

# SAP CONCUR How-To Sheets

## Adding Multiple Documents to an Expense Report

Documentation is required to support your expense reports. You may have to attach multiple documents to an expense line or add extra documents to the report.

This how-to sheet outlines the steps required to:

- Add multiple documents to the same expense line
- Add a document to the report

**THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP**

### 1a. Attaching a second document to an expense line

A report has been started.

An expense line has been created with a legible, itemized receipt attached.

In this example, a conference agenda is required in addition to the receipt to show whether meals have been included in the conference registration fees. Carleton policy does not allow a travel allowance to be claimed for meals that have been paid for through conference registration fees.

The screenshot shows the SAP Concur 'New Expense' form. The 'Expense Type' is 'Conference/ Registration Fees', 'Account Code' is '719100 - Conference, Meeting Tr...', 'Transaction Date' is '17/02/2021', 'City of Purchase' is 'Ottawa, Ontario', and 'Amount' is '175.00'. The 'Payment Type' is 'Out of Pocket' and 'Receipt Status' is 'Receipt'. A receipt from 'Eliucian' is attached to the expense line. The receipt details include 'Eliucian LIVE 2021', 'Invoice No: 022', 'Created: 17 Feb 2021', and a table of items:

Item	Qty	Type	Price	Total
Full Conference Pass	1	Payment	\$175.00	\$175.00
<b>Total</b>			<b>\$175.00</b>	<b>\$175.00</b>

The receipt also shows 'Accepted Payments' and 'Total' of \$175.00, with 'Total Payments' of \$175.00 and 'Balance Due' of \$0.00.

## 1b. Attaching a second document to an expense line

To attach a second receipt, click the blue 'Save Expense' button.

The screenshot shows the 'New Expense' form in SAP Concur. The 'Expense Type' is 'Conference/ Registration Fees', 'Account Code' is '719100 - Conference, Meeting Tr...', and 'Amount' is '175.00'. The 'Receipt Status' is 'Receipt'. A preview of an 'Invoice' from 'ellucian/LIVE 2021' is shown on the right, with a total of \$175.00. A large green arrow points to the 'Save Expense' button at the bottom of the form.

## 1c. Attaching a second document to an expense line

In the new screen, click on the expense line.

The screenshot shows the 'Adding to pick list \$175.00' screen in SAP Concur. It displays a table with one expense line: 'Out of Pocket' for 'Conference/ Registration Fees' from 'Ellucian Ottawa, Ontario' on '17/02/2021' for '\$175.00'. A green box highlights this row. Buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to' are visible above the table.

## 1d. Attaching a second document to an expense line

There is now an 'Append' button.

**TIP:** Depending on the size of your screen, you may need to scroll down to see the 'Append' button.

In this example, the 'Append' button can be used to attach the conference agenda.

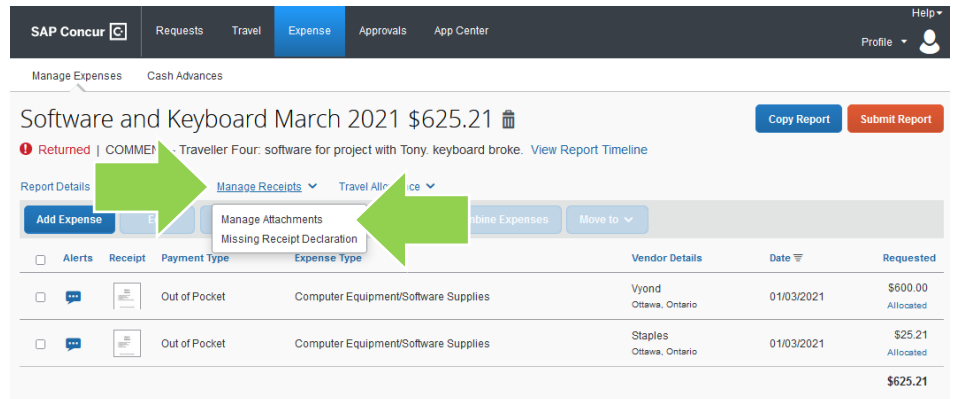
The screenshot shows the 'Append' button on the 'Conference/ Registration Fees \$175.00' expense line. The 'Receipt Status' is 'Receipt'. A preview of the 'Invoice' is shown on the right. A large green arrow points to the 'Append' button at the bottom of the invoice preview.

## 2. Attaching documents to an expense report

You can also attach documents to the report.


To do this, click on the blue **'Manage Receipts'** text and choose **'Manage Attachments'**.

Follow the prompts.



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Manage Expenses | Cash Advances





Software and Keyboard March 2021 \$625.21  [Copy Report](#) [Submit Report](#)

**Returned** | COMMENT: Traveller Four: software for project with Tony. keyboard broke. [View Report Timeline](#)

Report Details | **Manage Receipts** | Travel Allocation

[Add Expense](#) | [Manage Attachments](#) | [Combine Expenses](#) | [Move to](#)

Missing Receipt Declaration

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			Out of Pocket	Computer Equipment/Software Supplies	Vyond Ottawa, Ontario	01/03/2021	\$600.00 Allocated
<input type="checkbox"/>			Out of Pocket	Computer Equipment/Software Supplies	Staples Ottawa, Ontario	01/03/2021	\$25.21 Allocated
							<b>\$625.21</b>

### What next?

- Visit [carleton.ca/facts/travel](http://carleton.ca/facts/travel) to find more how-to sheets.
- Questions about the system? Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).