortcut (for instance, to place on the Desktop, right-click in an exposed area of the Desktop)
Select *Paste Shortcut*

Rename the shortcut if desired
Right-click the shortcut's icon
Select *Rename*
Enter the desired name

Add the profile to the "Target":
Right-click the shortcut's icon
Select *Properties*
Append the string below to the text in the *Target* field (do not include the quotes, but do include the spaces before and after "-load"):
" -load *your_profile_name"*
where *your_profile_name* is the name you used in the Saved Session

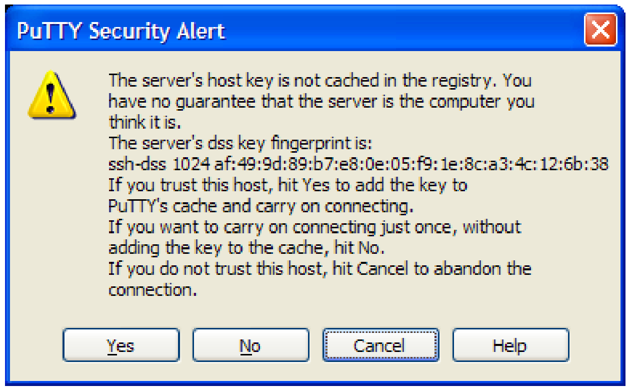


The shortcut and profile in this example are named ACARD.

Run PuTTY with the Profile

Double-Click on the shortcut's icon – ACARD in this example.

Upon the first attempt to connect to a server, PuTTY presents a security dialog indicating the server's host key is new. Please select the [Yes] button to avoid receiving this dialog each time PuTTY is executed. This dialog also appears when the server's host key changes and will appear when the ACARD application is moved to a new server.



Finally, the password prompt appears.