Purchasing/Team Card Procedure
Using the My Wallet Pivot Grid

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I. Objectives

By the end of this procedure, you should be able to:

- Add the My Wallet Pivot grid to your home page
- Use the My Wallet Pivot grid to search for unassigned cardholder transactions.

II. Add the My Wallet Pivot Grid to the Home Page

Step 1: Open the Content link on the home page

![Image of PeopleSoft Home page with Content link highlighted]
Step 2: Select the USC My Wallet Transactions pagelet

Step 3: Review the placement of the pivot grid pagelet

The pivot grid is displayed on the left side of the page
Step 4: Open the Layout link on the home page

Step 5: Move the Pivot grid to the right column

- Click the pivot grid (pagelet) and move it to the right column
**Step 6:** Save the Home page personalization settings.

**Step 7:** The Pivot Grid layout change is displayed.
III. Using the My Wallet Pivot Grid

Step 1: Expand the Cardholder column
Step 2: Cardholders with transactions are displayed

Cardholders with transactions in PeopleSoft are displayed
### Step 3: Select unassigned transactions

Select the transaction status and uncheck "assigned" to see unassigned transactions only.
Step 4: Drag a filter to use as a column

![Diagram](image_url)

Click and Hold

Drag and Release
Step 5: Save your arrangement of rows and columns
Step 6: Expand the Column by clicking the plus sign

<table>
<thead>
<tr>
<th>Transaction Status</th>
<th>Assigned</th>
<th>Unassigned</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>335</td>
<td>162</td>
</tr>
<tr>
<td></td>
<td></td>
<td>173</td>
</tr>
</tbody>
</table>
Step 7: Drill down by clicking the transaction count

Click on a count to drill down

Step 8: The pivot grid drilldown is displayed.
Step 9:  To open the my wallet page, select the actions/my wallet dropdown

<table>
<thead>
<tr>
<th>Cardholder ID</th>
<th>Actions</th>
<th>Cardholder Employee ID</th>
<th>Cardholder Name</th>
<th>Liaison Name</th>
<th>Transaction Date</th>
<th>Posting Date</th>
<th>Transaction Amount</th>
<th>Merchant</th>
</tr>
</thead>
<tbody>
<tr>
<td>U35501472</td>
<td></td>
<td>1089681</td>
<td>BAILEY, LARRY</td>
<td>ARNOLD, CANDACE</td>
<td>2018-07-17</td>
<td>2018-07-18</td>
<td>1437.500</td>
<td>B&amp;H PHOTO MOTO</td>
</tr>
<tr>
<td>U35501472</td>
<td></td>
<td>1089681</td>
<td>BAILEY, LARRY</td>
<td>ARNOLD, CANDACE</td>
<td>2018-07-16</td>
<td>2018-07-17</td>
<td>441.000</td>
<td>LEVY MARKETING &amp; AWARD</td>
</tr>
<tr>
<td>U35501472</td>
<td></td>
<td>1089681</td>
<td>BAILEY, LARRY</td>
<td>ARNOLD, CANDACE</td>
<td>2018-07-14</td>
<td>2018-07-16</td>
<td>1086.250</td>
<td>ATAGO U.S.A INC.</td>
</tr>
<tr>
<td>U35501472</td>
<td></td>
<td>1089681</td>
<td>BAILEY, LARRY</td>
<td>ARNOLD, CANDACE</td>
<td>2018-07-13</td>
<td>2018-07-13</td>
<td>39.000</td>
<td>DMI* DELL CORP BUS</td>
</tr>
</tbody>
</table>
Step 10: The “Review My Wallets Receipts” page for that cardholder is displayed in a new browser window.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Date</td>
<td>Mark for Delete</td>
</tr>
<tr>
<td>Through</td>
<td>Account Number</td>
</tr>
<tr>
<td>*Receipt Data Source</td>
<td>Date</td>
</tr>
<tr>
<td>*Transaction Status</td>
<td>Expense Type</td>
</tr>
<tr>
<td>Account Number</td>
<td>Merchant</td>
</tr>
<tr>
<td>All Data Sources</td>
<td>Additional Details</td>
</tr>
</tbody>
</table>

From Date: 07/20/2017  Through: 07/20/2018

Transaction Status: Unassigned

Account Number:
Step 11: To return to the pivot grid, click the browser page.

To return to the my wallet pivot grid, click the Pivot Grid Viewer page.

Click Return to close the Pivot Grid Drilldown.
Step 12: Additional filters may be applied if necessary to search for transactions.

Step 13: To limit the result to a range of posting dates, select prompts in the gear or settings icon.
Step 14: Change the from and to dates to the correct posting date range and click OK.

Please remember that this pivot grid may be enhanced or changed as we continue to use it and receive feedback, so there may be additional filters and prompts added to make the tool easier to use.