

## CREATING A P-CARD IN PEOPLESOFT

**Creating a P-card: BC CUSTOM MENU IN PEOPLESOFT (Please note: The P-1 must approve all new cardholders. Cardholders will be procuring goods and services for the department.)**

P-Cards can take an average of 2 weeks for established chartstrings and 3 weeks for new chartstrings.

Please note: Due to security settings, the Departmental P-card Administrator will not be able to create a card under his/her name. This must be done by another administrator, the P-1, or Procurement.

### **BC CUSTOM>PCARD>BC PCARD HOLDER UPDATE>ADD A NEW VALUE**

- **To create a cardholder, enter the chartstring and employee information.**
- **The word “eagle” must be filled in under the Business Unit and the usage code is left blank as this only pertains to special ghost accounts.**

#### BC\_PCARD\_HLD\_DISPL

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Business Unit:  

Department:  

Fund Code:  

Funding Source:  

Program Code:  

Project/Grant:  

Property:  

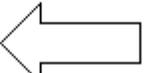
Function:  

Account:

EmplID:  

Name:

Usage Code:



- **Enter “Add” and the following box appears.**
- **Card limits of a particular cardholder may also be done in the application. The University standard is 4999.00 per individual transaction (or 999.00 for grants) and 20,000.00 per month. If necessary, change the individual limit to a lower amount but**

*not to exceed 4999.00 (it will default back to 4999.00 if the limit entered is higher). The monthly limits may be increased or decreased depending on the departmental budget or needs as the year progresses.*

*Please note: These limits are NOT the funds available. Funds available are from the budget set up in the p-card account minus what has been spent against that account.*

PCard Holder

ID: 66690990 McClay, Cecilia A

GL Acct: 68370 Dept: 022601 Procurement Services

Fund: 100 Program: 00000

Card Type  
 Plastic  Ghost Usage:

Card Status  
 Active  Inactive/Cancel Acct  Check to Send to Bank

\*\* IF LOST/STOLEN CONTACT PURCHASING IMMEDIATELY \*\*

Monthly Card Limit: 5000  Check to sent to bank

Trans Limit: 4999  Check to sent to bank

Card Text: 022601-00000-PROSVC May be edited to distinguish cards

change card text

01/13/2009 Request Sent: 03/11/2010 Co.# Update:

Date of last update: 12/12/2011 User ID: MCCLAYCE

- *Changes can be made in the “card text” field. If one person has multiple cards, name it differently to differentiate between cards. IE: 11047 AFT or OPERATING.*
- *Before entering save, please make sure the CHECK TO SEND TO BANK is checked.*
- *Enter “SAVE”*
- *The application will now go to the bank via e-mail. To verify that the application was successful, go to:*

**BC CUSTOM MENU IN PEOPLESOFT>BC CUSTOM>PCARD>BC PCARD HOLDER UPDATE>FIND AN EXISTING VALUE**