

SAP T&E; – How to attach a receipt to a report of another employees

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Title

SAP T&E; – How to attach a receipt to a report of another employees

Purpose:

Follow this procedure when a user needs assistance to attach a receipt to a report of another employee.

Required Information to be documented in each Incident:

Contact NameContact NumberClinic / Facility NumberDetailed Description of the issue.Screen shot of the Error

Troubleshooting Process

1.

Confirm with user that the issue matches the issue reported.

2.

Please document required information and troubleshooting details in the incident.

3.

Please attach any referenced knowledge articles to the Incident.

4.

Please ensure the user is using the following.

Microsoft Edge BrowserTrip type is Trip with receipts.Receipts are in PDF format.

5.

Confirm the user has an admin role for the employee account they are working with.

6.

Click on the triangle symbol which is present before the folder Other Employee T&E;

7.

Enter the employee ID of the employee for which you want to file the expenses and click on the button Apply selection criteria and return to tree.

8.

Then the employee will show up on your list.

9.

Select the triangle icon which is present in front of the employee folder. This will open the list of trips with receipts for this employee.

10.

Double click on the trip for which you want to attach the receipts.

11.

Then select on the Create a new node element button which is present at the top.

12.

This will take you to an upload screen.

13.

Select on the Browse button to get the following popup window which will help locate the receipt file on your PC.

14.

Once you selected the file, then click on the Upload button to attach this receipt to the trip.

15.

You will be able to see the PDF attached to the trip.

16.

Select the Employee Self-Service tab to return to the Main menu.

17.

Follow the resolution process.

18

If assistance is still needed follow the escalation process.

Incident Classification Requirements

Category

Software & Applications

Subcategory

Enterprise & Financial Applications

Service

SAP T&E;

Resolution Process

Please review/update Classification and provide customer with the Incident number for their reference prior to resolving.

Incident Resolution Categorization

Resolution Code

Solved Remotely (Permanent

Resolution Category

Software & Applications

Resolution Subcategory

Enterprise & Financial Applications

Resolution Service

Should generally be identical to Service

Escalation Process

Please review/update Classification and provide customer with the Incident number for their reference prior to escalating

Escalation Group

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