Concur Expense: Attaching Documents Using the Available Receipts Area [1]

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.

Read the procedures

What is the Available Receipts area?

The Available Receipts area is a feature within Concur that provides a document repository to which you can email or upload images. You can then use your Available Receipts area to attach images to an individual expense. This can make the approval process easier for your approver(s) because the expense and document(s) are displayed side-by-side.

Note for delegates: You can view someone else's Available Receipts area if you were granted permission to view receipts when identified as his or her delegate.

Adding Images to Your Available Receipts Area

There are four ways to add images to your Available Receipts area:

1. Upload images directly to your Available Receipts area.
2. Forward emails of receipts (receipts can either be attached to the email or embedded in the email content) to receipts@concur.com [2].
3. Use your mobile device to take pictures of receipts and email the pictures to receipts@concur.com [2].
4. Use Concur Mobile [3] to take pictures of receipts, which are then stored in your Available Receipts area automatically

Before sending emails to receipts@concur.com [2], you must first verify your email address(es). Visit the Concur General: Completing your Profile [4] page for further guidance.

Uploading Images Directly to Your Available Receipts Area

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

When you are ready to upload the images, there are several ways to upload them.

One way is to click **Expense** from the top menu and locate your Available Receipts area at the bottom of the page. Click the **+Upload New Receipt** box, then click the **Browse**… link. Locate and select the image you would like to upload and click **Open**. You can upload 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 *Uploaded* once it has been uploaded to your Available Receipts area.

Another way to upload images is to simply drag and drop files to your Available Receipts area. (Drag and drop means to put your mouse over the file, hold down the left mouse button while moving the mouse to your Available Receipts area, and drop the file by letting releasing the left mouse button.)

Attaching Images to Individual Expenses Using Your Available Receipts Area

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 images within your Available Receipts area to your expenses.

The *Missing Receipt* icon will appear for expenses requiring documentation.

Select an expense so the details appear in your right-hand pane. Click the **Available Receipts** link. Attach the image by clicking on the green *Attach* icon in the upper left corner of the image thumbnail.

You can view the image before attaching the document by opening the document using the blue *View Image* icon.

Your Available Receipts area will remain open as you select another expense. Repeat this process as many times as needed until all required documentation is attached to your expenses within your expense report.

To close your Available Receipts area, click the X in the upper right corner of your Available Receipts pane.

No matter your method for attaching, you always want to review the attached images.

One way to do this is to select an expense and click the **Receipt Image** tab above the expense's details (along the top of your right-hand pane).

Detaching Images from Individual Expenses

Select the expense and click the **Receipt Image** tab above the expense's details (along the top of your right-hand pane, as illustrated above). Click **Detach from Entry**

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Your detached image is returned to your Available Receipts area, where it will remain until it is attached to an individual expense or deleted from your Available Receipts area (see below).

Deleting Images from Your Available Receipts Area

Note: If the image is attached to an individual expense, it must first be detached before you can delete it from your Available Receipts area (see above).

Click the **Available Receipts** link, if needed. Locate the appropriate image for deletion. Then, delete it by clicking the **Delete** link in the upper right corner of the image thumbnail.

A confirmation message will appear; click **Yes** to delete the image from your Available Receipts area, otherwise click **No**.

Links
[1] https://www.cu.edu/psc/training/attaching-documents-using-the-available-receipts-area
[2] mailto:receipts@concur.com [3] https://www.cu.edu/psc/policies/using-concur-mobile
[4] https://www.cu.edu/psc/training/booking-travel/completing-your-profile-concur