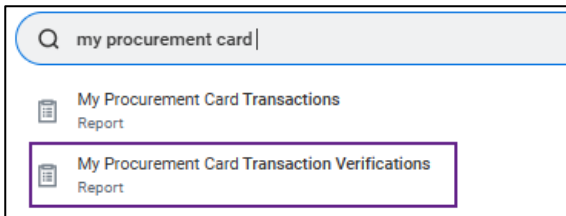


### Overview

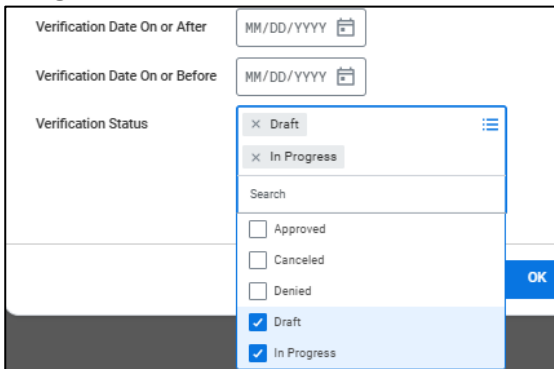
This Job Aid provides instructions to find Procurement card Transaction that are in either the Draft or In Progress Status. The Save for Later transactions are also found under the Draft status. Moreover, if a report is In Progress, one of the approvers on the approval process can also send back the report for editing. Reports that are sent back go to requesters My Tasks.

### How to Find Draft and In Progress P-Card Transactions

1. From the Workday search bar, enter and select the **My Procurement Card Transaction Verifications** Report.



2. The report can be narrowed down based on the date and status. In the Verification Status field, select the **Draft** and **In Progress** status.




3. Click **OK**.
4. The table containing the appropriate results will display.

### Edit a Transaction

Only the transactions in the **Draft** status can be edited.

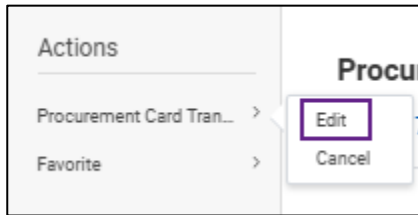
1. Locate the transaction by following steps under the **“How to Find Draft and In Progress P-Card Transactions”** section.
2. Hover on the appropriate **PC number** under the Procurement card transaction verification column.
3. Click on the **related actions button** next to the PC number.

| Procurement Card Transaction Verification   | Verification Number | Company            | Verification Date | Status |
|---|---------------------|--------------------|-------------------|--------|
| PC:  |                     | Montgomery College |                   | Draft  |

4. Under Actions, hover on Procurement Card Transaction verification and click **Edit**.

## How to Find and Edit P-Card Transactions

### Workday Job Aid for Employees




5. The Transaction Details display. Edit the transaction as needed and click **Submit**.

### Change a Transaction

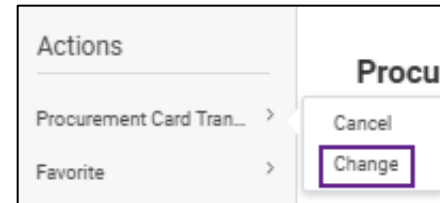
The transactions in the **In Progress** or **Approved** Status can be *changed*.

If you change a transaction, it goes back to Draft status, the business process starts over, and all approvals are required again.

1. Locate the transaction by following steps under the “**How to Find Draft and In Progress P-Card Transactions**” section.
2. Hover on the appropriate **PC number** under the Procurement card transaction verification column.
3. Click on the **related actions button** next to the PC number.

| Procurement Card Transaction Verification   | Verification Number | Company            | Verification Date | Status      |
|---|---------------------|--------------------|-------------------|-------------|
| PC:  |                     | Montgomery College |                   | In Progress |

4. Under Actions, hover on Procurement Card Transaction verification and click **Change**.




5. A pop-up message appears, click **OK**.
6. The Transaction Details display. Make the required changes and click **Submit** for the transaction to start the business process.

### Cancel a Transaction

The transactions in the **Draft** or **In Progress** Status can be *cancelled*. Approved transactions cannot be cancelled.

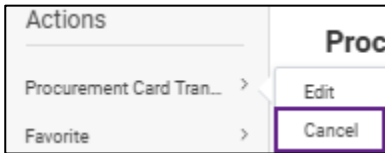
1. Locate the transaction by following steps under the “**How to Find Draft and In Progress P-Card Transactions**” section.
2. Hover on the appropriate **PC number** under the Procurement card transaction verification column.
3. Click on the **related actions button** next to the PC number.

| Procurement Card Transaction Verification   |
|---|
| PC:  |

4. Under Actions, hover on Procurement Card Transaction verification and click **Cancel**.

## How to Find and Edit P-Card Transactions

### *Workday Job Aid for Employees*



5. A confirmation pop-up appears, to proceed and cancel the transaction, click **OK**.

