PEOPLESOFT PROCARD MODULE LOG ON INSTRUCTIONS FOR CARDHOLDERS

1

Go to: www.csufresno.edu

Log into "My Fresno State"

2

Select Reports Portfolio

Select Financials

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.

★ Recommended Report

Check All Uncheck All Save Cancel

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

Purchase Orders

☑		CSU PO Remaining Balance Inquiry	Inquiry	Details...
☑		Employee Direct Deposit	Inquiry	Details...
☑	★	PO Activity Summary	Inquiry	Details...
☑		PO Detail Activity Rpt	Formatted Report	Details...
☑		PO Vouchered Activity Recap	Query Report	Details...
☑		ProCard Adjustment	Inquiry	Details...
☑		ProCard Completed Inquiry	Inquiry	Details...
☑	★	Purchase Order Detail	Inquiry	Details...
☑	★	Purchase Order Listing	Query Report	Details...
☑	★	Purchase Order Print (Copy)	Formatted Report	Details...
☑	★	Purchase Orders Not Invoiced	Query Report	Details...

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

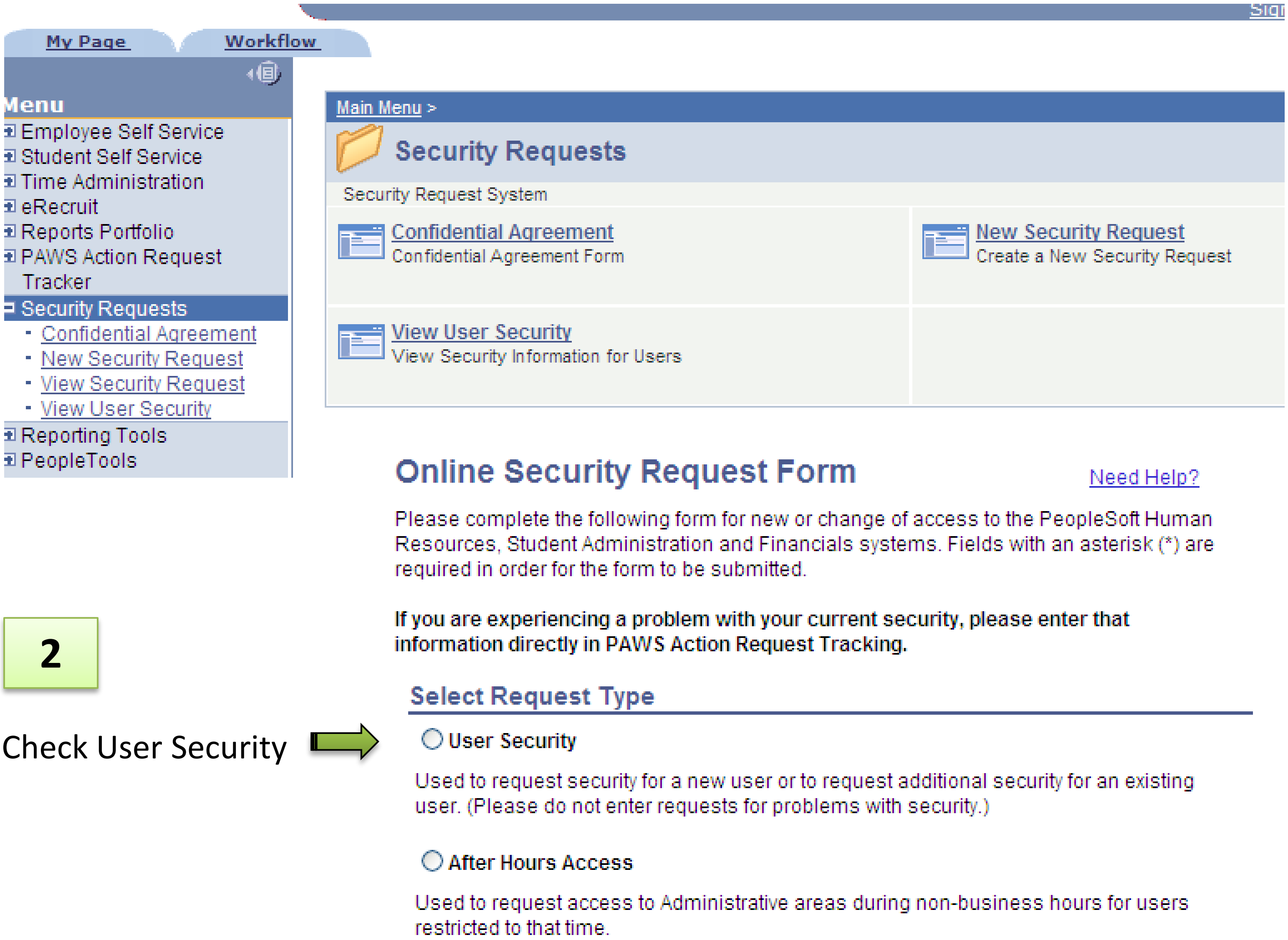
PEOPLESOFT PROCARD MODULE LOG ON INSTRUCTIONS FOR NON-CARDHOLDERS

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

1

- 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



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: Search

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
☐				0					

Add

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: Search

Last Name: PCARD

User Information

	ID	Name	Type	RCD	Position	Dept	Department Name	Start Date	Access Hours
☐	104770653 (	Paul Pcard	Employee	0	Supervisor I	41410	Printing And Mail Services	05/16/2005	Bus Hours
☑	104770653 (	Paul Pcard	Employee	2	Supervisor I	41410	Printing And Mail Services	08/09/2010	Bus Hours

Add

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 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

User ID: 12345678 Rcd 2 Employee

Name: Paul P Card

Position: Repro Processes Supervisor I

Dept: 41410 Printing And Mail Services

Access Hours Business Hours (Limited)

Previous tab Next tab

If this is correct employee, click on Next Tab.

4

- [ ] **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 permenant 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.

Employee needs access to the ProCard Module Adjustment and Inquiry Screens

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.

Previous tab   Save

7

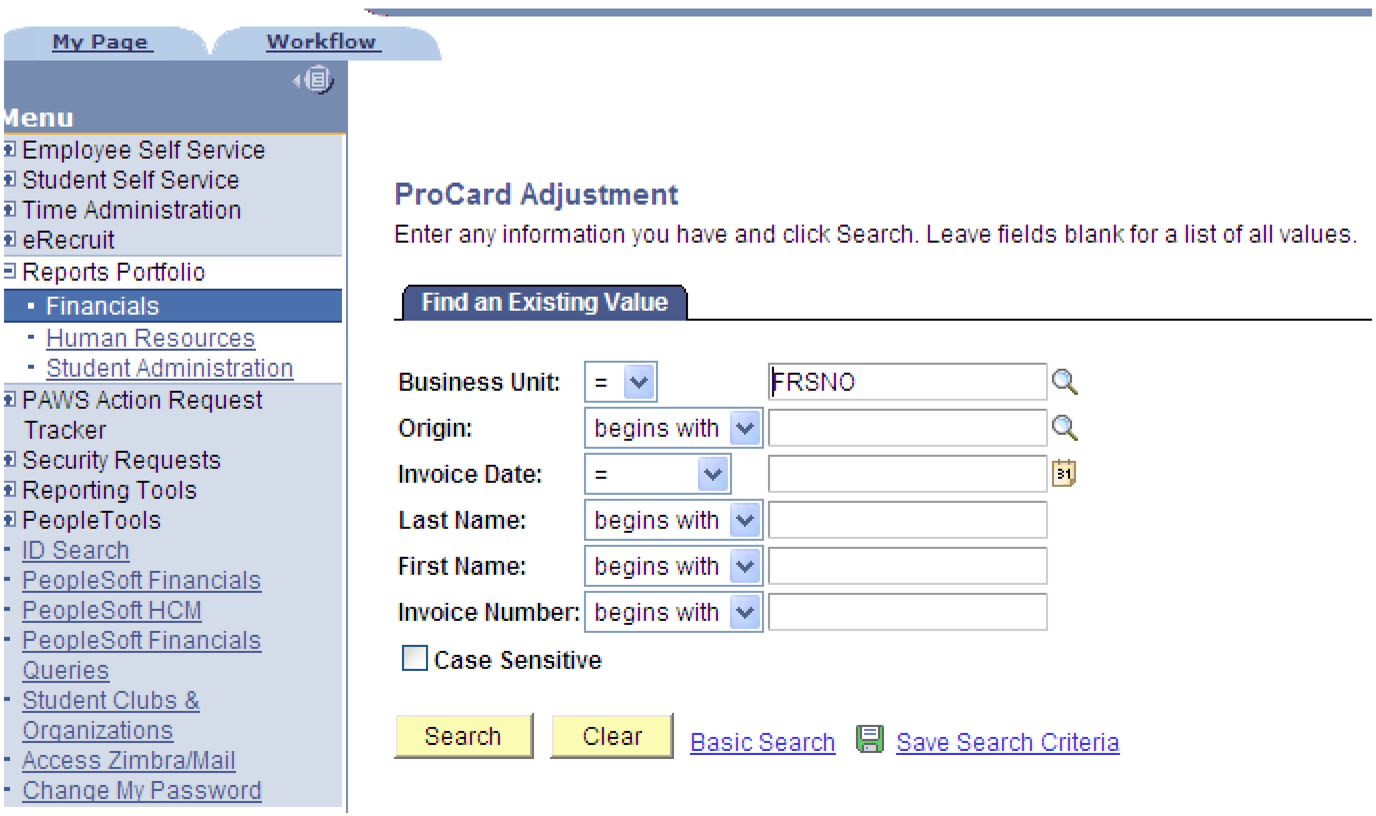
- Enter message in explanation box: *Employee needs access to the ProCard Module Adjustment and Inquiry Screens.*
- Click on Save

- 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



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