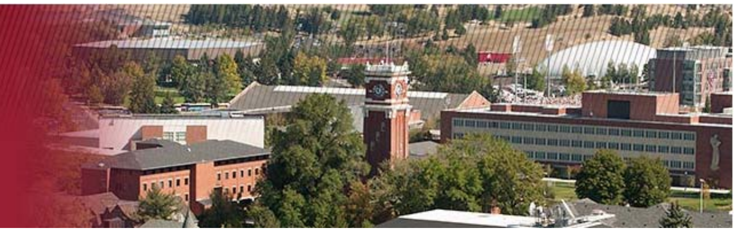
WASHINGTON STATE UNIVERSITY

Central Travel Account



Viewing Transactions and Creating Queries

Viewing Transactions

There are three ways to find and review transactions.

Locate transactions from the transaction list: select Transactions > Manage. The Transaction List screen displays transactions for the last 30 days.

You can also find transactions using an existing (saved) query: select Transactions > Manage, and select an existing query from the drop-down list next to the Set as Default Query link.

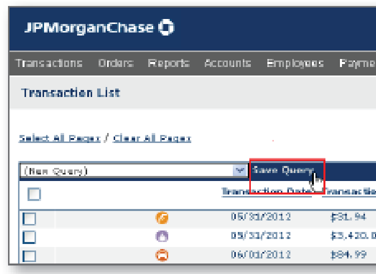
A more specific way is to locate transactions based on the criteria you define by creating a new query. Finding a transaction this way locates just those transactions you need.

Follow the steps below to create a new query to view transactions.

1. Perform a new query to locate the specific transactions. Select **Transactions > Query.**
2. Enter your date range:
   - **Field:** You can select **Post Date** or **Transaction Date** from the drop-down list.
   - **Operation:** Select the criteria to measure the field value. The operations that display vary based on the selected Field. For example, **Is Relative** is a relative date range or a period of time that is relative to the current date, e.g., Last Week is a relative date range.
   - **Value:** Enter or select the value in the appropriate boxes. Dates should be in the MM/DD/YYYY format.
3. Enter your criteria:
   - **Field:** Available fields are listed in alphabetical order. Select a field from the drop-down.
   - **Operation:** Select the criteria to measure the field value. The operations that display vary based on the selected Field.
   - **Value:** Enter or select the value in the appropriate boxes. Dates should be in the MM/DD/YYYY format.

> Note: To improve query results, enter the minimum amount of characters for the criteria value to identify text fields. For example: enter "Banana" instead of "Bananas," "Banana's," "Bananas, Inc." or "Banana Store #2342."

4. If additional rows of criteria are needed, click the **Plus** [+] icon. To delete a row of criteria, click the **Trash Can** icon.
5. In the **Order By** section, set the data columns in a specific order:
   a. Click the **Plus** [+] icon.
   b. Select the **Field.**
   c. Select the **Order Sequence.**
6. Click the **Process** button to run the query. Query results display on the **Transaction List** screen.
7. Click the **Save Query** link located next to the default query drop-down list.
8. Enter the name you want for this query in the text field.
9. Click **Save.** The saved query is now available from the **Save Query** drop-down list.
10. Click the transaction you want to view.



11. On the **Transaction Detail** screen, select the appropriate tab to view additional information:
    - **General Information.** Manage transaction details such as approving transactions, and applying accounting codes.
    - **Receipts.** Attach or fax receipts if your organization has Receipt Imaging enabled.
    - **Addendum.** Review details such as a tracking number associated with an order and the anticipated delivery date.
    - **History.** Review additional transaction audit data.

> Note: Additional information on transactions may be available if icons (e.g.,) are displayed on the Transaction List. Click the icon to view the detail.