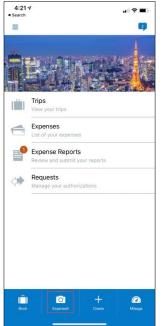
Columbia University Finance Training

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.





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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