MONTGOMERY COLLEGE How to Find and Edit P-Card Transactions Workday Job Aid for Employees

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.

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	0111	My Procurement Card Transactions Report			
	1	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.

Verification Date On or After	MM/DD/YYYY	
Verification Date On or Before	MM/DD/YYYY	
Verification Status	× Draft	
	× In Progress	
	Search	
	Approved	
	Canceled	
	Denied	OK
	✓ Draft	
	In Progress	

- 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.**

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Actions			Pre	ocui
Procurement Card Tran	2	ſ	Edit	-
Favorite	>		Cancel	

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 <u>business</u> <u>process starts over</u>, 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
PC4 8000		Montgomery College		In Progress

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

Actions		Procur
Procurement Card Tran	2	Cancel
Favorite	>	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-	0			

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

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

Confirm Procurement Card	Transaction Verification Cancel
Are you sure you want to cancel this P-Card Trai	nsaction Verification? This action cannot be undone.
OK Cancel	