

**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:

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

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

Select the USC My Wallet Transactions pagelet

## 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)

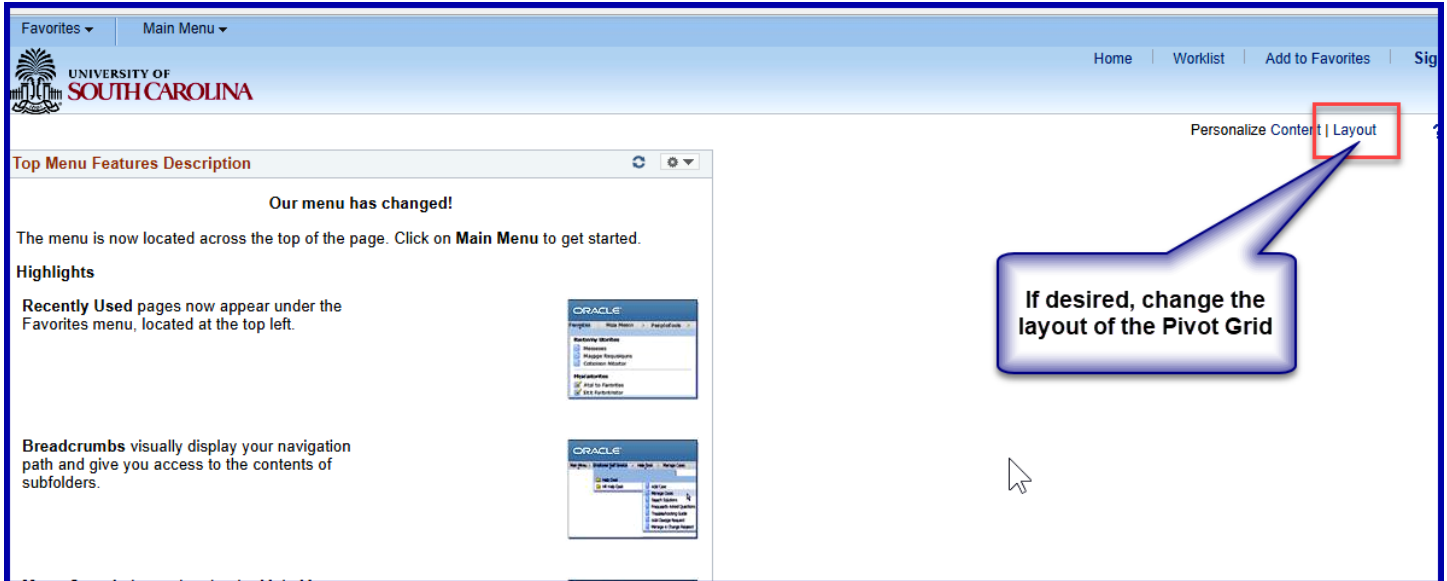
Transaction St...: (All)

	Data Source (Count)
Cardholder	181

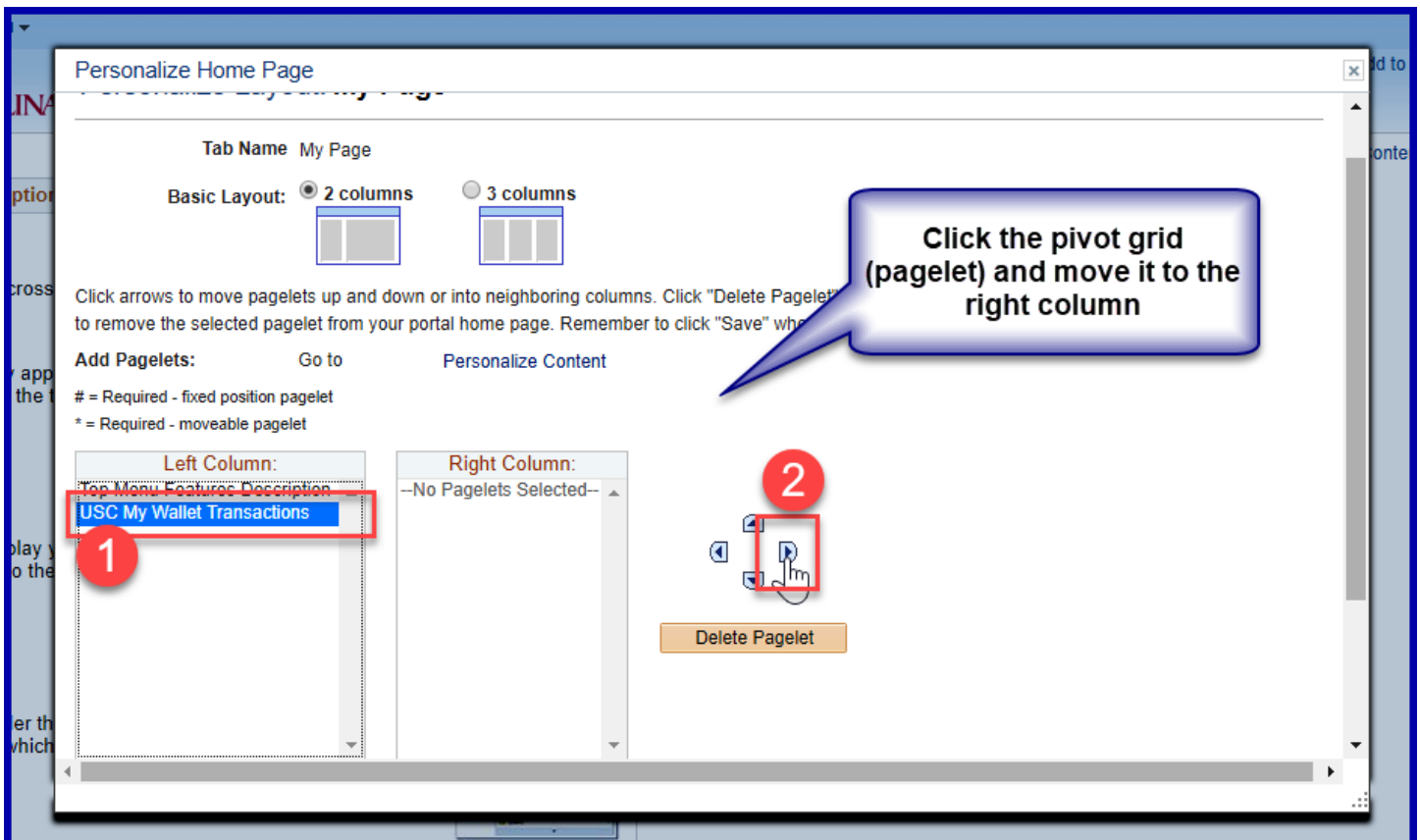
The pivot grid is displayed on the left side of the page



**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

Save      Cancel

Notify

Delete Pagelet

Save the home page

## Step 7: The Pivot Grid layout change is displayed

UNIVERSITY OF SOUTH CAROLINA

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

UNIVERSITY OF SOUTH CAROLINA
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**

**Pivot Grid** Collapse All

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) ▼

(Select All)

assigned

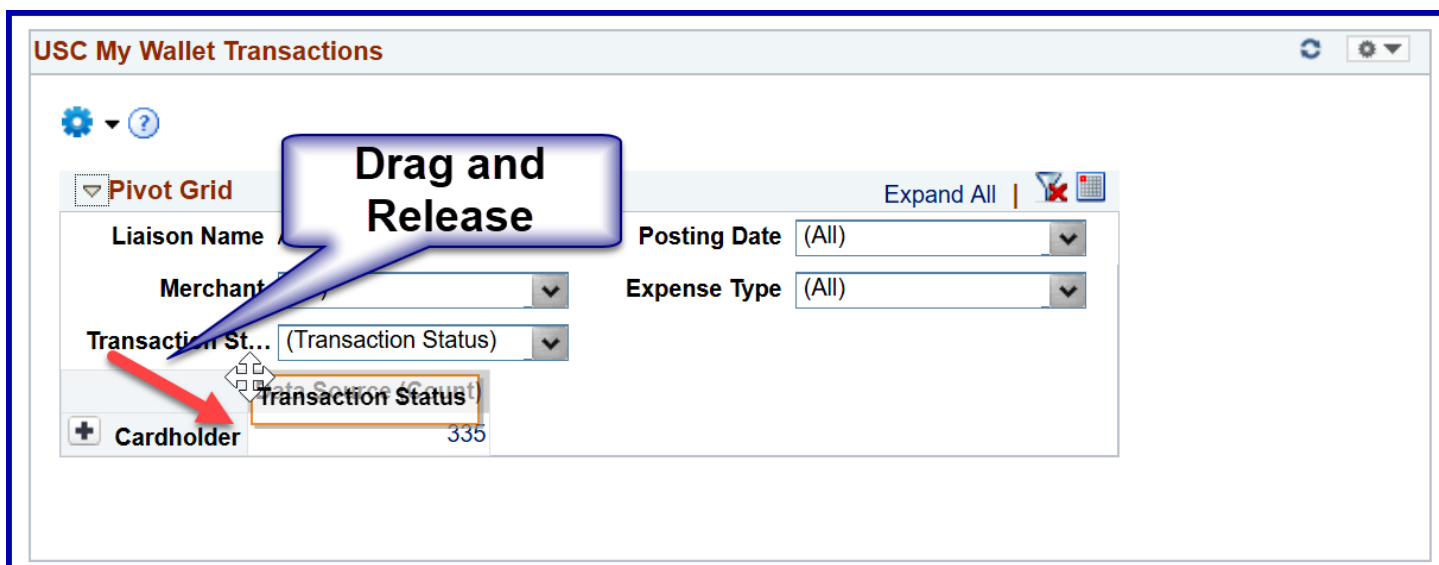
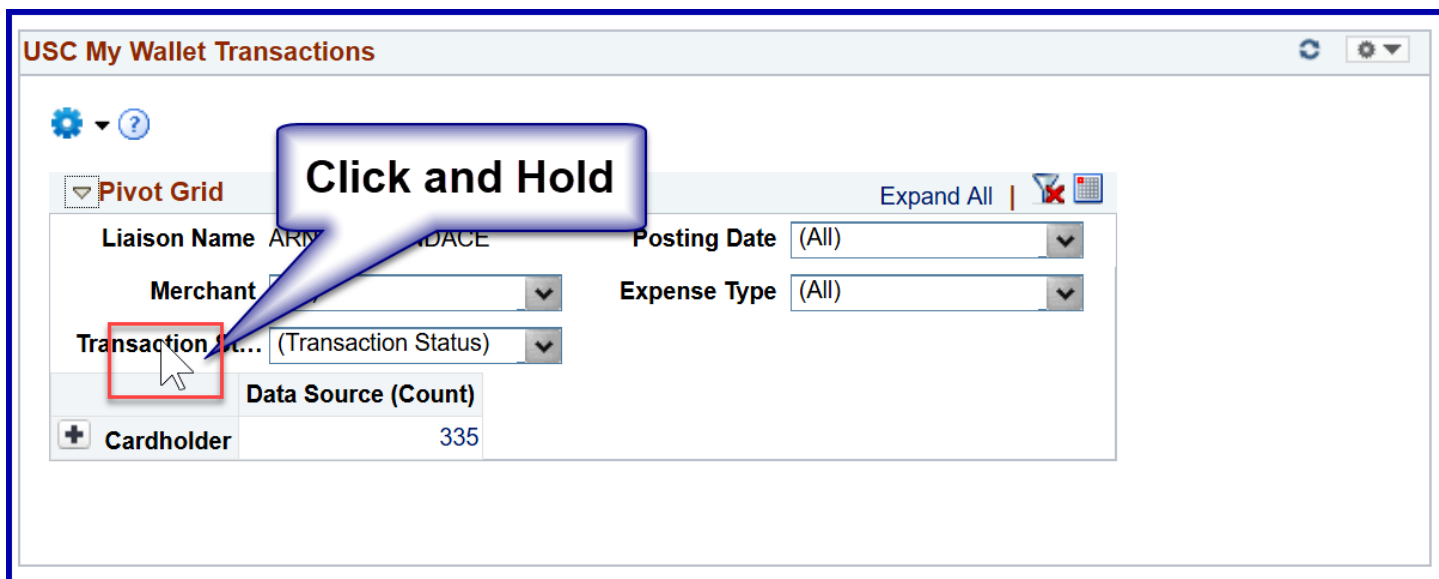
unassigned

OK Cancel

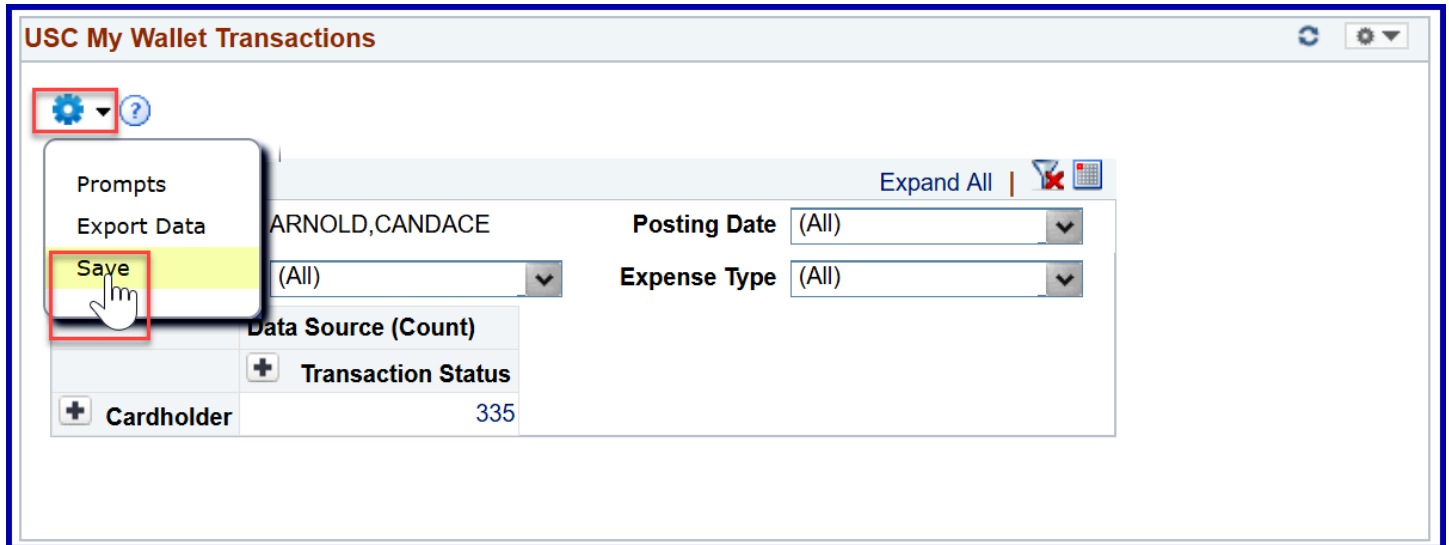
**Select the transaction status and uncheck "assigned" to see unassigned transactions only**

Cardholder	Count
ARNOLD,CANDACE	181
AUSTIN,RUSHTON	12
BAILEY,LARRY	2
BEARD,RODNEY	3
BOSWELL,PENNY	27
COGGIN,KRISTINA	12
CONLEY,MORGAN	7
COX,CORNICE	1
DERRICK,BENJAMIN	1

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 interface. The 'Data Source (Count)' table is partially expanded, showing the 'Transaction Status' column with a plus sign icon. A red box highlights the plus sign, and a hand cursor is positioned over it, indicating the next step is to click it to expand the column.

Data Source (Count)	
Transaction Status	
Cardholder	335

The screenshot shows the 'USC My Wallet Transactions' Pivot Grid interface after the 'Transaction Status' column has been expanded. The expanded table shows the following data:

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	
<b>Cardholder</b>	335	162	
<b>ARNOLD,CANDACE</b>	39	1	38
<b>AUSTIN,RUSHTON</b>	19	0	19
<b>BAILEY,LARRY</b>	4	0	4
<b>BEARD,RODNEY</b>	5	0	5
<b>BOSWELL,PENNY</b>	59	54	5
<b>COGGIN,KRISTIN</b>	49	31	18

**Click on a count to drill down**

**Step 8: The pivot grid drilldown is displayed.**

[Favorites](#) | [Main Menu](#)

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

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	<a href="#">Actions</a>	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-17	2018-07-18	1437.500	B&H PHOTO MOTO		OTHER SUPPLIES	2444500819830046581531
U35501472	<a href="#">Actions</a>	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-16	2018-07-17	441.000	LEVY MARKETING & AWARD		CONTR SERVICES	2468720819701708184980
U35501472	<a href="#">Actions</a>	1089881	BAILEY,LARRY	ARNOLD,CANDACE	2018-07-14	2018-07-16	1086.250	ATAGO U.S.A INC.		OTHER SUPPLIES	2469216819510092508054
U35501472	<a href="#">Actions</a>	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

Pivot Grid Viewer × My Wallet

Secure | https://fms-uat.ps.sc.edu/psp/FUAT\_2/EMPLOYEE/ERP/c/ADMINISTER\_EXPENSE\_FUNCTIONS

Apps CCM Yahoo USC PCard Intranet Works PeopleBooks FCFG FDBA

Favorites Main Menu Employee Self-Service Travel and Expenses My Wallet

Home Worklist MultiC

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My Wallet

**Review My Wallet Receipts**

LARRY BAILEY

**Search Criteria** ?

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

\*Receipt Data Source All Data Sources

\*Transaction Status Unassigned

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.

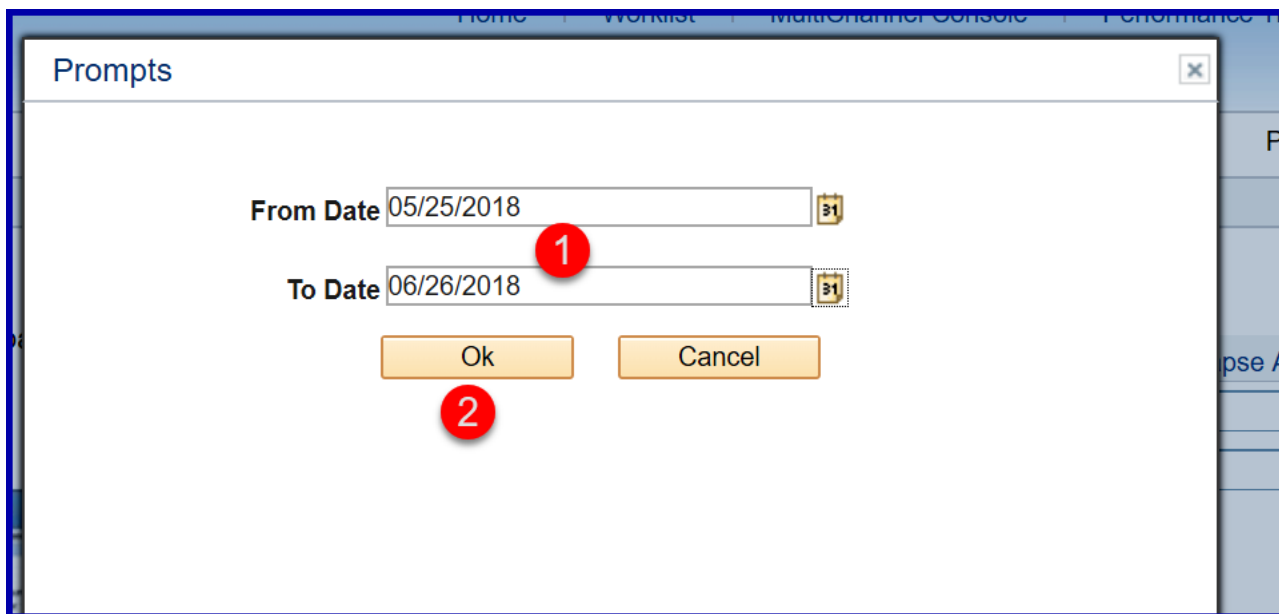
The screenshot shows the 'USC My Wallet Transactions' interface. At the top, there are filter fields: 'Liaison Name' (ARNOLD,CANDACE), 'Posting Date' ((All)), 'Merchant' ((All)), and 'Expense Type' ((All)). A red box highlights the 'Expense Type' dropdown menu, which is open and shows a list of categories with checkboxes: (Select All), ADVERTISING, AIR TRAVEL, AUTO RENTAL, CELLULAR/WIRELE, CONTR SERVICES, and DATA PROCESSING. Below the filters is a table with columns for 'Data Source (Count)', 'Transaction Status', 'Assigned', and 'Unassigned'. The table lists cardholders and their transaction counts.

Cardholder	Data Source (Count)		
	Assigned	Unassigned	Total
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

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

The screenshot shows the 'USC My Wallet Transactions' interface with the gear icon menu open. A red box highlights the gear icon, and another red box highlights the 'Prompts' option in the menu. The menu also includes 'Export Data' and 'Save'. The background shows the same filter fields and table as in Step 12.

**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.