Concur
Procurement Reporting
Expense Manual

Procurement Card and Travel Services
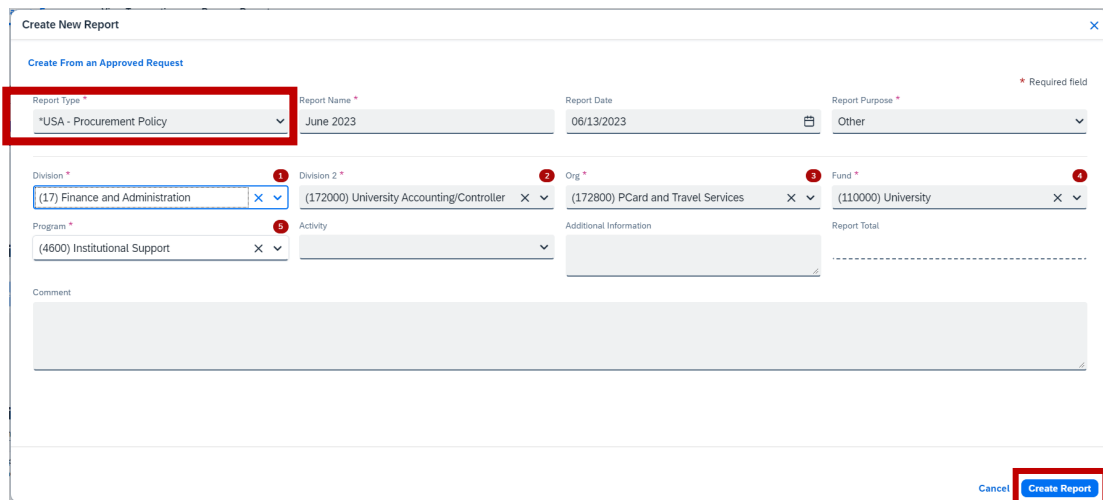
Creating a New Expense Report

Create the report:

1. On the home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Report**.
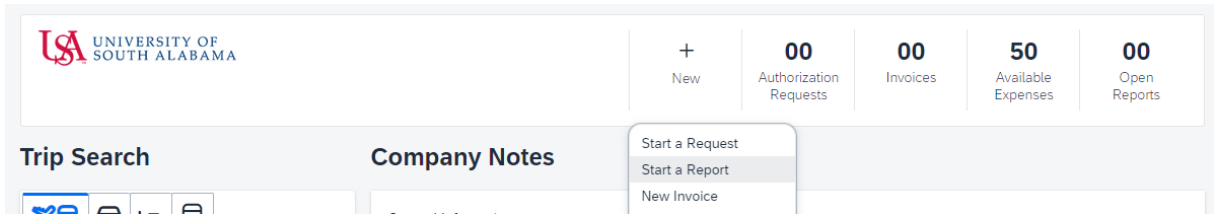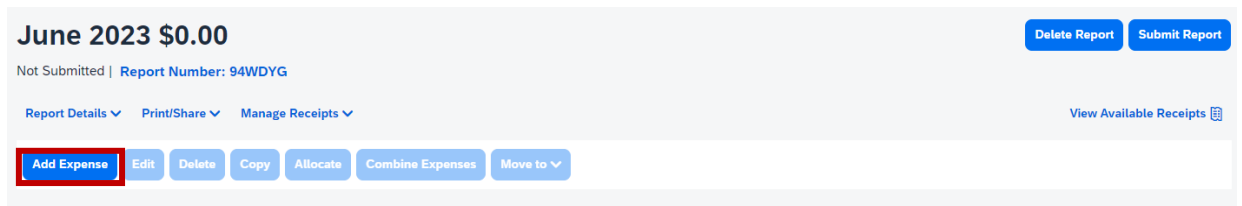

2. Complete all required fields **(marked with red asterisk)** and the optional fields as needed. Then click **Create Report.**

Note: Report Type field must be USA – Procurement Policy

3. Once you have created your report click **Add Expense** to beginning adding your pcard transactions to this report.

4. Your PCard transactions will be listed under the **Available Expenses** tab. Check the box next to the transaction(s) you wish to add to this report or check the top box to select all transactions.

5. Click **Add To Report**.

6. Each expense will have Alerts click each expense one at a time and complete all the required fields and any optional fields as needed.

7. Make sure the Expense Type is correct and all required fields have been completed. Required fields are marked with a red asterisk next to the field name. Some will auto populate for you.

Note: The Alerts at the top of the screen will aid you in completing the requirements for this particular transaction.

8. Click **Add Receipt** and locate the required documentation associated with this transaction and attach. Then click **Save Expense.**

Note: If you need to allocate any expense(s) to another FOAPAL(s) please see the How To Allocate video and/or manual.

9. Once you have added all the pcard transactions you wish to add to this report click **Submit Report**.