

## Query Procard Information



This job aid describes the procedure for running queries related to Procard information.

**Step 1.** Log into the Finance Application with your FIN Username and Password.



**Navigate to the following path:**

**Reporting Tools → Query → Query Viewer**

**OR**

**Report Center → Finance ( or Grants ) → Query Viewer**

The **Query Viewer** page opens.



**Query Viewer**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

\***Search By:** Query Name  begins with

[Advanced Search](#)

**Step 2.** Enter the query name information in the **begins with** field.

**Step 3.** Click .

The **Query Viewer** page displays the search results.

**Query Viewer**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By:  begins with

[Advanced Search](#)

**Search Results**

\*Folder View:

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
PO_PCD_OPEN_BY_DEPTID	PCD Open to Reall by DeptID	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>
PO_PCD_POSTED_BY_DEPTID	Procard trans posted by DeptID	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>
PO_PCD_TRANS_BY_EMPLID	Procard trans by Employee ID	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>



In the Production database, three Procard public queries will be available for use. These three Procard public queries are listed below, along with their descriptions:

- ◆ **PO\_PCD\_POSTED\_BY\_DEPTID** – displays transactions that have posted to the GL that are no longer open for reallocation by department ID number, date range
- ◆ **PO\_PCD\_OPEN\_BY\_DEPTID** – displays Procard transactions in open status (available for reallocation and/or approval) by department ID number, date range
- ◆ **PO\_PCD\_TRANS\_BY\_EMPLID** – displays Procard transactions by employee ID number, date range

**Step 4.** Click the [Excel](#) link or the [HTML](#) link on the row corresponding to the appropriate query.

A new window opens.

**PO\_PCD\_POSTED\_BY\_DEPTID - Procard trans posted by DeptID**

Enter Bank Code (ex: WMC-Worc):

Trans Date Begin:

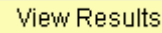
Trans Date End:

Dept Starts with:

ID	Name	Account	Trans Date	Merchant	Amount	Fund	Dept	Program	Class	Project	Account	Voucher	Line	Tran Nbr
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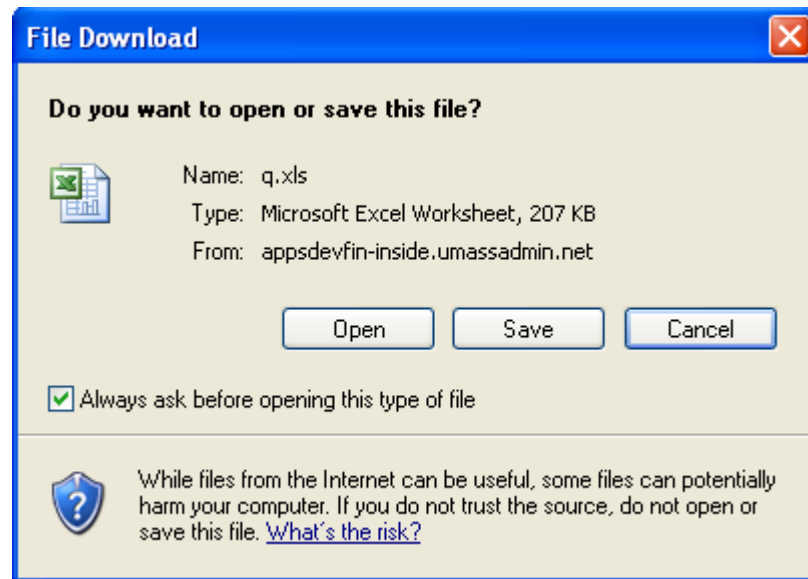
**Step 5.**

Enter the criteria information for the query and click



The **Bank Code** for Dartmouth is **DMC**.

A message box displays.



**Step 6.**

Click



to open the file for viewing, or click



to save it to your computer.

An Excel or HTML document opens and displays the query results.

Procard posted by DeptID	ID	Account	Tran Nbr	Bill Dt	Amount	Merchant	Account	Dept
Smith, James	10023456	XXXXXXXXXXXX4911	0311475	1/17/2006	5.850	W.B. MASON CO INC.	734200	W843500000
Smith, James	10023456	XXXXXXXXXXXX4911	0314344	1/26/2006	71.380	TECHNOLOGY RESOURCE CT	734200	W843500000
Smith, James	10023456	XXXXXXXXXXXX4911	0314900	1/27/2006	35.760	W.B. MASON CO INC.	734200	W843500000
Smith, James	10023456	XXXXXXXXXXXX4911	0307735	1/3/2006	36.860	W.B. MASON CO INC.	734200	W843500000
Smith, James	10023456	XXXXXXXXXXXX4911	0308246	1/4/2006	7.000	WATER DELSV 800444PURE	734200	W843500000