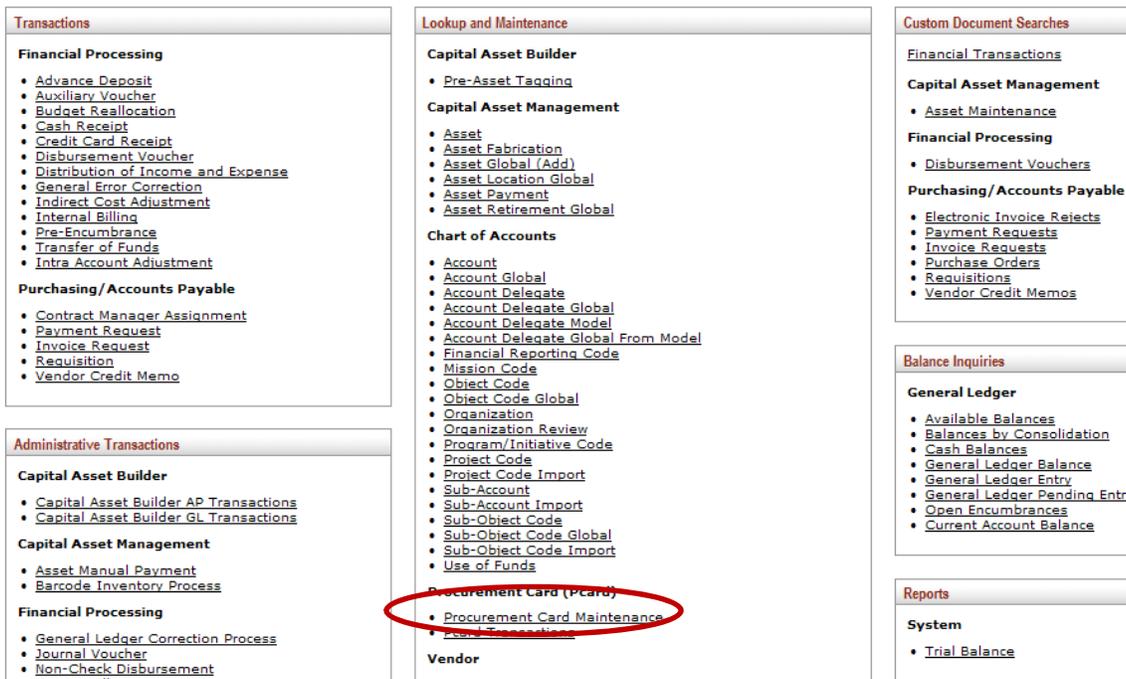


## PURCHASING

**Step 1:** To find the Procurement Card Maintenance Document (PCMD), you will first need to navigate to the portal. Go to [ebs.msu.edu](http://ebs.msu.edu) and enter your MSU NetID and password.

**Step 2:** Click on **Finance System**.

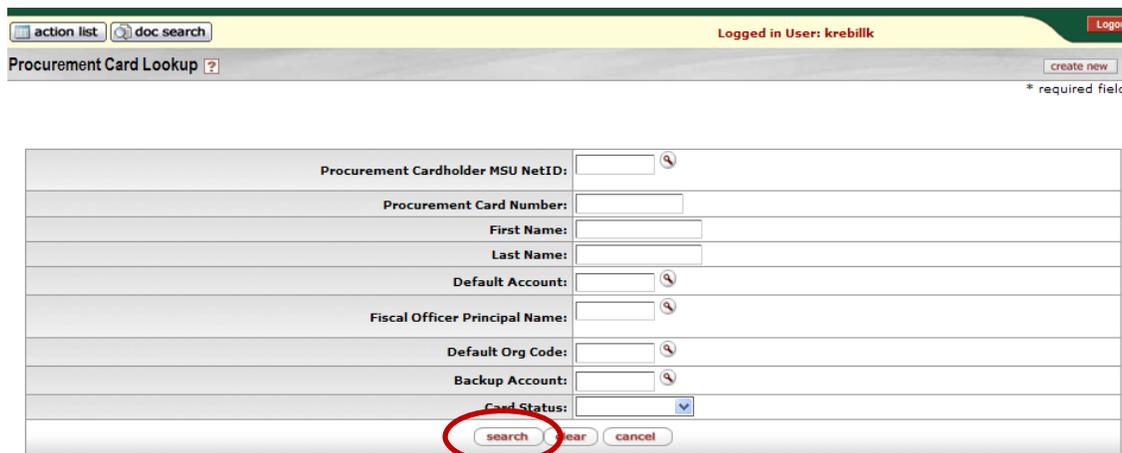
**Step 3:** Under the **Lookup and Maintenance** column (middle), click on **Procurement Card Maintenance** Link under the section titled **Procurement Card (Pcard)**.



The screenshot shows a navigation menu with three main columns:

- Transactions:**
  - Financial Processing
    - Advance Deposit
    - Auxiliary Voucher
    - Budget Reallocation
    - Cash Receipt
    - Credit Card Receipt
    - Disbursement Voucher
    - Distribution of Income and Expense
    - General Error Correction
    - Indirect Cost Adjustment
    - Internal Billing
    - Pre-Encumbrance
    - Transfer of Funds
    - Intra Account Adjustment
  - Purchasing/Accounts Payable
    - Contract Manager Assignment
    - Payment Request
    - Invoice Request
    - Requisition
    - Vendor Credit Memo
- Administrative Transactions:**
  - Capital Asset Builder
    - Capital Asset Builder AP Transactions
    - Capital Asset Builder GL Transactions
  - Capital Asset Management
    - Asset Manual Payment
    - Barcode Inventory Process
  - Financial Processing
    - General Ledger Correction Process
    - Journal Voucher
    - Non-Check Disbursement
- Lookup and Maintenance:**
  - Capital Asset Builder
    - Pre-Asset Tagging
  - Capital Asset Management
    - Asset
    - Asset Fabrication
    - Asset Global (Add)
    - Asset Location Global
    - Asset Payment
    - Asset Retirement Global
  - Chart of Accounts
    - Account
    - Account Global
    - Account Delegate
    - Account Delegate Global
    - Account Delegate Model
    - Account Delegate Global From Model
    - Financial Reporting Code
    - Mission Code
    - Object Code
    - Object Code Global
    - Organization
    - Organization Review
    - Program/Initiative Code
    - Project Code
    - Project Code Import
    - Sub-Account
    - Sub-Account Import
    - Sub-Object Code
    - Sub-Object Code Global
    - Sub-Object Code Import
    - Use of Funds
  - Procurement Card (Pcard)** (circled in red)
    - Procurement Card Maintenance** (circled in red)
    - Payment Transactions
  - Vendor
- Custom Document Searches:**
  - Financial Transactions
  - Capital Asset Management
    - Asset Maintenance
  - Financial Processing
    - Disbursement Vouchers
  - Purchasing/Accounts Payable
    - Electronic Invoice Rejects
    - Payment Requests
    - Invoice Requests
    - Purchase Orders
    - Requisitions
    - Vendor Credit Memos
- Balance Inquiries:**
  - General Ledger
    - Available Balances
    - Balances by Consolidation
    - Cash Balances
    - General Ledger Balance
    - General Ledger Entry
    - General Ledger Pending Entry
    - Open Encumbrances
    - Current Account Balance
- Reports:**
  - System
    - Trial Balance

**Step 4:** On the **Procurement Card Lookup** screen, search for the card you would like to edit. Search options include Pcardholder MSU NetID, Pcard Number, Pcardholder First Name and/or Last Name, Default Account, Default Fiscal Officer, Default Organization Code, Backup Account Number, and Card Status. You may search using any combination of these fields. Click **Search**.



The screenshot shows the 'Procurement Card Lookup' search interface. It includes a header with 'action list', 'doc search', 'Logged in User: krebillk', and 'Logout'. Below the header is a search form with the following fields:

- Procurement Cardholder MSU NetID:
- Procurement Card Number:
- First Name:
- Last Name:
- Default Account:
- Fiscal Officer Principal Name:
- Default Org Code:
- Backup Account:
- Card Status:

At the bottom of the form are three buttons: 'search', 'clear', and 'cancel'. The 'search' button is circled in red.

**Step 5:** Locate the card you would like to edit. Click **Edit** to the left of the search results.

Procurement Cardholder MSU NetID:

Procurement Card Number:

First Name:

Last Name:

Default Account:

Fiscal Officer Principal Name:

Default Org Code:

Backup Account:

Card Status:

One item retrieved.

Actions	Procurement Card Number	Cardholder Name	Procurement Cardholder MSU NetID	Default Org Code	Default Account	Fiscal Officer	Backup Account	Card Status	Card Cancel Sta
<input type="button" value="edit"/>	*****6893	Barnaby, Susan	barnaby	10074876	XT022914	Kokenakes, Kimberly		Active	

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

The Pcard Maintenance e-doc will open with old (current) information on the left and the new (editable) information listed on the right.

Document Overview

\* Description:  Explanation:

Org. Div. #:

MSU Procurement Cardholder Information

Procurement Cardholder MSU NetID:

First Name:  \*  
Middle Name:  \*  
Last Name:  \*

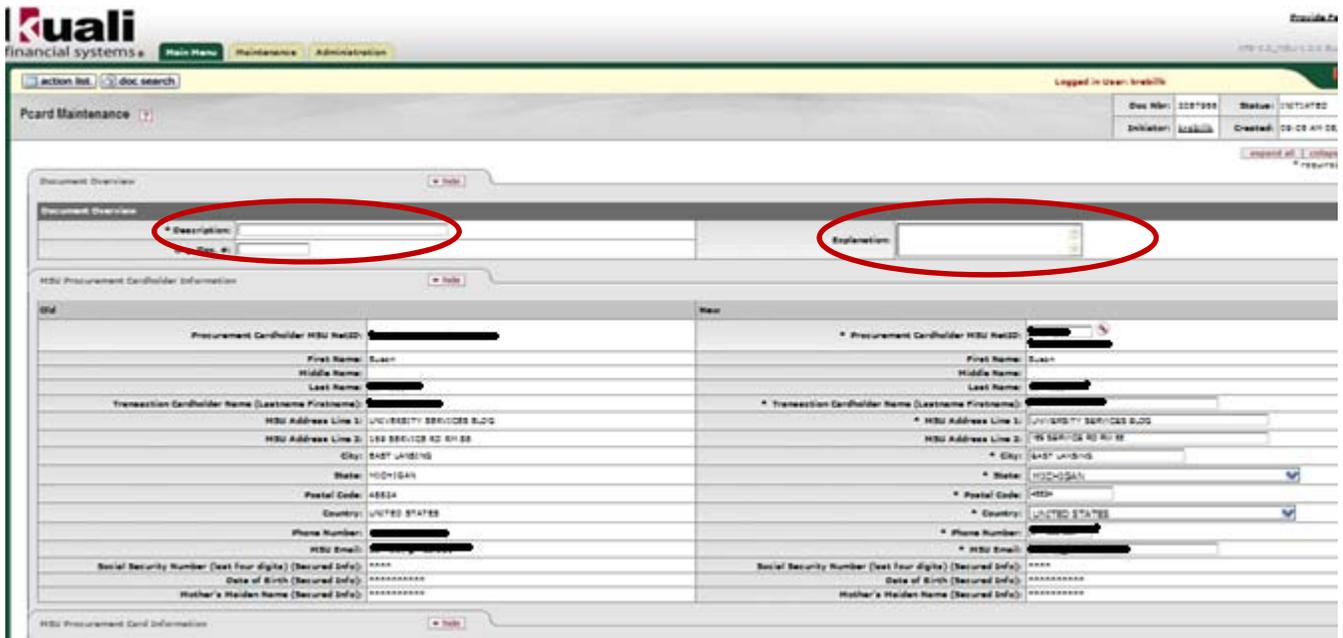
Transaction Cardholder Name (Lastname Firstname):  \*

MSU Address Line 1:  \*  
MSU Address Line 2:  \*  
City:  \*  
State:  \*  
Postal Code:  \*  
Country:  \*

Phone Number:  \*  
MSU Email:  \*

Social Security Number (last four digits) (Secured Info):  \*  
Date of Birth (Secured Info):  \*  
Mother's Maiden Name (Secured Info):  \*

**Step 6:** First, complete the **Description** and **Explanation** Fields. All the information on this tab is editable with the exception of the secure information (social security number, date of birth and mother's maiden name). Secure information is editable by the Pcardholder and the Pcard Administrators. Fields that can be changed/edited are indicated with editable text boxes/drop down lists. Reasons to edit a Pcard include changing the Pcardholder name, address\*, phone number, email address, default account and/or backup account number, change monthly spending limits, and/or cancel (or suspend) a Pcard. All changes will be marked with a yellow asterisk in the fields and tabs that contain changes. Please note: If you are initiating a time sensitive (immediate) change such as changing a monthly spending limit, or canceling/suspending a Pcard, contact the MSU Purchasing Pcard Team directly (517-884-6080) and follow up with changing the information in the Finance System.



\*Pcardholder addresses for the Procurement Card Maintenance (PCMD) are extracted from the MSU employee system of record address in the Human Resource application. If an edit is necessary, please contact your Unit Administrator to update the address information in the MSS tab in the EBS system (<http://ebs.msu.edu/HRPayroll/docs/BusAddressUpdate.pdf>).

### To Cancel or Suspend a Pcard

To cancel a Pcard, select the card status of **Cancel** from the drop-down list. You are required to complete the Card Cancel Reason, Cancel Effective Date, and Card Cancel Status. Card Cancel Status is the reason for canceling the Pcard; options are Closed, Lost/Stolen, Reissue, Suspended, and Terminated. Select the status that best describes the reason you are cancelling the card. Cancellation requests are routed to the default Fiscal Officer and the Pcard Administrators for approval. For urgent requests, contact the Pcard Administrators immediately.

* Card Status:	Active
Card Cancel Reason:	<div style="border: 1px solid gray; padding: 2px;"> Active  <b>Cancel</b>  Pending Card </div>
Cancel Effective Date:	<input type="text"/>
Card Cancel Status:	<input type="text"/>

To suspend a Pcard, leave the Card Status as **Active**, Card Cancel Reason should include the reason you are suspending the card including dates to and from (if known), Cancel Effective Date (the date you want the suspension to begin), at the Card Cancel Status drop-down list, please select **Suspended**. A second PCMD will need to be submitted to unsuspend the card. Click **Submit** to process the PCMD.

* Card Status:	Active
Card Cancel Reason:	<input type="text"/>
Cancel Effective Date:	<input type="text"/>
Card Cancel Status:	<div style="border: 1px solid gray; padding: 2px;"> Closed  Lost/Stolen  Reissue  <b>Suspended</b>  Terminated </div>

## **Routing**

A PCMD requesting an account # change involving a CGA account must be ad hoc routed to the CGA office prior to submitting to the Pcard Administrator. When a card is edited, with the exception of changing the Card Status to Cancel, the e-doc will route to the Pcardholder, default account Fiscal Officer and Pcard Administrator for approval.

**Please Note:** Requests made via the Pcard Maintenance table will not be changed with the bank until the Pcard Administrators have approved the e-doc. The Pcardholder and default account Fiscal Officer will receive an FYI once the Pcard Administrators approve the PCMD for notification that the request was completed.