

Step-by-Step Guide

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

There are three ways to attach documents to an expense report in the Concur Travel & Expense System: the Available Receipts area, scanning, or faxing.

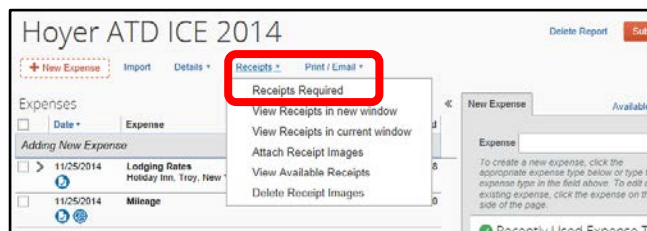
Note: Approvers have the ability to attach additional documents to a report that has been submitted to them for review. However, documents cannot be deleted once the expense report is submitted.

Scanned documents can be attached to an individual expense, or to the expense report as a whole. Attaching at the expense report level will allow you to include documents for multiple expenses within the same scan – to help with the review process, organize your documents in a manner that makes sense to your department (for example, by date or by supplier).

The first step was to create your expense report by completing the Report Header. Then, expenses were added to your expense report and (if needed) 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.



Begin by scanning the required documentation and saving the images to an appropriate area where you can find them.

What if the receipt was emailed?

If the receipt was emailed to you, no scanning is needed! You can more than likely just save that image to an appropriate area and follow this attachment process. Or, you can upload the image to your Available Receipts area (visit the Step-by-Step Guide [Step 4a – Attaching Documents Using the Available Receipts Area](#) for details).

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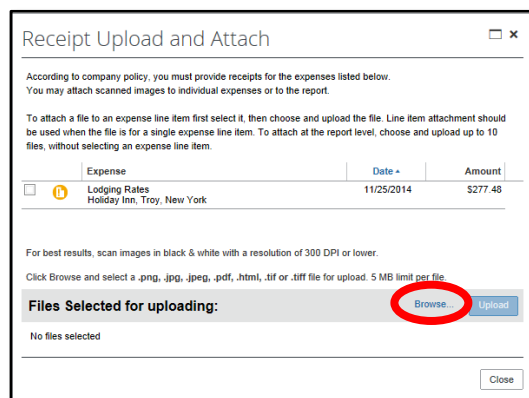
When you are ready to attach the images, use the **Receipts** dropdown and select **Attach Receipt Images**.

A separate window will appear.

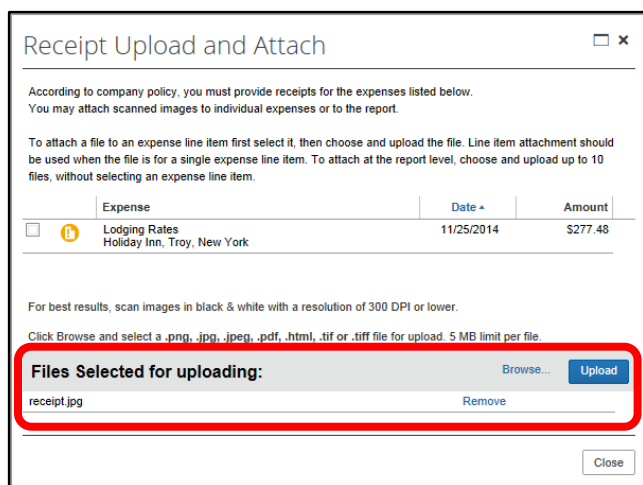
Attaching scanned receipts to an expense report is similar to attaching a document to an email. Click **Browse**.

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 either **View Receipts in new window** or **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](#).