Example Scenario for Training Purposes Only

Note: The following training exercise is intended to provide "real-life" scenarios for use during instructor led training. Refer to the accompanying data sheet as necessary while performing the practice training exercises. Please note that the scenario and data provided are for example purposes only.

OVERVIEW

Purpose

The purpose of this document is to provide the necessary information to complete the classroom training exercises. In addition to the information provided below, you may also reference your training guide for additional information.

List of Activities

The following training exercise is part of the PRO301: Managing Procurement Cards course.

- Activity 1: Create a Cardholder Profile

ACTIVITY 1: CREATE A CARDHOLDER PROFILE TRAINING EXERCISE

Scenario: A new employee just recently applied for a P-Card. After the security access was granted, the P-Card Administrator needs to create a cardholder profile. As the P-Card Administrator, you need to create his cardholder profile, assign proxy users, and establish the cardholder defaults. Use the data in the following table to complete the activity.

Field	Value
Navigation: **Main Menu** > **Purchasing** > **Procurement Cards** > **Definitions** > **Cardholder Profile**	
Employee ID	*Refer to Data Element 1*
Click **Search**	
Click on the **Personal Data** tab*	
Click on the **Card Data** tab	
Business Unit	37000
Card Issuer	USBNK
Card Number	*Refer to Data Element 2*
Expiration Date	04/30/2016
Card Type	Visa

Field	Value
Date Issued	02/01/2014
Click on the **Additional Information** tab	
Click **Proxies**	
User ID 1	Instructor17
Role 1	AGENCY P-CARD ADMINISTRATOR
User ID 2	Instructor02
Role 2	AGENCY P-CARD APPROVER
User ID 3	Instructor29
Role 3	AGENCY P-CARD RECONCILER
User ID 4	Instructor46
Role 4	AGENCY P-CARD REVIEWER
Click **OK**	
Click on the **Additional Information** tab	
Click **Default Distrib**	
Ship To	00001704
Distribution Choices	Use Single-Line Distribution
GL Unit	37000
Bud Ref	FY2015
Fund	10000
Appropriation	44100
Dept	3701081101
Account	7500000
Click **OK**	
Click **Save**	
You have now completed this training exercise!	

* On the **Personal Data** tab, review the information to ensure the correct employee is selected.