

9.2 Adding a New P-Card in ctcLink

Purpose: Use this document as a reference for how to add a new procurement card and resolve missing card information in a staged Visa transaction in ctcLink.

Audience: Finance staff.

 You must have at least one of these local college managed security roles:

- CC_ADMINISTRATOR
- CC_APPROVER
- CC_RECONCILER
- CC_REVIEWER
- CC_USER_PO
- CC_USER_REQ
- ZD Purchasing Local Config Inq
- ZZ Purchasing Local Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

When adding a new card to the ctcLink system the following details are required:

1. A person to attach this new card to and a way to identify them in ctcLink (EMPLID, First Name, Last Name);
2. The card expiration date.

The following details are also recommended:

- A default distribution to assign to the card;
- People who should be Reviewers, Reconcilers or Approvers of this card (assuming you both will be Administrators for the card)

- ! Prior starting this process, all necessary security roles need to be applied to the appropriate user profile, such as **CC_REVIEWER**, **CC_RENCONCILER**, **CC_APPROVER** and **CC_ADMINISTRATOR**.

Adding a New Card to ctcLink

Navigation: Purchasing > Procurement Cards > Definitions > Cardholder Profile

< Card Data

Correct Errors

Correct Errors

☐ Display Unmasked Card Number

List of staged rows with errors

Q

1-1 of 1

View All

	Stage Error	Card Issuer	Card Number	Empl ID	Name
1					

Save

Notify

1. The **Cardholder Profile** page displays.
2. Enter **Search Criteria** to identify your cardholder.
3. Select **Search**.
4. If more than one cardholder matches your Search Criteria, the Search Results section of the page populates. Select the appropriate **Employee ID**.

- ! If unable to find an Employee ID name or number, please make sure the correct security roles have been assigned (such as: **CC_RECONCILER**).

[Correct Errors](#)

Cardholder Profile

Cardholder Profile

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

Find an Existing Value

Search Criteria

Employee ID

begins with

Name

begins with

Hayes, Xoan

Last Name

begins with

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All

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Employee ID	Name	Last Name
101007145	Hayes, Xoan	Hayes
101000241	Hayes, Xoan	Hayes

- The **Personal Data** tab displays.
- Select the **Card Data** tab.

[Correct Errors](#)

Cardholder Profile

Personal Data

Card Data

Name

Hayes, Xoan

Employee ID

101007145

Personnel Status

Employee

Telephone

Home Address

Country

USA United States

Address 1

Address 2

Address 3

City

TACOMA

County

State

WA Washington

Zip Code

98408

Mailing Address

Save

Return to Search

Previous in List

Next in List

Notify

Personal Data

Card Data

- The **Card Data** tab displays. Use it to display employee's profile as well as the cards attached to this particular employee under the Credit Card tab.

8. If there are no cards listed, new card information can be entered into the various **Card Data** fields.
 - a. Enter **Business Unit**.
 - b. Enter **Card Issuer** = "JPMC".
 - c. Enter **Card Number**.
 - d. Enter **Expiry Date**. This is a required field and it is for reporting and is designed to help you identify and track cards close to expiration. A future date (1/1/2222) can be entered in order to not micromanage data.
 - e. Enter **Card Type**.
 - f. **Date Issued** is required (must be prior to any transactions yet NOT back dated if at all possible).
 - g. Select the **Add a New Row [+]** icon to add additional cards.
9. Select the **Additional Information** tab.

The screenshot shows a web interface for managing credit cards. At the top, there's a header with a back arrow and 'Correct Errors' on the left, and the user's name 'Hayes, Xoan' on the right. Below this is a tabbed interface with 'Personal Data' and 'Card Data'. The 'Card Data' tab is active. Under 'Card Data', there's a sub-tabbed interface with 'Credit Card', 'Additional Information' (highlighted with a red box), 'Credit Limits', and 'Transaction Limits'. The 'Additional Information' sub-tab is active. Below the sub-tabs is a table with columns: *Business Unit, *Card Issuer, *Card Number, *Expiry Date, Card Type, and Date Issued. The first row contains data: WA220, JPMC, *****3000, 02/28/2018, Visa, and 08/22/2015. A red box highlights the '+-' icon at the end of the first row. Below the table is a red-outlined empty row for adding a new card. At the bottom, there are buttons: Save, Return to Search, Previous in List, Next in List, and Notify. The bottom left shows 'Personal Data | Card Data'.

10. The **Additional Information** tab displays.
11. Select the **Proxies** link.

Correct Errors Hayes, Xoon

Personal Data Card Data

Hayes, Xoon

☐ Display Unmasked Card Number

Card Data

1-1 of 1


Credit Card Additional Information Credit Limits Transaction Limits

*Business Unit	*Card Issuer	*Card Number	Supplier Card	Suppliers	Proxies	Default Distrib	Commodity Codes
WA220	JPMC	*****3000	<input type="checkbox"/>	Suppliers	Proxies	Default Distrib	Commodity Codes

Save Return to Search Previous in List Next in List Notify

Personal Data | Card Data

12. The **Assign Proxies** window is used to assign roles to various users for a specific card. After the new User ID has been entered into the appropriate field, the **Role** field will appear. The **Role** dropdown menu will reveal the appropriate roles for that specific User ID: Reviewer, Reconciler, Administrator and/or Approver.
13. Select the **Add a New Value [+]** icon to add additional lines if necessary.
14. Select **OK**.

 In the **Assign Proxies** screen, checking the 'Requester Default' or 'Buyer Default' boxes will automatically update the user's Requester or Buyer Setup profile to default to Override with the specific Procurement Card.

Assign Proxies

JPMC Card Number *****3000

Proxies

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*User ID	Description	*Role	Requester Default	Buyer Default
101007127	Julie Wells		<input type="checkbox"/>	<input type="checkbox"/>
101009217	River Barnes	Administrator	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel



The **Assign Proxies** screen and **Buyer/Requester Setup** pages are synchronized or 'linked' together.

Warning: If the default boxes are checked, new REQs or POs entered will override with the Procurement Card method. See example below:

Assign Proxies

USB Card Number *****7995

Proxies

*User ID	Description	*Role	Requester Default	Buyer Default		
1010	Christopher	Reconciler	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
1010	Gregory	Administrator	<input type="checkbox"/>	<input type="checkbox"/>	+	-

OK Cancel

Buyer Setup

Buyer 10101 Christopher *Status Active

Department SetID WA010 ShipTo SetID WA010 Location SetID WA010 PO Origin SetID WACTC

Department Ship To PE000000AP Location PE000000AP Origin ONL

Phone Fax

Default PO Status

☒ Open ☐ Pending Approval/Approved

PO Dispatch Signature Location:

Override with Procurement Card

Card Number *****7995 (VISA) Card Type Visa Expiration Date 06/30/2024

☒ Use Procurement Card as default payment method on Purchase Orders

Save Return to Search Notify Add Update/Display

Default Accounting Distribution

JPMC Card Number *****3000

Ship To

▼ Distribution Choices

☒ Use Single-Line Distribution

☐ Use Multi-Line Distribution

▼ Use Single-Line Distribution

Account Distribution

⌵ 🔍
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Distributions ⌵

*GL Unit	*Account	Oper Unit	Fund	Dept	Class	State Purpose	PC Bus Unit	Project	Activity	Source Type	Program
WA220	603010	7220	149	31000	064	N					

OK

Cancel

19. The **Default Accounting Distribution** window disappears.
20. Select **Save**.

← Correct Errors
Hayes, Xoan

Personal Data

Card Data

Hayes, Xoan

☐ Display Unmasked Card Number

Card Data

⌵ 🔍
⌵

Credit Card

Additional Information

Credit Limits

Transaction Limits

⌵

*Business Unit	*Card Issuer	*Card Number	Supplier Card	Suppliers	Proxies	Default Distrib	Commodity Codes
WA220	JPMC	*****3000	<input type="checkbox"/>	Suppliers	Proxies	Default Distrib	Commodity Codes

Save

Return to Search

Previous in List


Next in List

Notify

[Personal Data](#) | [Card Data](#)

21. Section complete.

Running the Load Statement Process

 Please refer to the QRG [Uploading Procurement Card \(P Card\) Statement](#) for further instructions.