
P-CARD USER MANUAL.....	1
ADDING A GROUP NAME (GROUP CARD)	1
INTRODUCTION	1
ADD A GROUP NAME.....	1
ADD A CREDIT CARD NUMBER.....	2
ADD A DEFAULT PCA OR INDEX.....	3
ADD PROXY VERIFIERS TO VERIFY GROUP CARD TRANSACTIONS.....	3

P-CARD USER MANUAL

ADDING A GROUP NAME (GROUP CARD)

INTRODUCTION

To obtain a group P-Card, contact the Department of Administration, Division of Purchasing at 208.332.1608.

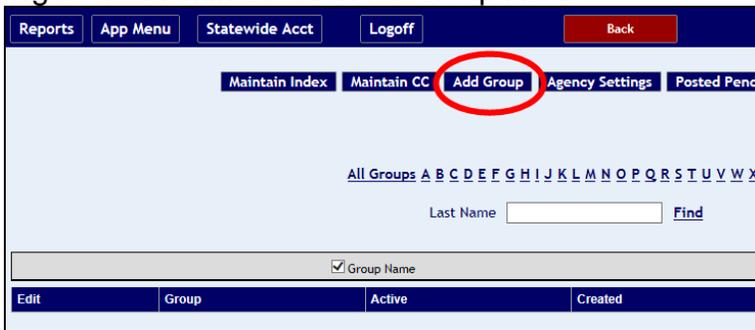
A **Group Name** is the name (in the P-Card application) of the P-Card issued to the agency for multiple users. It is not necessarily the name on the P-Card itself. Only one card is associated with a **Group Name**. Users are added as a Proxy Verifiers to the Group Card through the **Maintain CC** screen.

ADD A GROUP NAME

This must be done before adding the card number.

1. On the P-Card main menu, select **Admin**, and then check the **Group Name** check box. (When **Group Name** is checked, the individual user names will not be displayed and Group names are not seen on the same list as individual users. Uncheck the **Group Name** check box to view the individual users.)
2. Click **Add Group**.

Figure 1 - Admin selection for Group Name



3. Type a **Group Name** (do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****) and make sure the **Active Group** check box is checked.

4. Click **Save** (on the top menu bar) before adding a credit card number.

Figure 2 - Group Name menu

The screenshot shows a web application interface for managing Group Names. At the top, there is a navigation bar with buttons for 'App Menu', 'Statewide Acct', 'Logoff', 'Back', and 'Save'. The main content area is divided into two panels. The left panel contains a 'Group Name' form with fields for 'Group Name', 'Creation Date', and a checkbox for 'Active Group'. Below this is a section for 'Choose Default PCA/Index' with a table for 'Code' and 'Description'. The right panel is titled 'Credit Cards' and contains a table with columns 'CC#', 'Active', 'Type', and 'Description'. The table has one row with '120', a checked checkbox, 'BOAV', and 'group card'. There are 'Edit' and 'Proxy' links for this row. Below the table is a 'Save' button and a message 'Click Proxy to View Proxy Verifiers'.

ADD A CREDIT CARD NUMBER

NOTE: Only one card can be added to a **Group Name**.

1. Enter the last ten digits of the P-Card number in the **CC#** field. Actual credit card numbers must be entered into the application.
2. Select **Active** to make the card active in the P-Card application. The P-Card can be active for one group, although a group may have several card numbers assigned.
3. Enter a **Description** (recommended). Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****.
4. Click **Save** next to the card information.
5. Do not try to add Proxy Verifiers on this screen – you will get an error message. Use the **Maintain CC** screen in P-Card as described below.

Figure 3- Save the card number

The screenshot shows the same web application interface as Figure 2, but with the 'Credit Cards' section updated. The table now has one row with '5000000005', a checked checkbox, 'BOAV', and 'group card'. There are 'Edit' and 'Delete' links for this row. Below the table is a 'Proxy Verifiers' section with an 'Add' button and a dropdown menu. A red message 'Credit Card Added' is displayed above the Proxy Verifiers section. The left panel remains the same as in Figure 2.

ADD A DEFAULT PCA OR INDEX

Set up a Default Index or PCA for the group card to automatically fill in the PCA/Index code for the card in the Verifier's transaction grid. If your PCA/Index codes look up other fiscal codes, those other fiscal codes will also be automatically filled in.

1. Select **Choose Default PCA** or **Choose Default Index** (the choice displayed depends on your agency structure) to assign a default PCA or Index.
2. Click **Select** next to the PCA or Index needed. The **Default PCA/Index** will be added.
3. Click **Save** (on the top menu bar).

Figure 4 – Adding a Default PCA or Index

Code	Description
01000	BOARD OF HEALTH
02100	PUBLIC HEALTH DISASTER
03000	FAMILY HEALTH GENERAL

ADD PROXY VERIFIERS TO VERIFY GROUP CARD TRANSACTIONS

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

Figure 4 - Maintain credit card button

Edit	Last	First	Middle	Email	Holder	Active	Created	PCA/Ind
	ALLEN	ARVILLA		aallen@idl.idaho.gov	✓	✓	6/2/2004	71011

2. In the list of cards and card holders, click **Card Holder** to sort the list of P-Cards by card holder name so that you can locate the group name you have created.

Figure 5 - List of P-Cards

The screenshot shows a web application interface for managing P-cards. At the top, there are navigation buttons: 'App Menu', 'Statewide Acct', 'Logoff', and a red 'Back' button. Below this is a table with columns: 'CC#', 'Active', 'CCType', 'Description', and 'Card Holder'. The 'Card Holder' column header is circled in red. The table contains several rows of data, including active and inactive cards. To the right of the table is a form with fields for 'CC#', 'Active' (checkbox), 'Type' (dropdown menu), 'Card Holder' (dropdown menu), and 'Description' (text input). There are 'Save' and 'Delete' buttons at the bottom of the form.

CC#	Active	CCType	Description	Card Holder
4000000004	✓	BOAV	TEST VISA	KEMP
4000000000	✓	BOAV	TEST VISA	TAWNEY
4000000003	✓	BOAV	TEST VISA	BAUER
4000000008	✓	BOAV	TEST VISA	LARSEN
7000000002	✓	WFMC	10/24/06	HALL
7000000003		WFMC		GRAY (Inactive)
7000000009		WFMC	added 8/03	EVENSON (Inactive)

3. Click the group card number in the **CC#** column to select it.
4. Click the **Proxy Verifiers** drop down menu and select the name of a Proxy Verifier. (Since any user can be a proxy verifier, all user names will be in this list)
5. Click **Add**.
6. To remove a proxy verifier, click **Del** next to the name.