

Completing the PCA Details Tab

A PCard approver is responsible for viewing and approving transactions for PCard holders. This Addy Note explains how to add or inactivate PCard holders to/from the list of employees a PCard approver can view and approve.

Adding a PCard Holder to the PCA Details Tab

Step	Action
1.	Navigate to: Main Menu > Departmental Authorization > Employee Information.
	Employee Information Entry evinformation versions and click Search. Leave fields blank for a list of all values.
	Find an Existing Value Add a New Value
	▼ Search Criteria
	Search by: Empl ID v begins with
	Search Advanced Search
2.	To begin a PCard holder search, click the down arrow in the Search by field.
	▼ Search Criteria
	Search by: Empl ID egins with
	Search Advanced Search



Step	Action
3.	Select the necessary Search by criteria from the drop-down list.
	Search by: Empl ID begins Empl ID Fint Home Search Name h
4.	Complete the empty Search by field based on your search criteria.
	Search Criteria Search by: Last Name begins with Search Advanced Search
5.	Click Search.
	▼ Search Criteria Search by: Last Name ▼ begins with Jones Search dvanced Search
6.	Select an employee from the search results.



 7. Click the PCA Details tab. Employee Details PCA Details PRC Details Employee Training Empl ID 0100250 Jones, Robert S *NID Fores *NID Fores Receive Final Notification For DDC or RFO only: Check to receive notifications *Fax 555/555-5555 *Business Email Fores@ucf.edu 8. A list of PCard holders for the approver you searched for displays. To add a PCard 	
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8. A list of PCard holders for the approver you searched for displays. To add a PCard	
holder click the add button (+)	
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Cardholder Personalize Find View All 🔄 🔢 First 🕚 1 of 1 🕑 Last	
*EmpIID Name Status PCA History	
1 0105369 Q Jones, Tamara P Active V PCA History	
Note: Clicking the PCA History link will display the PCA history of an employee,	
including his/her EmplID, name, status, and the date and time of any update.	
9. Enter the EmplID of the PCArd holder you want to add or click the lookup icon to	
locate an employee's ID.	
Cardholder Personalize F	
*EmpIID Name	
1 U105369 Q Jones, Iamara P	
The value you enter in the Emplin field represents the employee holding the PCer	
whose transactions the approver will review and, if appropriate, approve.	



Step	Action
10.	To change the employee's status, click the Status drop-down arrow next to the employee's name.
	View All 🗇 🔢 First
11.	Click Save.



Inactivating/Removing a PCard Holder from the PCA Details Tab

1.	Complete steps 1-7 from the previous instruction list to navigate to the PCA Details tab for a selected PCard approver.
2.	Select the Cardholder section's overall Status drop-down list. Change the Cardholder section to view active cardholders, inactive cardholders, or both. Note: Either All or Inactive must be selected to view a requester who has been inactived. Employee Training Status: Active
	ze Find] First Active ist *Status History Active Active History + Active History +
u	To inactivate a PCard holder from the list, click the Status drop-down arrow next to the employee's name.
4.	Select Inactive.



5.	Click Save.	
	Employee Details PCA Details PCC Details Employee Training	