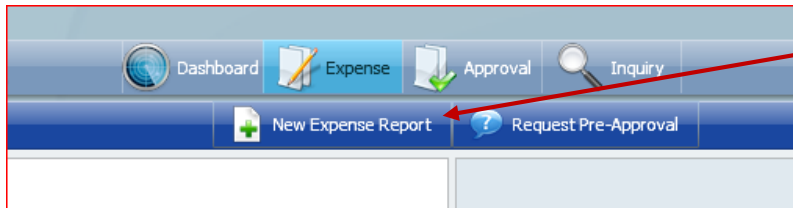


PCard Quick Guide



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

A screenshot of the 'Expense Report' form and transaction list. The form includes fields for 'Expense Owner' (Michelle Schoenfeld), 'Report Name', and 'Pay Me In' (USD). A red arrow points to the 'Report Name' field with the text 'This section to be used for non-employees only'. Below the form is a table with columns: 'Add Expense', '#', 'Expense', 'Date', 'Amount', 'Pay Me Aml', and 'Matter'. The table lists various transactions, including 'JP Morgan Chase CC' for 'AARDVARK SCREEN PRINTING' (294.00 USD) and 'GEARHART PLUMBING & HE...' (523.20 USD). A red box highlights a green plus sign icon on the left of the second transaction, with a red arrow pointing to the text in the adjacent box. The 'Items (5)' tab is also highlighted with a red arrow.

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

PCard Quick Guide

Supplies
View Downloaded Details

Date: 03/03/2015 Currency: USD
Amount: 294.00

Description: 1464565465464665
Acct Code: 53450 - Research Supplies

Merchant: AARDVARK SCREEN Receipt Attached

Allocation
302000 Split

Program Code
n Split
None
Save Cancel

Speedtype	Department	Description
302000OPER	Risk Management	Risk Management-OPER/10000-BGSU - B...
302000OTHR	Risk Management	Risk ManagementOTHR/18600-Other Desl...

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.

Expense Detail Notes (0) **Receipts** Items (4) Report

Open Viewer Open Browser Upload Images

Add to Image
Replace Image

0 / 0

PDF Report Submit Save/Close