

Finding Credit Card Transactions in WORKDAY (PCARD)

You will not receive notices from Workday that you have transactions to review. You must look for them to verify your purchases. If you do not verify your transactions, your budgets will be in error.

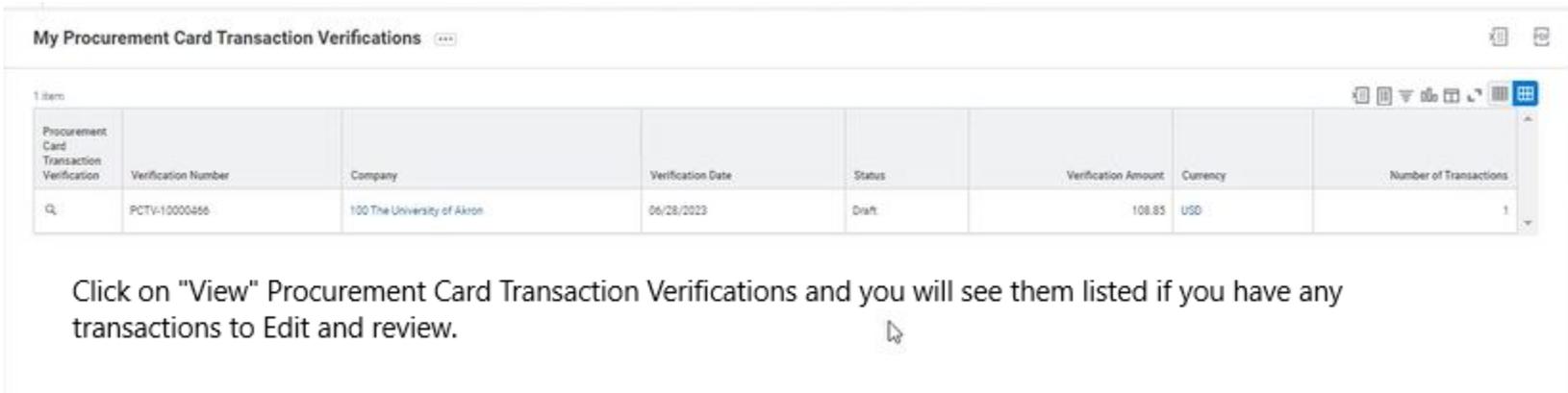
The screenshot shows the Workday Purchases interface. At the top, there is a navigation bar with a 'MENU' icon, the Workday logo, a search bar, and notification icons. Below the navigation bar, the page title is 'Purchases'. The main content area is divided into several sections:

- Actions:** A list of buttons for creating and managing transactions, including 'Verify Procurement Card Transactions'. A green arrow points to this button from the text: 'New Transactions will be seen here first and are ready to be verified. If you leave the screen for any reason, they will be in "Draft" stage and can no longer be reconciled in this action tab.'
- External Links:** A list of buttons for external resources, including 'Vendor Registration Packet', 'OPERS Form', 'Create Supplier Invoice Request', 'Procurement Card Program', 'How do I purchase?', and '2022 Tax Exempt Form'.
- View:** A list of buttons for viewing different types of transactions, including 'Procurement Card Transactions' and 'Procurement Card Transaction Verifications'. A green arrow points to this button from the text: 'Draft Transactions can be seen and edited here. To Edit, click on the PCTV 3 dots, under Action on the left side, click on Credit Card Transaction and "Edit"'
- Cart:** A section showing '0 Items' and a 'Cart' button.

BE SURE TO CHECK BOTH VERIFY PROCUREMENT CARD TRANSACTIONS AND VIEW PROCUREMENT CARD TRANSACTION VERIFICATIONS TO SEE IF YOU HAVE ANY TRANSACTIONS THAT NEED TO BE VERIFIED.

You can always see the state of your transactions by going to VIEW Procurement Card Transactions, but you will NOT be able to edit them from this screen.

TO EDIT A PROCUREMENT CARD TRANSACTION ONCE IT GOES TO DRAFT STATUS:

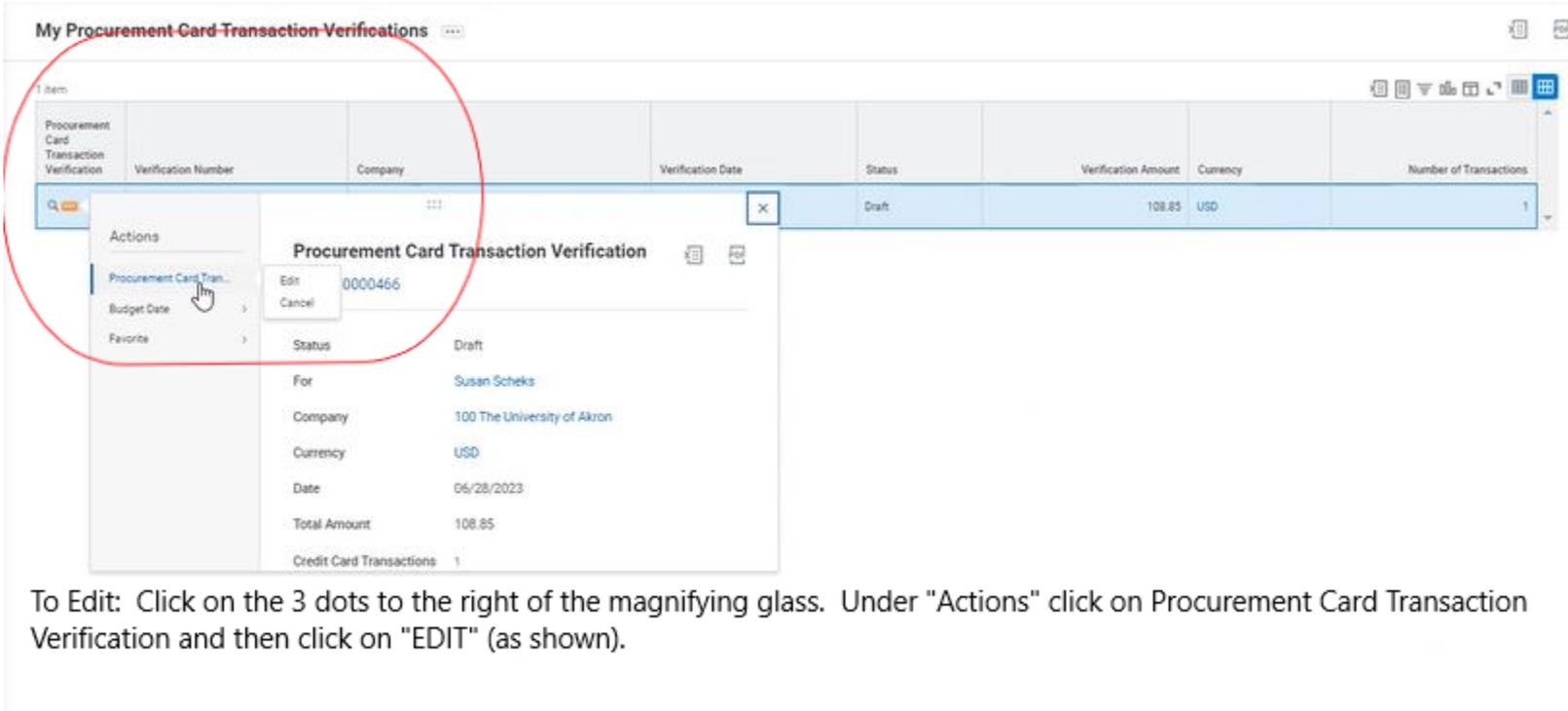


My Procurement Card Transaction Verifications

1 item

Procurement Card Transaction Verification	Verification Number	Company	Verification Date	Status	Verification Amount	Currency	Number of Transactions
Q	PCTV-10000466	100 The University of Akron	06/28/2023	Draft	108.85	USD	1

Click on "View" Procurement Card Transaction Verifications and you will see them listed if you have any transactions to Edit and review.



My Procurement Card Transaction Verifications

1 item

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Actions

- Procurement Card Tran...
- Budget Date
- Favorites

Procurement Card Transaction Verification

Edit 0000466

Cancel

Status Draft

For Susan Scheks

Company 100 The University of Akron

Currency USD

Date 06/28/2023

Total Amount 108.85

Credit Card Transactions 1

To Edit: Click on the 3 dots to the right of the magnifying glass. Under "Actions" click on Procurement Card Transaction Verification and then click on "EDIT" (as shown).

Once you Enter "Edit" Mode, you can verify transactions per instructions for "Verifying Procurement Card Transactions.

These instructions are for PCard Transaction verifications. For reconciliation of THE-Card transactions, see next page.

From your Menu: Click on **Expenses** and then Create Expense Report to verify or Edit Expense Transactions to change your report information. **(THE-CARD)**

Expenses

First Action so that you can find your credit card transactions for THE-Card..
Create an Expense Report.



If you need to change or edit your THE-Card transaction verifications.



Actions

Create Expense Report

Create Spend Authorization

Edit Expense Transactions

External Links

Travel Forms & Policies

View

Expense Reports

Spend Authorizations

Expense Transactions

Payment Elections

Expense Outstanding Balance (0 USD)

Recent Expense Reports

Canceled - 06/08/2023