

PROCUREMENT CARD MASTER TRAINING MANUAL

The Card Master is a database residing in SAP and contains cardholder and card information for University of Kentucky procurement cards. It is designed to provide information that will help the end user place orders, control access to review, edit, and approve cardholder transactions, reconcile ledger sheets, and keep track of cards in your area. To access information in this database, one or more of the following SAP transactions can be used.

I. ZMM_PROCARD_SEARCH

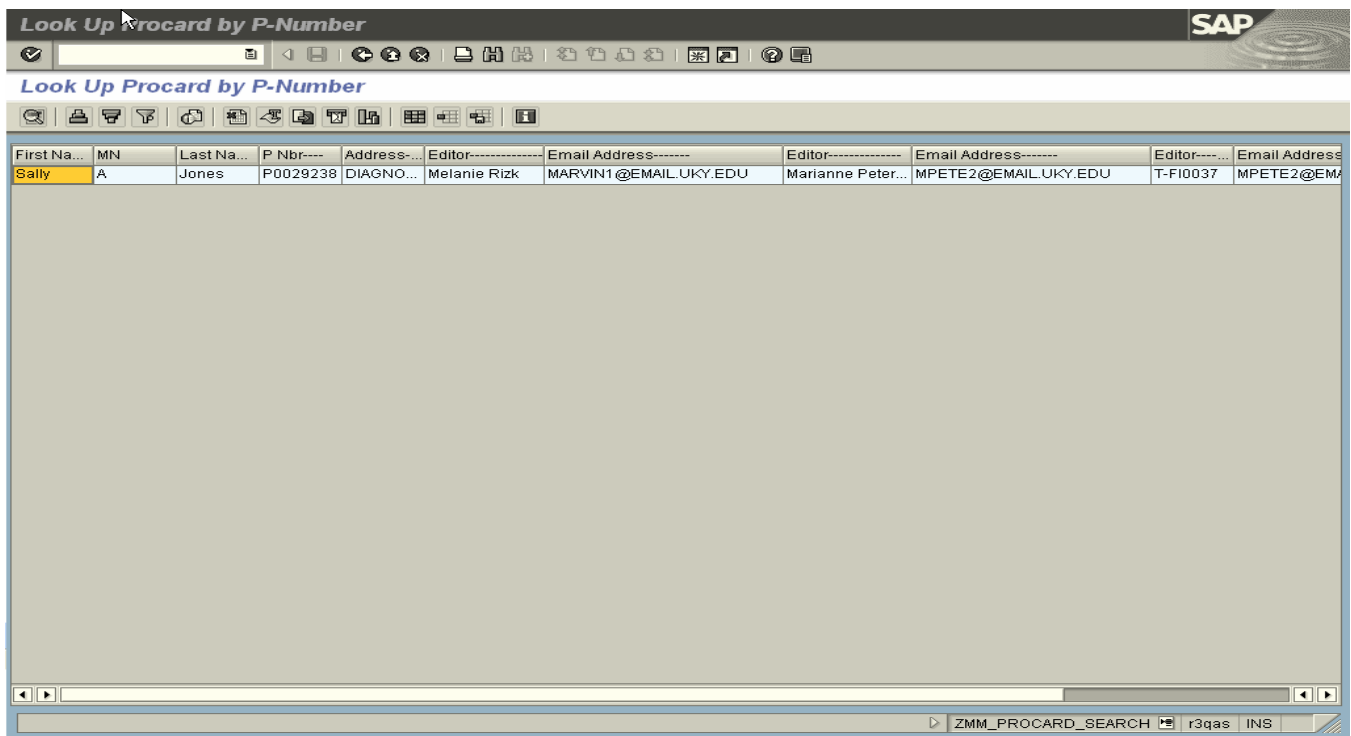
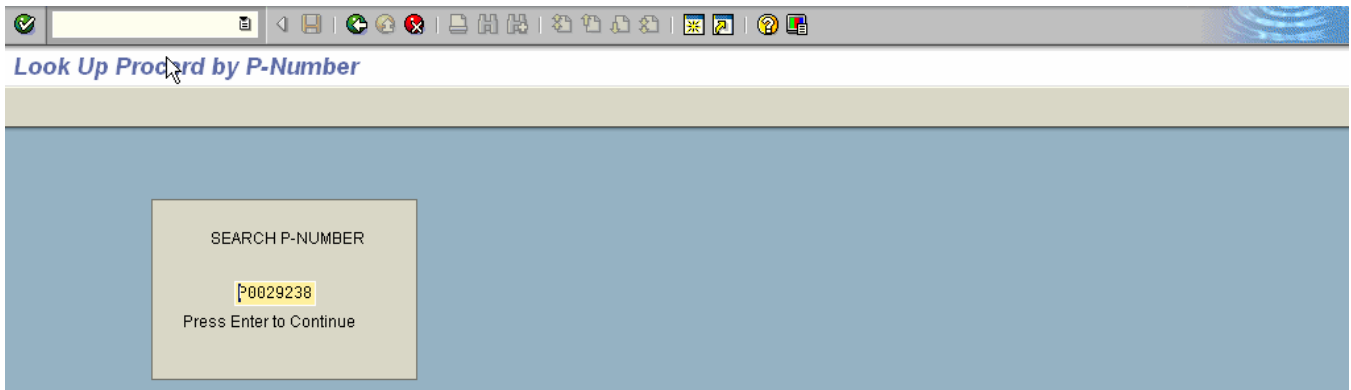
Use this transaction to search for the name of a procurement cardholder and the corresponding editor names and email addresses.

Step 1 – In the control box, type ZMM_PROCARD_SEARCH



Step 2 – Type in the P number and press Enter or click on the green check circle at the top left of the screen.

NOTE – To leave this screen without entering a P Number, type anything in the P number box and then click the green back arrow button.



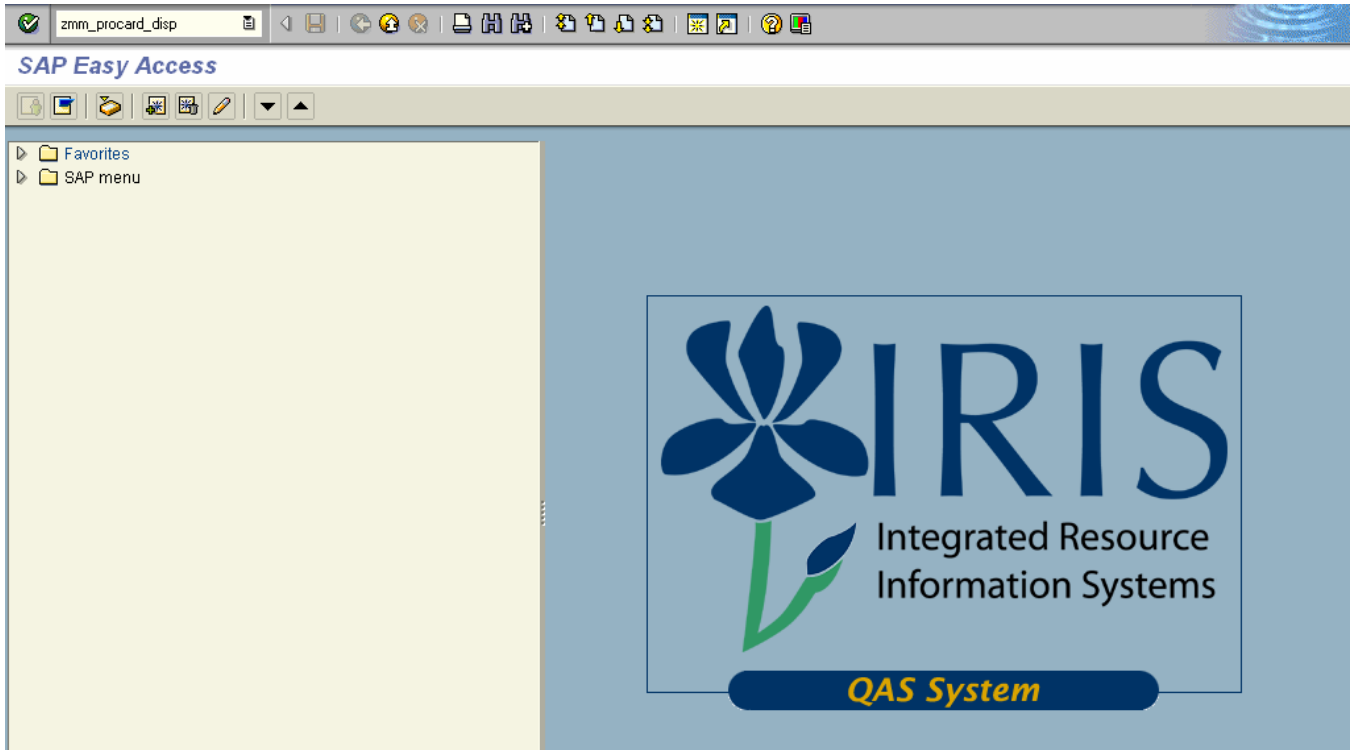
Step 3 – To search for another card, click on the back arrow button and repeat Steps 1 and 2.

Step 4 – To exit the screen, click on the green back arrow button twice.

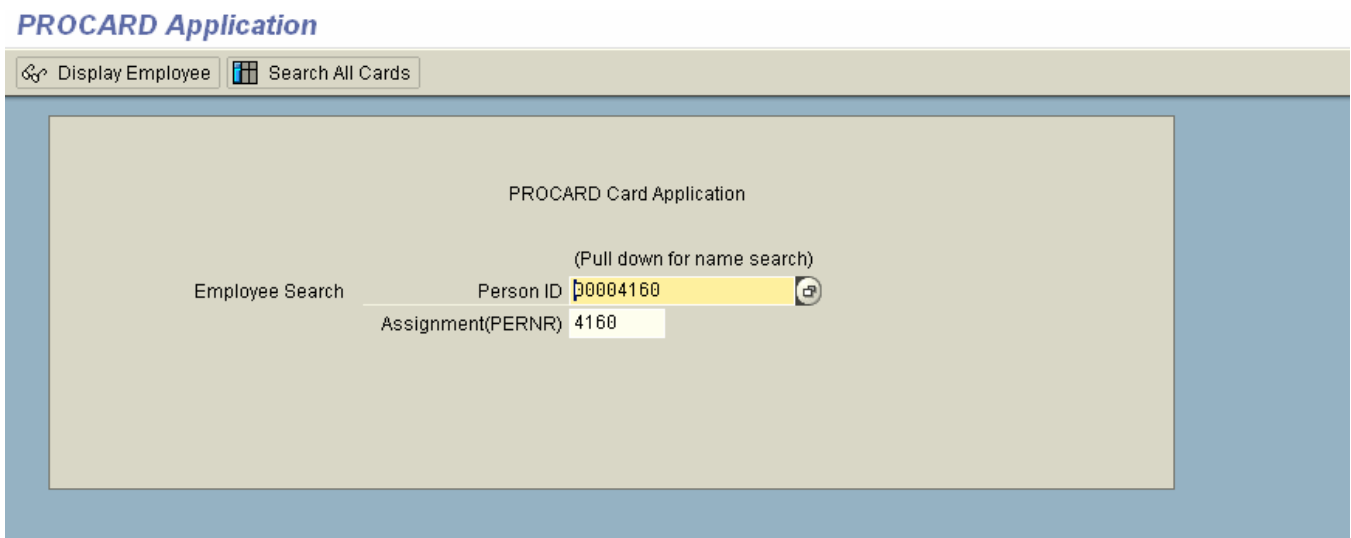
II. ZMM_PROCARD_DISP

Use this transaction to display cardholder and card information. Only cards assigned to employees in your organizational unit (as defined in HR) will be displayed.

Step 1 – In the control box, type ZMM_PROCARD_DISP




Step 2 – Enter the Person ID and Assignment (PERNR)



Step 3 – Click on  Display Employee

PROCARD Application - Employee Data -

 List Existing PROCARDS

PROCARD Card Application

External Person ID

Assignment(PERNR)

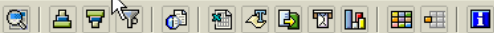
Name

Organ.Unit

Work Phone Email Address

Step 4 – Click on  List Existing PROCARDS


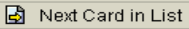
PROCARD Application - Employee Data -



Person ID--	PERNR--	First Na...	MN	Last Na...	P Nbr----	Org.Unit	Address--...	Editor-----	Editor-----	Editor----...	Email Address-----
00004160	00004160	Helen	Y	Boyd	P5143624	7H000	COM DE...	Lori Mashburn	Marianne Peter...	T-FI0037	HYBOYD2@EMAIL.UKY.EDU

Step 5 - To display card information in a record format, click on the P number.

PROCARD Application Data Entry

PROCARD Application Entry

Person ID	00004160	Helen	Y	Boyd
Assgnmt(PERNR)	4160	Email Address	HYBOYD2@EMAIL.UKY.EDU	
Company Code	UK00			
Street Address	COM DEANS OFFICE	Organization Unit	7H000	
Street Addr 2	MN150 MED SCI BLDG	Cost Object	1012000860	
City	LEXINGTON	Secondary Cost Object		
State	KY	G/L account	540348	
Zip Code	405360298			
		P-Number	Spending Limits	
		P5143624	Single Transaction Limit \$ 5,000.00	
Second Row Embossing	COM DEANS OFFICE	Transactions per Day Limit 99		
		Monthly Expenditure Limit \$ 10,000.00		
		Transactions per Month Limit 99		
Card Status	A	Authorizations		
Termination Reason		Airline Tickets <input type="checkbox"/>		
		Auto rental <input type="checkbox"/>		
		Hotel Lodging <input type="checkbox"/>		
Approving Supervisor's Name	Trish Polly	Approving Dean/admin officer	TRISH POLLY	
Approving Supervisor Email	PTPOLL00@EMAIL.UKY.EDU	Dean's Email	PTPOLL00@EMAIL.UKY.EDU	
Editor's ID	LRICH1	Lori Mashburn	LRICH1@EMAIL.UKY.EDU	
Editor 2 ID	MPETE2	Marianne Peterson	MPETE2@EMAIL.UKY.EDU	
Editor 3 ID	T-FI0037	T-FI0037	MPETE2@EMAIL.UKY.EDU	

NOTES:

Step 6 - To see another record, click on  or 

Step 7 - To leave the transaction, click on the green back arrow button twice and then click on the yellow exit arrow button.

Alternative Process

If you are unsure of the Person ID and PERNR or you wish to display all cards in your organizational unit, do the following:

Step 1 – Click on Search All Cards

PROCARD Application

Display Employee Search All Cards

PROCARD Card Application

(Pull down for name search)

Employee Search Person ID

Assignment(PERNR)

Step 2 - Press enter when the info box appears to bypass it

PROCARD Application

Display Employee Search All Cards

PROCARD Card Application

(Pull down for name search)

Employee Search Person ID

Assignment(PERNR)

Information

i You must enter an ID

✓ ?

Step 3 - Enter your search criteria
 NOTE: You must enter at least the Company Code

Search All Procards

Search All Cards

SELECTION CRITERIA

Company Code

Org. Unit to

Card Number to

P Number to

Cost Object to

Card Status (A)ctive,(P)ending,(S)uspended,(T)ermin


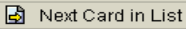
Step 4 - Press enter or Click on Search All Cards

Search All Procards

Person ID--	PERNR--	First Na...	MN	Last Na...	P Nbr---	Org.Unit	Address--	Editor-----	Editor-----	Editor----	Email Address-----
00004160	00004160	Helen	Y	Boyd	<u>P5143624</u>	7H000	COM DE...	Lori Mashburn	Marianne Peter...	T-FI0037	HYBOYD2@EMAIL.UKY.EDU
00007142	00007142	Lorene		Richards...	<u>P0681804</u>	7H000	COLL O...				LRICH1@UKY.EDU
	00047490	Jason	T	Mitchell	<u>P5461198</u>	7H000	COM DE...	Lori Mashburn	Lori Mashburn	Trish Polly	
	00049311	Jay	A	Perman	<u>P7448250</u>	7H000	COLL O...	Lori Mashburn	Lori Mashburn	Kristine ...	
	00049311	Jay	A	Perman	<u>P7448250</u>	7H000	COLL O...	Lori Mashburn	Lori Mashburn	Kristine ...	JAPERM2@UKY.EDU
	00047490	Jason	T	Mitchell	<u>P5461198</u>	7H000	COM DE...	Lori Mashburn	Lori Mashburn	Trish Polly	JMITC5@EMAIL.UKY.EDU

Step 5 - To display card information in a record format, click on the P number.

PROCARD Application Data Entry

PROCARD Application Entry

Person ID	00004160	Helen	Y	Boyd
Assgnmt(PERNR)	4160	Email Address	HYBOYD2@EMAIL.UKY.EDU	
Company Code	UK00			
Street Address	COM DEANS OFFICE	Organization Unit	7H000	
Street Addr 2	MN150 MED SCI BLDG	Cost Object	1012000860	
City	LEXINGTON	Secondary Cost Object		
State	KY	G/L account	540348	
Zip Code	405360298			
		P-Number	P5143624	
Second Row Embossing	COM DEANS OFFICE			
		Spending Limits		
		Single Transaction Limit \$	5,000.00	
		Transactions per Day Limit	99	
		Monthly Expenditure Limit \$	10,000.00	
		Transactions per Month Limit	99	
Card Status	A	Authorizations		
Termination Reason		Airline Tickets	<input type="checkbox"/>	
		Auto rental	<input type="checkbox"/>	
		Hotel Lodging	<input type="checkbox"/>	
Approving Supervisor's Name	Trish Polly	Approving Dean/admin officer	TRISH POLLY	
Approving Supervisor Email	PTPOLL00@EMAIL.UKY.EDU	Dean's Email	PTPOLL00@EMAIL.UKY.EDU	
Editor's ID	LRICH1	Lori Mashburn	LRICH1@EMAIL.UKY.EDU	
Editor 2 ID	MPETE2	Marianne Peterson	MPETE2@EMAIL.UKY.EDU	
Editor 3 ID	T-FI0037	T-FI0037	MPETE2@EMAIL.UKY.EDU	

NOTES:

Step 6 - To see another record, click on  or 

Step 7 - To leave the transaction, click on the green back arrow button twice and then click on the yellow exit arrow button.

III. ZMM_PROCARD_UPDATE

This transaction provides administrative personnel access to display cardholder and card information for their unit/college/division. In addition, it is used to update those individuals who have authority to review, edit, and post a procurement cardholder's transactions.

Only users that have been given approval by the Business/Budget Officer or other Administrative Officer will be given access to this transaction. Request to be added should be sent to the Procurement Card Administrator at procard@email.uky.edu.

Step 1 – In the control box, type ZMM_PROCARD_UPDATE



Step 2 – Enter the Person ID and Assignment (PERNR)

PROCARD Application

Display Employee

Search All Cards

PROCARD Card Application

(Pull down for name search)

Employee Search


Person ID 00004160



Assignment(PERNR) 4160

Step 3 – Click on  Display Employee

PROCARD Application - Employee Data -

 List Existing PROCARDS

PROCARD Card Application

External Person ID


Assignment(PERNR)

Name

Organ.Unit

Work Phone Email Address


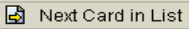
Step 4 – Click on  List Existing PROCARDS

 Search All Procards

Person ID--	PERNR--	First Na...	MN	Last Na...	P Nbr----	Org.Unit	Address--	Editor-----	Editor-----	Editor----	Email Address-----
00000106	00000106	Alexander	G	Rabchev...	P0025210	7H016	SCOBIRC	Melanie Rizk	Marianne Peter...	T-FI0037	AGRAB@EMAIL.UKY.ED
00000115	00000115	Alfred	B	Young	P0682869	7H853	SURGE...				BYOUN1@EMAIL.UKY.E
00000146	00000146	Alicia	Jill	Colliver	P4025454	7H025	MARKEY...				ALICIA.COLLIVER@UKY
00000189	00000189	Alyson	H	Gibson	P8683388	7H025	MARKEY...				AHGIBS2@EMAIL.UKY.E
00000232	00000232	Amy	Lynn	Christian	P0028891	7H023	APPALA...	Melanie Rizk	Marianne Peter...	T-FI0037	
00000309	00000309	Andrew	R	Pulito	P0032257	7H857	SURGE...				ARPULI@EMAIL.UKY.ED
00000346	00000346	Angela		Schuma...	P5680513	7H100	ANATOM...				ASCHU3@EMAIL.UKY.E
00000445	00000445	Anna	K	Rockich	P0036019	7H850	SURGE...				AROCKICH@EMAIL.UKY
00000465	00000465	Annadora		Bruce-K...	P0080122	7H081	ANATOM...				ABRUCE@EMAIL.UKY.E
00000615	00000615	Avalon		Sandoval	P0358947	7H100	ANATOM...				ASAND1@EMAIL.UKY.EI
00000653	00000653	Barbara	T	Isaac	P0424528	7H600	PATHOL...				BISAAC@EMAIL.UKY.ED
00000923	00000923	Bintao		Pan	P0036001	7H853	SURGE...				BTPAN@POP.UKY.EDU
00001012	00001012	Brenda	J	Smith	P1065271	7H060	UK CTR ...				BJSMITH@EMAIL.UKY.E
00001050	00001050	Brenda	G	Ingram	P8578563	7H950	PHYSIC...				BGINGR2@EMAIL.UKY.E
00001105	00001105	Brian	R	MacPher...	P0766308	7H100	ANATOM...				BRIAN.MACPERSON@
00001117	00001117	Brian	A	Jackson	P0028941	7H750	PHYSIO...				JACKSON@EMAIL.UKY.I
00001257	00001257	Carol	F	Swiderski	P2465381	7H360	INTERN...				CAROLSWIDERSKI@UK

Step 5 - To display card information in a record format, click on the P number.

PROCARD Application Data Entry

PROCARD Application Entry

Person ID	00004160	Helen	Y	Boyd
Assgnmt(PERNR)	4160	Email Address	HYBOYD2@EMAIL.UKY.EDU	
Company Code	UK00			
Street Address	COM DEANS OFFICE	Organization Unit	7H000	
Street Addr 2	MN150 MED SCI BLDG	Cost Object	1012000860	
City	LEXINGTON	Secondary Cost Object		
State	KY	G/L account	540348	
Zip Code	405360298			
P-Number		Spending Limits		
P5143624		Single Transaction Limit \$	5,000.00	
Second Row Embossing	COM DEANS OFFICE	Transactions per Day Limit	99	
		Monthly Expenditure Limit \$	10,000.00	
		Transactions per Month Limit	99	
Card Status	A	Authorizations		
Termination Reason		Airline Tickets	<input type="checkbox"/>	
		Auto rental	<input type="checkbox"/>	
		Hotel Lodging	<input type="checkbox"/>	
Approving Supervisor's Name	Trish Polly	Approving Dean/admin officer	TRISH POLLY	
Approving Supervisor Email	PTPOLL00@EMAIL.UKY.EDU	Dean's Email	PTPOLL00@EMAIL.UKY.EDU	
Editor's ID	LRICH1	Lori Mashburn	LRICH1@EMAIL.UKY.EDU	
Editor 2 ID	MPETE2	Marianne Peterson	MPETE2@EMAIL.UKY.EDU	
Editor 3 ID	T-FI0037	T-FI0037	MPETE2@EMAIL.UKY.EDU	

NOTES:

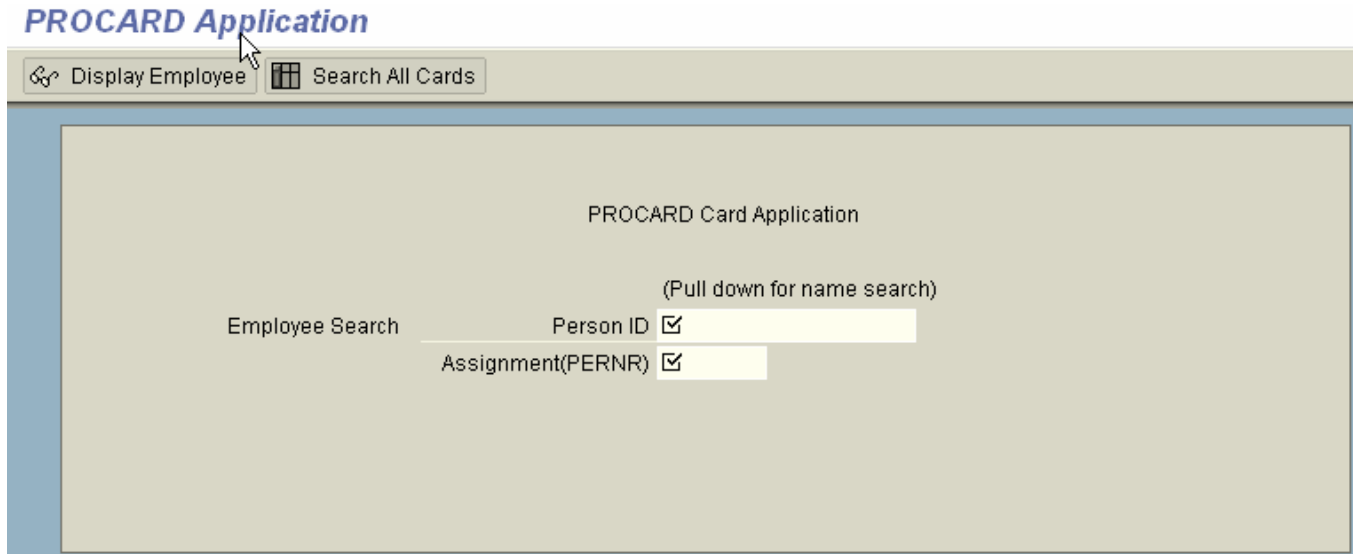
Step 6 - To see another record, click on  or 

Step 7 - To leave the transaction, click on the green back arrow button twice and then click on the yellow exit arrow button.

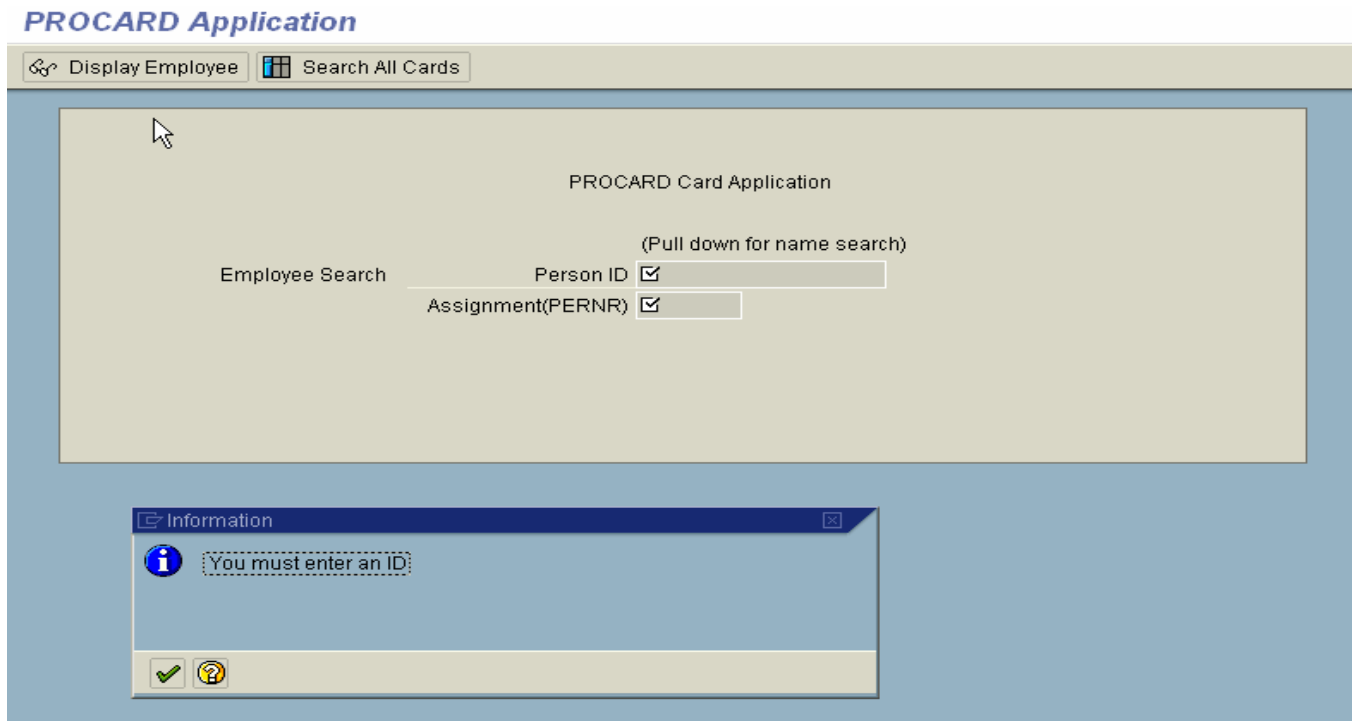
Alternative Process

If you are unsure of the Person ID and PERNR or you wish to display all cards in your organizational unit, do the following:

Step 1 – Click on Search All Cards

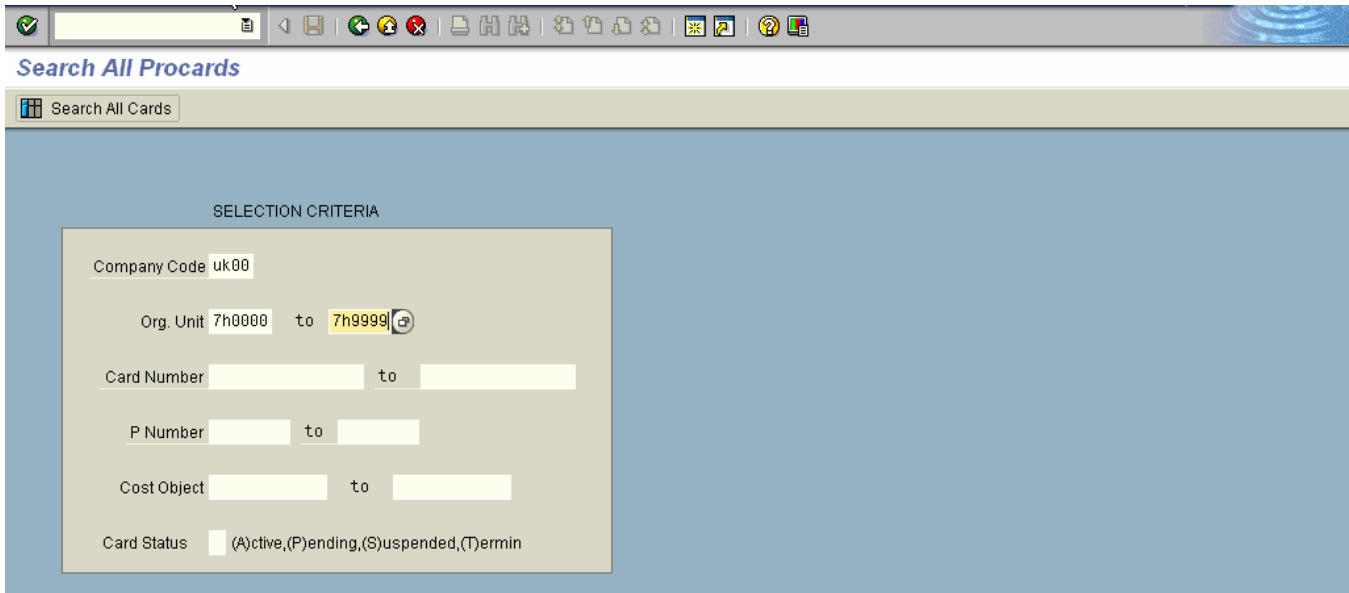


Step 2 - Press enter when the info box appears to bypass it



Step 3 - Enter your search criteria

NOTE: You must enter the Company Code and one other search criteria.



Search All Procards

Search All Cards

SELECTION CRITERIA

Company Code

Org. Unit to

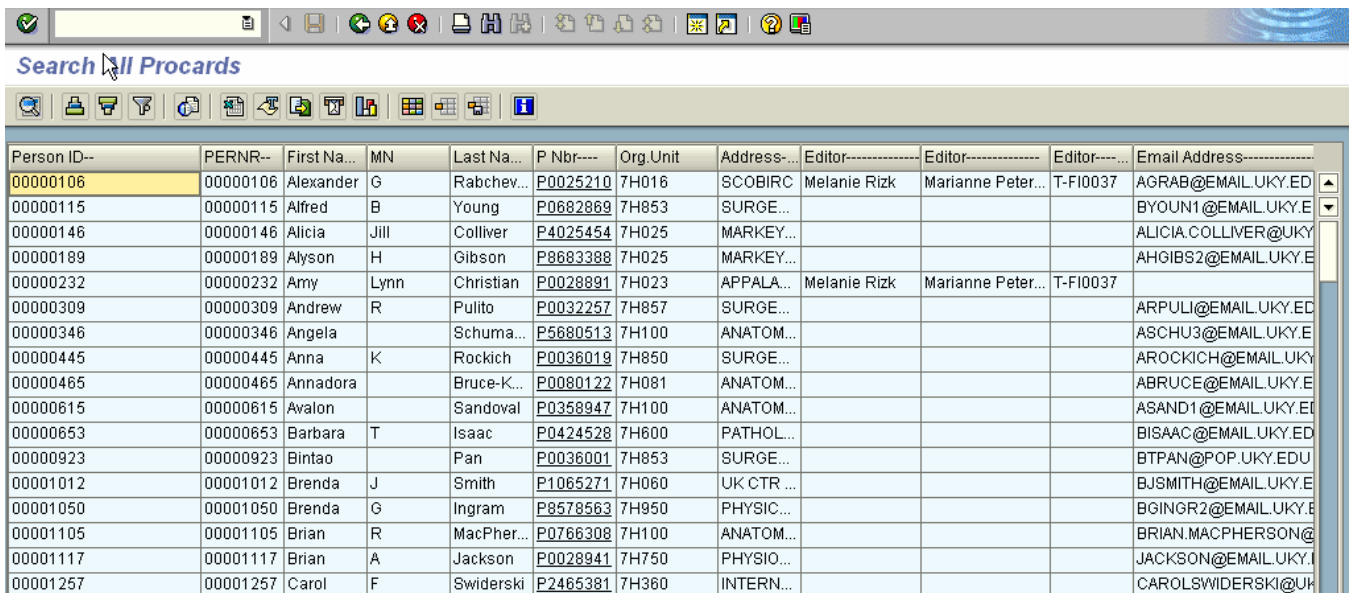
Card Number to

P Number to

Cost Object to

Card Status (A)ctive, (P)ending, (S)uspended, (T)ermin

Step 4 - Press enter or Click on Search All Cards

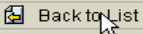
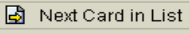


Search All Procards

Person ID--	PERNR--	First Na...	MN	Last Na...	P Nbr----	Org.Unit	Address--...	Editor-----	Editor-----	Editor----	Email Address-----
00000106	00000106	Alexander	G	Rabchev...	P0025210	7H016	SCOBIRC	Melanie Rizk	Marianne Peter...	T-FI0037	AGRAB@EMAIL.UKY.ED
00000115	00000115	Alfred	B	Young	P0682869	7H853	SURGE...				BYOUN1@EMAIL.UKY.E
00000146	00000146	Alicia	Jill	Colliver	P4025454	7H025	MARKEY...				ALICIA.COLLIVER@UKY
00000189	00000189	Alyson	H	Gibson	P8683388	7H025	MARKEY...				AHGIBS2@EMAIL.UKY.E
00000232	00000232	Amy	Lynn	Christian	P0028891	7H023	APPALA...	Melanie Rizk	Marianne Peter...	T-FI0037	
00000309	00000309	Andrew	R	Pulito	P0032257	7H857	SURGE...				ARPULI@EMAIL.UKY.ED
00000346	00000346	Angela		Schuma...	P5680513	7H100	ANATOM...				ASCHU3@EMAIL.UKY.E
00000445	00000445	Anna	K	Rockich	P0036019	7H850	SURGE...				AROCKICH@EMAIL.UKY
00000465	00000465	Annadora		Bruce-K...	P0080122	7H081	ANATOM...				ABRUCE@EMAIL.UKY.E
00000615	00000615	Avalon		Sandoval	P0358947	7H100	ANATOM...				ASAND1@EMAIL.UKY.ED
00000653	00000653	Barbara	T	Isaac	P0424528	7H600	PATHOL...				BISAAC@EMAIL.UKY.ED
00000923	00000923	Bintao		Pan	P0036001	7H853	SURGE...				BTPAN@POP.UKY.EDU
00001012	00001012	Brenda	J	Smith	P1065271	7H060	UK CTR ...				BJSMITH@EMAIL.UKY.E
00001050	00001050	Brenda	G	Ingram	P8578563	7H950	PHYSIC...				BGINGR2@EMAIL.UKY.E
00001105	00001105	Brian	R	MacPher...	P0766308	7H100	ANATOM...				BRIAN.MACPHERSON@
00001117	00001117	Brian	A	Jackson	P0028941	7H750	PHYSIO...				JACKSON@EMAIL.UKY.I
00001257	00001257	Carol	F	Swiderski	P2465381	7H360	INTERN...				CAROLSWIDERSKI@UK

Step 5 - To display card information in a record format, click on the P number.

PROCARD Application Data Entry

PROCARD Application Entry

Person ID	00004160	Helen	Y	Boyd
Assgnmt(PERNR)	4160	Email Address	HYBOYD2@EMAIL.UKY.EDU	
Company Code	UK00			
Street Address	COM DEANS OFFICE	Organization Unit	7H000	
Street Addr 2	MN150 MED SCI BLDG	Cost Object	1012000860	
City	LEXINGTON	Secondary Cost Object		
State	KY	G/L account	540348	
Zip Code	405360298			
P-Number		Spending Limits		
P5143624		Single Transaction Limit \$	5,000.00	
Second Row Embossing	COM DEANS OFFICE	Transactions per Day Limit	99	
		Monthly Expenditure Limit \$	10,000.00	
		Transactions per Month Limit	99	
Card Status	A	Authorizations		
Termination Reason		Airline Tickets	<input type="checkbox"/>	
		Auto rental	<input type="checkbox"/>	
		Hotel Lodging	<input type="checkbox"/>	
Approving Supervisor's Name	Trish Polly	Approving Dean/admin officer	TRISH POLLY	
Approving Supervisor Email	PTPOLL00@EMAIL.UKY.EDU	Dean's Email	PTPOLL00@EMAIL.UKY.EDU	
Editor's ID	LRICH1	Lori Mashburn	Editor's Email	LRICH1@EMAIL.UKY.EDU
Editor 2 ID	MPETE2	Marianne Peterson	Editor's Email	MPETE2@EMAIL.UKY.EDU
Editor 3 ID	T-FI0037	T-FI0037	Editor's Email	MPETE2@EMAIL.UKY.EDU

NOTES:

Step 6 - To see another record, click on  or 

Step 7 - To leave the transaction, click on the green back arrow button twice and then click on the yellow exit arrow button.

To Change Editor IDs

Step 1 – Do Steps 1 through 5 as shown above.

PROCARD Application Data Entry

Back to List Next Card in List Update Card Disp Change History

PROCARD Application Entry

Person ID	00004119	Hatim	Omar
Assgmt(PERNR)	4119	Email Address	HATIM.OMAR@UKY.EDU
Company Code	UK00		
Street Address	MEDICINE/PEDIATRICS YPP	Organization Unit	7H657
Street Addr 2	"RM J453, KY CLINIC"	Cost Object	1013197630
City	LEXINGTON	Secondary Cost Object	
State	KY	G/L account	540348
Zip Code	405360284		
	P-Number	Spending Limits	
	P0203203	Single Transaction Limit \$	5,000.00
Second Row Embossing	MEDICINE/PEDIATRICS YPP	Transactions per Day Limit	99
		Monthly Expenditure Limit \$	5,000.00
		Transactions per Month Limit	99
Card Status	A	Authorizations	
Termination Reason		Airline Tickets	<input type="checkbox"/>
		Auto rental	<input type="checkbox"/>
		Hotel Lodging	<input type="checkbox"/>
Approving Supervisor's Name	Jill Lowry	Approving Dean/admin officer	JILL LOWRY
Approving Supervisor Email	JILL.LOWRY@EMAIL.UKY.EDU	Dean's Email	JILL.LOWRY@EMAIL.UKY.EDU
Editor's ID	MARVIN1	Editor's Email	MARVIN1@EMAIL.UKY.EDU
Editor 2 ID	MPETE2		MPETE2@EMAIL.UKY.EDU
Editor 3 ID	T-FI0037		MPETE2@EMAIL.UKY.EDU

NOTES:

Step 2 - Place your cursor in the box that displays the Editor ID you wish to change.

Step 3 – Enter the new ID and press Enter.

PROCARD Application Data Entry


Back to List Next Card in List Update Card Disp Change History

PROCARD Application Entry

Person ID	00004119	Hatim	Omar
Assgmt(PERNR)	4119	Email Address HATIM.OMAR@UKY.EDU	
Company Code	UK00		
Street Address	MEDICINE/PEDIATRICS YPP	Organization Unit	7H657
Street Addr 2	"RM J453, KY CLINIC"	Cost Object	1013197630
City	LEXINGTON	Secondary Cost Object	
State	KY	G/L account	540348
Zip Code	405360284		
P-Number		Spending Limits	
P0203203		Single Transaction Limit \$	5,000.00
Second Row Embossing	MEDICINE/PEDIATRICS YPP	Transactions per Day Limit	99
		Monthly Expenditure Limit \$	5,000.00
		Transactions per Month Limit	99
Card Status	A	Authorizations	
Termination Reason		Airline Tickets <input type="checkbox"/>	
		Auto rental <input type="checkbox"/>	
		Hotel Lodging <input type="checkbox"/>	
Approving Supervisor's Name	Jill Lowry	Approving Dean/admin officer	JILL LOWRY
Approving Supervisor Email	JILL.LOWRY@EMAIL.UKY.EDU	Dean's Email	JILL.LOWRY@EMAIL.UKY.EDU
Editor's ID	MARVIN1	Editor's Email	marvin1@email.uky.edu
Editor 2 ID	MPETE2		mpete2@email.uky.edu
Editor 3 ID	CJNELS0		cjnel0@email.uky.edu

NOTES:

The new ID, associated name and email address will populate in the appropriate boxes.

Step 4 – Click on . An Info box will appear.

PROCARD Application Data Entry

Back to List Next Card in List Update Card Disp Change History

PROCARD Application Entry

Person ID 00004119 Hatim Omar
Assgmt(PERNR) 4119 Email Address HATIM.OMAR@UKY.EDU
Company Code UK00
Street Address MEDICINE/PEDIATRICS YPP Organization Unit 7H657
Street Addr 2 "RM J453, KY CLINIC" Cost Object 1013197630
City LEXINGTON Secondary Cost Object
State KY G/L account 540348
Zip Code 405360284

P-Number P0203203
Spending Limits
Single Transaction Limit \$ 5,000.00
Transactions per Day Limit 99
Second Row Embossing MEDICINE/PEDIATRICS YPP
Expenditure Limit \$ 5,000.00
Transactions per Month Limit 99

Information
Procurement Master was updated:

Approving Supervisor's Name Jill Lowry Approving Dean/admin officer JILL LOWRY
Approving Supervisor Email JILL.LOWRY@EMAIL.UKY.EDU Dean's Email JILL.LOWRY@EMAIL.UKY.EDU
Editor's ID MARVIN1 Melanie Rizk Editor's Email MARVIN1@EMAIL.UKY.EDU
Editor 2 ID MPETE2 Marianne Peterson MPETE2@EMAIL.UKY.EDU
Editor 3 ID CJNELSO Cara Bischoff CJNELSO@EMAIL.UKY.EDU

NOTES:

Step 5 – Press Enter or click the green check box.

Step 6 – To change the Editor IDs on another card, click on  or .

Step 7 – To leave the transaction, click on the green back arrow button and then the yellow exit arrow button.

All other changes must be completed by the Procurement Card Administrator at procard@email.uky.edu.

SUMMARY OF CARD MASTER TRANSACTIONS

ZMM_PROCARD_SEARCH

Use this transaction to search for the name of a procurement cardholder and the corresponding editor names and email addresses.

ZMM_PROCARD_DISP

Use this transaction to display cardholder and card information. Only cards assigned to employees in your organizational unit (as defined in HR) will be displayed.

ZMM_PROCARD_UPDATE

This transaction provides administrative personnel access to display cardholder and card information for their unit/college/division. In addition, it is used to update those individuals who have authority to review, edit, and post a procurement cardholder's transactions.