

# PEOPLESOFT PROCARD MODULE LOG ON INSTRUCTIONS FOR CARDHOLDERS



1

Go to: [www.csufresno.edu](http://www.csufresno.edu)  
Log into "My Fresno State"



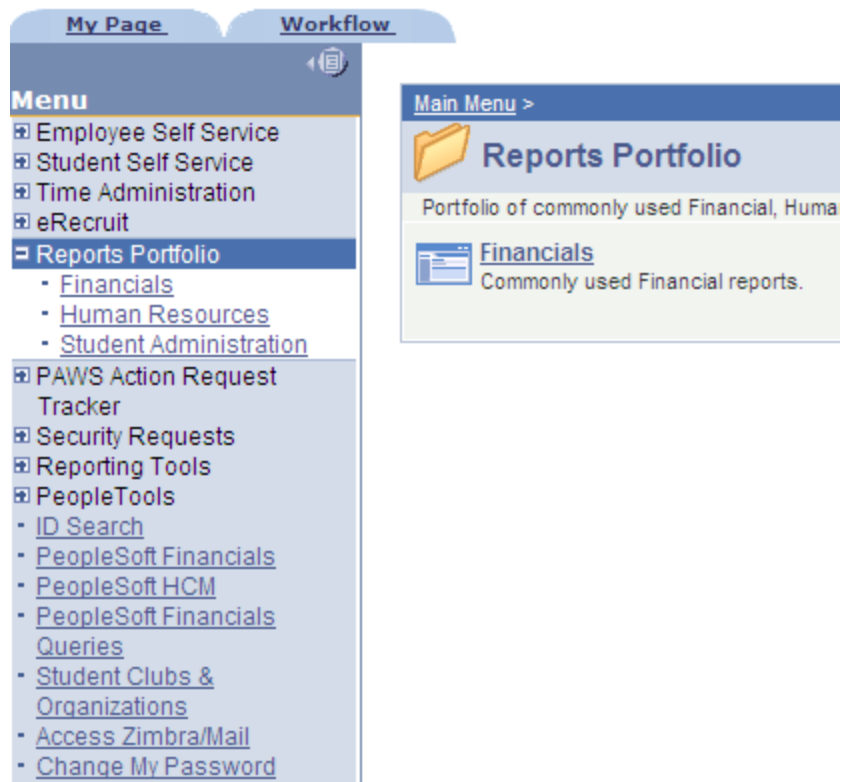
Sign In

New User? [Get an account now!](#)  
Need Help? [Click here for My Help](#)



2

Select Reports Portfolio  
Select Financials



My Page    Workflow

Menu

- Employee Self Service
- Student Self Service
- Time Administration
- eRecruit
- Reports Portfolio
  - Financials**
    - Human Resources
    - Student Administration
- PAWS Action Request Tracker
- Security Requests
- Reporting Tools
- PeopleTools
  - ID Search
  - PeopleSoft Financials
  - PeopleSoft HCM
  - PeopleSoft Financials Queries
  - Student Clubs & Organizations
  - Access Zimbra/Mail
  - Change My Password



## Financials

[Help](#)

Click a link below to run your saved reports. Or click the link labeled Customize Report List to add/remove reports from your Reports Portfolio Homepage.

★ Recommended Report

[Customize Report Selections](#)

### Purchase Orders

<a href="#">CSU PO Remaining Balance Inquiry</a>	Inquiry	<a href="#">Details...</a>
<a href="#">Employee Direct Deposit</a>	Inquiry	<a href="#">Details...</a>
★ <a href="#">PO Activity Summary</a>	Inquiry	<a href="#">Details...</a>
<a href="#">PO Detail Activity Rpt</a>	Formatted Report	<a href="#">Details...</a>
<a href="#">PO Vouchered Activity Recap</a>	Query Report	<a href="#">Details...</a>
<a href="#">ProCard Adjustment</a>	Inquiry	<a href="#">Details...</a>
<a href="#">ProCard Completed Inquiry</a>	Inquiry	<a href="#">Details...</a>
★ <a href="#">Purchase Order Detail</a>	Inquiry	<a href="#">Details...</a>
★ <a href="#">Purchase Order Listing</a>	Query Report	<a href="#">Details...</a>
★ <a href="#">Purchase Order Print (Copy)</a>	Formatted Report	<a href="#">Details...</a>
★ <a href="#">Purchase Orders Not Invoiced</a>	Query Report	<a href="#">Details...</a>

[Customize Report Selections](#)

3

Under Purchase Order Report List

- Look for ProCard Adjustment and/or ProCard Completed Inquiry

If ProCard Reports are not listed, click on the “Customize Report Selections” link shown at the top and bottom of the selection lists.



# Financials

[Help](#)

Click the checkbox next to all the reports you want to appear on your Reports Homepage.

[Request a new report or request security to an existing report.](#)



If ProCard Reports are not listed below, **DO NOT** click on this link to request security to the report (See page 4 for instructions).

★ Recommended Report

[Check All](#)   [Uncheck All](#)   [Save](#)   [Cancel](#)

## Purchase Orders

<input checked="" type="checkbox"/>		<a href="#">CSU PO Remaining Balance Inquiry</a>	Inquiry	<a href="#">Details...</a>
<input checked="" type="checkbox"/>		<a href="#">Employee Direct Deposit</a>	Inquiry	<a href="#">Details...</a>
<input checked="" type="checkbox"/>	★	<a href="#">PO Activity Summary</a>	Inquiry	<a href="#">Details...</a>
<input checked="" type="checkbox"/>		<a href="#">PO Detail Activity Rpt</a>	Formatted Report	<a href="#">Details...</a>
<input checked="" type="checkbox"/>		<a href="#">PO Vouchered Activity Recap</a>	Query Report	<a href="#">Details...</a>
<input checked="" type="checkbox"/>		<a href="#">ProCard Adjustment</a>	Inquiry	<a href="#">Details...</a>
<input checked="" type="checkbox"/>		<a href="#">ProCard Completed Inquiry</a>	Inquiry	<a href="#">Details...</a>
<input checked="" type="checkbox"/>	★	<a href="#">Purchase Order Detail</a>	Inquiry	<a href="#">Details...</a>
<input checked="" type="checkbox"/>	★	<a href="#">Purchase Order Listing</a>	Query Report	<a href="#">Details...</a>
<input checked="" type="checkbox"/>	★	<a href="#">Purchase Order Print (Copy)</a>	Formatted Report	<a href="#">Details...</a>
<input checked="" type="checkbox"/>	★	<a href="#">Purchase Orders Not Invoiced</a>	Query Report	<a href="#">Details...</a>

[Check All](#)   [Uncheck All](#)   [Save](#)   [Cancel](#)

4

## Purchase Order Report List

- Check the box next to: ProCard Adjustment and ProCard Completed Inquiry.
- Click on Save

# PEOPLESFT PROCARD MODULE LOG ON INSTRUCTIONS FOR NON-CARDHOLDERS


Non-Cardholders such as Administrative Staff who assist with the monthly reconciliation of procurement card transactions may be granted access to the ProCard Module for:

- Review of transactions
  - Chartfield adjustments
  - Printing Reports
- 
- To apply for access to the ProCard Module:
    - Log onto My Fresno State
    - Click on Security Requests in the Menu
    - Click on New Security Request




1

- Menu**
- Employee Self Service
  - Student Self Service
  - Time Administration
  - eRecruit
  - Reports Portfolio
  - PAWS Action Request Tracker
  - Security Requests**
    - Confidential Agreement
    - New Security Request
    - View Security Request
    - View User Security
  - Reporting Tools
  - PeopleTools

**Main Menu >**

 **Security Requests**

Security Request System

 <a href="#">Confidential Agreement</a> Confidential Agreement Form	 <a href="#">New Security Request</a> Create a New Security Request
 <a href="#">View User Security</a> View Security Information for Users	

## Online Security Request Form

[Need Help?](#)

Please complete the following form for new or change of access to the PeopleSoft Human Resources, Student Administration and Financials systems. Fields with an asterisk (\*) are required in order for the form to be submitted.

**If you are experiencing a problem with your current security, please enter that information directly in PAWS Action Request Tracking.**

### Select Request Type

**User Security**

Used to request security for a new user or to request additional security for an existing user. (Please do not enter requests for problems with security.)

**After Hours Access**

Used to request access to Administrative areas during non-business hours for users restricted to that time.

2

Check User Security 

# Online Security Request Form

[Need Help?](#)

Use this form to search for and select the employees that this request will apply for. You may search on Employee ID, Department, Last Name, or User Type. **You only have to enter a value in one field.** Press the Search button to search for the values entered.

To select an employee, click the check box in front of their name. If an employee has multiple job records, please select the position and department this security relates to.

After selecting employees, you must press the ADD button add the selected employees to the request. Pressing the Search button again will start a new search and reset the selection boxes.

2

## User Search (enter one or more values)

ID:  Dept:

Last Name:

Enter Employee ID #, if known,  
or Employee Last Name  
Click on Search

## User Information

	ID	Name	Type	RCD	Position	Dept	Department Name	Start Date	Access Hours
<input type="checkbox"/>				0					

## Online Security Request Form

[Need Help?](#)

Use this form to search for and select the employees that this request will apply for. You may search on Employee ID, Department, Last Name, or User Type. You only have to enter a value in one field. Press the Search button to search for the values entered.

To select an employee, click the check box in front of their name. If an employee has multiple job records, please select the position and department this security relates to.

After selecting employees, you must press the ADD button add the selected employees to the request. Pressing the Search button again will start a new search and reset the selection boxes.

### User Search (enter one or more values)

ID:  Dept:

Last Name:

### User Information

	ID	Name	Type	RCD	Position	Dept	Department Name	Start Date	Access Hours
<input type="checkbox"/>	104770653	Paul Pcard	Employee	0	Supervisor I	41410	Printing And Mail Services	05/16/2005	Bus Hours
<input checked="" type="checkbox"/>	104770653	Paul Pcard	Employee	2	Supervisor I	41410	Printing And Mail Services	08/09/2010	Bus Hours

3

- Place check in box to select appropriate user from names that are listed.
- Click on Add

## Online Security Request Form

[Need Help?](#)

The following select users will be designated as receiving the changes in security for this form. Use the plus (+) button to return to search to add users and the minus (-) button to delete individual users from this request.

### User Information

<b>User ID:</b>	12345678	<b>Rcd</b>	2	<b>Employee</b>	<input type="button" value="+"/>	<input type="button" value="-"/>
<b>Name:</b>	Paul P Card					
<b>Position:</b>	Repro Processes Supervisor I					
<b>Dept:</b>	41410	Printing And Mail Services				
<b>Access Hours</b>	Business Hours (Limited)					

4



If this is correct employee, click on Next Tab.





- Student Services Center**  
General departmental role to provide support and information of students. Provides access to the Student Services Center located in My Fresno State under Student Support folder.
- Department Student Support**  
Provides various reports pertaining to student information required for Academic departments business.
- Dept Administrative Assistants - Assign Advisor**  
Grants access to a Dept Administrative Assistants to assign the Faculty Advisor for students.
- Student Advising Support (Non-Faculty)**  
Staff level role for Student Advising. Provides access and reports pertaining to student advising and the support of Faculty Advisors required by Academic departments. Provides access to the Advisement and DARS links located in My Fresno State under Student Support folder.
- Academic Course Maintenance**  
Provides access and reports pertaining to Course Scheduling and Curriculum required by Academic departments.
- Student Advisor (Faculty-Only)**  
Faculty-Only role for Student Advising. Provides access and reports for Faculty Advisors. Provides Advising Center and requires Faculty Center access, as well as, the Advisement link located in My Fresno State under Faculty Self Service folder.

### Financial Application

- Financials Department User**  
General role to grant access to Financials system as required by a departmental level user. Provides basic inquiry and reports necessary for financial transactions tracking at departmental level. Given to all Financials users.

5

 Previous tab

 Next tab



Do not check boxes. Click on Next Tab.

## Online Security Request Form

[Need Help?](#)

Please specify if this request is for permanent access or for a limited date range.

Permanent access requests will be granted as long as the employee is actively employed in the position and department identified on this request.

If this request is date limited, please specify the effective date range for the access. The access will be active for the employees and dates specified in the request, or until no longer actively employed in the position and department identified on this request.

### Security Dates Effective

---


6


Request is for:  Permanent Access

A Range of Dates

Effective From:

Effective Thru:

 Previous tab

 Next tab



Check whether this request is for permanent access or for a limited time period (enter effective dates)

Click on Next Tab.

# Online Security Request Form

[Need Help?](#)

## Explanation of Request / Special Instructions

Please provide an explanation of the job duties that require this access for the person(s) requested. **Failure to provide this information may delay this request.**

Also, you may use this box to enter any additional information or instructions you fill are necessary to properly complete this request.

7

- Enter message in explanation box:  
*Employee needs access to the ProCard Module Adjustment and Inquiry Screens.*
- Click on Save

## Submit the Request

Press the **SAVE** button at the bottom of the form to complete the request.

After submitting the request a confirmation email will be sent to you and the employee(s) specified on the form. The form will be routed to the MPP and Supervisor (if applicable) for the employee(s) specified on the form for approval. As the request is approved and processed email notices will be sent to you and the employee(s) specified on the form.

- You will receive an e-mail once the request has been completed and access established.

After submitting the request a confirmation email will be sent to you and the employee(s) specified on the form. The form will be routed to the MPP and Supervisor (if applicable) for the employee(s) specified on the form for approval. As the request is approved and processed email notices will be sent to you and the employee(s) specified on the form.

**Your Request has been submitted. Request Number is 004. . .**

- Use the ProCard Adjustment Screen for current month transactions:
  - Change chartfields
  - Print the Cardholder Statement

My Page
Workflow

**Menu**

- Employee Self Service
- Student Self Service
- Time Administration
- eRecruit
- Reports Portfolio
  - Financials
  - Human Resources
  - Student Administration
- PAWS Action Request Tracker
- Security Requests
- Reporting Tools
- PeopleTools
  - ID Search
  - PeopleSoft Financials
  - PeopleSoft HCM
  - PeopleSoft Financials Queries
  - Student Clubs & Organizations
  - Access Zimbra/Mail
  - Change My Password

### ProCard Adjustment

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

**Find an Existing Value**

Business Unit: = FRSNO 🔍

Origin: begins with   🔍

Invoice Date: =   📅

Last Name: begins with  

First Name: begins with  

Invoice Number: begins with  

Case Sensitive

Search
Clear
Basic Search
📄 Save Search Criteria

- Use the ProCard Completed Inquiry Screen to view prior month transactions:
  - View transactions
  - Run Reports

### ProCard Completed Inquiry Page

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

#### Find an Existing Value

---

Business Unit:	=	▼	FRSNO	
Origin:	begins with	▼		
Invoice Date:	=	▼		
Last Name:	begins with	▼		
First Name:	begins with	▼		
Invoice Number:	begins with	▼		

Case Sensitive

Search

Clear

[Basic Search](#)



[Save Search Criteria](#)