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 or have been added to an expense report which has not yet been submitted. Once a p-card charge has been submitted on an expense report, it will not appear in this report.

Step One

Navigate to Reports and Analytics in WyoCloud:
- From the WyoCloud Home page, click Navigator then Reports and Analytics.
The Reports and Analytics page is displayed.

**Step Two**

Navigate to the Transactional Reporting Table of Contents:
- Navigate to the Catalog. Click Shared Folders > Custom > Dashboards > Table of Contents > View
Step Three
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 (ie: Budget Office not org number 21001).

- Click **Apply**.

The **Outstanding P-Card Transactions Report** is displayed.
On this report you can see all details of the transaction including: merchant name and location, transaction date and amount. By scrolling to the right, if the charge has been added to an expense report, but not yet submitted you can see the expense report number, status and expense description.

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.