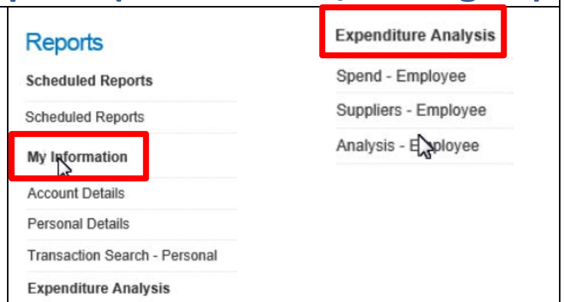
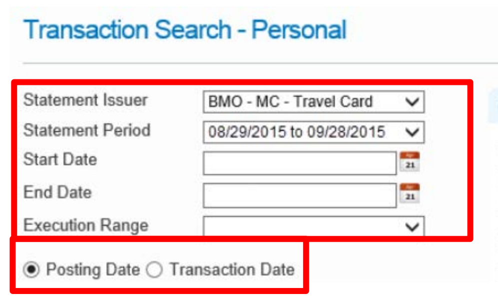
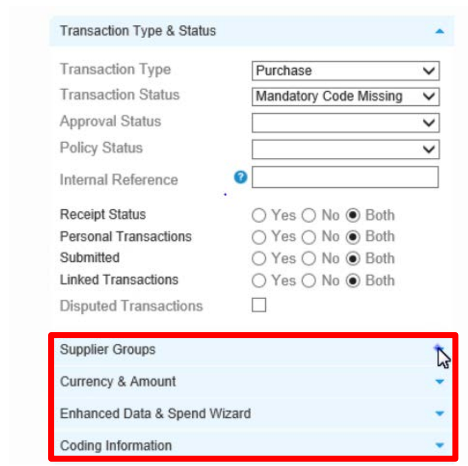
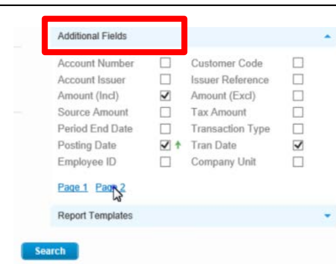
Create Reports (Cardholders/Managers)

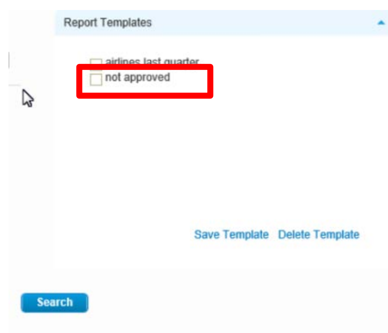
Reports available for managers and cardholders may vary based on the rights granted by the Administrator.	1. To create reports, select **Reports** from the **Main Menu** on the **Home** screen. 2. Cardholders and Managers have a list of reports available under **My Information**. Managers have an additional set of reports available under **Expenditure Analysis**. 3. Click the report to run (e.g. Transaction Search - Personal. While the fields may vary, the process to run a report is the same.	
Fields available on reports will vary depending on the options selected by the company.	4. Identify the transactions to be included in the report (e.g. Card or Cash Account). 5. The most recent statement period for the primary account, is prefilled. A different statement period, custom **Start and End Date**, or **Execution Range** can also be selected. Most searches are completed by the transaction date. Searches can also be completed by transaction date.	
For managers, searches can be narrowed for a particular employee, or a particular Company Unit.	6. On the right side of the screen, select additional criteria to further narrow the search. 7. Additional filters such as **Supplier Groups**, **Currency and Amount**, and **Status** are available. More advanced search criteria, such as **Enhanced Data** and **Coding Information**, are available if these fields are used by the company or required for transactions.	
	8. Select any additional information to include in the search results.	

9. If this is a search that will be run from time to time, create a new template.

10. Click **Save Template** and give the report a meaningful name.

11. Click **Save**.

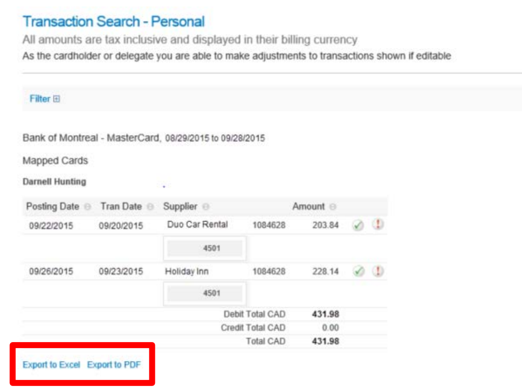
12. Once all search criteria has been entered, click **Search**.



13. Use the plus signs and hyperlinks to drill down to more detail as required.

14. With each screen, there is an option to export the details to **Excel** or save as a PDF.

15. Use the **Back** button to return to the previous list.



16. To run the report in future, select it from the **Report Templates**.