



Creating P-Card Requisitions

A P-Card can be added to the requisition as the payment method.

If a requester is a proxy for a procurement card, the **Card Number** dropdown will appear displaying all P-Cards associated with the requester.

A P-Card can be picked from the **Card Number** dropdown. When a P-Card is selected, the card's expiration date appears in the **Card Expiration** field on the requisition, and the **Use Procurement Card** checkbox is selected.

The P-Card selection can be reviewed on the Checkout - Review and Submit page.

Procedure

After completing this topic, you will be able to create a requisition using a P-Card.

Navigation:



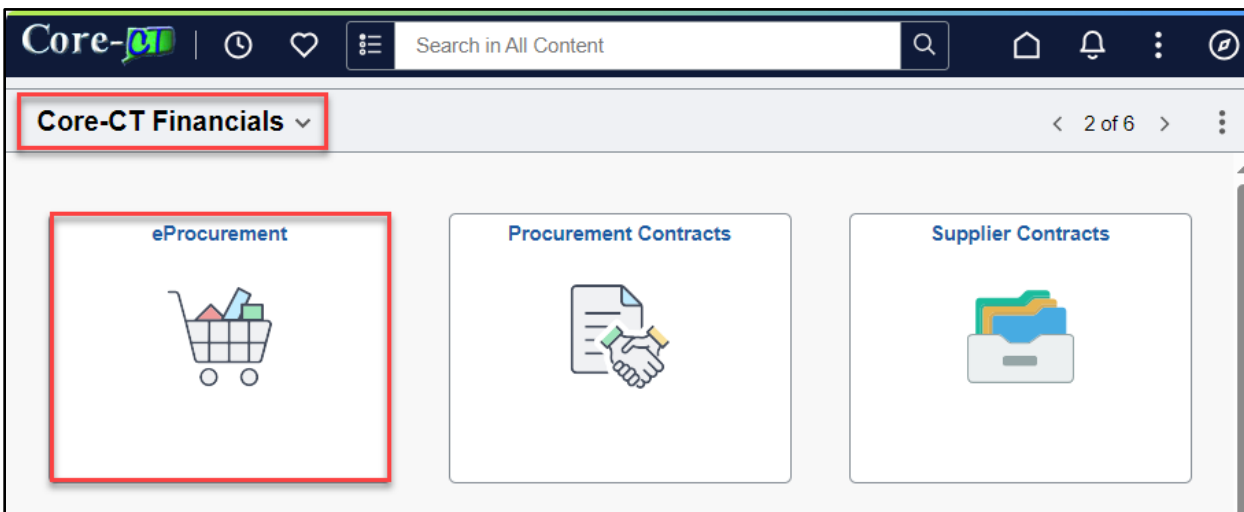
NavBar > Core-CT Financials > eProcurement > Create Requisition

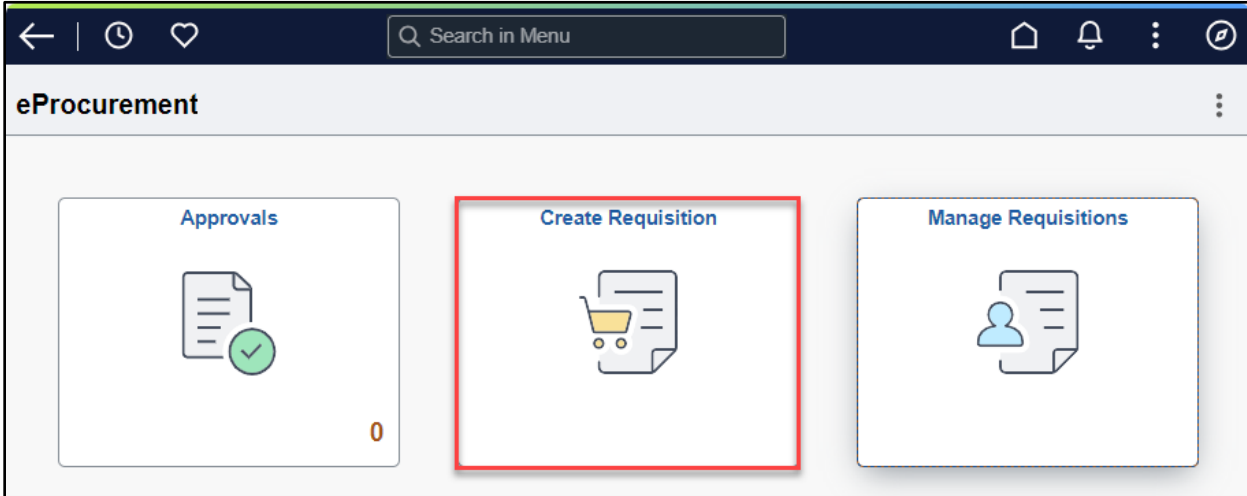
OR

Select **Core-CT Financials**

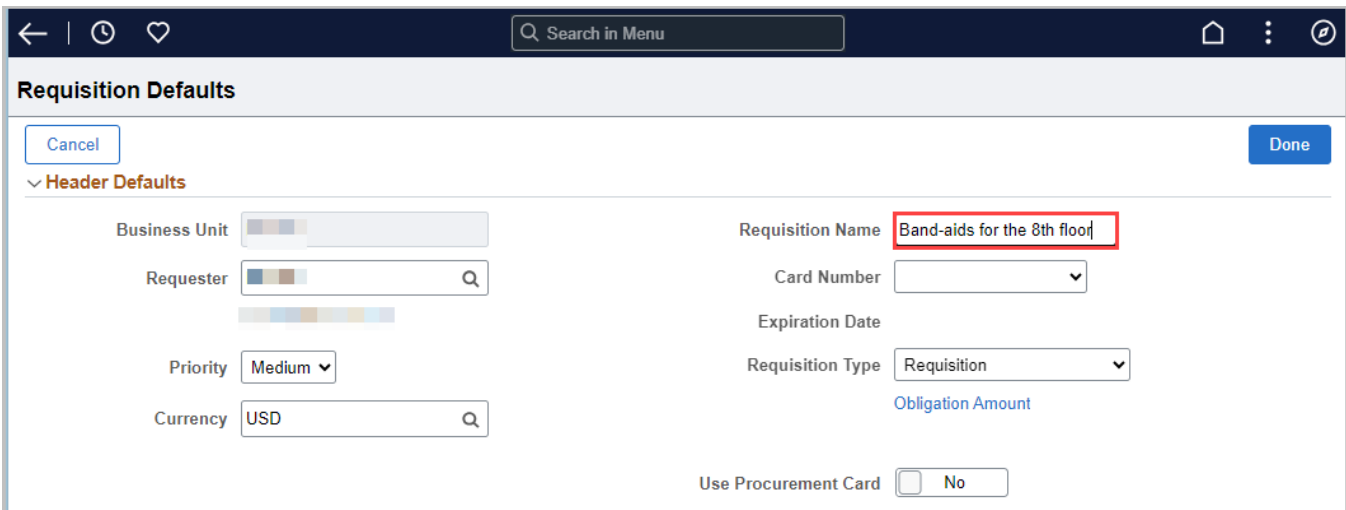
Click **eProcurement** Tile

Click **Create Requisition** Tile





Step	Action
1.	The Create Requisition page is displayed and defaults to the requester’s purchasing business unit and the requester ID for the requisition. The page also provides fields to enter line defaults, shipping defaults, and distribution defaults for the requisition.
2.	Enter a name for the requisition in the Requisition Name field. If a name is not entered, then the system-generated Requisition ID is defaulted.





Step	Action
3.	If the Requester is a proxy to a procurement card, then the Card Number dropdown, Expiration Date field, and Use Procurement Card toggle are displayed. If not, the fields are not displayed.

The screenshot shows the 'Requisition Defaults' form. The 'Card Number' dropdown, 'Expiration Date' field, and 'Use Procurement Card' toggle are highlighted with red boxes. The 'Requisition Name' field contains 'Band-aids for the 8th floor'. Other fields include Business Unit, Requester, Priority (Medium), and Currency (USD).

Step	Action
4.	Use the Card Number dropdown to select a P-Card to add to the requisition. Click the Card Number dropdown list.
5.	Click the Card Number P-Card. (All cards the Requestor is assigned as a proxy will display)

Card Number

***** (MC)



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Requisition Defaults


Cancel Done

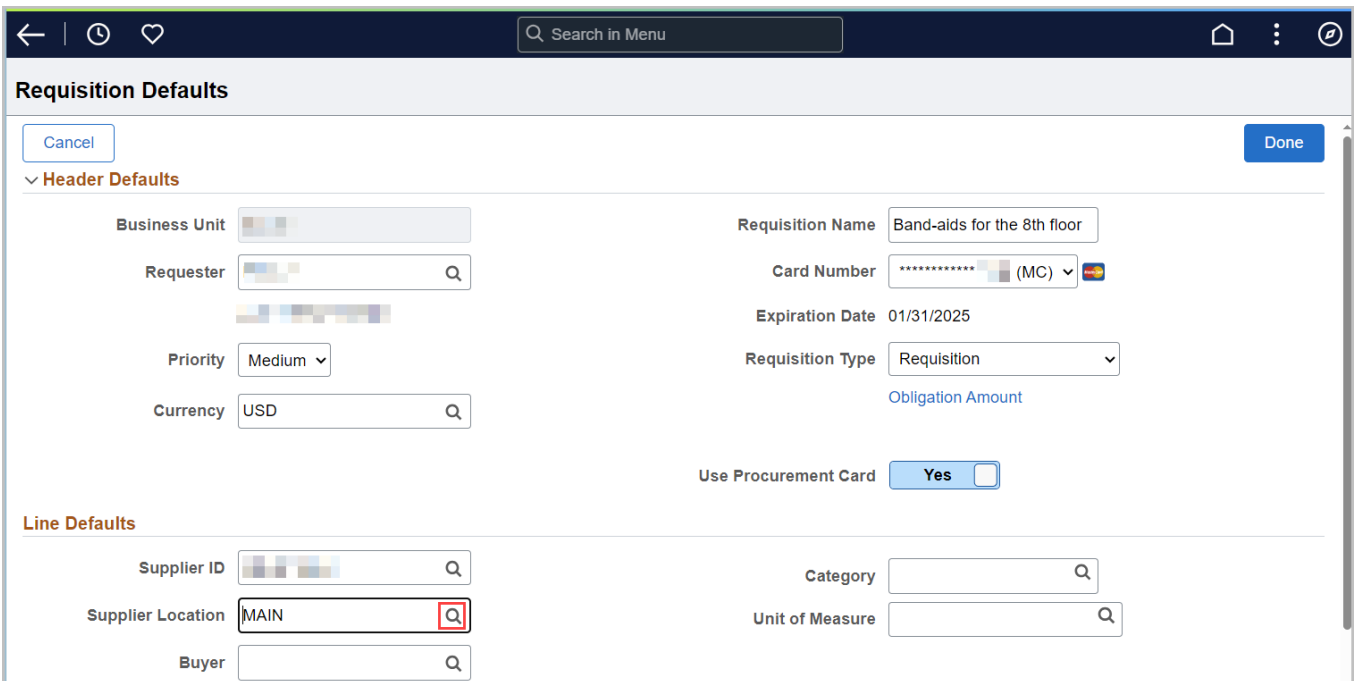
▼ Header Defaults

Business Unit	<input type="text"/>	Requisition Name	Band-aids for the 8th floor
Requester	<input type="text"/> 🔍	Card Number	***** (MC) ▼
Priority	Medium ▼	Expiration Date	***** (MC)
Currency	USD 🔍	Requisition Type	***** (MC) ▼

Commitment Amount




Step	Action
6.	When a P-Card is selected, the Use Procurement Card updates to Yes.
7.	Enter or search for a Supplier ID field.
8.	Click on the Supplier Location search icon. 



Requisition Defaults


Cancel Done

Header Defaults

Business Unit [Redacted] Requisition Name Band-aids for the 8th floor
 Requester [Redacted] Card Number ***** (MC) 
 Priority Medium Expiration Date 01/31/2025
 Currency USD Requisition Type Requisition
 Obligation Amount

Use Procurement Card Yes

Line Defaults

Supplier ID [Redacted] Category [Redacted]
 Supplier Location MAIN  Unit of Measure [Redacted]
 Buyer [Redacted]



Step	Action
9.	<p>The Supplier Location Search Results will display. Suppliers may be set up with up to 3 additional locations, all of which will accept P-Cards:</p> <ol style="list-style-type: none"> 1. PCARDPOS (PO Dispatch = Print) Swipe purchases that need to be reconciled. A requisition will be created for something already purchased. The PO will not get dispatched to the Supplier. It is for reconciliation purposes. 2. PCARDOPTIN (PO dispatch will match MAIN) A requisition will be created with this location if it is being paid for with a P-Card. 3. PUNCHOUT (PO dispatch = EDX) This location will be defaulted for Punch-Out requisitions that are being paid for with a P-Card. <p>The MAIN and MAIN-ACH locations will not accept P-Cards</p>

If the supplier does accept p-cards, but the location does not display, please complete a vendor request form and OSC/APD will update the supplier.

NOTE: Depending on the Supplier, the available locations may vary.

Step	Action
10.	When using a P-Card, the Supplier Location should be updated to either PCARDOPTIN or PCARDPOS.

Cancel

Lookup

Search for: Supplier Location

▼ **Search Results**

Grid
List

2 rows

Supplier Location ↑↓	Description ↑↓
MAIN	ORDER & REMIT-ACH
PCARDPOS	POS PCARD Reconciliation Only



Requisition Defaults

Cancel Done

▼ **Header Defaults**

Business Unit [Redacted] Requisition Name Band-aids for the 8th floor

Requester [Redacted] Q Card Number ***** [Redacted] (MC)

Expiration Date 01/31/2025

Priority Medium ▼ Requisition Type Requisition ▼

Currency USD Q [Obligation Amount](#)

Use Procurement Card Yes

Line Defaults

Supplier ID [Redacted] Q Category [Redacted] Q

Supplier Location PCARDPOS Q

Buyer [Redacted] Q

Unit of Measure [Redacted] Q

Step	Action
11.	Enter or search for a Buyer for the requisition. This is a required field.

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🔍 Search in Menu

Requisition Defaults

Cancel Done

▼ **Header Defaults**

Business Unit [Redacted] Requisition Name Band-aids for the 8th floor

Requester [Redacted] Q Card Number ***** [Redacted] (MC)

Expiration Date 01/31/2025

Priority Medium ▼ Requisition Type Requisition ▼

Currency USD Q [Obligation Amount](#)

Use Procurement Card Yes

Line Defaults

Supplier ID [Redacted] Q Category [Redacted] Q

Supplier Location PCARDPOS Q

Buyer [Redacted] Q

Unit of Measure [Redacted] Q



Step	Action
12.	The Distribution Line section is used to enter the chartfield accounting information, Inventory business unit, or Asset Information. Click the Show All tab.

Requisition Defaults

Use Procurement Card Yes

Line Defaults

Supplier ID

Supplier Location

Buyer

Category

Unit of Measure

Shipping Defaults

Ship To

Attention

Due Date

Distribution Defaults

SpeedChart

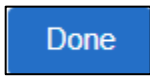
1 row

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information | **Show All**

Distribution Line	Percent	Location	GL Unit	Account
1	100	ACORE <input type="button" value="Q"/>	STATE <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/> <input type="button" value="+"/> <input type="button" value="-"/>



Step	Action
13.	Enter the Distribution Values
14.	Use the Horizontal Scrollbar to view additional fields.
15	Once all fields have been populated, scroll to the top and click the Done button.



Distribution Defaults

SpeedChart

Chartfields1 Chartfields2 Chartfields3 Details Asset Information **Show All**

GL Unit	Account	Fund	Dept	SID	Program	Bud Ref
STATE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Step	Action
16.	You will be returned to the Create Requisition page to continue with adding items or services to the requisition.



Step	Action
17.	Continue with the Requisition as normal. Refer to the Requisition jobs aids for detailed steps.
18.	The Checkout page will display the card selected. It can be modified by selecting a different card number or removed by clicking on the Use Procurement Card.

Step	Action
18.	End of Procedure.