

## Step-by-Step Guide

### Procurement Card Expense Report: Step 1 – Creating the Expense Report

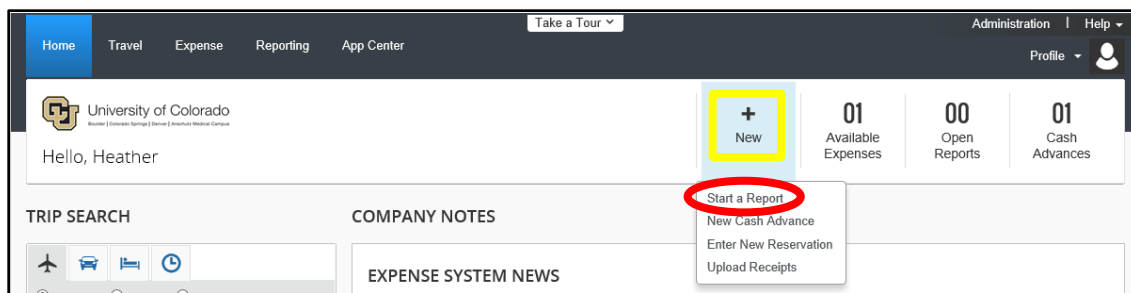
In the Concur Travel & Expense System, create a Procurement Card expense report to reconcile your Procurement Card expenses on a monthly basis. Procurement Card expenses can be added to the expense report – and expense information edited – throughout the month. **You should submit only one Procurement Card expense report per month.**

A Procurement Card expense report is created by completing the Report Header page.

Are you creating this expense report on someone's behalf? If so, you must first act as that person's delegate. Refer to the Step-by-Step Guide [Acting as a Delegate or Travel Arranger](#) for further information.

Begin by accessing Concur via [your campus portal](#). Locate your **CU Resources** section and, under the **Business Applications** area, select the **Concur Travel & Expense System** link.

There are several ways to create a new expense report within Concur. One way is to use the buttons located in the upper right corner of your Concur home page. Hover your mouse over the **New** button and select **Start a Report**.



On the Report Header page, use the **Policy** dropdown and select *Procurement Card*.

The screenshot shows the 'Create a New Expense Report' form, specifically the 'Report Header' section. The form has several fields: 'Policy' (a dropdown menu set to 'Procurement Card'), 'Report Name' (text box with 'Hoyer Proc Card Nov 2014'), 'SpeedType' (text box with '(51087735) 51087735 - Operati'), 'Approver's Employee ID' (text box with 'XXXXXX'), 'Approver's Name' (text box with 'Hicks, Sandra Kay'), 'Comment' (text box), and 'Alternate Contact Employee' (text box). At the bottom right, there are 'Next >>' and 'Cancel' buttons.

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Name your expense report for tracking and reporting purposes.

The Report Header **SpeedType** will default to the SpeedType assigned to your Procurement Card. This is not necessarily where your expenses will be charged since every expense must be allocated before submission.

Your Approving Official's (AO) name and employee ID will also populate the Report Header. This is the person to whom this expense report will route for approval.

Enter comments that apply to the entire expense report in this **Comment** field.  
*Note:* You will have the opportunity later to add comments to a specific expense.

The **Alternate Contact Employee** field identifies who should be contacted if there is a question on this expense report.

Click **Next**.

*You have now created a Procurement Card expense report by completing the Report Header page. You are now ready to go on to **Step 2 – Adding Expenses**. There are a couple of Step-by-Step Guides available on the [Concur Procurement Card Learning Resources web page](#):*

- *Overview of Expense*
- *Adding Procurement Card Expenses*