



BUREAU OF THE
Fiscal Service
U.S. DEPARTMENT OF THE TREASURY



ConcurGov Mobile A New Frontier

Brian Shears

Zach Bosley

May 10-11, 2017



Welcome to ConcurGov Mobile

Key Points we will be covering today:

- What ConcurGov Mobile can do
- What ConcurGov Mobile cannot do
- Functional capabilities that will be available
- Deployment and customer responsibilities
- ARC Travel Help Desk responsibilities
- Overview of functionality within ConcurGov Mobile
- Reminders
- Steps to implement Mobile
- Questions



Please keep in mind...

ConcurGov Mobile is a supplemental tool designed for limited functionality for Federal travelers on the go. It is not designed to replicate the full functionality of the ConcurGov desktop version.



ConcurGov Mobile – What it can do

Functions that can be performed in ConcurGov Mobile

- Review/Sign documents (Authorization, Voucher, Local Voucher, Adjustments)
- Create adjustments to documents
- Create voucher from authorizations
- Attach receipts via device camera
- Review/Approve documents (Reviewing and Approving Officials only)



ConcurGov Mobile – What it cannot do

Functions that cannot be performed in ConcurGov Mobile



- Cannot book or edit reservations
- Cannot claim meals provided, leave, or actual expense for lodging expenses
- Cannot modify travel dates and per diem locations in a voucher
- Does not allow the traveler to apply extra funds to their charge card
- Don't attempt to allocate accounting (do it in desk version)
- *No dynamic accounting capability

*Note: While users do not have the capability of using dynamic accounting, Mobile does allow for the selection of static accounting, such as a default, or if a user has “Favorite” accountings saved.

ConcurGov Mobile - Functional

ARC Travel Service customers will have the capability of

- Signing authorizations and vouchers to initiate routing
- Creating vouchers from authorizations
- Attaching receipts
- Making changes to authorizations and vouchers
- Approving and reviewing documents (Approving Officials)



ConcurGov Mobile - Deployment

ConcurGov Mobile will be available on June 1, 2017. Your agency can implement anytime after that date.

- Agencies have unique regulations. Include your Agency Management, IT, and Security to create a plan and ensure proper protocols are followed. ARC Travel will provide marketing/change management materials to travel contacts upon request.
- **Very Important** - It is your responsibility at your agency to seek approval from your IT Security office prior to announcing or sending out any communication on using the mobile app. All agencies have unique policies regarding downloading apps and/or the use of personal devices for official Government business.
- Once approved, the ConcurGov Mobile App can be downloaded to a device (IOS or Android) via the App store or your agency may choose to push from their own internal app store.
- Once the app is downloaded, users will be able to access mobile using their ConcurGov User ID and Password.

ConcurGov Mobile – Travel Support Desk

ARC Travel Customer Service Help Desk will be available to assist mobile users with navigational assistance only within ConcurGov Mobile (IOS and Android). ARC will also offer and provide webinar training on Mobile upon request.

Please remember that our Help Desk cannot assist callers with downloading the app or troubleshooting operating system issues. These callers will be referred to their IT Help Desk.



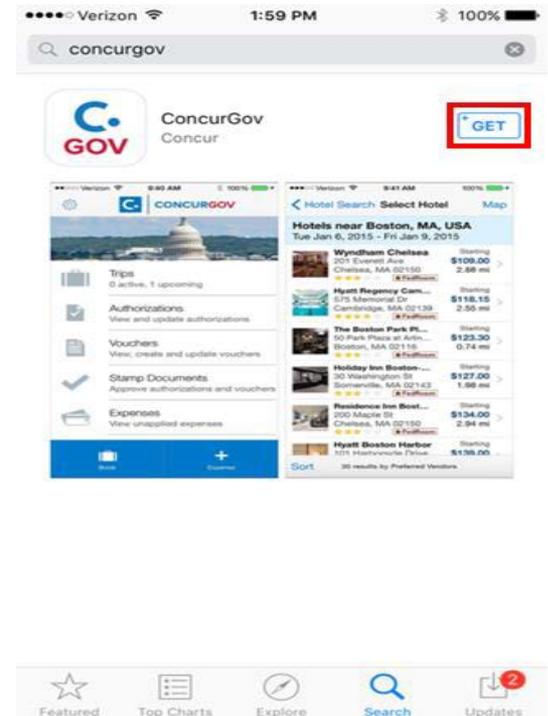
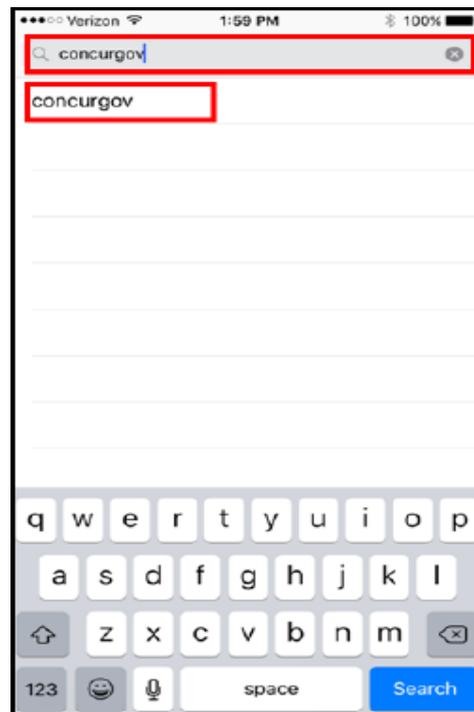
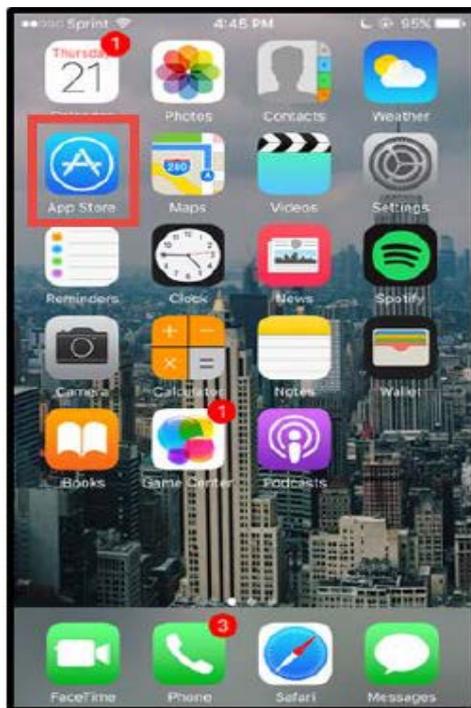
Installing ConcurGov Mobile



Installing the App

To download and install the ConcurGov mobile app:

1. On the Home screen of your device, tap the **App Store** icon.
2. On the App Store screen, tap the **Search** icon.
3. In the **Search** field, type **ConcurGov** and then tap to select the **ConcurGov** app.
4. Tap the **Get** button.



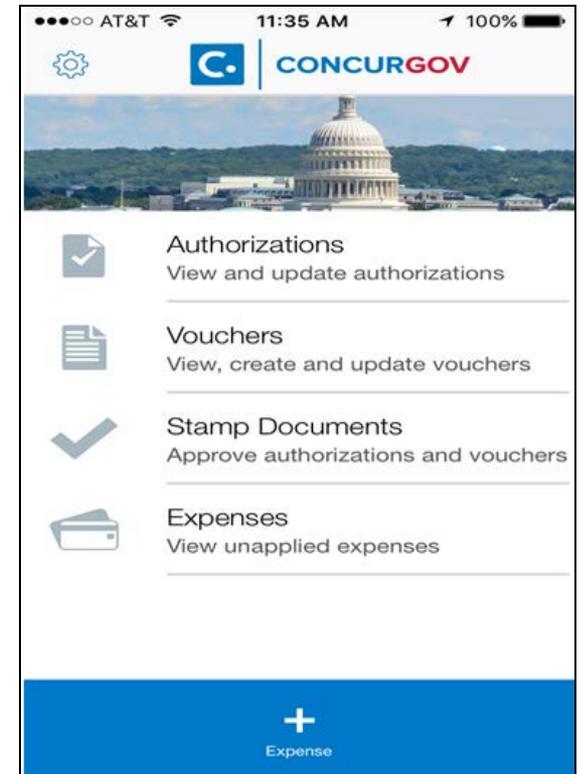
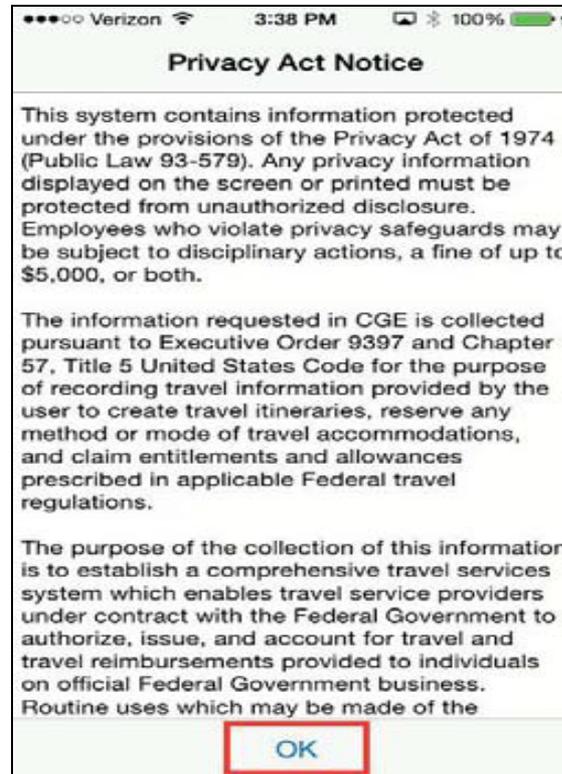
Logging into ConcurGov Mobile



Logging into ConcurGov Mobile

To access ConcurGov mobile:

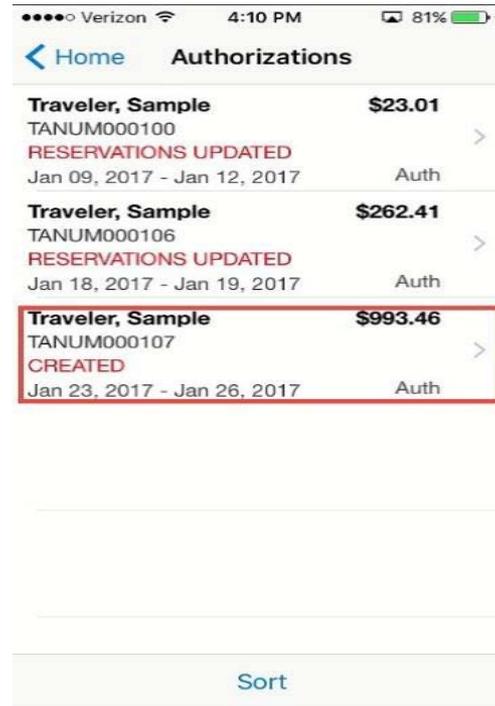
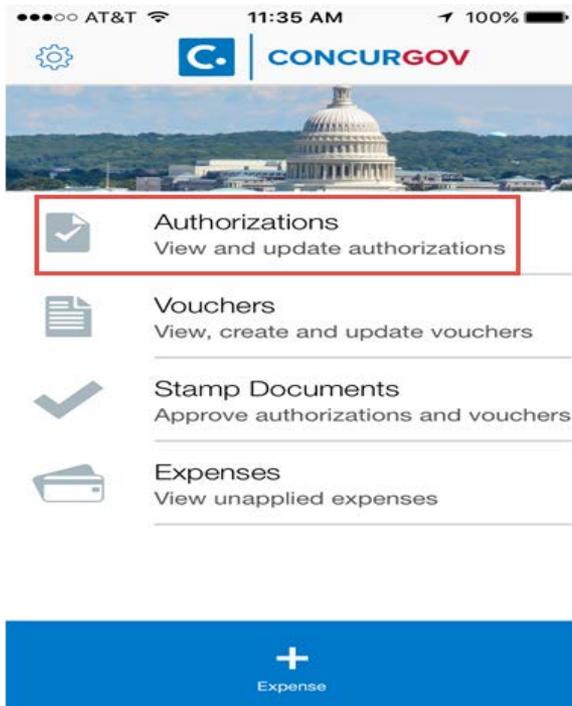
1. Tap the ConcurGov app icon. 
2. Enter **Username** and **Password** and then tap **Sign in to Concur**.
3. Tap the **Ok** button at the Privacy Act Notice, and the home page will appear.



Signing an Authorization

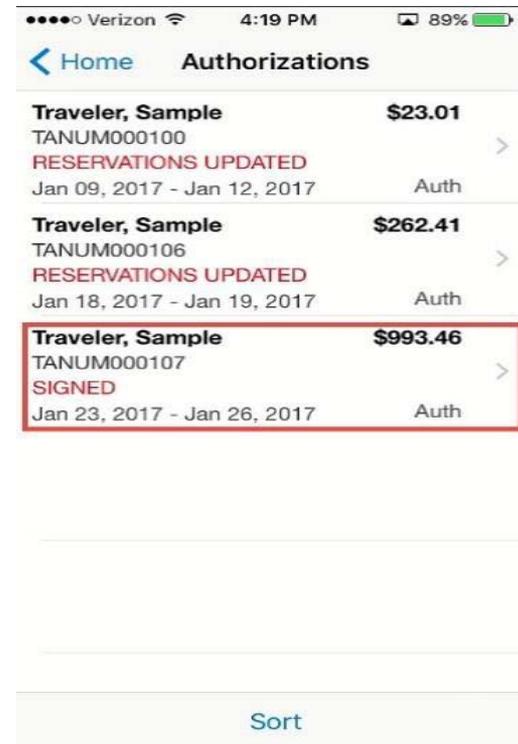
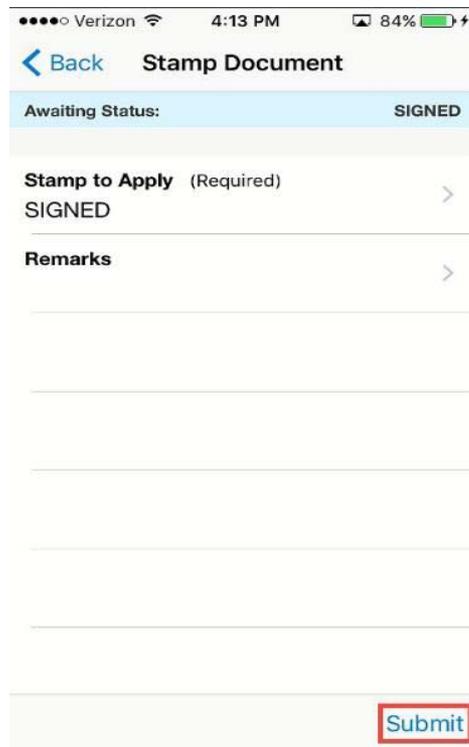
To stamp an authorization SIGNED using the ConcurGov mobile app:

1. On the Home screen, tap the **Authorizations** tab.
2. On the Authorizations screen, select an authorization.
3. On the Authorization screen, tap the **Stamp** button.



Signing an Authorization continued

4. On the Stamp Document screen, tap the **Submit** button.
5. The updated document status displays on the Authorizations screen.



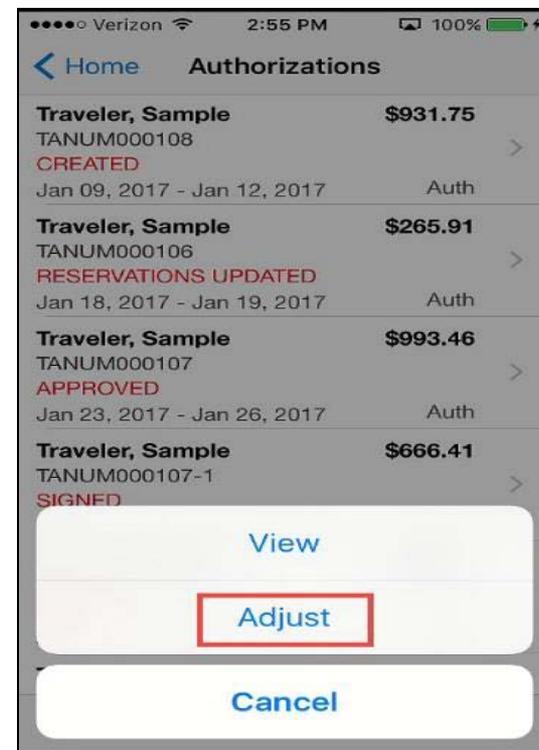
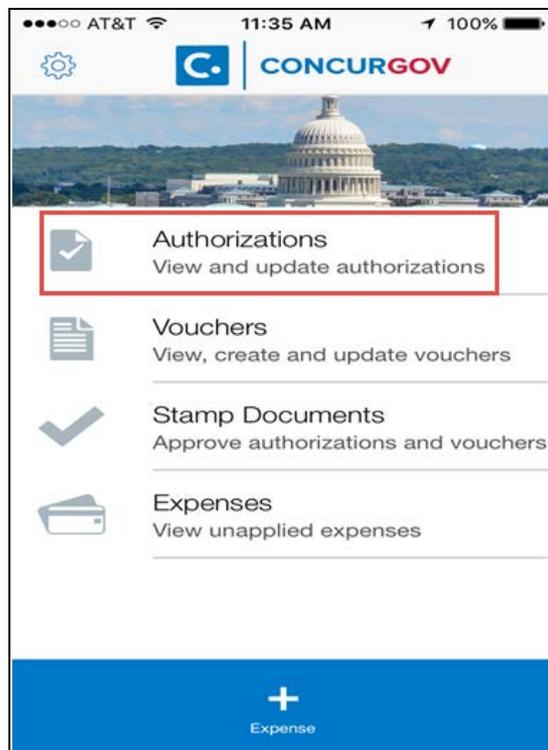
Adjustments to Documents



Adjusting an Authorization

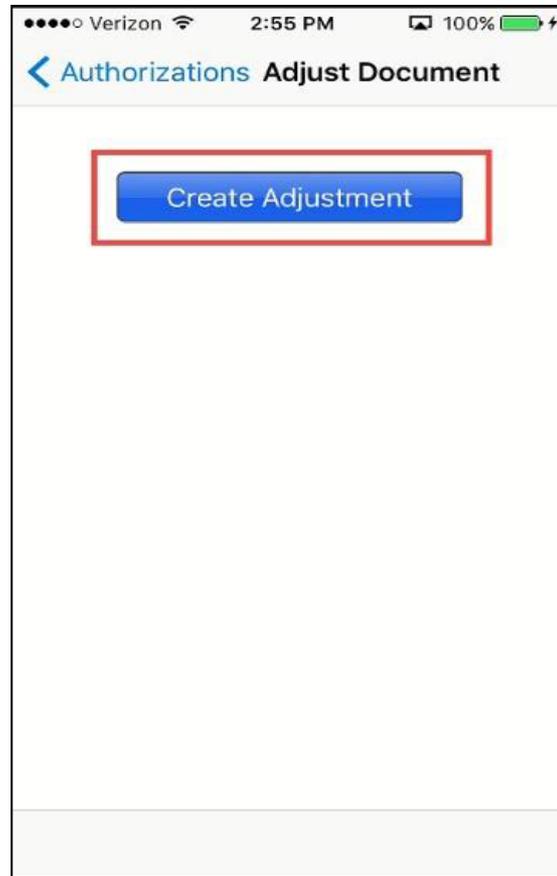
To change (adjust) a stamped authorization using the ConcurGov mobile app:

1. On the Home screen, tap the **Authorizations** tab.
2. On the Authorizations screen, select the authorization to be adjusted.
3. On the pop-up menu, tap **Adjust**.



Adjusting an Authorization continued

4. On the Adjust Document screen, tap the **Create Adjustment** button. The authorization is now ready to be adjusted.



Adjusting an Authorization continued

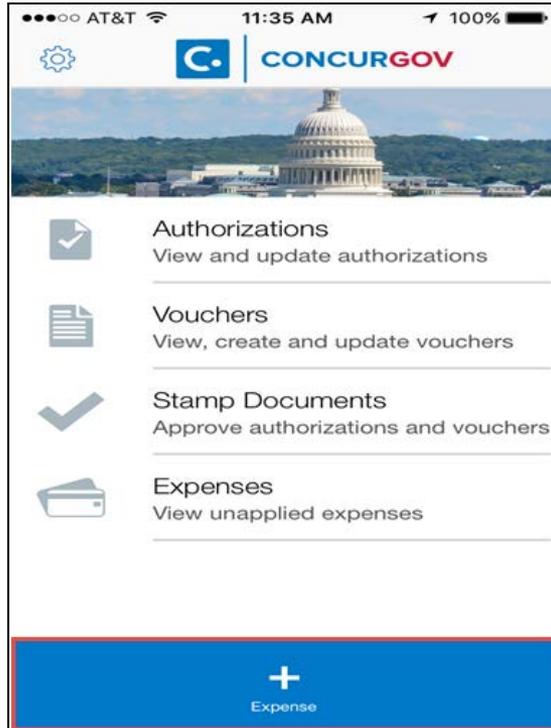
5. Document will be in an edit state so that changes can be made. To make changes scroll (swipe screen upwards) to advance screen to the section(s) that need updated. Select the sections and make changes.



Quick Expenses

WHAT IS A QUICK EXPENSE?

A **quick expense** is simply an expense that you can record to your mobile device right when you incur it while on travel!

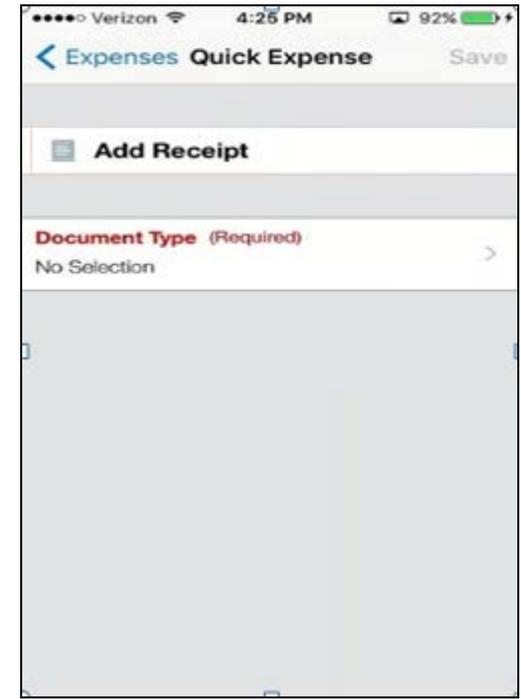
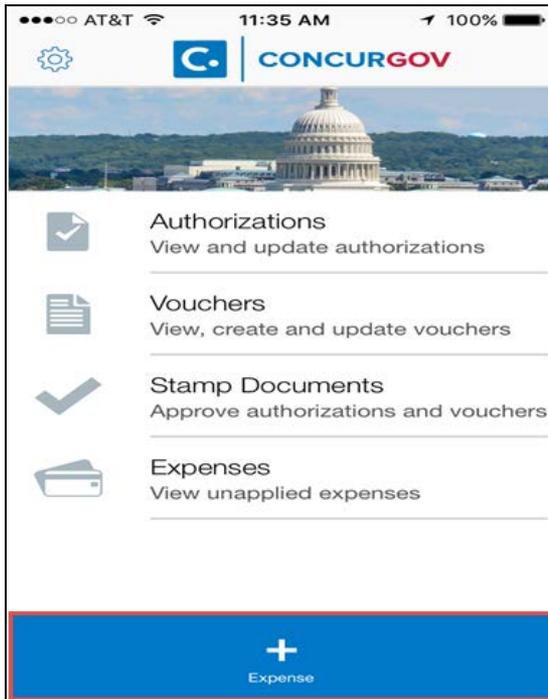


Creating a Quick Expense

Quick Expense allows users to record expenses and receipts while on the go.

1. On the Home screen, tap the Expense button in the bottom navigation bar.
2. Tap the **plus (+)** button in the top navigation bar.

(Add Receipt - recommend only adding receipts on Summary page).



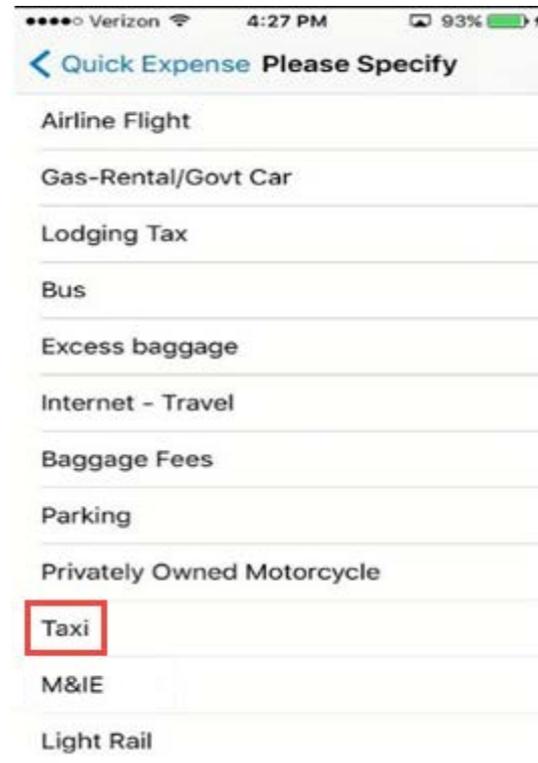
Creating a Quick Expense continued

3. Tap **Document Type**.
4. Tap **VCH From Auth**.



Creating a Quick Expense continued

5. On the Quick Expense screen, tap the **Expense Description** tab.
6. Select the appropriate expense description from the list.



Creating a Quick Expense

continued

7. On the Quick Expense screen, tap the **Cost** tab.
8. On the Cost screen, type in the cost and tap **Quick Expense**.
9. On the Quick Expense screen, tap the **Save** button.

Verizon 4:28 PM 93%

< Expenses Quick Expense Save

View Receipt

Document Type (Required)
Auth >

Expense Description (Required)
Taxi >

Expense Date (Required)
Thu Jan 19, 2017 >

Create Expenses Through Date >

Cost (Required)
No Selection >

Expense Category
M&IE-PerDiem

Verizon 4:29 PM 93%

< Quick Expense Cost

50.00

This field requires a numeric value.

1 2 3
ABC DEF

4 5 6
GHI JKL MNO

7 8 9
PQRS TUV WXYZ

- . 0 < X

Verizon 4:29 PM 93%

< Expenses Quick Expense Save

View Receipt

Document Type (Required)
Auth >

Expense Description (Required)
Taxi >

Expense Date (Required)
Thu Jan 19, 2017 >

Create Expenses Through Date >

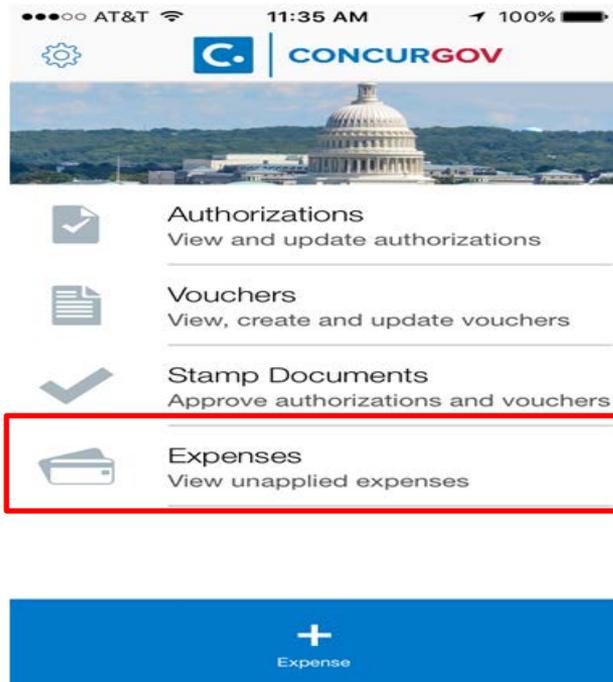
Cost (Required)
50.00 >

Expense Category
M&IE-PerDiem

Creating a Quick Expense continued

Quick Tip!

You can view your list of saved **Quick Expenses** anytime by tapping on the **Expense** button from main menu screen on your device. Quick Expenses are exclusive to mobile and cannot be accessed/viewed in desktop.



< Home	Expenses	+
Taxi	\$50.00	>
Apr 07, 2017	Tap to edit	
Rental Car	\$230.00	>
Mar 30, 2017	Tap to edit	
Taxes	\$23.00	>
Mar 30, 2017	Tap to edit	
Rental Car	\$250.00	>
Mar 28, 2017	Tap to edit	
Taxi	\$25.00	>
Mar 28, 2017	Tap to edit	
POV	\$27.00	>
Feb 19, 2017	Tap to edit	
Rental Car	\$500.00	>
Feb 16, 2017	Tap to edit	
Sort By		

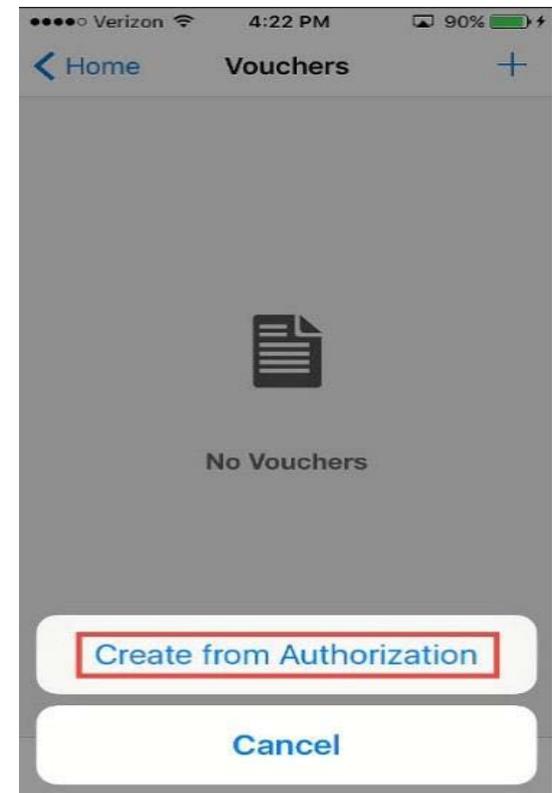
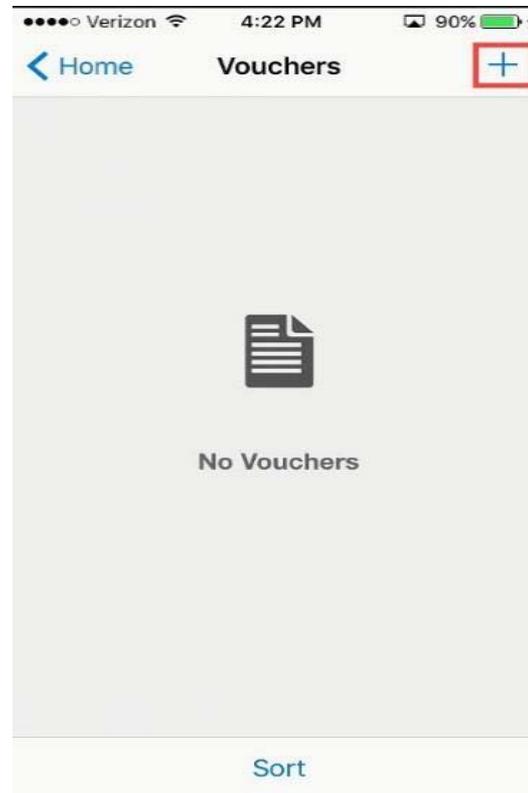
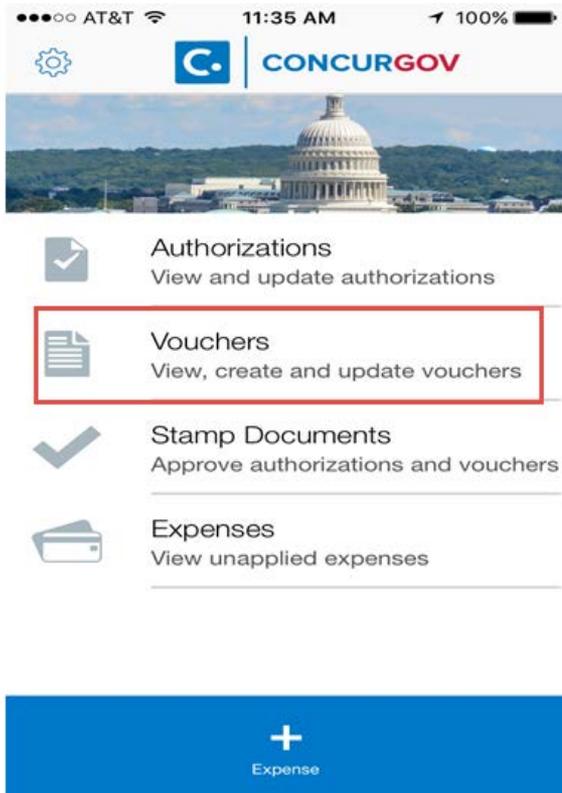
Voucher from an Authorization



Creating a Voucher from Authorization

To create a voucher using the ConcurGov mobile app:

1. On the Home screen, tap the Vouchers tab.
2. On the Vouchers screen, tap the **plus (+)** button in the top navigation bar.
3. On the pop-up menu, tap **Create from Authorization**.



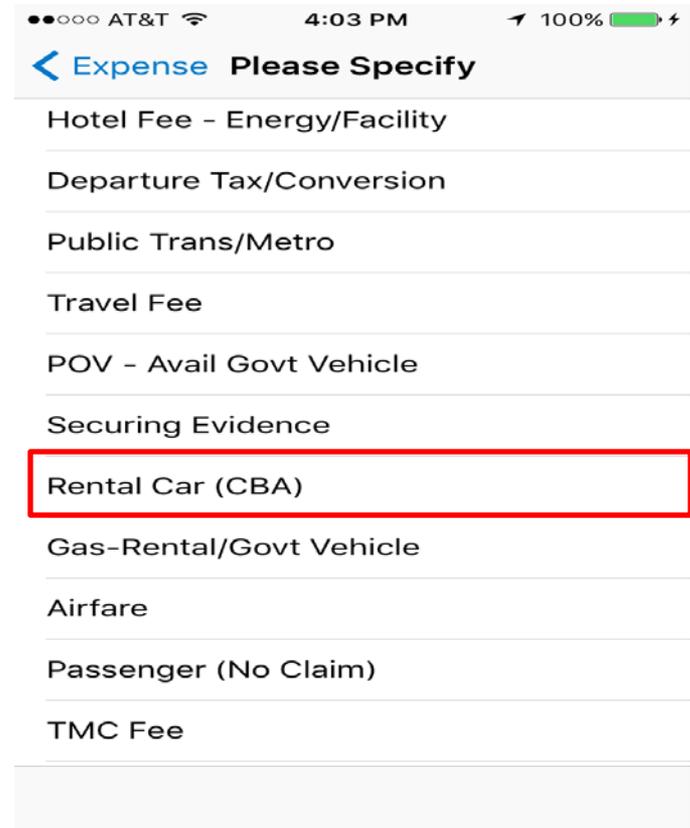
Creating a Voucher from Authorization continued

4. On the Select Authorization screen, select the authorization you want to use for the voucher (only approved authorizations will be visible).
5. The voucher is created and is ready to be updated.



Creating a Voucher from Authorization continued

5. Scroll down and tap the **Expenses** button.
6. Tap the expense to be added or updated.



Creating a Voucher from Authorization continued

7. Tap the **Cost** button.
8. Update the amount to reflect your actual expense.
9. Tap **Save**.

AT&T 2:19 PM 96%

< Expenses Expense Save

Add Receipt

Expense Description (Required)
Rental Car >

Expense Date (Required)
Sun Feb 19, 2017 >

Create Expenses Through Date >

Cost (Required) >

Expense Category
Rental Car

Payment Method (Required)
IBA >

AT&T 2:19 PM 97%

< Expenses Expense Save

Add Receipt

Expense Description (Required)
Rental Car >

Expense Date (Required)
Sun Feb 19, 2017 >

Create Expenses Through Date >
Fri Dec 16, 2016

Cost (Required)
150.50 >

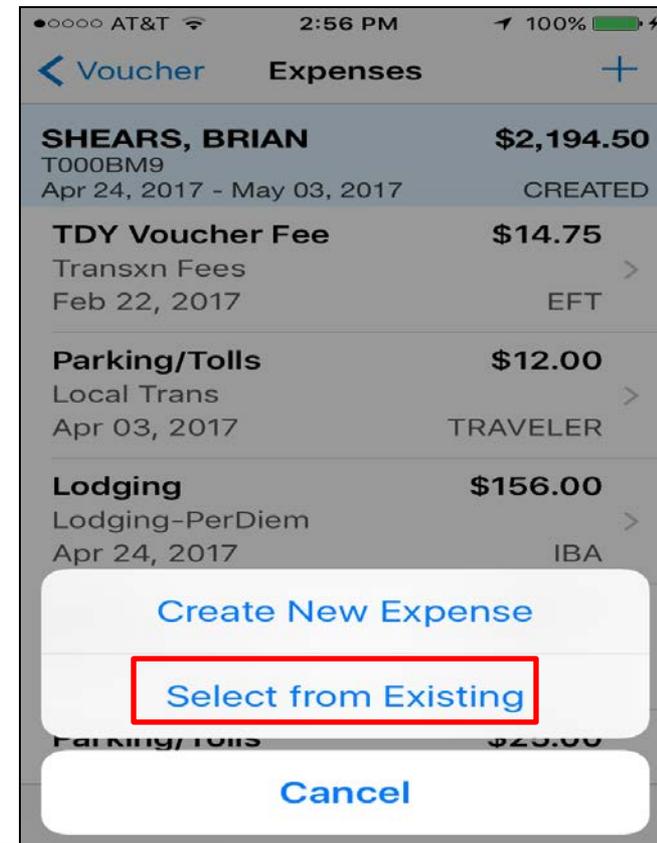
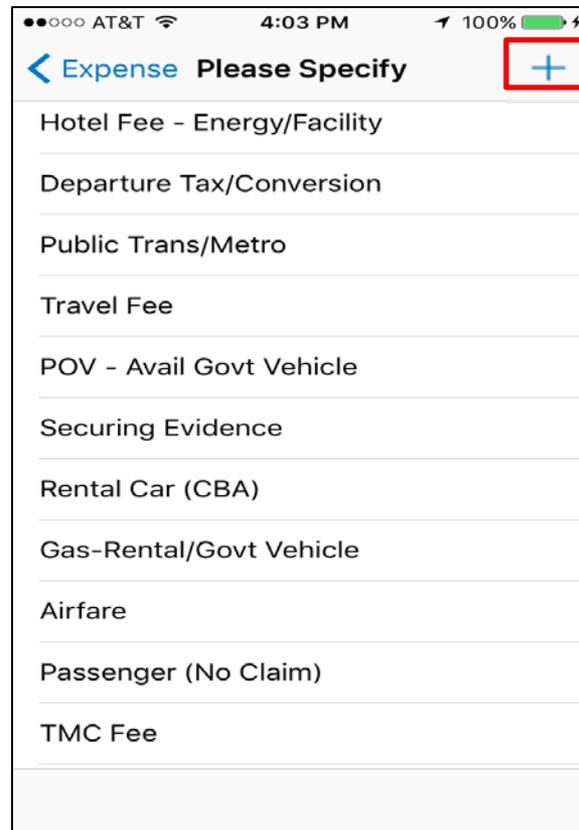
Expense Category
Rental Car

Payment Method (Required)
IBA >

Creating a Voucher from Authorization continued

Importing Quick Expenses into your voucher

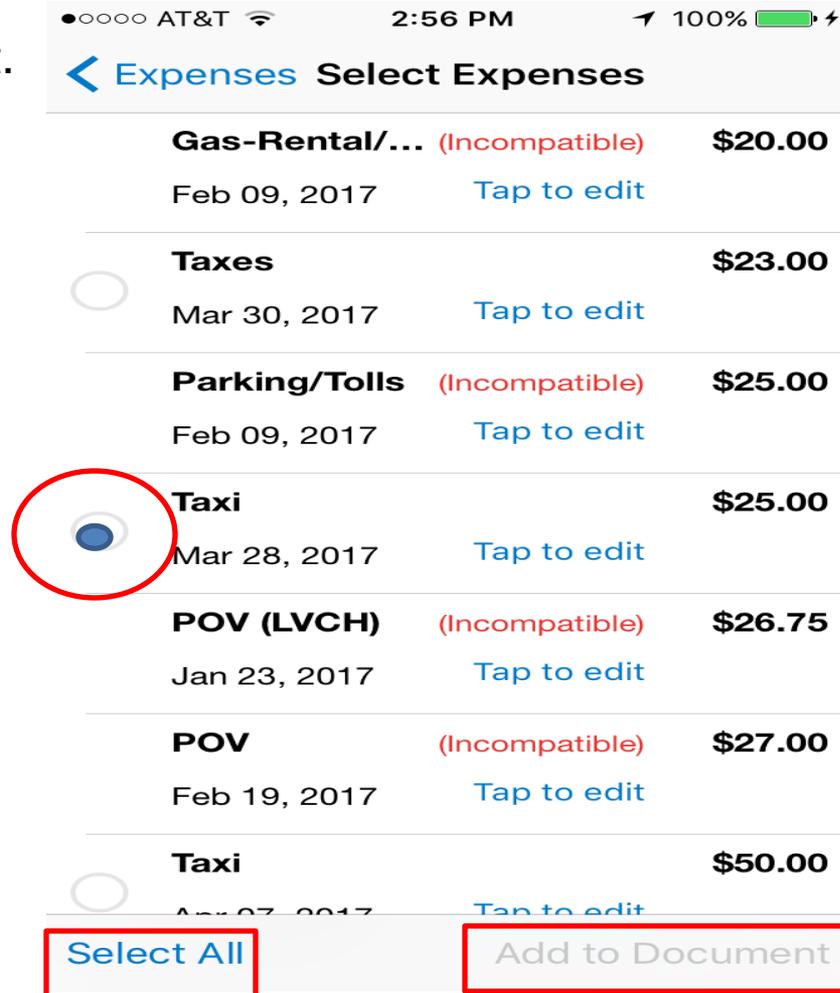
1. Tap on **Expenses**.
2. Tap the + symbol.
3. Tap **Select from Existing**.



Creating a Voucher from Authorization continued

Importing Quick Expenses

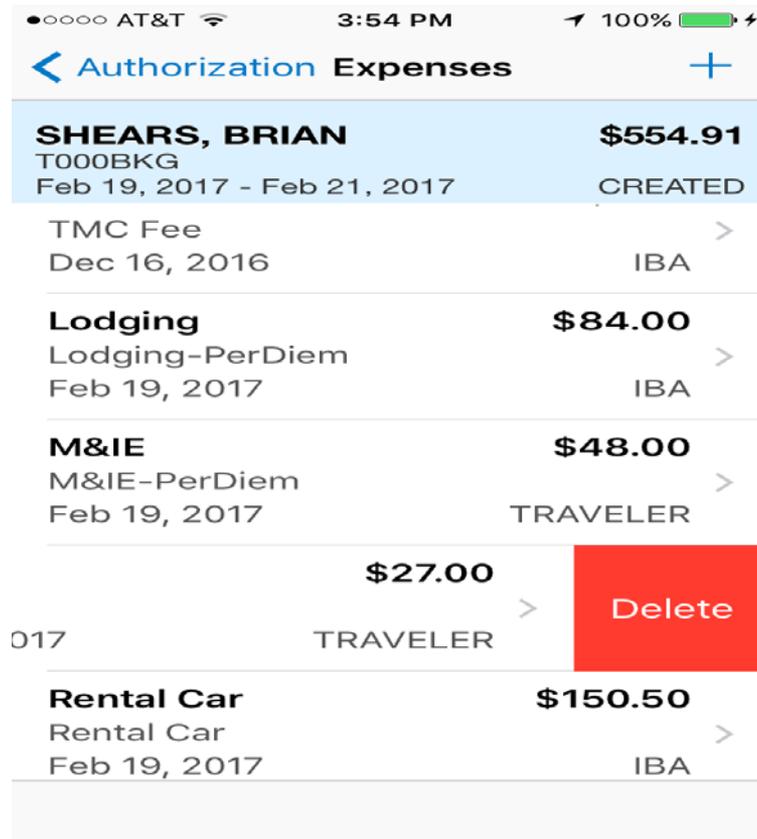
4. Select the expense(s) to import.
5. Select **Add to Document** or
6. Tap **Select All** if applicable.



Creating a Voucher from Authorization continued

To delete an expense

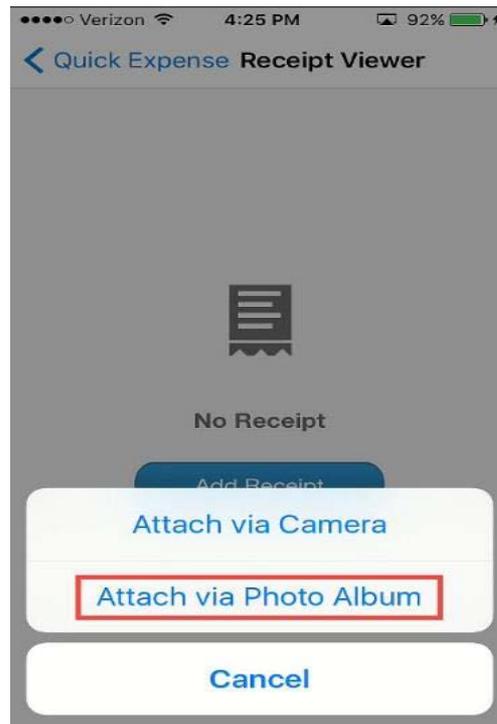
1. 'Left swipe' on the expense to be deleted.
2. Tap the red **Delete** button.



Creating a Voucher from Authorization continued

Attach receipts by either by taking an instant picture or upload via your photo album.

1. On the Voucher home page tap on **Add/View Receipt**.
2. Select **Attach via Camera** or **Attach via Photo Album**.
3. Tap **Done**.



Creating a Voucher from Authorization continued

Signing the Voucher for processing

1. On the Voucher home page tap **Stamp** button.
2. Verify the default stamp to apply is **Signed** and tap **Submit**.



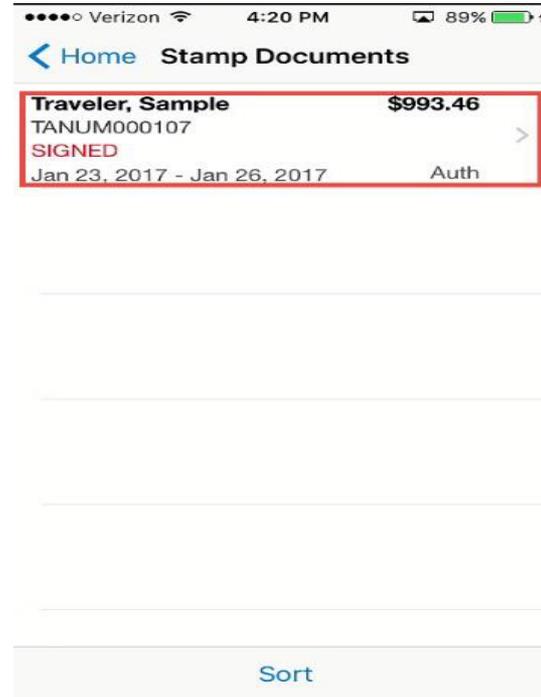
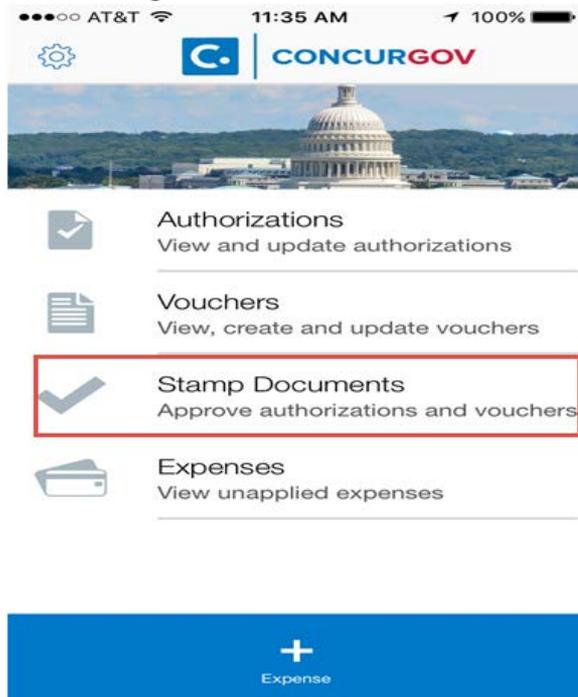
Reviewing or Approving Documents



Approving Documents

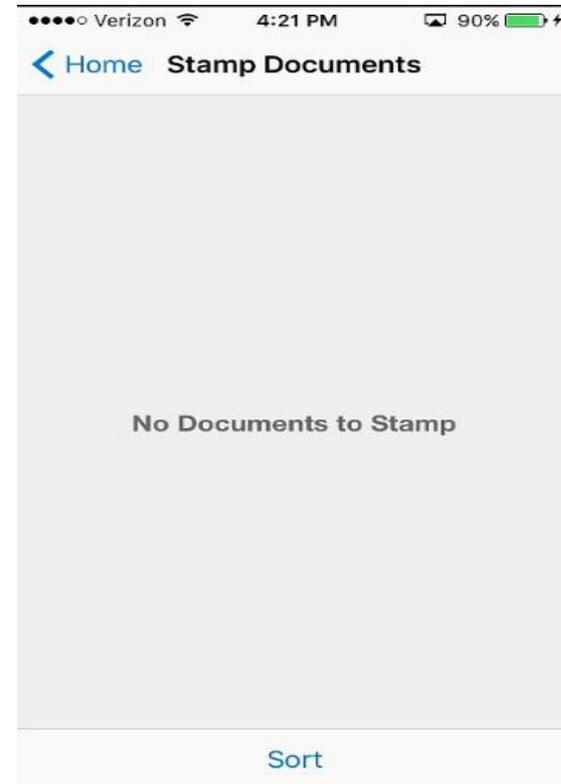
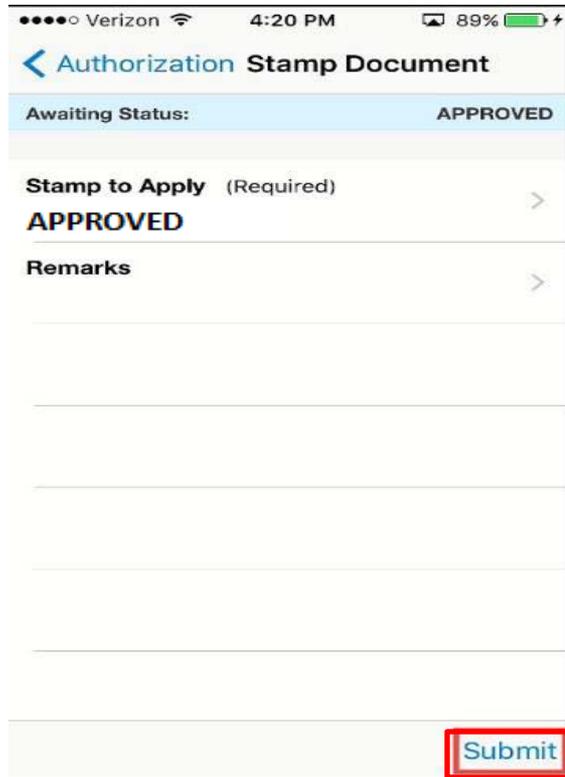
To approve an Authorization using the ConcurGov Mobile App:

1. On the Main Menu screen, tap the **Stamp Documents** tab.
2. At the Stamp Documents screen, select an authorization.
3. Be sure to review document expenses, accounting, receipts, and justifications.
4. On the Authorization Details screen, tap the **Stamp** button in the bottom navigation bar.



Approving Documents continued

5. On the Stamp Document screen, tap **Submit**
6. The authorization is routed to the next approver level. It is no longer visible in the Stamp Documents screen.



Reminder ...

ConcurGov Mobile Users **cannot**

- Amend an authorization or voucher
- Book, change, or modify a reservation
- Modify the per diem location or travel dates in voucher
- Access other travelers' accounts (Document Preparers)
- Add multiple receipts at one time



Steps to implement Mobile



- Work with your security office regarding the use of mobile and apps for personal and/or work devices.
- Work with Travel Services to develop a communication plan.
- Work with Travel Services to share your rollout plans and discuss training needs.
- Recommend you pilot a small group of users first before rolling out to the entire organization.

Travel Services began a ConcurGov Mobile pilot with the Farm Credit Administration on April 3, 2017

- Pilot consisted of approximately 25 frequent travelers and five approving officials.
- Pilot has gone very well. Positive feedback received from participants.
- Travel Services has received a minimal number number of calls on mobile.
- FCA mobile pilot project managers are here today if anyone has questions for them.

Questions - Open Discussion



Contact Information

Visit us at our Network Hall for more information.

**THANK YOU
FROM TRAVEL SERVICES**

For questions or more information, please contact Travel Services Help Desk - (304) 480-8000, option 1, or send an email to travel@fiscal.treasury.gov.

Travel Services Help Desk hours are 7:00 a.m. to 6:00 p.m. EST.