P-CARD USER MANUAL 1

AGENCY SETTINGS: BUDGET FISCAL YEAR, RESTRICT APPROVER, E-MAIL NOTIFICATION 1

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BFY, RESTRICT APPROVERS, AND EMAIL NOTIFICATION 1

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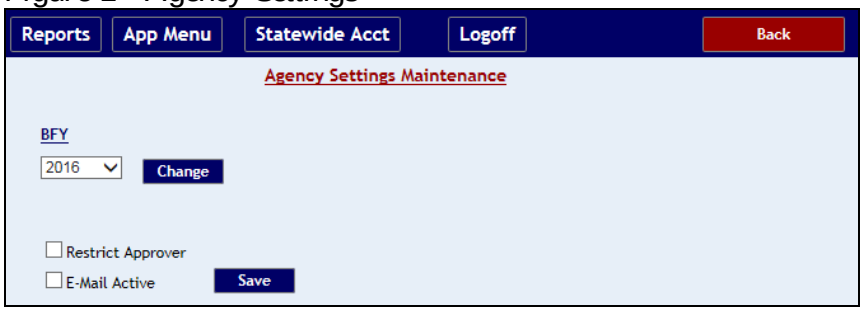
INTRODUCTION

In **Agency Settings**, your agency can set the Budget Fiscal Year (BFY), restrict all approvers from approving their own transactions, and enable e-mail notification for the P-Card verifiers. (Determine how many approval levels your agency needs (a hierarchy of approval levels 1 through 3) and the names/definitions of the levels, and then request the State Controller's Office to create them.) Once SCO creates these, your agency can assign their users as approvers - see Maintaining P-Card Users documentation.)

BFY, RESTRICT APPROVERS, AND EMAIL NOTIFICATION

1. On the P-Card main menu, select **Admin**, and then click **Agency Settings**.

Figure 1 - Agency Settings



2. To change the BFY, select the year from the **BFY** menu, and then click **Change**. The BFY affects the look up and validation of PCAs and Indexes. If you do not see PCAs or Indexes that you expect to see, or cannot add PCAs or Indexes to a Verifier or Approver, review this setting.
3. To restrict Approver and Approver All users from approving their own transactions, click the check box next to **Restrict Approver** then click **Save**. Restricted users will still be able to view their transactions in P-Card.
4. To enable email notification for verifiers, click the check box next to **E-Mail Active** then click **Save**. When activated, approvers will see a dialogue box with the names of Approvers of the PCA on the transactions. The verifiers can then select who they want to notify regarding the transmittal. This will only apply to verifiers. Also, be certain the P-Card approvers have their correct e-mails in the system.