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# P-CARD USER MANUAL

## MAINTAINING DEFAULT OR ASSIGNED PCA, INDEX, OR LOCATION CODES

### INTRODUCTION

When transactions are uploaded to P-Card from the credit card company, they are coded with the default PCA for the card holder(s). P-Card administrators can change their users' default PCA, Index, or Location codes, and to their users' assigned approval PCA or Index. (Administrators in agencies that use Locations will be able to make similar changes to their Locations and Location codes.)

By using **Maintain PCA**, **Maintain Index**, and/or **Maintain Loc**, all users can be updated with a new default PCA/Index/Location – you do not have to edit each individual user. You can also add or delete assigned approval PCA/Index/Location codes for your approvers.

Administrators can view which users are currently assigned a given default PCA/Index/Location or an Approval PCA/Index/Location to assess which users will be affected.

### CHANGE THE DEFAULT PCA/INDEX/LOCATION

On the P-Card main menu, select **Admin**, click **Maintain PCA**, **Maintain Index**, and/or **Maintain Loc** (few agencies have this option).

Figure 1 - Maintain PCA



1. Select **Change Default PCA** (or Index or Location).
2. Enter the currently assigned PCA or Index in the **Old PCA/Index/Location** field, and then enter the **New PCA/Index/Location**.
3. Click **Change**.

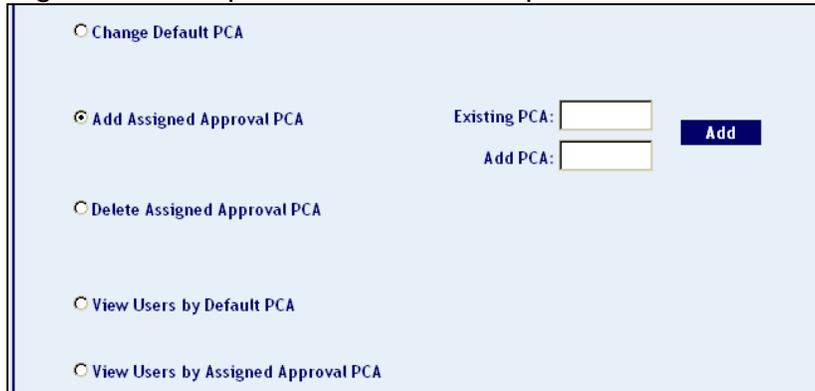
## ADD AN ASSIGNED APPROVAL PCA/INDEX/LOCATION

1. Select **Add Assigned Approval PCA** (or Index or Location).
2. Enter the **Existing PCA/Index/Location**.
3. Enter the new PCA (or Index or Location) in the **Add PCA/Index/Location** field.
4. Click **Add**. All approvers assigned to the existing PCA/Index/Location will then be assigned the additional PCA/Index/Location.

## DELETE AN ASSIGNED APPROVAL PCA/INDEX/LOCATION

1. Select **Delete Assigned Approval PCA** (or Index or Location).
2. Enter the PCA, Index, or Location to delete.
3. Click **Delete**.

Figure 2 – Example of Maintain PCA options



Change Default PCA

Add Assigned Approval PCA Existing PCA:  Add

Add PCA:

Delete Assigned Approval PCA

View Users by Default PCA

View Users by Assigned Approval PCA

## VIEW USERS ASSIGNED WITH A PCA, INDEX, OR LOCATION

To view the users who are currently assigned a given default or a specific assigned approval PCA, Index, or Location, select one of the following:

1. **View Users by Default PCA/Index/Location** – Enter a PCA, Index, or Location and click **Run**. A list of users currently assigned that PCA/Index/Location will be displayed by last name, first name.
2. **View Users by Assigned Approval PCA/Index/Location** - Enter a PCA, Index, or Location and click **Run**. A list of users currently assigned that PCA/Index/Location will be displayed by last name, first name.

## MAINTAIN LOCATIONS

If you selected **Maintain Loc**, there is an additional **Maintain Locations** link that will display your agency's location codes and allow you to edit or delete them or create new ones.

Figure 3 - Maintain Locations link



1. Click the **Maintain Locations** link. You can perform any of the following:
  - Click **Edit** to edit a Location:
    - Change the **Code** and/or **Location Description**, then click **Save**.
  - Click **Delete** to delete a Location.
  - Add a new location at the bottom of the list of Locations:
    - Enter the **Code** and **Location Description** and then click **Save**.

Figure 4 – Add a new Locations example

Code	Location Description	
AG	GENERAL OFFICE	<a href="#">Edit</a> <a href="#">Delete</a>
AG3	GENERAL OFFICE REGION 3	<a href="#">Edit</a> <a href="#">Delete</a>
AG4	GENERAL OFFICE REGION 4	<a href="#">Edit</a> <a href="#">Delete</a>
AG5	GENERAL OFFICE REGION 5	<a href="#">Edit</a> <a href="#">Delete</a>
AG6	GENERAL OFFICE REGION 6	<a href="#">Edit</a> <a href="#">Delete</a>