SAP CONCUR How-To Sheets for Contract Instructors
Using SAP Concur Optical Character Recognition to Create Expense Lines (Saves time!)

This how-to sheet outlines efficient methods to get receipts into SAP Concur. Additionally, SAP Concur will 'read' your receipts using Optical Character Recognition (OCR) and will create expense lines for you.

The languages supported by Optical Character Recognition:
English, French (EU, CA), German, Danish, Dutch, Swedish, Finnish, Norwegian

Important note:
Retain paper receipts until you have received payment.

THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A MOBILE DEVICE

1. **Important note: This example uses an iPhone. Look/ feel and navigation will vary on Android powered devices and/ or iPads.**

   ## OPTION 1: TAKING PHOTOS OF RECEIPTS

   From the SAP Concur App, tap on the blue 'ExpenseIt' button.
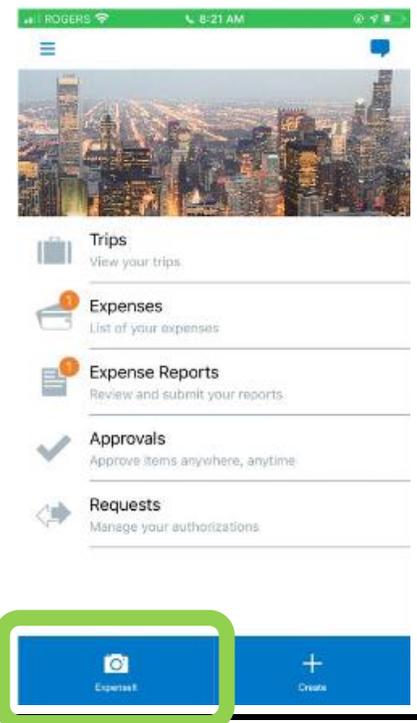
2. Take a photo of the receipt. In this example, one photo captures the entire receipt ().

If the receipt cannot be captured with a single photo, multiple photos can be taken and combined into a single receipt ().

Tip: Avoid taking a photo of a white receipt on a white surface. Contrast will help the App capture the image.

3. Make sure that the captured image is legible. Reports with illegible receipts will not be approved.

The SAP Concur App will use Optical Character Recognition (OCR) to read the amount of the receipt.

Review the amount. If incorrect, tap the 'Incorrect' button and follow the prompts to adjust the amount.

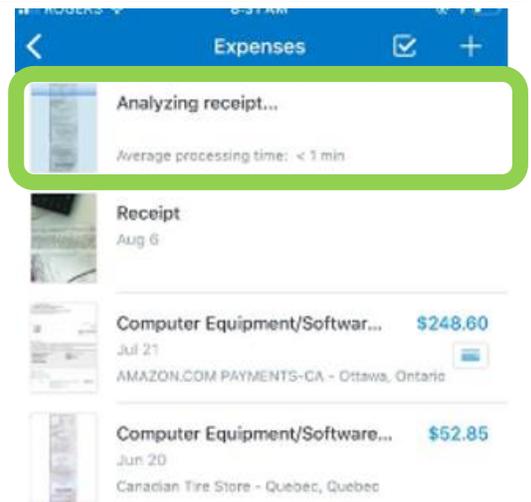When you are satisfied, tap the correct amount (e.g. 52.85 in this example).

Click done to complete this step (not shown).

Confirm Amount

What is the amount on this receipt ?

52.85

Incorrect

4. The SAP Concur App will use OCR to read the remaining information and create an expense line.

   List of OCR analyzed expenses lines will be displayed.

   Tap on the newly created expense line.

5. Review the pre-populated information to ensure that it is correct. Most fields can be edited.

   At this stage, the expense line can be added to a report by tapping the blue 'Move to Report' button.

   Tip: Even if you are not immediately moving the expense line to a report, it is a best practice to reivew the details while you have the receipt in hand.

   IMPORTANT! Do not thow your receipt away. Retain the paper receipt until you have received payment.

   Tip: When travelling, you may not choose to pay for roaming charges on your mobile device. Steps 1 through 3 can be completed without using your data plan. Once you have access to Wi-Fi you can retrieve the expense from your 'Expense Library' and create your report.
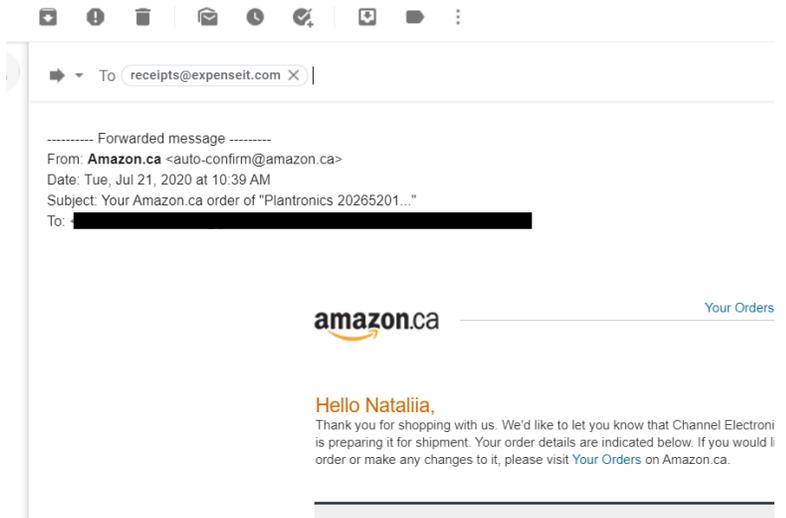
6.	**OPTION 2: EMAIL A RECEIPT TO RECEIPTS@EXPENSEIT.COM**	
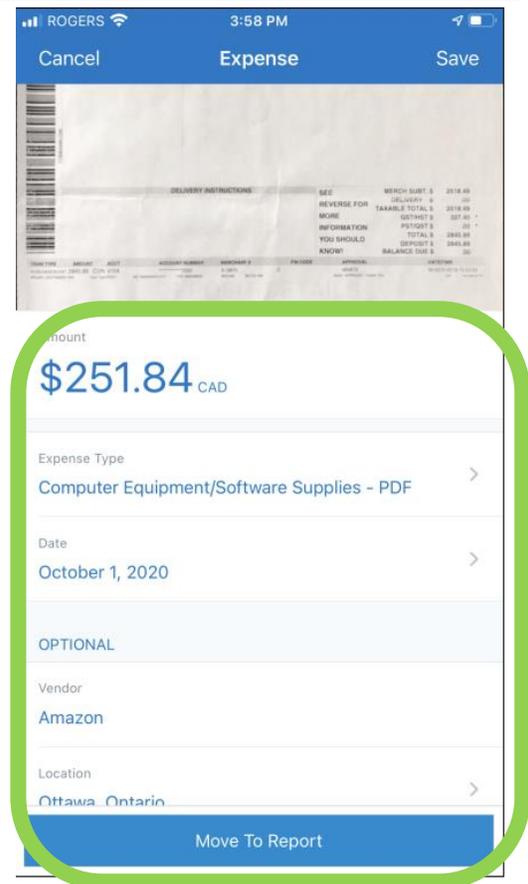
OPTION 2: EMAIL A RECEIPT TO RECEIPTS@EXPENSEIT.COM

When you email receipts to receipts@expenseit.com **using a verified email address***, the SAP Concur App will use OCR to create an expense line with the receipt image attached.
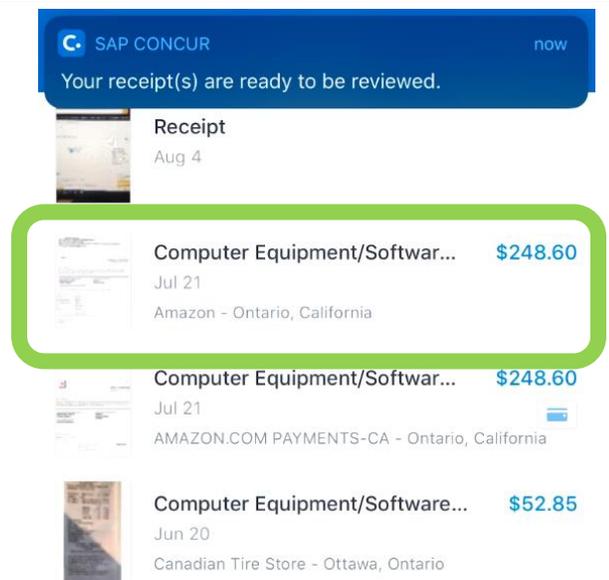
From your inbox, forward the email to **receipts@expenseit.com**.

* Visit carleton.ca/facts/travel/contract-instructors to the related how-to sheet and/ or contact financial.systems@carleton.ca if you require support verifying a personal email address.

---------- Forwarded message ----------
From: **Amazon.ca** <auto-confirm@amazon.ca>
Date: Tue, Jul 21, 2020 at 10:39 AM
Subject: Your Amazon.ca order of "Plantronics 20265201..."
To:

amazon.ca   Your Orders

Hello Nataliia,
Thank you for shopping with us. We'd like to let you know that Channel Electroni is preparing it for shipment. Your order details are indicated below. If you would li order or make any changes to it, please visit Your Orders on Amazon.ca.

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7. Return to the SAP Concur App to retrieve the expense line.

Tap on the expense line that matches the receipt you just forwarded to receipts@expenseit.com.

C· SAP CONCUR   now
Your receipt(s) are ready to be reviewed.

Receipt
Aug 4

Computer Equipment/Softwar... $248.60
Jul 21
Amazon - Ontario, California

Computer Equipment/Softwar... $248.60
Jul 21
AMAZON.COM PAYMENTS-CA - Ontario, California

Computer Equipment/Software... $52.85
Jun 20
Canadian Tire Store - Ottawa, Ontario

8.   OCR has populated the 'Expense' fields.

     Review the fields. Some corrections may be
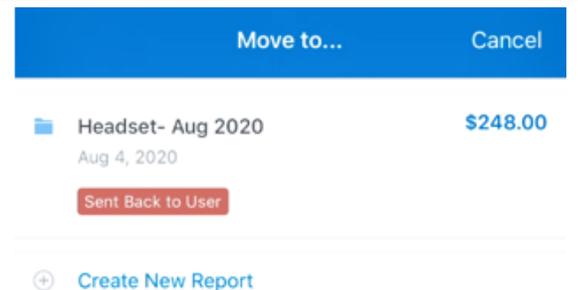   required.

     When you are satisfied that the details are
     correct, tap on the blue 'Move to Report'
     button.
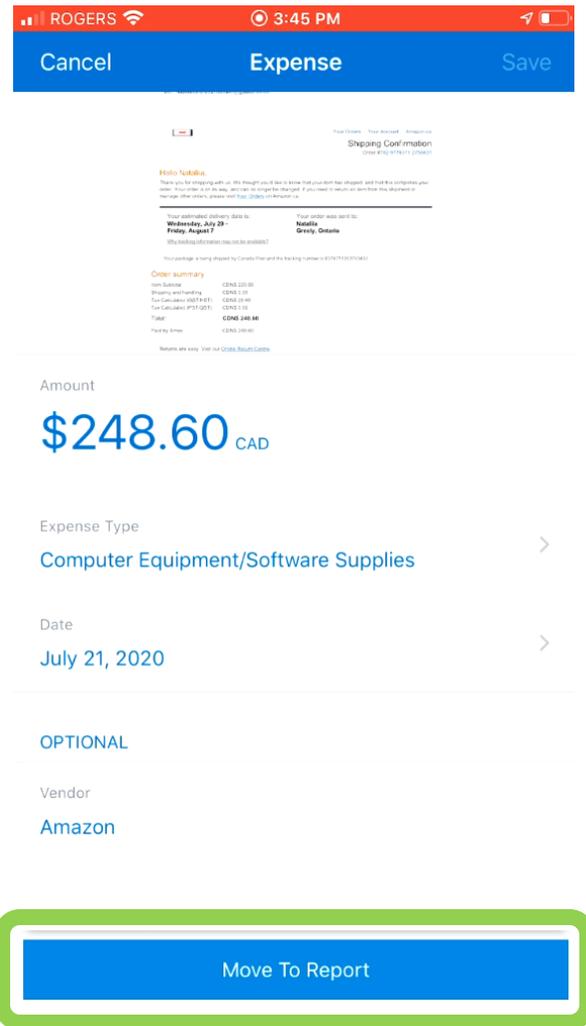
9.   To add this expense to **an existing report**, tap
     on the title of an existing report name (i.e.
     Headset – Aug 2020).

     OR

     Tap on 'Create New Report' to add the expense
     to a **new report**.

What next?
- Visit carleton.ca/facts/travel/contract-instructors to find more how-to sheets.
- Questions about the system? Email financial.systems@carleton.ca.