Overview
The Concur for Mobile app enables you to perform many of the same functions available in the Concur system, right from your smartphone. The app is especially useful in a few ways:

- Allows you to use your phone’s camera to capture images of receipts, which you can then upload directly to Concur, reducing the need to store and organize paper copies.
- Enables you to create individual expenses, attach receipts, and add the expenses to an expense report.

This Guide provides step-by-step instructions on completing some of the most common tasks available to you with the app.

Log into Concur for Mobile
When you launch the app, you will be prompted to sign in.

1. Tap the Concur for Mobile icon in your device apps list.
2. In the Username field, enter the email address associated with your Concur account. This is typically your “@harvard.edu” email address.
   - Alternatively, you can enter “your HUID@harvard.edu” as your username.
3. Tap Next.
4. In the Password field, enter the mobile PIN you created in your Concur profile.
5. Tap Sign In to Concur.

NOTE: At this time, the SSO Company Code Sign In function is not supported. All users should login to the app using this procedure.
The Home Screen

Once you log in, the Home screen appears. From here, you can access the main functions of the app.

In the middle of the screen, you can:
- Tap Expenses to view or edit any existing expenses.
- Tap Expense Reports to edit, review, and submit existing expense reports, or create a new report.

At the bottom of the screen are 3 buttons:
- The ExpenseIt button opens your phone’s camera, and you can either capture a new receipt by taking a photo or upload a previously taken photo from your camera roll. Receipt images are sent directly to Concur and will appear in your Available Receipts library.
- The Create button allows you to enter the information for a new expense and attach receipts. Once you save an expense, it is uploaded into the system and appears in your Available Expenses library. You can then associate the expense with a new or existing report.
- The Mileage button allows you to quickly enter a Personal Car Mileage expense and attach it to a new or existing expense report.
Uploading Receipts

The Concur for Mobile app integrates with your smartphone’s camera, and enables you to take photos of receipts using your phone and send them directly to your Available Receipts library. You can also upload receipt images from your phone’s Photo Album.

Capturing New Receipt Images

To capture new receipts:

1. At the bottom of the Home screen, tap ExpenseIt. The app opens your phone’s camera function.
2. Take a photo of the desired receipt. The app displays a preview image of the receipt.
3. If you do not like the quality of the image, tap Retake, and then take another image of the receipt.
4. Click Done when you are satisfied with the image to display a preview of the receipt and to confirm the receipt amount.
5. Confirm the amount or click the Incorrect button to enter the correct amount.
6. Click Done to upload the receipt to your Available Receipts library.
Uploading Receipts from your Photo Album

To upload receipt images from your phone’s Photo Album:
1. At the bottom of the Home screen, tap Expenses. The app opens your phone’s camera function.
2. At the lower left corner, tap the Photo Album icon.
3. Select the photo you want to upload and click Done. The app displays a preview image of the receipt.
4. If you do not like the quality of the image, tap Retake, and then take another image of the receipt or select a different image from your Photo Album.
5. Click Done when you are satisfied with the image to display a preview of the receipt and to confirm the receipt amount.
6. Confirm the amount or click the Incorrect button to enter the correct amount.
7. Click Done to upload the receipt to your Available Receipts library.
**Viewing Receipts**

Uploaded receipts that are not attached to a line item expense or expense report header are listed in your Available Receipts library.

To view a receipt in your Available Receipts library:
1. In the middle of the Home screen, tap **Expenses**. Your Available Expenses list appears.
2. Tap the receipt you want to view. The app displays the receipt image.
Creating Expenses

Concur for Mobile gives you the ability to enter expenses quickly and easily. To start, you enter a mobile expense, which includes the basic information about the expense, and gives you the option to add a receipt.

To create a mobile expense:

1. At the bottom of the Home screen, tap Create.
   - Alternatively, you can tap Expenses in the middle of the Home screen and then tap the + icon in the top right corner.

2. On the Expense screen, complete the fields. Fields marked with an asterisk (*) are required.

3. To add a receipt, tap Add Receipt, and then do one of the following:
   - Take a picture of the receipt
   - Select an existing image from your Photo Album
   - Select a receipt from your Available Receipts.

4. Tap Save. The mobile expense is added to your Available Expenses library.

Once you create the mobile expense, you can include more detailed information - for example, itemizing the expense - by adding it to an expense report, and then making any necessary additions or changes.
**Viewing and Editing Expenses**

To view and edit existing expenses:

1. On the home screen, tap **Expenses** to access your list of available expenses.
2. Tap the expense you want to view. The details for the expense appear.
3. On the Expense Details screen, you can make changes by tapping on a field and editing the information.
   **NOTE:** To make more extensive changes, such as itemizing or adding attendees:
   - Add the expense to a new expense report and then edit the expense.
   - Move the expense to an open expense report and then make your changes.
4. To add a receipt, tap **Add Receipt**, and then do one of the following:
   - Take a picture of the receipt
   - Select an existing image from your Photo Album
   - Select a receipt from your Receipts Store
5. Tap **Save**.
Deleting Expenses

To delete expenses from your Available Expenses list:

1. On the home screen, tap **Expenses** to access your list of available expenses.

2. In the upper right corner, tap the **Selection box**. Each expense now displays a selection circle on the left side.

3. Tap the selection buttons for each expense you want to delete.

4. In the lower right corner, tap **Delete**.
Creating a New Expense Report

There are a few ways you can create a new expense report using Concur for Mobile. Two of the most common ways you can create a new report are:

- From the Active Reports screen
- When adding an expense on the Expenses screen

From the Active Reports Screen

1. On the home screen, tap Expense Reports.
2. On the Active Reports screen, tap +
3. On the New Report screen:
   - Enter the Report Name
   - Enter the Policy
   - The Report Date defaults to the current date, but can be edited, if necessary
   - Enter the Business Purpose
     - Include the dates of the trip and why the trip is business-related
     - If you run out of space, use the Comment field
   - Select the account code string for the report.
     - Based on your Concur profile settings, some or all of the account code fields may be pre-populated, but you can edit them as needed.
     - If you don’t know what codes you should select, contact your Approver or TUB Finance office
   - NOTE: You can save the report without providing a full account code string, but you must select a TUB and ORG.
4. Tap Create.
5. On the Report screen, you can add expenses and attach receipts.
When Adding an Expense to a Report

1. On the home screen, tap Expenses.
2. On the Expenses screen, tap the Selection box.
3. Select the expense(s) you want to add.
4. Tap Move to…
5. On the Select Report screen, you can:
   - Tap the report name
   - Click Submit
   - Tap Create New Report
   - Enter all report information
   - Tap Create. The report will be created, and the selected expenses are automatically added to the report.
Adding Expenses to an Expense Report
After creating an expense report, you can easily attach any existing expenses, such as corporate card transactions or any out of pocket expenses you have already created.

To add existing expenses to an expense report:
1. On the home screen, tap Expenses to access your list of available expenses.
2. On the Expenses screen, tap the Selection box.
3. Select the expense(s) you want to add.
4. Tap Move to ....
5. Tap the desired report from the list. A confirmation message appears.
6. Tap Submit to submit the expense report.
Editing Expenses on an Expense Report

After adding an expense to a report, you can make a few other changes to the expense, including:

- Completing additional required fields based on the expense type
- Itemizing expenses, such as hotel stays
- Adding attendees to a business meal expense

To edit expenses on an expense report:

1. On the home screen, tap Expense Reports.
2. On the Active Reports screen, tap the report you want to view.
3. On the Report Details screen, tap the expense you want to edit.
4. Make the desired changes.
   - If there are any empty required fields, you must complete the field before you can save your changes
   - Review any exception messages for the expense and address them. Common exception resolutions include attaching a required receipt or adding a comment.

5. To add a receipt, tap View Receipt and Add Another. Do one of the following:
   - Take a picture of the receipt
   - Select an existing image from your Photo Album
   - Select a receipt from your Receipts Store

6. Tap Save.
**Itemizing Expenses**

Certain expense types, like hotel stays, must be itemized before you can submit a report. You may also need to itemize expenses if a portion of the expense is personal, and should not be reimbursed.

To itemize expenses:

1. On the home screen, tap **Expense Reports**.
2. On the Active Reports screen, tap the report you want to view.
3. On the Report screen, tap the desired expense.
4. On the Expense Details screen, tap **Itemize**.
5. On the Itemizations screen:
   - If it is a hotel stay:
     a. Enter the **Check-In** and **Check-Out Dates**.
     b. Enter the nightly **Room Rate** and **Room Tax**.
     c. Enter any other recurring charges during the stay, for example, daily parking changes.
   - For other expenses:
     a. Select the expense type.
     b. Complete the remaining fields.
6. Tap **Save**.

**NOTE:** If there is a remaining balance, tap + and create the remaining expenses to bring the remaining balance to zero.
Adding Attendees

For some expense types, like business meals, you may need to add attendees to the expense.

To add attendees to an expense:

1. On the home screen, tap Expense Reports.
2. On the Active Reports screen, tap the report you want to view.
3. On the Report screen, tap the desired expense.
4. On the Expense Details screen, tap Attendees.
5. On the Attendees screen, tap + to add
6. Select one of the following:
   - Add from Calendar
   - Select from Contact
     a. Choose the attendee from your phone’s contact list
   - Add Attendee Manually
     a. Select the Attendee Type
     b. Enter the attendee’s Last Name
     c. Enter the attendee’s First Name
     d. Tap Save.
   - Search for Attendee
     a. On the Search for Attendee screen, select either Quick Search or Advanced Search.
     b. Quick Search allows you to search the members of your Favorite Attendees list.
     c. Advanced Search enables you to conduct a search of all University personnel.
     d. On the Attendee Search Results screen, tap Select Attendee to Add
     e. Select the desired attendee(s) from the list
     f. Tap Add Attendee.
7. Once all the attendees are added, click back arrow to return to Expense Details.
8. Tap Save.
Submitting Expense Reports

IMPORTANT: Before submitting a report for approval, make sure that any exceptions have been addressed, and all required receipts are attached to the report.

To submit a report:
1. On the home screen, tap Expense Reports.
2. On the Active Reports screen, tap the report you want to view.
3. On the Report screen, tap Submit. The report is updated to Submitted status pending approval.

Resources

Quick Reference Guides and Online Tutorials
Quick Reference Guides provide step-by-step instructions on a number of common tasks in Concur, and online tutorials present a video walk-through of how to perform various tasks and procedures within the system. Both the Guides and online tutorials are available at: https://travel.harvard.edu/concur-training

Concur Support
24 hour support is available through the Concur Support Desk at 866-793-4040. You can also access the Concur Support Portal within the system by clicking the Help menu, and then selecting Contact Support.