Instructions for completing on-line application in PeopleSoft Financials

Sign into PeopleSoft Financials and follow steps below:

Click the compass icon in the top right corner of the screen to access the Navigation Bar, or “NavBar”

Click the “Navigator” icon to open the full Navigation menu.
Click “UofL Custom”

Click “UL Procurement Card”

Click “Procurement Card Application”
Note: If you do not see this screen, make sure you are in PS Financials and not PS HR/CS

PCard applications
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Search Criteria

<table>
<thead>
<tr>
<th>Field</th>
<th>Begins with</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emp ID</td>
<td></td>
</tr>
<tr>
<td>Request Number</td>
<td></td>
</tr>
</tbody>
</table>

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value

Click Add a New Value

The pop-up window will appear:

Message

Testing must be taken prior to applying for Pcard (30003,29)

OK

Click OK if test completed.

If testing has not been completed, log out of the system and complete the testing. To register for the test, click this link: http://louisville.edu/procard/forms/blackboard-test-registration Verify with the ProCard Office that your scores have been recorded. Once testing is completed with a score of 100%, you may proceed to the next step to complete the application.
Enter the Employee ID Number of the cardholder/responsible party. Leave the Request Number blank. This will fill in automatically, once the application has been saved.

**PCard applications**

Enter your default account code

Enter Telephone Number – format as: 5028526250 (no dashes or parentheses)

3) Select Card Type – Declining balance: Only check this box if you wish to enter a maximum amount for the card’s life cycle.

**Click** and enter the required information as illustrated below:

1) Select Card Type – Department Account: Check this box if the card is being issued as a Departmental Card with the Department name appearing on the card. Make sure to enter Department Name for card.

2) Select Card Type – Individual Account: Check this box if the card is being issued as Individual card with your name appearing on the card.

Click **Save**

Note: # 3 to be used only if maximum amount is to be used. When maximum amount is used, then this card is no longer valid/useable.
When information has been entered in all fields and saved, your screen will appear as follows:

From Navigate, click on Procurement Card Approval:

**Navigate > UofL Custom > UL Procurement Card > Procurement Card Approval**

Click
Note: If application does not pull up, use Employee Id and Request #.

Enter Cardholder’s Approver(s) Employee ID

Enter Dean/Vice President Employee ID - Not req’d for School of Medicine

Enter Cardholder’s Reallocator(s) Employee ID

Enter Director/Dept Chair’s Employee ID

The ProCard Office will enter Purchasing and Send to Supplier information.

Enter the date you are entering the Application in all applicable date fields.

If the approver is also the Reallocator, add this information in both fields. If you have more than one Approver or Reallocator, you must click on the plus sign (+) in the appropriate field to add a row and additional information.

Click 💾 Save

Note: The Request No. will be needed later to print the application.

If all information is correct, you can print the application from University Reports immediately.

Note: If corrections need to be made to the saved application, go page 11 for instructions.
Instructions for printing on-line application in University Reports

Applications may be printed immediately after completing the application process in PeopleSoft.

Sign into ULINK, click on the Faculty & Staff tab, select University Reports and follow the steps below:

The following screen will appear to sign into the University Reports option:

The next screen will appear:
Click then click from the list below:
Enter cardholder’s Employee ID and the request # from the application, click **OK**
Click the icon to print your application.

The printed application should be reviewed for accuracy prior to obtaining required signatures.

- Review the information for accuracy that is populated from application in PeopleSoft.
- Print legibly the campus address on the printed application.
- If grant related, make sure the expiration date is populated on the application, otherwise the application cannot be processed. Note: The expiration date cannot be written or manually entered on the application.
- Obtain all required signatures – Cardholder, Reconciler/Reallocator, Approver, and the responsible party for the Chartfield – Director/Department Chair or Dean/Vice President.
- Review again to be sure all information is correct and forward completed application to the ProCard Office: Houchens Building – LL05.
Instructions for making corrections to saved on-line application in PeopleSoft Financials

Navigate > UofL Custom > UL Procurement Card > Procurement Card Approval

PCard Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Search Criteria

- Empl ID begins with
- Request Number begins with

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value

Enter your Employee ID and Request # and click

If you do not recall your request # go to page 13 for instructions.
Navigate > UofL Custom > UL Procurement Card > Procurement Card Approval

**PCard Approval**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value]  [Add a New Value]

**Search Criteria**

- **Emp ID** begins with: [ ]
- **Request Number** begins with: [ ]

[Search]  [Clear]  [Basic Search]  [Save Search Criteria]

**Find an Existing Value**  [Add a New Value]

**Enter your Employee ID and Request # and click**  [Find an Existing Value]

**Request Procurement Card**

<table>
<thead>
<tr>
<th>Employee ID: 3008400</th>
<th>Name: Powell, Sheryl L</th>
<th>Request No.: 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account:</strong> 541100</td>
<td><strong>Card Type:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Amount Limits:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per Trans: 2500.000</td>
<td>Monthly: 10000.000</td>
<td>Telephone: 802/852-8214</td>
</tr>
</tbody>
</table>

- Department Account
- Individual Account
- Decline Balance Card

**Existing Cards**

[Add]

**Chartfields**

- **SpeedType Key:**
- **Fund:**
- **Dept:**
- **Program:**
- **Project:**
- **Grant Exp Dt:**
- **Dept Name:** Purchasing

[Save]  [Notify]

[Credit Card Appl Approval]  [Credit Card Appl App Sign]

Make necessary changes and click  [Save]
Instructions for finding request # required in PeopleSoft Financials or University Reports

Main Menu > UofL Custom > UL Procurement Card > Procurement Card Approval

PCard Approval
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Search Criteria

Empl ID:  begins with  
Request Number:  begins with  

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value

Enter your Employee ID and click  Search

PCard Approval
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Search Criteria

Empl ID:  begins with  
Request Number:  begins with  

Search  Clear  Basic Search  Save Search Criteria

Search Results

<table>
<thead>
<tr>
<th>View All</th>
<th>First</th>
<th>1-3 of 3</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmpID</td>
<td>Name</td>
<td>Request Number</td>
<td>Card Issuer</td>
</tr>
<tr>
<td>L1</td>
<td>PNC</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>L2</td>
<td>PNC</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>L3</td>
<td>PNC</td>
<td></td>
<td>N</td>
</tr>
</tbody>
</table>

Find an Existing Value  Add a New Value

Note the last Request Number and continue with process.