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 notes:**
- <u>**Retain paper receipts until you have received payment.**</u>

**Governing Policies can be found on the University Secretariat's site:**
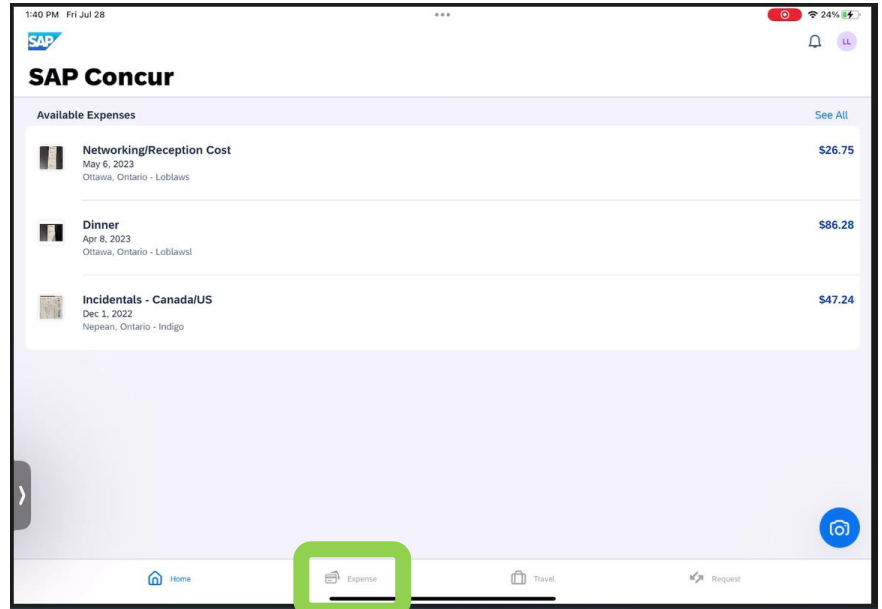- Travel and Related Expenses
- Hospitality and Working Meal Expenses
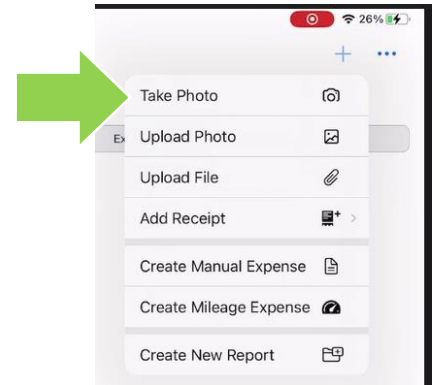- Alcohol and Cannabis Use Policy

1. This example uses an iPhone. Your device may look slightly different.

   ## OPTION 1:
   ## TAKING PHOTOS OF RECEIPTS

   From the SAP Concur App, tap on **'Expense'**.



From the drop-down menu, tap '**Take Photo**'.

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 the photo of a white
receipt on a white surface.  Contrast
will help the App capture the image.



3.    Tap the white **'Done'** button.

**Important.**  Make sure that the
captured image is legible.  Illegible
receipts will not be accepted.

**Tip for delegates:** When acting as a
delegate, delegates can take advantage
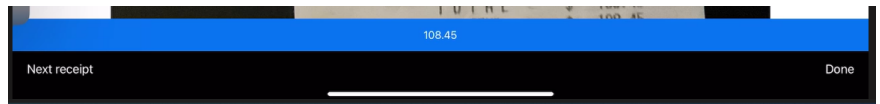of steps 1 through 3.

4. 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. 108.45 in this example).
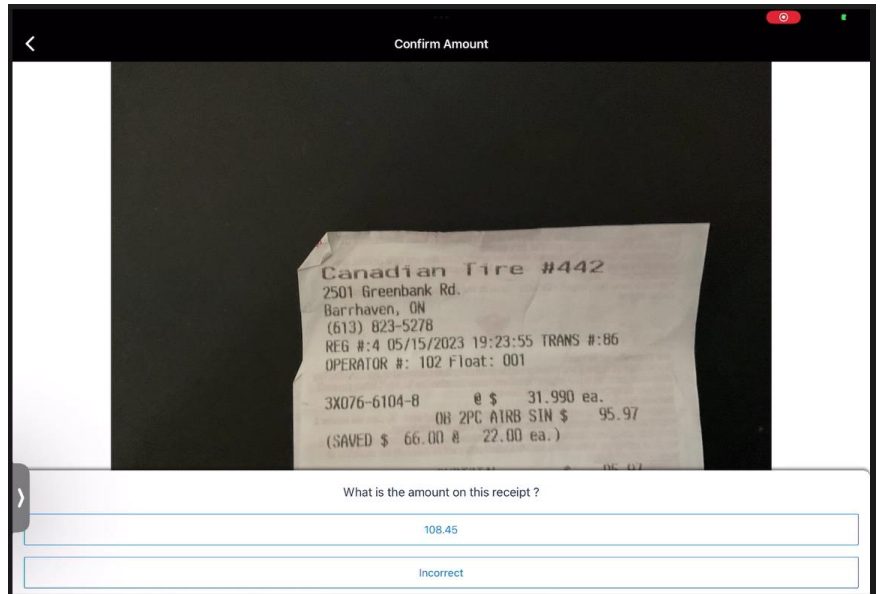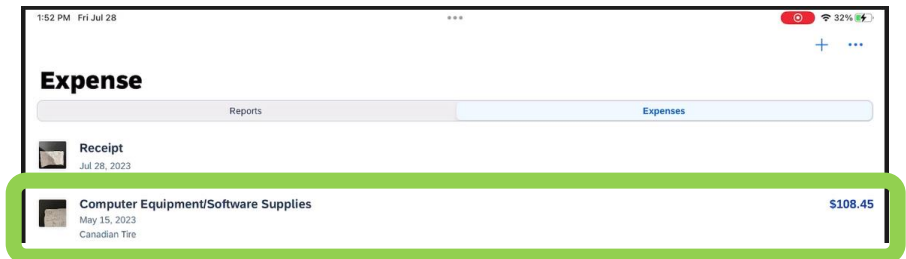


   Tap the white '**Done**' text to complete this step.



5. 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.

6. 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 moving the expense line to a report, it is a best practice to reivew the details while you have the receipt in hand.

**IMPORTANT! <u>Do not thow your receipt away. Retain the paper receipt until you have received payment.</u>**

**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.

| 7. | **OPTION 2:**<br>**EMAIL A RECEIPT TO**<br>**RECEIPTS@EXPENSEIT.COM** |  |
|----|---|---|

When you email receipts to receipts@expenseit.com **using a verified email address\***, the SAP Concur App will use Optical Character Recognition (OCR) to create an expense line with a receipt attached.

From your inbox, forward the email to receipts@expenseit.com.

**TIP FOR DELEGATES:** If you are forwarding a receipt for a claimant, include their verified email address in the email's subject line.
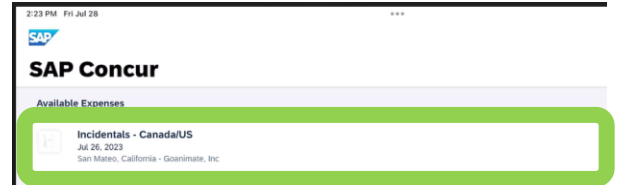
\* Visit carleton.ca/facts/travel to the related how-to sheet and/ or contact financial.systems@carleton.ca if you require support verifying a personal email address.
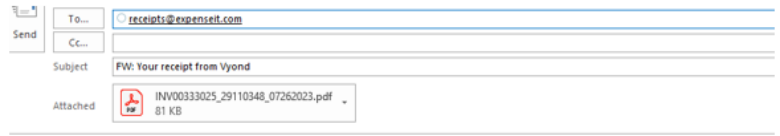
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| 8. | Return to the SAP Concur App or your desktop to retrieve the expense line.<br><br>Tap on the expense line that matches the image of the receipt you just forwarded to receipts@expenseit.com. |  |
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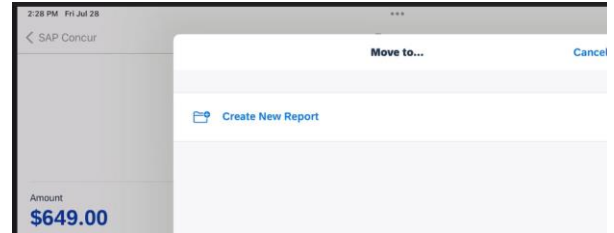| 9. | OCR has populated the 'Expense' fields.<br><br>Review the fields. Some corrections may be required.<br><br>When you are satisfied that the details are correct, tap on the blue '**Move to Report**' button. |  |
|----|---|---|
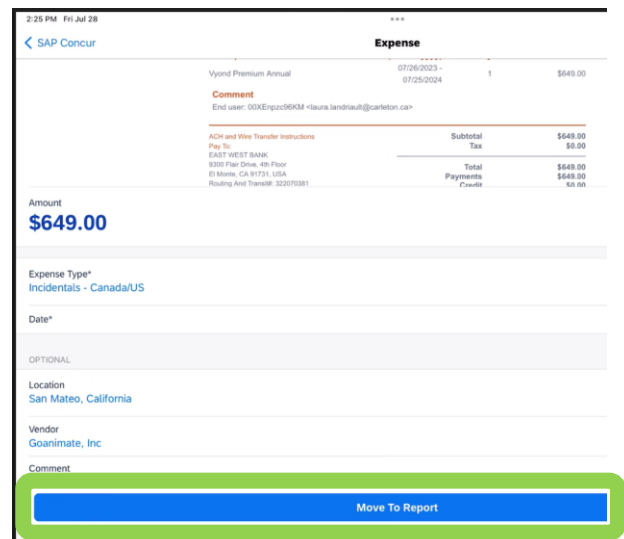
10. To add this expense to **an existing report**, tap on the title of an existing report name.

   OR

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

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