

PCard

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P-Card Proxy Maintenance



The Cardholder Profile displays information about the Cardholder and the P-Card.

The Cardholder Profile can be used to add proxies to the card as well as update the default distribution.

The MCCG Codes, the credit limits, and the transaction limits can also be viewed. Any updates that need to be made to these fields need to be submitted through a Change Request.

Procedure

After completing this topic, you will be able to update the cardholder profile.

Navigation: Main Menu > Core-CT Financials > Purchasing > Procurement Cards > Definitions > Cardholder Profile

Favorites > Main Menu > Purchasing > Procurement Cards > Definitions > Cardholder Profile

ORACLE

All Search >> Advanced Search Last Search Results

Cardholder Profile

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

Find an Existing Value

Search Criteria

Employee ID begins with

Name begins with

Last Name begins with

Name on Card begins with

Card Number begins with

Address Line 1 begins with

City begins with

State begins with

Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

Step	Action
1.	<p>Enter the available search information</p> <p>Search Tips</p> <p>Use the drop down options for different search options (Contains)</p> <p>If searching by the card number only enter in the last four digits.</p> <p>Name on Card is helpful for searching department cards</p> <p>Multiple criteria may be used</p>

[Favorites](#) > [Main Menu](#) > [Purchasing](#) > [Procurement Cards](#) > [Definitions](#) > [Cardholder Profile](#)

[Advanced Search](#) [Last Search Results](#)

Cardholder Profile

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

[Find an Existing Value](#)

Search Criteria

Employee ID

Name

Last Name

Name on Card

Card Number

Address Line 1

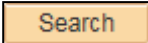
City

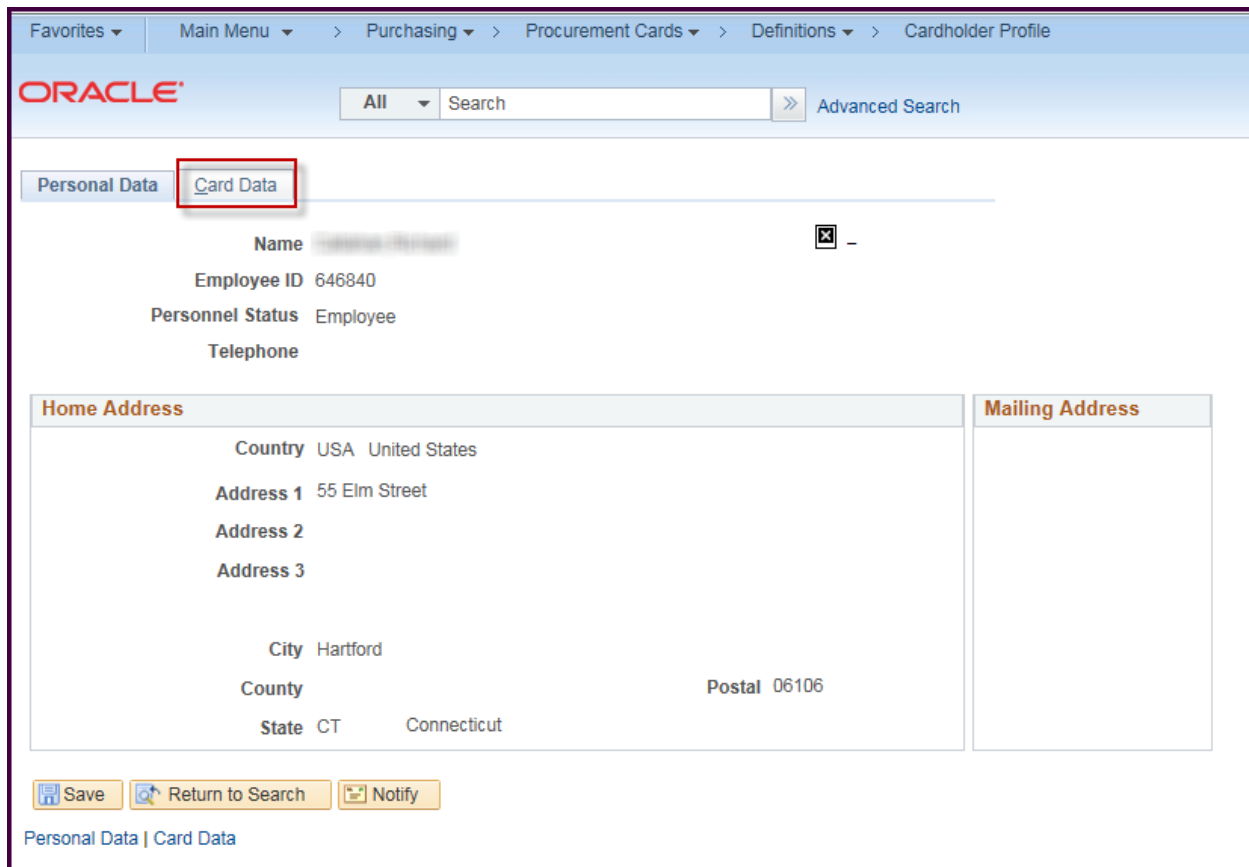
State

Case Sensitive

Limit the number of results to (up to 300):

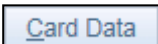
[Basic Search](#) [Save Search Criteria](#)

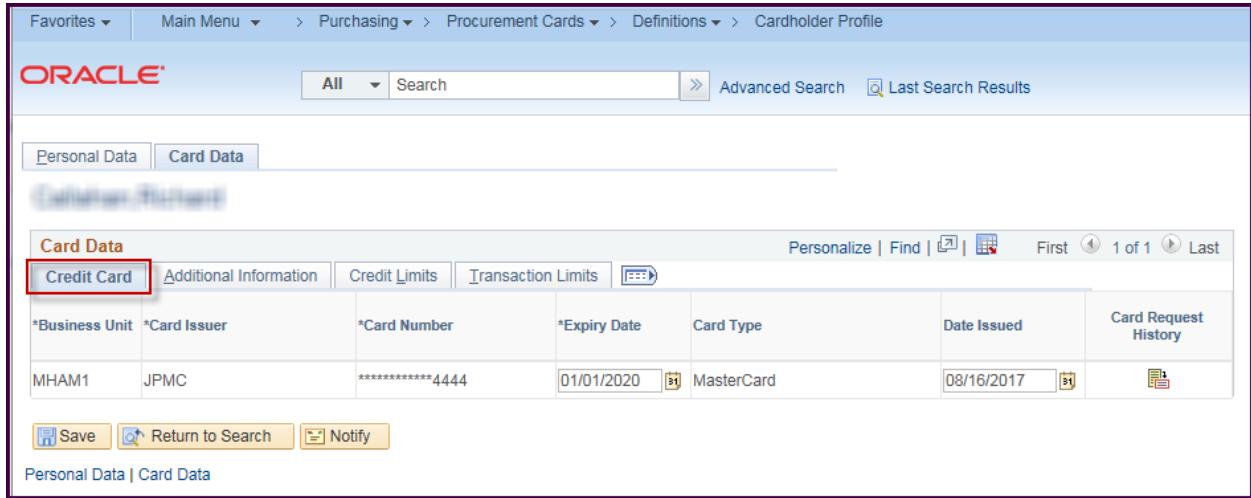
Step	Action
2.	Click the Search button. 



The screenshot shows the Oracle Cardholder Profile page. The breadcrumb trail is: Favorites > Main Menu > Purchasing > Procurement Cards > Definitions > Cardholder Profile. The Oracle logo is in the top left. A search bar contains 'All' and 'Search', with an 'Advanced Search' link. Below the search bar are two tabs: 'Personal Data' and 'Card Data'. The 'Card Data' tab is highlighted with a red box. The 'Personal Data' section displays the following information: Name (redacted), Employee ID 646840, Personnel Status Employee, and Telephone (redacted). Below this are two address sections: 'Home Address' and 'Mailing Address'. The 'Home Address' section shows: Country USA United States, Address 1 55 Elm Street, Address 2, Address 3, City Hartford, County, Postal 06106, State CT Connecticut. At the bottom of the 'Personal Data' section are three buttons: 'Save', 'Return to Search', and 'Notify'. At the very bottom, there are links for 'Personal Data' and 'Card Data'.

Step	Action
3.	The Personal Data tab displays the personal information of the Cardholder This information is pulled directly from HR.

Step	Action
4.	Click the Card Data tab. 



Step	Action
5.	<p>The Card Data tab is where information can be viewed and updated about the P-Card associated with the cardholder profile including proxies, distributions and credit/transaction limits.</p> <p>The Credit Card Tab will display all the cards associated to the cardholder along with the expiration date and Date Issued.</p>

Adding a Proxy by Card

Each card is assigned to a cardholder. A proxy is a user that has been assigned to take action within CORECT for a procurement card. A cardholder is not an automatic proxy for their own card. The individual must also be assigned a proxy role.

The actions the users can take are based upon the role assigned.

Currently there are 10 primary roles in CORECT that are used for creating and processing transactions.

All roles have access to view transaction information and run reports for any card to which they are assigned.

Below is an overview of the abilities each role has within the procurement card process.

Requester Multi Requester TSR Requester	Enter Requisitions using a P-Card Review and add comments to a staged transaction
General Buyer Program Buyer	Enter Requisitions using a P-Card (If also a requester) Enter Purchase Orders using a P-Card Review and add comments to a staged transaction
Voucher Processor Voucher Approver	Review Transactions
P-Card Reconciler	Enter Requisitions using a P-Card (If also a requester) Enter Purchase Orders using a P-Card (If also a buyer) Reconcile Staged and Verified transactions Modify transactions in error
P-Card Coordinator	Enter Requisitions using a P-Card (If also a requester) Enter Purchase Orders using a P-Card (If also a buyer) Reconcile Staged and Verified transactions Modify transactions in error Add/Modify Proxy Information Add/Modify Cardholder Information
P-Card Approver	Enter Requisitions using a P-Card (If also a requester) Enter Purchase Orders using a P-Card (If also a buyer) Approve verified transactions Modify transaction in error

CORECT recommends that when assigning proxies there is at least two reconcilers (one could be a coordinator) and two approvers on every p-card to allow for absences, vacations etc.

Step	Action
6.	<p>Proxies can be added/changed/removed through the Additional information tab.</p> <p>Click the Additional Information tab.</p> <p>Additional Information</p>

The screenshot shows the Oracle PCard Cardholder Profile page. The breadcrumb trail is: Favorites > Main Menu > Purchasing > Procurement Cards > Definitions > Cardholder Profile. The page has tabs for 'Personal Data' and 'Card Data'. Under 'Card Data', there are sub-tabs: 'Credit Card', 'Additional Information' (highlighted with a red box), 'Credit Limits', and 'Transaction Limits'. Below the tabs is a table with the following data:

*Business Unit	*Card Issuer	*Card Number	Proxies	Default Distrib	MCCG Codes
MHAM1	JPMC	*****4444	Proxies	Default Distrib	MCCG Codes


At the bottom of the table, there are buttons for 'Save', 'Return to Search', and 'Notify'. The page also includes a search bar at the top and navigation controls like 'Personalize', 'Find', and 'First 1 of 1 Last'.

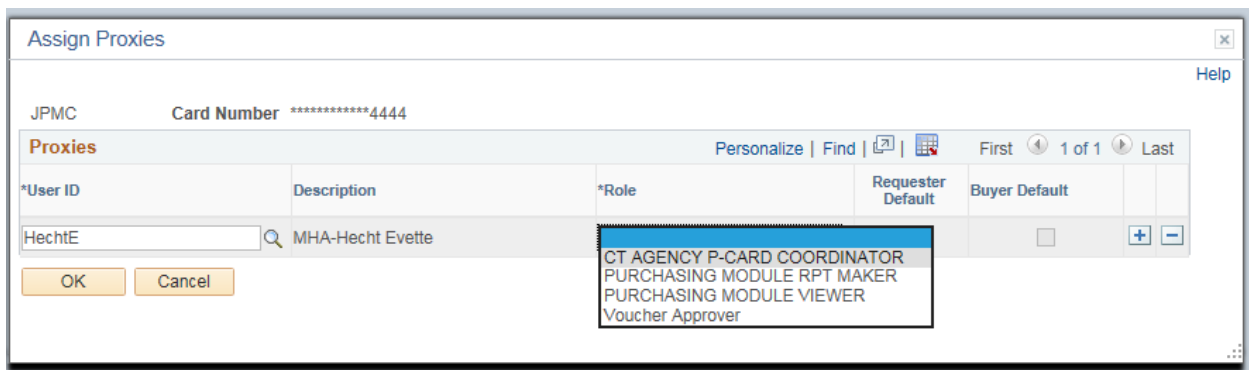
Step	Action
7.	<p>Click the Proxies link.</p> <p>Proxies</p>

If this is a new cardholder, no proxies will be associated.

Step	Action
8.	Enter the CORE User ID of the proxy that is being added to the P-Card. If the ID is unknown click the magnifying glass to search by the Name


Once you have a valid Id, the Description will populate

Step	Action
9.	<p>Use the Role dropdown to assign the proxy a role associated with the P-Card.</p> <p>The roles available for each proxy are determined by the proxy's security settings. If the user does not have the correct role, work with your agency's Security Liaison to update the user.</p> <p>Click the Role dropdown.</p> 

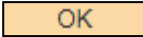


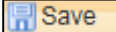
Step	Action
10.	Click the role the user will have for this card

NOTE: At this time the Requester Default and Buyer Default check boxes are not being used. DO NOT check either one.

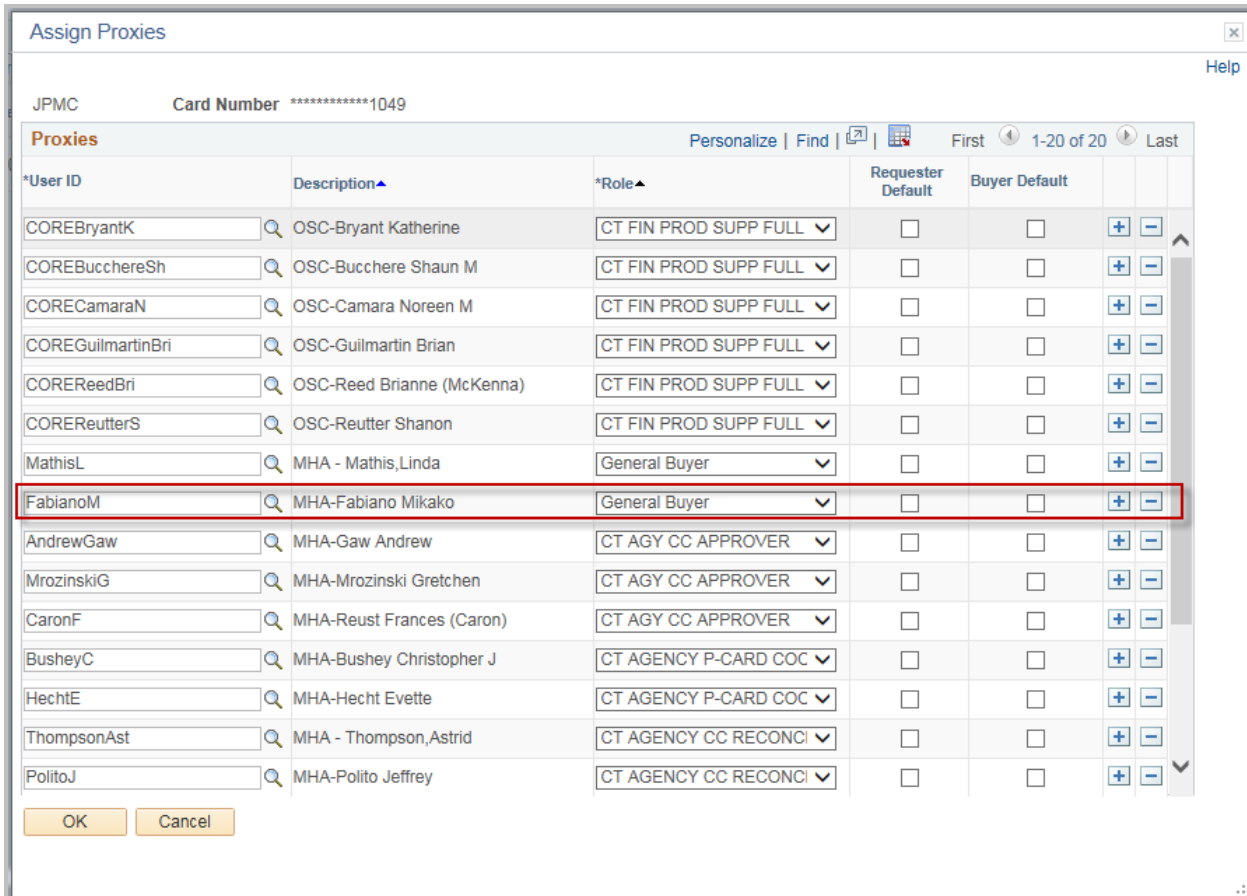
Step	Action
11.	<p>To add additional proxies</p> <p>Click the Add a New Row (+) button.</p> 

Step	Action
12.	<p>Enter the User ID of the second proxy that is being added to the P-Card.</p> <p>Note: Each user can only have one role on a card. If you enter in the same ID an error will be received.</p>

Step	Action
13.	Once you have finished adding proxies. Click the OK button. 

Step	Action
14.	Click the Save button. 

Changing/Removing Proxies



Assign Proxies

JPMC Card Number *****1049

Proxies Personalize | Find | First 1-20 of 20 Last

*User ID	Description	*Role	Requester Default	Buyer Default		
COREBryantK	OSC-Bryant Katherine	CT FIN PROD SUPP FULL	<input type="checkbox"/>	<input type="checkbox"/>	+	-
COREBucchereSh	OSC-Bucchere Shaun M	CT FIN PROD SUPP FULL	<input type="checkbox"/>	<input type="checkbox"/>	+	-
CORECamaraN	OSC-Camara Noreen M	CT FIN PROD SUPP FULL	<input type="checkbox"/>	<input type="checkbox"/>	+	-
COREGuilmartinBri	OSC-Guilmartin Brian	CT FIN PROD SUPP FULL	<input type="checkbox"/>	<input type="checkbox"/>	+	-
COREReedBri	OSC-Reed Brianne (McKenna)	CT FIN PROD SUPP FULL	<input type="checkbox"/>	<input type="checkbox"/>	+	-
COREReutterS	OSC-Reutter Shanon	CT FIN PROD SUPP FULL	<input type="checkbox"/>	<input type="checkbox"/>	+	-
MathisL	MHA - Mathis, Linda	General Buyer	<input type="checkbox"/>	<input type="checkbox"/>	+	-
FabianoM	MHA-Fabiano Mikako	General Buyer	<input type="checkbox"/>	<input type="checkbox"/>	+	-
AndrewGaw	MHA-Gaw Andrew	CT AGY CC APPROVER	<input type="checkbox"/>	<input type="checkbox"/>	+	-
MrozinskiG	MHA-Mrozinski Gretchen	CT AGY CC APPROVER	<input type="checkbox"/>	<input type="checkbox"/>	+	-
CaronF	MHA-Reust Frances (Caron)	CT AGY CC APPROVER	<input type="checkbox"/>	<input type="checkbox"/>	+	-
BusheyC	MHA-Bushey Christopher J	CT AGENCY P-CARD COC	<input type="checkbox"/>	<input type="checkbox"/>	+	-
HechtE	MHA-Hecht Evette	CT AGENCY P-CARD COC	<input type="checkbox"/>	<input type="checkbox"/>	+	-
ThompsonAst	MHA - Thompson, Astrid	CT AGENCY CC RECONCI	<input type="checkbox"/>	<input type="checkbox"/>	+	-
PolitoJ	MHA-Polito Jeffrey	CT AGENCY CC RECONCI	<input type="checkbox"/>	<input type="checkbox"/>	+	-

OK Cancel

After the agency proxies have been added in CORECT will add OSC/DAS P-Card Administrators and CORE Support to each card for technical support and reporting. Please do not remove any of these proxies.

To change an existing proxy, select the new role for the proxy, click ok and save.

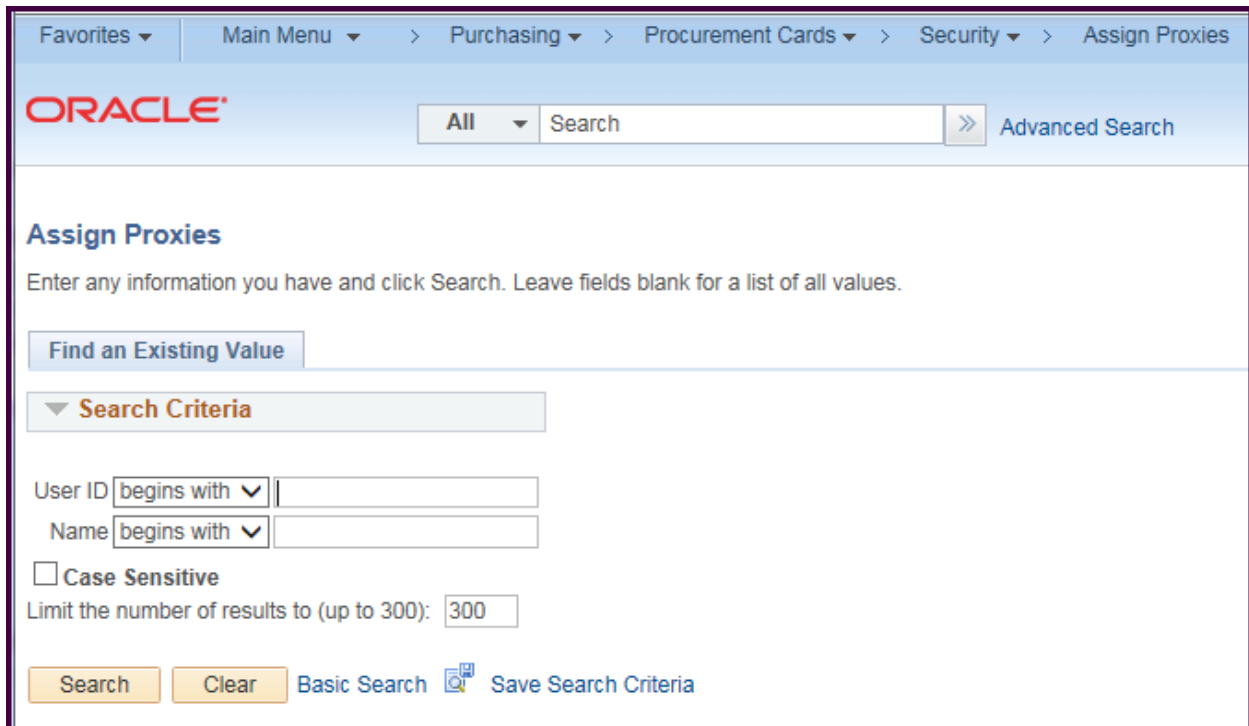
To delete a row click the – to the right of the proxy, click ok and save.

Proxy by User

There may be instances where users change roles within an agency that impact p-card. For example the current reconciler retires and a new reconciler needs to be added to multiple cards.

The Assign Proxies feature is an easy way to update multiple cards at once.

Navigation: Main Menu > Core-CT Financials > Purchasing > Procurement Cards > Security > Assign Proxies



The screenshot shows the Oracle 'Assign Proxies' search interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Purchasing > Procurement Cards > Security > Assign Proxies. Below this is the Oracle logo and a search bar with a dropdown menu set to 'All' and a search button. To the right of the search bar is an 'Advanced Search' link. The main heading is 'Assign Proxies' with a sub-heading 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button. A 'Search Criteria' section is expanded, showing two input fields: 'User ID' and 'Name', both with a 'begins with' dropdown menu. There is a checkbox for 'Case Sensitive' and a text input for 'Limit the number of results to (up to 300):' with the value '300' entered. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Using the search criteria, find the User ID for the user you will be updating.

Click Search when you have the correct ID

The Assign Proxies page displays.

Where the cardholder profiles shows all the users associated to a card, this page shows all the cards associated to a user.

Assign Proxies
MHA-Polito Jeffrey

This is a proxy user for the procurement cards which are define on the page. Specify the proxy's role for each card individually, or Apply a role to the selected cards in mass.

[Select Procurement Cards](#)

*Empl ID▲	Employee Name▲	*Card Issuer	*Card Number▲	*Role		
<input type="checkbox"/> 026594	Baumann,Shawn	JPMC	*****1772	CT AGY CC A	+ -	
<input type="checkbox"/> 048880	Polito,Jeffrey	JPMC	*****1049	CT AGENCY C	+ -	
<input type="checkbox"/> 363243	Mrozinski,Gretchen	JPMC	*****6355	CT AGY CC A	+ -	
<input type="checkbox"/> 363243	Mrozinski,Gretchen	JPMC	*****8935	CT AGY CC A	+ -	
<input type="checkbox"/> 599778	Handy,Charlene L	JPMC	*****6842	CT AGY CC A	+ -	

Select All Clear All

Assign Role: PURCHASING MODULE RP

Similar to the cardholder profile, to add or remove cards individually, click the + or – buttons to the right of the row and make the adjustments.

However, this page also allows the option of updating multiple rows. To do this check the boxes of the rows to the left of the rows (If all will be updated, click the select all

The screenshot shows the Oracle 'Assign Proxies' interface for user 'MHA-Polito Jeffrey'. It features a table with columns for Employee Name, Card Issuer, Card Number, and Role. Five rows are visible, each with a checked checkbox in the left margin. Below the table, there is a 'Select All' checkbox (checked), a 'Clear All' checkbox (unchecked), and an 'Assign Role' dropdown menu set to 'PURCHASING MODULE RP'. At the bottom, there are buttons for 'Delete', 'Copy to', 'Move to', 'Save', 'Return to Search', 'Notify', and 'Refresh'.

*Empl ID	Employee Name	*Card Issuer	*Card Number	*Role
<input checked="" type="checkbox"/> 026594	Baumann,Shawn	JPMC	*****1772	CT AGY CC A
<input checked="" type="checkbox"/> 048880	Polito,Jeffrey	JPMC	*****1049	CT AGENCY C
<input checked="" type="checkbox"/> 363243	Mrozinski,Gretchen	JPMC	*****6355	CT AGY CC A
<input checked="" type="checkbox"/> 363243	Mrozinski,Gretchen	JPMC	*****8935	CT AGY CC A
<input checked="" type="checkbox"/> 599778	Handy,Charlene L	JPMC	*****6842	CT AGY CC A

To change the users role on the cards select the dropdown next to the assign role then click Apply

The screenshot shows the Oracle 'Assign Proxies' interface for user 'MHA-Polito Jeffrey'. It features a table with columns for Empl ID, Employee Name, Card Issuer, Card Number, and Role. A dropdown menu is open for the 'Assign Role' column, showing options: 'CT AGENCY CC RECONCILER', 'CT AGY CC APPROVER', 'PURCHASING MODULE RPT MAKER', and 'PURCHASING MODULE VIEWER'. The 'PURCHASING MODULE RPT MAKER' option is highlighted. Below the table are buttons for 'Delete', 'Copy to', and 'Move to'. At the bottom are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'.

*Empl ID	Employee Name	*Card Issuer	*Card Number	*Role
<input checked="" type="checkbox"/> 026594	Baumann, Shawn	JPMC	*****1772	CT AGY CC AI
<input checked="" type="checkbox"/> 048880	Polito, Jeffrey	JPMC	*****1049	CT AGENCY C
<input checked="" type="checkbox"/> 363243	Mrozinski, Gretchen	JPMC	*****6355	CT AGY CC AI
<input checked="" type="checkbox"/> 363243	Mrozinski, Gretchen	JPMC	*****8935	CT AGY CC AI
<input checked="" type="checkbox"/> 599778	Handy, Charlene L	JPMC	*****6842	CT AGY CC AI

To mass delete the rows, click the delete button.

Training Guide PCard




To Copy the same cards to another use the Copy to button.
The ProCard Proxy Copy/Move page will display.
Enter the new user id and click OK
Both users will have access to the same cards.

ProCard Proxy Copy/Move ✕

[Help](#)

The user identified here will acquire the proxy role for the procurement cards selected in the Assign Proxies page. If the user is already a proxy for a selected card, then no proxy assignment will be copied/moved. Also if the user does not belong to a given role, then no proxy assignment will be copied/moved. Please check the exceptions page for proxy assignments that did not get copied/moved.

To User ID 

The Move to button works the same as the Copy to button except that it will delete the cards from the original user.

To add multiple cards to a user click on the Select Procurement Cards hyperlink and the top of the page

Assign Proxies
MHA-Polito Jeffrey

This is a proxy user for the procurement cards which are define on the page. Specify the proxy's role for each card individually, or Apply a role to the selected cards in mass.

Select Procurement Cards

*Empl ID▲	Employee Name▲	*Card Issuer	*Card Number▲	*Role
<input type="checkbox"/> 026594	Baumann, Shawn	JPMC	*****1772	CT AGY CC AI
<input type="checkbox"/> 048880	Polito, Jeffrey	JPMC	*****1049	CT AGENCY C
<input type="checkbox"/> 363243	Mrozinski, Gretchen	JPMC	*****6355	CT AGY CC AI
<input type="checkbox"/> 363243	Mrozinski, Gretchen	JPMC	*****8935	CT AGY CC AI
<input type="checkbox"/> 599778	Handy, Charlene L	JPMC	*****6842	CT AGY CC AI

Select All Clear All

Assign Role: PURCHASING MODULE RP

The ProCard Proxy – Select Cards page will display

ProCard Proxy - Select Cards

Help

▼ Procurement Card Selection Criteria

Business Unit

Employee ID

Card Issuer

Search

▼ Select Procurement Cards Personalize | Find | View All | | First 1 of 1 Last

Selected	Employee Name	Card Issuer	Card Number ▲
<input type="checkbox"/>			

Select All Clear All

OK Cancel

Enter the selection criteria or click search for all available cards

ProCard Proxy - Select Cards

Help

▼ Procurement Card Selection Criteria

Business Unit Mental Heath & Addiction Serv.

Employee ID

Card Issuer

Search

▼ Select Procurement Cards Personalize | Find | View All | | First 1-8 of 73 Last

Selected	Employee Name	Card Issuer	Card Number
<input type="checkbox"/>	Abelli,Randol	JPMC	*****3364
<input type="checkbox"/>	Aldi,Marcellina	JPMC	*****7811
<input type="checkbox"/>	Allison,Jean	JPMC	*****2838
<input type="checkbox"/>	Bajek,Linda	JPMC	*****0288
<input type="checkbox"/>	Bajek,Linda	JPMC	*****2692
<input type="checkbox"/>	Beniash,Jessica	JPMC	*****8605
<input type="checkbox"/>	Callahan,Richard	JPMC	*****4444
<input type="checkbox"/>	Chaffee,Paula	JPMC	*****0095

Select All Clear All

OK Cancel

Check the boxes next to the cards to be added or click Select All if all will added.

Click OK when done.

The new users are added to the list – select a role for each user or if they are all the same or select a role from the assign role drop down box then click apply

Assign Proxies

MHA-Polito Jeffrey

This is a proxy user for the procurement cards which are define on the page. Specify the proxy's role for each card individually, or Apply a role to the selected cards in mass.

Select Procurement Cards

*Empl ID	Employee Name	*Card Issuer	*Card Number	*Role		
<input type="checkbox"/> 026594	Baumann,Shawn	JPMC	*****1772	CT AGY CC A	+ -	
<input type="checkbox"/> 599778	Handy,Charlene L	JPMC	*****6842	CT AGY CC A	+ -	
<input checked="" type="checkbox"/> 646840	Callahan,Richard	JPMC	*****4444		+ -	
<input checked="" type="checkbox"/> 161660	Beniash,Jessica	JPMC	*****8605		+ -	
<input checked="" type="checkbox"/> 453749	Allison,Jean	JPMC	*****2838		+ -	
<input type="checkbox"/> 363243	Mrozinski,Gretchen	JPMC	*****8935	CT AGY CC A	+ -	
<input type="checkbox"/> 363243	Mrozinski,Gretchen	JPMC	*****6355	CT AGY CC A	+ -	
<input type="checkbox"/> 048880	Polito,Jeffrey	JPMC	*****1049	CT AGENCY C	+ -	

Select All Clear All

Assign Role: PURCHASING MODULE RP

Click Save when finished.

Query

There is also a query to aid in reviewing proxy setup for an agency:

CT_CORE_CC_CARD_PROXY

This query will list all of the proxies for each card within an agency