PULLING UP NEW TRANSACTIONS BY MONTH IN THE P-CARD MODULE

Option 1:

1. To look at the new transactions in PeopleSoft for the month of July, click on “Trans Date” within the Transaction tab. The newest transactions will populate to the top.
2. You will notice that the Chartfield Status for the new transactions is “Recycled”. Work your way down completing each transaction line.

Option 2:

1. At the bottom of the screen click on “Search”
2. The below message will appear, click “Yes”, only if you have not changed any data that requires saving. By clicking “Yes” you will now be able to proceed to the next step.

3. The below box will populate, go to Statement Status and select “Staged / click OK”, now only the new staged transactions will appear on your screen. All the other transactions that you reconciled previously (Example: June), will not appear.

- Another way to pull up the new transactions is to (follow steps 1 to 2) then, go to the Chartfield Status and select “Recycled / click ok” all of the new transactions will appear.
Just a reminder if you receive an error when printing now that there are multiple months in the system, follow the instructions below:

WORK AROUND: STEPS TO FOLLOW ONLY IF RECEIVING AN ERROR MESSAGE WHEN TRYING TO PRINT

(Please note: the P-card Module only prints “Verified” transactions, so if you have approved transactions in your list you will receive an error message. To get around this error message you need to complete a search for Verified transactions. See the below for a quick work around:

1. Step 1: Select Search
2. Step 2. This pop-up box will appear within the Statement Status please select “Verified” this will bring up all recent work you have completed by following all of the steps above. You are now able to print your register.