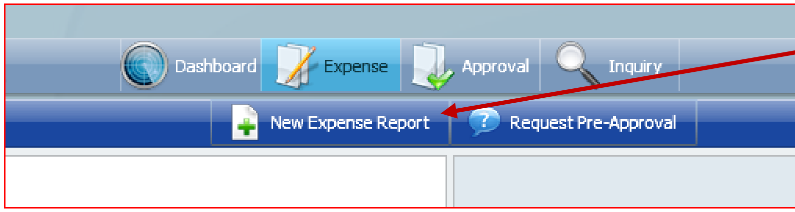
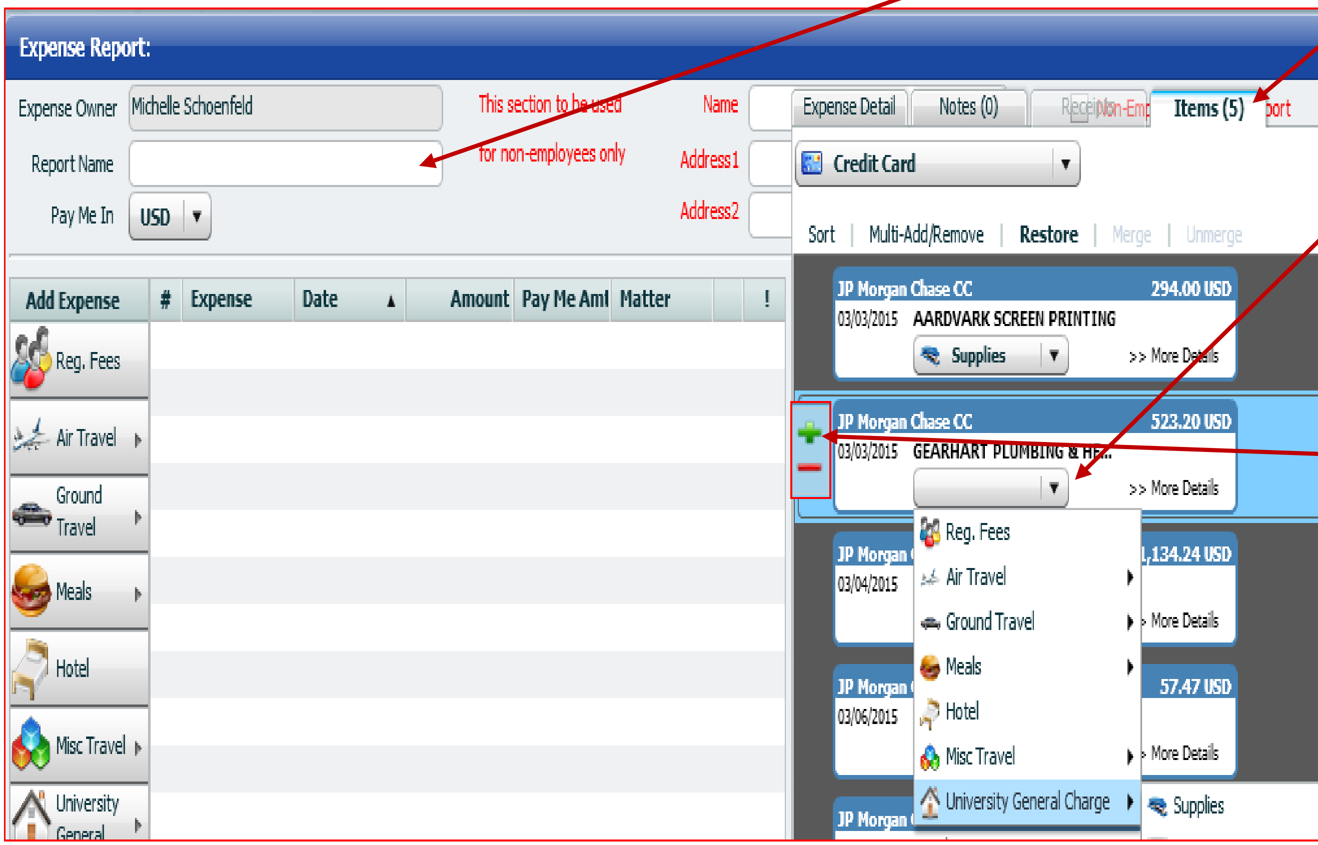
PCard Quick Guide





Select New Expense Report

Optional: enter a Report Name. If left blank, defaults to current date and time.

Click on the Items tab to access pcard transactions

If expense type is not automatically populated, click on the drop down to select a category. For non-travel expenses, select a category within University General Charge.

Hover over the transaction and then click the green plus sign to open it.

Be sure to limit your reports to a maximum of 10 transactions per report.

Contact Purchasing Card Administrator for assistance: 2-8595/tlcoss@bgsu.edu

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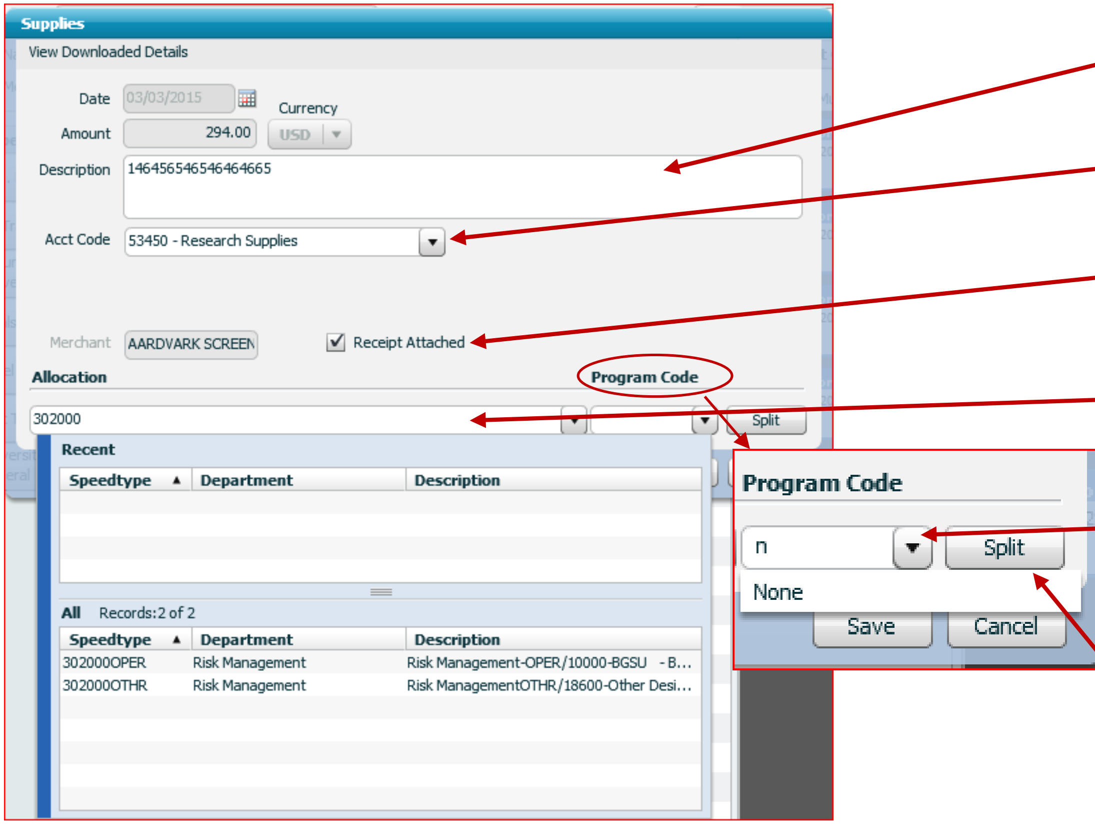

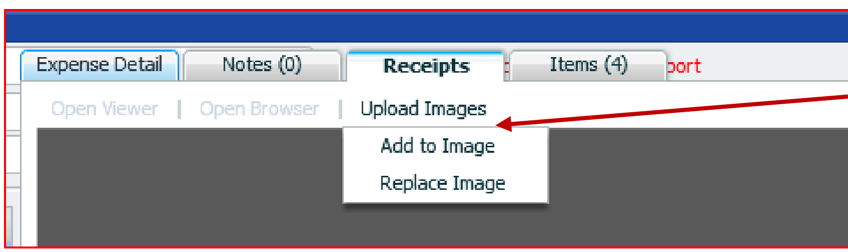

Clear out the prepopulated data in Description and enter a business purpose for the charge.

If this field is available, select a specific Account Code.

Checkmark Receipt Attached, stating that you are going to attach a receipt.

Enter the department/grant number and wait for the options to appear in the box below.

Enter a Program Code or select None if your department does not use them. When typing in the code be sure that you click on it from the list in the drop down.

Optional: Select Split to split the purchase between multiple budgets.

Attach your itemized receipt by clicking the Receipts tab > Upload Images > Add to Image. Receipts must be in PDF format.
NOTE: Selecting Replace Image replaces all the receipts you have already attached.

When you have completed the expense report you can either Save & Close or Submit the report. If you Save & Close, this will allow you to go back to the report to modify it. Submitting the report will move it to the budget admin. for approval.