

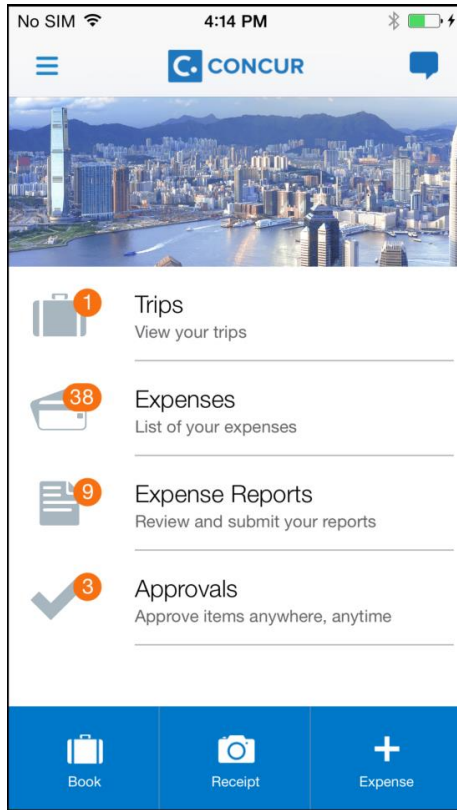
Introduction to.....

Concur for Mobile – iPhone®

Version 9.25 – October 5 2015

Applies to these Concur solutions:

- Expense in Travel & Expense
- Travel
- Travel in Travel & Expense
- Invoice
- Request



You can use Concur on your smartphone to assist with your Expense, Travel, Invoice, and Request needs. Because you are using your smartphone, you can access your information in a cab, in a meeting, at the restaurant – where your laptop is not available or is too cumbersome.

You can check your itinerary; book a flight, rental car, Amtrak, or hotel; get directions from your current location. You can enter out-of-pocket expenses real-time and take a picture of the associated receipt; create, submit, and check the status of your expense reports.

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If you are an approver, you can approve expense reports, requests, payment requests (Invoice), etc.

THIS GUIDE

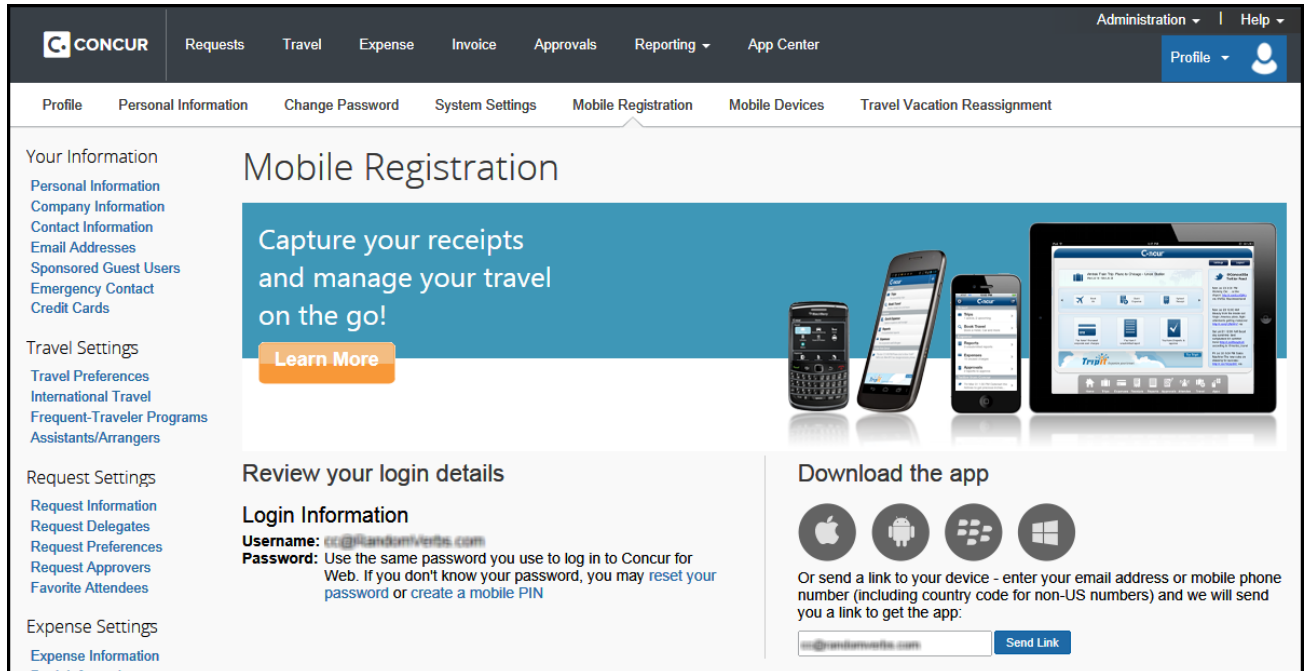
This guide provides brief "how to" steps. It assumes that the user already knows how to use the web version of Concur and already understands the concepts of Expense (expenses, itemizations, attendees, etc.), Travel (booking, rules, etc.), Invoice (payment requests, purchase requests, etc.), the approval process, and so on. It also assumes that the user is generally familiar with his/her mobile device.

This guide is available in DOC and PDF format. You can use the DOC as a starting point for your own training materials. Both are available in online Help (end user and admin) in the web version of Concur.


Download

The **Mobile Registration** link appears on the **Profile** menu in the web version of Concur. Two reasons to use this page:

- You can download the app or you can use this page to request a link.
- When you log in to the app, depending on your company's configuration, you can use the same login credentials that you use for the web version of Concur, you can use Single Sign On (known as SSO), or you can use a PIN (mobile-only password) that you created with this page. (If your company uses SSO, this page will be slightly different.)



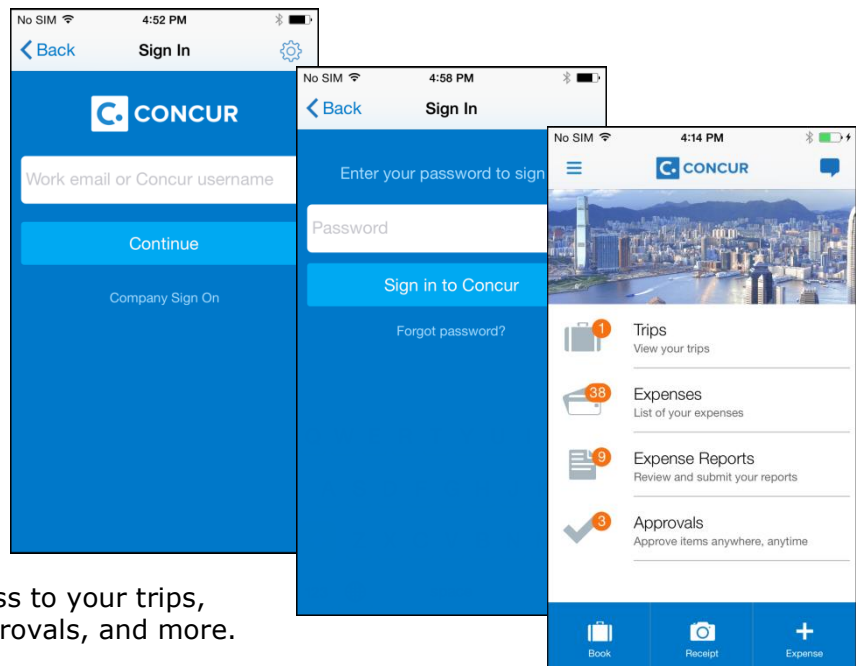
Log In

Tap  in your device apps list. Then, on the **Sign In** screen, enter your work email or your Concur (web version) user name. Tap **Continue**. On the next screen, enter your password and tap **Sign In to Concur**.

– or –

Tap **Company Sign On** if your company uses SSO to access Concur for Mobile.

The home screen provides access to your trips, expenses, expense reports, approvals, and more.



Permissions

The options that appear on the home screen vary depending on the user's permissions. Users with the Travel Wizard User permission have access to the Travel-related features. Users with the Expense User permission have access to the Expense-related features. Approvers must have the proper approver role/permission.

Trips

View an Itinerary




If you have any trips, a counter **1** is displayed in the **Trips** section of the home screen.

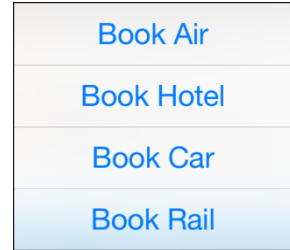
- 1) On the home screen, tap **Trips**.
- 2) On the **Trips** screen, tap to open the desired trip.
- 3) Tap each segment to see the details.

Book a Flight

Depending on your configuration, you may be able to search for and book a flight.


To access the **Book Air** menu option:

- On the home screen, tap:
 -  (lower-left corner) – or –
 -  (upper-left corner) and then **Book Travel**
- or –
- On the **Trips** screen, tap:
 - Book a Trip** – or –
 -  (upper-right corner)







Then:

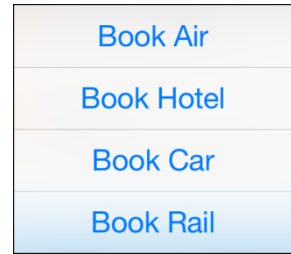
- On the **Book Air** screen:
 - Tap **One Way** or **Round Trip**.
 - Enter the search criteria.
 - Tap **Search** (upper-right corner).
- On the **Results Summary** screen, tap the desired carrier.
- On the next screen, tap the desired flight.
- On the **Flight Details** screen:
 - Review for accuracy.
 - Fill in the fields (if any) and make the desired selections.
 - Tap **Reserve** (upper-right corner).

Tap here to sort 

Book a Rental Car

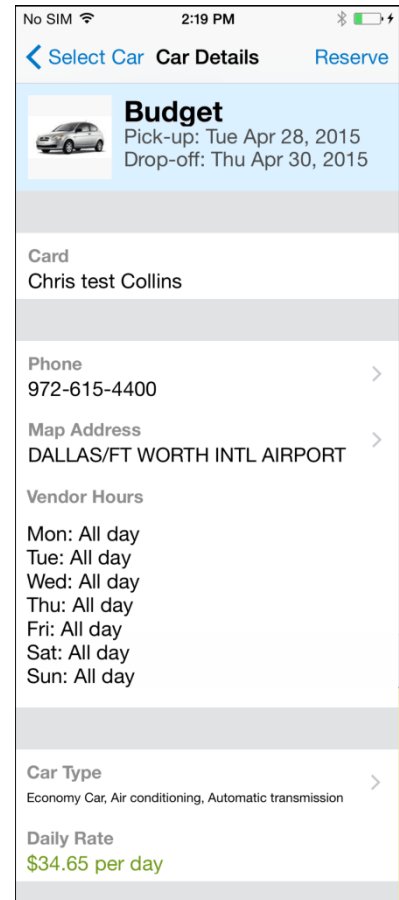
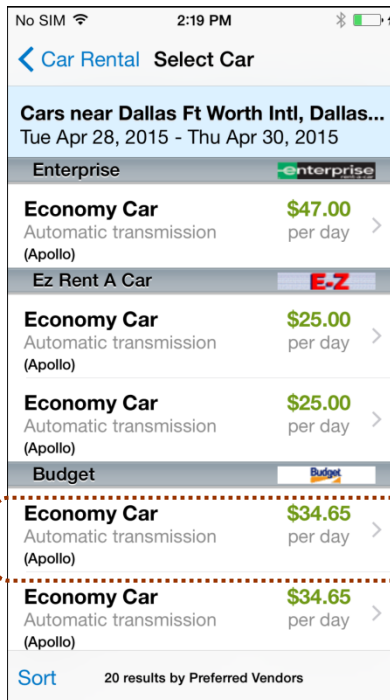
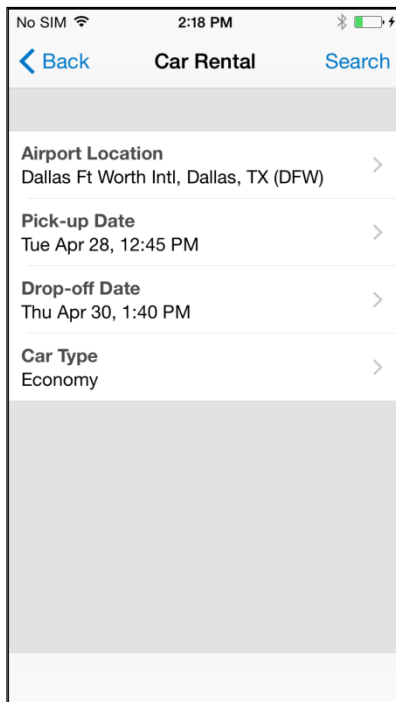
To access the **Book Car** menu option:

- On the home screen, tap:
 - ◆  (lower-left corner) – or –
 - ◆  (upper-left corner) and then **Book Travel**
- or –
- On the **Trips** screen, tap:
 - ◆ **Book a Trip** – or –
 - ◆  (upper-right corner)
- or –
- To add a car to an existing itinerary, with the itinerary open, tap  (upper-right corner).



Then:





- 1) On the **Car Rental** screen:
 - Enter the search criteria.
 - Tap **Search** (upper-right corner).
- 2) On the **Select Car** screen, tap the desired car.
- 3) On the **Car Details** screen:
 - Review for accuracy.
 - Fill in the fields (if any) and make the desired selections.
 - Tap **Reserve** (upper-right corner).

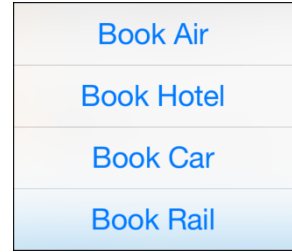


Depending on your company's configuration, you may not be able to book a car unless you are adding it to an existing itinerary.

Book a Hotel

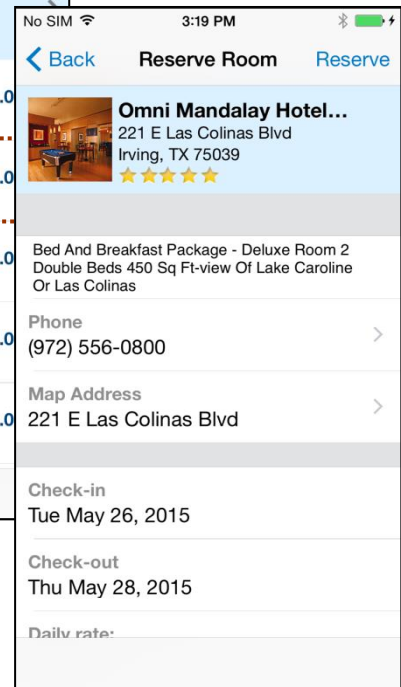
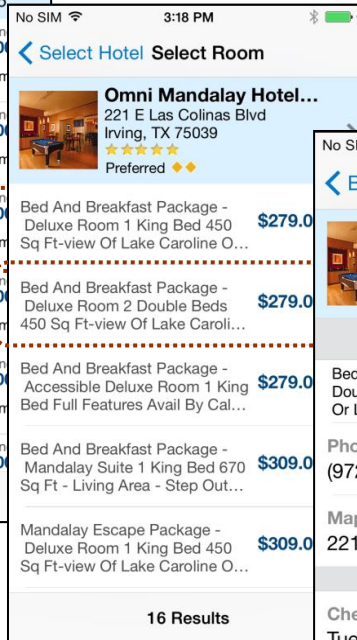
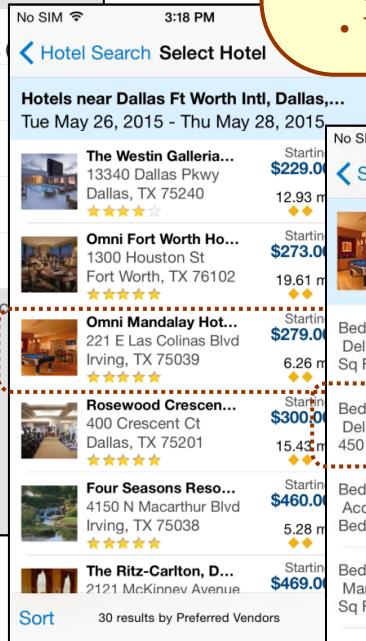
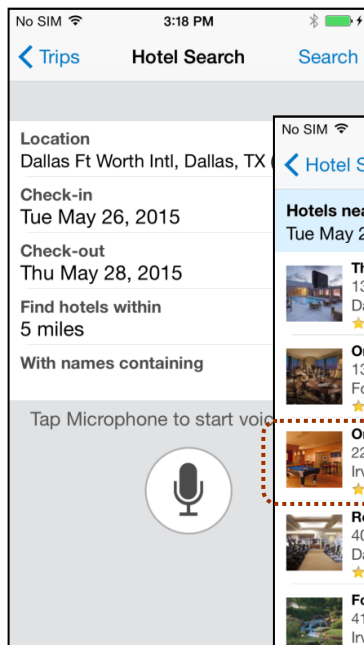
To access the **Book Hotel** menu option:

- On the home screen, tap:
 -  (lower-left corner) – or –
 -  (upper-left corner) and then **Book Travel**
- or –
- On the **Trips** screen, tap:
 - Book a Trip** – or –
 -  (upper-right corner)
- or –
- To add hotel to an existing itinerary, with the itinerary open, tap  (upper-right corner).



Then:

- On the **Hotel Search** screen:
 - Enter the search criteria.
 - Tap **Search** (upper-right corner).
- On the **Select Hotel** screen, tap the desired hotel.
- On the **Select Room** screen, tap the desired room.
- On the **Book Room** screen:
 - Review for accuracy.
 - Fill in the fields (if any) and make the desired selections.
 - Tap **Reserve**.





Depending on your company's configuration, you may not be able to book a hotel unless you are adding it to an existing itinerary.


Book Amtrak Direct Connect

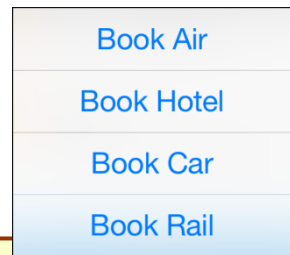
You can book rail if your company is configured to use Amtrak Direct Connect.

To access the **Book Rail** menu option:

- On the home screen, tap:
 - ◆  (lower-left corner) – or –
 - ◆  (upper-left corner) and then **Book Travel**

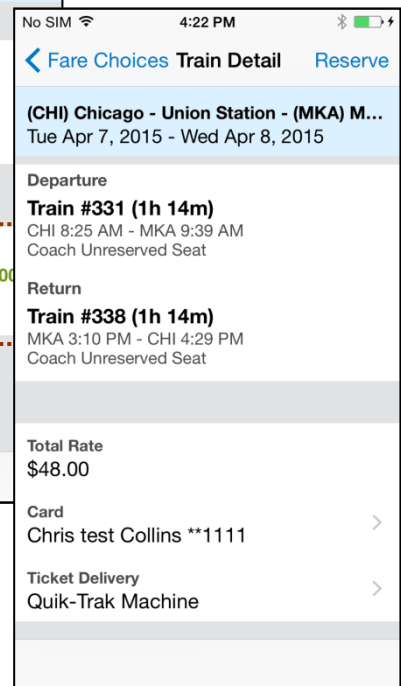
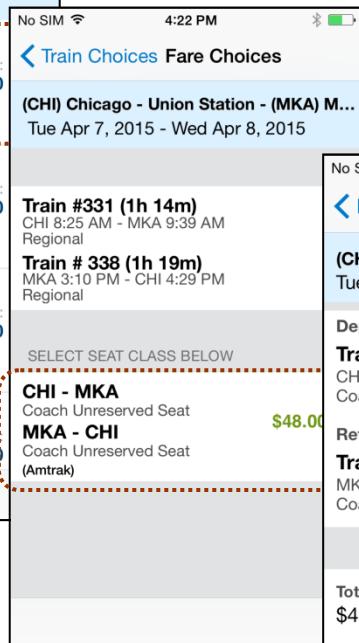
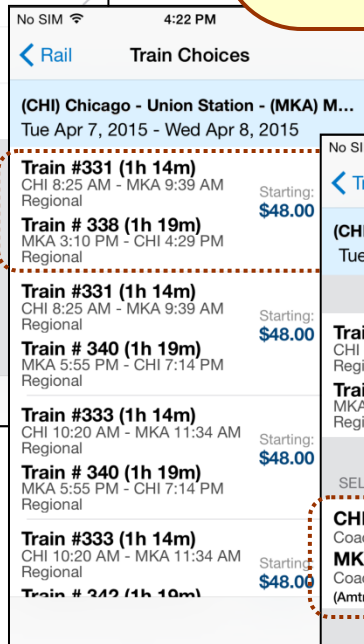
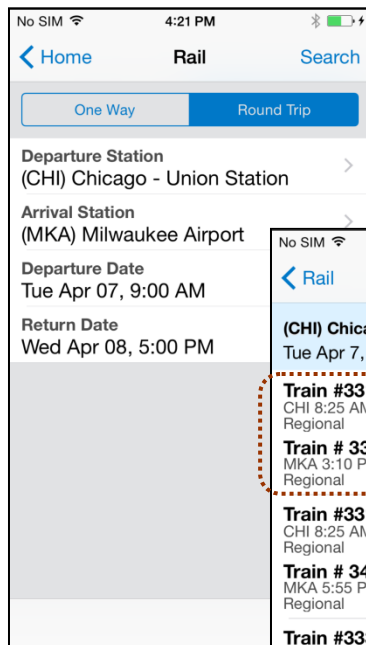
– or –

- On the **Trips** screen, tap:
 - ◆ **Book a Trip** – or –
 - ◆  (upper-right corner)



Then:





- 1) On the **Rail** screen:
 - Tap **One Way** or **Round Trip**.
 - Enter the search criteria.
 - Tap **Search** (upper-right corner).
- 2) On the **Train Choices** screen, tap the desired trip.
- 3) On the **Fare Choices** screen, tap the desired fare.
- 4) On the **Train Detail** screen:
 - Review for accuracy.
 - Fill in the fields (if any) and make the desired selections.
 - Tap **Reserve** (upper-right corner).

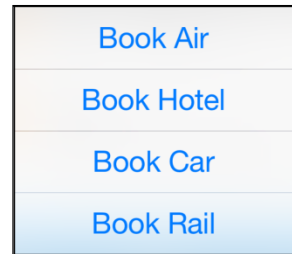


Book a Flight or Hotel Using Voice

You can book a flight or hotel using voice.

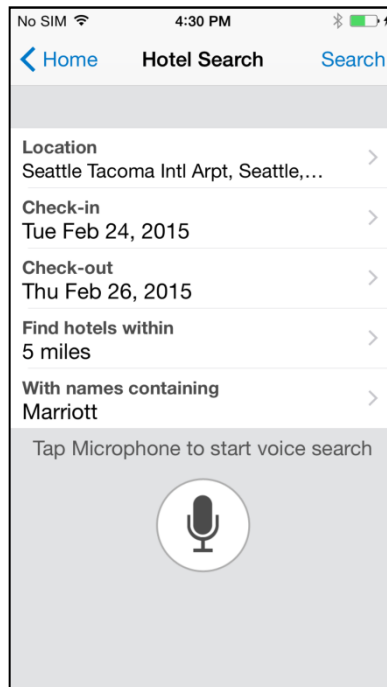
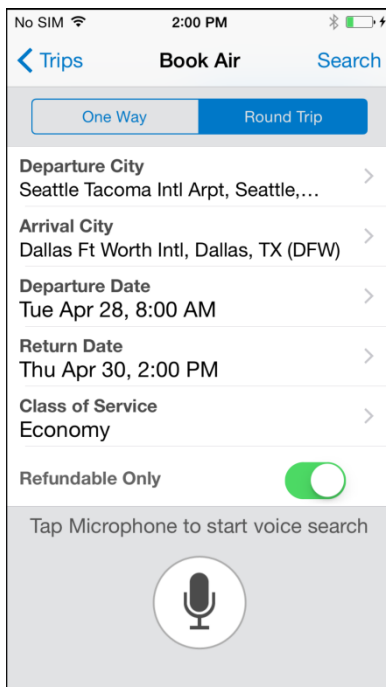
To access the menu:

- On the home screen, tap:
 - ♦  (lower-left corner) – or –
 - ♦  (upper-left corner) and then **Book Travel**
- or –
- On the **Trips** screen, tap:
 - ♦ **Book a Trip** – or –
 - ♦  (upper-right corner)
- or –
- With an itinerary open, tap  (upper-right corner).

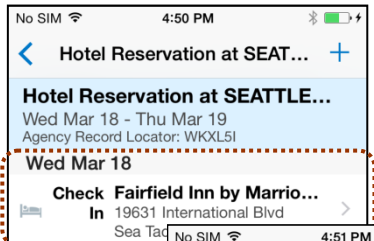


Then:

- 1) On the menu, tap **Book Air** or **Book Hotel**, whichever applies.
- 2) On the bottom of the screen, tap the microphone.
- 3) Follow the instructions on the screen.

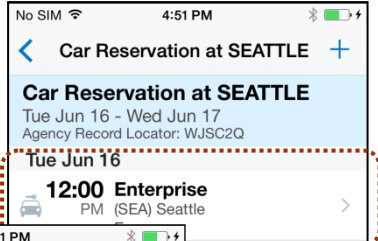


Cancel a Hotel or Rental Car Reservation

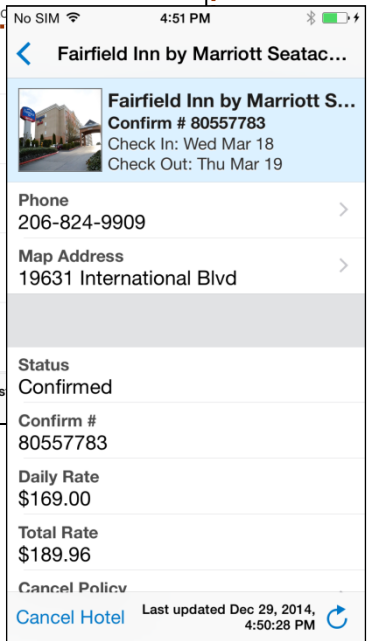


Hotel Reservation at SEATTLE...
Wed Mar 18 - Thu Mar 19
Agency Record Locator: WKXL51
Wed Mar 18
Check In Fairfield Inn by Marri...
In 19631 International Blvd
Sea Tac

1) Open the itinerary.
2) Tap the reservation.
3) Tap **Cancel Hotel** or **Cancel Car** (lower-left corner).



Car Reservation at SEATTLE
Tue Jun 16 - Wed Jun 17
Agency Record Locator: WJSC2Q
Tue Jun 16
12:00 Enterprise
PM (SEA) Seattle



Fairfield Inn by Marriott S...
Confirm # 80557783
Check In: Wed Mar 18
Check Out: Thu Mar 19

Phone
206-824-9909

Map Address
19631 International Blvd

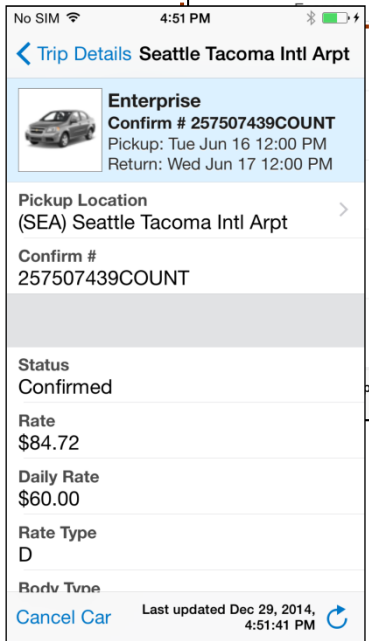
Status
Confirmed

Confirm #
80557783

Daily Rate
\$169.00

Total Rate
\$189.96

Cancel Policy
[Cancel Hotel](#) Last updated Dec 29, 2014, 4:50:28 PM



Enterprise
Confirm # 257507439COUNT
Pickup: Tue Jun 16 12:00 PM
Return: Wed Jun 17 12:00 PM

Pickup Location
(SEA) Seattle Tacoma Intl Arpt

Confirm #
257507439COUNT

Status
Confirmed

Rate
\$84.72

Daily Rate
\$60.00

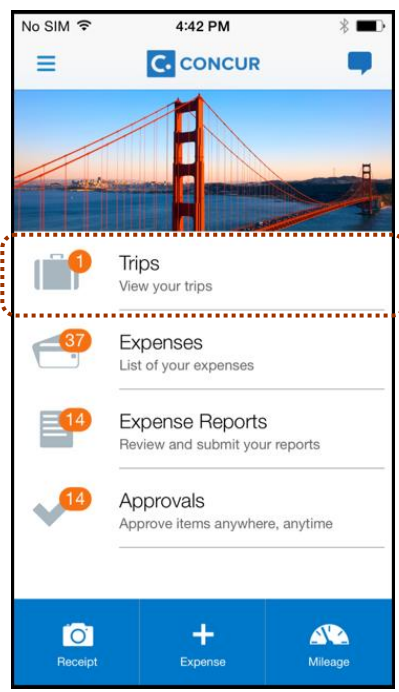
Rate Type
D

Body Type
[Cancel Car](#) Last updated Dec 29, 2014, 4:51:41 PM

View Agency Information

You can access your agency information, such as hours, phone numbers, and web site information.

1) On the home screen, tap **Trips**.
2) On the **Trips** screen, tap **Travel Agency Info**.



CONCUR

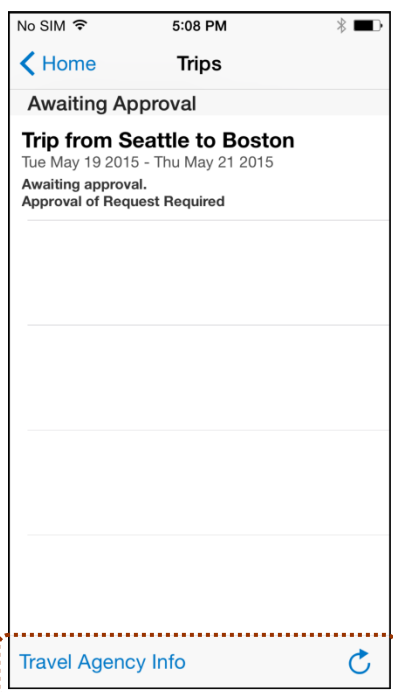
Trips
View your trips

Expenses
List of your expenses

Expense Reports
Review and submit your reports

Approvals
Approve items anywhere, anytime

Receipt Expense Mileage

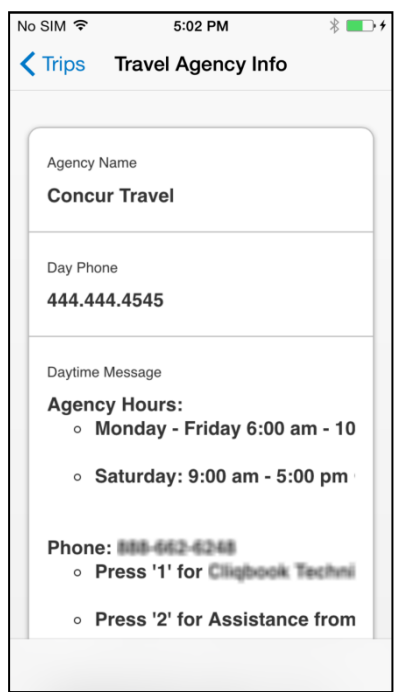


Trips

Awaiting Approval

Trip from Seattle to Boston
Tue May 19 2015 - Thu May 21 2015
Awaiting approval.
Approval of Request Required

[Travel Agency Info](#)



Travel Agency Info

Agency Name
Concur Travel

Day Phone
444.444.4545

Daytime Message

Agency Hours:


- Monday - Friday 6:00 am - 10
- Saturday: 9:00 am - 5:00 pm

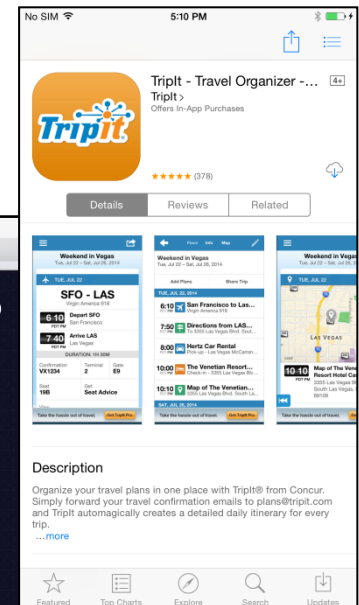
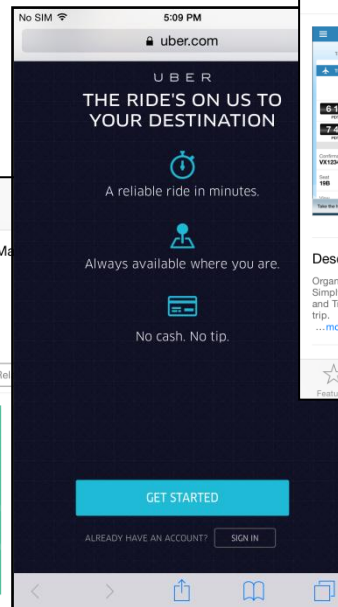
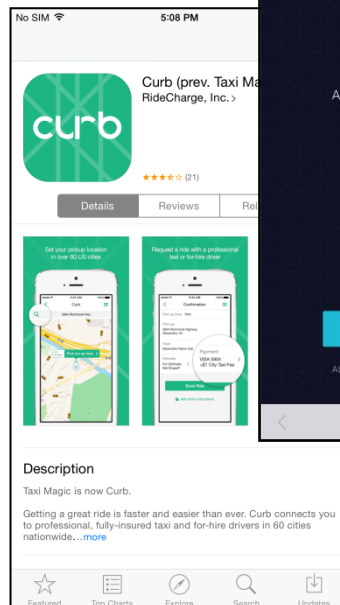
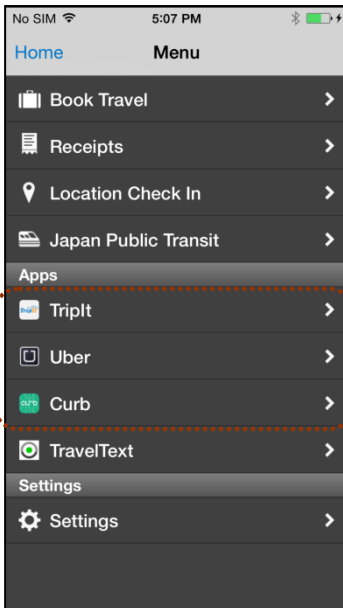
Phone: 888-662-6248

- Press '1' for Clickbook Techni
- Press '2' for Assistance from

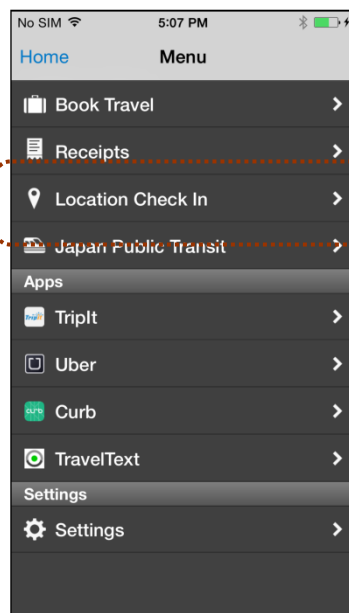
Use Curb, Uber, and TripIt

Depending on your company's configuration, Curb (formerly Taxi Magic), Uber, and TripIt may be available for download via the home screen.


- 1) On the home screen, tap  (upper-left corner).
- 2) On the **Menu** screen, tap the desired option and download.



Check-in with Locate & Alert





If your company uses Concur's Locate & Alert service, you can check-in using your device.

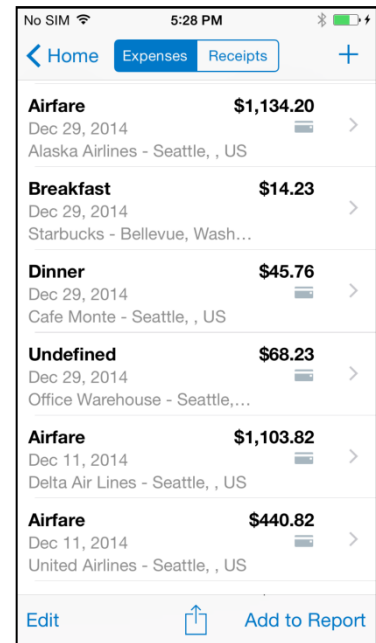
- 1) On the home screen, tap  (upper-left corner).
- 2) On the **Menu** screen, tap **Location Check In**.

Expenses and Expense Reports

Expense List (Expenses Screen)

On the home screen, tap **Expenses** to access your list of expenses. Use the **Expenses** screen to:

- Add, view, edit, and delete *mobile* expenses. Mobile expenses are designed to be quick and easy.
 - ◆ To make more extensive features like itemizations and attendees, either:
 - Add the *mobile* expense to an expense report then edit.
 - Create the expense on an open expense report and then edit.
 - ◆ For car mileage/kilometers expenses, use the  icon (lower-right corner) on the home screen.
- View and make minimal edits to card transactions, which appear with the  icon.
 - ◆ To make more extensive edits, add the card transaction to an expense report then edit.
 - ◆ To *delete* a card transaction, use the web version of Expense, if your company allows you to delete card transactions.
- View e-receipts, which can be edited once attached to a report.
- Attach expenses – *mobile* expenses, e-receipts, and card transactions – to a new or existing expense report.



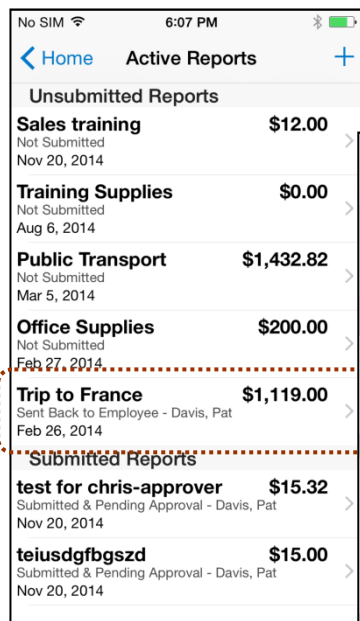
Tap here to sort

Expense Report List (Reports Screen)

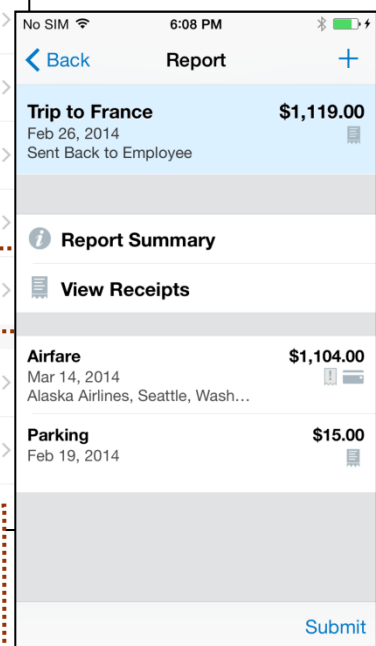
On the home screen, tap **Expense Reports** to access the list of expense reports. On the **Active Reports** screen, you can see the name, status, date, and amount of each report. You can also create a new report.

You can open an existing expense report and:

- View and edit the report summary (report header)
- View and attach receipt images
- View, add, edit (add attendees and itemizations), and remove expenses
- Submit your report


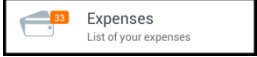



All active reports are separated into **Unsubmitted, Submitted, and Other** sections. Within each category, the reports are sorted by report date.



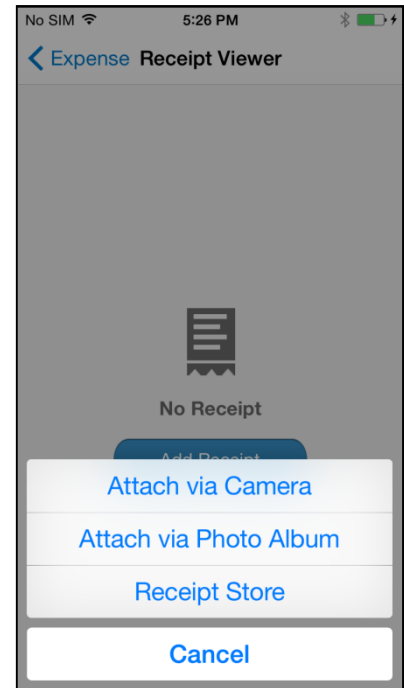
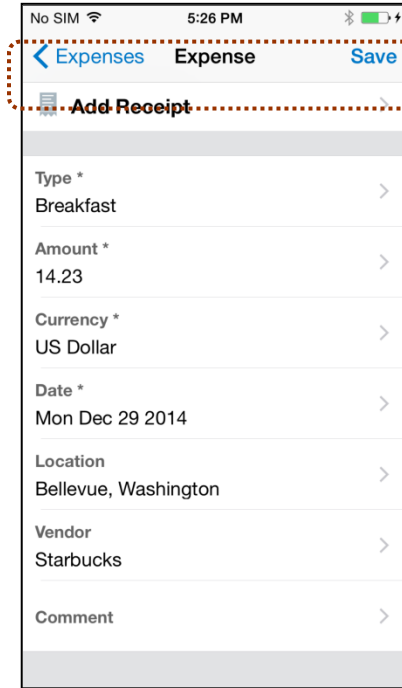
Create a Mobile Expense

To create a *mobile* expense:

- On the home screen, tap  (lower-right corner).
- or -
- On the home screen, tap , then on the **Expenses** screen, tap .

Then:

- On the **Expense** screen, fill in the fields and make the desired selections.
- Tap **Add Receipt**.
- Take a picture of the receipt or grab an existing image from the Photo Album or the Receipt Store.
- Tap **Save**.

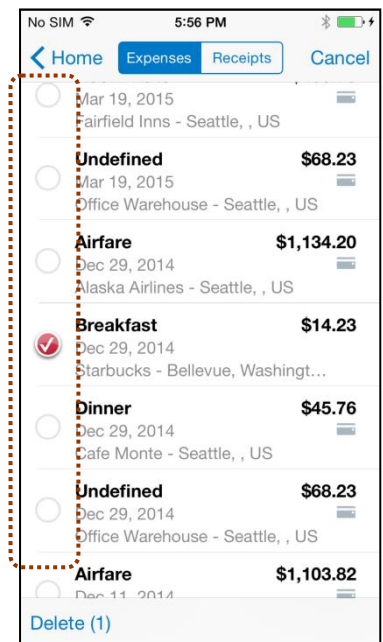
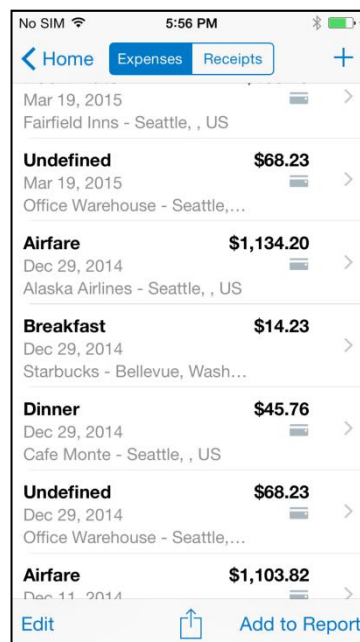


Delete an Expense from the Expenses Screen

You can delete a *mobile* expense from the **Expenses** screen.

NOTE: To delete a *card* transaction, use the web version of Expense - if your company allows you to delete card transactions.

- On the **Expenses** screen, tap **Edit** (lower-left corner). The selection circles appear.
- Tap one or more selection circles.
- Tap **Delete** (lower-left corner).



Create a New Expense Report

You can create a new report:

- From the **Active Reports** screen (shown here)
- While adding expenses from the **Expense** screen (described on the following pages)
- While creating a car mileage expense (described on the following pages)

1) On the home screen, tap **Expense Reports**.

2) On the **Active Reports** screen, tap **+** (upper-right corner).

3) On the **Create Report** screen:

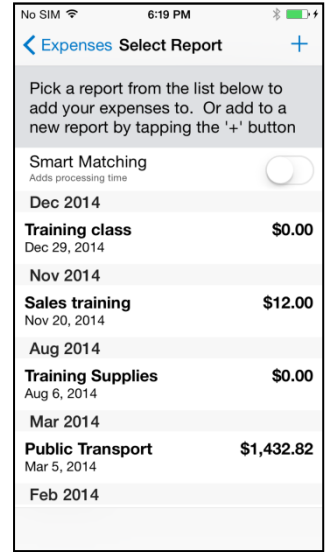
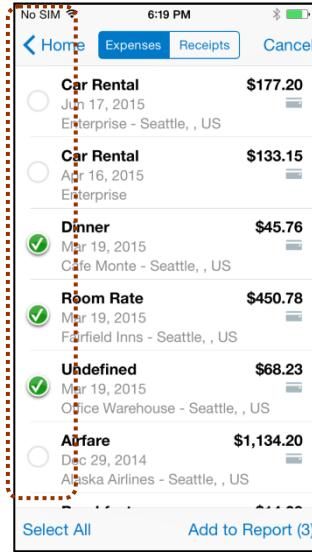
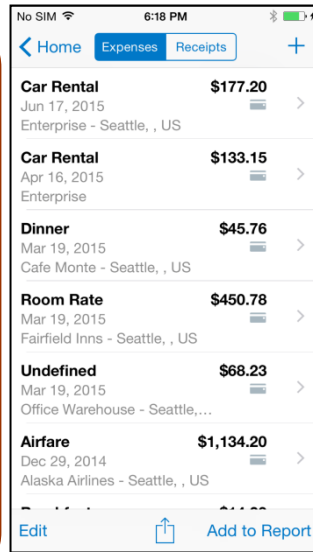
- Concur provides a report name. Change it if desired.
- Fill in the fields and make the desired selections.
- Tap **Save**.

4) On the **Report** screen, enter your expenses, attach receipts, etc. (described on the following pages).

Move Expenses from the Expenses Screen to an Expense Report

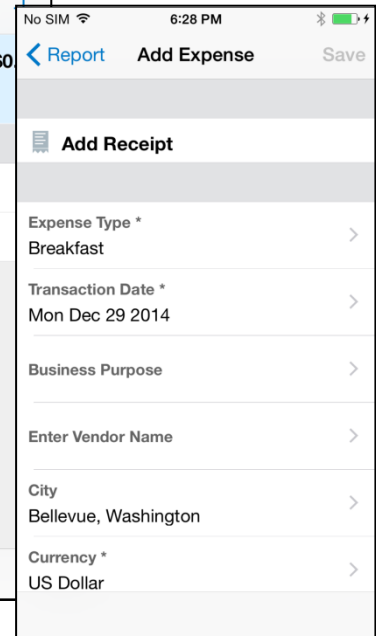
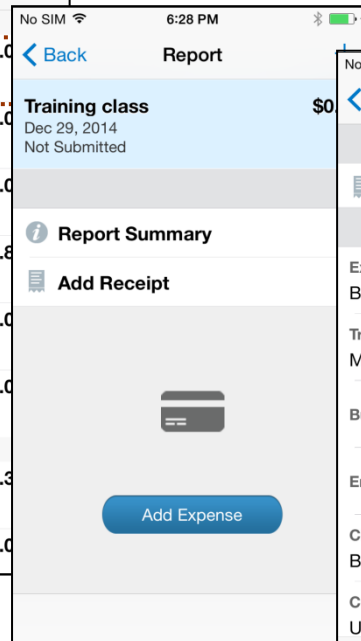
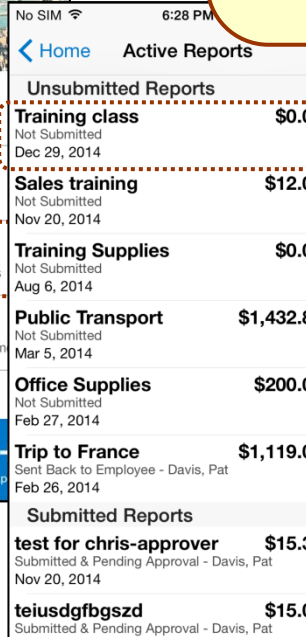
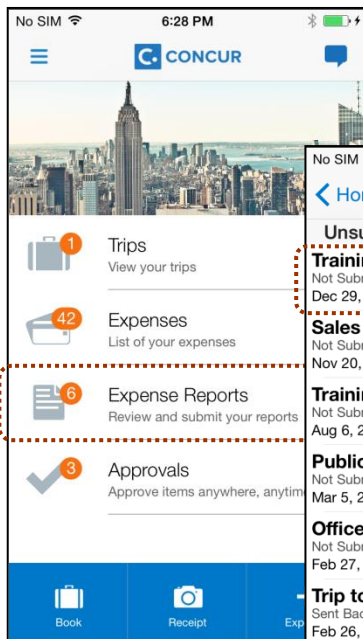
You can move expenses to an existing expense report or use them to create a new expense report or.

- 1) On the **Expenses** screen, tap **Add to Report** (lower-right corner). The selection circles appear.
- 2) Tap one or more selection circles.
- 3) Tap **Add to Report** again.
- 4) Tap an existing report or tap **+** (upper-right corner) to create a new one.




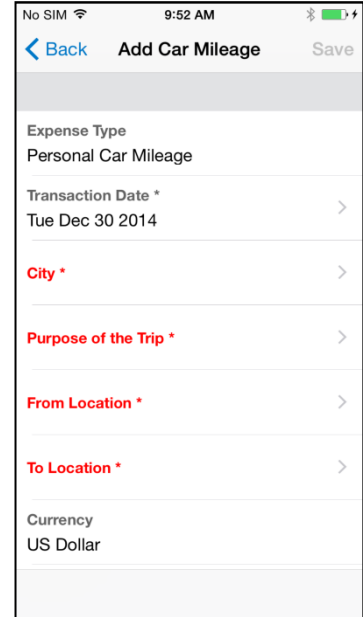
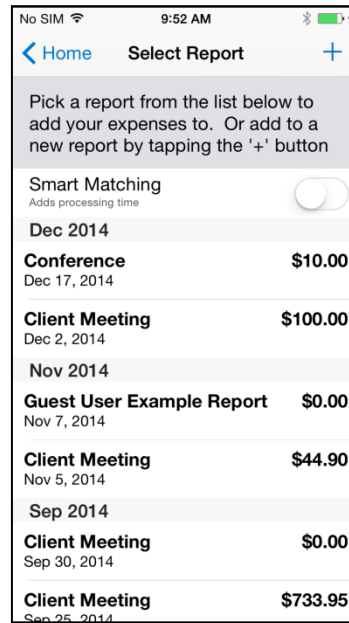
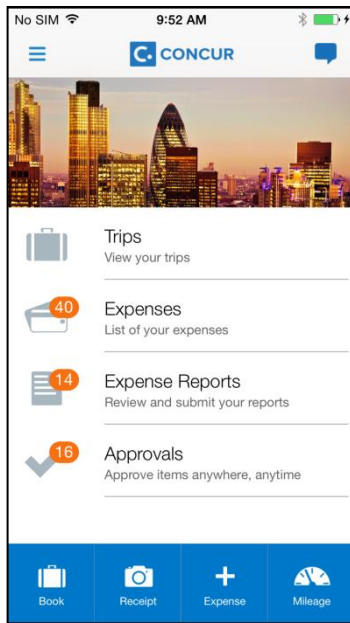
Create an Expense with an Open Expense Report

- 1) On the home screen, tap **Expense Reports**.
- 2) On the **Active Reports** screen, tap to open the desired report.
- 3) On the **Report** screen, tap **+** or **Add Expense** to create a new expense.
- 4) On the **Add Expense** screen:
 - Choose the desired expense type.
 - Fill in the fields and make the desired selections.
 - Tap **Save**.



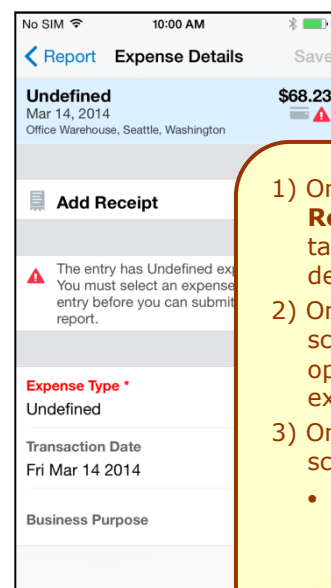
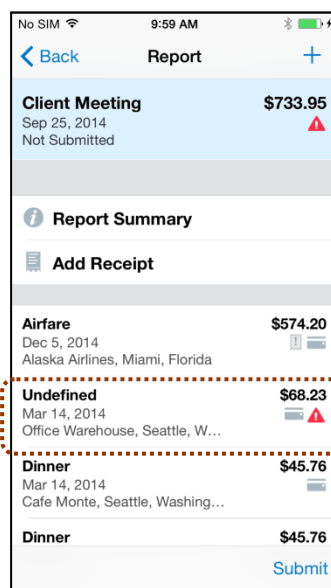
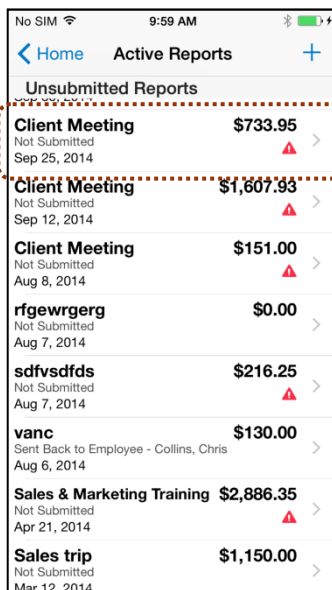
Add a Car Mileage (or Kilometer) Expense

- 1) On the home screen, tap  (lower-right corner).
- 2) On the **Select Report** screen, either tap the desired expense report or tap **+** (upper-right corner) to create a new report.
- 3) On the **Add Car Mileage** screen:
 - Fill in the fields and make the desired selections.
 - **Note:** Concur calculates the amount based on the distance and the company's mileage rate.
 - Tap **Save**.



Edit an Expense on an Expense Report

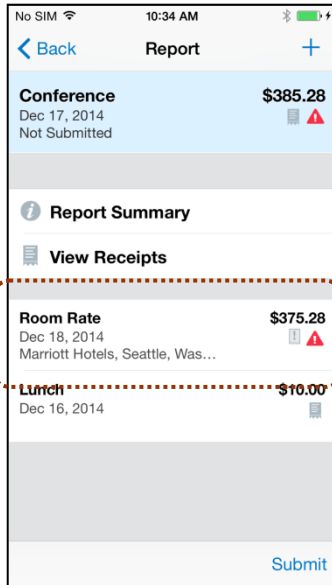
If an expense is attached to an **unsubmitted** expense report, you can edit almost every field.



- 1) On the **Active Reports** screen, tap to open the desired report.
- 2) On the **Report** screen, tap to open the desired expense.
- 3) On the **Expense** screen:
 - Make the desired changes.
 - Tap **Save**.

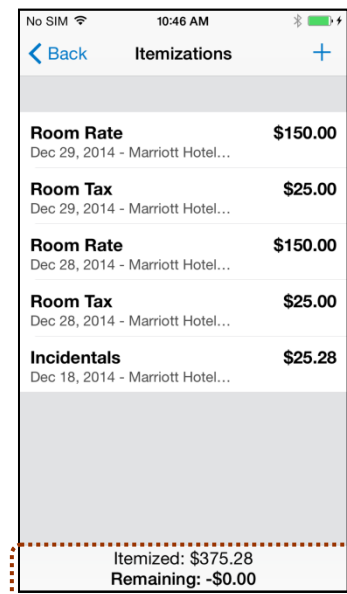
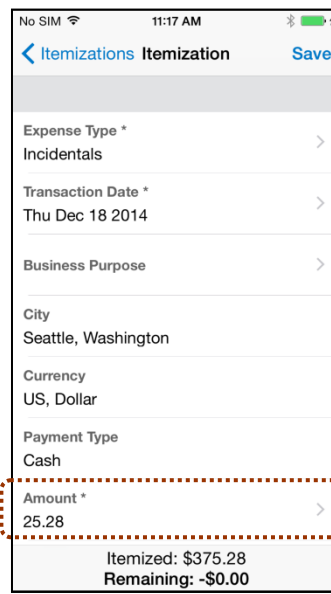
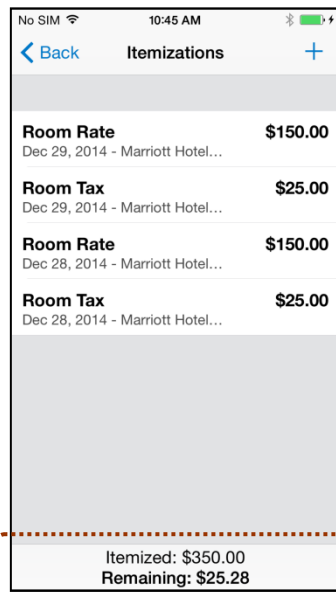
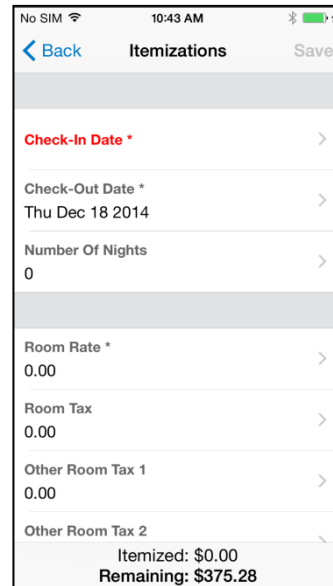
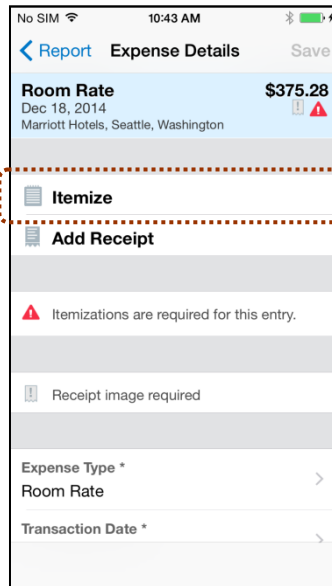
Itemize an Expense

After an expense has been added to a report, you can itemize the expense.



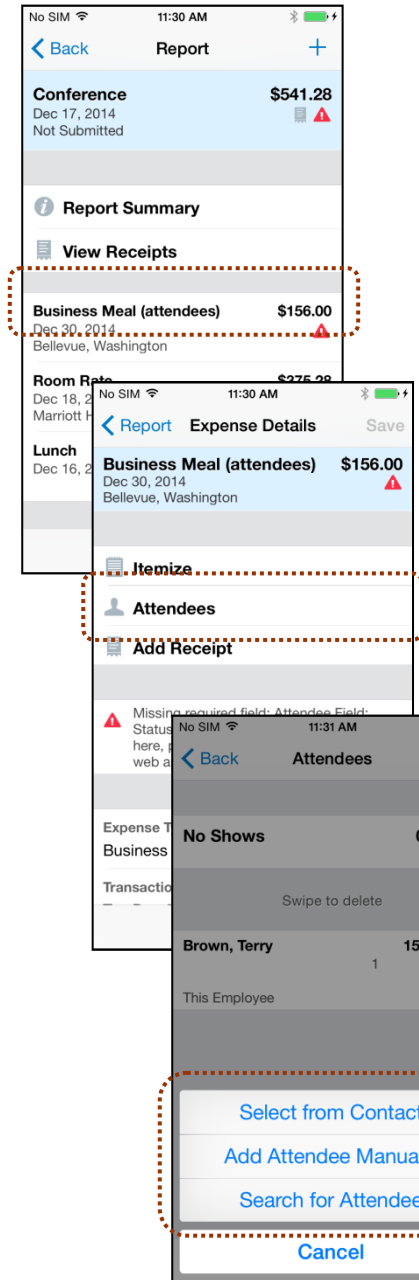
- 1) On the **Report** screen, tap to open the desired expense.
- 2) On the **Expense Details** screen, tap **Itemize**.
- 3) On the **Itemizations** screen:
 - Enter the daily room rate and daily tax rate.
 - Tap **Save**. The individual itemizations appear.

If there is a remaining balance, tap **+** (upper-right corner) and create the remaining expenses, to bring the remaining balance to zero.

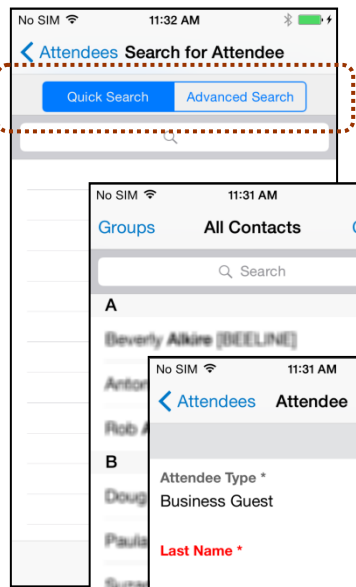


Add Attendees to an Expense

After an expense has been added to a report, you can add attendees to the expense.



- 1) On the **Report** screen, tap to open the desired expense.
- 2) On the **Expense Details** screen, tap **Attendees**.
- 3) On the **Attendees** screen, tap **+** (upper-right corner) to add.
- 4) On the menu, tap one of the following:
 - **Search from Contact** to select from your smartphone contact list
 - **Add Attendee Manually** to manually add the attendee
 - **Search for Attendee > Quick Search** to search your Favorite Attendees
 - **Search for Attendee > Advanced Search** to search your company's list of attendees or from an external source (like Salesforce)



Search for Attendee > Quick Search

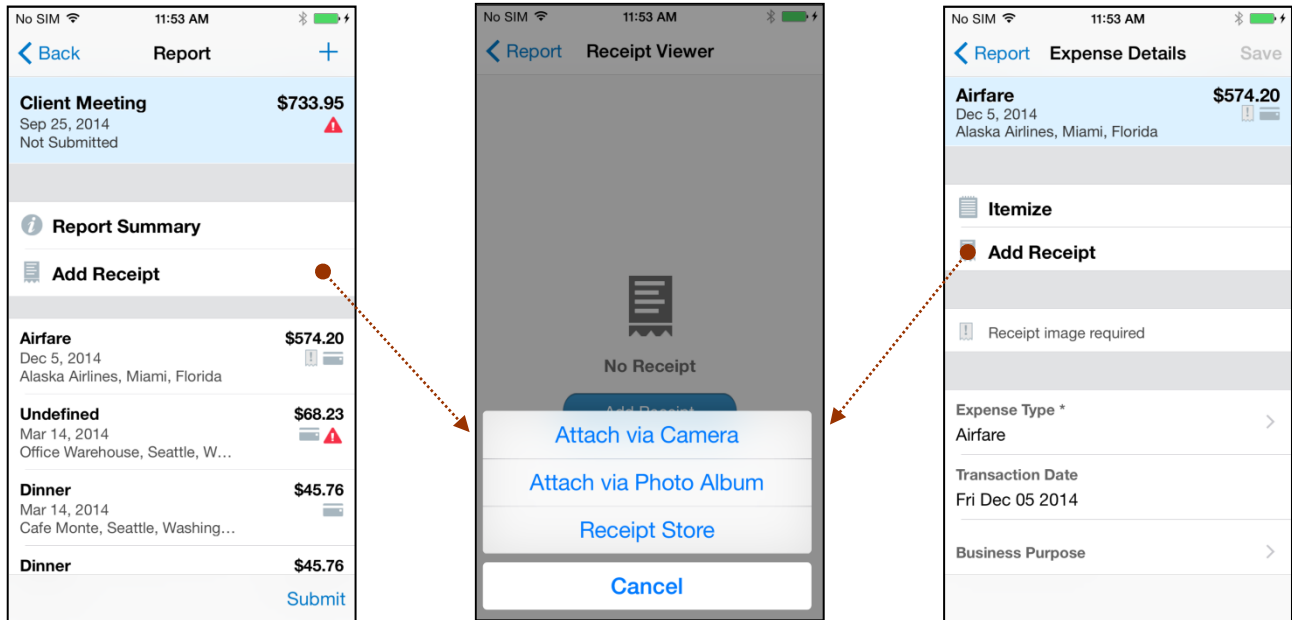
Search for Attendee > Advanced Search

Select from Contact

Add Attendee Manually

Attach Receipts

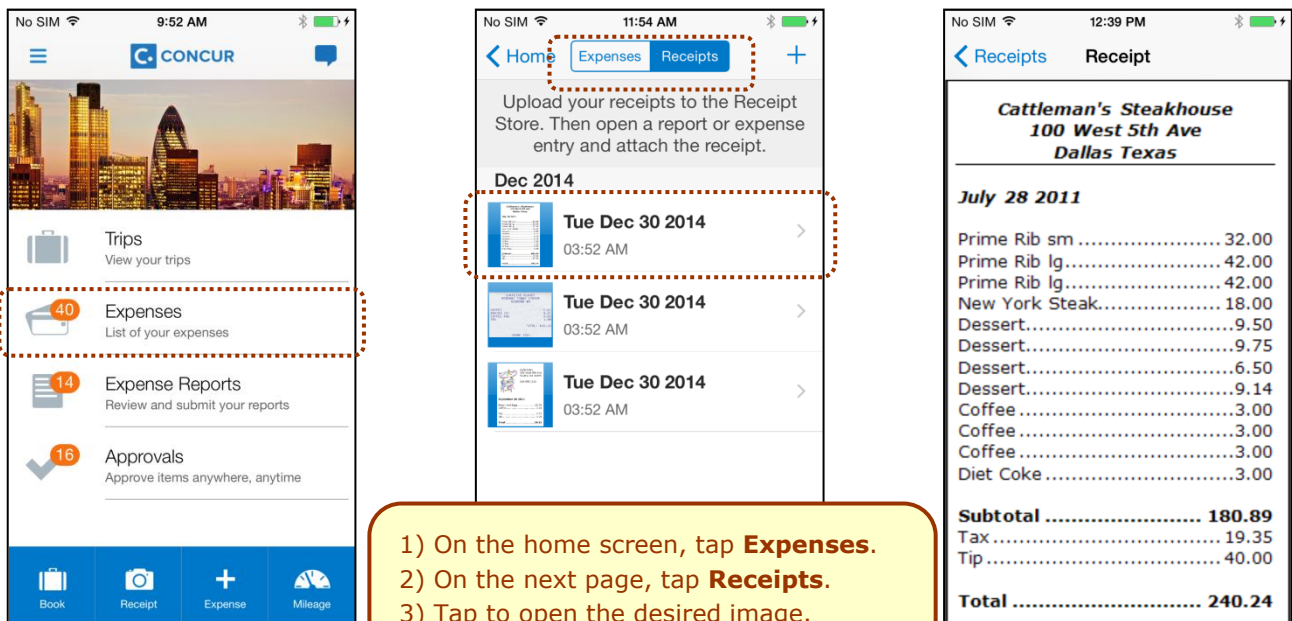
Attach a receipt to a report or to an individual expense, whichever the situation requires.



- 1) On the **Report** screen or the **Expense Details** screen, tap **Add Receipt**.
- 2) On the menu, tap:
 - **Attach via Camera** to use your device camera
 - **Attach via Photo Album** to select an image in your device photos
 - **Receipt Store** to select an image in your Concur Receipt Store

View Receipt Store Images

You can easily view your images in the Receipt Store.

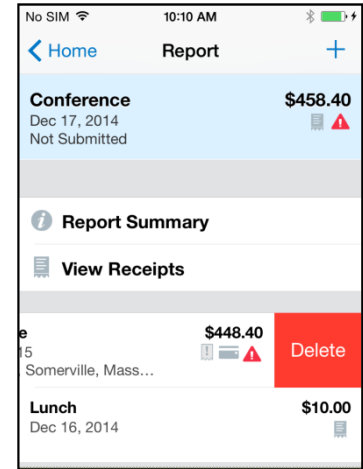
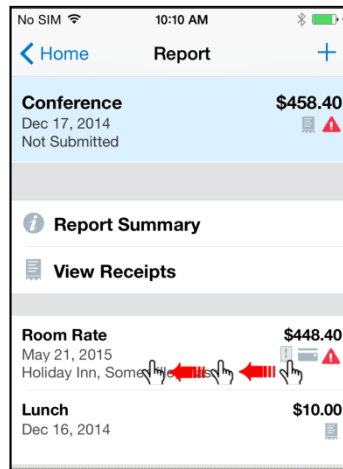


- 1) On the home screen, tap **Expenses**.
- 2) On the next page, tap **Receipts**.
- 3) Tap to open the desired image.

Remove an Expense from an Expense Report

You can remove an expense from an **unsubmitted** expense report.

- 1) On the expense report, slide the desired expense to the left. The **Delete** button appears.
- 2) Tap **Delete**.



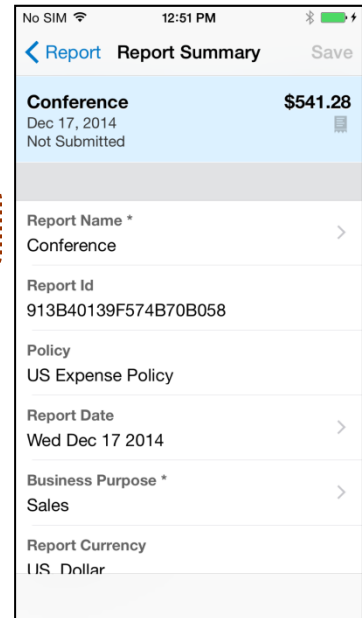
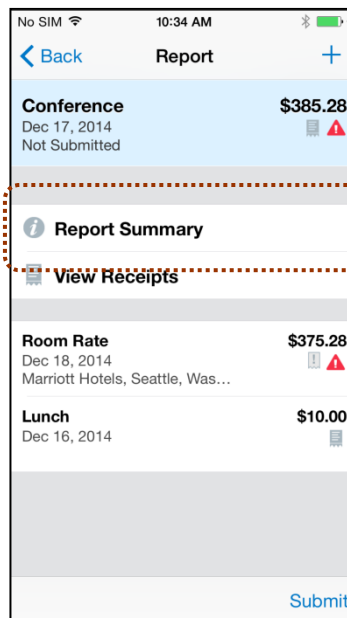
NOTE: If you delete a *mobile* expense or an expense created from a card transaction, it is not really deleted; it is moved back to the "pool" of expenses on the **Expenses** screen.

If you delete any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of Expense.)

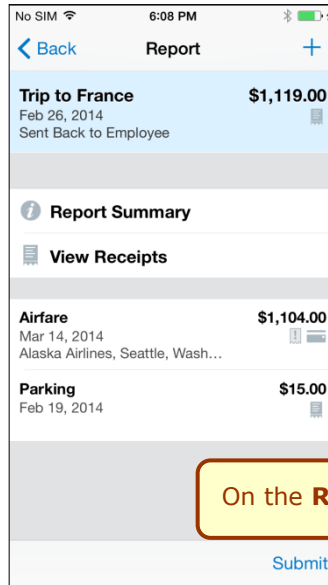
Edit Report Header Information

You can edit the report name, date, and other company-defined fields on an **unsubmitted** report.

- 1) On the **Report** screen, tap **Report Summary**.
- 2) On the **Report Summary** screen, make the desired changes.
- 3) Tap **Save**.



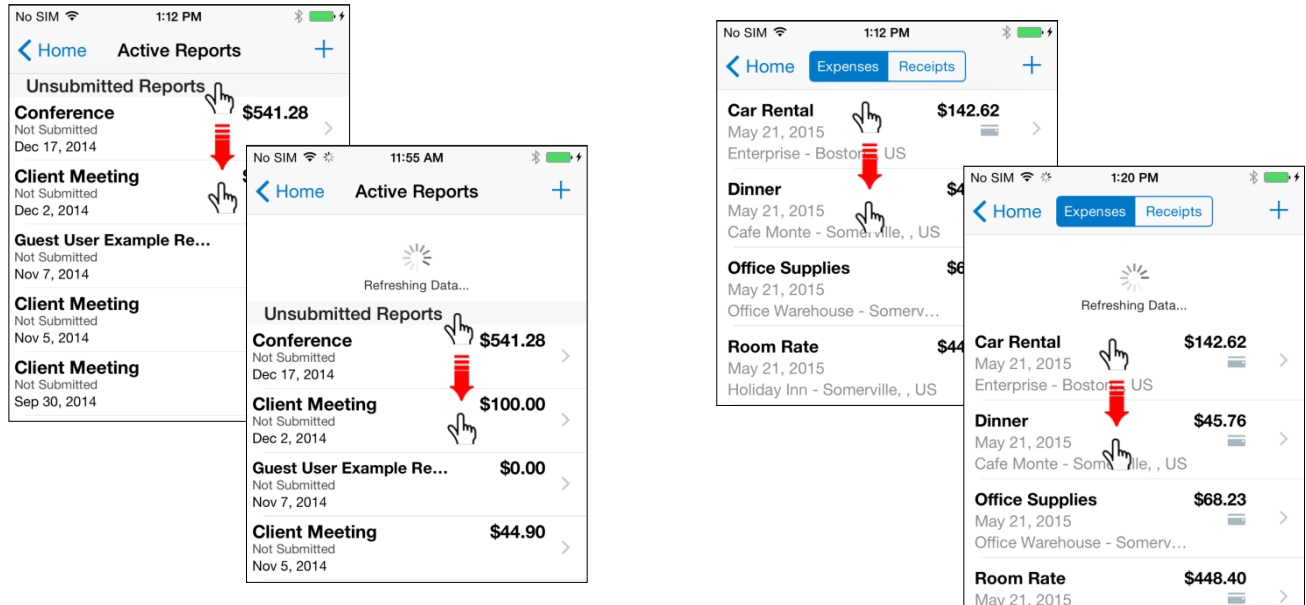
Submit an Expense Report



On the **Report** screen, tap **Submit**.

Refresh Data

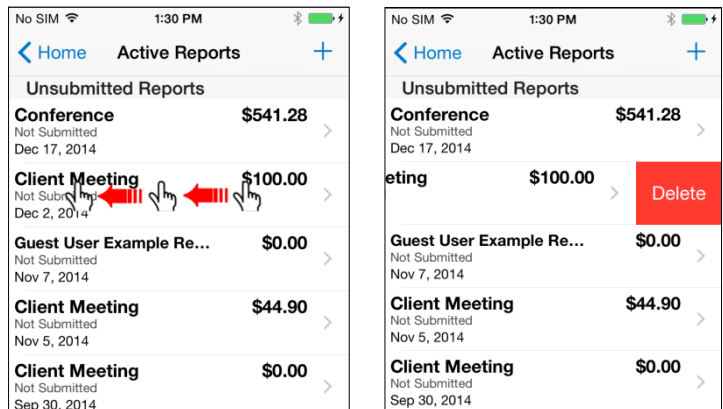
To refresh data, for example, expenses and reports, pull down from the top.



Delete an Unsubmitted Expense Report

- 1) On the **Active Reports** screen, slide the desired report to the left. The **Delete** button appears.
- 2) Tap **Delete**.

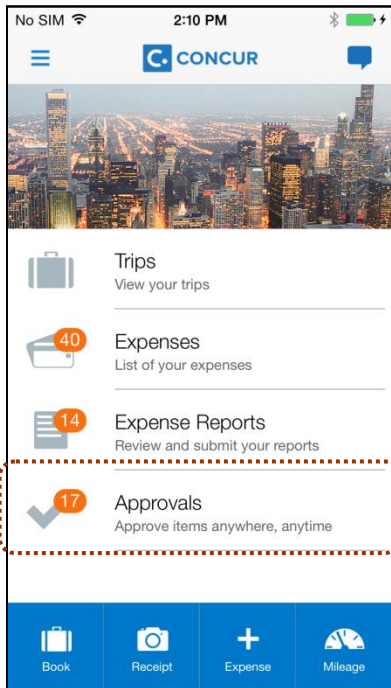
NOTE: Expenses on the report that are related to card transactions are not really deleted – they are returned to the "pool" of card transactions. Cash transactions are truly deleted.



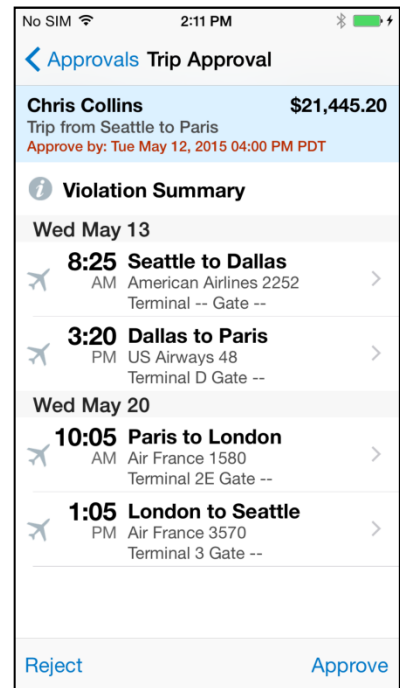
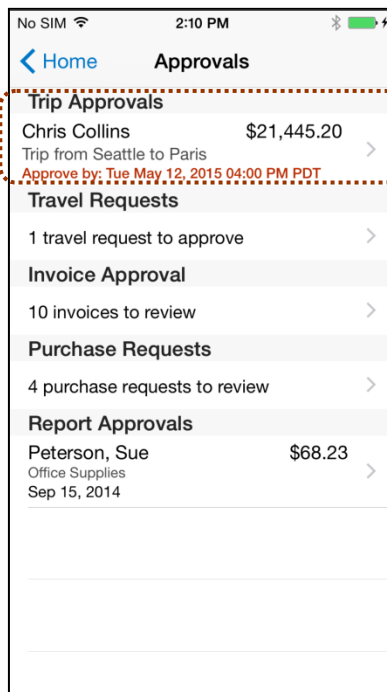
Approvals

Trips

Use **Approvals** on the home screen to view and approve trips (if you are a trip approver).

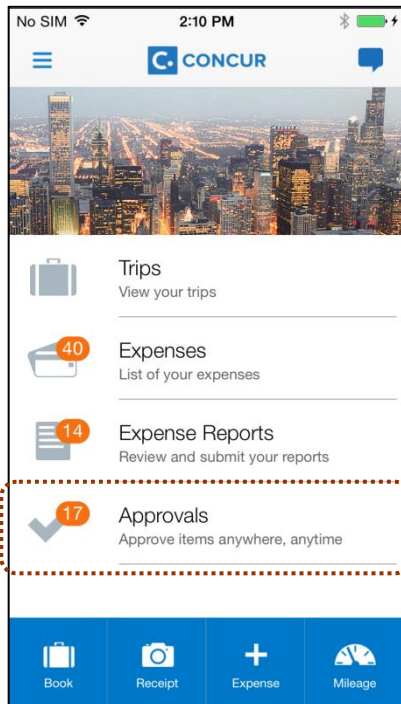


- 1) On the home screen, tap **Approvals**.
- 2) On the **Approvals** screen, tap to open the desired trip.
- 3) On the **Trip Approval** screen:
 - View the report details (segments, violations, etc.).
 - Tap **Approve** or **Reject**.

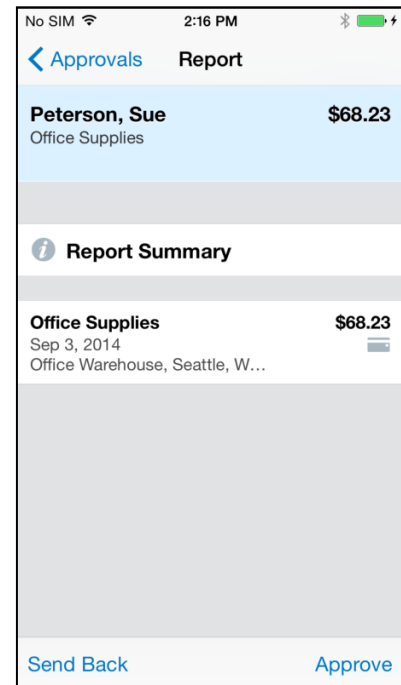
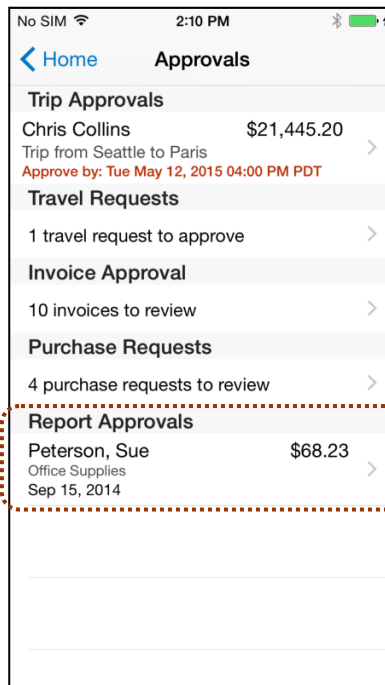


Expense Reports

Use **Approvals** on the home screen to view and approve expense reports (if you are a report approver).



- 1) On the home screen, tap **Approvals**.
- 2) On the **Approvals** screen, tap to open the desired expense report.
- 3) On the **Report** screen:
 - View the report details (receipts, expenses, etc.).
 - Tap **Approve** or **Send Back**.**NOTE:** If you tap **Send Back**, you must provide a comment.



NOTE: Depending on your configuration, you may be able to bypass any remaining approvers and send the expense report directly to Accounting Review. If so, when you select **Approve**, this menu appears. Tap:

- **Additional approver required** to approve the report and send the report to the next approver in the workflow.

- **Approve report** to approve the report and send it directly to Accounting Review.

Requests

Use **Approvals** on the home screen to view and approve requests (if you are a request approver).

1) On the home screen, tap **Approvals**.

2) On the **Approvals** screen, tap **Travel Requests**.

3) Tap to open the desired request.

4) On the **Requests** screen:

- View the request details (segments, expected expenses, etc.).
- Tap **Approve** or **Send Back**.
NOTE: If you send back, you must provide a comment.

Payment Requests (Invoice)

Use **Approvals** on the home screen to view and approve payment requests (if you are an approver).

- 1) On the home screen, tap **Approvals**.
 - 2) On the **Approvals** screen, tap **Invoice Approval**.
 - 3) On the **Invoice** screen, tap **Invoice Approval**.
 - 4) On the next screen, tap to open the desired payment request.
 - 5) On the **Invoice** screen:
 - View the request details (summary, images, vendor info, etc.).
 - Tap **Approve** or **Send Back**.
- NOTE:** If you send back, you must provide a comment.

Purchase Requests (Invoice)

- 1) On the home screen, tap **Approvals**.
 - 2) On the **Approvals** screen, tap **Purchase Requests**.
 - 3) On the **Purchase Requests** screen, tap **Purchase Request Approval**.
 - 4) On the next screen, tap to open the desired payment request.
 - 5) On the **Purchase Request** screen:
 - View the request details (summary, images, distributions, etc.).
 - Tap **Approve** or **Send Back**.
- NOTE:** If you send back, you must provide a comment.

Settings

Use settings for the following:

- Save your user name
- Automatically sign in
- Turn on Touch ID
- Send an error log to Concur
- Clear the cache
- Reset to the factory defaults
- Sign out

