



ConcurGov Mobile A New Frontier

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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





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

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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)

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ConcurGov Mobile – What it cannot do

Functions that <u>cannot</u> 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)



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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.
- <u>Very Important</u> 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.

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 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.





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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.

Back to App Store 2:00 PM \$ 100% Sign In	Privacy Act Notice	•••••• AT&T ← 11:35 AM → 100% ■
	This system contains information protected under the provisions of the Privacy Act of 1974 (Public Law 93-579). Any privacy information displayed on the screen or printed must be protected from unauthorized disclosure	
Username	Employees who violate privacy safeguards may be subject to disciplinary actions, a fine of up to \$5,000, or both.	Authorizations View and update authorizations
Password or PIN	The information requested in CGE is collected pursuant to Executive Order 9397 and Chapter 57, Title 5 United States Code for the purpose of recording travel information provided by the	Vouchers View, create and update vouchers
Sign In to Concur	method or mode of travel information provided by the user to create travel itineraries, reserve any method or mode of travel accommodations, and claim entitlements and allowances prescribed in applicable Federal travel	Stamp Documents Approve authorizations and voucher
	regulations.	Expenses
Warning This is a U.S. Federal Government information system that is "FOR OFFICIAL USE ONLY." [More	The purpose of the collection of this information is to establish a comprehensive travel services system which enables travel service providers under contract with the Federal Government to authorize, issue, and account for travel and travel reimbursements provided to individuals	View unapplied expenses
Privacy Act Notice	on official Federal Government business. Routine uses which may be made of the	
This system contains information protected under the provisions of the Privacy Act of 1974 (Public Law 93[More	OK	Expense





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.













Expense

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.



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Kerne Authorizatio	ons
Traveler, Sample TANUM000108 CREATED	\$931.75
Jan 09, 2017 - Jan 12, 2017	Auth
Traveler, Sample TANUM000106 RESERVATIONS LIPDATED	\$265.91
Jan 18, 2017 - Jan 19, 2017	Auth
Traveler, Sample TANUM000107 APPROVED	\$993.46
Jan 23, 2017 - Jan 26, 2017	Auth
Traveler, Sample TANUM000107-1 SIGNED	\$666.41
Jan 23, 2017 - Jan 26, 2017	Auth
Traveler, Sample TANUM000112 SIGNED	\$1,008.27
Jan 23, 2017 - Jan 26, 2017	Auth
Traveler, Sample	\$510.01
Sort	





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!











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).





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continued

Tap Document Type. Tap VCH From Auth.









continued

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

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<pre> Expenses Quick Expense Save </pre>	Quick Expense Please Specify
	Airline Flight
View Receipt	Gas-Rental/Govt Car
	Lodging Tax
Auth	Bus
	Excess baggage
Expense Description (Required)	Internet - Travel
	Baggage Fees
	Parking
	Privately Owned Motorcycle
	Тахі
	M&IE
	Light Rail





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 Expenses Quick Expense	93% + Save	••••• Verizon 🗢	4:29 PM ense Cost		Verizon 4:29 PM C Expenses Quick Expense	93% + Save
View Receipt		50.00	ld requires a numeri	c value.	View Receipt	
Document Type (Required) Auth	>				Document Type (Required) Auth	>
Expense Description (Required) Taxi	>				Expense Description (Required)	>
Expense Date (Required) Thu Jan 19, 2017	>	1	2 ABC	3 DEF	Expense Date (Required) Thu Jan 19, 2017	>
Create Expenses Through Date	>	4 _{бні}	5 JKL	6 MNO	Create Expenses Through Date	>
Cost (Required) No Selection	>	7 PQRS	8 TUV	9 wxyz	Cost (Required) 50.00	>
Expense Category M&IE-PerDiem			0	\bigotimes	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.



Expense

< Home	Expenses	+
Тахі		\$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	>
Тахі		\$25.00
Mar 28, 2017	Tap to edit	>
POV		\$27.00
Feb 19, 2017	Tap to edit	>
Rental Car		\$500.00
Fab 10 0017	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**.



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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.

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raveler, Sample ANUM000107 an 23, 2017 - Jan 26, 2017	\$993.46 Auth	>	Traveler, Sample TANUM000107 Jan 23, 2017 - Jan 26, 2017	
			Document Status Awaiting For Status TA Number Trip Purpose Emissions	Travele TAN
			Add/View Receipt	:
			Trip Type (Required) SINGLE TRIP	
			Document Detail (Requir Program meeting in Ph	ed) illy
			Itinerary (1)	
			Per Diem Locations (1	1)
			Expenses (9)	
Cort				

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

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Vouchers	Voucher	
Traveler, Sam TANUM000107 Jan 23, 2017 - Ja	ple an 26, 2017	\$985.80 A
Document Statu Awaiting For Status TA Number Trip Purpose Emissions	is T	CREATED raveler, Sample A. SIGNED TANUM000107 TRAINING 0
Add/Viev	v Receipt	_
Trip Type (Req SINGLE TRIP	uired)	>
Document De Program mee	tail (Require	d) ly >
Itinerary (1)		>
Per Diem Lo	cations (1)	>
Expenses (9)	>
		Stamp







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





✓ 97%

Save

>

>





Importing Quick Expenses into your voucher

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

••••• Verizon 🗢 4:22 PM 🖬 90% 📻 +	●●○○○ AT&T 🗢 4:03 PM 🕈 100% 🛶	••••• AT&T 😴 2:56 PM	≁ 100% ■ +
Vouchers Voucher	<pre> Expense Please Specify + </pre>	Voucher Expenses	+
Traveler, Sample \$985.80	Hotel Fee - Energy/Facility	SHEARS, BRIAN	\$2,194.50
TANUM000107 A	Departure Tax/Conversion	T000BM9 Apr 24, 2017 - May 03, 2017	CREATED
Document Status CREATED Awaiting Traveler, Sample A. For Status SIGNED	Public Trans/Metro	TDY Voucher Fee Transxn Fees	\$14.75 >
TA Number TANUM00107 Trip Purpose TRAINING	Travel Fee	Feb 22, 2017	EFT
Emissions 0	POV - Avail Govt Vehicle	Parking/Tolls	\$12.00
Add/View Receipt	Securing Evidence	Apr 03, 2017	TRAVELER
Trip Type (Required) > SINGLE TRIP	Rental Car (CBA)	Lodging	\$156.00
Document Detail (Required)	Gas-Rental/Govt Vehicle	Apr 24, 2017	IBA
Program meeting in Philly	Airfare	Create New Exp	bense
Per Diem Locations (1)	Passenger (No Claim)	Select from Exi	sting
Expenses (9)	TMC Fee	Farking/ rolls	\$20.00
Stamp		Cancel	







Importing Quick Expenses

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







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To delete an expense

1. 'Left swipe' on the expense to be deleted.

2. Tap the red **Delete** button.

•	0000 AT&T 🔶	3:54 PM	-	🖌 100% 💷 🗲
	Authorization	Expenses	5	+
	SHEARS, BRIA	N		\$554.91
	Feb 19, 2017 - Feb	21, 2017		CREATED
	TMC Fee Dec 16, 2016			> IBA
	Lodging		\$	84.00
	Lodging-PerDie Feb 19, 2017	m) IBA
	M&IE M&IE-DorDiom		\$	48.00
	Feb 19, 2017		TRA	VELER
		\$27.00		Delete
01	7	TRAVELER	>	Delete
	Rental Car		\$1	50.50
	Rental Car Feb 19, 2017) IBA





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.**





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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

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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.

•••••• Verizon	■ 89% ● +	•••••• Verizon ◆ 4:21 PM
Awaiting Status:	APPROVED	
Stamp to Apply (Required) APPROVED	>	
Remarks	>	
		No Documents to Stamp
	Submit	Sort

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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







- 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.

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• Recommend you pilot a small group of users first before rolling out to the entire organization.

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Mobile Pilot



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



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 <u>travel@fiscal.treasury.gov</u>.

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

