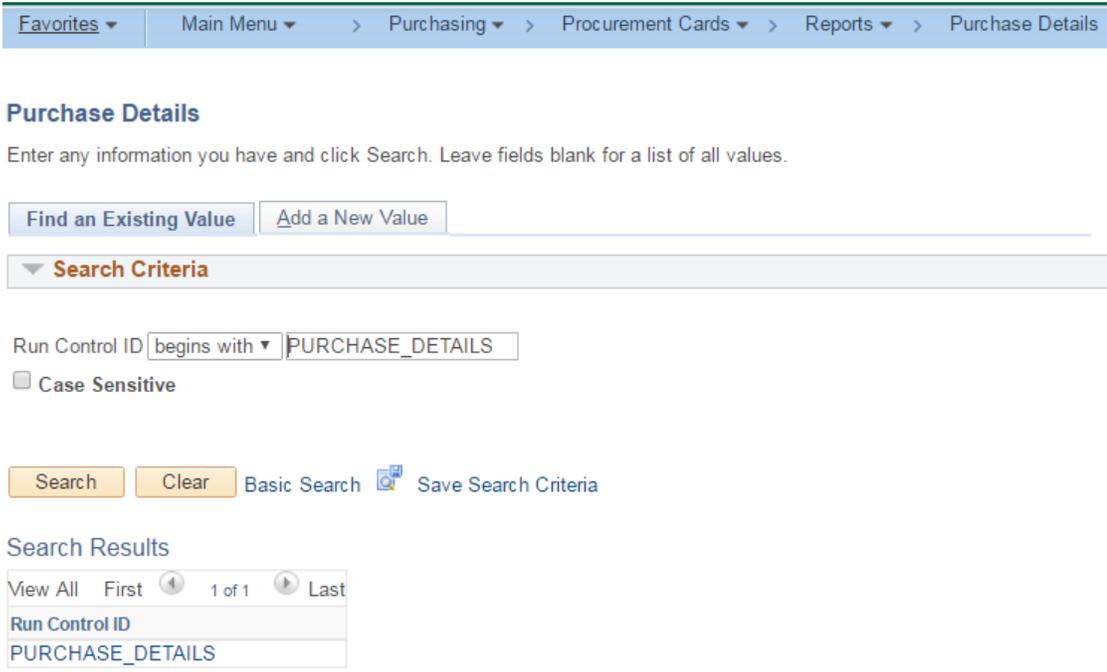
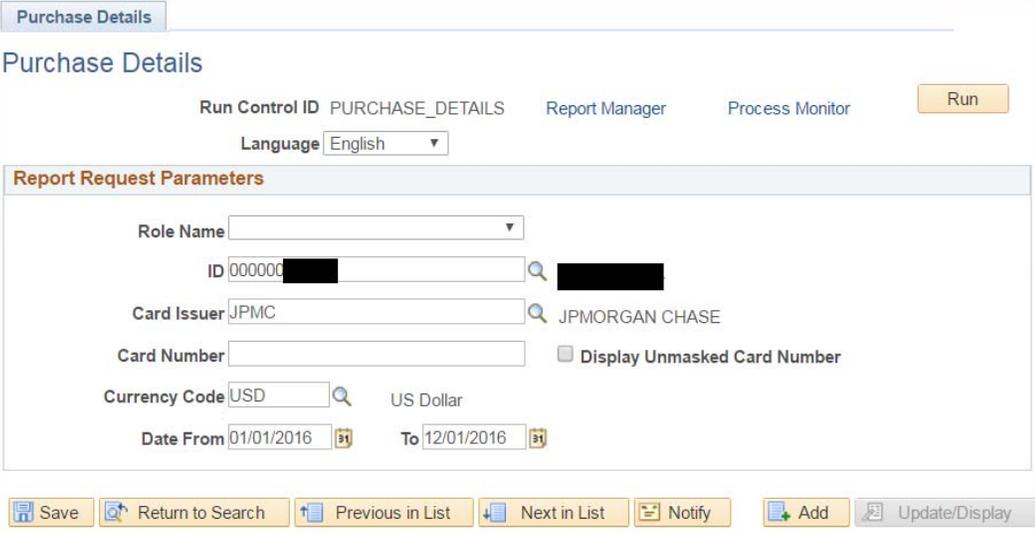
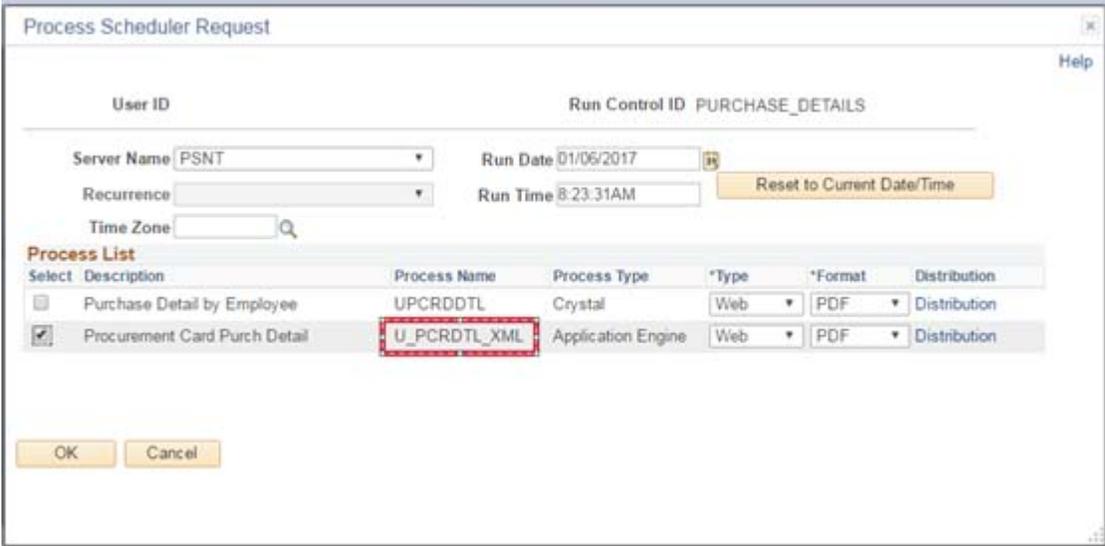
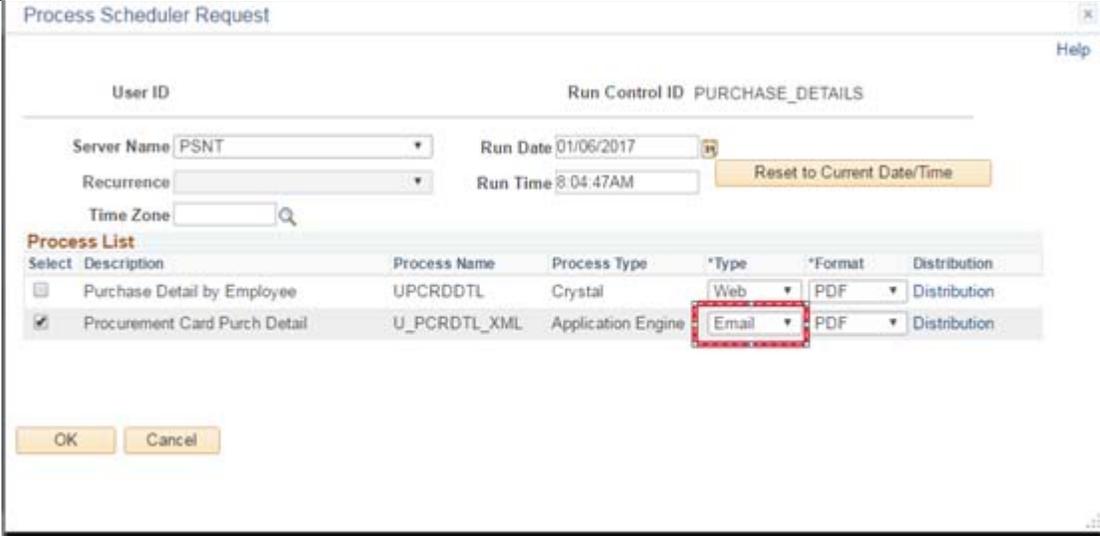
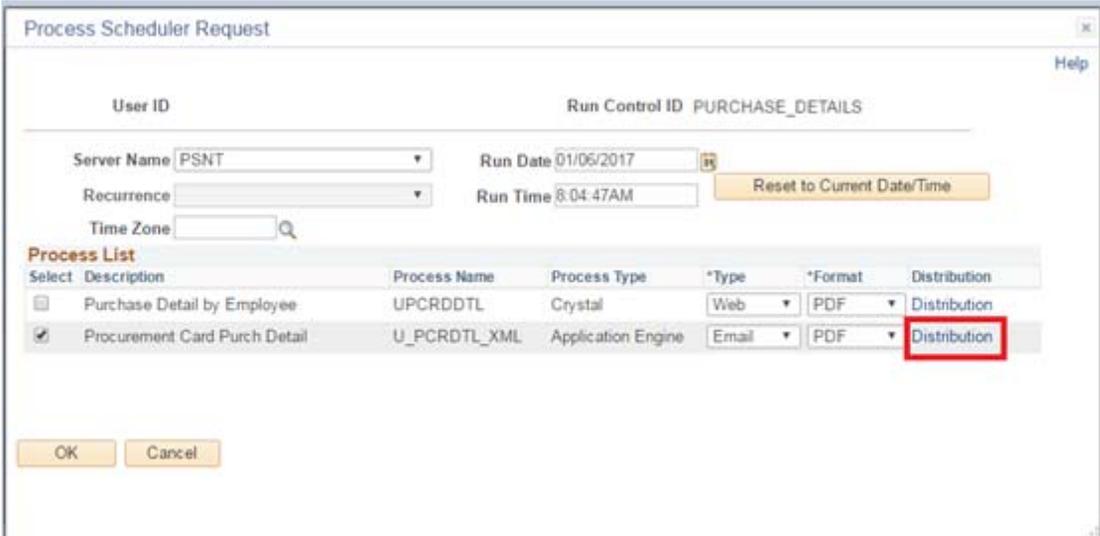
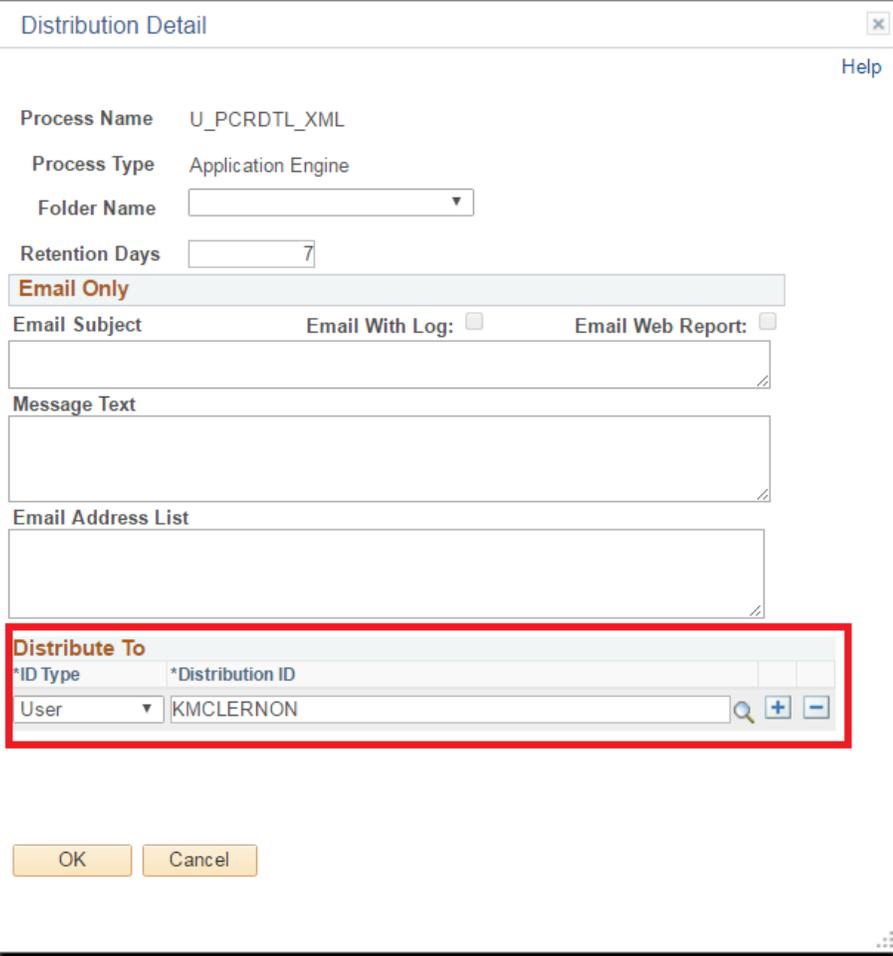


Purpose:	Use the Procurement Card Purchase Detail by Employee report to review Procurement Card (PCard) transaction activity for an employee and date range.
Definition:	N/A
Navigation:	Purchasing → Procurement Cards → Reports → Purchase Details
Notes:	On 01/24/2017 a Crystal to BI conversion occurred for the Procurement Card Purchase Detail by Employee report. The input parameters have not changed, though what happens after the end user clicks on the “Run” icon has. End users should be aware that there are slight differences regarding the report. This is an USF created report. Changes are outlined below.

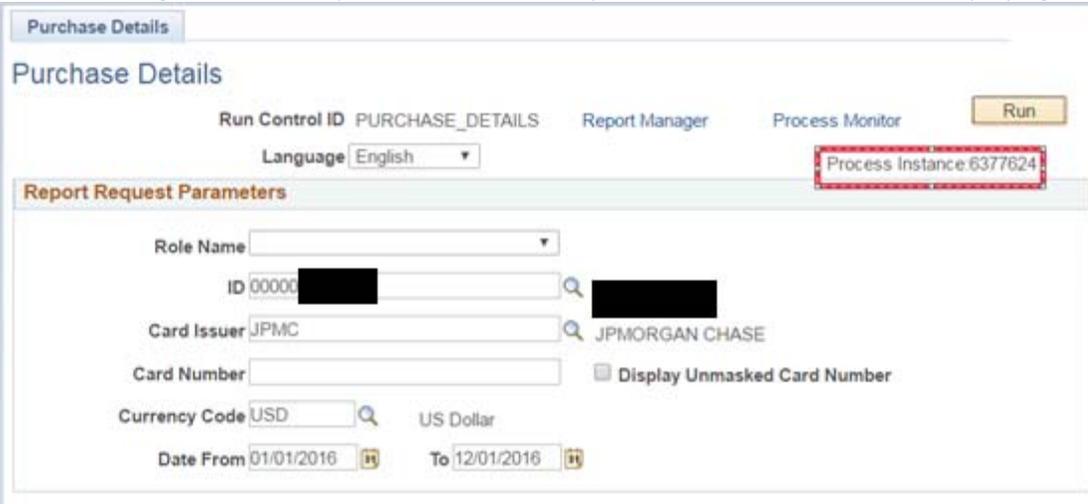
Steps	Description
1	<p>Go to Purchasing → Procurement Cards → Reports → Purchase Details. Find an existing Run Control ID value or add a new one.</p> 
2	Define the input parameters, including the employee ID, card issuer, currency code, and from/thru dates.

Steps	Description
	
3	<p>Click on the “Run” icon. Then select the option corresponding to the U_PCRDTL_XML process name:</p>  <p>Determine if you want the report emailed or displayed on a webpage.</p>
4	<p>If selecting to have the report emailed, change the Process Type to “Email”.</p>

Steps	Description																					
	 <p>The screenshot shows the 'Process Scheduler Request' dialog box. At the top, it displays 'User ID' and 'Run Control ID PURCHASE_DETAILS'. Below this, there are fields for 'Server Name' (PSNT), 'Run Date' (01/06/2017), 'Recurrence', and 'Run Time' (8:04:47AM). A 'Reset to Current Date/Time' button is also present. The 'Process List' table is as follows:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>*Type</th> <th>*Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Purchase Detail by Employee</td> <td>UPCRDDL</td> <td>Crystal</td> <td>Web</td> <td>PDF</td> <td>Distribution</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Procurement Card Purch Detail</td> <td>U_PCRDTL_XML</td> <td>Application Engine</td> <td>Email</td> <td>PDF</td> <td>Distribution</td> </tr> </tbody> </table> <p>Buttons for 'OK' and 'Cancel' are at the bottom.</p>	Select	Description	Process Name	Process Type	*Type	*Format	Distribution	<input type="checkbox"/>	Purchase Detail by Employee	UPCRDDL	Crystal	Web	PDF	Distribution	<input checked="" type="checkbox"/>	Procurement Card Purch Detail	U_PCRDTL_XML	Application Engine	Email	PDF	Distribution
Select	Description	Process Name	Process Type	*Type	*Format	Distribution																
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<input checked="" type="checkbox"/>	Procurement Card Purch Detail	U_PCRDTL_XML	Application Engine	Email	PDF	Distribution																
5	<p>Click on the Distribution button.</p>  <p>This screenshot is identical to the previous one, but the 'Distribution' button in the 'Process List' table for the selected row is highlighted with a red box.</p>																					
6	<p>Define the user or users who will be receiving the report via email.</p>																					

Steps	Description
	 <p>Distribution Detail</p> <p>Process Name U_PCRDTL_XML</p> <p>Process Type Application Engine</p> <p>Folder Name</p> <p>Retention Days 7</p> <p>Email Only</p> <p>Email Subject Email With Log: <input type="checkbox"/> Email Web Report: <input type="checkbox"/></p> <p>Message Text</p> <p>Email Address List</p> <p>Distribute To</p> <p>*ID Type *Distribution ID</p> <p>User KMCLERNON</p> <p>OK Cancel</p>
	<p>Select OK.</p>

7 You'll be brought back to the previous window and you'll have a Process Instance displaying:



Purchase Details

Run Control ID PURCHASE_DETAILS Report Manager Process Monitor Run

Language English Process Instance: 6377624

Report Request Parameters

Role Name

ID 00000

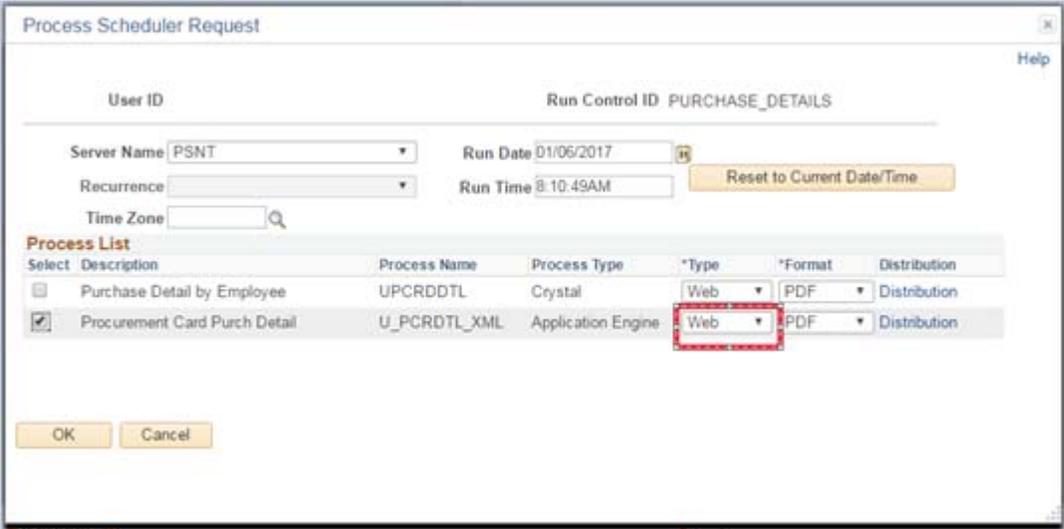
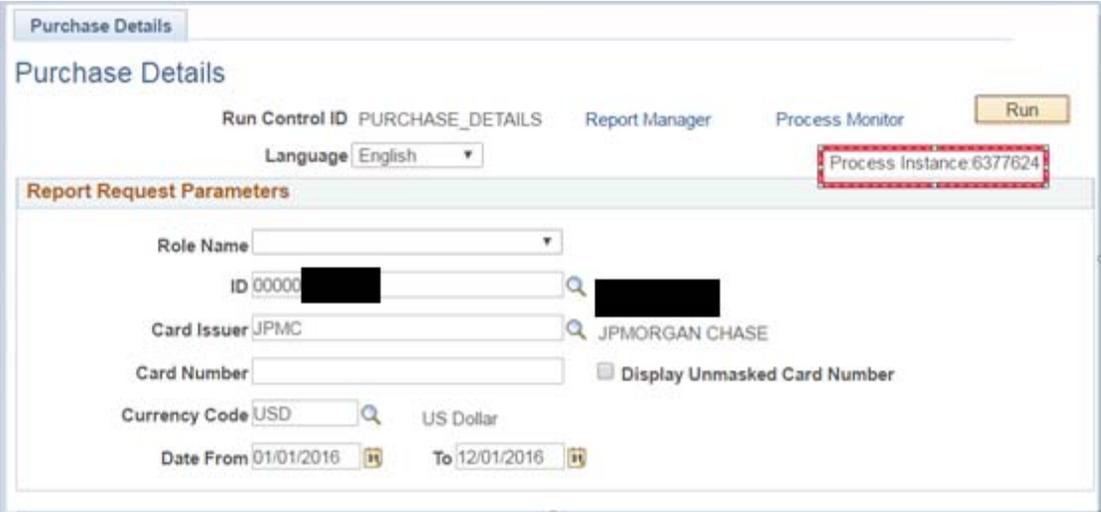
Card Issuer JPMC JPMORGAN CHASE

Card Number Display Unmasked Card Number

Currency Code USD US Dollar

Date From 01/01/2016 To 12/01/2016

Once the job is completed, an email will arrive containing the report as an attachment.

Steps	Description
	
8	<p>If you choose to have the report display on a webpage, highlight the U_PCRDTL_XML process name and select the Web option.</p>  <p>Then click OK.</p>
9	<p>You'll be brought back to the previous window and you'll have a Process Instance displaying:</p> 
10	<p>Click on Report Manager and navigate to the Administration tab. If necessary, click on the Refresh button to have the report links populate the screen. Once it does, you'll see two recently created links as opposed to one. Please note that this is different than how this report</p>

Steps	Description																																																																																																																																		
	<p>acted beforehand, and this is necessary due to software constraints from the new report. Click on the link that ends in .PDF:</p> <p>Favorites ▾ Main Menu ▾ > Purchasing ▾ > Procurement Cards ▾ > Reports ▾ > Purchase Details > Report Manager</p> <p>List Explorer Administration Archives</p> <p>View Reports For</p> <p>User ID <input type="text"/> Type <input type="text"/> Last <input type="text"/> 1 Days <input type="text"/> Refresh</p> <p>Status <input type="text"/> Folder <input type="text"/> Instance <input type="text"/> to <input type="text"/></p> <p>Report List Personalize Find View All First 1-11 of 11 Last</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Report ID</th> <th>Prcs Instance</th> <th>Description</th> <th>Request Date/Time</th> <th>Format</th> <th>Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>4710095</td> <td>6397553</td> <td>U_PCRDTL_XML - U_PCRDTL_XML.pdf</td> <td>01/13/2017 2:45:08PM</td> <td>Acrobat (*.pdf)</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>4710092</td> <td>6397553</td> <td>Procurement Card Purch Detail</td> <td>01/13/2017 2:44:48PM</td> <td>Acrobat (*.pdf)</td> <td>Posted</td> <td>Details</td> </tr> </tbody> </table>	Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details	<input type="checkbox"/>	4710095	6397553	U_PCRDTL_XML - U_PCRDTL_XML.pdf	01/13/2017 2:45:08PM	Acrobat (*.pdf)	Posted	Details	<input type="checkbox"/>	4710092	6397553	Procurement Card Purch Detail	01/13/2017 2:44:48PM	Acrobat (*.pdf)	Posted	Details																																																																																																										
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11	<p>The report will open up, and this will be a BI report instead of a Crystal report. The header is slightly different than beforehand, including the USF logo. Also, the Description and/or Approved By fields can make transactions use two lines if the fields are very long. Due to software constraints, the transaction's status displays on every line. Other than that, the report output has not changed.</p> <p>USF UNIVERSITY OF SOUTH FLORIDA</p> <p>PROCUREMENT CARD PURCHASE DETAIL BY EMPLOYEE</p> <p>Run Date: 1/12/2017 Run Time: 14:54:58 PM</p> <p>From Date: 01/01/2016 To Date: 12/31/2016</p> <table border="1"> <thead> <tr> <th>Trans Dt</th> <th>Load Dt</th> <th>Status</th> <th>Description</th> <th>Approved By</th> <th>Approval Dt</th> <th>Account</th> <th>DeptId</th> <th>Operating Unit</th> <th>Product</th> <th>Fund</th> <th>Initiative</th> <th>Business Unit PC</th> <th>Project ID</th> <th>Activity ID</th> <th>Merchandise Amt</th> </tr> </thead> <tbody> <tr> <td colspan="16">ABEBOOKS.COM Account: *****0035</td> </tr> <tr> <td>8/16/2016</td> <td>8/18/2016</td> <td>Closed</td> <td>POD 024 bhakti movement and literature</td> <td>STRICKLA</td> <td>8/25/2016</td> <td>63225</td> <td>400400</td> <td>TPA</td> <td>000000</td> <td>04601</td> <td>0000000</td> <td></td> <td></td> <td></td> <td>\$53.13</td> </tr> <tr> <td colspan="15"></td> <td>Merchant Total:</td> <td>\$53.13</td> </tr> <tr> <td colspan="16">AMAZON *MKTPICE EU-UK Account: *****0035</td> </tr> <tr> <td>8/25/2016</td> <td>8/30/2016</td> <td>Closed</td> <td>bk 039 dizionario illustrato dell legatura</td> <td>STRICKLA</td> <td>9/8/2016</td> <td>63225</td> <td>400400</td> <td>TPA</td> <td>LIB300</td> <td>12000</td> <td>0000000</td> <td></td> <td></td> <td></td> <td>\$135.42</td> </tr> <tr> <td>8/25/2016</td> <td>8/30/2016</td> <td>Closed</td> <td>bk 039 dizionario illustrato dell legatura</td> <td>STRICKLA</td> <td>9/8/2016</td> <td>52320</td> <td>400400</td> <td>TPA</td> <td>000000</td> <td>12000</td> <td>0000000</td> <td></td> <td></td> <td></td> <td>\$11.81</td> </tr> <tr> <td colspan="15"></td> <td>Merchant Total:</td> <td>\$147.63</td> </tr> </tbody> </table>	Trans Dt	Load Dt	Status	Description	Approved By	Approval Dt	Account	DeptId	Operating Unit	Product	Fund	Initiative	Business Unit PC	Project ID	Activity ID	Merchandise Amt	ABEBOOKS.COM Account: *****0035																8/16/2016	8/18/2016	Closed	POD 024 bhakti movement and literature	STRICKLA	8/25/2016	63225	400400	TPA	000000	04601	0000000				\$53.13																Merchant Total:	\$53.13	AMAZON *MKTPICE EU-UK Account: *****0035																8/25/2016	8/30/2016	Closed	bk 039 dizionario illustrato dell legatura	STRICKLA	9/8/2016	63225	400400	TPA	LIB300	12000	0000000				\$135.42	8/25/2016	8/30/2016	Closed	bk 039 dizionario illustrato dell legatura	STRICKLA	9/8/2016	52320	400400	TPA	000000	12000	0000000				\$11.81																Merchant Total:	\$147.63
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