

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

Last updated December 11, 2023.

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. A conference registration is required to show whether meals have been included in the conference agenda. 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 and a receipt. The form is titled 'New Expense' and has tabs for 'Details' and 'Itemizations'. The 'Details' tab is active, showing the following information:

- Expense Type: Conferencel/ Registration Fees
- Account Code: 719100 - Conference, Meeting Travel - General
- Transaction Date: 24/07/2023
- Event Vendor Name: IMUC 2023
- City of Purchase: Vancouver, British Columbia
- Payment Type: Out of Pocket
- Amount: 532.57
- Currency: Canada, Dollar (CAD)
- Tax Posted Amount: [blank]
- Receipt Status: Receipt
- Comment: [blank]

The receipt is titled 'eventbrite' and shows the following information:

- Event: IMUC 2023, Vancouver, British Columbia, Canada
- Item: Early Bird Registration CAS32.57
- Event Dates: Monday, October 16, 2023 at 8:00 PM - Wednesday, October 18, 2023 at 1:00 PM (PST)
- Event Location: Pan Pacific Vancouver, 980 Canada Place, #1000, Vancouver, BC V6C 3B5, Canada
- Event Status: Completed
- Order #: 20231016000, Order Ref: [redacted]
- Order Date: 2023-10-16 11:00 AM

The receipt also includes a QR code and a 'Receipt' button.

- 1b. To attach a second receipt, click the blue **'Save Expense'** button.

- 1c. In the new screen, click on the expense line.



Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket	Conference/Registration Fees	IMUC 2023 Vancouver, British Columbia	24/07/2023	\$532.57

- 1d. There is now an 'Add' button.

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

In this example, the **'Add'** button can be used to attach a conference agenda.

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 click on **'Manage Attachments'**. Follow the prompts.

What next?

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