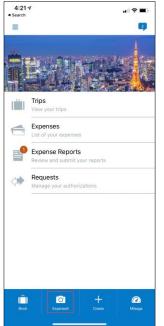
Columbia University Finance Training

Job Aid: Creating an Expense Report Using the Concur Mobile App

This job aid covers the steps for capturing a receipt, creating an Expense Item from the receipt, and adding the Expense to an Expense Report using the Concur mobile app. To install the Concur mobile app, refer to the <u>Setting Up and</u> <u>Installing Concur Mobile, TripIt, and ISOS Apps</u> job aid.

Capturing a Receipt and Creating an Expense Item

1. Open the **SAP Concur** app on your phone. Tap **Expenselt** at the bottom of the screen.



4. Tap **Next Receipt** if you have more receipts to capture, or **Done**.

2. Frame your receipt on the screen and tap the **Capture** button. Concur scans the receipt and amount.



Concur will analyze the receipt for relevent expense information. This may take a few minutes.

Expenses

Analyzing receipt..

Receipt

Receipt

Receipt

Receipt

Receipt

....

.88

.88

-Julia BC

3. Tap the amount indicated if correct or tap **Incorrect** to manually enter the correct amount.

| 1 | Confirm Amount |
|---|--------------------------------------|
| | |
| V | Vhat is the amount on this receipt ? |
| | 74.20 |
| | Incorrect |
| | · · · · · · |

5. The receipt is now available as an Expense item. Tap it to open and correct or update. You can also open it in the Concur desktop application.





COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK

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 Check to see if the Amount and Location fields have been correctly populated. Make any corrections, if needed, and enter any other required information. Tap Cancel, Save or Move To Report.

| 4:08 √ search | | al 🗢 🗖 |
|---------------------------------|------------------------|--------|
| Cancel | Expense | Save |
| | | |
| Armount \$74.20 | USD | |
| Expense Type Minor Equipmer | nt - Computers | > |
| ^{Date} May 29, 2021 | | > |
| OPTIONAL | | |
| Vendor Best Buy | | |
| Location New York, New | York | > |
| Comment | | |
| ID: c83438b6-f37 | '9-465f-8a46-9736c20c9 | 304b |
| | Move To Report | |
| | | |

Moving an Expense to an Expense Report

1. Open the Expense and tap Move to Report.

| 4:08 -7 Search | | all 🗢 🗔 |
|---------------------------------|---------------------|---------|
| Cancel | Expense | Save |
| | | |
| Armount \$74.20 t | JSD | |
| Expense Type Minor Equipment | - Computers | > |
| ^{Date} May 29, 2021 | | > |
| OPTIONAL | | |
| Vendor Best Buy | | |
| Location New York, New Yo | ork | > |
| Comment | | |
| ID: c83438b6-f379 | -465f-8a46-9736c20c | 904b |
| | Move To Report | |

2. You can either Move to an existing Not Submitted Report or Create New Report.



3. If you selected to add the Expense to a New Report, complete the required Report Details and **Save**.

| 4:16 🕫 | | all 🗢 🗖 |
|---|-------------------------------------|------------|
| Cancel | Report | Save |
| Admin Department FHR Human Res | | > |
| Report Name* 6.1.21 Report | | |
| Report Purpose* Meetings/Events | | > |
| Detailed Business I Connection cable | Purpose* e for laptop to make pr | esentation |
| Comment | | |
| GL BU* Columbia Univer | sity | > |
| Department* FHR Human Resources | | > |
| PC Business Unit* General Projects | | > |
| Project* GI Funding | | |
| Activity* GI Funding | | > |

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 You can tap the plus + to add a New Expense to the Report or tap Submit to submit the Report for approval.

| 4:18 🛪 | | al 🗢 🗖 |
|--|----------|--|
| < | Report | + ••• |
| another person, Profiled Payee r | | n behalf of CU Non- e the Act on |
| 6.1.21 Report Jun 1, 2021 Not Submitted | | \$74.20 total amount |
| Details | Expenses | Receipts |
| Minor Equipment - (May 29, 2021 Best Buy - New York, Ne | | \$74.20 [] |
| | Submit | |
| _ | | - |

Note: *The Concur mobile App is intended for the Payee only and does not support Delegation. Delegates must use the Concur desktop application.*

Getting Help

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now https://columbia.service-now.com