

Using MyFD Queries with PCA

Locate the PCA Type to Query – Are you using UltraLite or Lite?

- 1) On the Transaction Summary, find a transaction and click on the Description to go to the Transaction Detail page.

View Budget # 039331 May << June 2012 >> Jul

Reporting Period: June 2012

+ 03-9331 NEW STDNT ENRLMNT CLUE Profile Budget

Account Code	Description	Transaction Date
01	SALARIES AND WAGES	
01-60	CLASS (HEPB) STAFF SAL	
01-60-01	SWAN, KATHERINE	06/25/2012

- 2) Look at the Core Fields section at the top for the PCA codes. If there are values here, then you are using PCA Lite and your normal query will pull the PCA codes. If there are no PCA values in this area, you are using PCA UltraLite codes, which show up in MyFD as “PCA Original.”

Core Fields	
Item	Value
Account Code	016001
Budget Number	03-9331
PCA Option Code	
PCA Project Code	
PCA Task Code	
Transaction Amount	665.00
Transaction Date 1	6/25/2012
Transaction Description	SWAN, KATHERINE

- 3) Scroll down to find the PCA Original Codes in the General Fields section. PCA UltraLite codes show up here.

PCA Original Option Code	012
PCA Original Project Code	FYP080
PCA Original Task Code	330

Select the Correct PCA Code Fields to Query

In Section 2 of any Query Template, carefully review the section called “Select report fields and their order.” The type of PCA codes your organization is using will matter which fields are used. The box on the right showing the Selected Report Fields automatically contains the fields for PCA Lite.

However, if you are using PCA UltraLite, you will need to remove these fields and add in the PCA Original fields.

- 1) When creating a query (or revising a query that had the wrong PCA fields), first you need to take out the PCA code fields that do not apply to your PCA type. Highlight the PCA codes in the box on the right, then click the left arrow to move them out of your selected report fields.

2. Select report fields and their order (text to clarify that the reconciliation data can change)

All report fields
 [Use my report fields](#)

Report fields are the columns of data you see in your query results.
For a more refined query, see [Frequently Used Report Fields](#)

Available report fields: See [Glossary](#)

Selected report fields:

- Account Code
- Transaction Description
- Transaction Date 1
- Transaction Reference 1
- Transaction Reference 2
- Transaction Reference 3
- Transaction Reference 4
- Transaction Amount
- PCA Project Code
- PCA Task Code
- PCA Option Code

- 2) Change the defaulted “Use my report fields” selection by clicking the radio button for All Report Fields, then scroll down to select the PCA Original codes. Click the right arrow button to move them into your selected report fields.

2. Select report fields and their order (text to clarify tha

All report fields
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Report
For a n

Available report fields: See [Glossary](#)

- PCA Edit Code 5
- PCA Edit Code 6
- PCA Option Code
- PCA Organization Code
- PCA Organization Name
- PCA Original Option Code
- PCA Original Project Code
- PCA Original Task Code
- PCA Overhead Cost Allocation
- PCA Project Code
- PCA Status Flag

- 3) Now the PCA Original codes show up in the right column which will be your column headings in your query results. You can adjust them up or down for which column(s) you would like them to appear in the results.

2. Select report fields and their order (text to clarify that the reconciliation data can change)

All report fields
 [Use my report fields](#)

Report fields are the columns of data you see in your query results. For a more refined query, see [Frequently Used Report Fields](#)

Available report fields: See Glossary	Selected report fields:
PCA Edit Code 5	Account Code
PCA Edit Code 6	Transaction Description
PCA Option Code	Transaction Date 1
PCA Organization Code	Transaction Reference 1
PCA Organization Name	Transaction Reference 2
PCA Overhead Cost Allocation	Transaction Reference 3
PCA Project Code	Transaction Reference 4
PCA Status Flag	Transaction Amount
PCA Task Code	PCA Original Option Code
PCA Transaction Description	PCA Original Project Code
PCA Transaction Indicator	PCA Original Task Code

Buttons: < > Move up Move down

- 4) Run your query!