

Logging On/Off PCMS

To access PCMS,

1. Double-click on the **PCMSv4 Prod** icon located on your desktop.
2. The WARNING popup window appears. Read the message and click **[OK]**.
3. The Logon popup window appears.
Enter your **USERNAME** and **PASSWORD** and click **[Logon]**. Use your **mouse** or press **[Tab]** to move between fields.

After you successfully log on, the PCMS Main Menu for the Fleet Card appears.

To exit PCMS, click **[Exit PCMS]** from the Main Menu.

Command Bar

In PCMS, the following command buttons, located at the top of each screen, are used to initiate or confirm actions.

Command	Description
Save	Enters into the database all additions/changes made to a record.
Print	Prints the current screen.
Clear Form	Clears and deletes all data in the form.
Find	Activates a search. Click once to initiate the query mode. Click a second time to activate the search.
Insert	Inserts a new record after the current record; retaining the LFPC information.
Remove	Deletes the retrieved record from the database that <u>has not</u> been sent to the bank. Also, it will remove a line of accounting in profile accounting.
Clear Rec	Removes the current record, reversing any unsaved changes. A cleared record is not deleted from the database.
Edit	Displays the Editor popup window, allowing you to edit a field.
List	Displays a list popup window for selecting valid field entries.
Help	Currently inactive.

Replacement Cards

When a card is damaged, request a replacement card. Query the record and check the status of the SENT TO BANK and RETURNED FM BANK dates. If the Returned Fm BANK date is not complete from a previous action, either wait for the acknowledgement to return or, if the acknowledgement takes a while to return, call the Procurement Modernization Team (PMT) at 202/690-3756 to explain the situation. If both dates are complete, click on the box to the left of **REPLACE CARD** and click **[Save]**. The record is sent to the bank containing an action code of "R."

Lost/Stolen Cards

The fleet card user should notify their LFPC and the vendor (Voyager) immediately of any lost or stolen fleet credit cards. The number for the vendor is on the back of the fleet card, 1-888-785-1747. The LFPC should annotate lost/stolen information in the COMMENTS field of the Card Info section of the Fleet Card Setup screen related to the card. Refer to the *Fleet PCMS User's Guide* for complete instructions.

Delete a Card

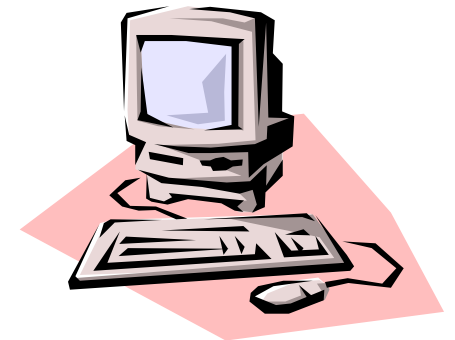
When a piece of equipment has been taken out of service, it needs to be deleted from PCMS. Query the equipment record and check the status of the SENT TO BANK and RETURNED FM BANK dates. If the RETURNED FM BANK date is not complete from a previous action, wait for the acknowledgement to return. If both dates are complete, click on the box to the left of **DELETE CARD** and click **[Save]**. The record sent to the bank will contain an action code of "D."

Fleet Card Maintenance

Refer to the *Fleet PCMS User's Guide* for complete details in managing fleet credit cards in PCMS. PCMS and SAMS user guides can be viewed and downloaded at <http://www.usda.gov/procure/pcard/pcguide.htm>.



FLEET PCMS QUICK GUIDE



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Fleet Card Setup

Select Fleet Card Setup under Fleet Card on the Main Menu.

Requesting a New Fleet Card

1. Place your cursor in the LFPC USER ID field and click **[List]**. Select an LFPC from the list of values to assign to this record.
2. Enter the new **Tag/Equipment Number** and all other appropriate data (e.g., hierarchy, card info, equipment info, limit info) for this piece of equipment.
3. Enter the appropriate profile accounting for the fleet card. The accounting code will be validated as you tab from the ACCOUNTING CODE field to the DISTRIBUTION PERCENT field. Refer to *Profile Accounting* in the *Fleet PCMS User's Guide* for additional details on entering data.
4. Click **[Save]**.

Copying a New Fleet Card Record

When you have several new fleet cards to set up in PCMS that have similar information, proceed with the following steps:

1. Enter the first record and click **[Save]**.
2. Click **[Copy Rec]**.
3. Change the **TAG/EQUIPMENT NUMBER** to the next record you need to add (tag/equipment numbers cannot be duplicated). Also, change any other information that is necessary (e.g., EQUIPMENT CITY, EQUIPMENT STATE, TYPE OF CARD, TYPE OF EQUIPMENT, etc.).
4. Click **[Save]**.
5. Repeat steps 2 through 4 as necessary.

Modifying a Fleet Card Record

Most of the fields in the Fleet Card Setup screen can be modified. New cards will only be issued when information in the magnetic strip or information embossed upon the card changes. Once a record is added to PCMS and sent to the bank, updates to Profile Accounting cannot be done through Fleet Card Setup but must be completed through the Profile Accounting sub-option under Fleet Card.

To modify a fleet card account:

1. Query a fleet card record (refer to *Querying Fleet Card Records* below);
2. If SENT TO BANK and RETURNED FM BANK dates are complete for the selected record, make changes to the appropriate information (refer to the guidelines below); and
3. Click **[Save]**.

Querying Fleet Card Records

- ◆ To query all fleet card records attached to the LFPC user id used to log into PCMS, click **[Find]** twice. After the screen populates, use the scroll bar to the left to view each record.
- ◆ To query for fleet card records under a specific LFPC:
 1. Click **[Find]**.
 2. Place the cursor in the **LFPC USER ID** field and click the **[List]** button. Select the appropriate id to populate the LAPC Id and name fields and click **[OK]**.
 3. Click **[Find]** again. The screen will populate with the first of the equipment records listed under that LFPC.
 4. The scroll bar to the left of the equipment information will be active, allowing you to view each record.
- ◆ To query for a specific fleet card record, enter the **TAG/EQUIPMENT NUMBER** for the record. Use the steps below:
 1. Click **[Find]**.
 2. Enter the **TAG/EQUIPMENT NUMBER** and click **[Find]**.

Guidelines:

- ◆ When the last action requested equals "A" and the SENT TO BANK field is not complete, this indicates that the fleet card record has not yet been sent to the bank. All the fields in the Fleet Card Setup screen can be modified, including profile accounting.
- ◆ When the LAST ACTION CODE equals A, M, T, or R and the SENT TO BANK field is complete but the RETURNED FM BANK field is not complete, this indicates that the fleet card record was sent to the bank but has not yet returned. No updates can be made to this record until the RETURNED FM BANK date is complete.

- ◆ When the LAST ACTION REQUESTED equals A, M, T, or R and the SENT TO BANK and RETURNED FM BANK fields are complete, this indicates that the fleet card record was processed by the bank. Most fields in the Fleet Card Setup screen, except for profile accounting, can be modified. (Refer to *Profile Accounting* in the *Fleet PCMS User's Guide*.)

Record Changes That Cause a New Card to be Issued

New cards will only be issued when information in the magnetic strip or information embossed upon the card changes. Updating any of the fields below will change the LAST ACTION REQUESTED field to "M(odify)" and send the record to the bank.

TYPE OF PLASTIC	DRIVER MIDDLE INITIAL
TYPE OF EQUIPMENT	DRIVER LAST NAME
EMBOSS IN SPANISH	DRIVER ADDRESS LN1
FUEL & MAINT	DRIVER ADDRESS LN2
ODOMETER	DRIVER CITY
DRIVER NUMBER	DRIVER STATE
DRIVER FIRST NAME	DRIVER ZIP

Record Changes that Update PCMS Only

The action code U(pdate PCMS Only) will indicate that the update is only for PCMS and that the modified record will not be sent to the bank. Both the SENT TO BANK and RETURNED FM BANK fields will be completed with the current date. This action code is attached to the following fields when modified:

EQUIPMENT CITY	GALLONS PER TRANSACTION
EQUIPMENT STATE	LIMIT
EQUIPMENT ZIP	MAINTENANCE COST PER
EQUIPMENT ZIP	TRANSACTION LIMIT
EXTENSION	COMMENTS
EQUIPMENT CLASS CODE	Profile Accounting:
VEHICLE	AGENCY
MAKE/MODEL/YEAR	STATION
FUEL COST PER	ACCOUNTING CODE
TRANSACTION LIMIT	DISTRIBUTION PERCENT
PRICE PER GALLON LIMIT	

Keep in mind that if changes to a record are going to be both Update and Modify, enter the Update first.