

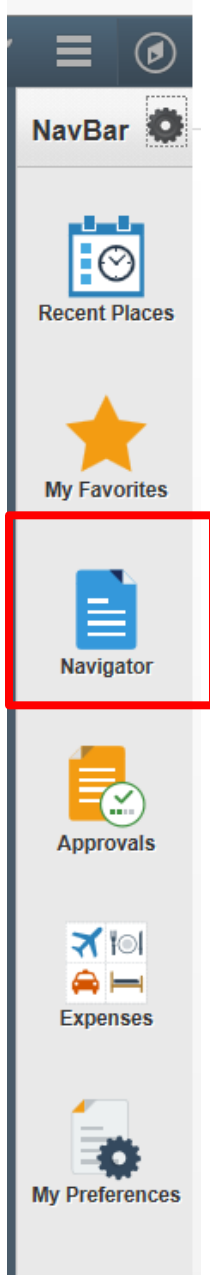
Instructions for completing on-line application in PeopleSoft Financials

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

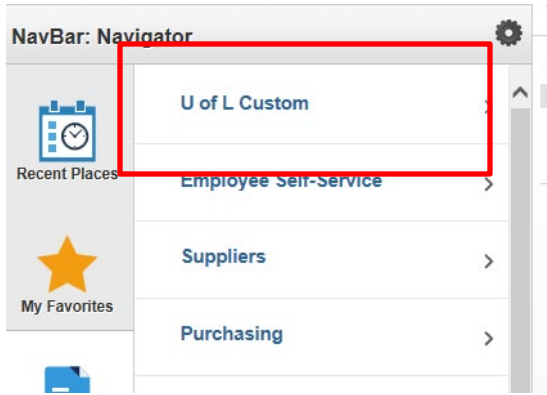
Click the compass icon in the top right corner of the screen to access the Navigation Bar, or “NavBar”



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

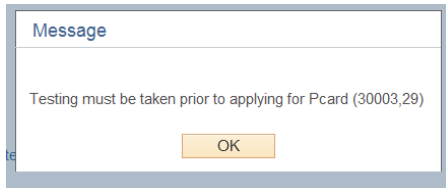
Request Number

[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)

Request Procurement Card

Employee ID: Name: Request No.: NEW

Account:

Amount Limits

Per Trans:
Monthly:
Telephone:

Card Type

Department Account
 Individual Account
 Decline Balance Card

Dept Name for Card:

Max Amt:

U of L Pcard website

Existing Cards

	First	Last
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Chartfields

SpeedType Key:

Fund	Dept	Program	Project	Grant Exp Dt
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Dept Name:

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:
 Individual Account
 Decline Balance Card
Max Amt:

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:
 Individual Account
 Decline Balance Card
Max Amt:

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 [1] Last

[redacted]	[redacted]	05/21/2019	[+]
Testing	05/08/2014		


Funding Reviewers Find View All First [1] Last

[redacted]	[redacted]	05/21/2019	[+]
Testing	12/15/2014		

Proxy Find View All First [1] Last

[redacted]	[redacted]	05/21/2019	[+]
Testing	12/15/2014		

Annotations:
- Enter Director/Dept Chair's Employee ID (points to Director/Dept Chair field)
- Enter Dean/Vice President Employee ID - Not req'd for School of Medicine (points to Dean/Vice President field)
- Enter Cardholder's Approver(s) Employee ID (points to Card Approvers table)
- Enter Cardholder's Funding Reviewer(s) Employee ID (points to Funding Reviewers table)
- Enter Cardholder's Proxy(ies) Employee ID (points to Proxy table)
- The ProCard Office will enter Purchasing and Send to Supplier information. (points to Send to Supplier checkbox)
- Enter the date you are entering the Application in all applicable date fields. (points to date fields in all tables)

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

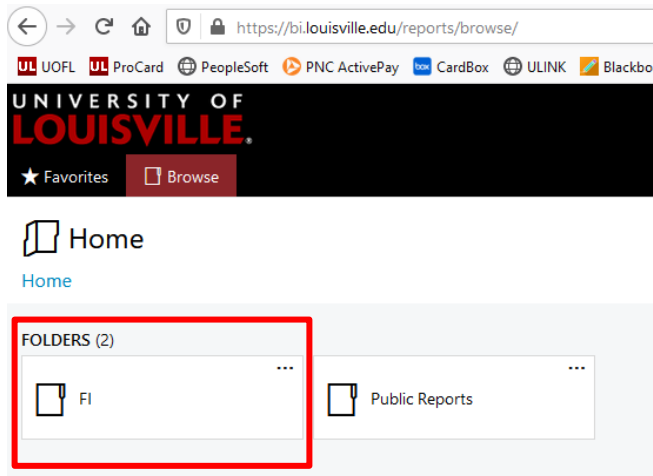
If all information is correct, you can print the application from University Reports immediately.

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

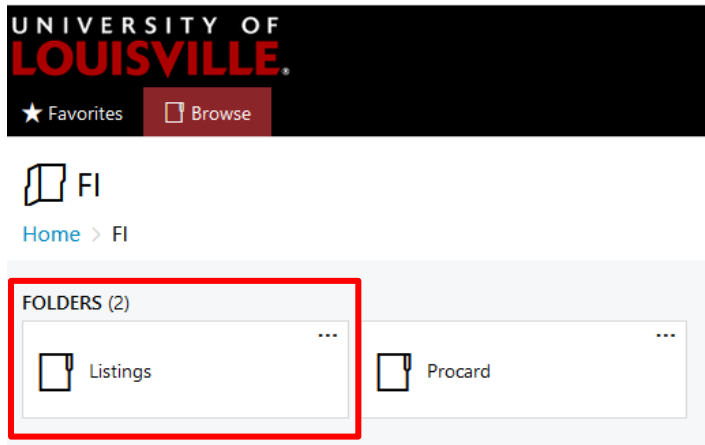
Instructions for printing on-line application in BI Reports

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

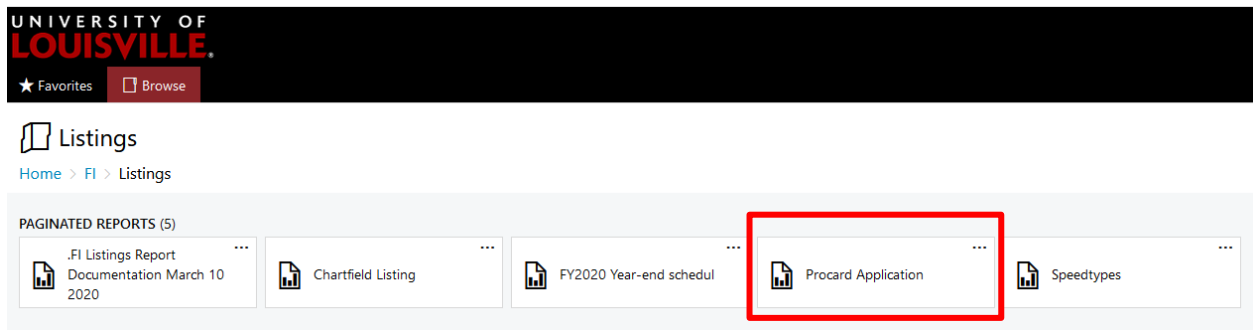
Sign into BI Reports, and then select the “FI” folder:



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





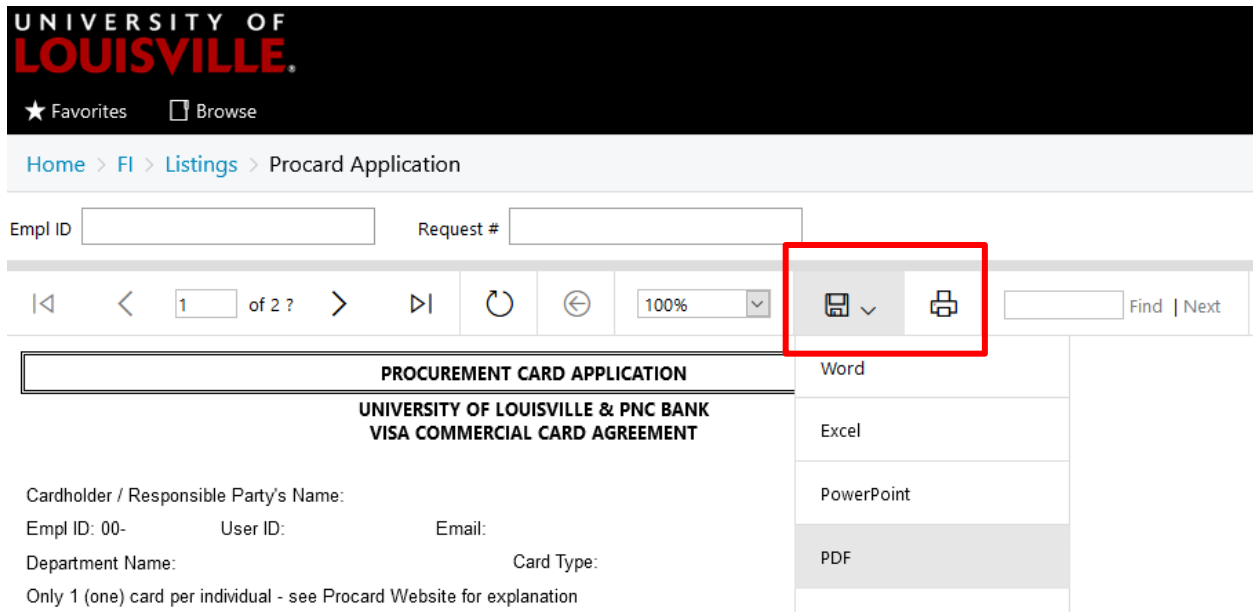
The next screen will appear, where you can select the “ProCard Application” folder:



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%

Save Print

PROCUREMENT CARD APPLICATION	
UNIVERSITY OF LOUISVILLE & PNC BANK VISA COMMERCIAL CARD AGREEMENT	
Cardholder / Responsible Party's Name:	Word
Empl ID: 00- User ID: Email:	Excel
Department Name: Card Type:	PowerPoint
Only 1 (one) card per individual - see Procard Website for explanation	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 via campus mail to the ProCard Office (Houchens Building – LL05) or by email to ProCard@louisville.edu.

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 [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
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*Account: Laboratory

[U of L Pcard website](#)

Amount Limits	Card Type	Existing Cards						
Per Trans: <input type="text" value="2500.000"/>	<input checked="" type="radio"/> Department Account	<table border="1"><thead><tr><th></th><th>First</th><th>Last</th></tr></thead><tbody><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></tbody></table>		First	Last	<input type="text"/>	<input type="text"/>	<input type="text"/>
	First	Last						
<input type="text"/>	<input type="text"/>	<input type="text"/>						
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"/>							

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]		1	PNC			N
[REDACTED]		2	PNC			N
[REDACTED]		3	PNC			N

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

Note the last Request Number and continue with process.