Finding Credit Card Transactions in WORKDAY <mark>(PCARD)</mark>

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.
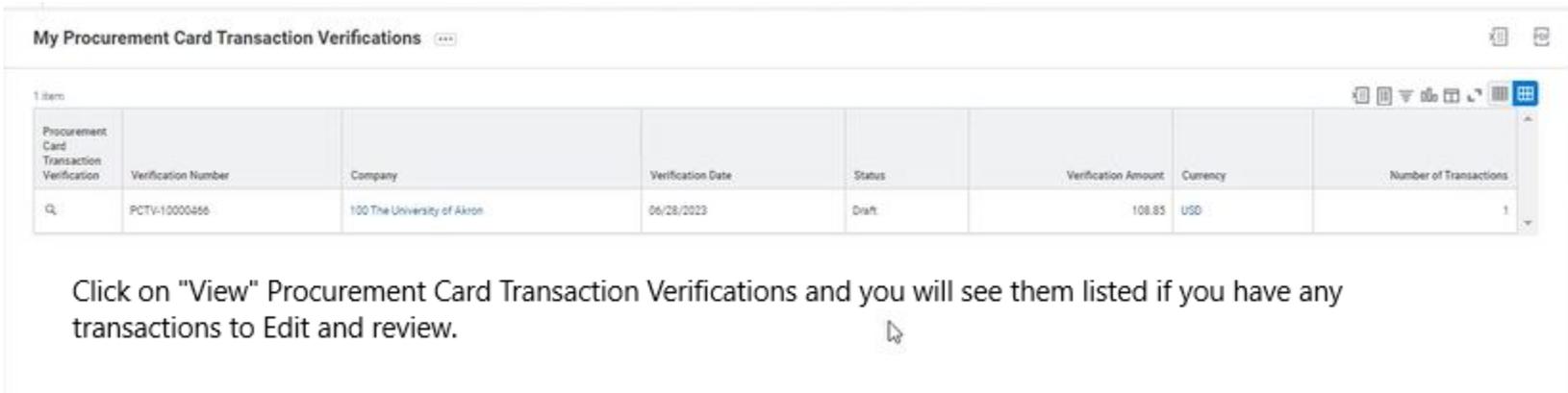

BE SURE TO CHECK BOTH VERIFY PROCUREMENT CARD TRANSACTIONS AND VIEW PROCUREMENT CARD TRANSACTION VERIFICATIONS TO SEE IF YOU HAVE ANY TRANSACTIONS THAT NEED TO BE VERIFIED.

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.

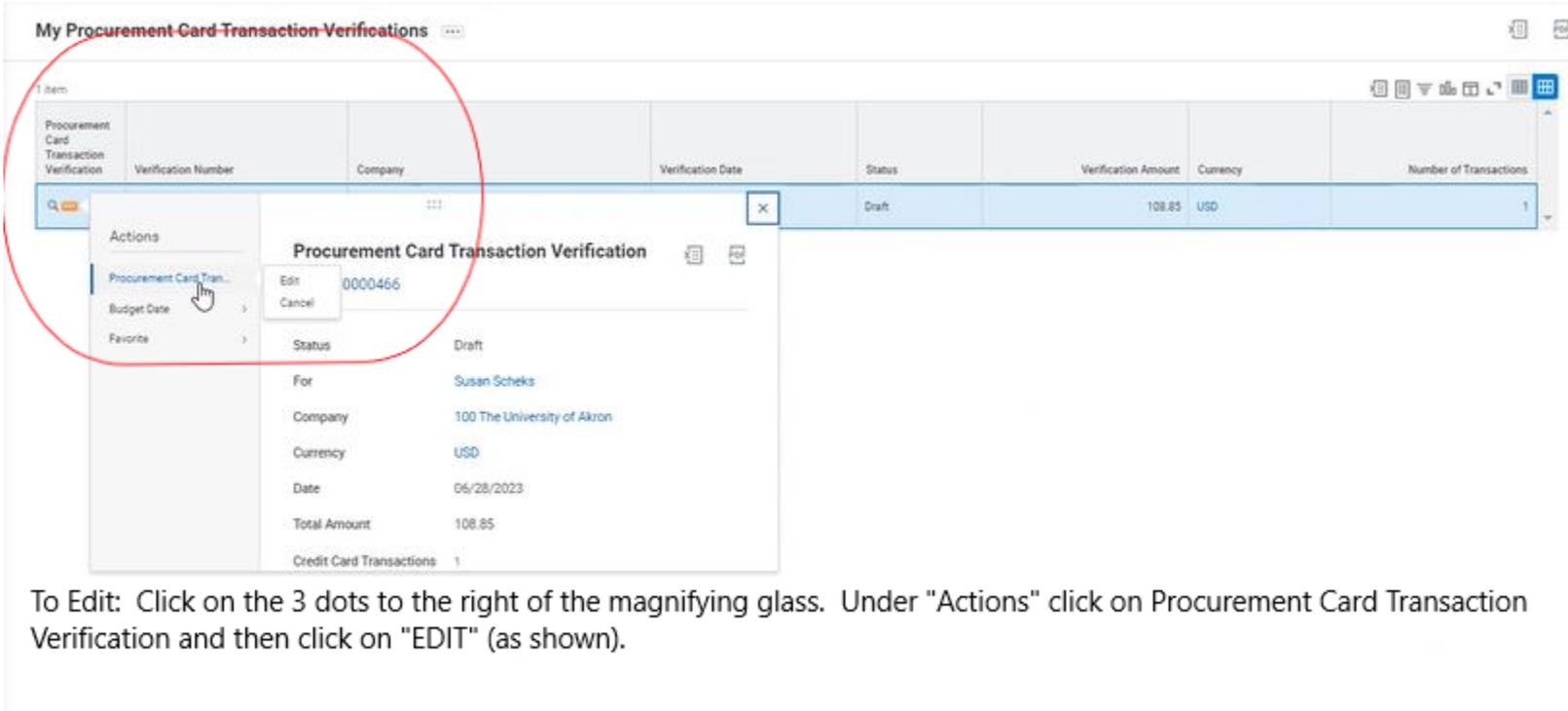TO EDIT A PROCUREMENT CARD TRANSACTION ONCE IT GOES TO DRAFT STATUS:

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

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