

Corporate Cards - Search for a Draft Document

Use this guide to Pull Transactions out of Draft Status (PCard and Travel Card) in Workday
<http://workday.miami.edu>

Search for Draft Transaction (PCard)

1. Log in to Workday
2. In the Search bar type in the PC number and click on the magnifying glass icon.

TIP: The PC number will be listed in the automated alert
TIP: If there is no return, click **More Categories**, and then **Procurement**
3. The Verification Report should appear on the screen, click on the report to open.
4. Click the Related Actions button next to the PC number and under **Actions**, select one of the options:
 - a. **Edit**- Review and add needed information before Submitting
 - b. **Cancel**- the transaction will return to new status queue

Search for Draft Transaction (Travel Card)

1. Log in to Workday
2. In the Search bar type in the ER number and click on the magnifying glass icon.

TIP: The ER number will be listed in the automated alert.
TIP: If there is no return, click **More Categories**, and then **Expenses**
3. The *Expense Report* should appear on the screen, click on the report to open
4. Click the Related Actions button next to the ER number and under **Actions**, select one of the options:
 - a. **Edit**- review and add needed information before Submitting
 - b. **Cancel**- the transaction will return to new status queue

For assistance, contact Corporate Card Services:

PCard Program - pcard.ap@miami.edu

Travel Card Program- travelcard.ap@miami.edu