Concur Tip Sheet:

Using the Concur Mobile App

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 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.

*Please note: Report creation, submission, and approval of PCard Statement Reports is not available via mobile app. Receipt photo's taken via Concur Mobile will appear in the available receipt's library.

Log into Concur 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**. This will bring you to a page prompting you to sign in using **HarvardKey**.
4. Enter your HarvardKey, complete **DUO authentication** and continue to the application.
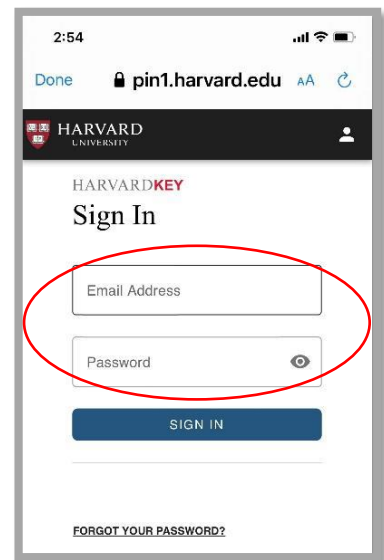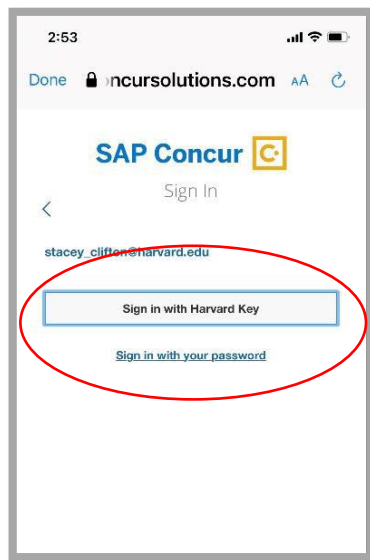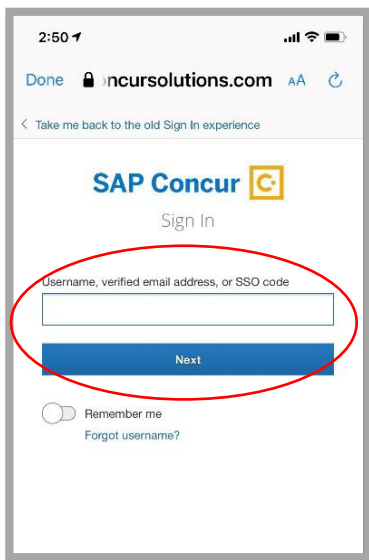
The Home Screen

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 three 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.

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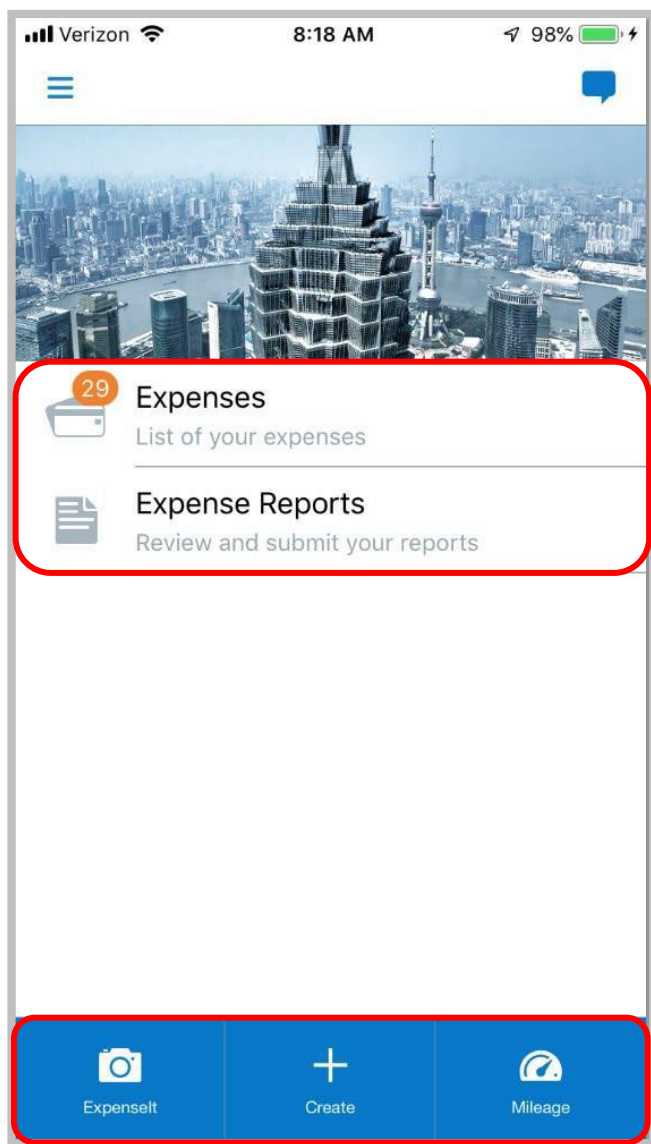
Uploading Receipts

The Concur for Mobile app integrates with your smartphone's camera, enabling 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. At the top you will see two "page" icons, clicking on the multiple "page" icon gives you the option of taking pictures of multiple page receipts.

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.
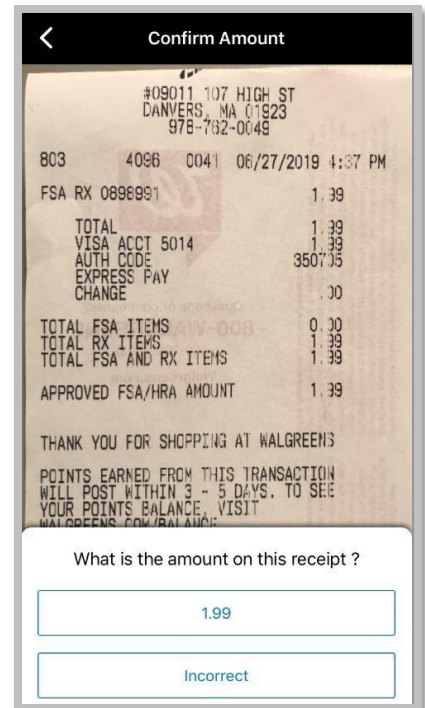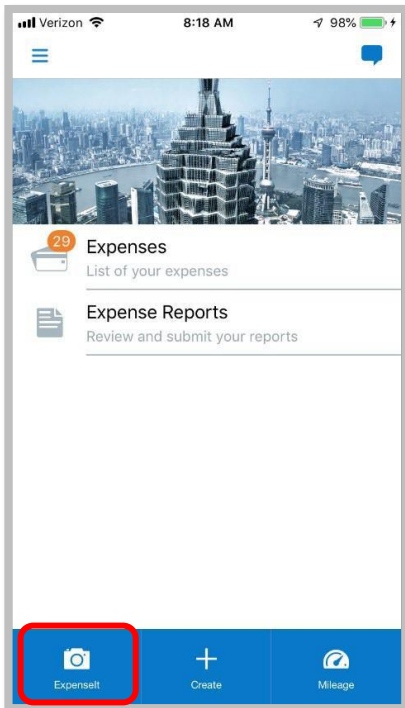
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Uploading Receipts from your Photo Album

To upload receipt images from your phone's Photo Album:

1. At the bottom of the Home screen, tap **ExpenseIt.** 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
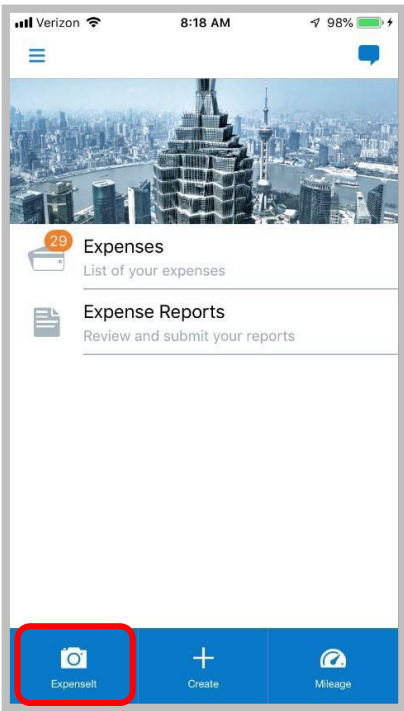
Viewing Receipts

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.
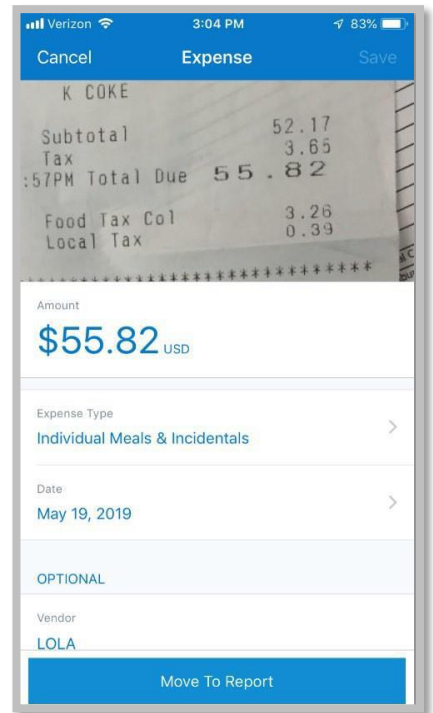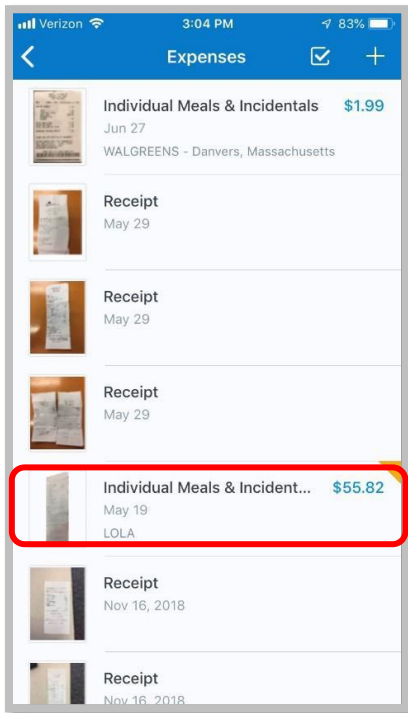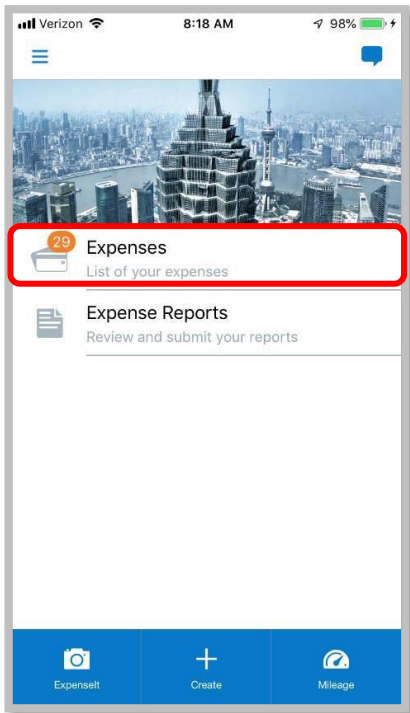
Creating Expenses

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.
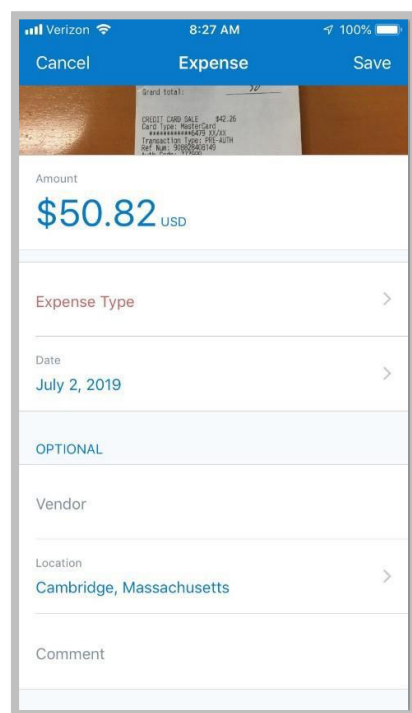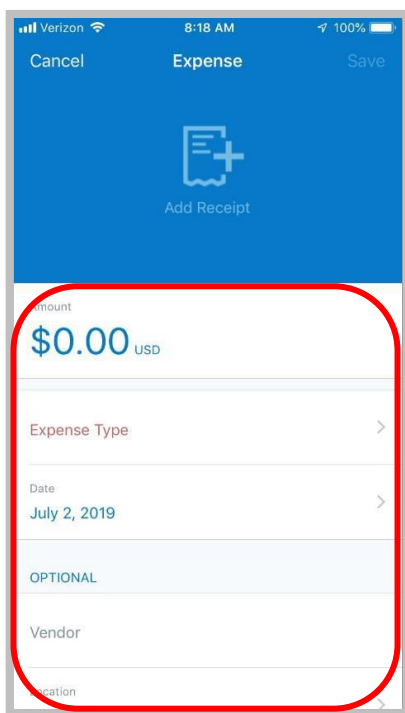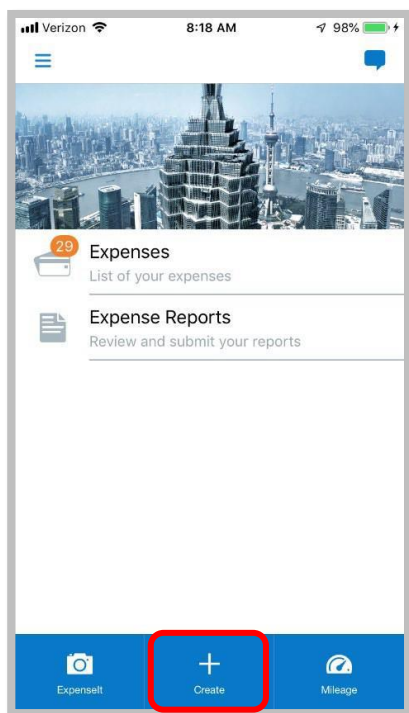
Viewing and Editing Expenses

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**.
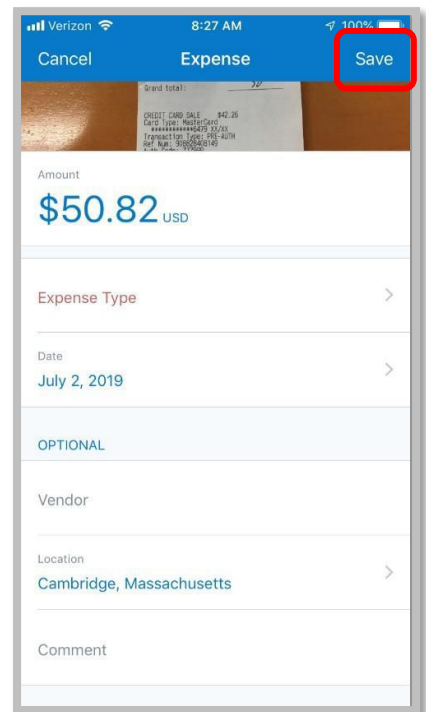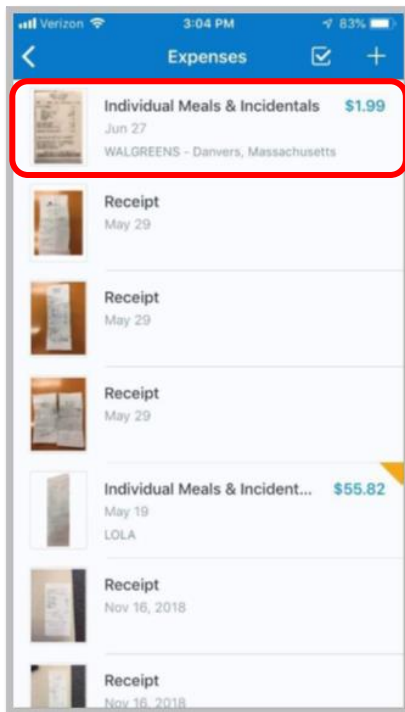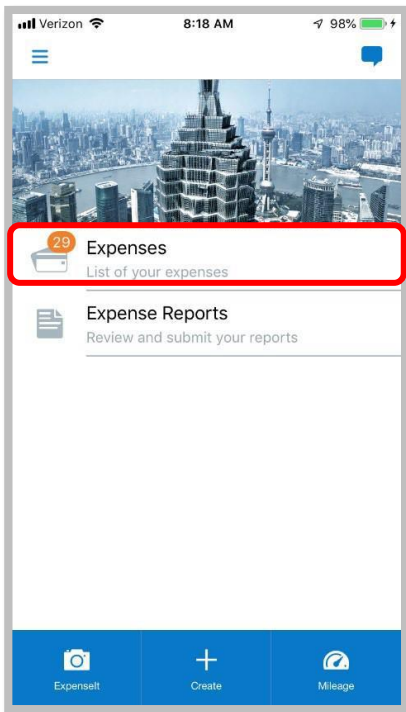
Deleting Expenses

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.

4. Click the **Delete** button
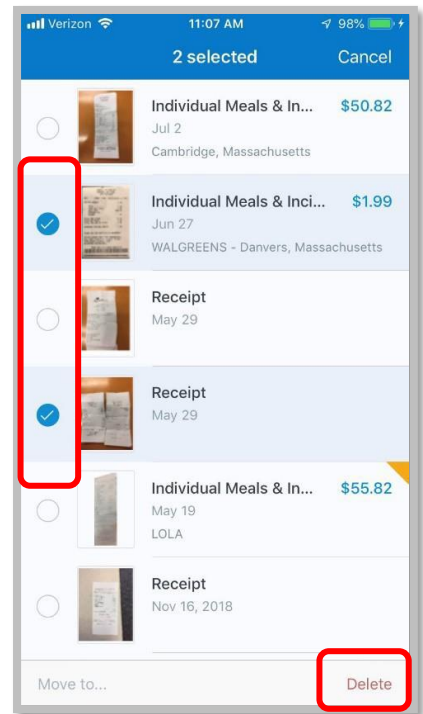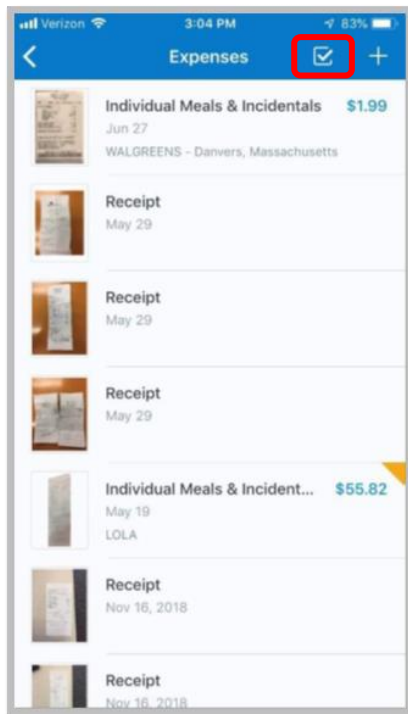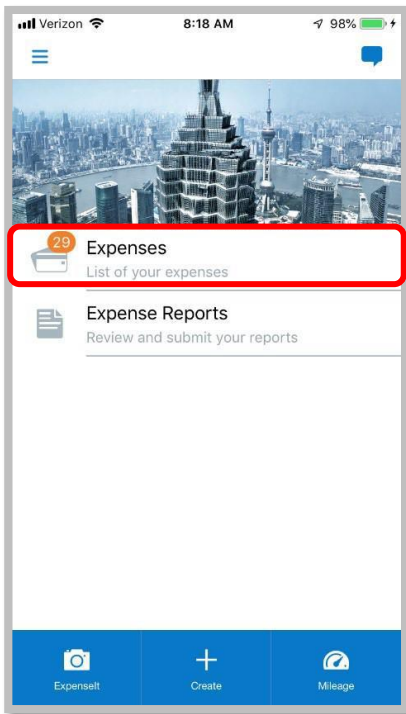
Creating a New Expense Report

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, the Policy and the Business Purpose (the Report Date defaults to the current date, but can be edited, if necessary)
- Include the dates of the trip and why the trip is business- related
- If you run out of space, use the Comment field

4. 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 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.
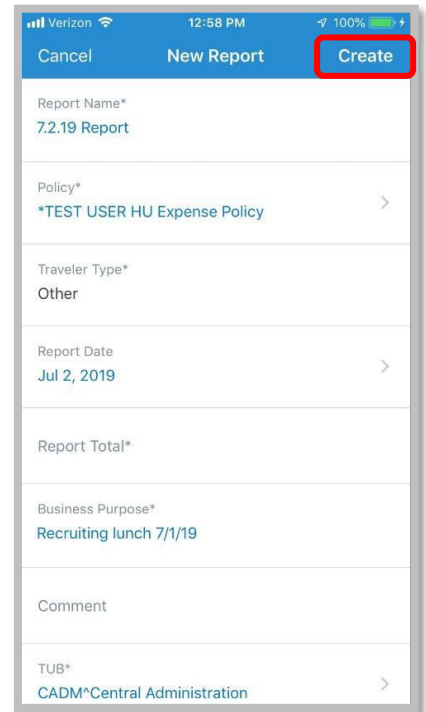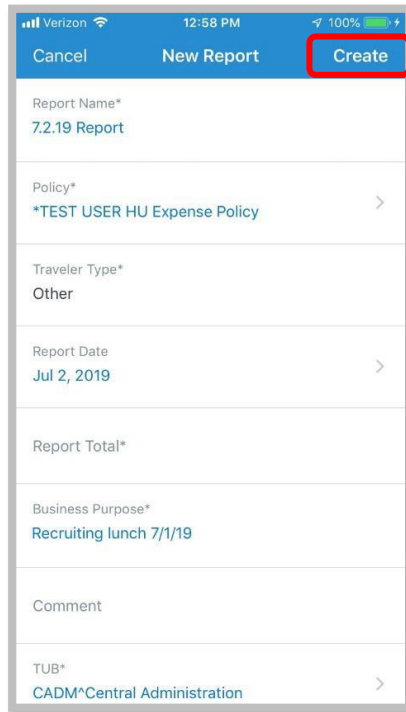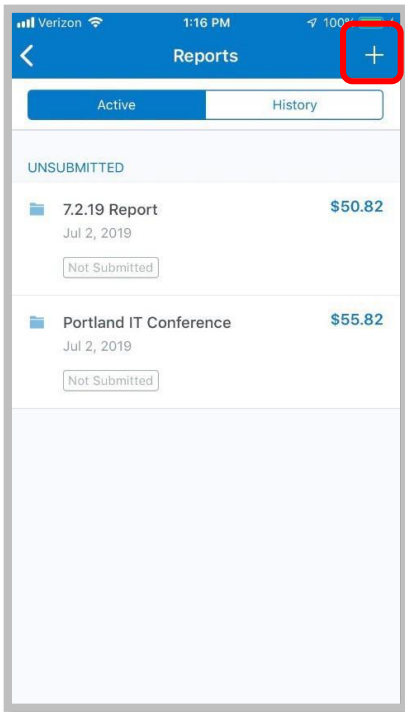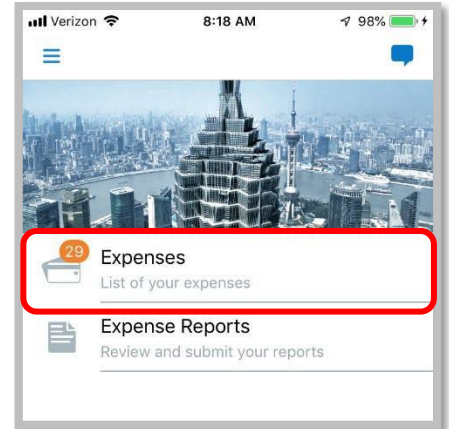
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When Adding an Expense to a Report

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**

or

- Tap Create New Report
- Enter all report information then tap **Create**. The report will be created, and the selected expenses are automatically added to the report.

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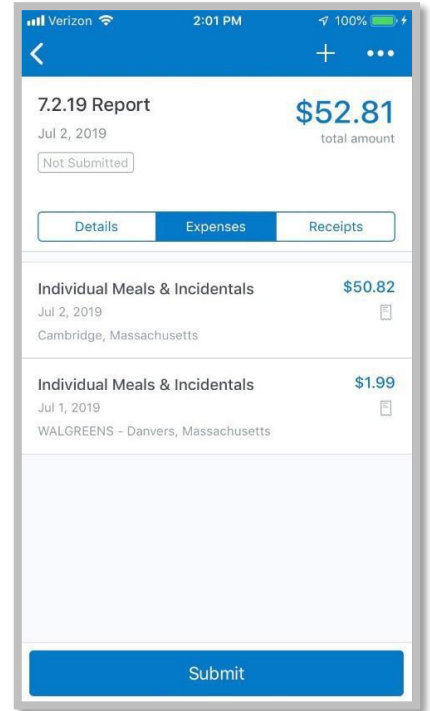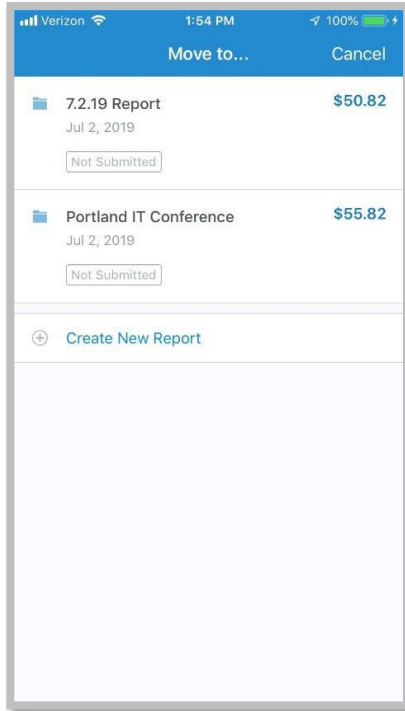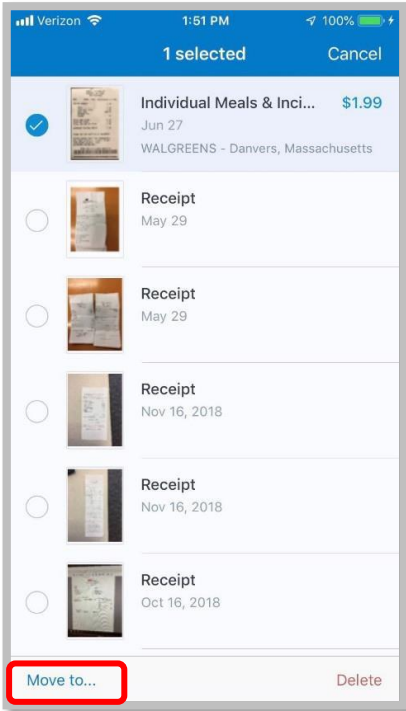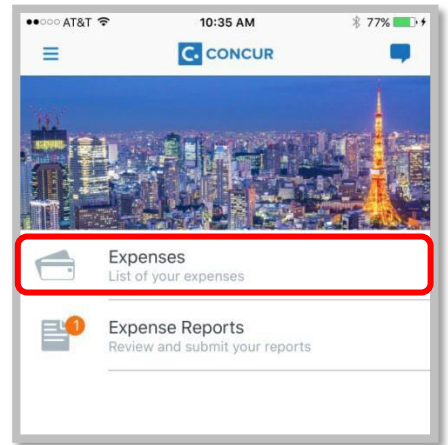
Adding Expenses to an Expense Report

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.
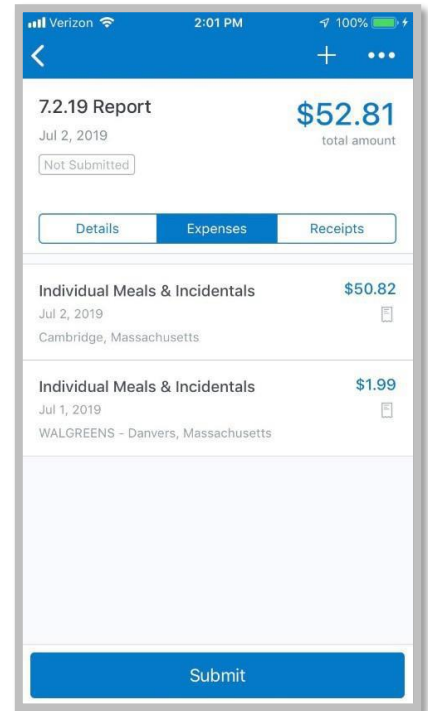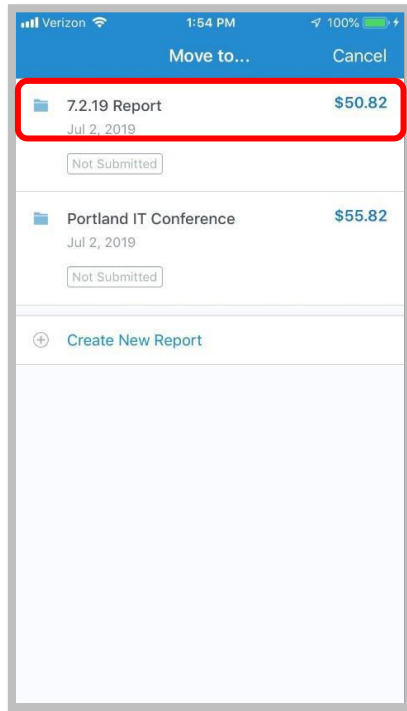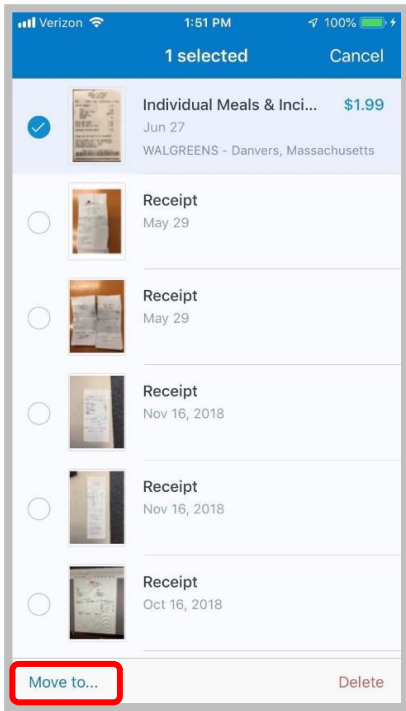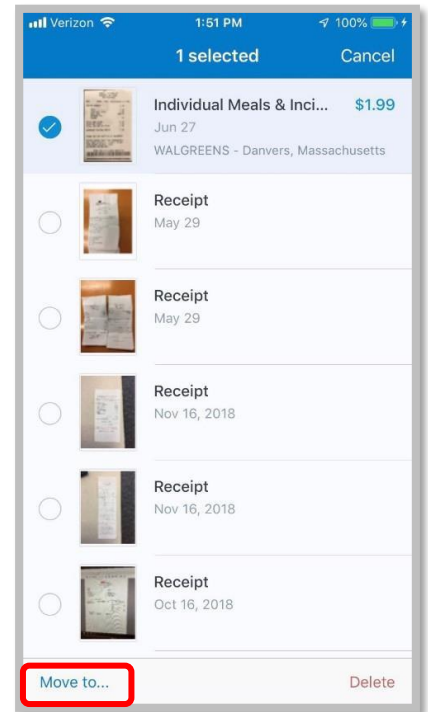
Editing Expenses on an Expense Report

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.

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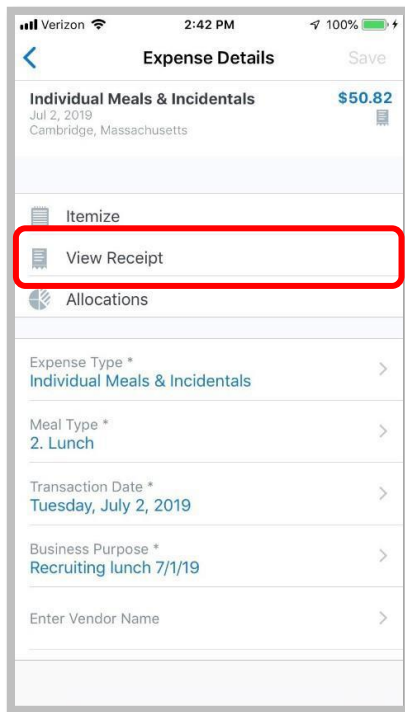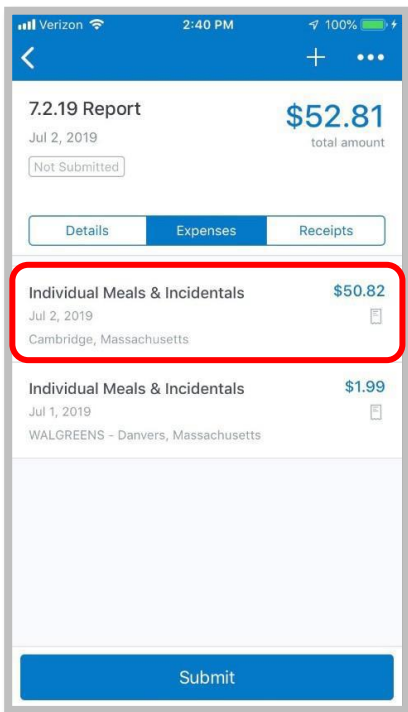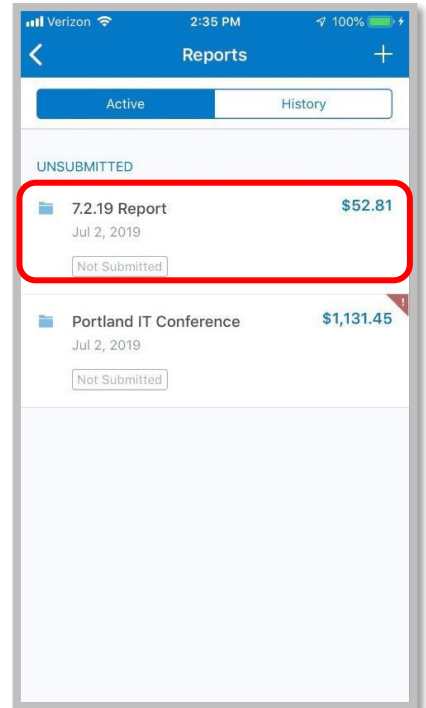
Itemizing Expenses

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.

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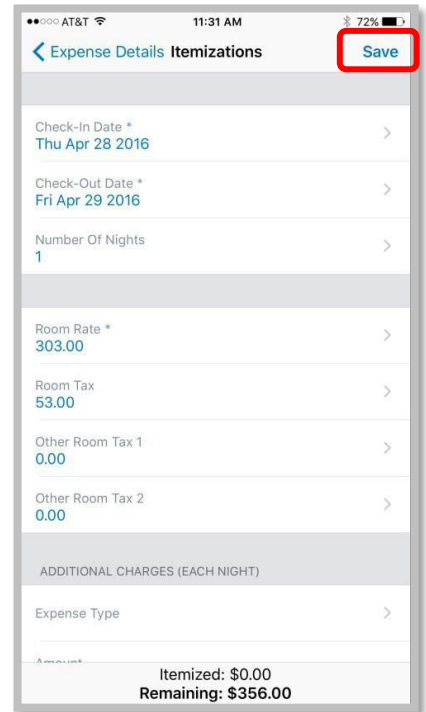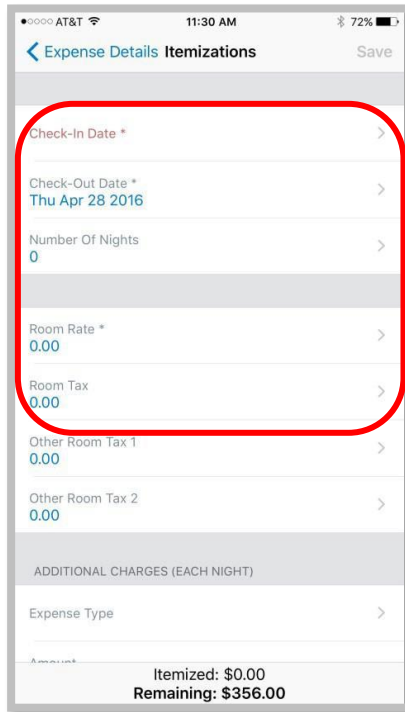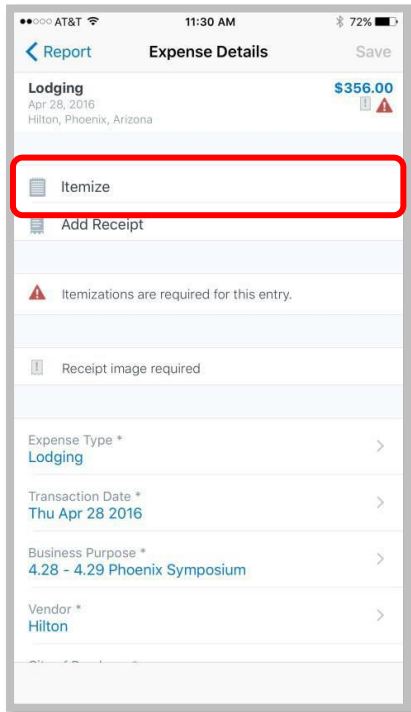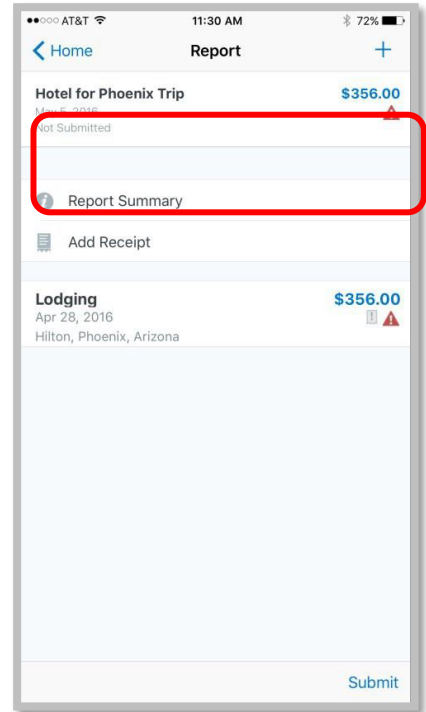
Adding Attendees

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 & First Name then tap Save.
- Search for Attendee
        a. On the Search for Attendee screen, select either Quick Search or Advanced Search.
        - Quick Search allows you to search the members of your Favorite Attendees list.
        - Advanced Search enables you to conduct a search of all University personnel.
        b. On the Attendee Search Results screen, tap Select Attendee to Add
        c. Select the desired attendee(s) from the list then tap Add Attendee.
7. Once all the attendees are added, click back arrow to return to Expense Details then tap Save.
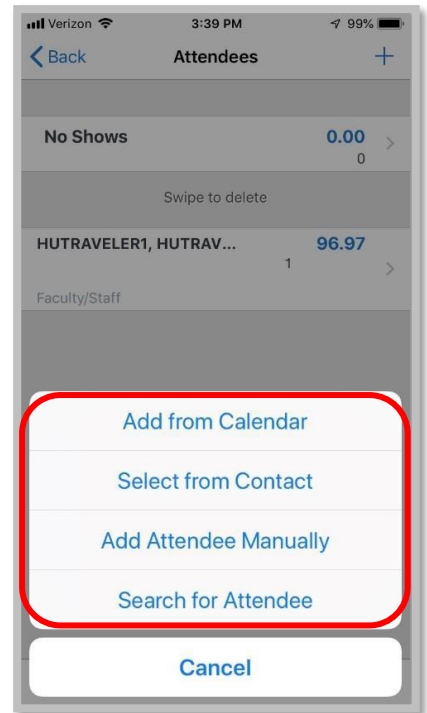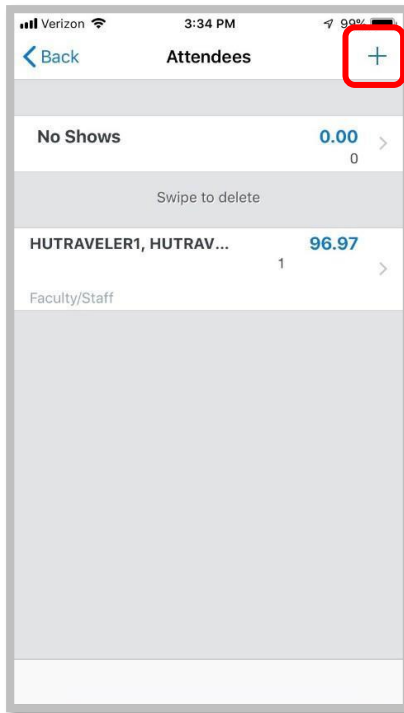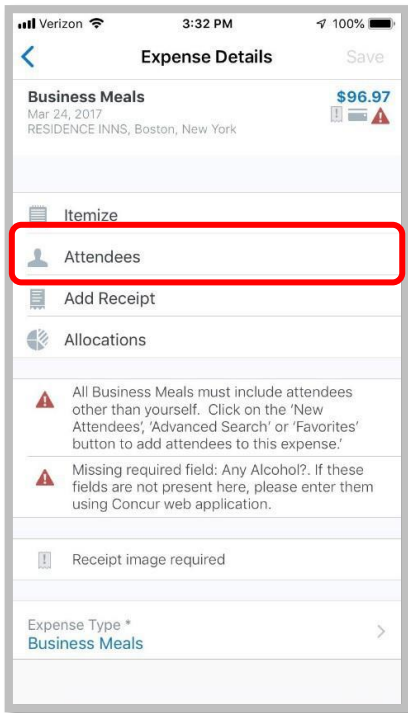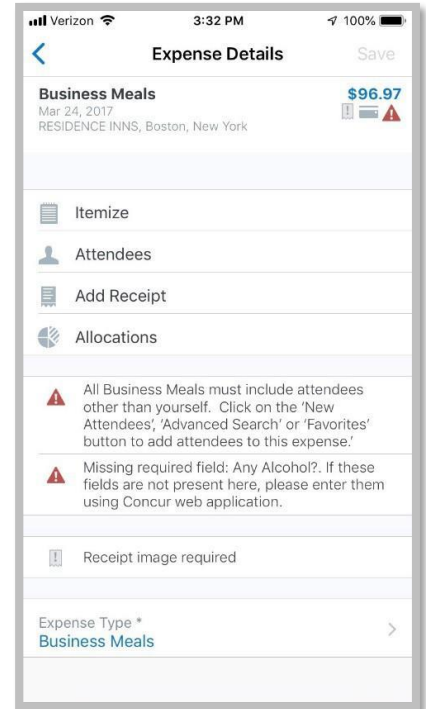
Submitting Expense Reports

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.