Uploading Receipts in WORKS

1. Convert your original receipts to an electronic PDF file, and save them in a designated folder location in your computer.
    - You may find it convenient to use cell phone scanning applications such as Scannable, Scanbot, or Fast Scanner to capture the PDF image
    - Attach the image to an e-mail for easier handling
    - Consider a naming convention for saved receipt images that identifies the date, vendor/merchant, travel location, etc. Use whatever will be most helpful for you to locate the correct receipt for uploading into WORKS
    - If you have lost or did not receive a receipt, complete and upload the Lost Receipt Form.

2. From your WORKS home page, select “Transactions Pending Sign-off”
    - Click on a transaction to get the drop-down menu, then select “Manage Receipts”
    - In the Receipts dialog box, click “Add” then select “New Receipt”
    - In the Add Receipt dialog box
        - ❖ Click on “Browse” and open the receipt PDF file
        - ❖ Click “OK” and the receipt image will be attached to the transaction
        - ❖ It is not necessary to enter a receipt date or description in the boxes provided
        - ❖ The Receipt Description field here should not be confused with the business purpose/description you are required to enter in the Receipt Status comment box when signing-off for a transaction (see sign-off procedures)

3. To view attached receipts ***prior*** to transaction sign-off
    - From your Home page, select “Transactions Pending Sign-off”
    - Click on a transaction to get the drop-down menu, then select “View Receipts”
    - In the receipts dialog box, click on “View PDF”
    - Select “Open with Adobe Acrobat” then click “OK”

4. To view attached receipts ***after*** transaction sign-off
    - From your Home page, select “Transactions Signed-off”
    - Click on a transaction to get the drop-down menu, then select “View Full Details”
    - Select the “Receipts” tab
    - In the receipts dialog box, click on “View PDF”
    - Select “Open with Adobe Acrobat” then click “OK”