Concur Tip Sheet:

Adding Documents to the Report Header



Overview

University Guidance requires several documents (when applicable) be attached at the Header. This tip sheet provides instructions on how to attach or remove a document/documents at the Report Header.

Documents may include:

- Vaccination and Booster Attestation Form
- Proof of Registration with International SOS (iSOS)/ Registration receipt from iSOS
- Add Pay Form
- Exception Letters
- Paper MRA
- Signed Report submitted by a Proxy Delegate (Delegate Exception*)
- Email giving Proxy Delegate permission to submit the report on behalf of the traveler

To attach a document:

- 1. Create a new expense report or select an open report.
- 2. Select Manage Receipts > Manage Attachments

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3. This will open a window which will enable you to select a document to upload



4. Select the image, click Append and the click anywhere outside of the box to finish.





Adding Documents to the Report Header

5. To view the document at the Report Header, click Manage Receipts > Manage Attachments and the document will appear.



6. To remove a document, click Manage Receipts > Manage Attachments scroll to the document you want to remove and click Delete (See on image above).

