

Step-by-Step Guide

Procurement Card & Travel Reconciliation Expense Reports: Step 4a – Attaching Documents by Scan

There are three ways to attach documents to an expense report in the Concur Travel & Expense System: scanning, faxing, or using the Receipt Store to attach to individual expenses.

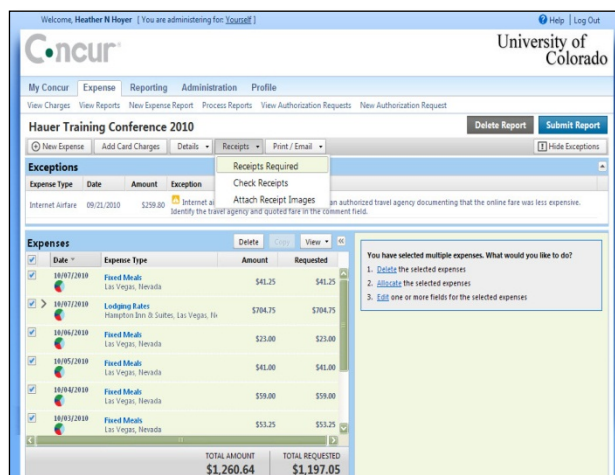
Note: Approvers have the ability to attach additional documents to a report that has been submitted to them for review. However, documents cannot be deleted once the expense report is submitted.

When attaching documents via scan, documents are attached to the expense report as a whole rather than to an individual expense within the expense report. Organize your documents in a manner that makes sense to your department. Since each scanned file will appear as its own bookmark when you view it, it may make sense to split the documents into multiple scans. For example, each scan may be a different date, or a different supplier.

The first step was to create your expense report by completing the Report Header. Then, expenses were added to your expense report and allocated. Now it is time to attach documentation to your expense report.

To view a list of required documentation for your expense report, use the **Receipts** dropdown and select **Receipts Required**.

The Receipt Review window appears, which lists only those expenses on this expense report that require documentation.



Scan the required documentation and save the images to your computer (or other appropriate space as per your department). You can use clear sleeves (also known as document carriers) to help scan smaller documents.

If the document was emailed to you, you can more than likely save that image to your computer (or other appropriate space) and follow this process to attach it to your expense report. No scanning is needed!

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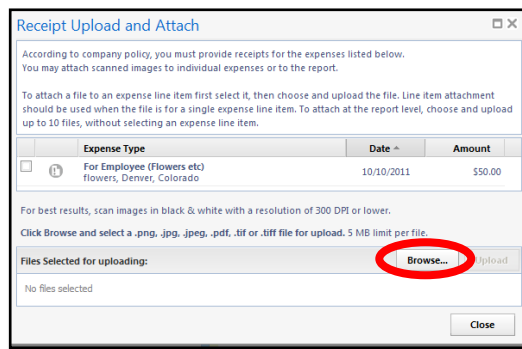
When you are ready to attach the images, click the **Attach Receipt Images** button.

A separate window will appear.

Attaching scanned receipts to an expense report is similar to attaching a document to an email. Click **Browse**.

The Choose File to Upload window opens.

Locate and select the receipt image you would like to attach and click **Open**.



The receipt images to be attached will be listed under **Files Selected for uploading**. You can attach up to 10 files – each file no more than 5 MB in size – at a time.

Once all appropriate filenames appear for uploading, click **Upload**.

The status of each file will change to *Attached* once it has been uploaded.

Click **Close** once every file listed has a status of *Attached*. Repeat this process as many times as needed until all required documentation is attached to your expense report.

No matter your method for attaching, you always want to review the attached images. To do this, use the **Receipts** dropdown and select **Check Receipts**. (The Check Receipts option will change to two options after your first review: View Receipts in New Window and View Receipts in Current Window.) Your attached images will appear in a separate window. After reviewing your images, close the window.

Now that you have attached scanned documents to your expense report, you are ready to go on to [Step 5 – Setting Approval Flow](#).