

Director of Purchasing and Inventories

## West Texas A&M University

# Procurement Card Program

Level/Group Manager Guide

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## **Home Screen**

This is the home screen for Level /Account Group Managers. Level /Account Group Managers can view how many users and cardholder users are listed in their area. Level/Account Group Managers are also able to see how many transactions have been reviewed and approved over the previous 30-day period.

Figancial Reports Accounts Hear				
Financial Reports Accounts User				
ACTIVITY		REPORTS & DATA FILES		NEWS
A ALERTS & NOTIFICATIONS > Previous 30 days	0	SCHEDULED REPORTS >		AFTER SEPT 17, IT WILL BE EASIER TO RUN, CREA >
MOST RECENT POSTING DATE     10/04/2017		COMPLETED REPORTS >		After September 17th, the process to create and run reports will cha More
O TOTAL USERS Previous 30 days	11	DATA FILES >		LINKS
TOTAL LOCKED USERS >     Previous 30 days	0		More	(ITIMANAGER )
RECENTLY ADDED ACCOUNTS      Previous 30 days	0			CITIBANK CUSTOM REPORTING >
RECENTLY ADDED CARDHOLDER USERS >     Previous 30 days	0			RESOURCE CENTER
	_		Tabal Ibamas 24	GCMS REPORTING REFERENCE GUIDE >
TRANSACTIONS REVIEWED/NOT REVIEWED     Previous 30 days			Total Items: 31 3/28	HOW TO SET YOUR BROWSER TO TLS 1.1 AND HIGHER >
			0/31	ADMINISTRATOR_INSTRUCTIONS_RELEASE_13.3 >
Previous 30 days			-,-*	CARDHOLDER_SELF- REGISTRATION_INSTRUCTIONS >
				MANAGER USER'S GUIDE > Complete Manual
			More	
SNAPSHOTS				
Spend By Category	•	Total Spend	0	

## **Account Summary**

The account summary provides the same information as it does for cardholders, but the level manager will be able to view the account summary for all of the cardholders in the reporting area.



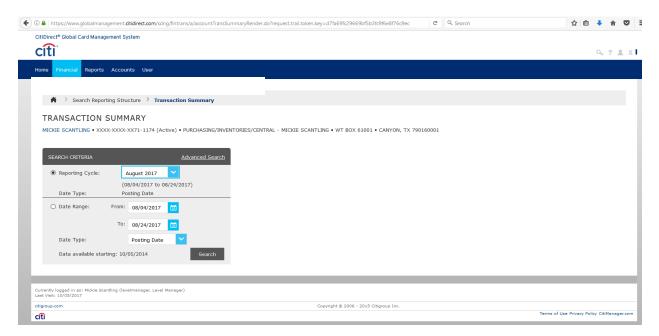
When you select the account summary option, you will be sent to a screen that looks like the one shown below. There are two ways to do this. **Option 1:** If you want to choose from a list of cardholders in your area, click on the drop-down menu and select the All(Account) option.

CitiDirect <sup>®</sup> Global Card M	lanagement System			
citi				9, 7 ± X
Home Financial Rep	orts Accounts User			
🖌 💚 Search F	Reporting Structure			
SEARCH REP	ORTING STRUCTURE			
SEARCH CRITERI			QUICK LINK	
Search By:	:	•	Select PURCHASING/INVENTORIES/CENTRAL A (Your assigned reporting level)	
	Org Point	Search	Recently Viewed: None	
_	- All (Org Point)		Select a Quick Link	
	- Org Point (Advanced)		Select a Quick Link	
	- Org Point Country			
	Org Point Name 1			
Currently logged in as: Micki	ie – Org Point Name 2	3		
Last Visit: 10/05/2017	- Org Point Number			
citigroup.com	Org Point Reports To Name		Copyright © 2006 - 2015 Citigroup Inc.	
cíti			ierms or us	e Privacy Policy CitiManager.com
	Account			
	- Al (Account)			
	Account (Advanced)			
	Account City			
	Account Country Account Name (contains)			
	- Account Number (ends with)			
	- Account Number (exact)			
	- Account Reports To Name			
		•		
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If you do this option, a list of the cardholders will appear at the bottom of your screen. Select the cardholder whose transaction summary you would like to view.

Direct <sup>®</sup> Global Card Managemer	nt System						
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ne <mark>Financial</mark> Reports Ac	counts User						
🔺 💚 Search Reporting	j Structure						
SEARCH REPORTIN	NG STRUCTURE						
SEARCH CRITERIA			Q	UICK LIN	<		
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SEARCH RESULTS						Se	elect a Quick Link
SEARCH RESULTS			÷		-	Se Page 1 of 1	
SEARCH RESULTS	Cardholder Name 2	Account Number	City	State	Country		
Cardholder Name 1	Cardholder Name 2	Account Number	City CANYON	State TX	Country UNITED STATES	Page 1 of 1	Page Co
Cardholder Name 1	Cardholder Name 2	Account Number	CANYON	TX TX	UNITED STATES UNITED STATES	Page 1 of 1 Reports To PURCHASING/INVENTORIES/CENTRAL PURCHASING/INVENTORIES/CENTRAL	Page Go Status Active Inactive
8 8 8	Cardholder Name 2	Account Number	CANYON CANYON CANYON	TX TX TX	UNITED STATES UNITED STATES UNITED STATES	Page 1 of 1 Reports To PURCHASING/INVENTORIES/CENTRAL PURCHASING/INVENTORIES/CENTRAL	Page Go Status Active Inactive Inactive
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Next, select the current reporting cycle and click "search." The transaction summary will appear on the following page.



**Option 2:** If you would like to view a list of all of the accounts at the same time, you can select the Quick Link that shows the name of your department.

🗧 🛈 🖴 https://www.globalmanagement.citidirect.com/sdng/navigatereportingstructure/navigatereportingstructureRende	r.do?request.trail.token.key=6b152439604ae93	Q. Search	☆自	<b>↓</b> 1		≡
CitiDirect® Global Card Management System						
cíti				0, ?	<b>x</b> x	1
Home Financial Reports Accounts User						
A Search Reporting Structure						
SEARCH REPORTING STRUCTURE						
			_			
SEARCH CRITERIA	QUICK LINK					
Search By: 💙 *	Select PURCHASING/INVENTORIES/CENTRAL & (Your assigned reporting level)	6				
Search	Recently Viewed: None	×				
		Select a Quick Link				
Currently logged in as: Nickle Scantling (levelmanager, Level Manager) Last Visit: 10/05/2017						
citigroup.com	Copyright © 2006 - 2015 Citigroup Inc.					
cítì		Terms of Us	e Privacy Pol	cy CitiMan	ager.com	1

#### Next you will select the billing cycle, and click "search."

https://www.globalmanagement.dtidirect.com/sdng/fintrans/a/accountTransSummaryRender.do?request.trail.token.key=d7fa69fc29669bf5b3fc9f6e8f76c9ec	C <sup>e</sup> Q. Search	☆ 自 🖡 余
tiDirect® Global Card Management System		
		9.7
ome <mark>Financial</mark> Reports Accounts User		
Search Reporting Structure ) Transaction Summary		
TRANSACTION SUMMARY		
MICKIE SCANTLING • XXXX-XXXX-XX71-1174 (Active) • PURCHASING/INVENTORIES/CENTRAL - MICKIE SCANTLING • WT BOX 61001 • CANYON, TX 7901	60001	
SEARCH CRITERIA Advanced Search		
Reporting Cycle:		
(08/04/2017 to 08/24/2017)		
Date Type: Posting Date		
O Date Range: From: 08/04/2017 m		
0,0,0,0,0,0		
To: 08/24/2017		
Date Type: Posting Date		
Data available starting: 10/05/2014 Search		
urrently logged in as: Mickie Scantling (levelmanager, Level Manager)		
st Visit: 10/05/2017		
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Gopyngnt © 2006 - 2013 Citigroup Inc.		Terms of Use Privacy Policy CitiManag

The following page will show only the accounts that have had activity in the listed reporting period and the amount of those cardholders' transactions. Click on the account number to view the transactions of each individual.

	Advanced Search					
Reporting Cycle:	August 2017					
Date Type:	08/04/2017 to 08/24/2017 Posting Date					
O Date Range:	From: 08/04/2017					
	To: 08/24/2017					
Date Type:	Posting Date					
Data available star	rting: 10/05/2014 Search					
EARCH RESUL	TS			Search T	otalı 10.626.46	
EARCH RESUL	TS			Search T Page 1 of 1 Page		
SEARCH RESUL	TS Account.Humber	Transaction Amount	Adjustment Amount		Go tion Amount	
	_	142.00	0.00	Page 1 of 1 Page	co tion Amount 142.00	
	_			Page 1 of 1 Page	Go tion Amount	
	_	142.00 7,027.13 35.72 2,123.69	0.00 0.00 0.00 0.00	Page 1 of 1 Page	Go ction Amount 142.00 7,027.13 35.72 2,123.69	
	_	142.00 7,027.13 35.72	0.00 0.00 0.00	Page 1 of 1 Page Total Transac	Co 142.00 7,027.13 35.72 2,123.69 1,297.92	
	_	142.00 7,027.13 35.72 2,123.69	0.00 0.00 0.00 0.00	Page 1 of 1 Page	Co 142.00 7,027.13 35.72 2,123.69 1,297.92	
	_	142.00 7,027.13 35.72 2,123.69	0.00 0.00 0.00 0.00	Page 1 of 1 Page Total Transac	Co 142.00 7,027.13 35.72 2,123.69 1,297.92	

#### This is an example of an Account Summary:

		08/24	F/ 2017 131								
Date T	ype:	Postir	ng Date 🔽								
Data a	vailable starting	g: 10/05/201	4	Search							
SEARCH	RESULTS	;									
Expand All	Collapse All								Search Total: 2,123.69		
⊠ 🗎	9							Page 1 of 1	Page Go		
Detail	Reviewed	Approved	Posting Date	Transaction Date	Description	Transaction Amount	Tax Amount	Alternate Tax Amount Additio	nal Information		
4 🕫 🔪			08/08/2017	07/28/2017	GRAYMAC 806-6222248, TX -79118-6130	(135.00)					
-1 🖻 🕨			08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA - 50021	159.00					
4 🕾 🕨			08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA -50021	745.77					
-1 🖻 🕨			08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA - 50021	56.56					
4 🕾 🕨			08/07/2017	08/04/2017	REPUBLIC SERVICES TRAS 08665765548, AZ -85054	504.37	86.04				
-1 <sup>6</sup> >			08/10/2017	08/09/2017	WAGNER SUPPLY 08067472877, TX - 79404	422.92					
4 🕾 🕨			08/14/2017	08/11/2017	WAL-MART #0793 CANYON, TX -79015	9.44					
-1 <sup>6</sup> >			08/17/2017	08/16/2017	WAGNER SUPPLY LUBBOCK, TX -79404	132.91					
4 19 14			08/24/2017	08/22/2017	SHOPPAS MATERIAL HAN FORT WORTH, TX -76155	227.72					
∞ 🔒	9							Page 1 of 1	Page Go		
_	_	_	_	_			_			1	

## **Approving Transactions**

Department Heads will have the option to approve all cardholders' transactions online by checking the "approved" box in the account summary screen, or sign off on the report log. Once the boxes have been checked, click "save" to save your work. This will need to be done for each individual cardholder.

Date Ty	pe:		ng Date						
Data av	ailable starting	g: 10/10/2014	4	Search					
SEARCH	RESULTS								
Expand All   (	Collapse All								Search Total: 2,123.69
× 8 3	9							Page 1 of 1	Page Go
Detail	Reviewed	Approved	Posting Date	Transaction Date	Description	Transaction Amount	Tax Amount	Alternate Tax Amount Additi	onal Information
16)			08/08/2017	07/28/2017	GRAYMAC 806-6222248, TX -79118-6130	(135.00)			
<u>че</u> >			08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA -50021	159.00			
16 >			08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA -50021	745.77			
<u>₩</u> @ >			08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA - 50021	56.56			
16 >			08/07/2017	08/04/2017	REPUBLIC SERVICES TRAS 08665765548, AZ -85054	504.37	86.04		
<u>₩8</u> >			08/10/2017	08/09/2017	WAGNER SUPPLY 08067472877, TX -79404	422.92			
16 >			08/14/2017	08/11/2017	WAL-MART #0793 CANYON, TX -79015	9.44			
16)			08/17/2017	08/16/2017	WAGNER SUPPLY LUBBOCK, TX -79404	132.91			
16)			08/24/2017	08/22/2017	SHOPPAS MATERIAL HAN FORT WORTH, TX -76155	227.72			
a 🔒 3	9							Page 1 of 1	Page Go

Once you have saved your work, the transactions will be locked to prevent further editing.

- Incepagyw	ww.globalmanage			s/a/accountTransSumma	ryRender.do?request.trail.token.key=19d	la6ef1404c4e13c87e20326	1930322 C	Q. Search	☆	Ł
		08/24								
Date	Туре:	Posti	ng Date 🚩							
Data	available startin	g: 10/10/201	4	Search						
SEARCH	H RESULTS	5								
Expand All	<u>Collapse All</u>								Search Total: 2,123.69	
∞ 🔒	3							Page 1 of 1	Page Go	
Detail	Reviewed	Approved	Posting Date	Transaction Date	Description	Transaction Amount	Tax Amount	Alternate Tax Amount Additi	onal Information	
<u>&lt; 11</u>			08/08/2017	07/28/2017	GRAYMAC 806-6222248, TX -79118-6130	(135.00)				
<li>4 In</li>			08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA -50021	159.00				
<u>&lt; 11</u>			08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA -50021	745.77				
< اك	Ê		08/04/2017	08/03/2017	PRAXAIR DISTRIBUTION I 05159656633, IA -50021	56.56				
<u> </u>	Ê		08/07/2017	08/04/2017	REPUBLIC SERVICES TRAS 08665765548, AZ -85054	504.37	86.04			
<u> </u>	Ê		08/10/2017	08/09/2017	WAGNER SUPPLY 08067472877, TX -79404	422.92				
<u>&lt; 11</u>			08/14/2017	08/11/2017	WAL-MART #0793 CANYON, TX -79015	9.44				
- <b>1</b>	Ê		08/17/2017	08/16/2017	WAGNER SUPPLY LUBBOCK, TX -79404	132.91				
ш /			08/24/2017	08/22/2017	SHOPPAS MATERIAL HAN FORT WORTH, TX -76155	227.72				

## **Transaction Approval Summary**

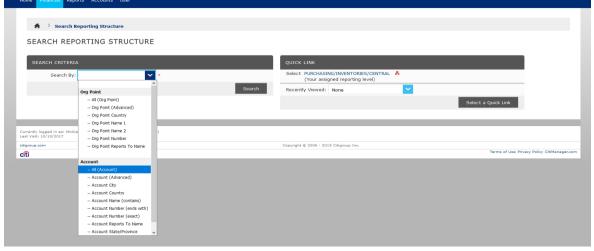
The Transaction Approval Summary can be used by Level / Group Managers to see which transactions have been reviewed and approved for the reporting period.

From the Home Screen, you will go to the Financial menu and select "Transaction Approval Summary."



You will be sent to a screen that looks like the one shown below. There are two different ways to view the approval summary.

**Option 1:** The first option is to search by a list of accounts. This option will give you a list of all of the accounts within your area to choose from.



The account list will populate at the bottom of the screen. From here, you can select the cardholder's summary that you would like to view.

SEARCH CRITERIA Search By: All (Account) Search Sea	EARCH REPORTING STRUCTURE EARCH CRITERIA Search By: All (Account)	s	Select PUR (You	CHASING/INVENTORIE ur assigned reporting l	level)	Se	Hect a Quick Link
SEARCH REPORTING STRUCTURE  SEARCH CRITERIA Search By: + All (Account)  Search	EARCH REPORTING STRUCTURE EARCH CRITERIA Search By: All (Account)	s	Select PUR (You	CHASING/INVENTORIE ur assigned reporting l	level)	Se	lect a Quick Link
SEARCH CRITERIA Search By: All (Account)  Search Search Search Search Search Search Page 1 of 1 Page to	Search By: All (Account) Search By: All (Account) Search	s	Select PUR (You	CHASING/INVENTORIE ur assigned reporting l	level)	Se	lect a Quick Link
SEARCH CRITERIA Search By: •• All (Account) • • • • • • • • • • • • • • • • • • •	Search By: All (Account) Search By: All (Account) Search	s	Select PUR (You	CHASING/INVENTORIE ur assigned reporting l	level)	Se	lect a Quick Link
Search By: All (Account)  Search By: All (Account)  Search  Sear	Search By: All (Account) 👻 =	s	Select PUR (You	CHASING/INVENTORIE ur assigned reporting l	level)	Se	lect a Quick Link
Search By: All (Account)  Search By: All (Account)  Search  Sear	Search By: All (Account) 👻 =	s	Select PUR (You	CHASING/INVENTORIE ur assigned reporting l	level)	Se	lect a Quick Link
Search     (Your assigned reporting level)       Search     Recently Viewed:       None     Select a Quick Link	Search	_	(You	ur assigned reporting I	level)	Se	lect a Quick Link
Search (four assigned reporting level) Recently Viewed: None Select a Quick Link SEARCH RESULTS Page 1 of 1 Page of	Search	R				Se	lect a Quick Link
Select a Quick Link SEARCH RESULTS Page 1 of 1 Page of		R	Recently Vie	ewed: None	×	Se	lect a Quick Link
SEARCH RESULTS Page 1 of 1 Page to	ARCH RESULTS					Se	lect a Quick Link
SEARCH RESULTS	ARCH RESULTS						
	ARCH RESULTS						
Page 1 of 1 Page 60	EARCH RESULIS						
							_
Cardholder Name 1         Cardholder Name 2         Account Number         City         State         Country         Reports To         Status						Page 1 of 1	Page Go
	Cardholder Name 1 Cardholder Name 2 Account Number Ci	ity	State	Country	Reports To		Status
A CANYON TX UNITED STATES PURCHASING/INVENTORIES/CENTRAL Active						CENTRAL	Activo
CANYON TX UNTED STATES PURCHASING/INVENTIONES/CENTRAL Inactive							
A         CANYON         TX         UNITED STATES         PURCHASING/INVENTORIES/CENTRAL         Inactive           A         CANYON         TX         UNITED STATES         PURCHASING/INVENTORIES/CENTRAL         Active	S. CA						
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		NYON	TX	UNITED STATES	PURCHASING/INVENTORIES/		Active

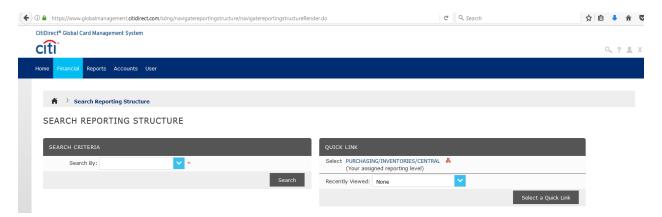
The next screen will ask you to select the date range for the approval summary. You can choose either the reporting cycle or select a date range. You will not be able to select a "to" date that is in the future, so keep that in mind when picking the date range.

me Finan	icial Reports	Accounts	s User					
A >	Search Repor	ting Structi	ure 🤇 Transaction	n Approval Summ	ary			
RANS	ACTION	APPRO	VAL SUMMAR	RY				
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Date	е Туре:	08/04/2017 to 08/24/2017 Posting Date		Review Status:	All		<b>×</b>	
	e Range:		08/04/2017	1				
		To:	08/24/2017					
Date	е Туре:		Posting Date	- -				
Data	a available star	ting: 10/10	/2014	Search				

## The Transaction Approval Summary will be shown on the next screen. You can click on the cardholder's name to view their transaction summary.

	XX10-8498 (Active) • PUR	210431196/1197EN	I ONLES/ CENTINAL - MICKLE SCA	WI BOX 01001 *	CMILLON, IX / JUIDUUUI			
accounts:		1						
ransactions & Adjust	ments:	9						
eviewed:		9						
ot Reviewed:		0						
pproved:		9						
lot Approved:		0						
EARCH CRITERIA			ADVANCED OPTIONS	;				
Reporting Cycle:	August 2017	~	Filter (starts with):	None	<b>~</b>			
Date Type:	08/04/2017 to 08/24/2017 Posting Date		Review Status:	All	<b>×</b>			
Date Range:	From: 08/04/2017	1						
	To: 08/24/2017							
		_						
Date Type:	Posting Date	~						
Data available sta	rting: 10/10/2014	Search	1					
ARCH RESUL	TS							
						Page Total: 2,123.69	Search Total: 2,123.69	
						Page 1 of 1	Page Go	
Account Name	<u>Transaction</u> Adjustment		Reviewed	Not Reviewed	Approved	Total	Net	
RANDY BROWN		<u>9</u> 0	90	<u>0</u>	<u>9</u>	2,123.69 0.00	2,123.69	
Total		<u>9</u>	90	<u>0</u>	<u>9</u>	2,123.69 0.00	2,123.69	
Total								

**Option 2:** Select the Quick Link for your reporting level to view all of the accounts within your department.



The next screen will ask you to select the date range. You can choose either the reporting cycle or select a date range. You will not be able to select a "to" date that is in the future, so keep that in mind when picking the date range.

Home Financial	Reports A	ccounts	User					
🔺 🔿 Sear	rch Reporting	Structu	re > Transaction Appro	val Summ	ary			
TRANSACT	TION AP	PRO	AL SUMMARY					
SEARCH CRIT	TERIA				ADVANCED OPTIONS			
Reporting	Cycle: A	August 2	.017		Filter (starts with):	None	~	
Date Type		/04/201 sting Da	7 to 08/24/2017 Ite		Review Status:	All		<b>~</b>
O Date Rang	ge:	From:	08/04/2017					
		To:	08/24/2017					
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The transaction approval summary will appear for all cardholders who have had activity in the date range you specified. You can click on the individual's name to view their transaction summary.

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	8498 (Active) • PU	RCHASING/INVEN	TORIES/CENTRAL - MICKIE SCA	NILING • WI BOX 61001 •	CANYON, 1X /90160001			
Accounts:		1						
Transactions & Adjust		9						
Reviewed:	ments.	9						
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SEARCH CRITERIA			ADVANCED OPTIONS					
<ul> <li>Reporting Cycle:</li> </ul>	August 2017	~	Filter (starts with):	None	<b>~</b>			
	08/04/2017 to 08/24/2017		Review Status:	All	<b>~</b>			
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## **Running Reports**

## 1. To run a report for a cardholder, select "RUN" from the Reports tab in the Home Screen.

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ALERT: Summary Previous 30 days	o	SCHEDULED REPORTS >		AFTER SEPT 17, IT WILL BE EA	SIER TO RUN,
MOST RECENT POSTING DATE 10/09/2017		COMPLETED REPORTS >		After September 17th, the process t	o create and run reports will cha More
O Previous 30 days	11	DATA FILES >		LINKS	
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RECENTLY ADDED ACCOUNTS >     Previous 30 days	0			CITIBANK CUSTOM REPORTING	>
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				GCMS REPORTING REFERENCE	GUIDE >
REVIEW REQUIRED			Total Items: 37 8/29	HOW TO SET YOUR BROWSER T	O TLS 1.1 AND
Previous 30 days					NS_RELEASE_13.3 >
TRANSACTIONS APPROVED/NOT APPROVED     Previous 30 days			0/37	CARDHOLDER_SELF- REGISTRATION_INSTRUCTION	\$ >
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## 2. On the next page select "Reporting Entity".

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Report Name: Select report below		
Search		
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3. Next, you can select the org point (department/account group) to run a report for all cardholders in the department, or you can click the "search" button to view the individual accounts within the department to run the report for one person.

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## 4. Leave everything as it is on Number 3 & 4

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Run		
1. Reporting Entity: MICKIE SCANTLING		~
2. Report Name: Accounting Code Detail		~
3. Co tAllocation Scheme: Select scheme below		~
4. File ars: Select filters below		~
5. Criteria: Select criteria below		~
6. Frequency: Once		~
7. Delivery Options and Notifications: System Inbox & MSCANTLING@WTAMU.EDU		~
Submit Request Cancel		

## 5. Check the box by "include splits" - <u>ALWAYS</u> – split or not!

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6. The next step is to select the frequency and date range for the report. You want the report to run according to the reporting cycle that you just allocated for. Then click "Submit Request".

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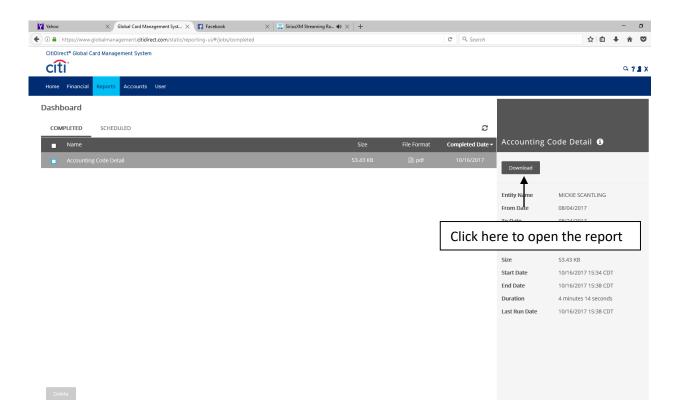
Note: The report will not run until the day after the cycle is over. For example, a report for the June 2017 billing cycle will not run until July 4<sup>th</sup>.

## 7. Return to the Home screen

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Note: The home screen is where you will check on the progress of your report. The report may take a while to run, depending on the number of transactions it covers.

- 8. Click "DASHBOARD" under Reports to see completed reports. You will also receive an email if you requested one.
- 9. Click on the name of the report to retrieve it and click "Download".



#### **10.** "Open with" to open your report as pdf.

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Home Financial Reports Accounts User				
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	Settings can be changed using the Applications tab in Firefox's Options.		Size	53.43 KB
	OK Cancel		Start Date	10/16/2017 15:34 CDT
			End Date	10/16/2017 15:38 CDT
			Duration	4 minutes 14 seconds
			Last Run Date	10/16/2017 15:38 CDT

The report may take a while to run depending on how many transactions you have.

Delete

The report will appear in an Adobe Acrobat document. Each cardholder's transactions will be listed on their own page within the document. Only the allocated transactions will appear on the report.

## **11.** This is an example of how the report should look.

	Posting Date: 0	ело В Rep Posting Date: 06/04/2017 - 07/03/2017				
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				Nicaragua		
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Split - copier rental purchasing						
Business & Finance	Department:		Account:			
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7406 - Equipment Rental	TASCOSA OFFICE MA					
06/26/2017	TASCOSA OFFICE MA	CHINEMWOOLSEY@YTOM,TX -7910			100.04	
	TASCOSA OFFICE MA	CHINEMWOOLSEY@YTOM,TX -7910			100.04	
06/26/2017	TASCOSA OFFICE MA	CHINEMWOOLSEY@YTOM,TX -7910 Purchasing/Inventories/C entral Supply	Account:	11078500362 - Central Supply	100.04	
	USA Transaction Date 06/02/2017 Donuts for Donut Day purchasing an Fine Arts & Humanities 6012 - Food 06/22/2017 Lunch for staff - cleaning Cld Ed ro	USA           Transaction Date         Description           06/02/017         SQU SQ DENJAMIN D           Donuts for four Ubp yourchasing and central suppl- ist div         More SQU Density for Central Suppl- ist div           012 - Food         Goods Received:           06/22/017         PEPTOS MEXCAN R           Uunch for fair - ceaning Old Ed foom - list and meal form at         Fine Arts & Humanities           Fine Arts & Humanities         Department:           0912 - Food         Goods Received:           0912 - Food         Goods Accord FICE Me           5/81 - coper rental purchasing         S/81 - coper rental purchasing	USA           Transaction Date         Description           06/02/2017         SQJ SQ, BENJAMN DONUT/MARILLO,TX-79109           Donuts for Donut Day purchasing and central supply- text of who ate in back up         English, Philosophy, Modern Languages           Fine Arts & Humanities         Department:         English, Philosophy, Modern Languages           6012 - Food         Goods Realived:         Yes           96222017         PEPTIGS MARCAR BESCAMYON TX.79015         Lunch for staff - cleaning Old Ed noon - list and meal form attached           Fine Arts & Humanities         Department:         English, Philosophy, Modern Languages           6012 - Food         Goods Received:         Yes           08282017         TASCOSA OFFICE MACHINEM/WOOLSEY(WTM,TX-7910 Self - coger rental purchasing           0912 - Food         Goods Received:         Yes           08282017         TASCOSA OFFICE MACHINEM/WOOLSEY(WTM,TX-7910 Self - coger rental purchasing           Business & Finance         Department:         Purchasing/inventories/C	USA           Turnsaction Date         Description           06/02/017         SQU SQ ENLAMIN DONUT/MARULLO,TX79109           Donuts for form Uary purchasing and central supply - Ist of who after in back us         English, Philosophy, Account:           Fine Arts & Humanities         Department:         English, Philosophy, Account:           6012-2017         Groots Reserved:         Yes           9692-2017         PEPTOTS MEXICAI RESCAMPOINTX79016         Lunch for staff - cleaning Old Ed room - list and meal from attached           Fine Arts & Humanities         Department:         English, Philosophy, Modern Languages         Account:           6012-Food         Goods Reserved:         Yes         Secologing Totage           6012-Food         Goods Reserved:         Yes         Secologing Totage           6012-Food         Goods Reserved:         Yes         Secologing Totage           6012-Food         Goods Reserved:         Yes         Secologing Totage         Secologing Totage           680-20017         TascosSa OFFICE MACHINEMWOOLSEY@YTOM,TX-79101         Secologing Totage         Sec	USA           Turnsaction Date         Description           06/02/017         SQU SQ EENJAMN DONUT/MARILLO,TX79109           Donuts for form Uary purchasing and central supply - tail of who afte in back us         Fine Arts & Humanities           Fine Arts & Humanities         Department:         English, Philosophy, Modern Languages         Account:         1107/2001892 - EPML           6912 - Food         Goods Reselwed:         Yes         Modern Languages         Incidental Fee           9.692/2017         PEPTICS MIXAN RESCAMVOITX - 79016         Lunch for staff - cleaning Old Ed room - list and meal form attached         1107/2022 EPML           Fine Arts & Humanities         Department:         English, Philosophy, Modern Languages         Account:         1107/2022 EPML           6012 - Food         Goods Reselwed:         Yes         Norangua         Stud, Accound Nicangua           6012 - Food         Goods Reselwed:         Yes         Stud, Accound Nicangua         Stud, Accound Nicangua           6012 - Food         Goods Reselwed:         Yes         Stud, Accound Nicangua         Stud, Accound Nicangua           6012 - Food         Goods Reselwed:         Yes         Stud, Accound Nicangua         Stud, Accound Nicangua           6012 - Food         Goods Reselwed:         Yes         Stud, Accound Nicangua         Nicangua           681 -	

## **User Summary**

The User Summary screen is used to show a list of all of the users within a department.

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#### You can search by User ID, User Name, and/or User Type.



## The next page will show a list of users in your department.

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SEARCH F	<b>a</b>	<u>User ID</u>	User Type	User Status	<u>Last Login</u>	Template	Two-Factor Authentication	Account Number	.o
	<b>a</b>		<u>User Type</u>			-	Two-Factor	Account Number	io
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder	Two-Factor Authentication No No	Account Number XXXX-XXX0-XX86-3130 XXXX-XXXX-XX55-7486	10
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Two-Factor Authentication No No	Account Number XXXXX-XXXX6-3130 XXXXX-XXXX5-7486 XXXXX-XXXX-XXX94-6655	<b>10</b>
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Two-Factor Authentication No No No No	Account Number XXXX+XXX8-3130 XXXX+XX55-7486 XXXX+XX94-6655 XXXX+XX94-6655 XXXX+XX94-6655	6
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Two-Factor Authentication No No No No No	Account Number XXXXX-XXXX6-3130 XXXXX-XXXX5-7486 XXXXX-XXXX-XXX94-6655	
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Level Manager	Two-Factor Authentication No No No No No No No	Account Number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Two-Factor Authentication No No No No No No No No	Account Number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Two-Factor Authentication No No No No No No No No No	Account Number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Two-Factor Authentication No No No No No No No No	Account Number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	8
	<b>a</b>		User Type			Template WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Two-Factor Authentication No No No No No No No No No No No No No	Account Number X000-X000-X086-3130 X000-X000-X085-7486 X000-X000-X023-5960 X000-X000-X023-5960 X000-X000-X071-1174 X000-X000-X071-1174 X000-X000-X071-119488 X000-X000-X055-7395	

You can click on the link under their user ID to view their information such as the User ID, password, and email address.

You can also select the option to "email new password" if you need to reset a password for the cardholder. The cardholder will receive an email with a temporary password in order to log in. Temporary passwords are only valid for 24 hours.

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USER INFORMATION					
* Display Name:			Phone Number:		
* First Name:			* Status Code:	ACTIVE	
* Last Name:				Clear Dual Authentication Lock	
User ID:					
Last Password Change:	08/07/2017 14:35:14 CST	Clear Security Question			
	E-mail New Password				
* E-mail Address:	MSCANTLING@WTAMU.				
* Confirm E-mail Ac	IG@WTAMU.E				
USER ROLE INFORMATION					
User Role:	Cardholder User	REGIONAL SETTINGS			
* Template:	WTAMU Cardholder	Date and Time Settings			
Entity Name:		* Date Style:	MM/DD/YYYY		
Account Number:	XXXX-XXXX-XX71-1174	* Time Zone:	Central Standard Time (		
Account Status:	Active	Number Settings			
ADDITIONAL INFORMATION		* Decimal Digits:	2		
		* Display Format:	XX,XXX.XX		
Additional Information:	h.	PREFERRED E-MAIL			
		Settings for Transaction Summa E-mail Addresses:	ary E-mail		

From the user summary list, you can also click on the "account number" field to view account information.

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SEARCH RESULTS	_	_	_	-			Page 1 of 1 Page	Go
SEARCH RESULTS	<u>User ID</u>	<u>User Type</u>	<u>User Status</u>	<u>Last Login</u>	Template	Two-Factor Authentication	Assount Number	Go
<ul> <li>Display Name</li> </ul>	<u>User ID</u>	<u>User Type</u>	<u>User Status</u>	<u>Last Login</u>	WTAMU Cardholder	Authentication No	Account Number XXXX-XXXX-XX86-3130	Go
Display Name	<u>User ID</u>	<u>User Type</u>	<u>User Status</u>	<u>Last Login</u>	WTAMU Cardholder WTAMU Cardholder	Authentication No No	Account Number XXXX-XXXX-XX86-3130 XXXX-XXXX-XX55-7486	Go
Display Name	<u>User ID</u>	<u>User Type</u>	<u>User Status</u>	Last Login	WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Authentication No No No	Account Number XXXX-XXX86-3130 XXXX-XXXX5-7486 XXXX-XXXX5-7486	Co
Display Name	User ID	<u>User Type</u>	<u>User Status</u>	Last Login	WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Authentication No No No No	Account Number XXXX-XXXX-XX8-3130 XXXX-XXXX-XX5-7486 XXXX-XXXX-XX94-6655 XXXX-XXX2-5960	Ga
Display Name	User ID	User Type	<u>User Status</u>	LastLogin	WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Authentication No No No	Account Number XXXX-XXX86-3130 XXXX-XXXX5-7486 XXXX-XXXX5-7486	Co
Display Name	<u>User ID</u>	User Type	User Status	LastLogin	WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Authentication No No No No No No No No	Account Number XXXX-XXXX-XX8-3130 XXXX-XXXX-XX5-7486 XXXX-XXXX-XX94-6655 XXXX-XXX2-5960	Go
Display.Name	User ID	User Type	User Status	Last Login	WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Level Manager	Authentication No No No No No	Account Number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	60
Display Name	User ID	<u>User Type</u>	<u>User Status</u>	Last Login	WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Level Manager WTAMU Level Manager	Authentication No	Account Number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	50
Display.Name	<u>User ID</u>	User Type	User Status	Last Login	WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Authentication No	Account Number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Ga
Display Name	<u>User ID</u>	<u>User Type</u>	<u>User Status</u>	Last Login	WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder WTAMU Cardholder	Authentication No	Account Number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	

## This screen shows some user information, as well as the user's transaction limits.

COUNT INFORMATIO	л	ADDITIONAL DETAIL		
Account Name:		User ID:		
Account Number:	XXXX-XXXX-XX46-8500	Reports To:	PURCHASING/INVENTORIES/C	
Address Line 1:	WT BOX 61001	Reports To Org Point Number:	5131230007400285004€	
City:	CANYON	Last Data Load Update:	03/25/2016	
State / Province:	тх	Account Manager Acces Permitted:	S No	
Postal Code:	790160001	Additional Information:		
Country:	UNITED STATES	Transfer From Account Number:		
Currency:		Transfer To Account Nur	nber:	
Phone Number:	8066512099	Transfer Reason Code:		
-mail Address:	TSTAMPS@WTAMU.EDU	Transfer Date:		
ffective Date:	08/19/2015			
Product Type:	Individual			
Account Status:	Active			
Tax Exempt:	Ν			
RANSACTION LIMITS		ACCOUNTING CODE INF	FORMATION	
edit Limit:	10,000.00			
ngle Transaction Amou	4	Click hor	a to coo the cordhold	lors single transaction lim
aily Limit Amount:	0.00	CIICK Ner	e to see the cardhold	lers single transaction lim