

Attaching Documents to an Expense Report

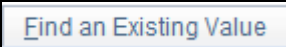
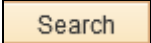
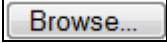
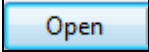
T&E enables you to attach documents to Travel Authorizations, Cash Advances, Expense Reports, and My Wallet transactions.

In this topic, you will attach a conference agenda document at the header level of an expense report and a hotel receipt at the expense line level. Then you will save the expense report.

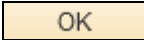
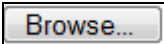
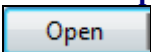
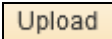
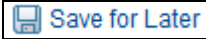


Navigation: Main Menu > Employee Self-Service > Travel and Expense Center > Expense Reports > Create/Modify

Other path: Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > Create/Modify

Step	Action
1.	Click the Find an Existing Value tab. 
2.	Enter the Report ID number in the begins with field and/or use the other keys to filter your search. You can also leave the fields blank and click the Search button to return results.
3.	For this training example, enter a valid value e.g. " 0000175612 " into the Report ID field.
4.	Click the Search button. 
5.	You want to add an attachment with trip information that does not relate to a specific expense line, so you will add it at the header level. Notice there are no attachments at present. Click the Attachments link. 
6.	Use the Expense Report Attachments page to add new attachments, view existing attachments, or remove attachments.
7.	Click the Add Attachment button. 
8.	Click in the Browse... button. 
9.	Navigate to the location where you stored your attachment and select it. For this training example, click the Conference Agenda.docx file.
10.	Click the Open button. 
11.	Click the Upload button. 

Quick Reference Guide

Step	Action
12.	The file will appear in the File Name column. If desired, you can enter a document description in the Description field.
13.	To add another attachment, you click the Add Attachment button again.
14.	In this training example, you are adding only one attachment at the header level. Click the OK button. 
15.	Notice that the number for the Attachments link is a (1). This means there is one attachment. The system updates this number every time you add or delete an attachment.
16.	Next, you want to add an attachment related to the hotel expense. In the Hotel - Hotel Rate expense line, click the paperclip icon (located to the right of the Payment Type column). 
17.	The Expense Line Attachments page will display. Click the Add Attachment button. 
18.	Click the Browse... button. 
19.	Navigate to the location where you stored your attachment and select it. For this training example, click the MarriottReceipt.docx file.
20.	Click the Open button. 
21.	Click the Upload button. 
22.	The file appears in the File Name column. If desired, you can add a document description in the Description field. Click the OK button. 
23.	Notice that the paperclip icon no longer has a green plus sign by it. This indicates there is an attachment for the line.
24.	Click the Save for Later link. 
25.	You have successfully attached a document to the header and expense line levels of an expense report. End of Procedure.