

## Step-by-Step Guide

### *Procurement Card & Travel Reconciliation Expense Reports: Step 4b – Attaching Documents by Fax*

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.

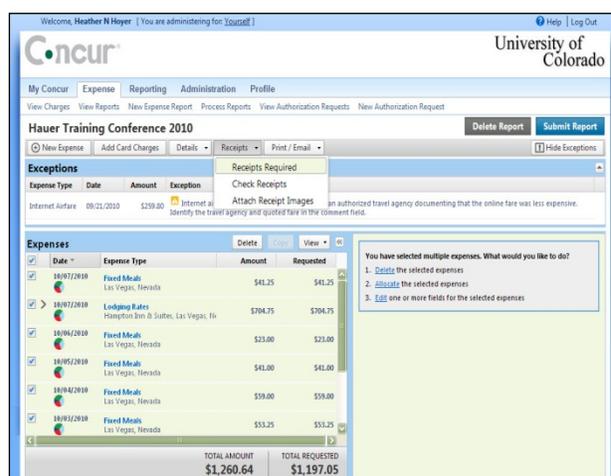
**Note:** Approvers have the ability to attach additional documents to a report that has been submitted to them for review. However, documents cannot be deleted once the expense report is submitted.

When attaching documents via fax, 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 fax will appear as its own bookmark when you view it, it may make sense to split the documents into multiple faxes. For example, each fax 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.



To print a fax cover page, use the **Print** dropdown and select **CU Fax Receipt Cover Page**. The Fax Cover Page window opens.

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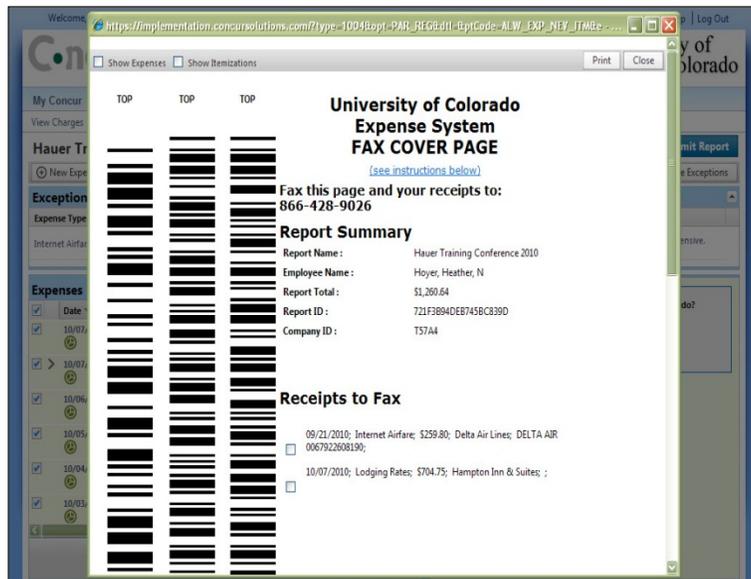
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The number to fax the documents to appears close to the top of the fax cover page.

The bar code on the left of the fax cover page identifies to Concur the expense report to which the documents should be attached.

**Note:** Make sure the bar code is crisp and clear. Smudged bar codes, or paper wrinkled in the bar code area, may not attach your documents successfully.

Click **Print**, and then click Close.



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 faxed documents to your expense report, you are ready to go on to [Step 5 – Setting Approval Flow](#).*