Run Outstanding P-Card Transactions Report

This guide will cover:

- How to navigate to and run the Outstanding P-Card Transactions Report on Transactional Reporting Table of Contents in WyoCloud.
- This report details p-card transactions which have not yet been reconciled. Once a p-card charge has been added to an expense report, it will not appear in this report.

Step One

To log into WyoCloud:

- Navigate to the WyoWeb website and select Financial Management & HCM from the WyoCloud area.

Step Two

To Navigate to Reports and Navigation in WyoCloud:

- From the WyoCloud Home page, click Navigator (three horizontal lines) in the upper left corner then Reports and Analytics under Tools.
The **Reports and Analytics** page is displayed.
Step Three
Navigate to the Transactional Reporting Table of Contents, where the Outstanding P-Card Transactions Report is located.

- Select the small **double arrow** above the search.

- From the drop down, select **Shared Folders**.
- All Shared Folders you currently have security access for will display. To locate the Transactional Table of Contents, begin by clicking on the **Custom** folder (you may need to scroll to locate it).

Click **Dashboards**.
- Click **Table of Contents**.

**Reports and Analytics**

- **Filter**
  - All types
  - Favorites
  - Clear Filters

- **Create**

- **Table of Contents**

- To open the Table of Contents, click on the **title**.

**Note:** You can set the Table of Contents as a favorite for easier navigation in the future. For directions see this [Quick Reference Guide](#).
Step Four
Run the Outstanding P-Card Transactions Report:

- Select **Outstanding PCard Transactions** under Expenses and P-Card.

You can filter the report any of the following prompts. Note: You MUST at minimum include a date range in the **Posted Date From** and **Posted Date To** fields.

- **Posted Date From** and **Posted Date To**: Enter the specific range of dates that you would like to review outstanding p-card transactions from. Note: This is the date the transaction was loaded into WyoCloud, not necessarily the date the transaction occurred with the merchant.

- **Cardmember Name**: Enter a specific cardholder name if you would like to search by name. This field can be left blank. However, if nothing is entered in either this or the organization field, the report will populate with all cardholders.

- **Organization**: Identify a specific organization to pull all outstanding p-card transactions assigned to individuals within a given organization. Note: this field searches by organization name, not organization account code (i.e., Budget Office not org number 21001).

- Click **Apply**.
- The **Outstanding P-Card Transactions Report** is displayed.

<table>
<thead>
<tr>
<th>St City</th>
<th>Merchant Name</th>
<th>Amount</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>OMC</td>
<td></td>
<td></td>
<td>(50.01)</td>
<td>(50.01)</td>
<td>$204.60</td>
<td></td>
<td></td>
<td>$204.60</td>
<td></td>
</tr>
<tr>
<td>32714</td>
<td></td>
<td>$292.12</td>
<td>4/18/19</td>
<td>4/18/19</td>
<td>4/18/19</td>
<td>4/18/19</td>
<td>4/18/19</td>
<td>4/18/19</td>
<td>4/18/19</td>
</tr>
<tr>
<td>2600</td>
<td></td>
<td>$153.00</td>
<td>5/7/18</td>
<td>5/7/18</td>
<td>5/7/18</td>
<td>5/7/18</td>
<td>5/7/18</td>
<td>5/7/18</td>
<td>5/7/18</td>
</tr>
</tbody>
</table>

- On this report you can see all details of the transaction including: merchant name and location, transaction date and amount.
- **Note:** You may need to use the scroll feature on the far right side to view all charges.
- You may also click on the small arrow to remove the prompt filters to see more columns without needing to scroll. Depending on your screen size/resolution this may allow you to view all columns.

You have now completed the steps to run the Outstanding P-Card Transactions Report.