

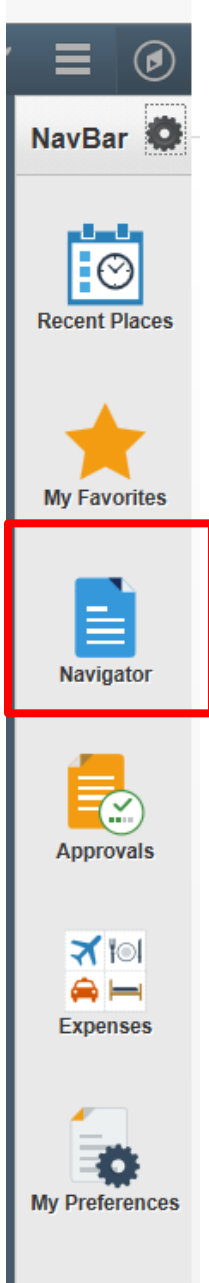
## Instructions for completing on-line application in PeopleSoft Financials

Sign into [PeopleSoft Financials](#) and follow steps below:

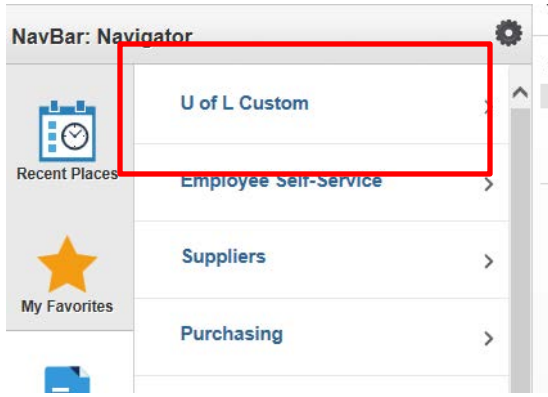
**Click the compass icon in the top right corner of the screen to access the Navigation Bar, or “NavBar”**



**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

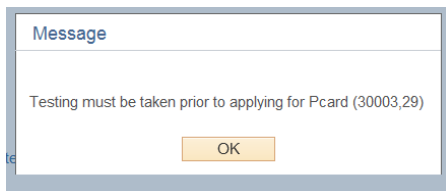
Request Number

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Click [Add a New Value](#) [Find an Existing Value](#) [Add a New Value](#)

The pop-up window will appear:



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

Empl ID:

Request Number:

Find an Existing Value | Add a New Value

Click  and enter the required information as illustrated below:

Enter your default account code

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

The screenshot shows the 'Request Procurement Card' form. It includes fields for Employee ID, Name, Request No., Account, Amount Limits (Per Trans, Monthly), Card Type (Department Account, Individual Account, Decline Balance Card), Dept Name for Card, Max Amt, Chartfields (SpeedType Key, Fund, Dept, Program, Project, Grant Exp Dt), and Dept Name. There are also 'Save' and 'Notify' buttons. A callout box points to the 'SpeedType Key' field with the instruction 'Enter Department SpeedType'.

Select Card Type –

- 1) 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) Individual Account: Check this box if the card is being issued as individual card with your name appearing on the card.
- 3) Declining Balance: Only check this box if you wish to enter a maximum amount for the card's life cycle.

Click

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:

### Request Procurement Card

Employee ID: [REDACTED] Name: [REDACTED] Request No.: 3

\*Account: 541100 Laboratory

U of L Pcard website

**Amount Limits**  
Per Trans: 2500.000  
Monthly: 10000.000  
Telephone: [REDACTED]

**Card Type**  
 Department Account  
Dept Name for Card: [REDACTED]  
 Individual Account  
 Decline Balance Card  
Max Amt: [REDACTED]

**Existing Cards**  
First Last

**Chartfields**  
SpeedType Key: 01044  
Fund Dept Program Project Grant Exp Dt  
1000 2314000156 01044  
Dept Name: Purchasing

Save Notify

From Navigate, click on Procurement Card Approval:

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

### Request Procurement Card

Employee ID: [REDACTED] Name: [REDACTED] Request No.: 3

\*Account: 541100 Laboratory

U of L Pcard website

**Amount Limits**  
Per Trans: 2500.000  
Monthly: 10000.000  
Telephone: [REDACTED]

**Card Type**  
 Department Account  
Dept Name for Card: [REDACTED]  
 Individual Account  
 Decline Balance Card  
Max Amt: [REDACTED]

**Existing Cards**  
First Last

**Chartfields**  
SpeedType Key: 01044  
Fund Dept Program Project Grant Exp Dt  
1000 2314000156 01044  
Dept Name: Purchasing

Save Notify Add

[Credit Card Appl Approval](#) | [Credit Card Appl App Sign](#)

Click

[| Credit Card Appl App Sign](#)

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

**Request Procurement Card**

Employee ID: [Redacted] Name: [Redacted] Request No.: 1

Account: 541000 U of L Pcard website

**Send to Vendor**  
 Send to Supplier

**Approved By**

Director/Dept Chair	[Redacted]	sen	05/21/2019
Dean/Vice President	[Redacted]	sen	05/21/2019
Purchasing:	[Redacted]		

**Card Approvers** Find View All First Last

[Redacted]	[Redacted]	05/21/2019
Testing	05/08/2014	

**Funding Reviewers** Find View All First Last


[Redacted]	[Redacted]	05/21/2019
Testing	12/15/2014	

**Proxy** Find View All First Last

[Redacted]	[Redacted]	05/21/2019
Testing	12/15/2014	

Annotations:

- 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 

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

**Request Procurement Card**

Employee ID: [Redacted] Name: [Redacted] Request No.: 3

Account: 541100 Laboratory U of L Pcard website

**Send to Vendor**  
 Send to Supplier

**Approved By**

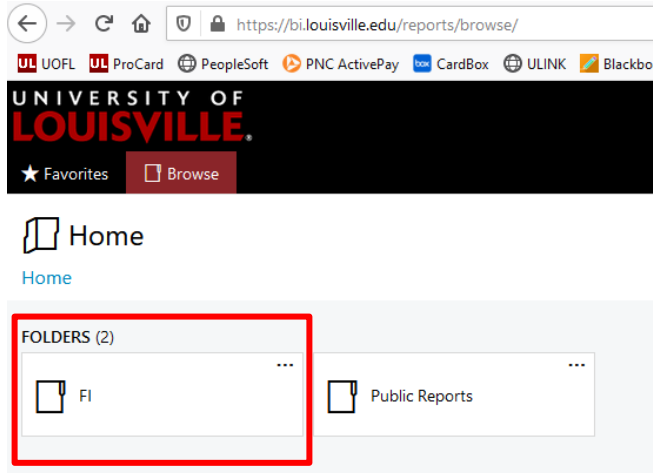
If all information is correct, you can print the application from University Reports immediately.

Note: If corrections need to be made to the saved application, go page 11 for instructions.

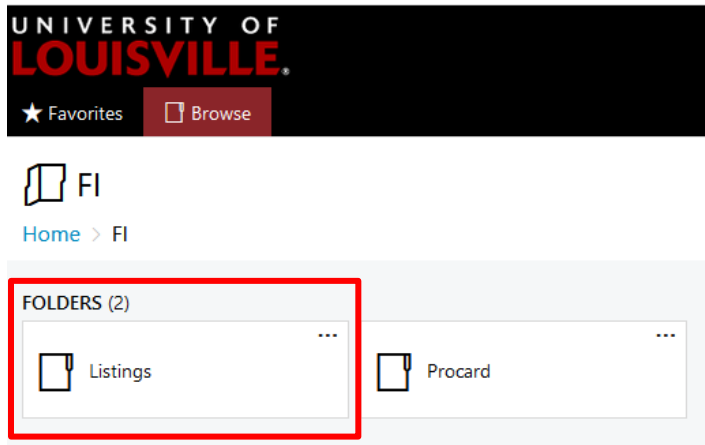
## Instructions for printing on-line application in BI Reports

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

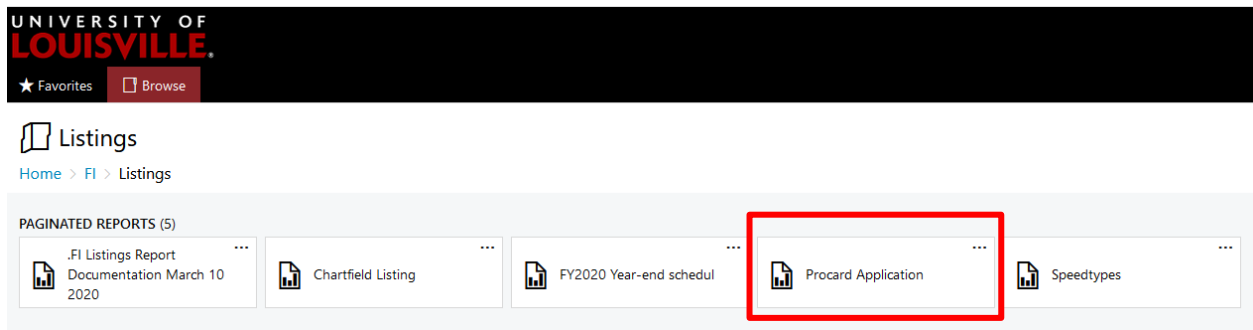
Sign into BI Reports, and then select the “FI” folder:



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





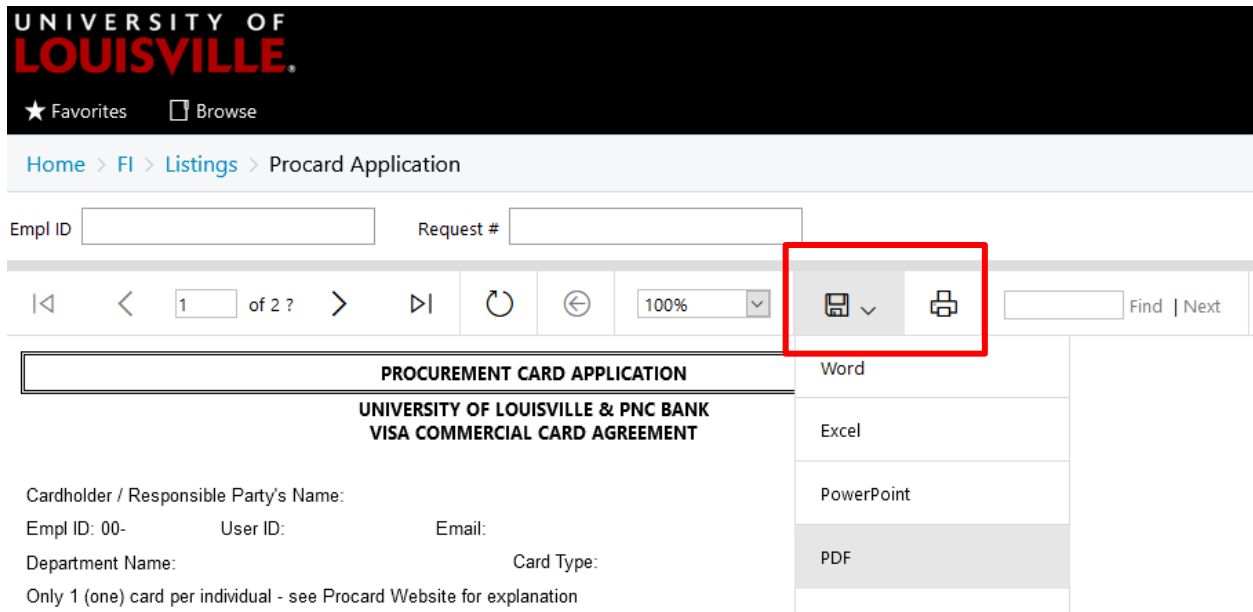
The next screen will appear, where you can select the “ProCard Application” folder:



Enter cardholder's Employee ID and the request # from the application, click on the far-right hand side.

[View Report](#)

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



UNIVERSITY OF LOUISVILLE

★ Favorites □ Browse

Home > FI > Listings > Procard Application

Empl ID  Request #

1 of 2 ? 100%

PROCUREMENT CARD APPLICATION

UNIVERSITY OF LOUISVILLE & PNC BANK  
VISA COMMERCIAL CARD AGREEMENT

Cardholder / Responsible Party's Name:  
Empl ID: 00-      User ID:      Email:  
Department Name:      Card Type:  
Only 1 (one) card per individual - see Procard Website for explanation

Word  
Excel  
PowerPoint  
PDF  
...

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

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## PCard Approval

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

---

▼ **Search Criteria**

Empl ID

Request Number

[Find an Existing Value](#) | [Add a New Value](#)

Enter your Employee ID and Request # and click [Find an Existing Value](#) |

If you do not recall your request # go to page 13 for instructions.

### 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

Request Number

[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

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

\*Account:  Laboratory

[U of L Pcard website](#)

Amount Limits		Card Type	
Per Trans:	<input type="text" value="2500.000"/>	<input checked="" type="radio"/> Department Account	
Monthly:	<input type="text" value="10000.000"/>	Dept Name for Card:	<input type="text" value=""/>
Telephone:	<input type="text" value="502/852-8214"/>	<input type="radio"/> Individual Account	
		<input type="radio"/> Decline Balance Card	
		Max Amt:	<input type="text"/>

Existing Cards				
			First	Last

Chartfields				
SpeedType Key: <input type="text" value=""/>				
Fund	Dept	Program	Project	Grant Exp Dt
1000	2314000156	01044		
Dept Name: Purchasing				

[Save](#) [Notify](#) [Add](#)

[Credit Card Appl Approval](#) | [Credit Card Appl App Sign](#)

Make necessary changes and click [Save](#)

# 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](#)

---

▼ Search Criteria

Empl ID:

Request Number:

[Search](#) [Clear](#) [Basic Search](#)

[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:

Request Number:

[Search](#) [Clear](#) [Basic Search](#)

### Search Results

View All First  1-3 of 3  Last

Empl ID	Name	Request Number	Card Issuer	Plan Processed	Flag	Send to Supplier
[REDACTED]	[REDACTED]	1	PNC			N
[REDACTED]	[REDACTED]	2	PNC			N
[REDACTED]	[REDACTED]	3	PNC			N

[Find an Existing Value](#) | [Add a New Value](#)

Note the last Request Number and continue with process.