

ProCard Historical Transactions Job Aid

Procard Historical Data provides the ability to run Procard reports for previous month(s) transactions for review purposes only.

Here are the Step-by-Step instructions:

- 1) Login to Procard Transaction Management System and select the “Procard Historical Transactions from the drop-down menu.

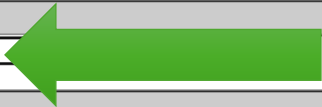
PROCUREMENT CARD SELECTION

Did you know... Receipt Uploads, Reallocations and Transaction Approvals can all be completed as soon as a transaction posts in Academica. The new system does not require you to wait until a month has ended to accomplish your Procard review. Approving transactions during the month will also give your Coordinators & Business Affairs officers sufficient time to review and approve your activity.

**** Do not wait until the deadline to submit your activity for approval. ****

Please select an option

ProCard Historical Transactions



- 2) When arriving to this screen, please clear cookies before proceeding (see MS Edge or Chrome browser settings). You can select your Display Options. You should see your list of procards linked to your name, however you also have the option to enter your Access ID under “Enter one or more User IDs”. You can select index account although it is not required so you can leave unchecked.

Procard User ID:

	Select a display option: <input checked="" type="radio"/> Display Ready Report <input type="radio"/> Excel Extract Report	Enter one or more userid's: <input type="text" value="ac0578"/>
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Procard Card Number(s): The 'Default' is 'All' or Select specific Procard's

Get Procards
 0048 - Kenneth E. Doherty
 0562 - Kenneth E. Doherty
 7003 - Kenneth E. Doherty
 7077 - Kenneth E. Doherty
 9991 - Patricia Ann Milewski



[Select all](#) [Deselect all](#)

Index Charged:

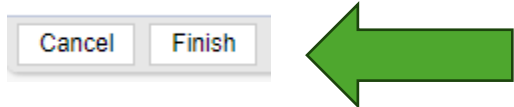
Get Indexes Charged
 020283
 028200
 044914
 060256
 112051
 112291
 120001
 120014
 120021

[Select all](#) [Deselect all](#)

3. Under the Beginning and Ending Post Dates you may enter your date parameters. **NOTE: The dates must correspond to previous months of activity, not the current month.** You can enter Transaction Dollar amounts although it is not required. Transaction Status section can be left unchecked.

Beginning and Ending Post Dates:		Transaction Dollar Amount Range:	
From: <input type="radio"/> Oct 28, 2024  <input checked="" type="radio"/> Earliest date		From: <input type="text"/> <input checked="" type="radio"/> Lowest value	
To: <input type="radio"/> Oct 28, 2024  <input checked="" type="radio"/> Latest date		To: <input type="text"/> <input checked="" type="radio"/> Highest value	
Transaction Status:			
Transaction	Card Holder	Coordinator	Business Manager
<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete <input type="checkbox"/> Freeze Select all Deselect all	<input type="checkbox"/> Accepted <input type="checkbox"/> Pending <input type="checkbox"/> Disputed <input type="checkbox"/> Rejected <input type="checkbox"/> Violation Select all Deselect all	<input type="checkbox"/> Accepted <input type="checkbox"/> Pending <input type="checkbox"/> Disputed <input type="checkbox"/> Rejected <input type="checkbox"/> Violation Select all Deselect all	<input type="checkbox"/> Accepted <input type="checkbox"/> Pending <input type="checkbox"/> Disputed <input type="checkbox"/> Rejected <input type="checkbox"/> Violation Select all Deselect all

4. Click on “Finish” to run your report. If you click on “Cancel” it will provide the opportunity to start over. If you have selected the “Display Ready Report” in Step 1 your Excel report should display automatically. If you have selected the Excel Extract Report, it would provide options of report formats (CSV, Excel, etc.).



Any questions or concerns, please contact the Procard Office – email: procard@wayne.edu or phone 313-577-3708