

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.

From the **Active Work** section of your Concur home page, click the **New Expense Report** tab.

Active Work				
New Expense Report		View Reports		
Expense Reports (1)		Authorization Requests (0)		
Report Name	Status	Payment Status	Report Date	Requested Amount
test	Not Submitted	Not Paid	08/09/2011	USD 50.00

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

The screenshot shows the 'Create a New Expense Report' page in the Concur system. The 'Report Header' section is highlighted. The 'Policy' dropdown is set to 'Procurement Card'. The 'Report Name' field is empty. The 'SpeedType' field is set to '(51019448) 51019448 - Vpbf-Controller'. The 'Approver's Employee ID' field is set to '212115'. The 'Approver's Name' field is set to 'Kuehler, Robert'. The 'Comment' field is empty. The 'Alternate Contact Employee' field is empty.

Step-by-Step Guide

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

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*