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**

- **Empl ID** begins with **Request Number** begins with

*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)
```

Click **OK** if test completed.

If testing has not been completed, log out of the system and complete the testing on Blackboard – instructions **HERE**. 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**

Find an Existing Value | Add a New Value

Empl ID:  
Request Number:

Add

Find an Existing Value | Add a New Value

Click  
and enter the required information as illustrated below:

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 When maximum amount is used, then this card is no longer valid/useable.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 Director/Dept Chair’s Employee ID

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

Enter Cardholder’s Approver(s) Employee ID

Enter Cardholder’s Funding Reviewer(s) Employee ID

Enter Cardholder’s Proxy(ies) 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 Funding Reviewer, add this information in both fields. If you have more than one Approver, Funding Reviewer, or Proxy, you must click on the plus sign (+) in the appropriate field to add a row and additional information.

Click on 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 BI Reports

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

Sign into BI Reports, and then select the “FI” folder:

Within the “FI” folder, select “Listings”:

The next screen will appear, where you can select the “ProCard Application” folder:
Enter cardholder’s Employee ID and the request # from the application, click on the far-right hand side.

Once the application populates, select to save the application (PDF option available), or to print:

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, Funding Reviewer, Approver, Proxy, 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

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

Request Procurement Card

Employee ID: 3000400  Name: Powell, Sheryl L  Request No.: 3

Account: 541100  Laboratory

Card Type

Department Account
Individual Account
Decline Balance Card

Chartfields

SpeedType Key:

Fund  Dept  Program  Project  Grant Exp Dt
1000  23140000156  01044

Dept Name: Purchasing

Make necessary changes and click

Save  Notify

Credit Card Appl Approval  Credit Card Appl App Sign

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Instructions for finding request # required in PeopleSoft Financials or BI 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

<table>
<thead>
<tr>
<th>Search Criteria</th>
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<td>STARTS WITH</td>
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Enter your Employee ID and click Search

Note the last Request Number and continue with process.