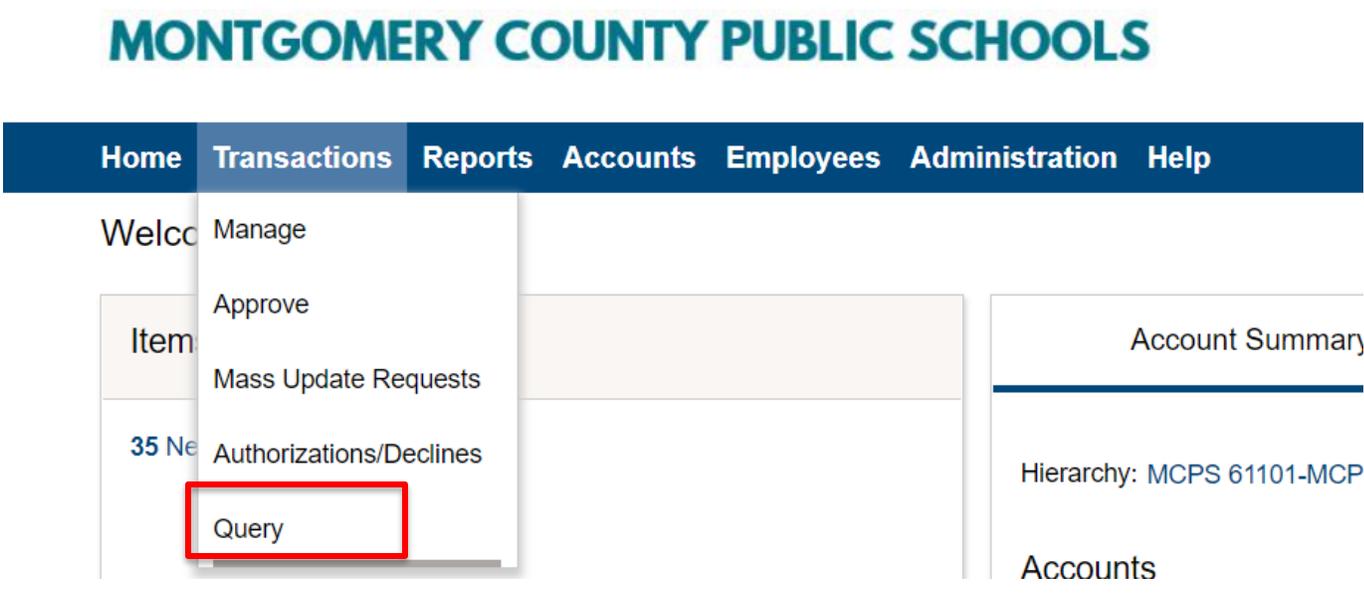


In this topic, you will learn how to review or approve transactions up to 701 days old

Step	Directions
1	<p>Within the dashboard, hover over Transactions and Select Query</p>  <p>The screenshot shows the Montgomery County Public Schools dashboard. At the top, the title 'MONTGOMERY COUNTY PUBLIC SCHOOLS' is displayed in large blue letters. Below the title is a dark blue navigation bar with the following items: Home, Transactions, Reports, Accounts, Employees, Administration, and Help. The 'Transactions' item is highlighted, and a dropdown menu is open, listing the following options: Manage, Approve, Mass Update Requests, Authorizations/Declines, and Query. The 'Query' option is highlighted with a red rectangular box. To the right of the navigation bar, there is a sidebar with the following items: Account Summary, Hierarchy: MCPS 61101-MCP, and Accounts. The main content area of the dashboard is mostly blank, with some faint text visible on the left side, including 'Welcc', 'Item', and '35 Ne'.</p>

2

Change the parameters of the search:

Date Range; **Post date > Is Relative > Last Days > (up to 701 days in the past)**

Under Criteria: Select **“Accounting Code Values” Operation: “Begins With” > Chart Name: “Cloud Operating Budget” > Segment Name “Organization”** and enter **YOUR Organization Number** in the **Segment Value Field**. **The number entered is an example only.*

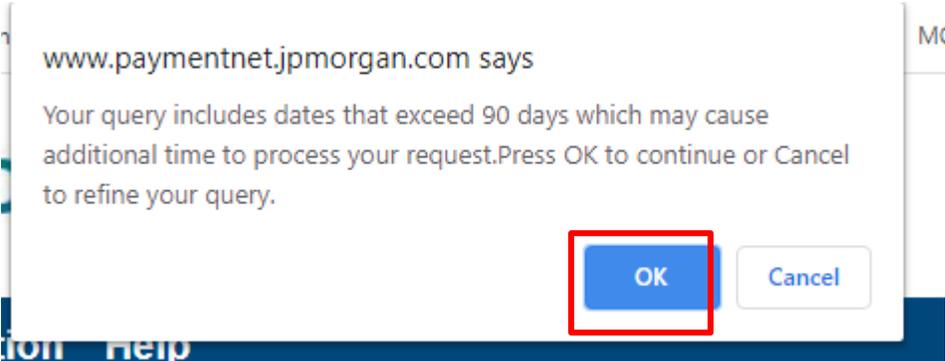
***Do not add any additional parameters**

Date Range						
ID	Operator	Field	Operation	Value	Action	
1		Post Date	Is Relative	Last Days	701	Add

Criteria						
ID	Operator	Field	Operation	Value	Action	
1		Accounting Code Values	Begins With	Chart Name	Cloud Operating Budget	Delete Add
				Segment Name	Organization	
				Segment Value	04701	

3

Click **Process**

	<p>Hierarchy</p> <hr/> <table border="1"><thead><tr><th>ID</th><th>Hierarchy Name</th><th>Include Children</th><th>Action</th></tr></thead><tbody><tr><td colspan="3">Nothing Selected.</td><td><input type="button" value="Add"/></td></tr></tbody></table> <p>Order By</p> <hr/> <table border="1"><thead><tr><th>ID</th><th>Field</th><th>Order Sequence</th><th>Action</th></tr></thead><tbody><tr><td colspan="3">Nothing Selected.</td><td><input type="button" value="Add"/></td></tr></tbody></table> <p><input type="button" value="Process"/> <input type="button" value="Reset"/></p>	ID	Hierarchy Name	Include Children	Action	Nothing Selected.			<input type="button" value="Add"/>	ID	Field	Order Sequence	Action	Nothing Selected.			<input type="button" value="Add"/>
ID	Hierarchy Name	Include Children	Action														
Nothing Selected.			<input type="button" value="Add"/>														
ID	Field	Order Sequence	Action														
Nothing Selected.			<input type="button" value="Add"/>														
4	<p>A pop up appears, click OK</p> 																
5	<p>Select each transaction to review or you can click the top box (see red square below) to select all transactions. You can also sort by cardholder name if needed by clicking on the Cardholder Last Name field.</p>																

Select All Deselect All

Filter B (New Query) Save Query

<input checked="" type="checkbox"/>	Exported	Cardholder Last Name	Cardholder First Name	Account Number	Transaction Amount	Transaction Date	Post Date	Approval Status
<input checked="" type="checkbox"/>	\$	✓			\$491.53	10/21/2020	10/22/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			\$129.48	10/08/2020	10/12/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			(\$2.28)	09/30/2020	09/30/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			(\$2.28)	09/30/2020	09/30/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			(\$2.28)	09/30/2020	09/30/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			(\$2.28)	09/30/2020	09/30/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			(\$4.20)	09/30/2020	09/30/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			(\$5.40)	09/30/2020	09/30/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			(\$100.69)	09/25/2020	09/25/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			\$9.99	09/22/2020	09/24/2020	Reviewed
<input checked="" type="checkbox"/>	\$	✓			\$28.89	09/15/2020	09/16/2020	Reviewed

Names and account numbers covered for security