

**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

From the PeopleSoft Home page, click the "Content" link

Step 2: Select the USC My Wallet Transactions pagelet

Personalize Home Page

Personalize Content:

Tab Name: My Page

Welcome Message: _____

Choose Pagelets: Simply check the items that you want to appear on the page. Remember to click "Save" when done.

Arrange Pagelets: Go to: Personalize Layout

PeopleSoft Applications

- Menu
- Activity Guides - In Progress
- Menu - Classic
- Top Menu Features Description
- My Reports
- Main Menu
- Sign In

Travel and Expenses


- USC My Wallet Transactions

Save Cancel


Save

Step 3: Review the placement of the pivot grid pagelet

Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.



Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.



USC My Wallet Transactions

Pivot Grid

Liaison Name: ARNOLD,CANDACE Posting Date: (All)

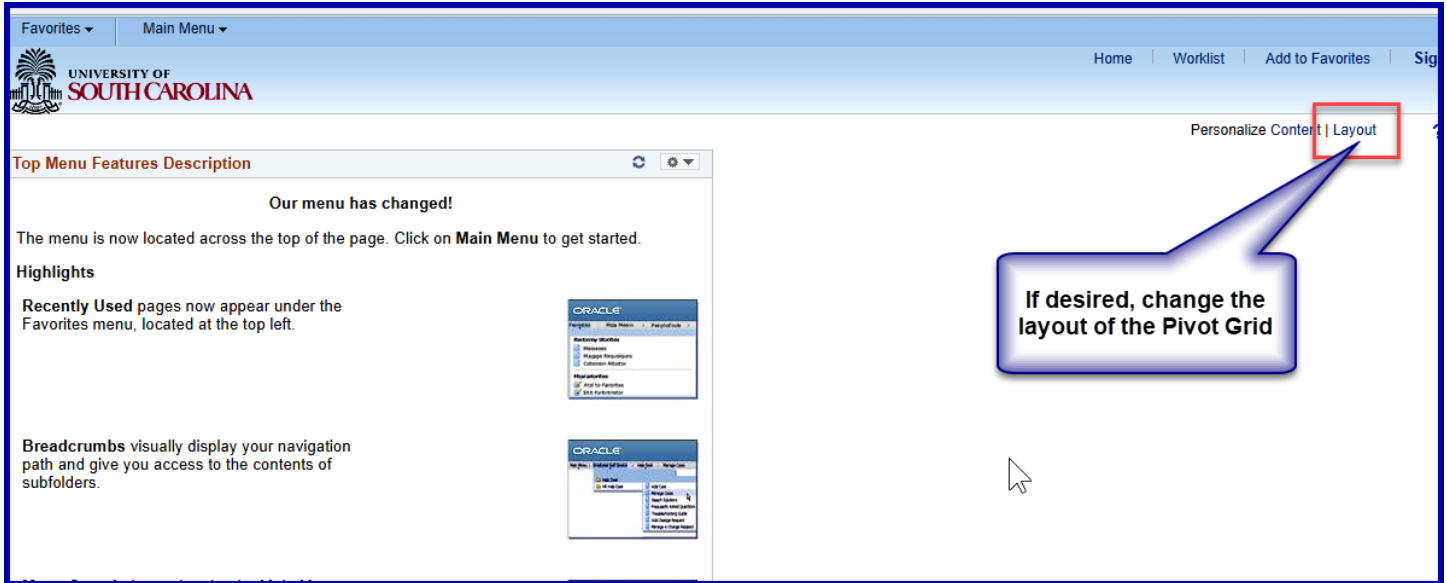
Merchant: (All) Expense Type: (All)

Transaction St...: (All)

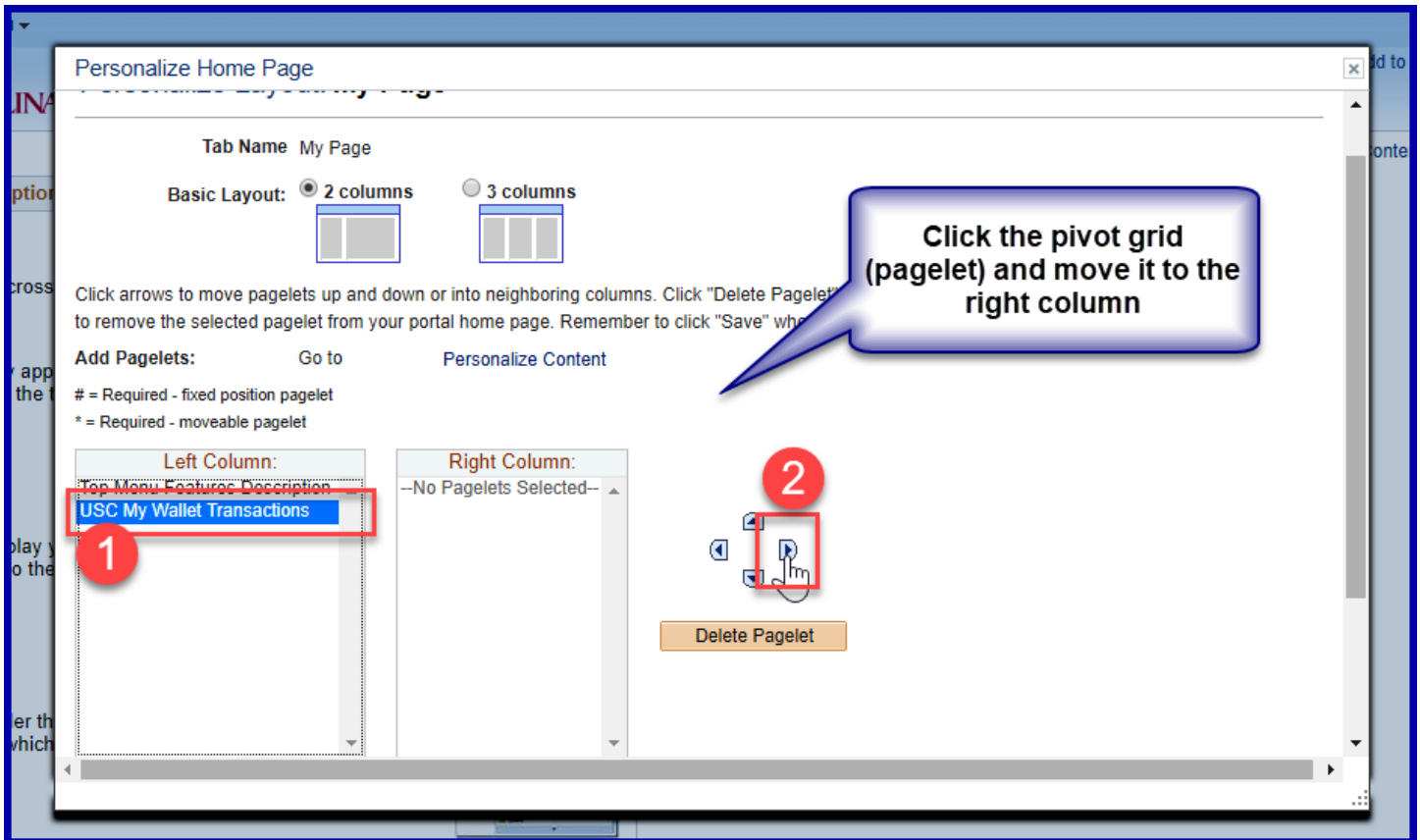
Data Source (Count)	
Cardholder	181

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



Step 6: Save the Home page personalization settings.

Personalize Home Page

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to **Personalize Content**

= Required - fixed position pagelet
* = Required - moveable pagelet

Left Column:
Top Menu Features Description

Right Column:
USC My Wallet Transactions

Navigation arrows and **Delete Pagelet** button.

Save (highlighted), **Cancel**, **Notify**

Save the home page (Callout bubble)

Step 7: The Pivot Grid layout change is displayed

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Home | Worklist | MultiChannel Console | Performance Trace | Add to Favorites | Sign out

Personalize Content | Layout ? Help

Top Menu Features Description

Our menu has changed!

The menu is now located across the top of the page. Click on **Main Menu** to get started.

Highlights

Recently Used pages now appear under the Favorites menu, located at the top left.

Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.

USC My Wallet Transactions

Pivot Grid Collapse All

Liaison Name: ARNOLD,CANDACE Posting Date: (All)

Merchant: (All) Expense Type: (All)

Transaction St... (Transaction Status)

Data Source (Count)	
Cardholder	335

III. Using the My Wallet Pivot Grid

Step 1: Expand the Cardholder column

The screenshot displays the 'USC My Wallet Transactions' Pivot Grid. The filters are set as follows:

- Liaison Name: ARNOLD,CANDACE
- Merchant: (All)
- Posting Date: (All)
- Expense Type: (All)
- Transaction St...: (All)

The data source is 'Data Source (Count)', and the table shows:

Data Source (Count)	Count
Cardholder	181

A red box highlights the '+' icon next to 'Cardholder', and a callout bubble points to it with the text 'Expand the cardholder column'.

Step 2: Cardholders with transactions are displayed

Favorites ▾
Main Menu ▾

Home | Worklist | Add to Favorites | Sign out

Personalize Content | Layout | ? Help

Top Menu Features Description

Our menu has changed!

The menu is now located across the top of the page. Click on **Main Menu** to get started.

Highlights

Recently Used pages now appear under the Favorites menu, located at the top left.

Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.

Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.

USC My Wallet Transactions

⚙️ ?
Collapse All | 🗖️ 📄

Pivot Grid

Liaison Name: **ARNOLD,CANDACE** Posting Date: (All) ▾

Merchant: (All) ▾ Expense Type: (All) ▾

Transaction St...: (All) ▾

Data Source (Count)	
Cardholder	181
ARNOLD,CANDACE	26
AUSTIN,RUSHTON	12
BAILEY,LARRY	2
BEARD,RODNEY	3
BOSWELL,PENNY	27
COGGIN,KRISTIN	12
CONLEY,MORGAN	7
COX,CORNICE	1
DERRICK,BENJAMIN	1
EPLEY,KEVIN	6
FRIEDMAN,KACEY	19
GOFFI,JOSHUA	13
GROOMS,DUANE	2
HICKMAN,MARIA	4
JACKSON,ANDRE	5
JORDAN,CYNTHIA	1
LUBEROFF,BARBARA	16
LUSK,TYSON	3
MARTIN,EMMIE	1
MAYES,ERIN	3
OWENS,STANLEY	2
SHERRITT,WILLIAM	6
SORREL,RUTH	5
SPRAGUE,LINDSAY	1
THOMAS,CHANELL	3

Cardholders with transactions in PeopleSoft are displayed

Step 3: Select unassigned transactions

Personalize Content | Layout

USC My Wallet Transactions

⚙️ ?

▼ Pivot Grid Collapse All | 🗑️ 📄

Liaison Name ARNOLD,CANDACE Posting Date (All) ▼

Merchant (All) ▼ Expense Type (All) ▼

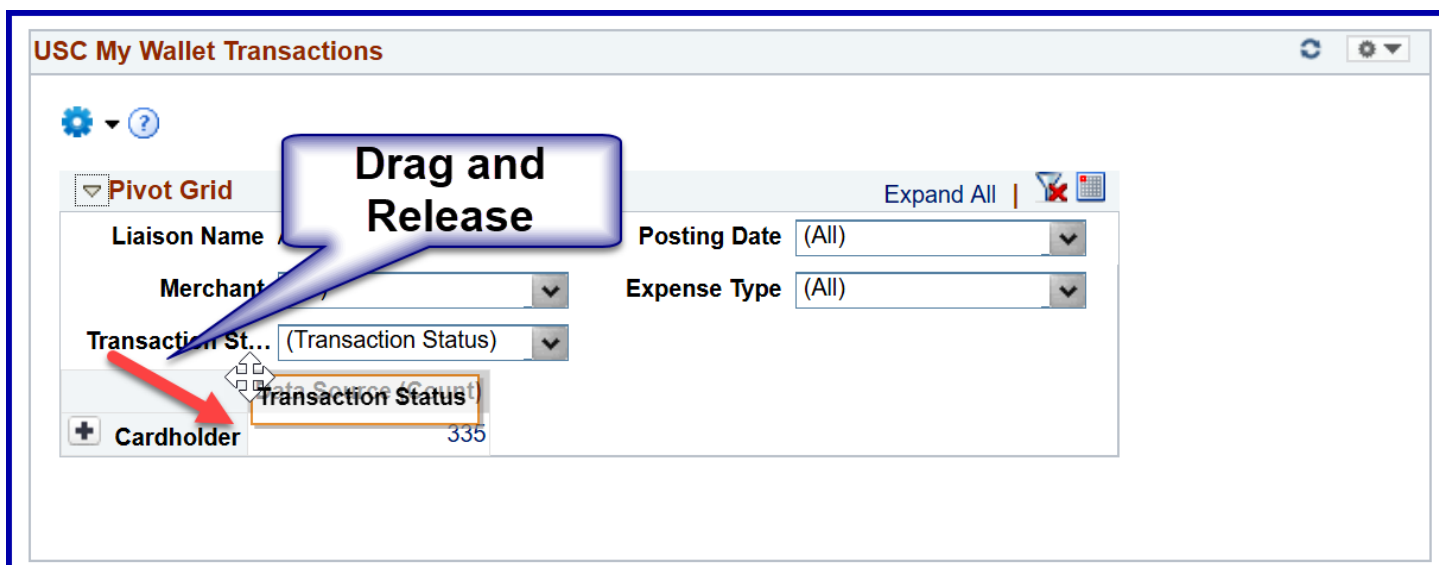
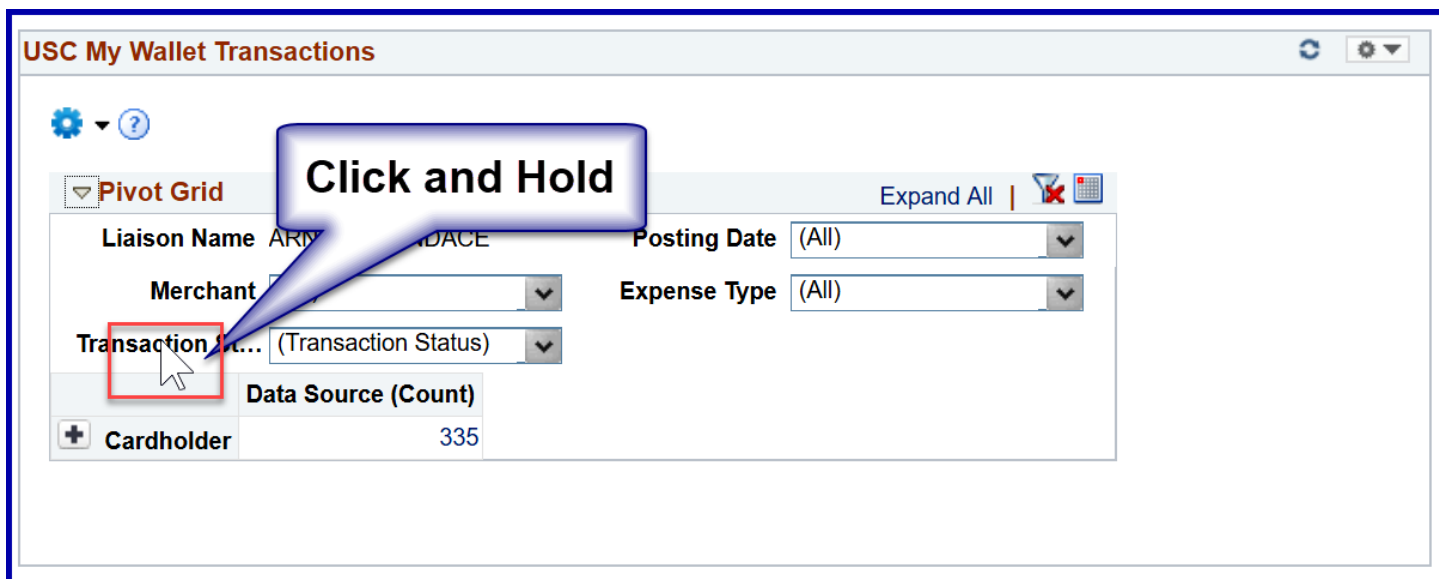
Transaction St... (All) ▼

Cardholder	Assigned	Unassigned	(int)
ARNOLD,CANDACE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	181
AUSTIN,RUSHTON	<input type="checkbox"/>	<input type="checkbox"/>	12
BAILEY,LARRY	<input type="checkbox"/>	<input type="checkbox"/>	2
BEARD,RODNEY	<input type="checkbox"/>	<input type="checkbox"/>	3
BOSWELL,PENNY	<input type="checkbox"/>	<input type="checkbox"/>	27
COGGIN,KRISTINA	<input type="checkbox"/>	<input type="checkbox"/>	12
CONLEY,MORGAN	<input type="checkbox"/>	<input type="checkbox"/>	7
COX,CORNICE	<input type="checkbox"/>	<input type="checkbox"/>	1
DERRICK,BENJAMIN	<input type="checkbox"/>	<input type="checkbox"/>	1

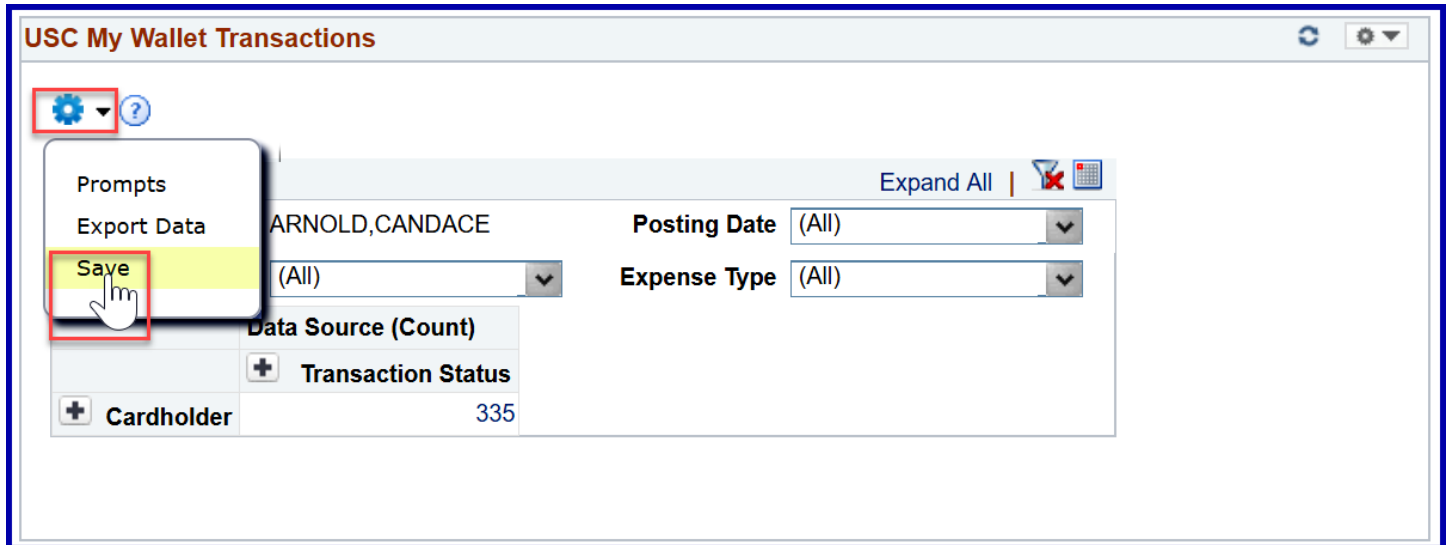
OK Cancel

Select the transaction status and uncheck "assigned" to see unassigned transactions only

Step 4: Drag a filter to use as a column



Step 5: Save your arrangement of rows and columns



Step 6: Expand the Column by clicking the plus sign

The screenshot shows the 'USC My Wallet Transactions' Pivot Grid. The filters are: Liaison Name: ARNOLD,CANDACE; Merchant: (All); Posting Date: (All); Expense Type: (All). The data table has two columns: 'Data Source (Count)' and 'Transaction Status'. The 'Cardholder' row shows a count of 335. A red box highlights a plus sign icon next to the 'Transaction Status' column header, with a hand cursor pointing to it.

	Data Source (Count)	Transaction Status
+ Cardholder	335	

The screenshot shows the same 'USC My Wallet Transactions' Pivot Grid, but the 'Transaction Status' column is now expanded. A red box highlights the expanded section, which includes a minus sign icon and sub-columns for 'Assigned' and 'Unassigned'. The 'Cardholder' row now shows counts of 335, 162, and 173.

	Data Source (Count)	Transaction Status	
		Assigned	Unassigned
+ Cardholder	335	162	173

Step 7: Drill down by clicking the transaction count

USC My Wallet Transactions

Pivot Grid Collapse All |

Liaison Name ARNOLD,CANDACE **Posting Date** (All)

Merchant (All) **Expense**

	Data Source (Count)		Unassigned
	Assigned	Unassigned	
Cardholder	335	162	
ARNOLD,CANDACE	39	1	38
AUSTIN,RUSHTON	19	0	19
BAILEY,LARRY	4	0	4
BEARD,RODNEY	5	0	5
BOSWELL,PENNY	59	54	5
COGGIN,KRISTIN	49	31	18

Click on a count to drill down

4

Step 8: The pivot grid drilldown is displayed.

[Favorites](#) | [Main Menu](#) | [Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Performance Trace](#) | [Add to Favorites](#) | [Sign out](#)

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Pivot Grid Drilldown

Detailed Data Personalize | Find | View All |

Cardholder ID	Actions	Cardholder Employee ID	Cardholder Name	Liaison Name	Transaction Date	Posting Date	Transaction Amount	Merchant	Description	Expense Type	Visa Transaction
U35501472	Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-17	2018-07-18	1437.500	B&H PHOTO MOTO		OTHER SUPPLIES	2444500819830046581531
U35501472	Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-16	2018-07-17	441.000	LEVY MARKETING & AWARD		CONTR SERVICES	2468720819701708184980
U35501472	Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-14	2018-07-16	1086.250	ATAGO U.S.A INC.		OTHER SUPPLIES	2469216819510092508054
U35501472	Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-13	2018-07-13	39.000	DMI* DELL CORP BUS		DATA PROCESSING SUPPLIES	2469216819410011228970

[Return](#)

BEARD,RODNEY 5 0 5

Step 9: To open the my wallet page, select the actions/my wallet dropdown

Pivot Grid Drilldown

Detailed Data

Cardholder ID	Actions	Cardholder Employee ID	Cardholder Name	Liaison Name	Transaction Date	Posting Date	Transaction Amount	Merchant
U35501472	▼ Actions	1089381	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-17	2018-07-18	1437.500	B&H PHOTO MOTO
U35501472	My Wallet	1089381	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-16	2018-07-17	441.000	LEVY MARKETING & AWARD
U35501472	▼ Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-14	2018-07-16	1086.250	ATAGO U.S.A INC.
U35501472	▼ Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-13	2018-07-13	39.000	DMI* DELL CORP BUS

Return

BEARD,RODNEY 5 0 5

Step 10: The "Review My Wallets Receipts" page for that cardholder is displayed in a new browser window

My Wallet

Review My Wallet Receipts

LARRY BAILEY

Search Criteria ?

From Date Through

*Receipt Data Source ▼

*Transaction Status ▼

Account Number ▼

Details ?

Mark for Delete	Account Number	Date	Expense Type	Merchant	Additional De
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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.

Cardholder ID	Actions	Cardholder Employee ID	Cardholder Name	Liaison Name	Transaction Date	Posting Date	Transaction Amount	Merch
U35501472	Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-17	2018-07-18	1437.500	B&H MOT
U35501472	Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-16	2018-07-17	441.000	LEVY MAR & AW
U35501472	Actions	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-14	2018-07-16	1086.250	ATAC INC.
U35501472	Actions	1089881	BAILEY,LARRY					DMI* COR

Click Return to close the Pivot Grid Drilldown

BEARD,RODNEY	5	0
BOSWELL,PENNY	59	54

Step 12: Additional filters may be applied if necessary to search for transactions.

USC My Wallet Transactions

Pivot Grid Collapse All | [X] [Grid]

Liaison Name: ARNOLD,CANDACE Posting Date: (All)

Merchant: (All) Expense Type: (All)

Data Source (Count)

	Transaction Status		
		Assigned	Unassigned
Cardholder	335	162	173
ARNOLD,CANDACE	39	1	38
AUSTIN,RUSHTON	19	0	19
BAILEY,LARRY	4	0	4
BEARD,RODNEY	5	0	5
BOSWELL,PENNY	59	54	5
COGGIN,KRISTIN	49	31	18

Expense Type Selection:

- (Select All)
- ADVERTISING
- AIR TRAVEL
- AUTO RENTAL
- CELLULAR/WIRELE
- CONTR SERVICES
- DATA PROCESSING

OK Cancel

Step 13: To limit the result to a range of posting dates, select prompts in the gear or settings icon.

USC My Wallet Transactions

[Gear Icon] [?] Collapse All | [X] [Grid]

Liaison Name: ARNOLD,CANDACE Posting Date: (All)

Merchant: (All) Expense Type: (All)

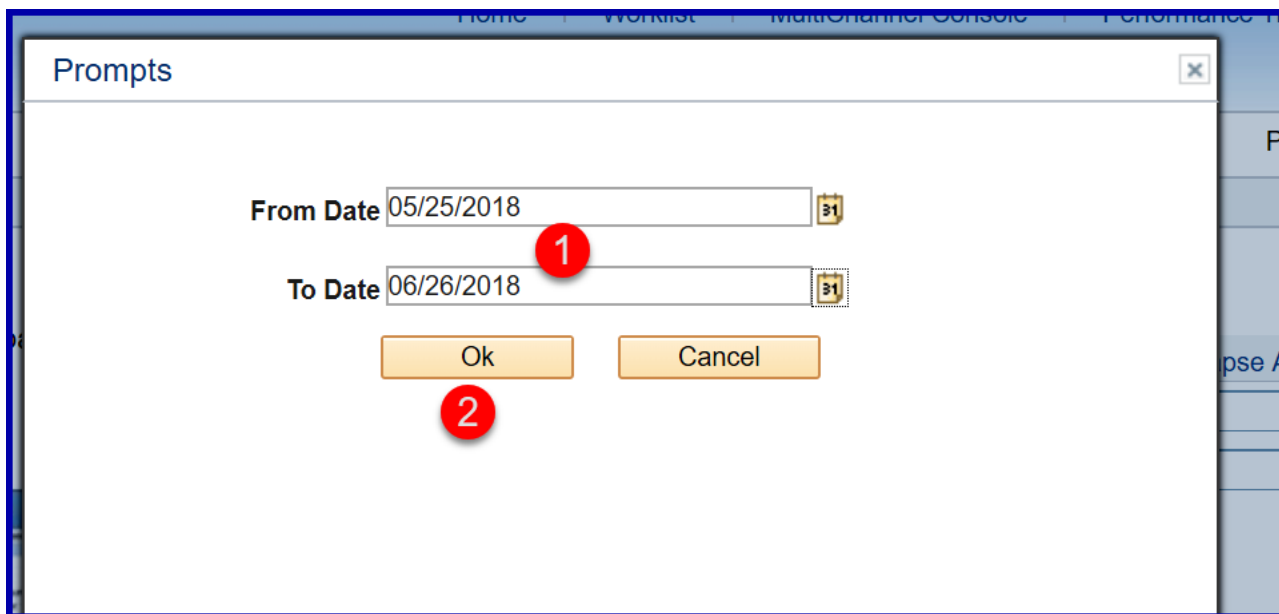
Data Source (Count)

	Transaction Status		
		Assigned	Unassigned
Cardholder	335	162	173
ARNOLD,CANDACE	39	1	38
AUSTIN,RUSHTON	19	0	19

Settings Menu:

- Prompts** (highlighted)
- Export Data
- Save

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.