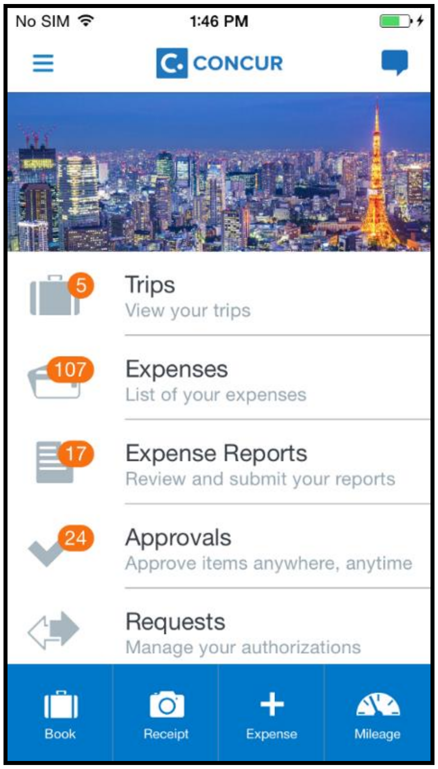
Introduction to........

Concur's mobile app – iPhone®

Version 9.52 – February 9 2018

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.

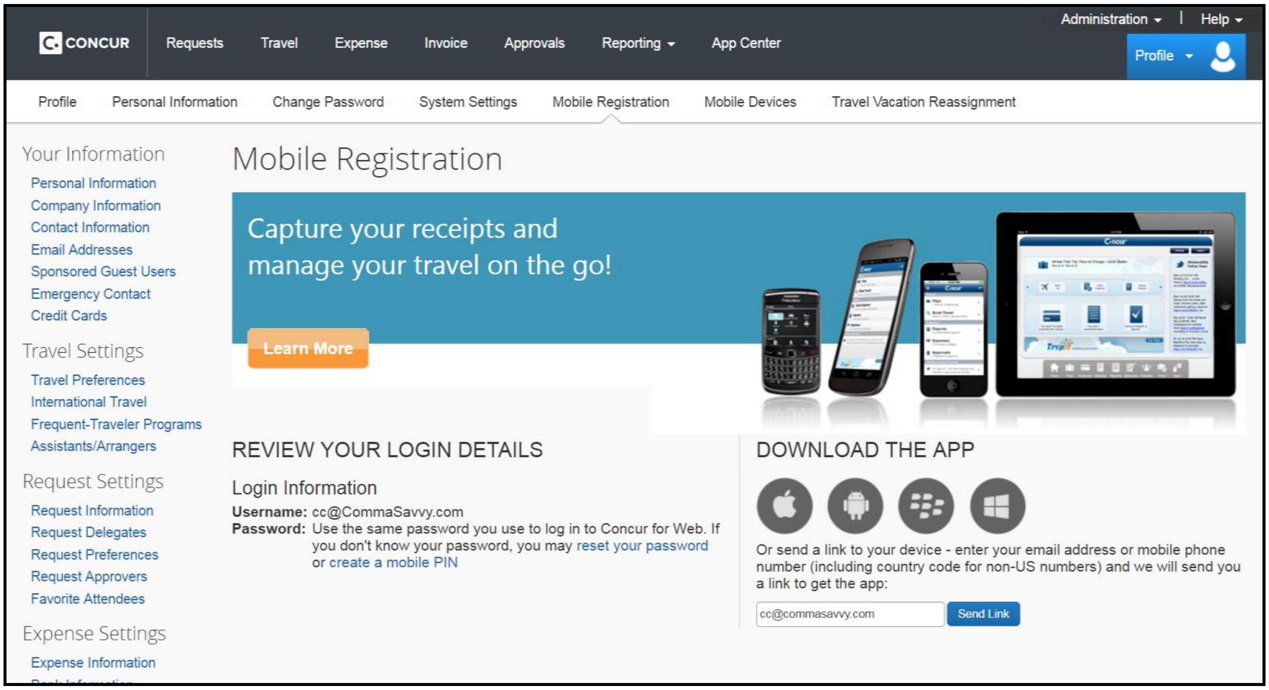
If you are an approver, you can approve expense reports, requests, payment requests (Invoice), etc.

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 their 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.)

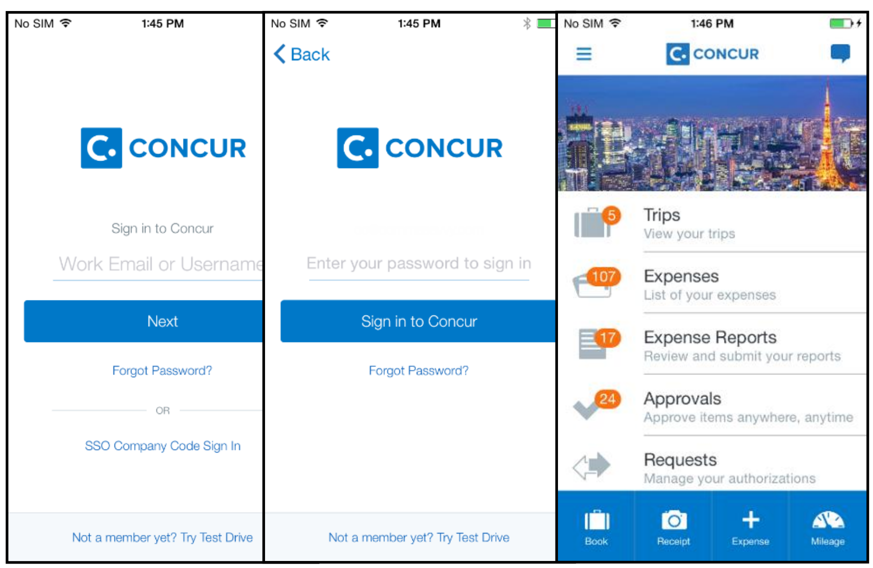


Sign In

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

– or –

Tap SSO Company Code Sign In if your company uses SSO to access the Concur mobile app.



NOTE: Concur will not let you sign in if your device does not have a passcode or if your device has been compromised (modified to remove manufacturer restrictions).

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

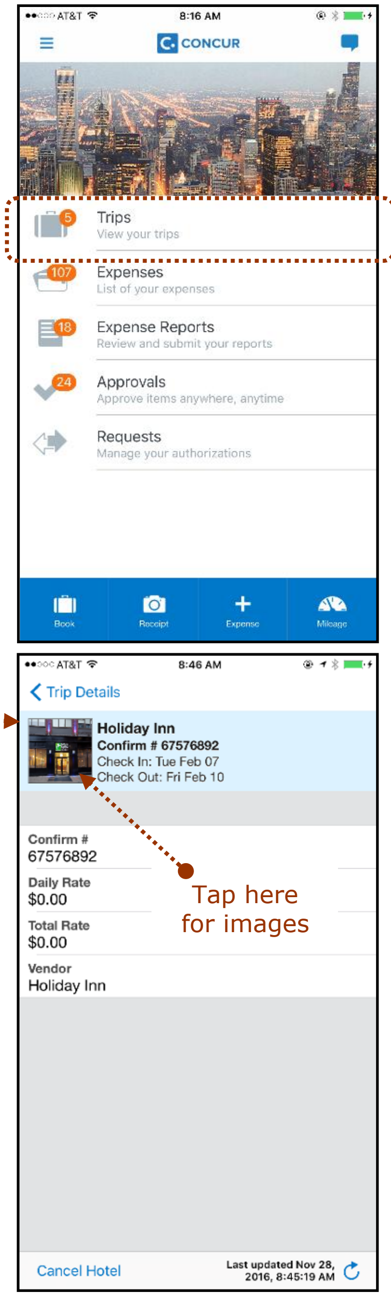
Permissions

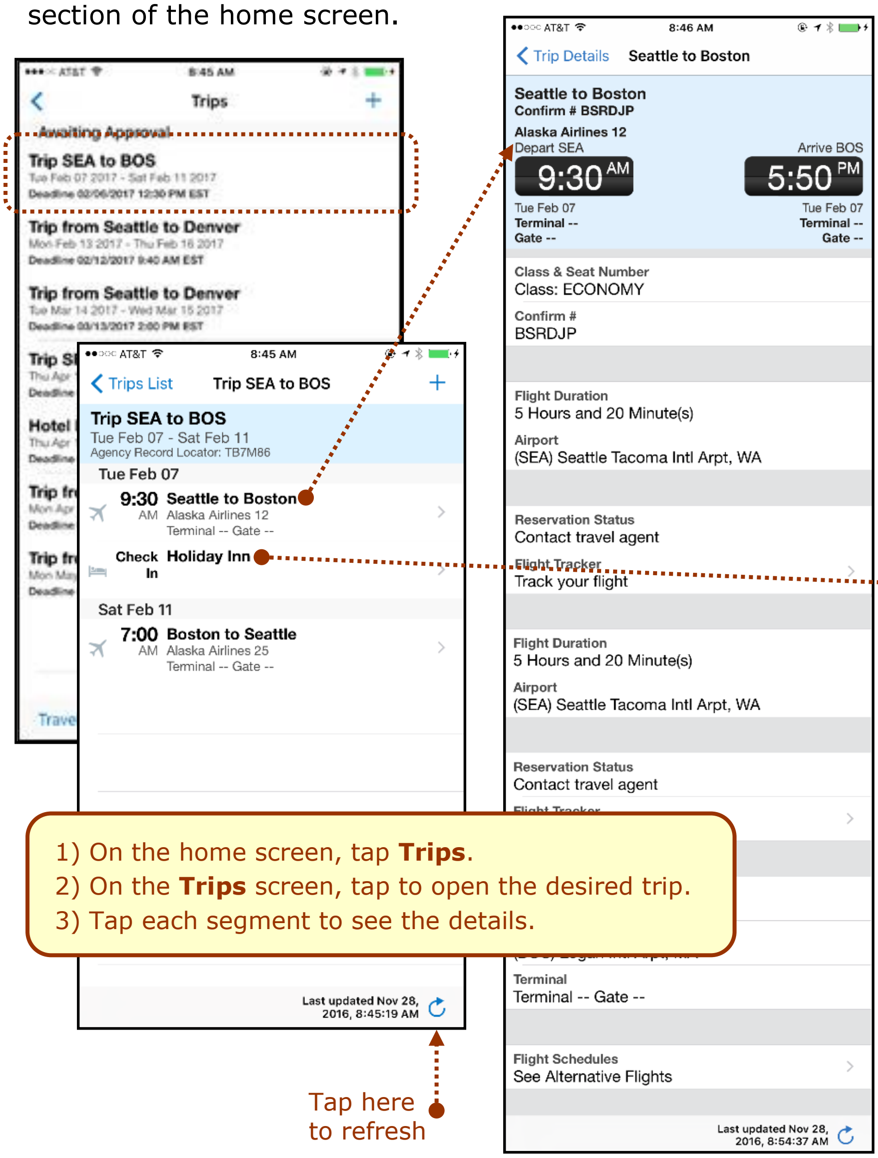
The options that are available on the home screen vary depending on the user's permissions. For example, users who can access Expense on the web version of Concur can access Expense in the mobile app. The same applies to Travel, Invoice, and Request.

Trips

View an Itinerary

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



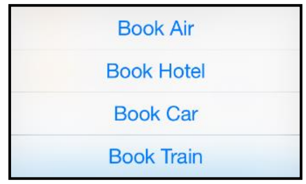


1) On the home screen, tap **Trips**.
2) On the **Trips** screen, tap to open the desired trip.
3) Tap each segment to see the details.

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:



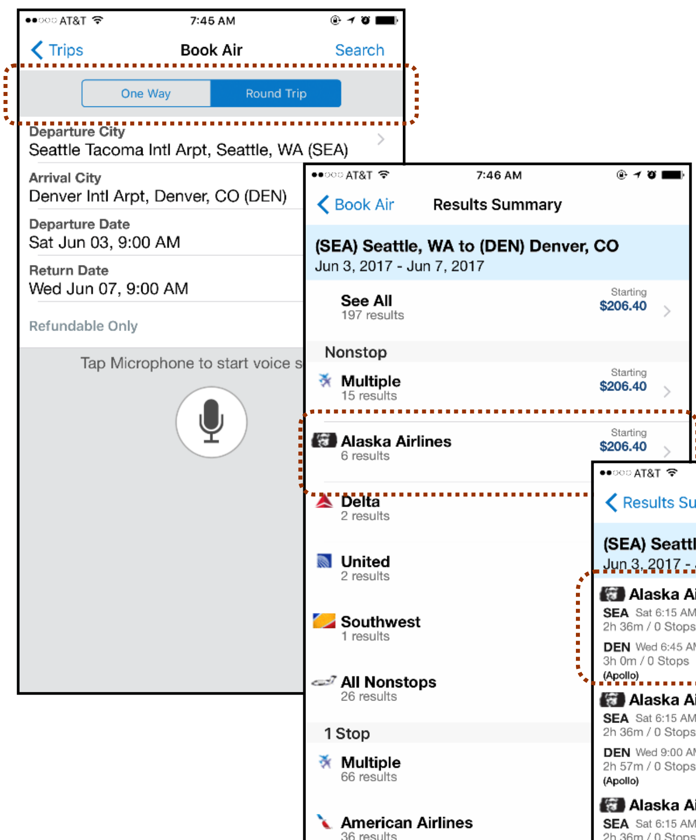
- On the home screen, tap:
  -  (lower-left corner) – or –
  -  (upper-left corner) and then **Book Travel**

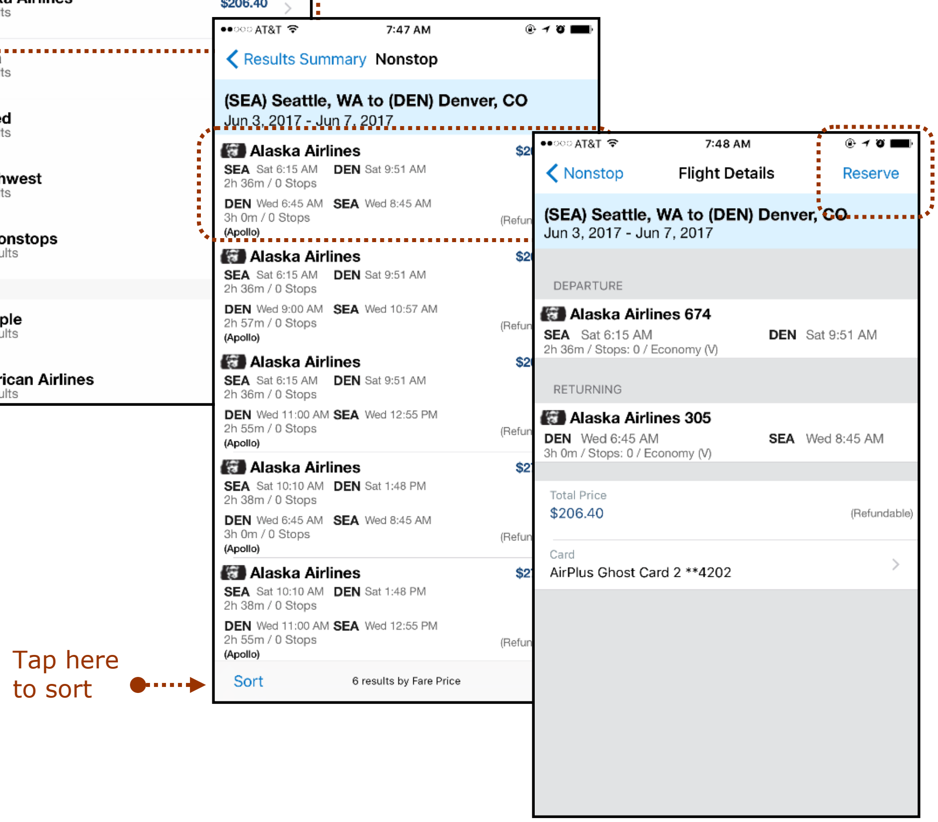
– or –

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

Then:

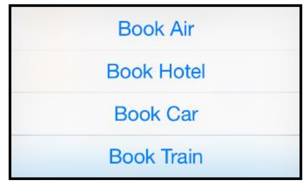
1) On the **Book Air** screen:
   - Tap **One Way** or **Round Trip**.
   - Enter the search criteria.
   - Tap **Search** (upper-right corner).
2) On the **Results Summary** screen, tap the desired carrier.
3) On the next screen, tap the desired flight.
4) On the **Flight Details** screen:
   - Review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





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 –

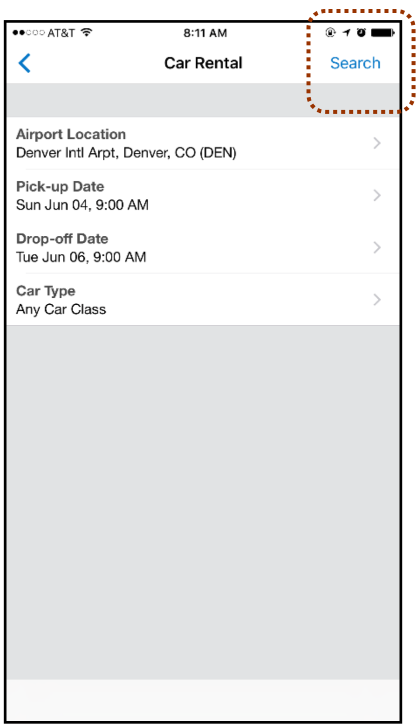
- On the **Trips** screen, tap:
  - ♦ **Book a Trip** – or –
  - ♦ (upper-right corner)

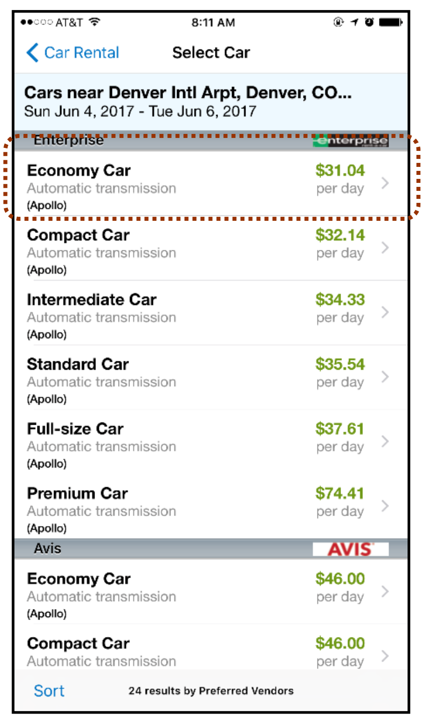
– or –

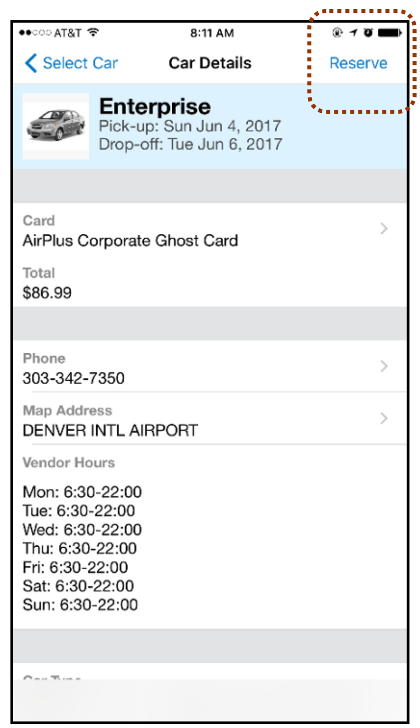
- To add a car to an existing itinerary, with the itinerary open, tap (upper-right corner).

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**

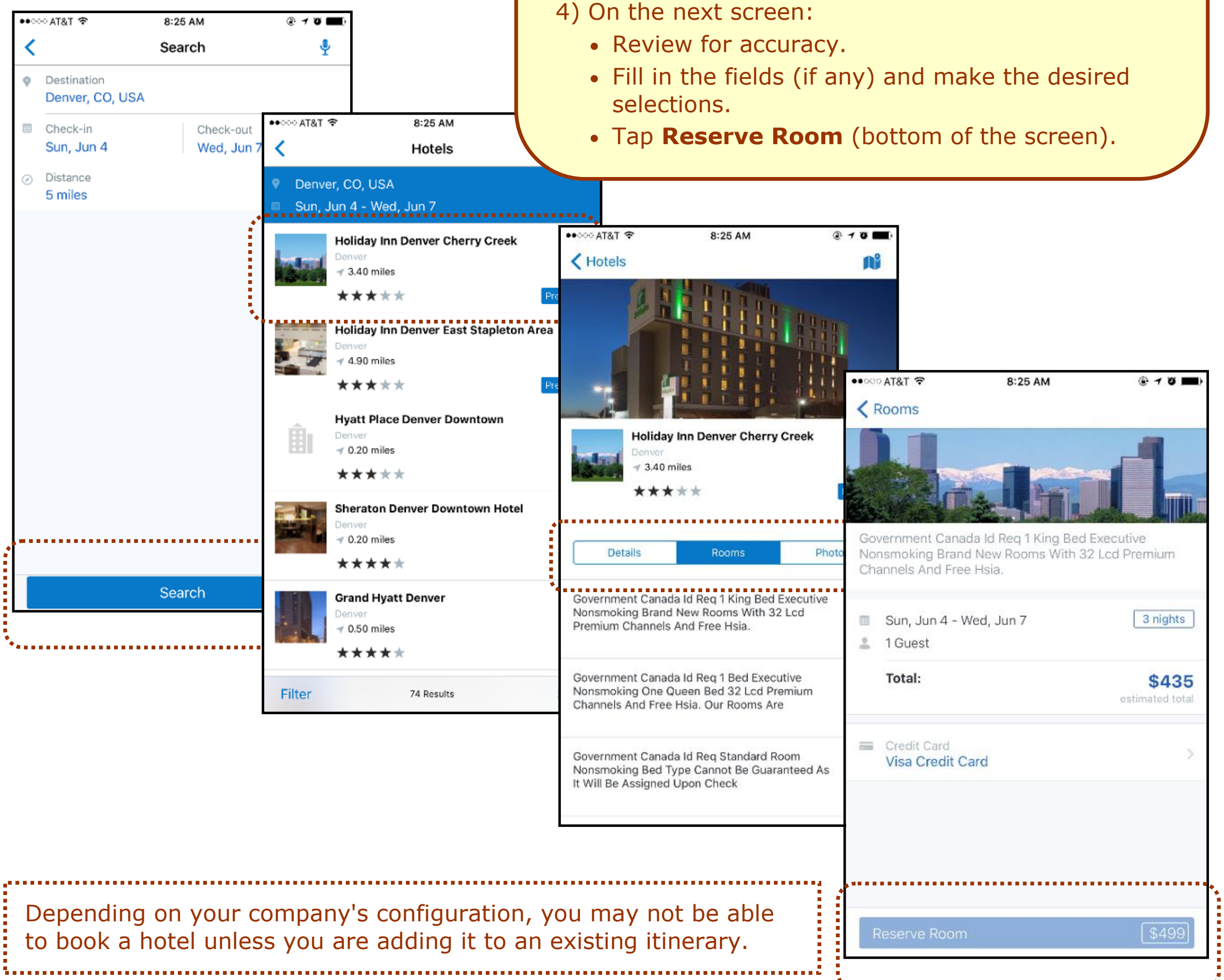
  – or –

- 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:
1) On the **Search** screen:
   - Enter the search criteria.
   - Tap **Search** (bottom of the screen).
2) On the **Hotels** screen, tap the desired hotel.
3) On the next screen, tap **Rooms** tab.
4) On the next screen:
   - Review for accuracy.
   - Fill in the fields (if any) and make the desired selections.
   - Tap **Reserve Room** (bottom of the screen).

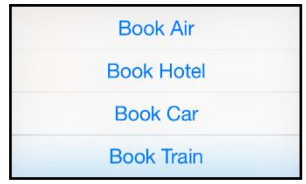


Depending on your company's configuration, you may not be able to book a hotel unless you are adding it to an existing itinerary.

Book Amtrak Direct Connect

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

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



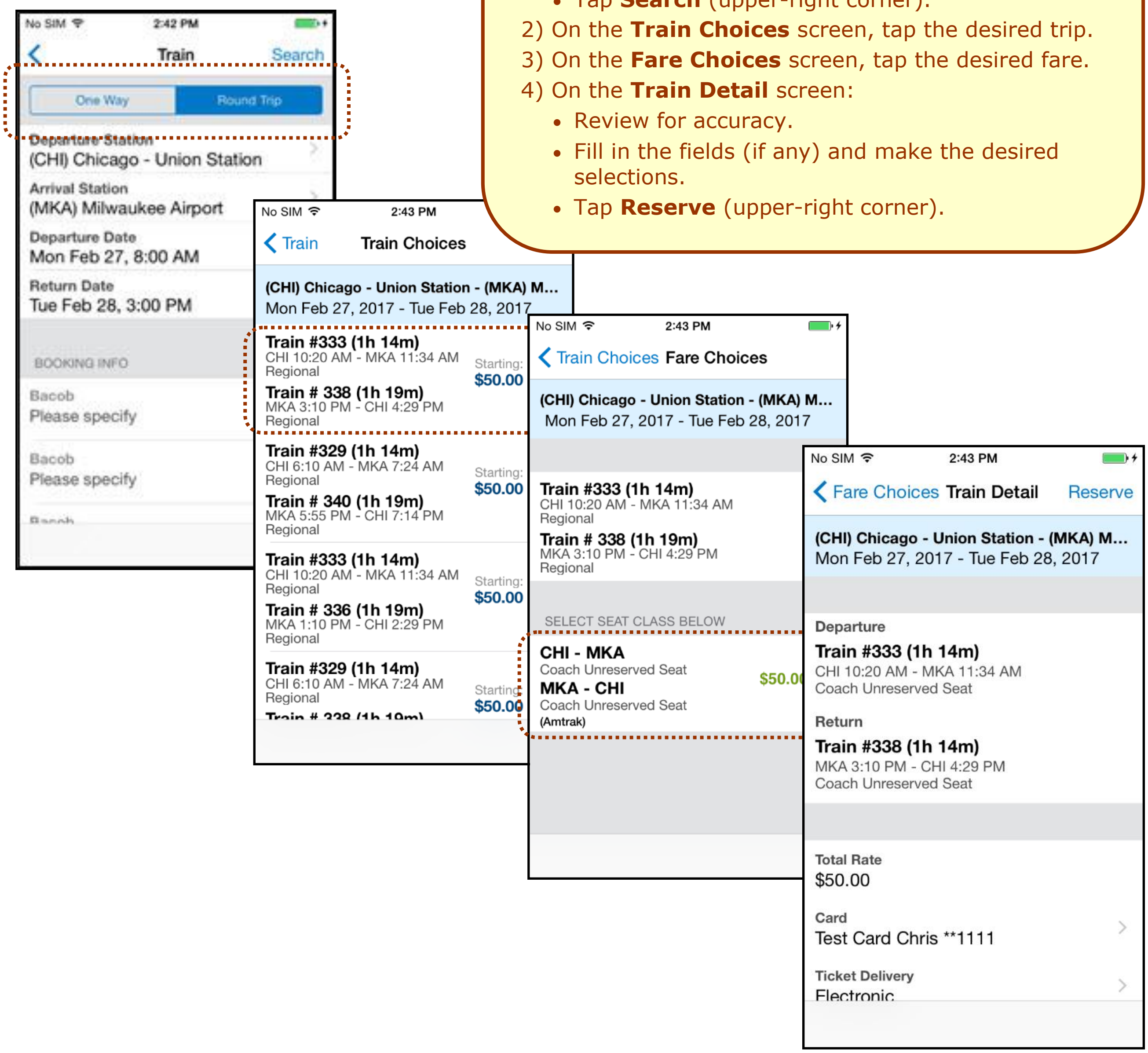
- On the home screen, tap:
  - ♦ Book (lower-left corner) – or –
  - ♦ (upper-left corner) and then **Book Travel**

– or –

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

Then:

1) On the **Train** 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 Using Voice

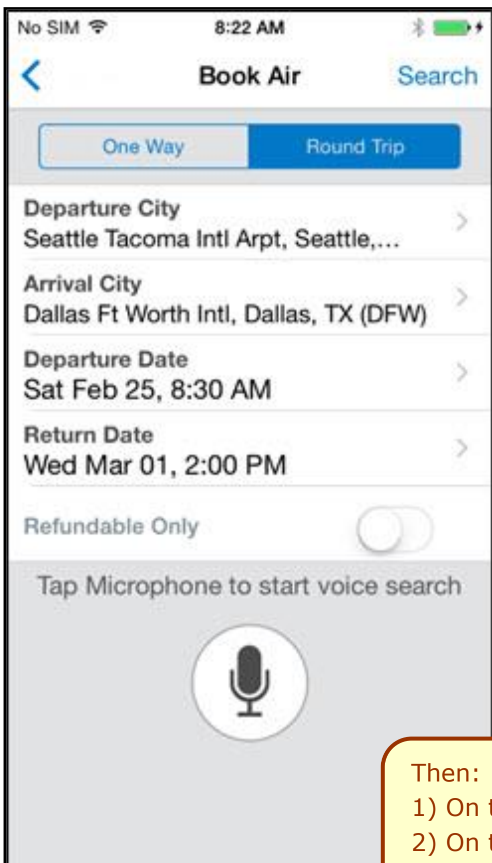
You can book a flight using voice.

To access the menu:

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

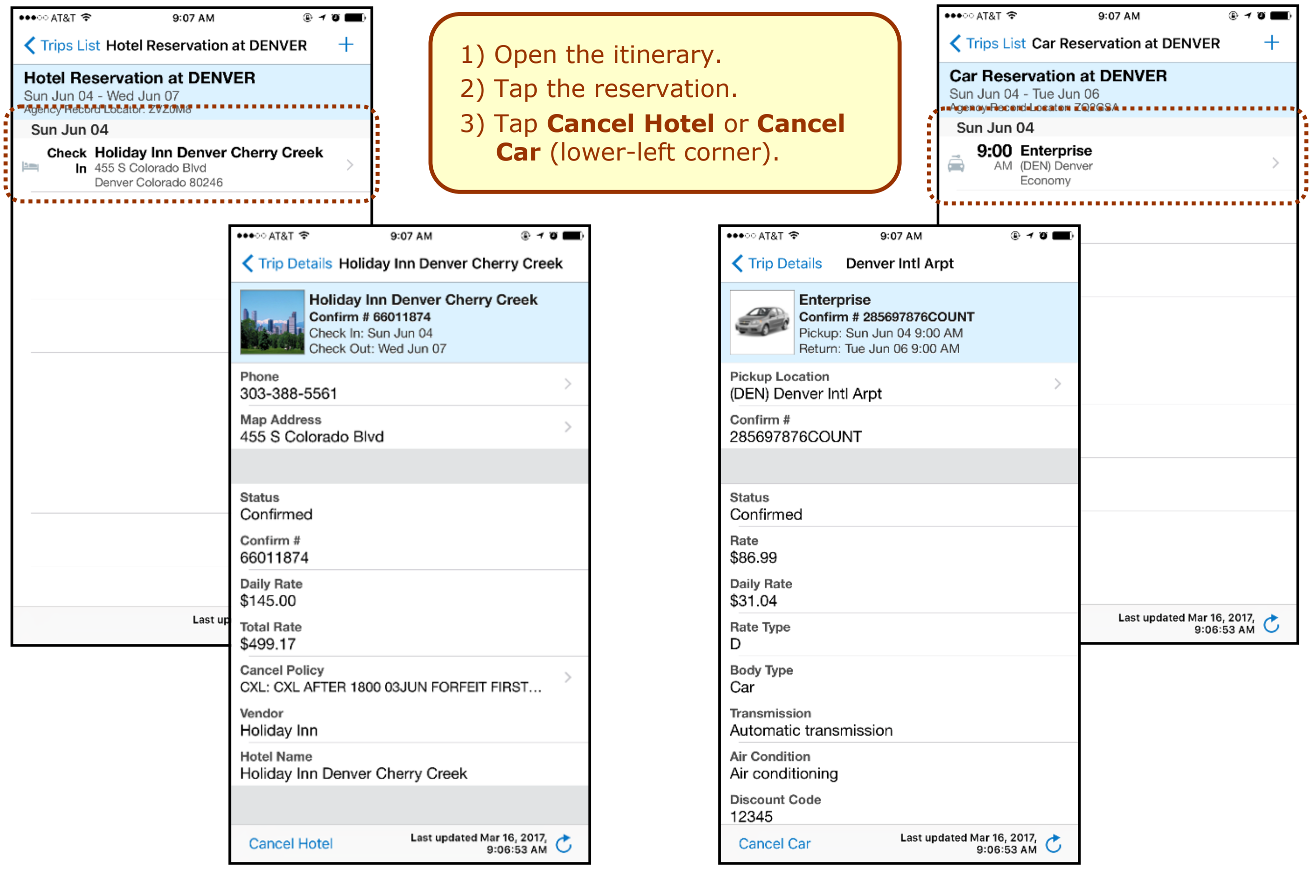
  – or –
- On the **Trips** screen, tap:
  - ♦ **Book a Trip** – or –
  - ♦ (upper-right corner)

  – or –
- With an itinerary open, tap (upper-right corner).



Then:
1) On the menu, tap **Book Air**.
2) On the bottom of the screen, tap the microphone.
3) Follow the instructions on the screen.

Cancel a Hotel or Rental Car Reservation

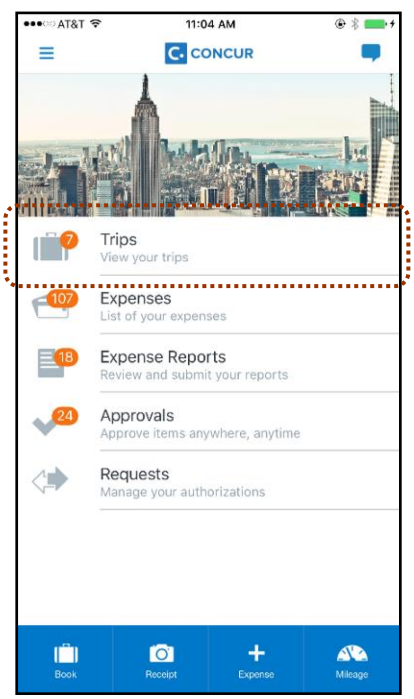


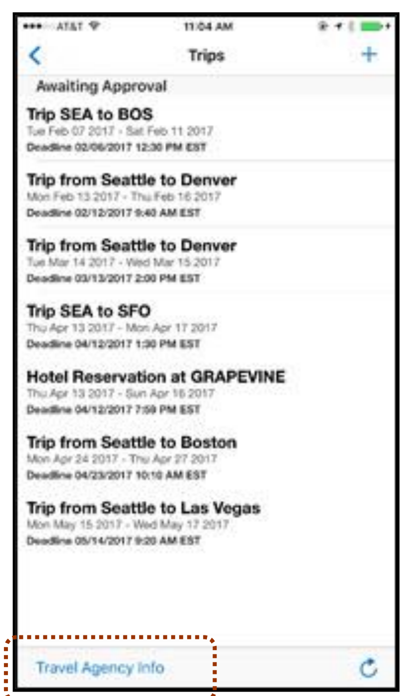
1) Open the itinerary.
2) Tap the reservation.
3) Tap **Cancel Hotel** or **Cancel Car** (lower-left corner).

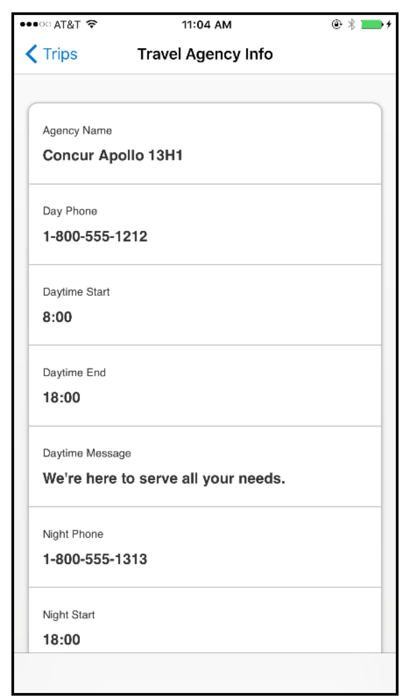
View Agency Information

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**.



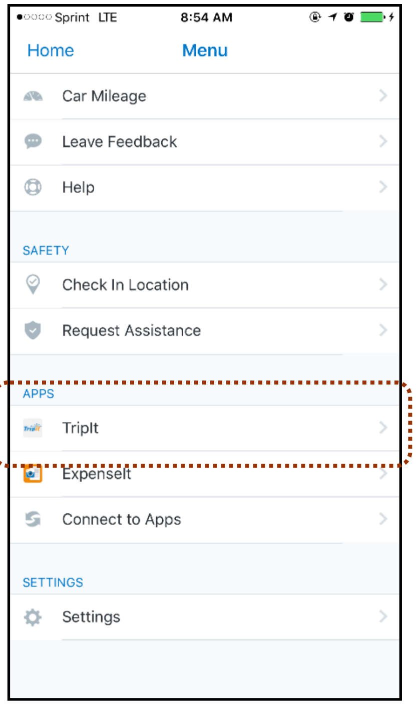


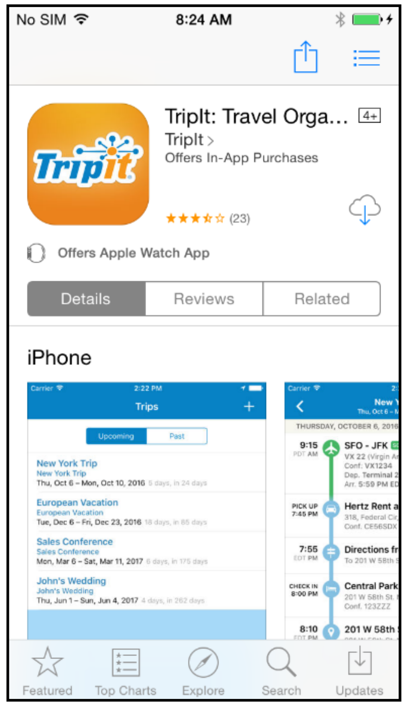


Other Apps

Depending on your company's configuration, TripIt and other apps may be available for download.

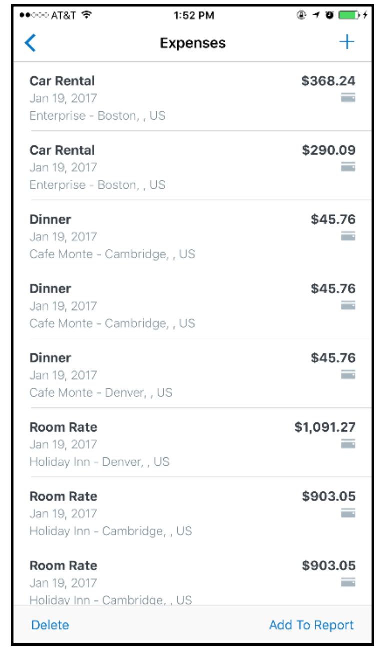
1) On the home screen, tap  (upper-left corner).
2) On the **Menu** screen, tap the desired option and download.





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:

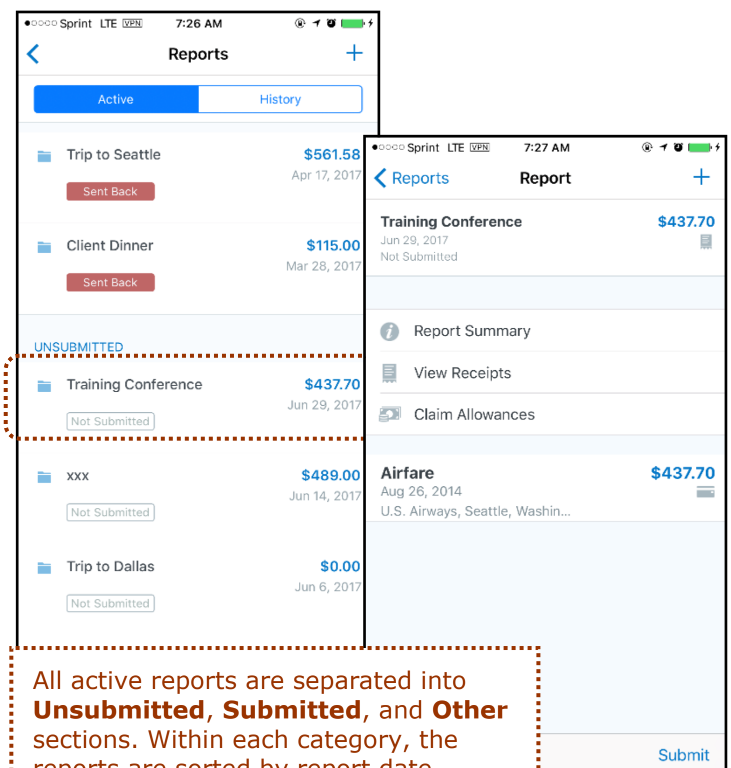
- Add, view, edit, and delete *mobile* expenses. Mobile expenses are designed to be quick and easy.
  - ♦ To make more extensive features like itemizations and attendees, either:
    - Add the *mobile* expense to an expense report then edit.
    - Create the expense on an open expense report and then 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.

Expense Report List (Active and History Sections)

On the home screen, tap **Expense Reports** to access the list of expense reports. On the **Reports** screen, you can view up to 100 expense reports in each of the **Active** or **History** sections. In the **Active** section, you can:

- View unsubmitted, submitted, and returned reports
- Create a new report
- Copy reports
- Delete unsubmitted reports
- View red and yellow earmarked reports flagged for exceptions
- View the name, status, date, and amount of each report



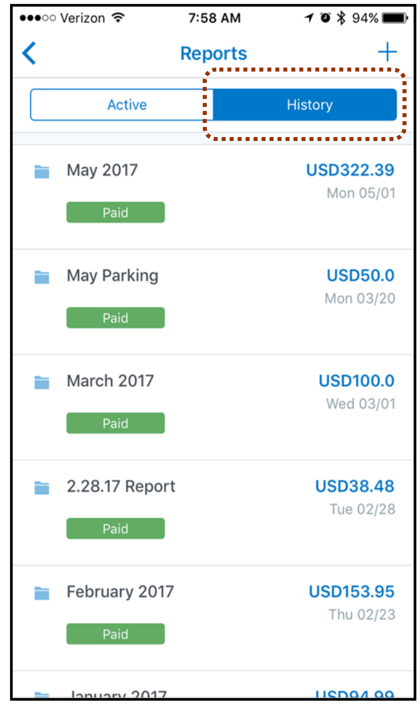
All active reports are separated into **Unsubmitted**, **Submitted**, and **Other** sections. Within each category, the reports are sorted by report date.

You can open an existing expense report and:

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

In the **History** section, you can:

- View reports that have been approved and sent for payment
- View red and yellow earmarked reports flagged for exceptions
- Copy reports

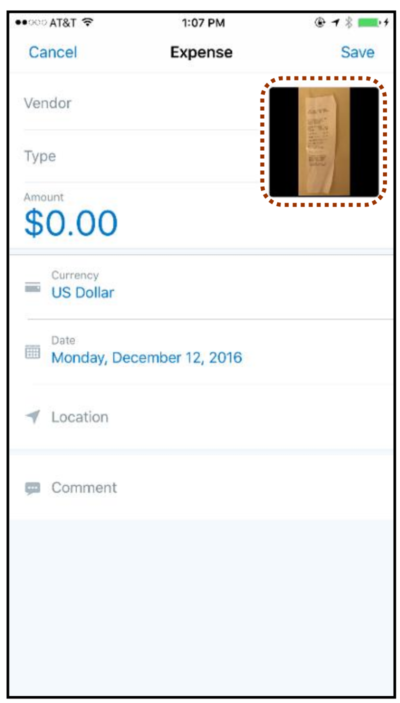


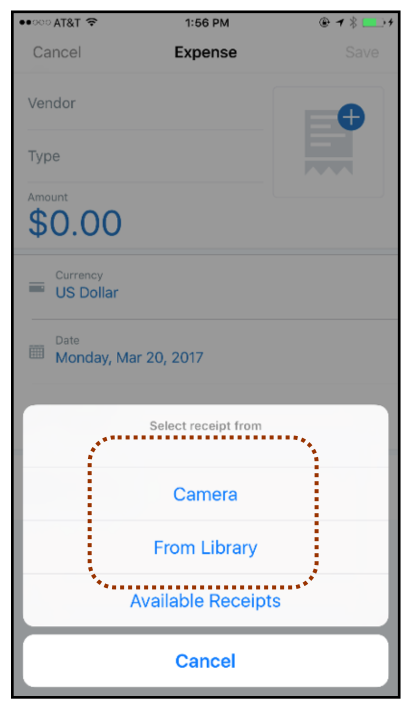
Create a Mobile Expense

To create a *mobile* expense:

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

Then:
1) On the **Expense** screen, fill in the fields and make the desired selections.
2) Tap the receipt icon.
3) Take a picture of the receipt or grab an existing image from **From Library** or from your **Available Receipts**.
4) Tap **Save**.



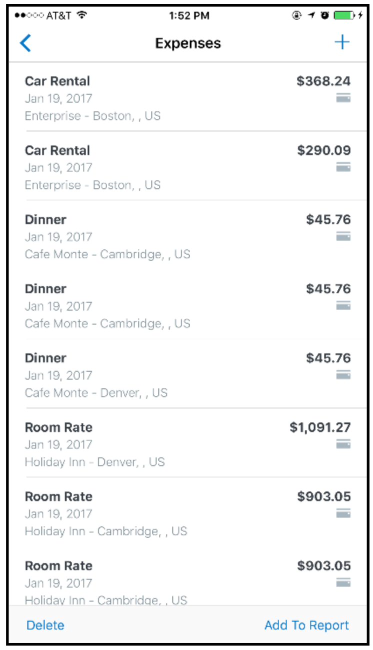


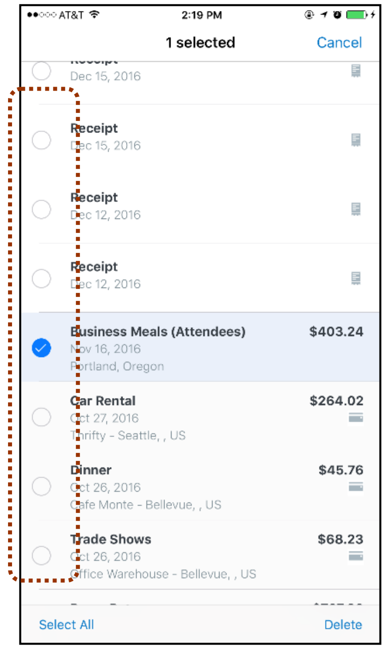
Delete an Expense From the Expenses Screen

You can delete one or more *mobile* expenses from the **Expenses** screen.

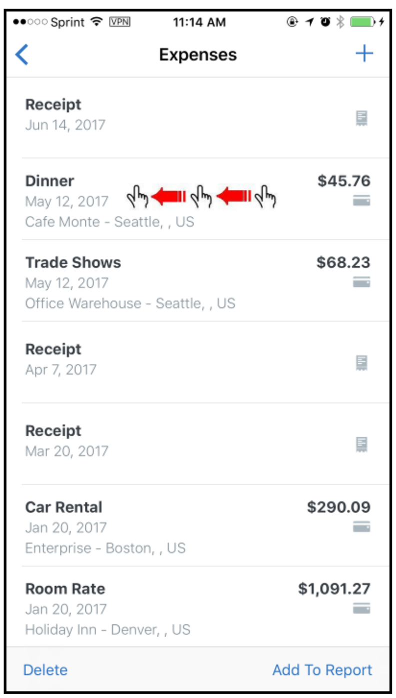
NOTE: To delete a *card* transaction, use the web version of Expense - if your company allows you to delete card transactions.

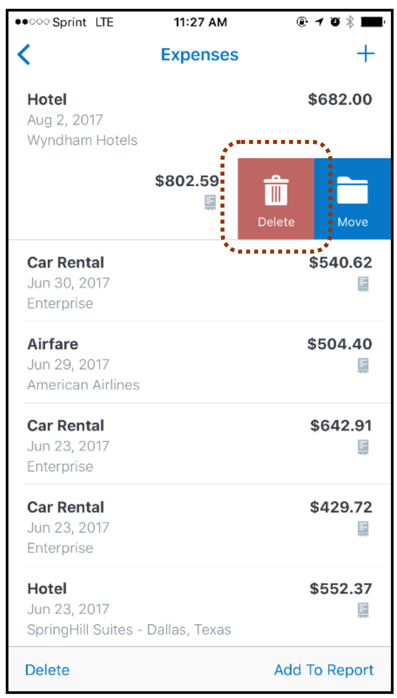
1) On the **Expenses** screen, tap **Delete** (lower-left corner). The selection circles appear.
2) Tap one or more selection circles.
3) Tap **Delete** (lower-right corner).





DELETE A SINGLE MOBILE EXPENSE





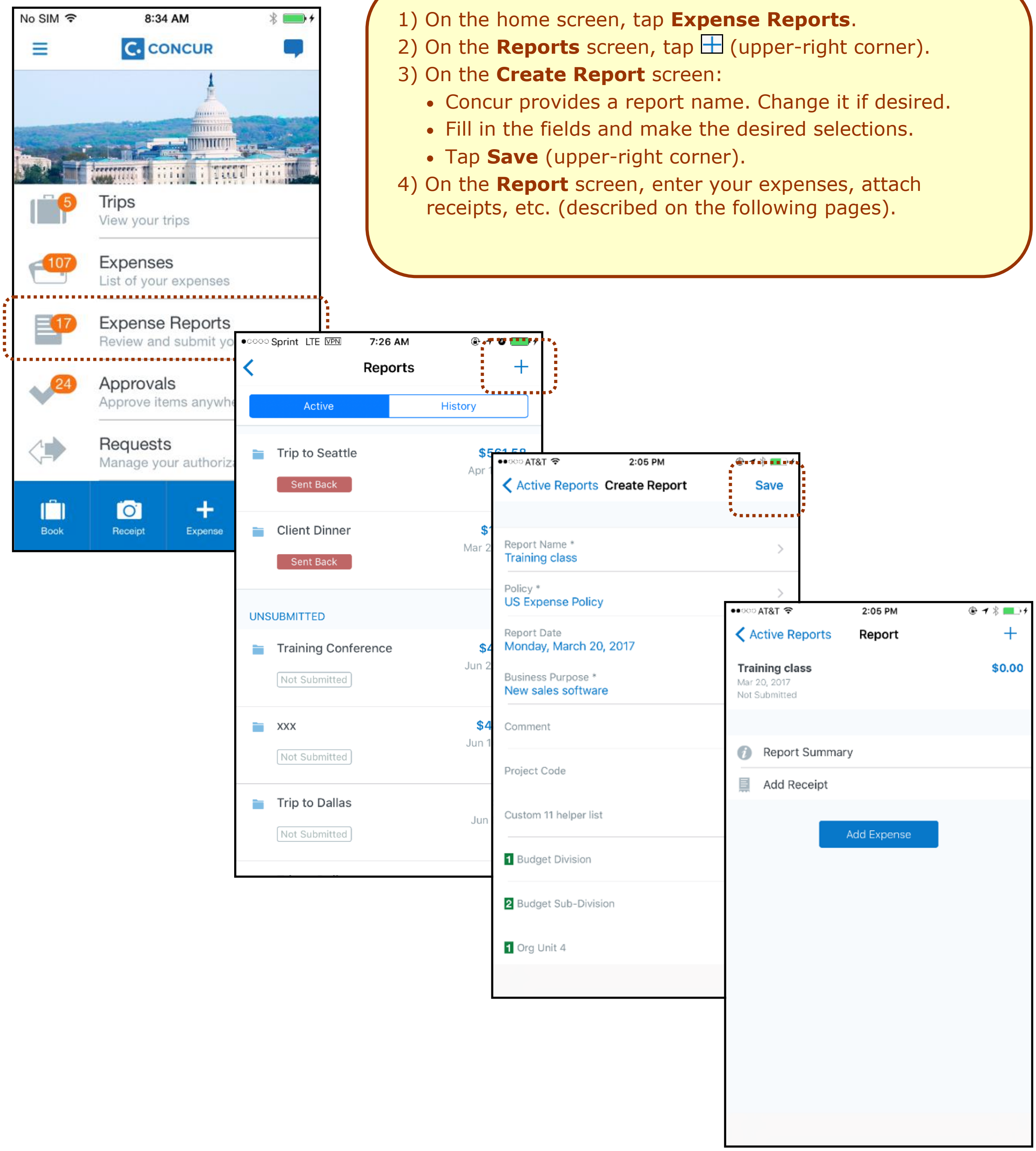
1) On the **Expenses** screen, swipe the desired expense to the left.
2) Tap **Delete**.

Create a New Expense Report

You can create a new report:

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

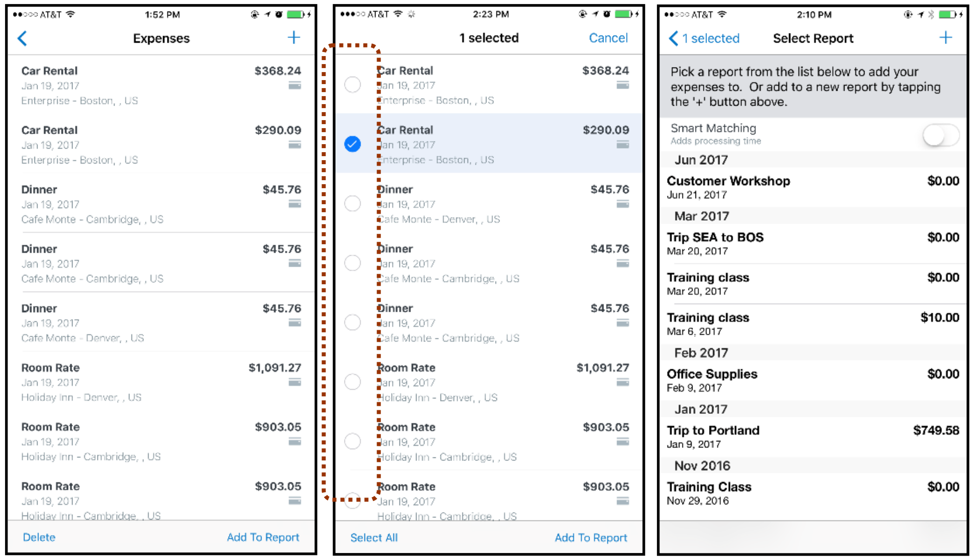
1) On the home screen, tap **Expense Reports**.
2) On the **Reports** screen, tap ⊞ (upper-right corner).
3) On the **Create Report** screen:
   - Concur provides a report name. Change it if desired.
   - Fill in the fields and make the desired selections.
   - Tap **Save** (upper-right corner).
4) On the **Report** screen, enter your expenses, attach receipts, etc. (described on the following pages).



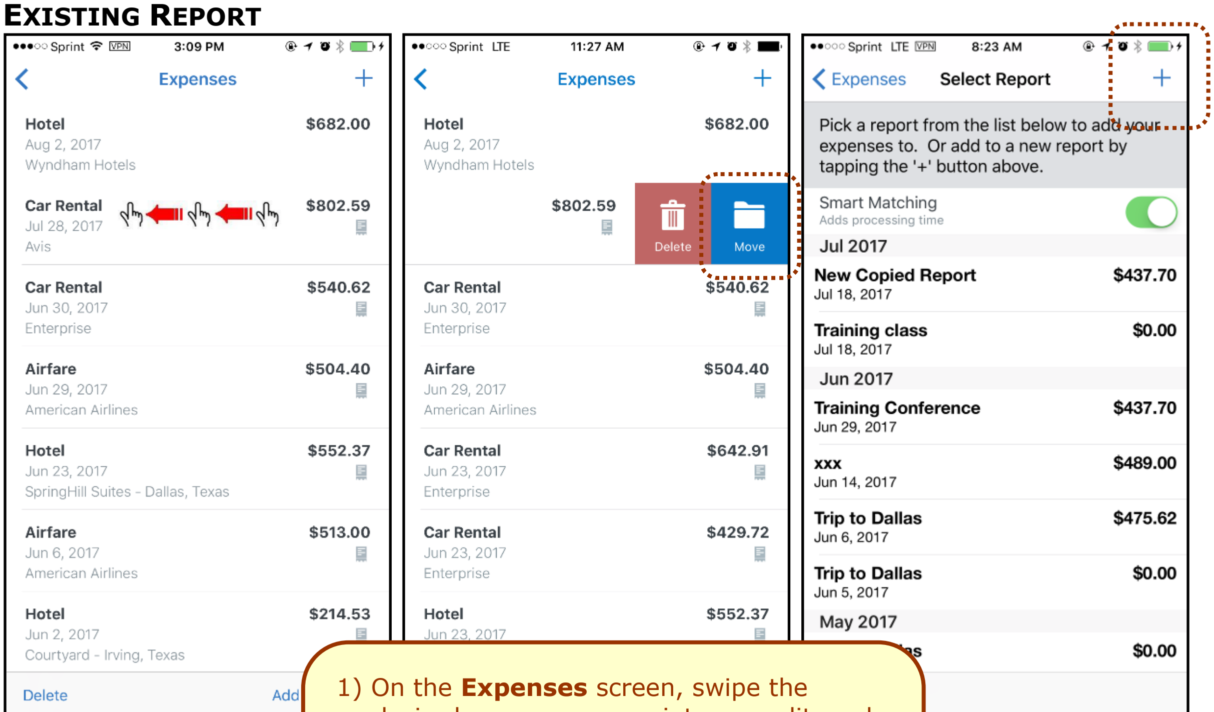
Move Expenses From the Expenses Screen to an Expense Report

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

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.

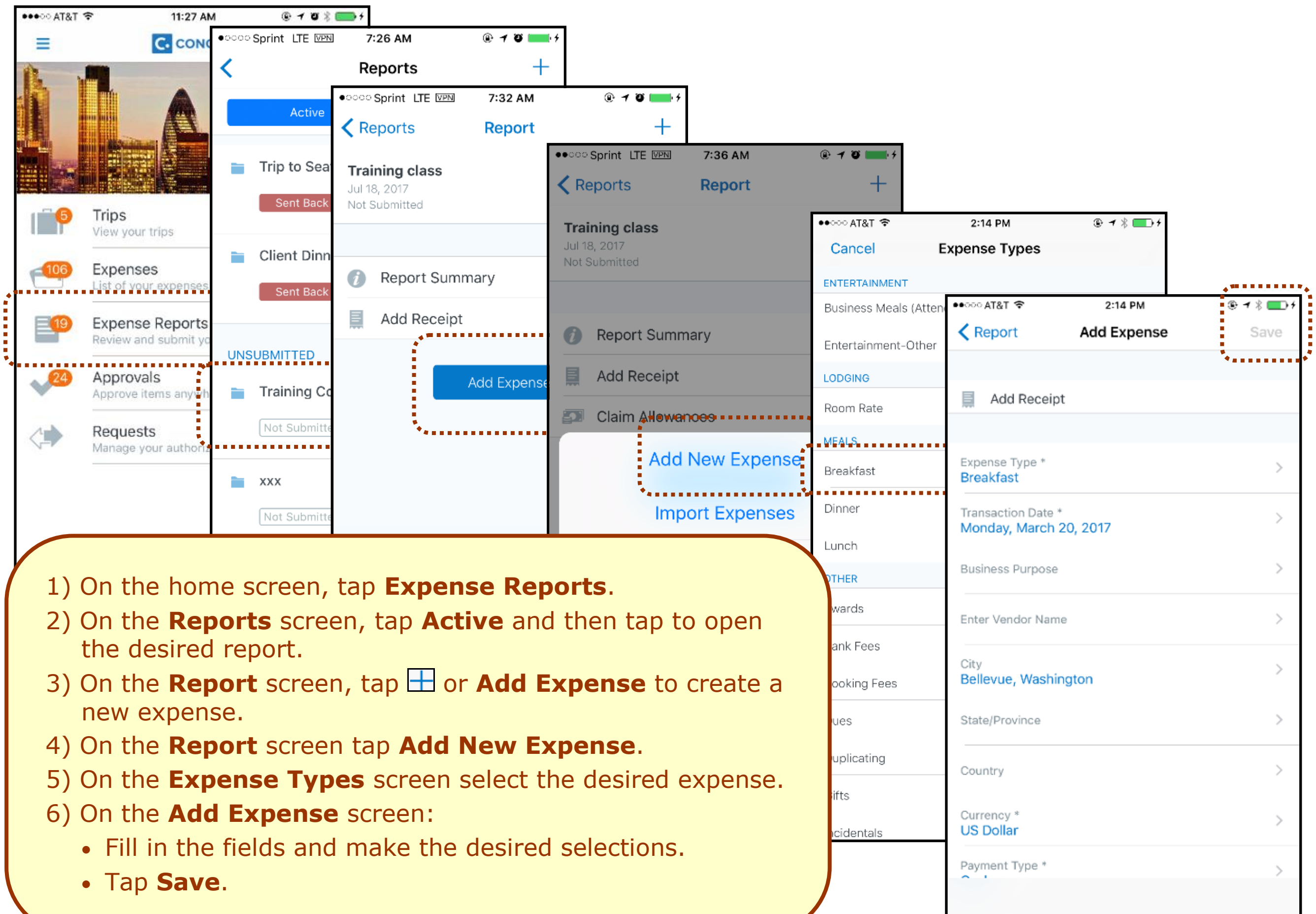


Move a Single Mobile Expense, E-Receipt, or Credit Card Charge to a New or Existing Report



1) On the **Expenses** screen, swipe the desired expense, e-receipt, or credit card charge to the left.
2) Tap **Move.**
3) On the **Select Report** screen, tap the desired report or tap the + (upper-right corner) to create a new report.

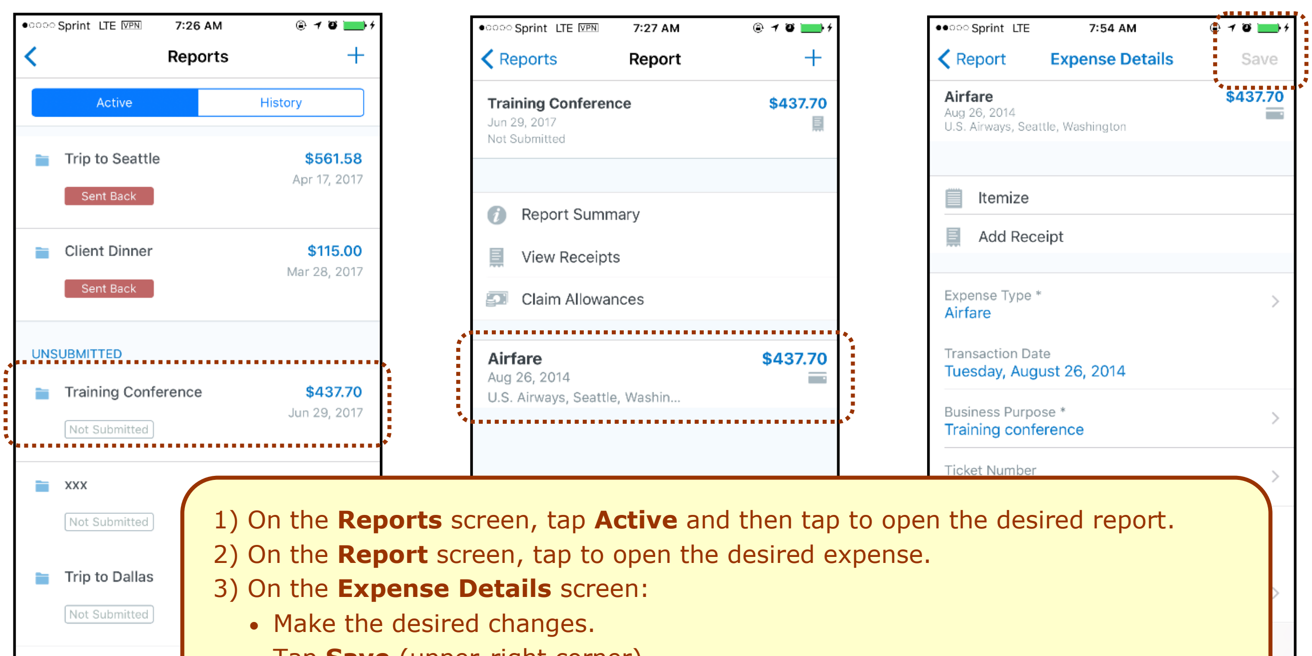
Create an Expense With an Open Expense Report



1) On the home screen, tap **Expense Reports**.
2) On the **Reports** screen, tap **Active** and then tap to open the desired report.
3) On the **Report** screen, tap ⊞ or **Add Expense** to create a new expense.
4) On the **Report** screen tap **Add New Expense**.
5) On the **Expense Types** screen select the desired expense.
6) On the **Add Expense** screen:
   - Fill in the fields and make the desired selections.
   - Tap **Save**.

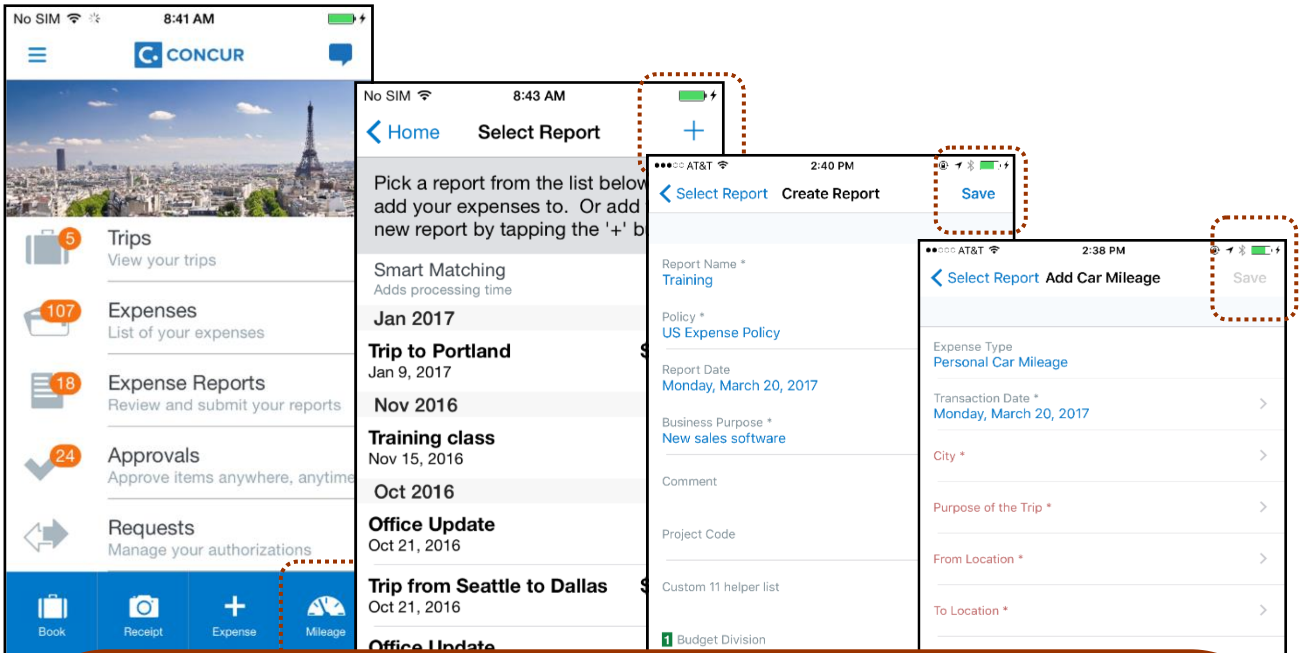
Edit an Expense on an Expense Report

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



1) On the **Reports** screen, tap **Active** and then tap to open the desired report.
2) On the **Report** screen, tap to open the desired expense.
3) On the **Expense Details** screen:
   - Make the desired changes.
   - Tap **Save** (upper-right corner).

Add a Car Mileage (or Km) Expense–Manually



1) On the home screen, tap  (lower-right corner).

   NOTE: The **Mileage** icon ***only*** appears if your company has the Personal Car Mileage feature activated and when you have registered a personal car on the **Profile > Profile Settings > Personal Car** page. This icon does not appear for company cars.

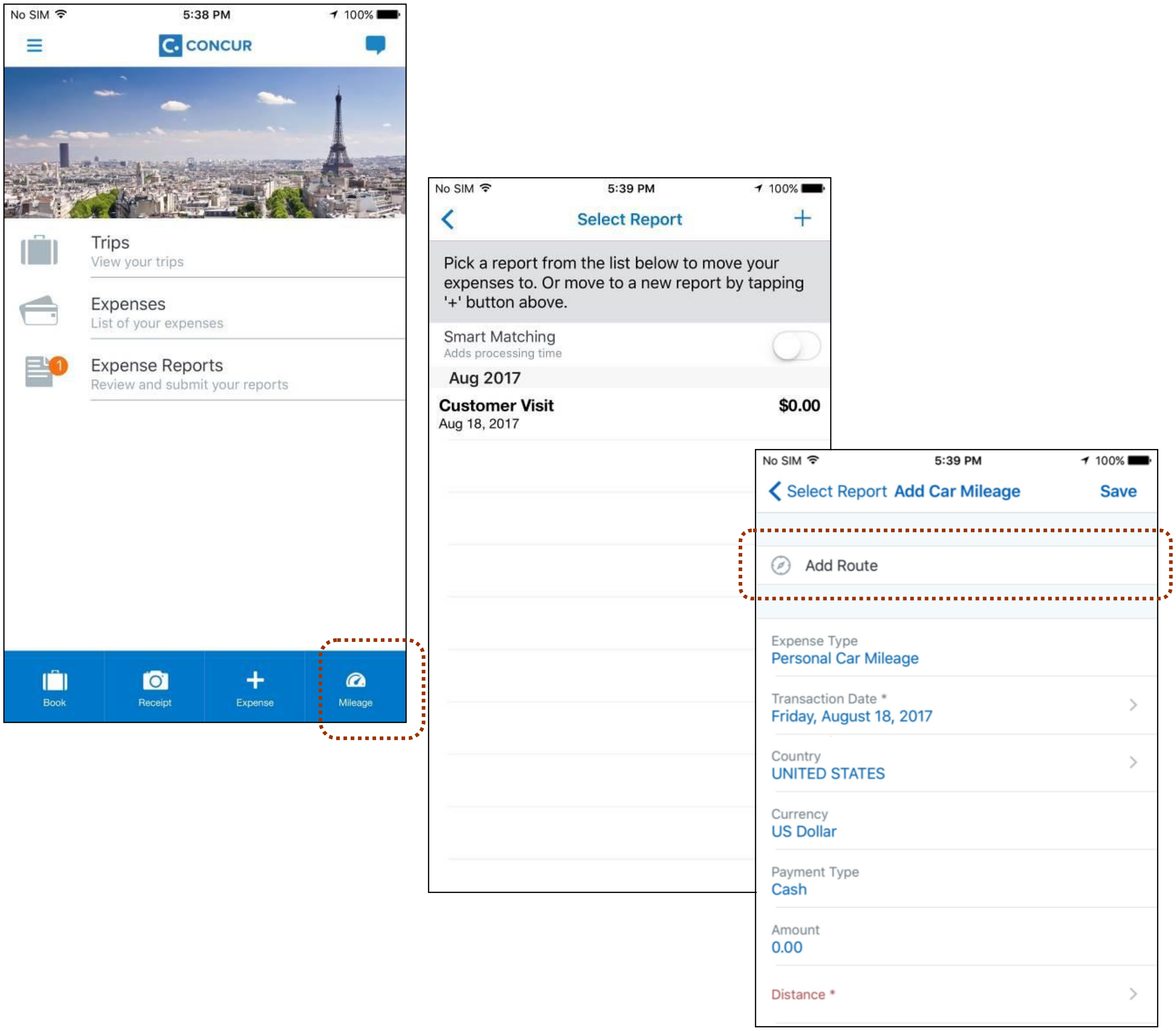
2) On the **Select Report** screen, either tap the desired expense report or tap ⊞ (upper-right corner) to create a new report.

3) On the **Create Report** screen
   - Fill in the fields and make the desired selections.
   - Tap **Save** (upper-right corner).

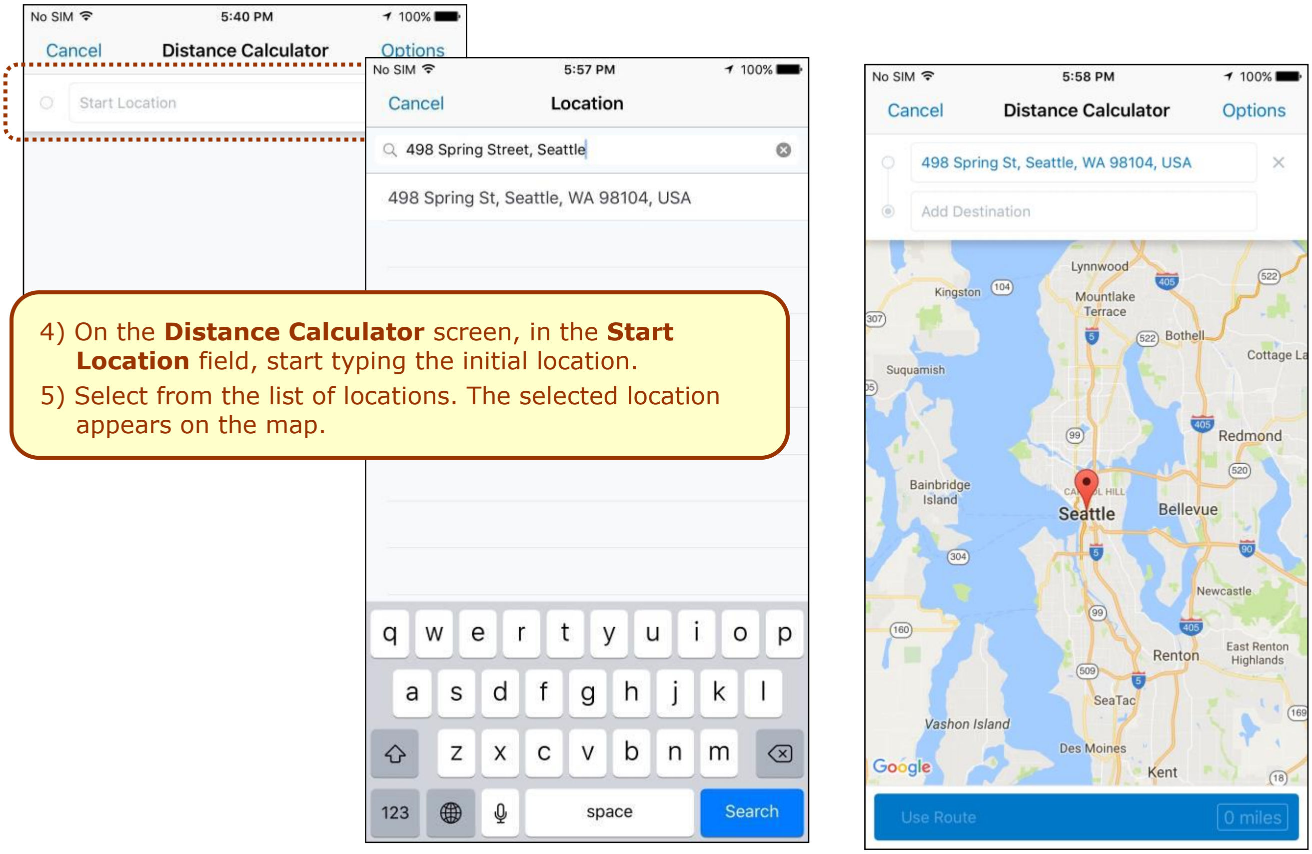
4) On the **Add Car Mileage** screen:
   - Fill in the fields and make the desired selections.
     NOTE: Concur calculates the amount based on the distance and the company's mileage rate.
   - Tap **Save** (upper-right corner).

Add a Car Mileage (or Km) Expense–Mileage Calculator

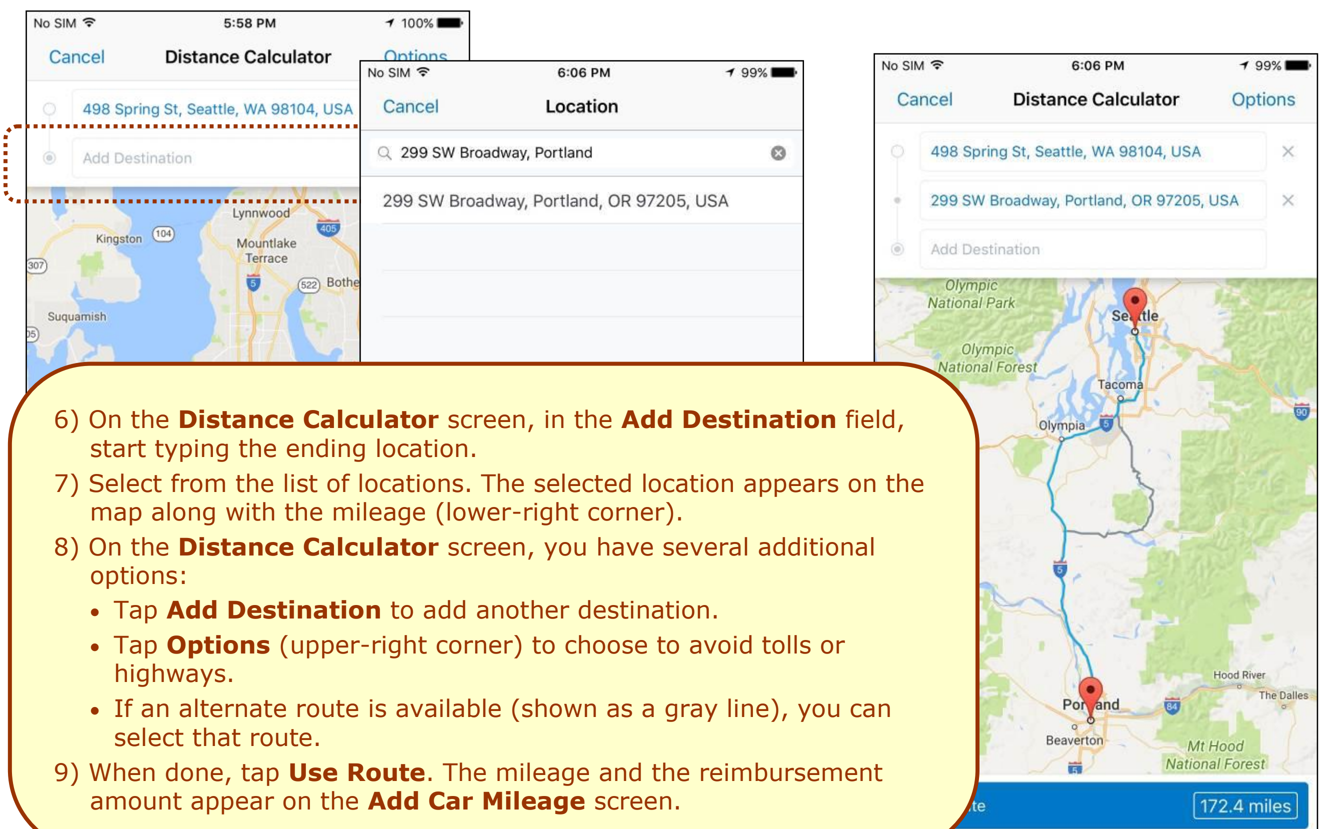
The Mileage Calculator can be used for both personal and company car mileage. The example below shows personal mileage, using the **Mileage** icon on the home screen. For company car mileage, the user creates an expense as usual and selects the *Company Car Mileage* (or something similar) expense type. After that, both types work the same way – as shown below.



1) On the home screen, tap the **Mileage** icon (lower-right corner).
   NOTE: This icon appears only if the company's configuration includes personal car mileage and if the user has defined a personal car in Profile.
2) On the **Select Report** screen, either:
   - Add to an existing report by selecting the report.
     – or –
   - Tap **+** (upper-right corner) to create a new report. Complete the steps to create the new report.
3) On the **Add Car Mileage** screen, tap **Add Route**.

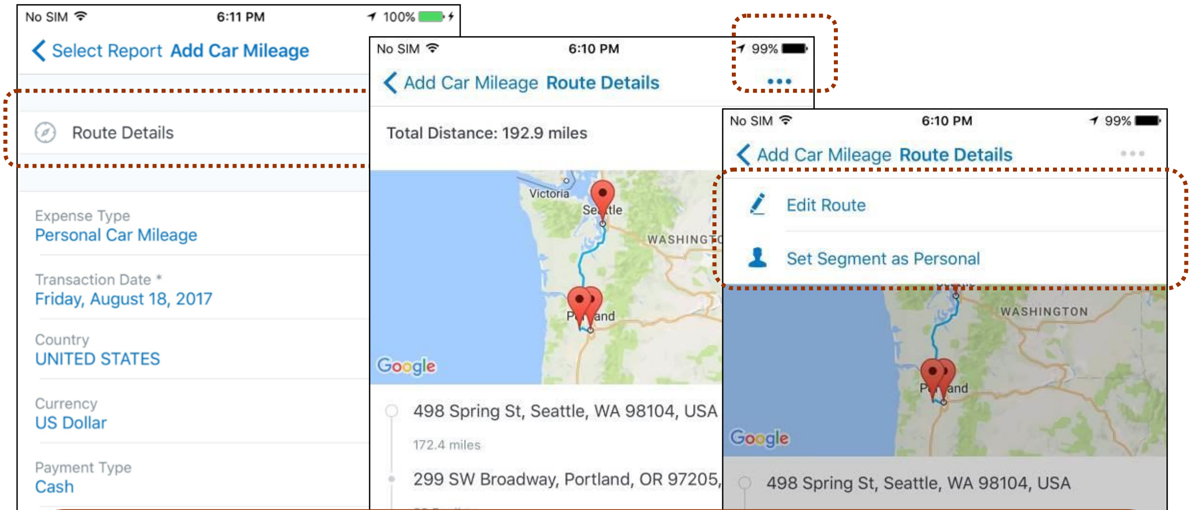


4) On the **Distance Calculator** screen, in the **Start Location** field, start typing the initial location.
5) Select from the list of locations. The selected location appears on the map.

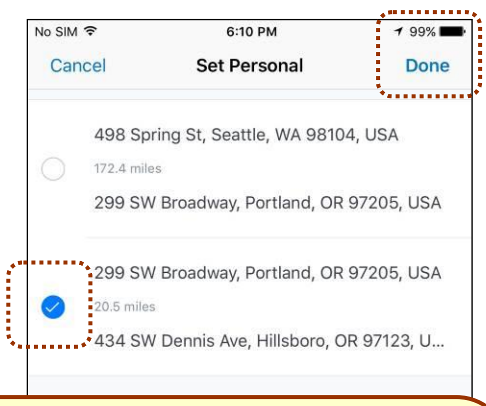


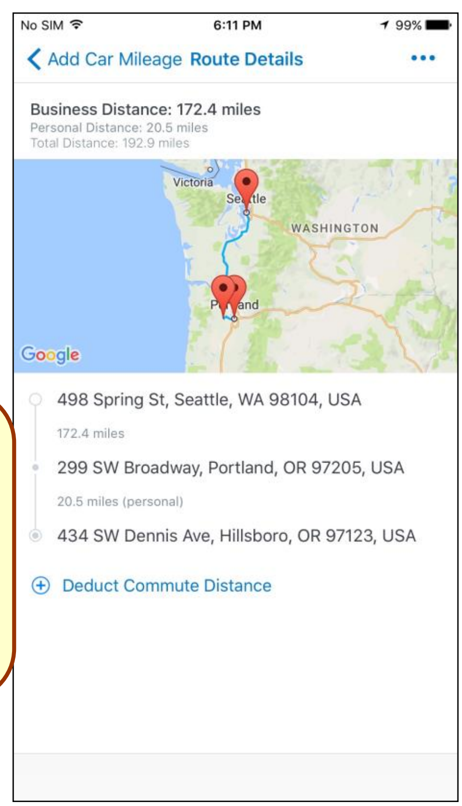
6) On the **Distance Calculator** screen, in the **Add Destination** field, start typing the ending location.
7) Select from the list of locations. The selected location appears on the map along with the mileage (lower-right corner).
8) On the **Distance Calculator** screen, you have several additional options:
   - Tap **Add Destination** to add another destination.
   - Tap **Options** (upper-right corner) to choose to avoid tolls or highways.
   - If an alternate route is available (shown as a gray line), you can select that route.
9) When done, tap **Use Route**. The mileage and the reimbursement amount appear on the **Add Car Mileage** screen.

MAKE ADJUSTMENTS

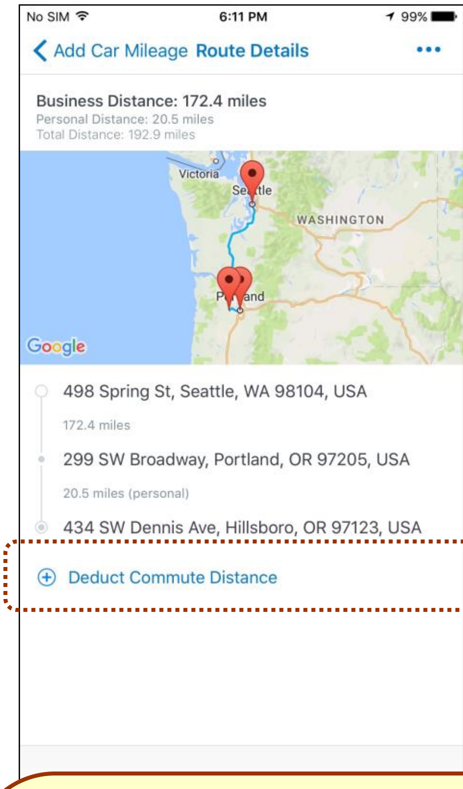


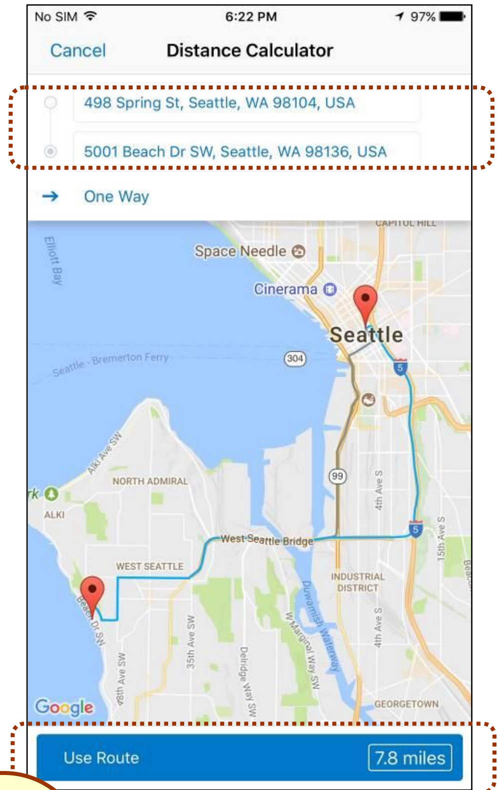
1) To make additional adjustments, on the **Add Car Mileage** screen, tap **Route Details**.
2) On the **Route Details** screen, click ••• (upper-right corner) to access the menu. Using the menu, you can:
   - Edit any portion of the trip
     – or –
   - Designate part of the trip as personal
3) To edit a route:
   - On the menu, tap **Edit Route**.
   - Make the desired changes, using the same steps as when you created the route.





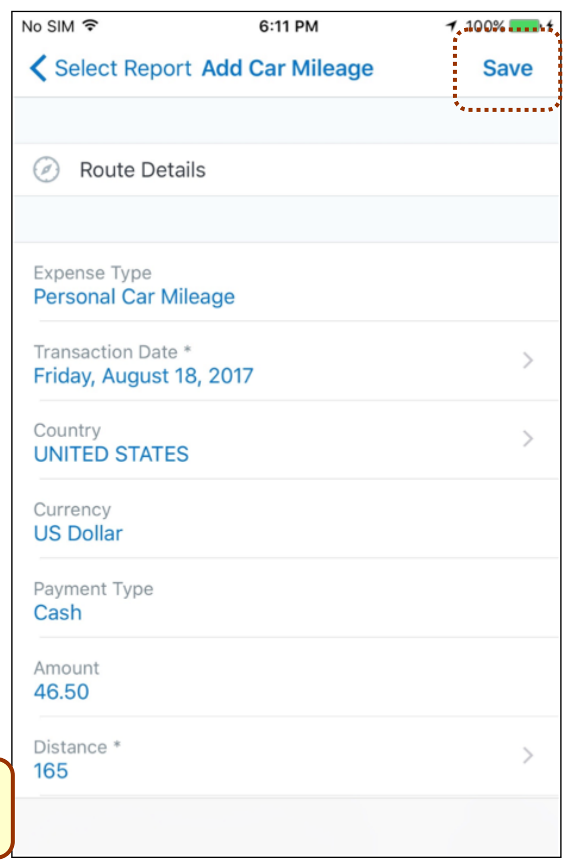
4) To designate part of the trip as personal:
   - On the menu, tap **Set Segment as Personal**.
   - On the **Set Personal** screen, select the segment that is personal.
   - Tap **Done**. On the **Route Details** screen, the personal distance shows at the top of the screen and the personal segment shows "(personal)."





5) To deduct commute mileage:
   - On the **Route Details** screen, tap **Deduct Commute Distance**.
   - Define the starting and ending points using the map.
   - Select whether the commute is one way or round trip.
   - When done, tap **Use Route**. The **Route Details** screen appears.

6) Tap **Add Car Mileage** (upper-left corner) to return to the **Add Car Mileage** screen, where the adjusted distance and amount appear.

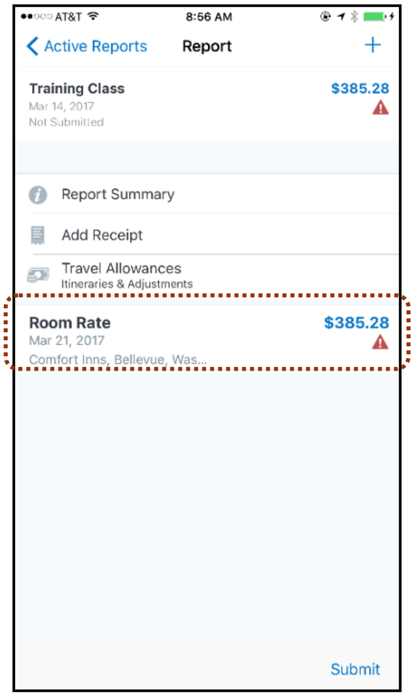


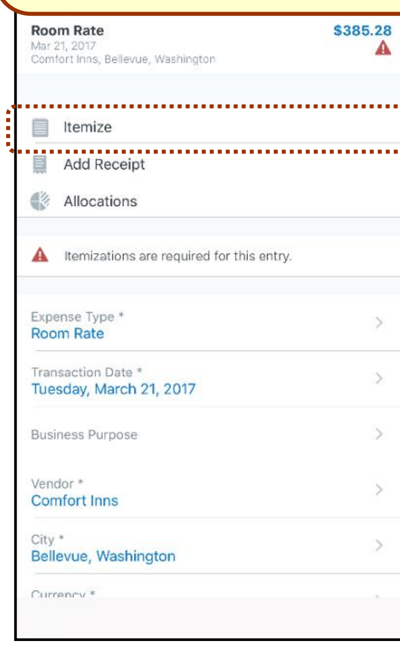
7) Tap **Save**. The expense is saved to the expense report.

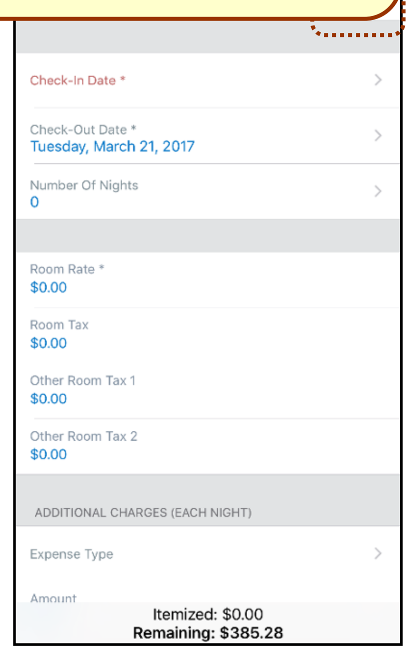
Add/Edit/Delete an Itemization

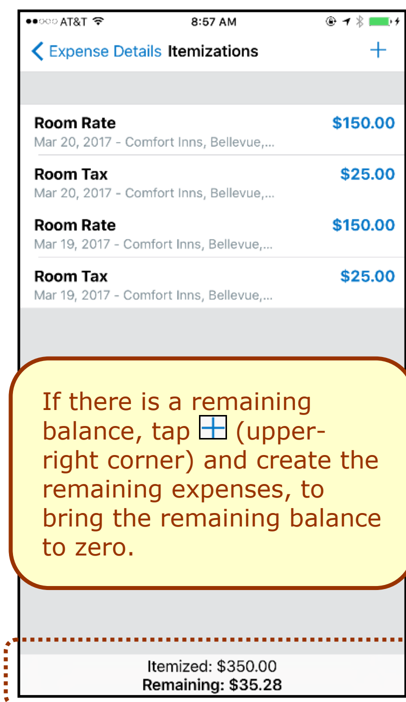
After an expense has been added to a report, you can itemize the expense.

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** (upper-right corner). The itemizations appear.

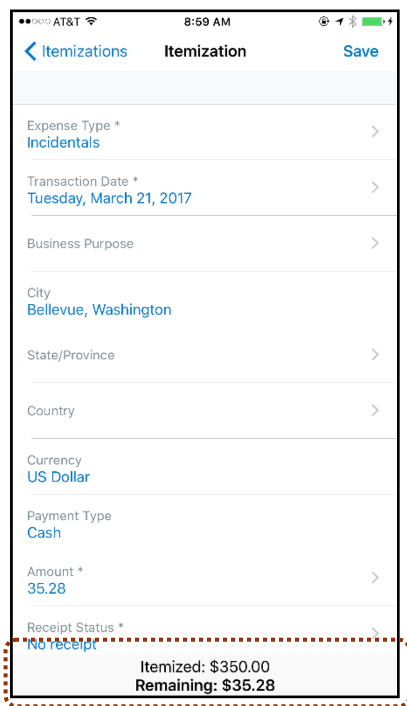


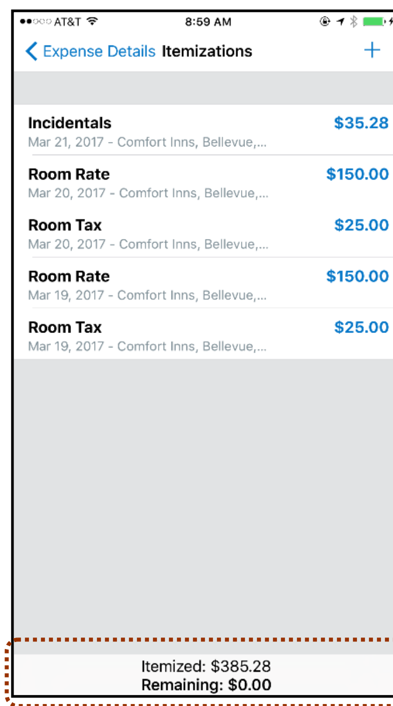






If there is a remaining balance, tap ⊞ (upper-right corner) and create the remaining expenses, to bring the remaining balance to zero.



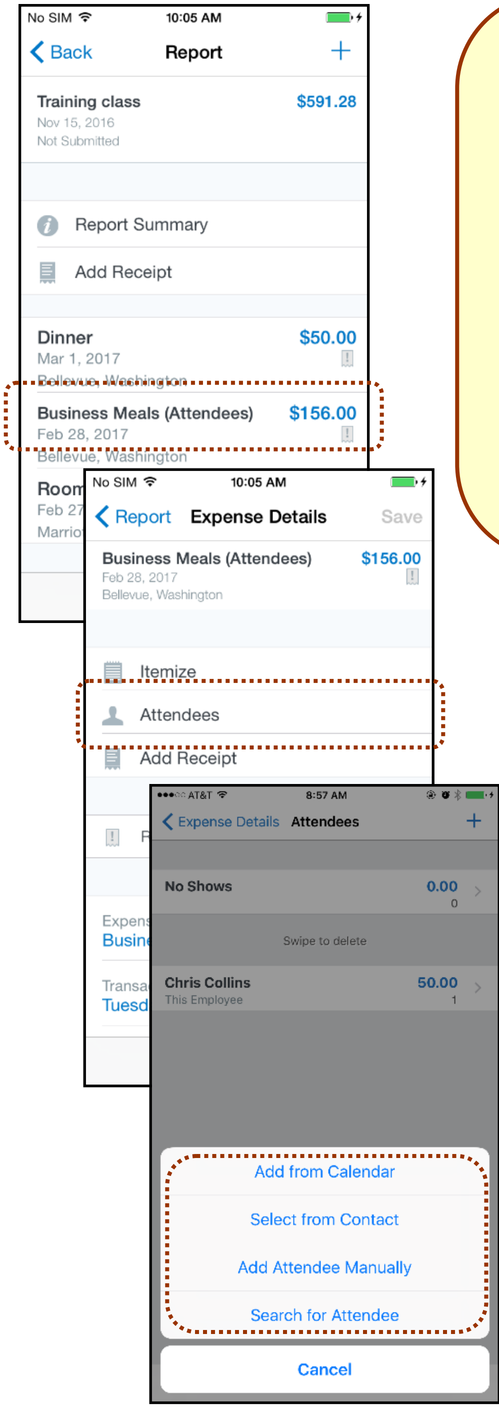


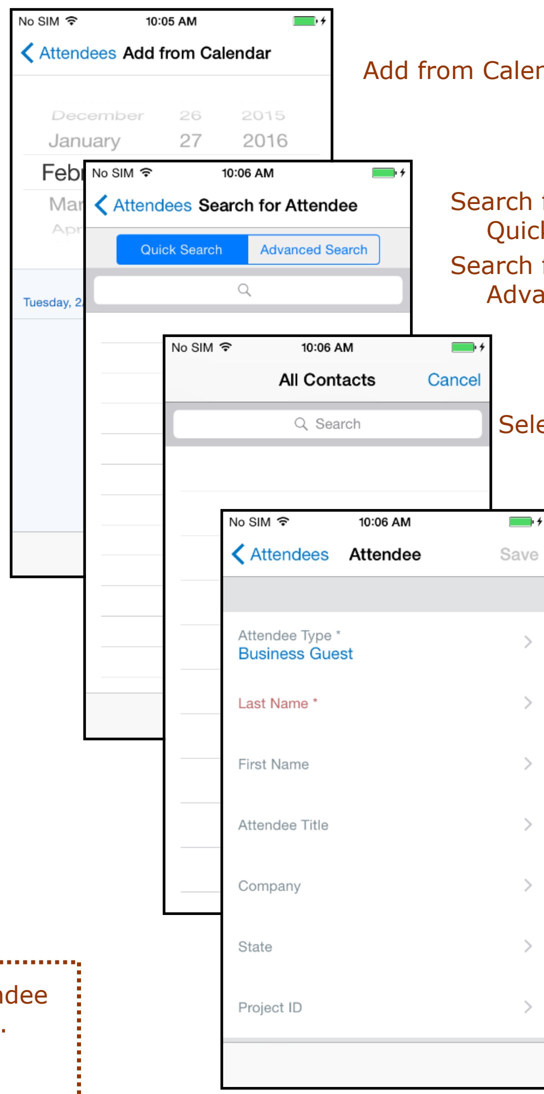
To ***edit*** an itemization, tap the desired itemization and then make the desired changes.
To ***delete*** an itemization, swipe the desired itemization to the left and then tap **Delete**.

Add/Edit/Delete Attendees

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:
   - **Add from Calendar** to import attendees from your calendar
   - **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





Add from Calendar

Search for Attendee > Quick Search

Search for Attendee > Advanced Search

Select from Contact

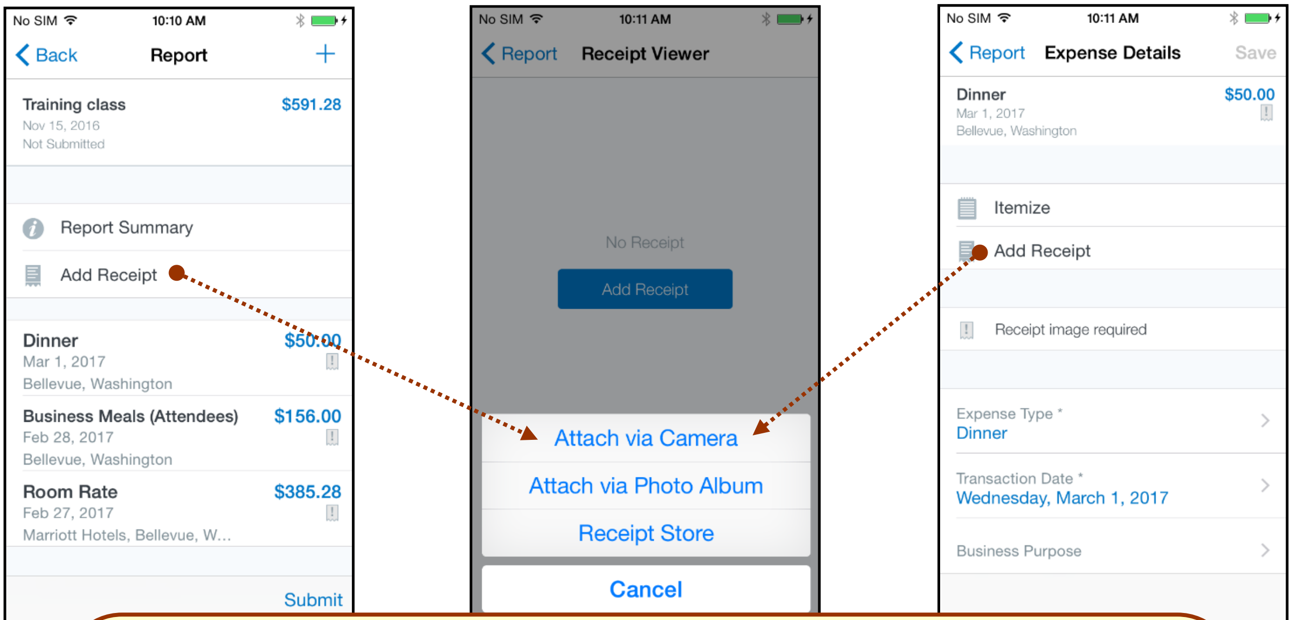
Add Attendee Manually

To ***edit*** an attendee, tap the desired attendee name and then make the desired changes.
To ***delete*** an attendee, swipe the desired attendee to the left and then tap **Delete**.

Receipts

Attach Receipts

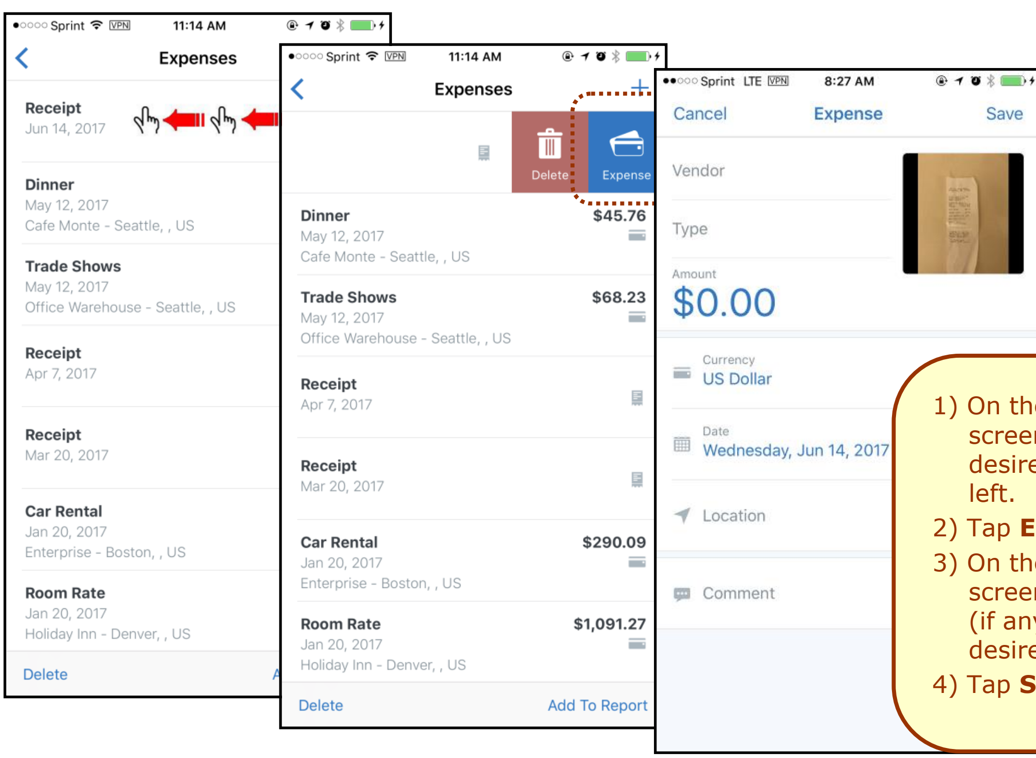
Attach a receipt to a report or to an individual expense, whichever the situation requires.



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

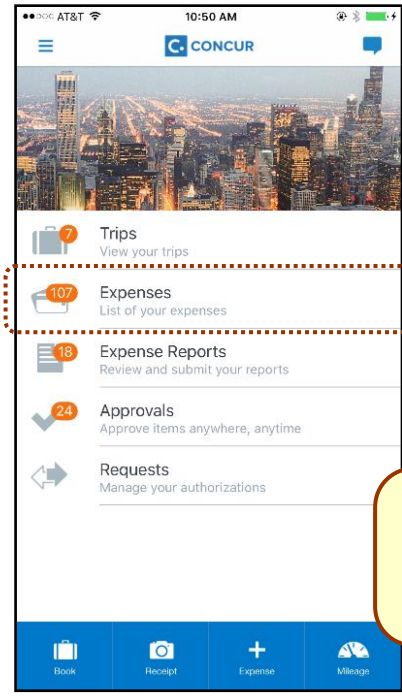
NOTE: Turn the device horizontally or upside down to correctly adjust the camera screen.

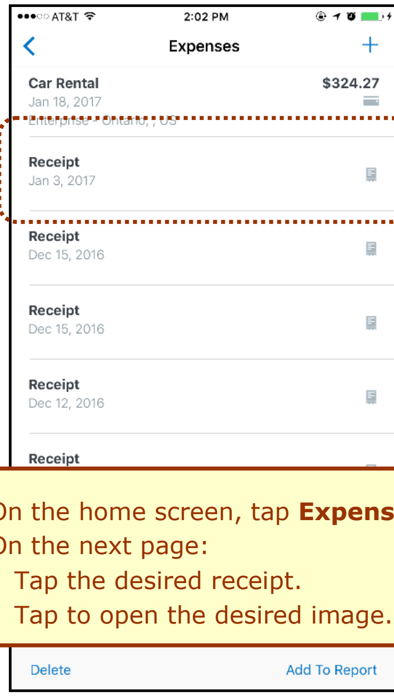
Create a Mobile Expense from a Receipt

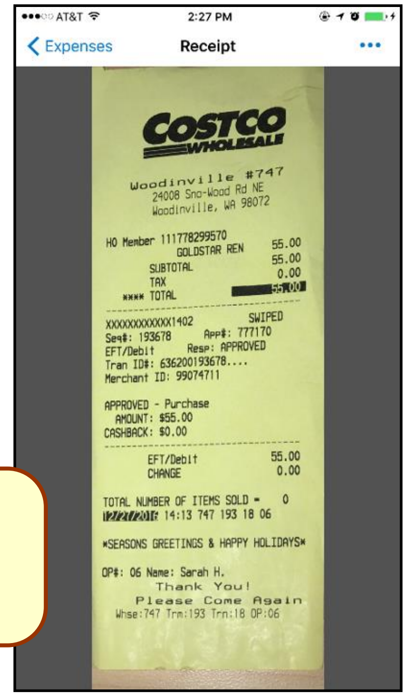


1) On the **Expenses** screen, swipe the desired receipt to the left.
2) Tap **Expense**.
3) On the **Expense** screen, fill in the fields (if any) and make the desired selections.
4) Tap **Save**.

View Receipts

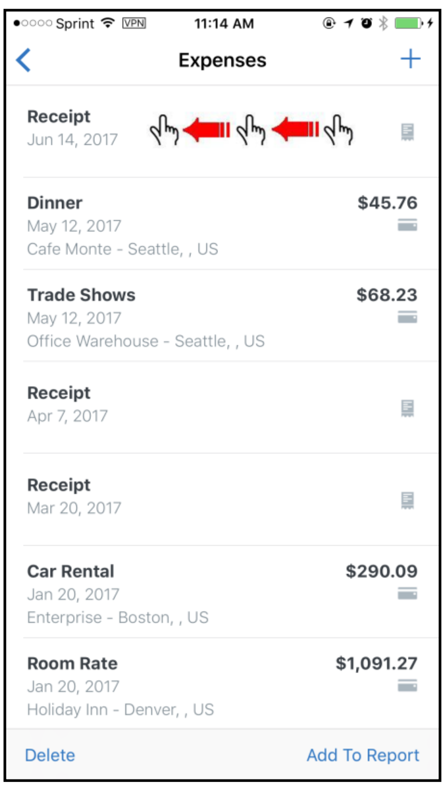


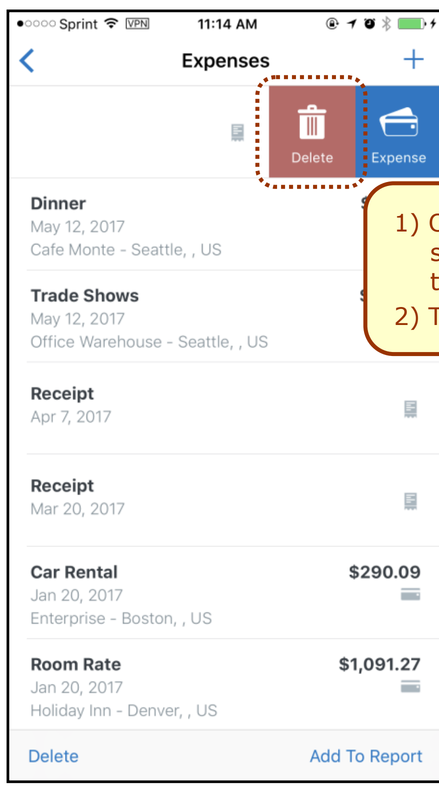




1) On the home screen, tap **Expenses**.
2) On the next page:
- Tap the desired receipt.
- Tap to open the desired image.

Delete Receipts



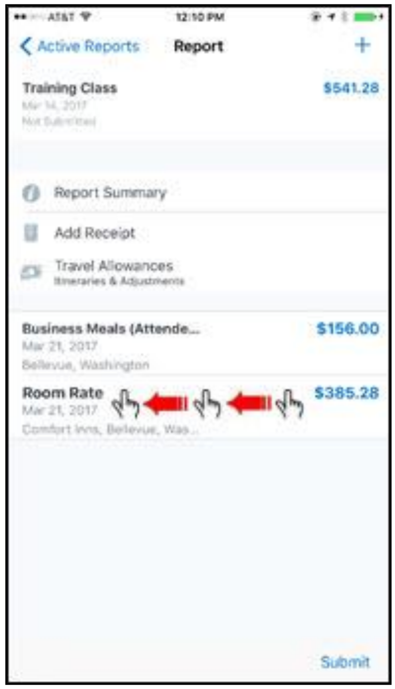


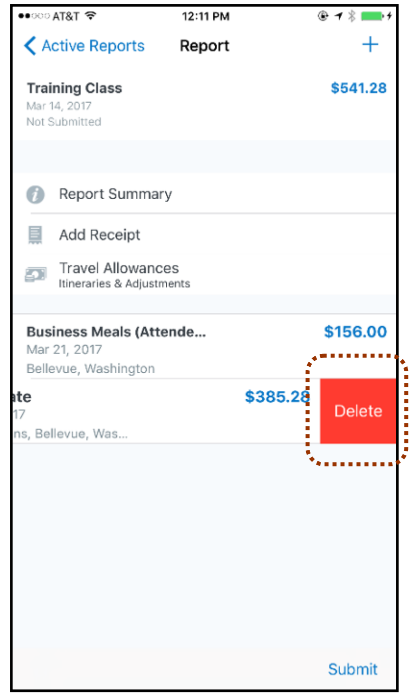
1) On the **Expenses** screen, swipe the desired receipt to the left.
2) Tap **Delete.**

Remove an Expense From an Expense Report

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

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





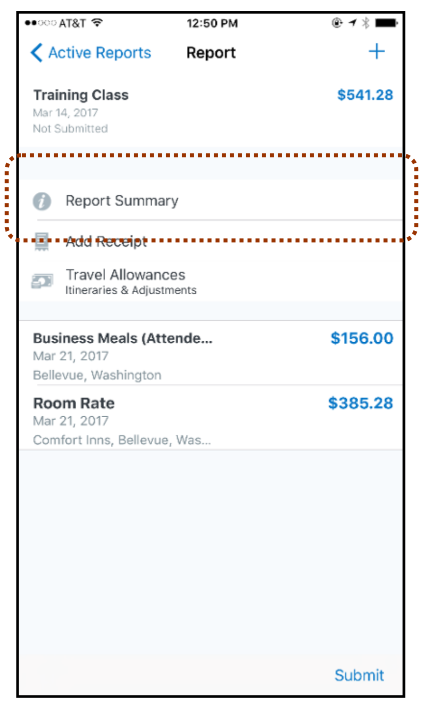
NOTE: If you delete a *mobile* expense or an expense created from a card transaction, it is not really deleted; it is moved back to the "pool" of expenses on the **Expenses** screen.

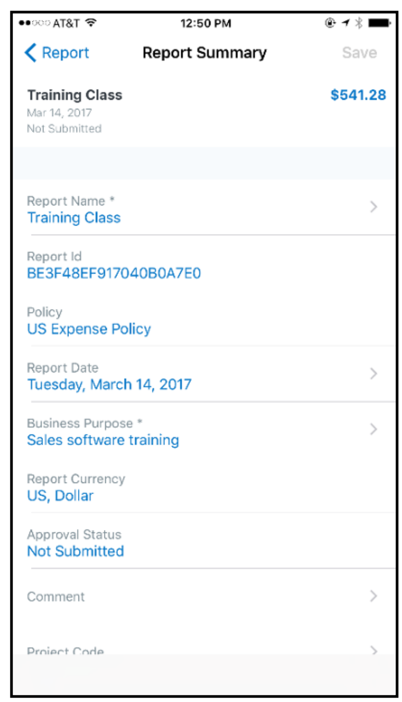
If you delete any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of Expense.)

Edit Report Header Information

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

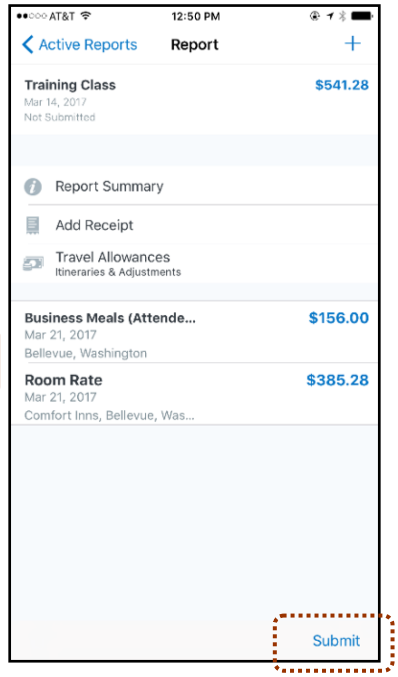
1) On the **Report** screen, tap **Report Summary**.
2) On the **Report Summary** screen, make the desired changes.
3) Tap **Save** (upper-right corner).





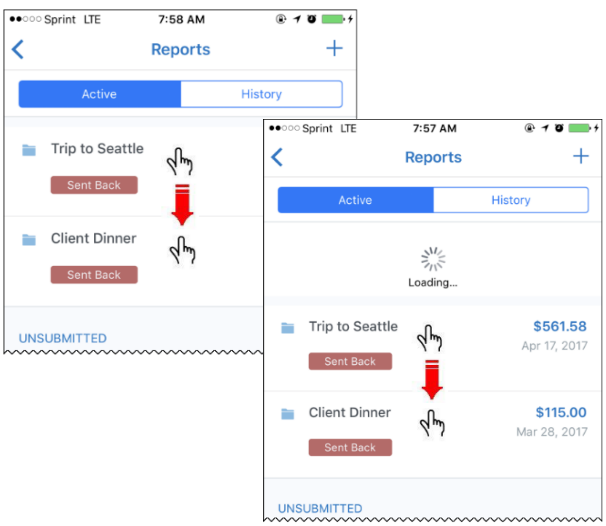
Submit an Expense Report

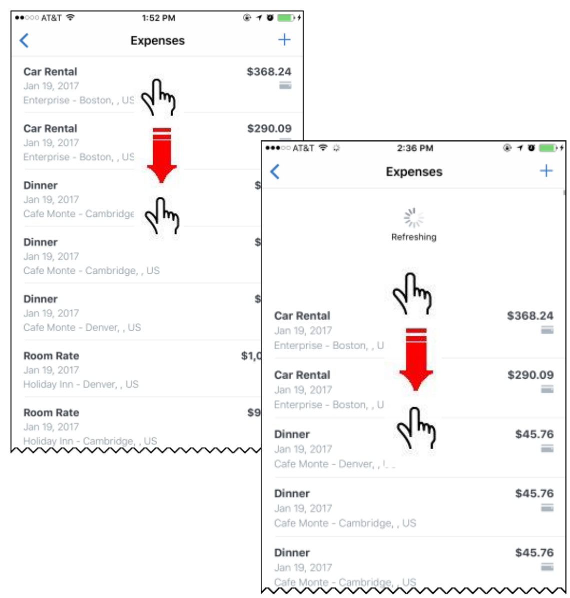
On the **Report** screen, tap **Submit**.



Refresh Data

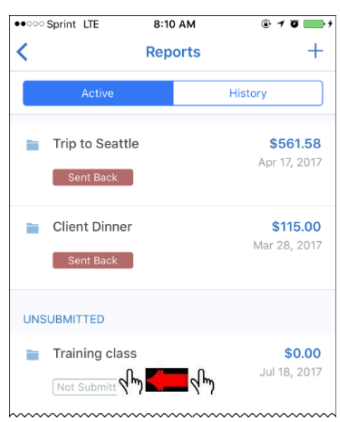
To refresh data – for example, expenses and reports – pull down from the top.

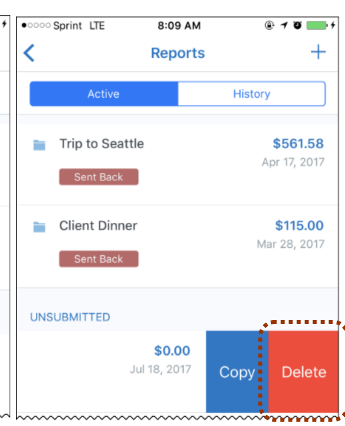




Delete an Unsubmitted Expense Report

1) On the **Reports** screen, tap **Active** and then swipe 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.

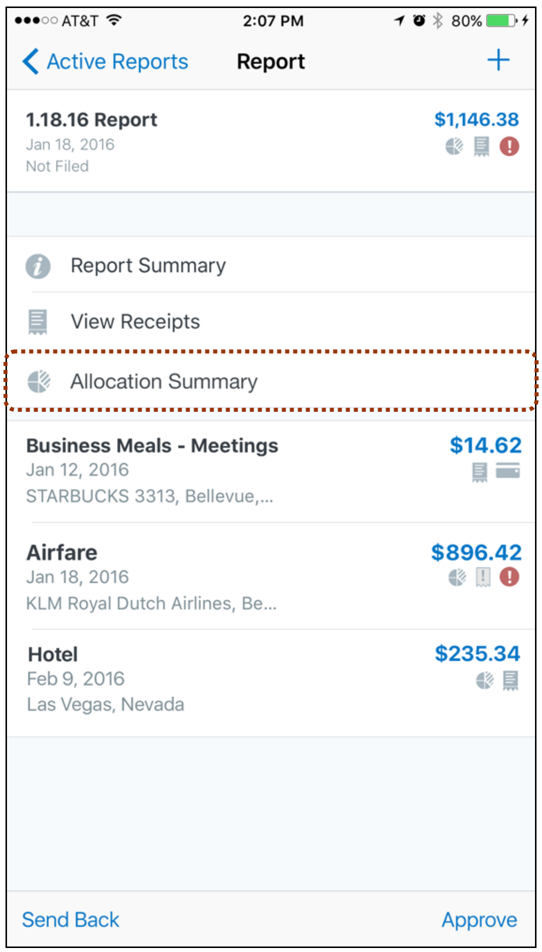
View/Add/Edit/Delete Allocations

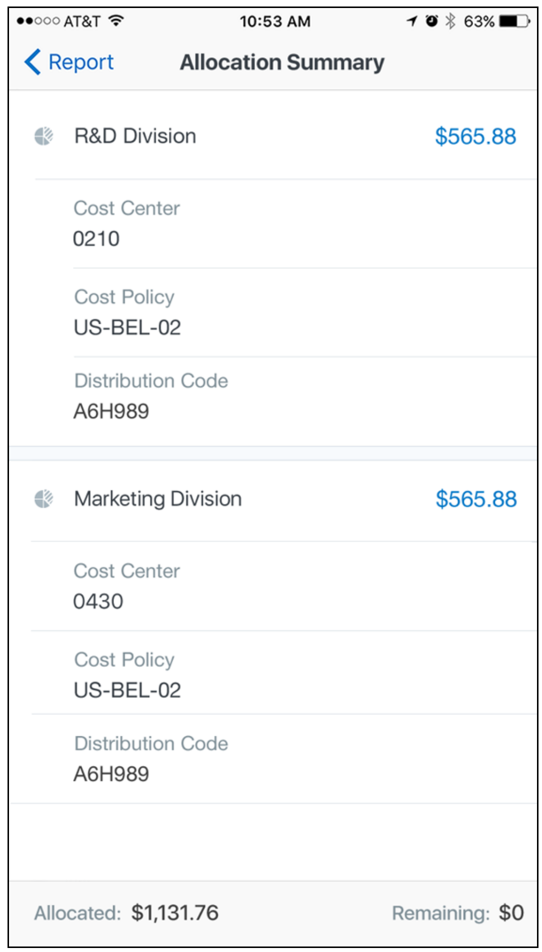
You can view report-level allocations, expense-level allocations, and itemization-level allocations.

VIEW REPORT-LEVEL ALLOCATIONS

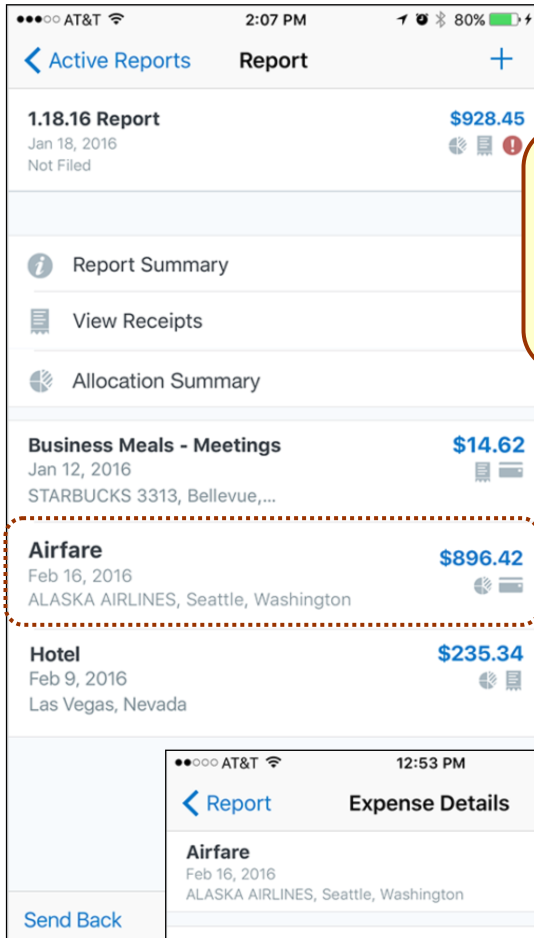
The **Allocation Summary** screen shows that the expenses are allocated to two cost centers (R&D and Marketing at 50% each). Each equals $565.88 with a total of $1,131.76. ($1,131.76 = the airfare and hotel expense on the report.)

1) On the **Report** screen, tap **Allocation Summary**.
2) On the **Allocation Summary** screen:
   - Review the information.
   - Tap **Report** (upper-left corner) to return to the report.

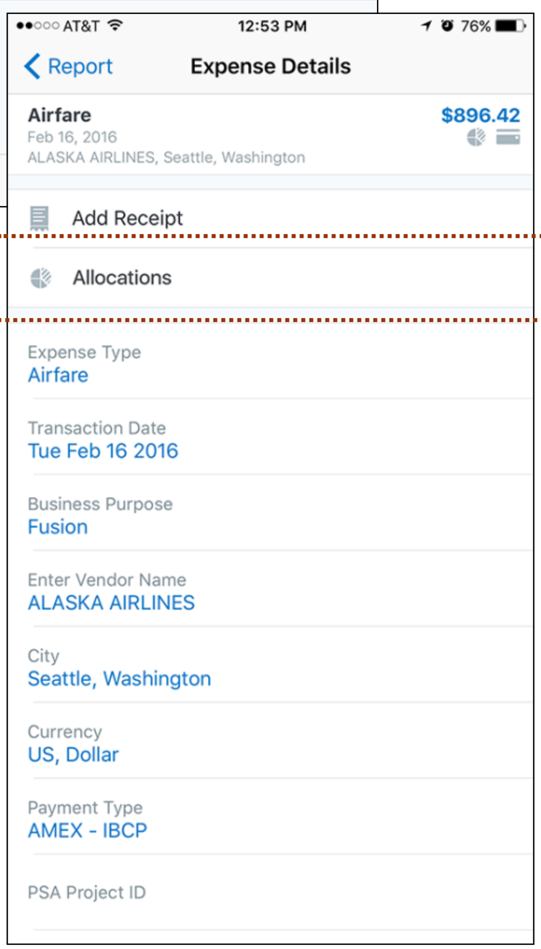


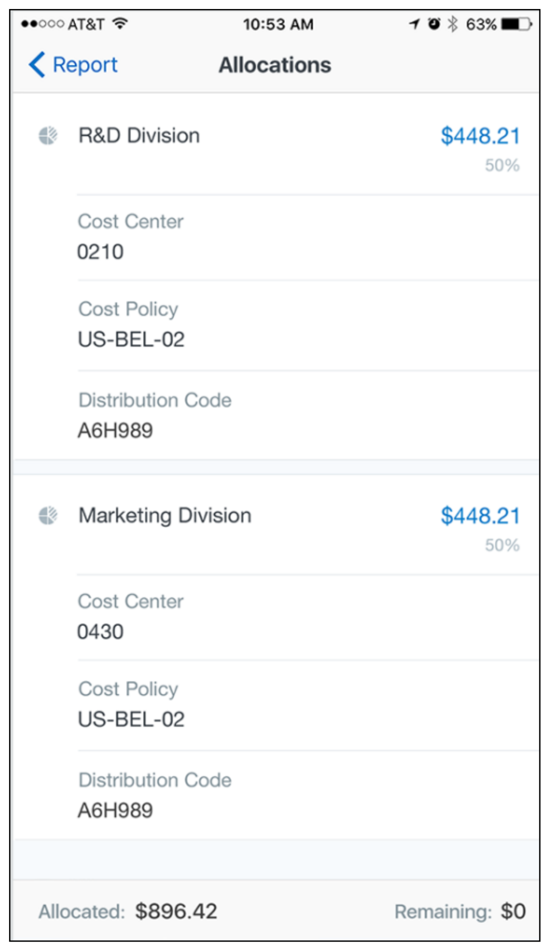


View Expense-Level Allocations



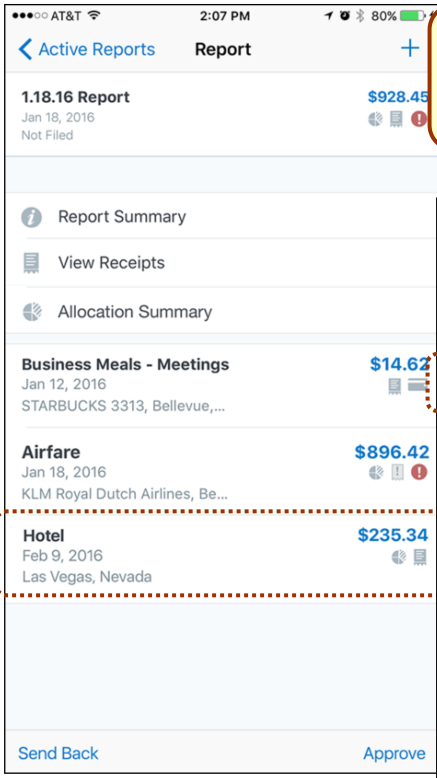
1) On the **Report** screen, tap the desired expense.
2) On the **Expense Details** screen, tap **Allocations**.
3) On the **Allocations** screen:
   - Review the information.
   - Tap **Report** (upper-left corner) to return to the report.

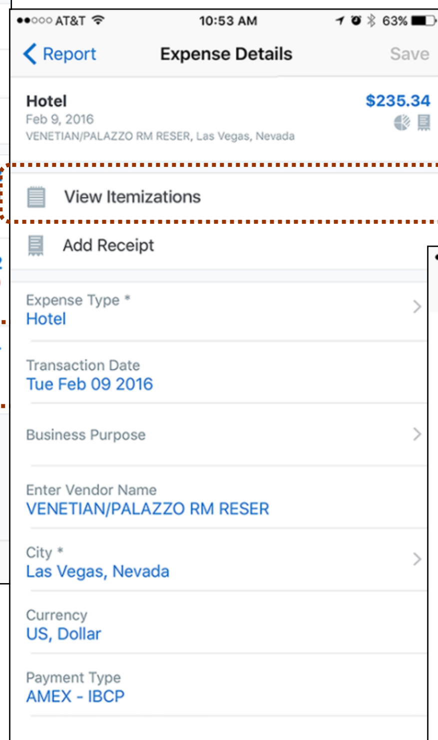


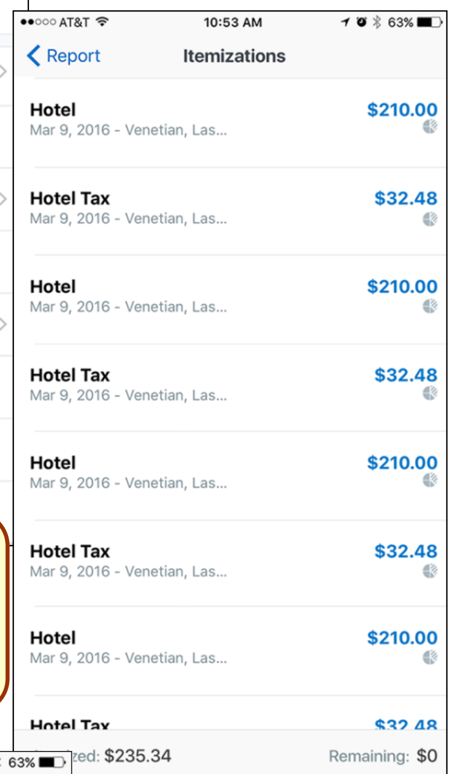


View Itemization-Level Allocations

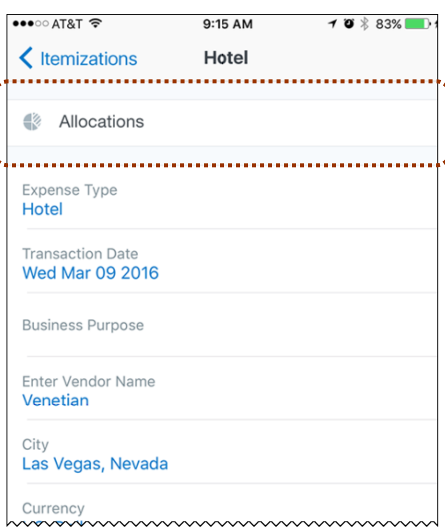
1) On the **Report** screen, tap the desired expense.
2) On the **Expense Details** screen, tap **View Itemizations**.
3) On the **Itemizations** screen, tap the desired itemization.

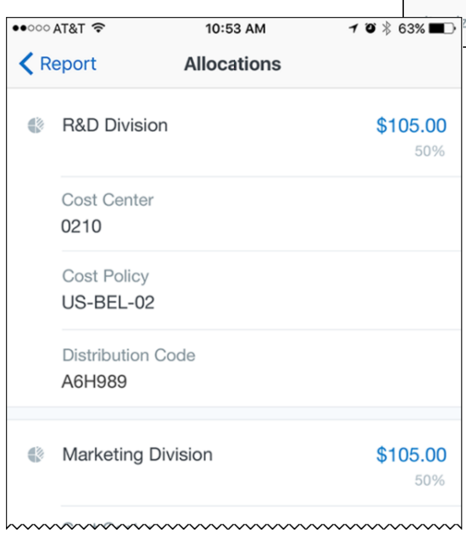




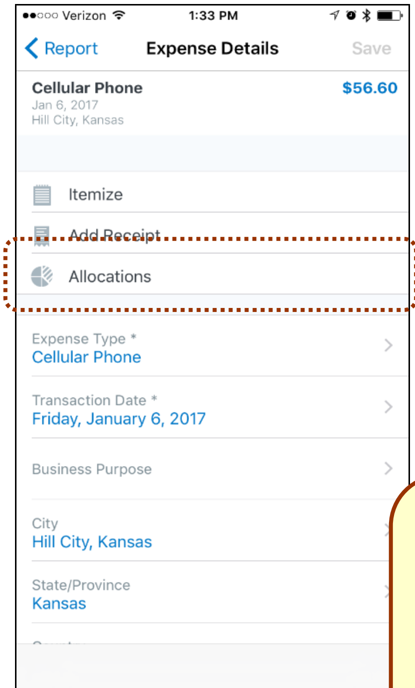


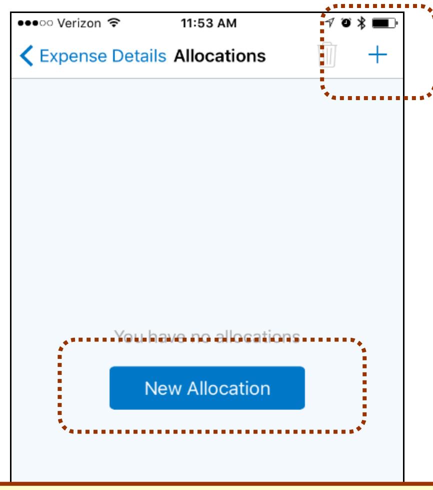
4) On the (in this case) **Hotel** screen, tap **Allocations**.
5) On the **Allocations** screen:
   - Review the information.
   - Tap **Report** (upper-left corner) to return to the report.





ADD/EDIT/DELETE ALLOCATIONS

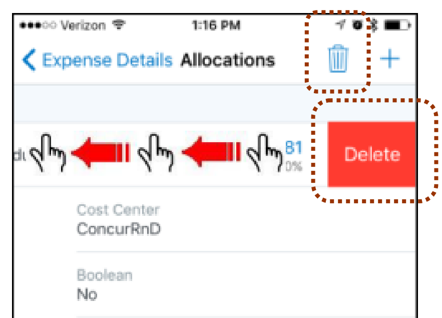




1) To ***add*** allocations, on the **Expense Details** screen:

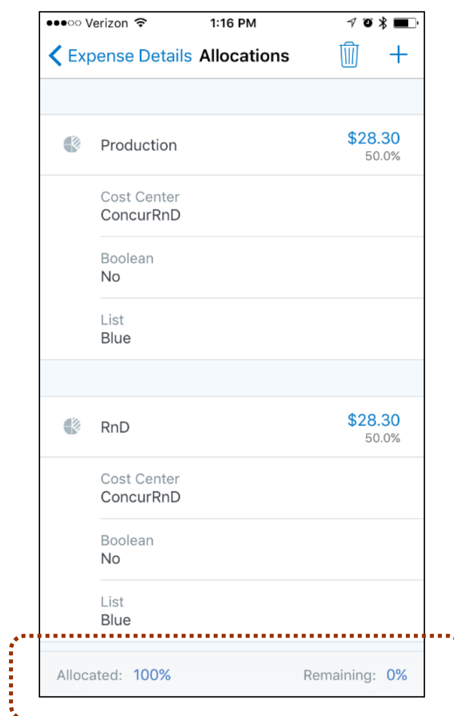
- Tap **Allocations**.
- Tap **New Allocation**.
- Fill in the fields (if any) and make the desired selections.
- Tap ⊞ (upper-right corner) to add additional allocations.

2) To ***edit*** an allocation, on the **Allocations** screen, tap the desired allocation to open it and then make the desired changes.



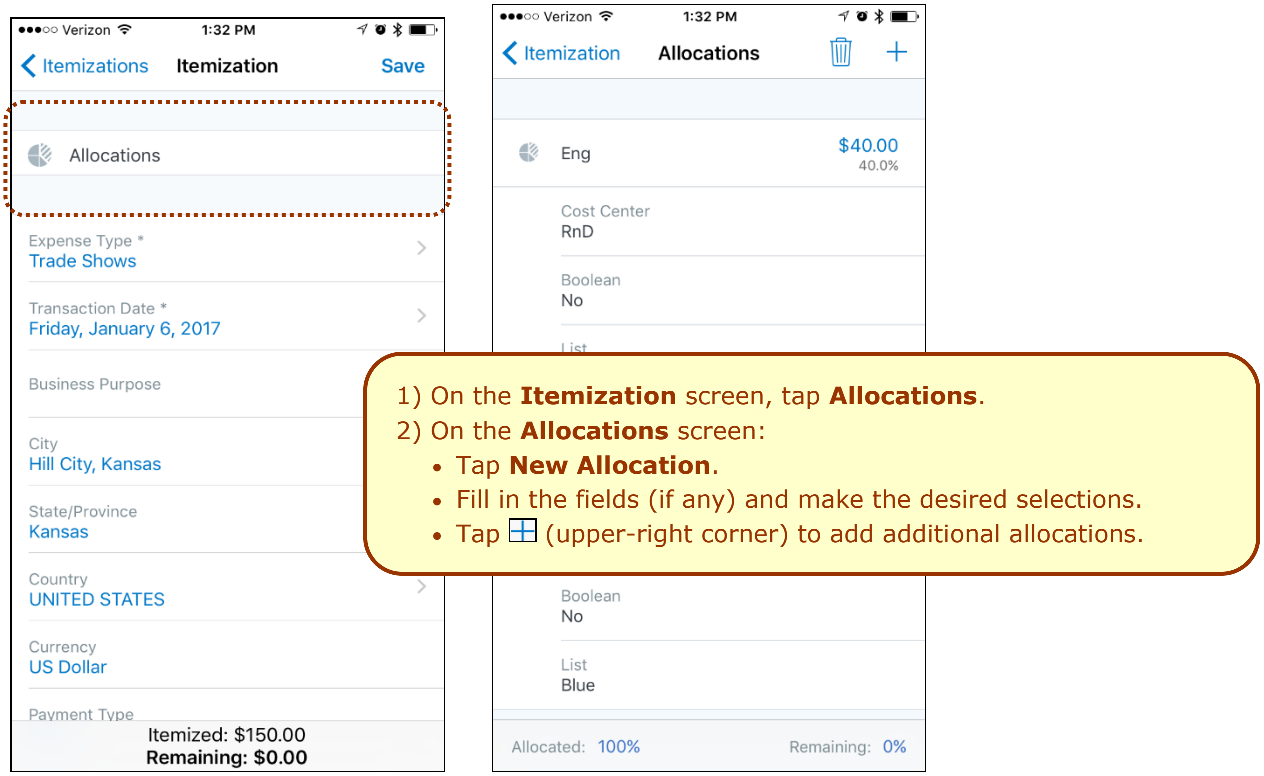
3) To ***delete*** an allocation, on the **Allocations** screen:

- Swipe left and tap **Delete**.
- Tap to delete all allocations for an expense



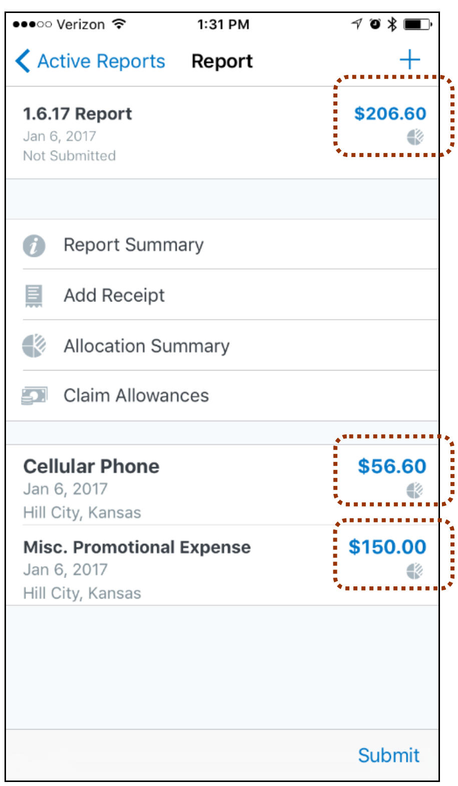
4) At the bottom of the **Allocations** screen, review the **Allocated** and **Remaining** percentages.

Create Itemization-Level Allocations



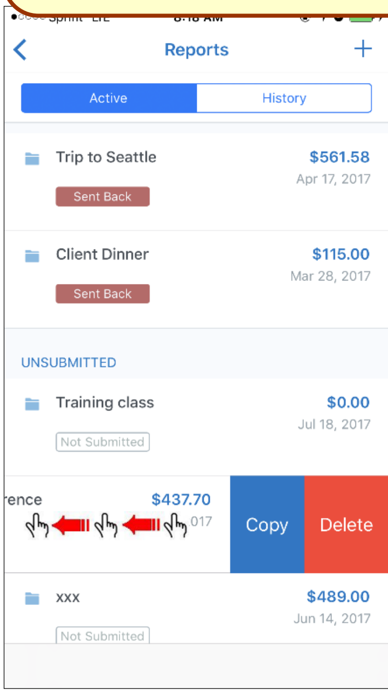
Icon

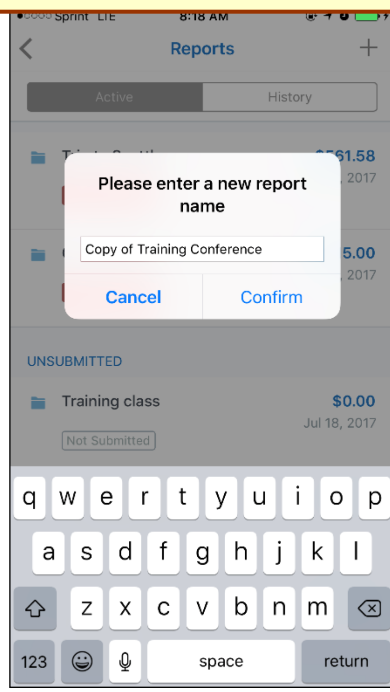
Once items are allocated, an Allocation icon appears next to the expense and at the report level.

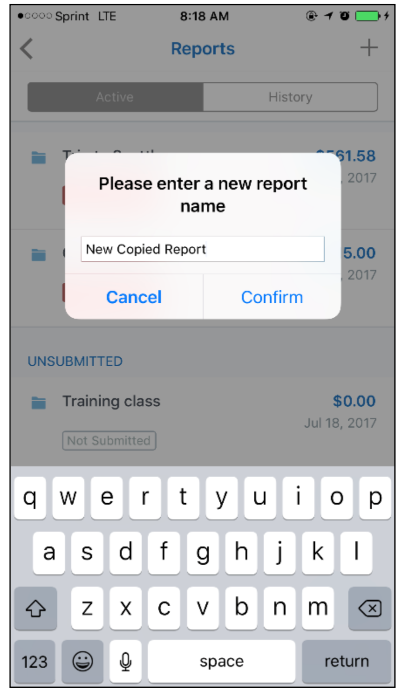


Copy Report From Existing Report

1) On the **Reports** screen, swipe the desired report to the left. The **Copy** option appears.
2) Tap **Copy**. A box appears (with the existing report name), requesting a new report name.
3) Enter the new name and tap **Confirm**.



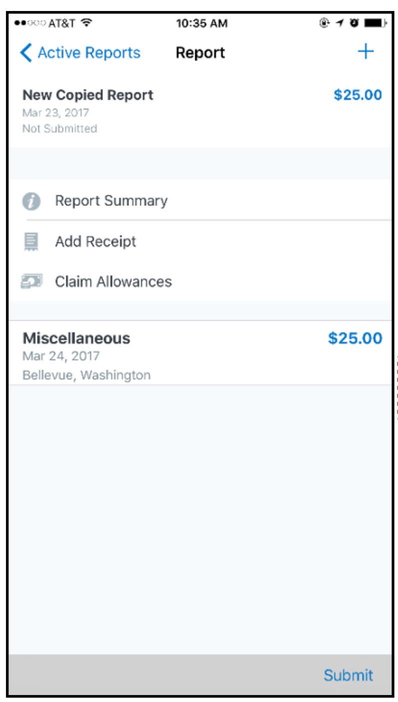


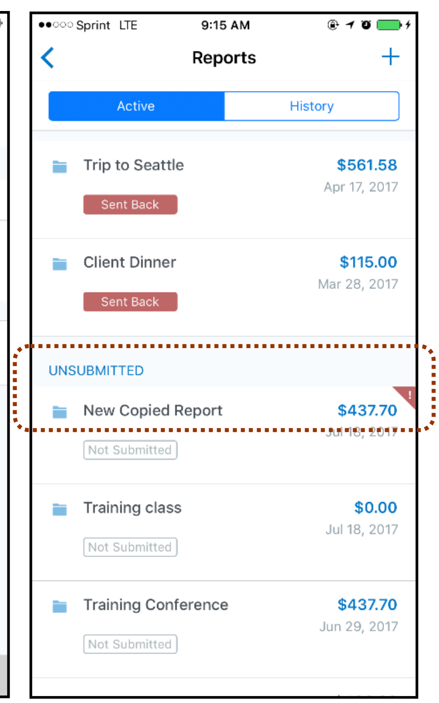


The copied report appears.

4) Make the desired changes, attach receipt images, etc.
5) Save or submit as usual.

The copied report appears on the **Reports** screen.





Work With Fixed Travel Allowances

Users can claim their ***fixed*** meals and ***fixed*** lodging travel allowances in the Concur mobile app.

FIXED VS REIMBURSABLE TRAVEL ALLOWANCES

- ***Fixed*** travel allowances – often referred to as *per diems* – provide a defined daily amount regardless of the actual amount spent by the user.
- ***Reimbursable*** travel allowances generally provide reimbursement for the actual amount of the expense. The ability to create and manage reimbursable travel allowances is not yet available in the mobile app.

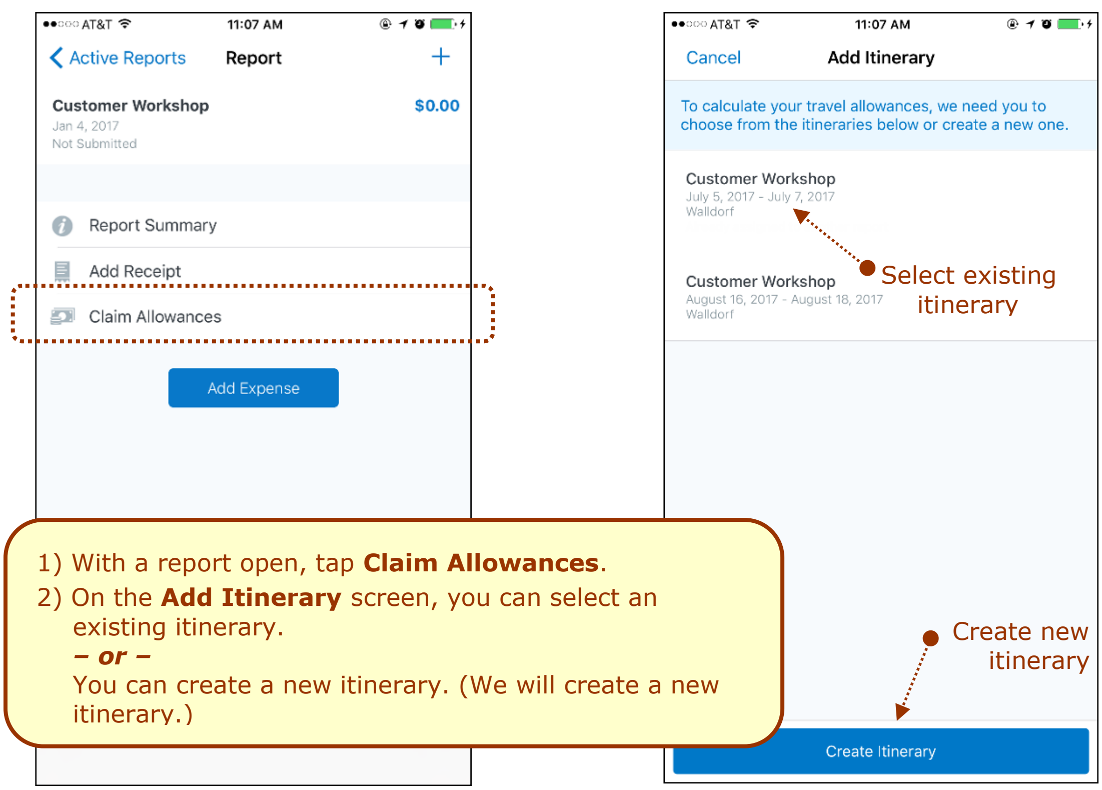
RESTRICTIONS

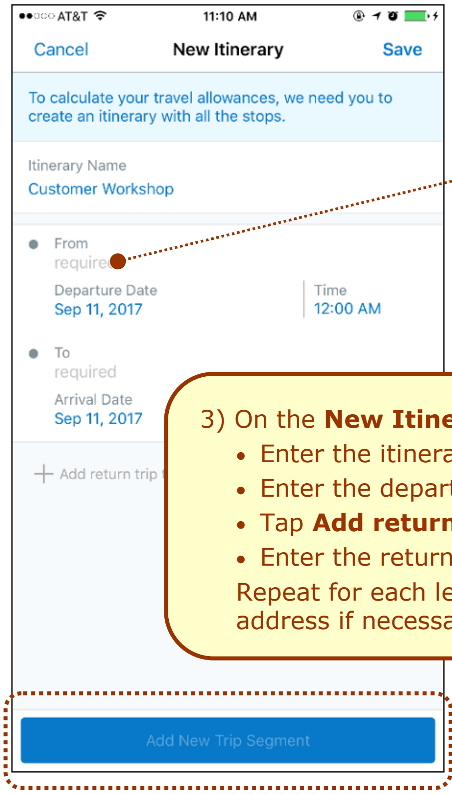
For the most part, fixed travel allowances work the same way in the mobile app as on the web version of Concur – with some exceptions. These configuration options are not available in the Concur mobile app:

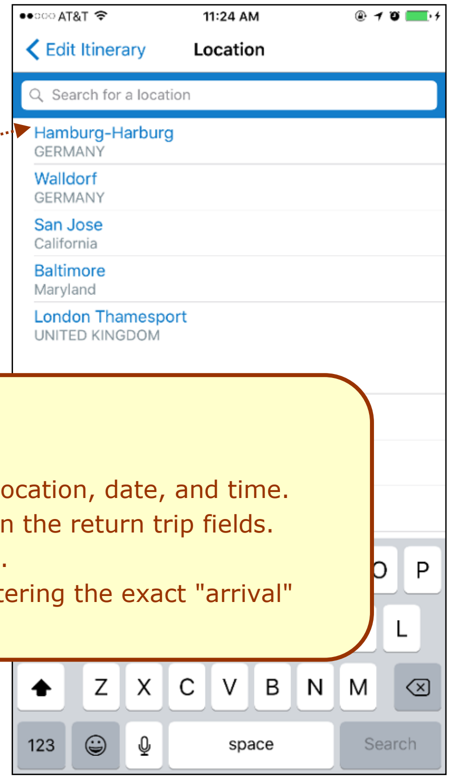
- Users cannot define/select:
  - Trip length
  - "Short distance"
  - "Extended trips"
  - "Use Percent Rule"
  - Location "within municipality"
- Users cannot enter:
  - Actual meal amounts
  - Rate location
- The mobile version of Concur does not combine meals and lodging rates nor does it display base rates, company rates, government rates, etc.

If the user's configuration uses any of the options listed above, the user should manage their travel allowances using the web version of Concur.

CREATE FIXED ALLOWANCES



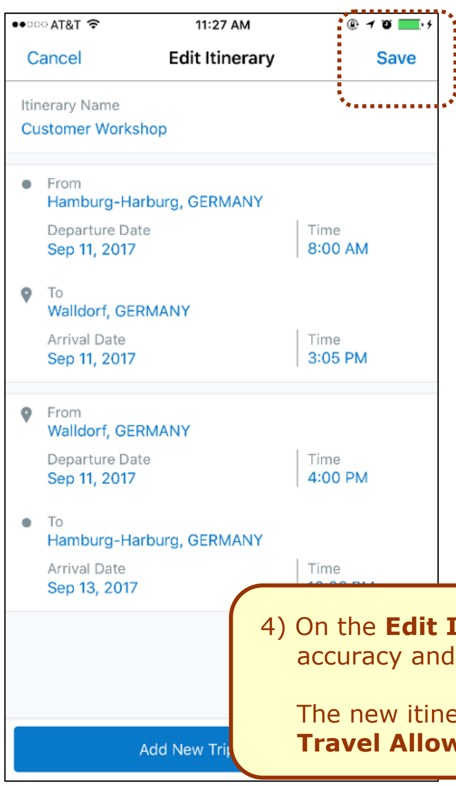


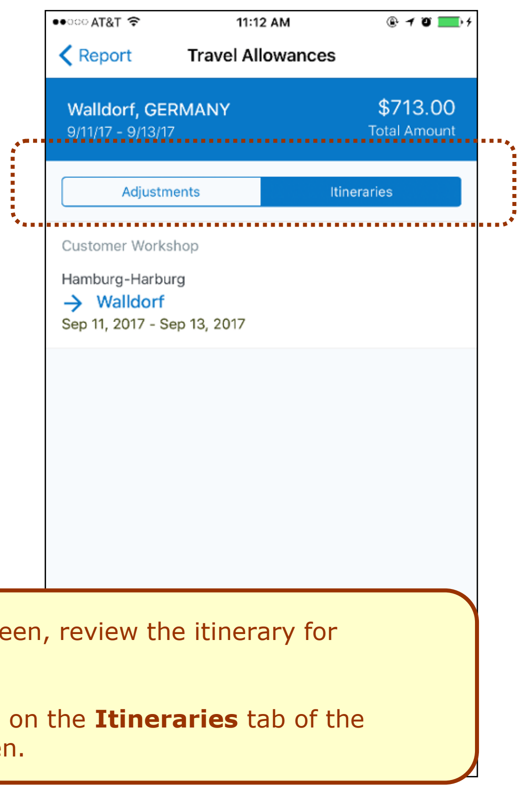


3) On the **New Itinerary** screen:

- Enter the itinerary name.
- Enter the departure and arrival location, date, and time.
- Tap **Add return trip to** to obtain the return trip fields.
- Enter the return trip information.

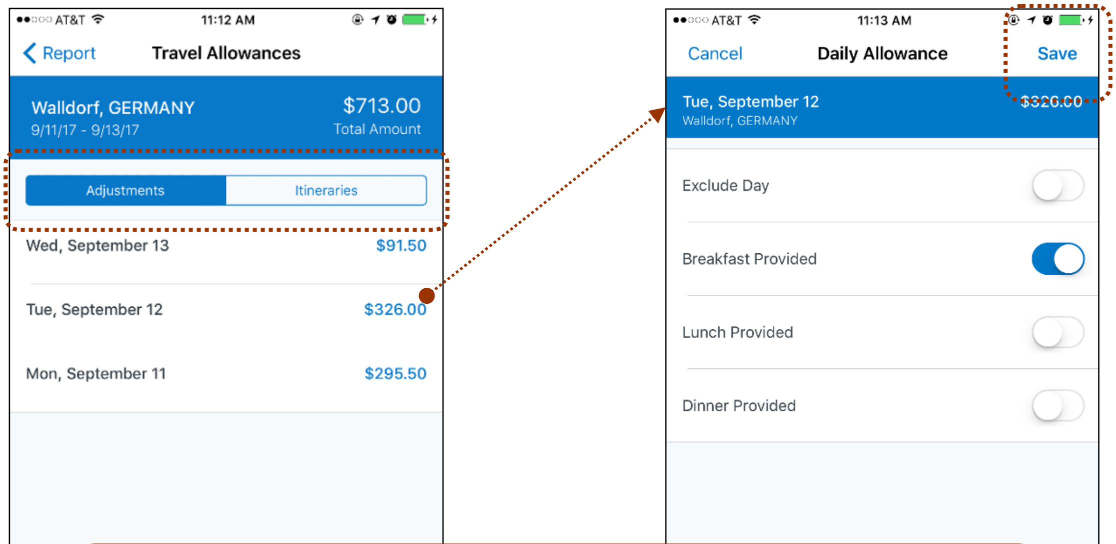
Repeat for each leg of the trip, entering the exact "arrival" address if necessary.



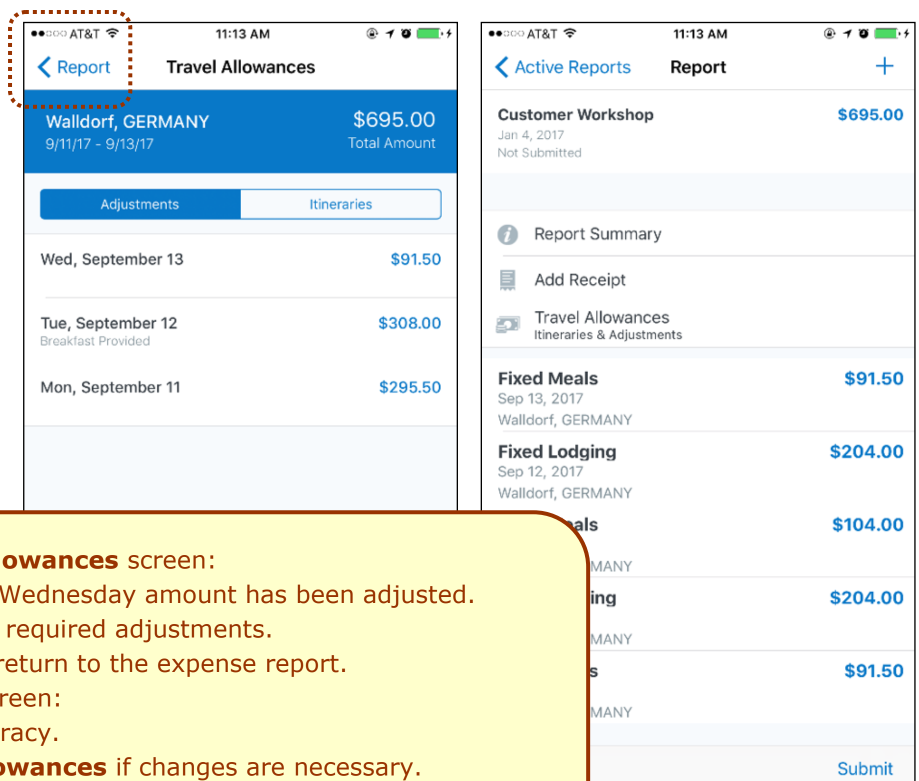


4) On the **Edit Itinerary** screen, review the itinerary for accuracy and tap **Save**.

The new itinerary appears on the **Itineraries** tab of the **Travel Allowances** screen.



5) If adjustments are necessary (for example, to deduct for provided meals), tap the **Adjustments** tab on the **Travel Allowances** screen.
6) Tap to open the daily allowance that requires adjustment.
7) On the **Daily Allowance** screen:
   - Make the desired adjustments, in this case, to indicate that breakfast was provided on Wednesday.
     NOTE: If the web version of Concur provides a list of options instead of Yes/No, then the list appears here as well.
   - Tap **Save**.



8) On the **Travel Allowances** screen:
   - Notice that the Wednesday amount has been adjusted.
   - Make any other required adjustments.
   - Tap **Report** to return to the expense report.
9) On the **Report** screen:
   - Review for accuracy.
   - Tap **Travel Allowances** if changes are necessary.
   - Finish adding expenses, receipts, etc. Submit when ready.

Request

Initial Feature Set and Options

Multiple policies per user: For clients who allow users to select from multiple policies on the web version of Request, be aware that users cannot select a policy in the Concur mobile app. Instead, all requests are created with the first policy that supports segments, preferably the default policy.

Header form: On this form, only these fields are currently supported:

To Location	Comment
Start Date	Business Purpose
End Date	

Segment form: On this form, only these fields are currently supported:

From Location	Comment
To Location	Amount
Start Date / Time	Currency (read-only)
End Date / Time	

Segment types: Only these system segment types are currently supported; ***custom segment types are not yet supported***:

Air Ticket	Hotel
Rail Ticket	Miscellaneous
Car Rental	

Workflow: Only "Submit" and "Recall" actions are currently supported. In addition for "Submit," in those cases where the client allows the user in the web version of Concur to select his/her own approver on submit, be aware that this option is not yet available in the mobile app. The request user's default approver must appear in the user's profile.

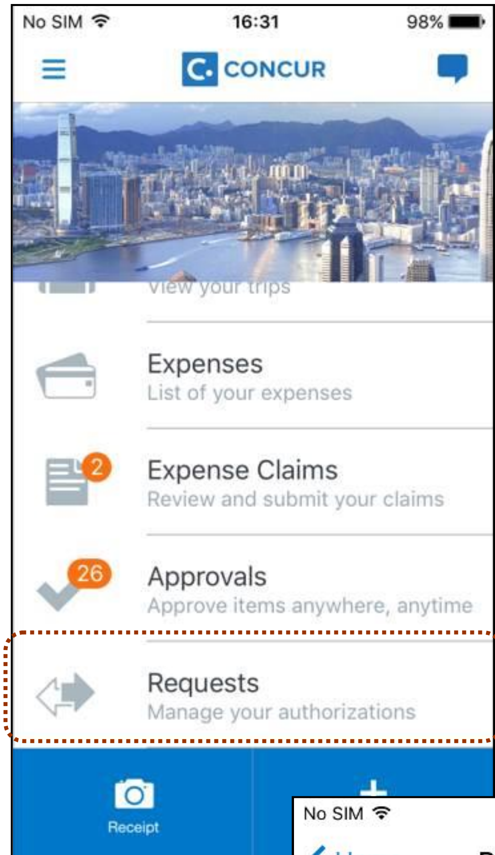
Not yet available: These options are not currently available in the mobile app:

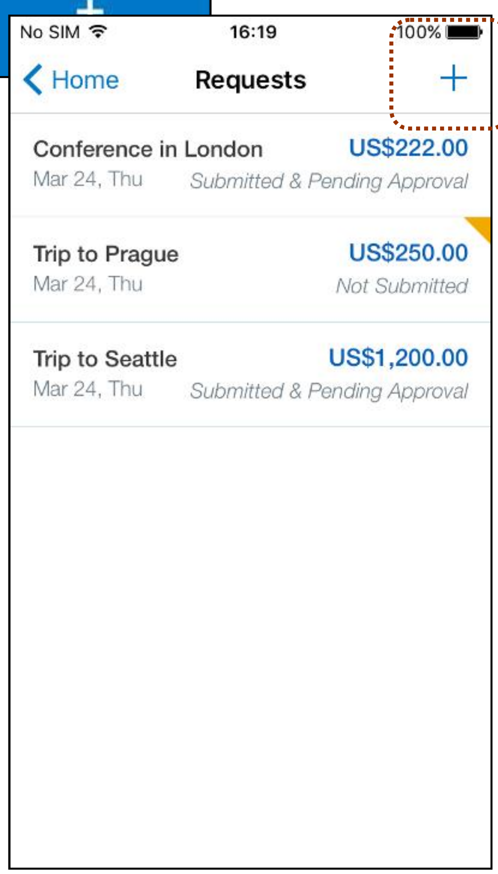
Allocations	Request & Travel integration
Expected Expenses	Custom Fields
Cash Advances	

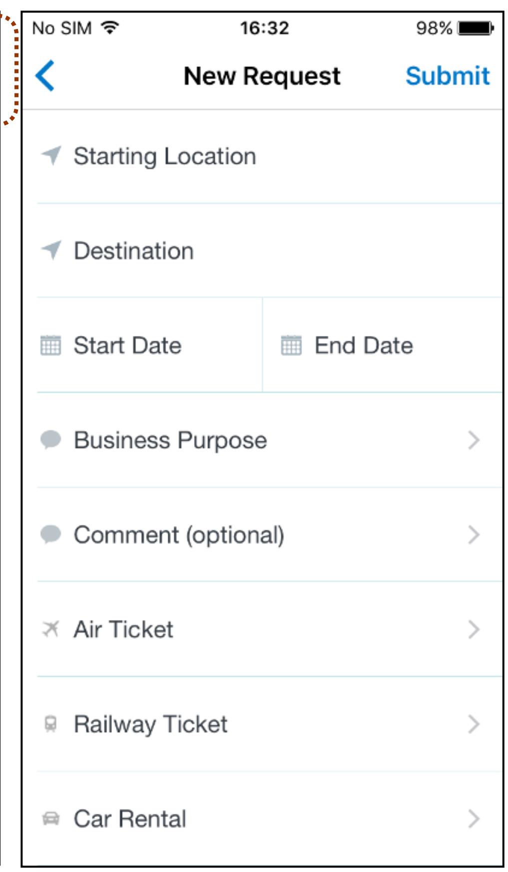
Create a New Request

You can create a new request from the **Requests** screen:

1) On the home screen, tap **Requests**.
2) On the **Requests** screen, tap ⊞ (upper-right corner).
3) On the **New Request** screen, fill in the location and date fields. (Concur provides a request name based on location and destination.)
4) Add your segments (described on the following page).

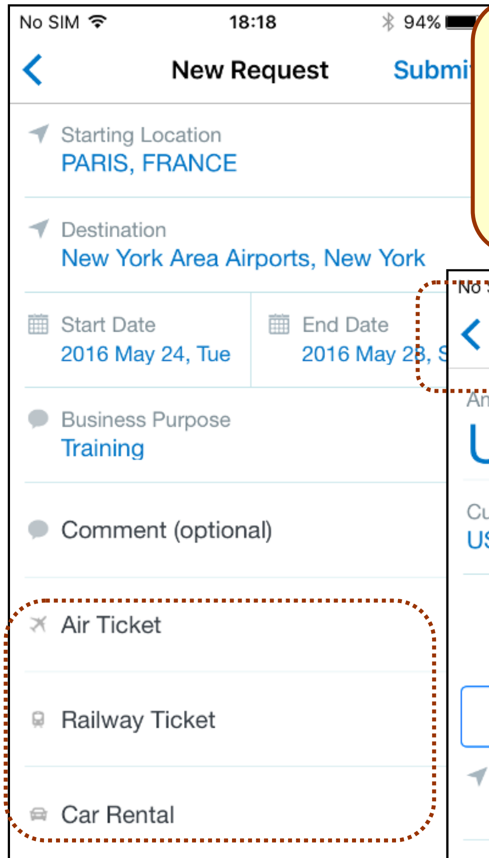


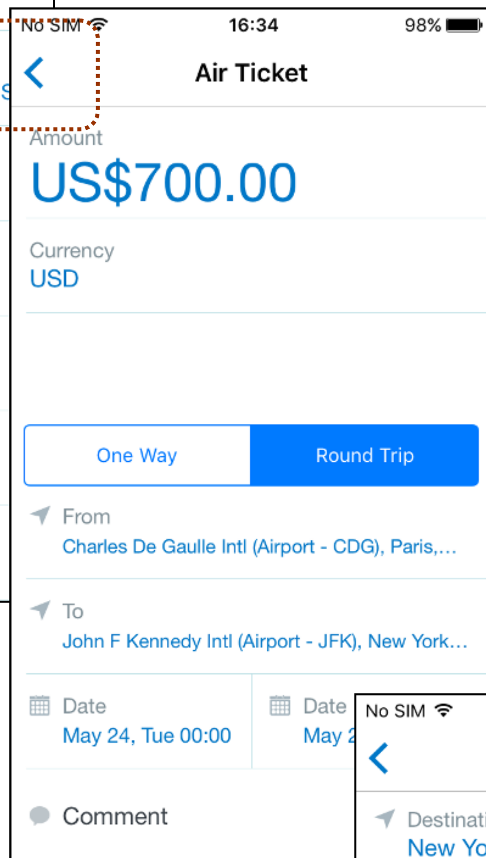




Add Segments to a Request

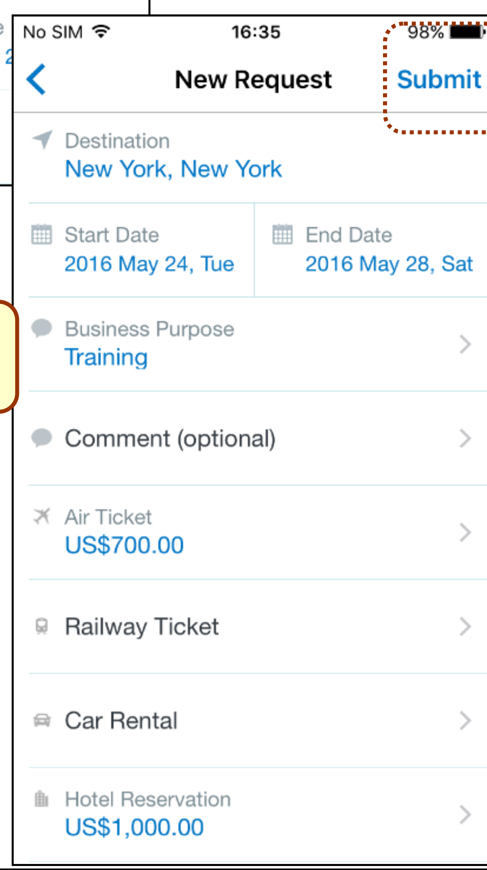
1) On the **New Request** screen, tap a segment type.
2) On the various segments screens, fill in the fields and make the desired selections.
3) Tap < (upper-left corner) to return to the **New Request** screen.
4) Add other segments as desired.





Submit a Request

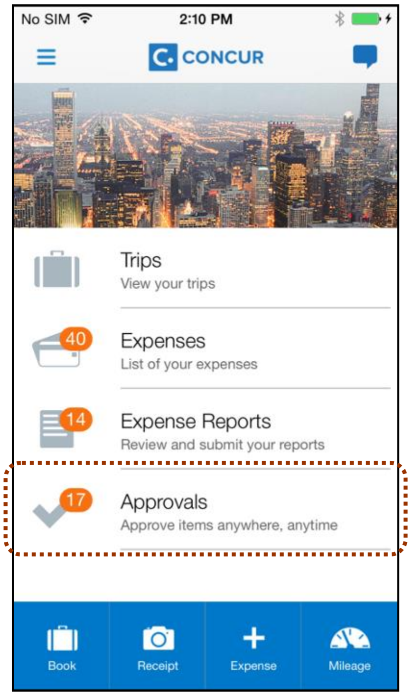
On the **New Request** screen, tap **Submit** (upper-right corner).



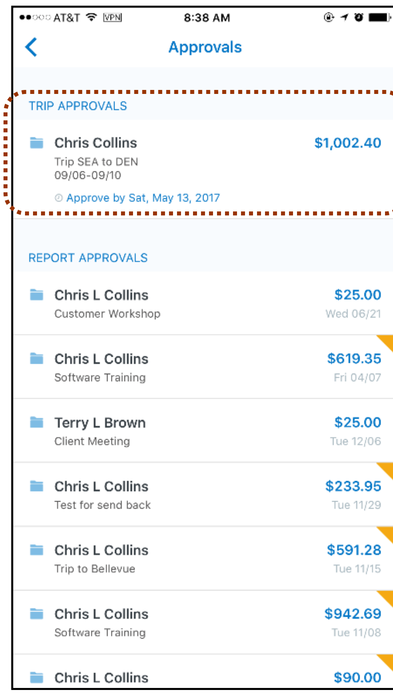
Approvals

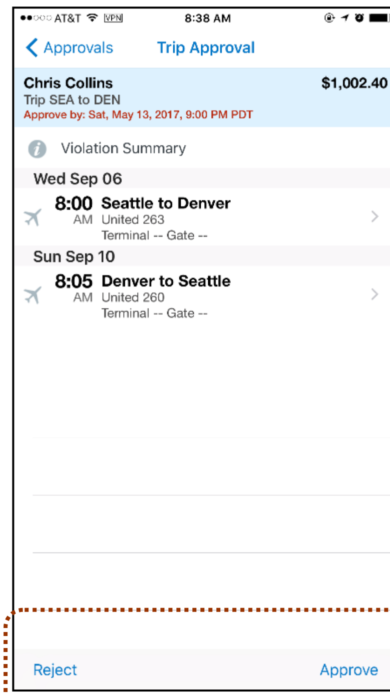
Trips

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**.





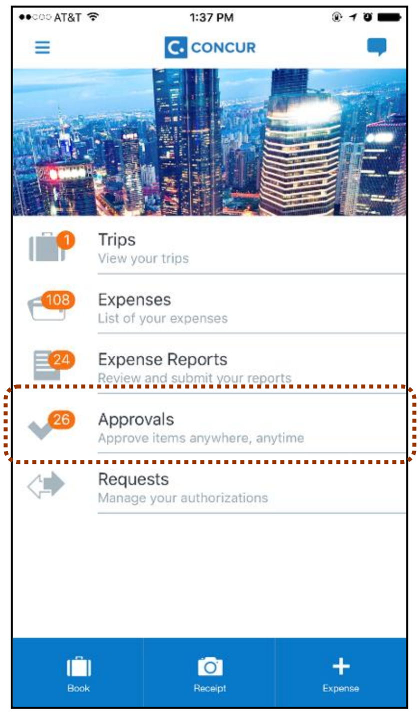
In the **Report Approvals** and **Trip Approvals** sections  indicates that there are exceptions.

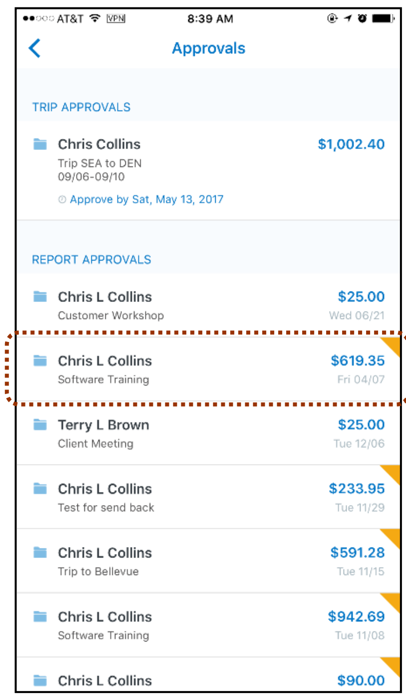
If the approval type does not have any approvals, then that type does not appear on the **Approvals** screen. For example, if there are no trips to approve, then **Trip Approvals** does not appear.

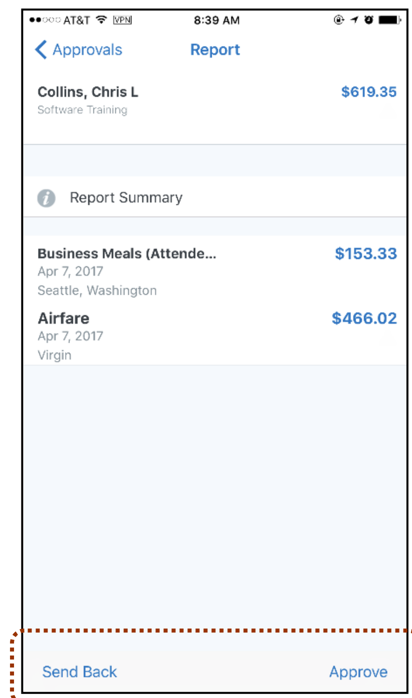
Expense Reports

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:

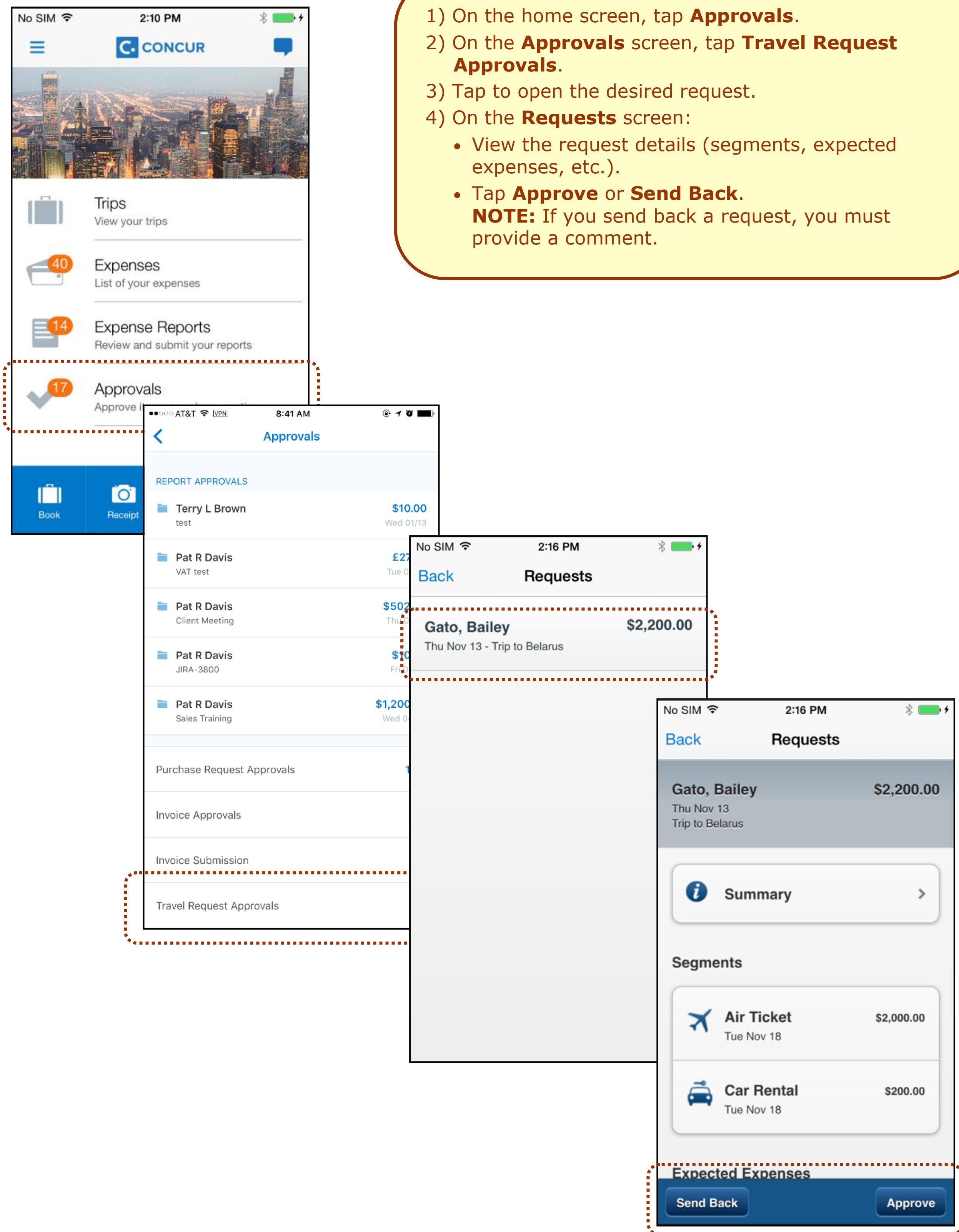
- Additional approver required to approve the report and send the report to the next approver in the workflow.

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

Requests

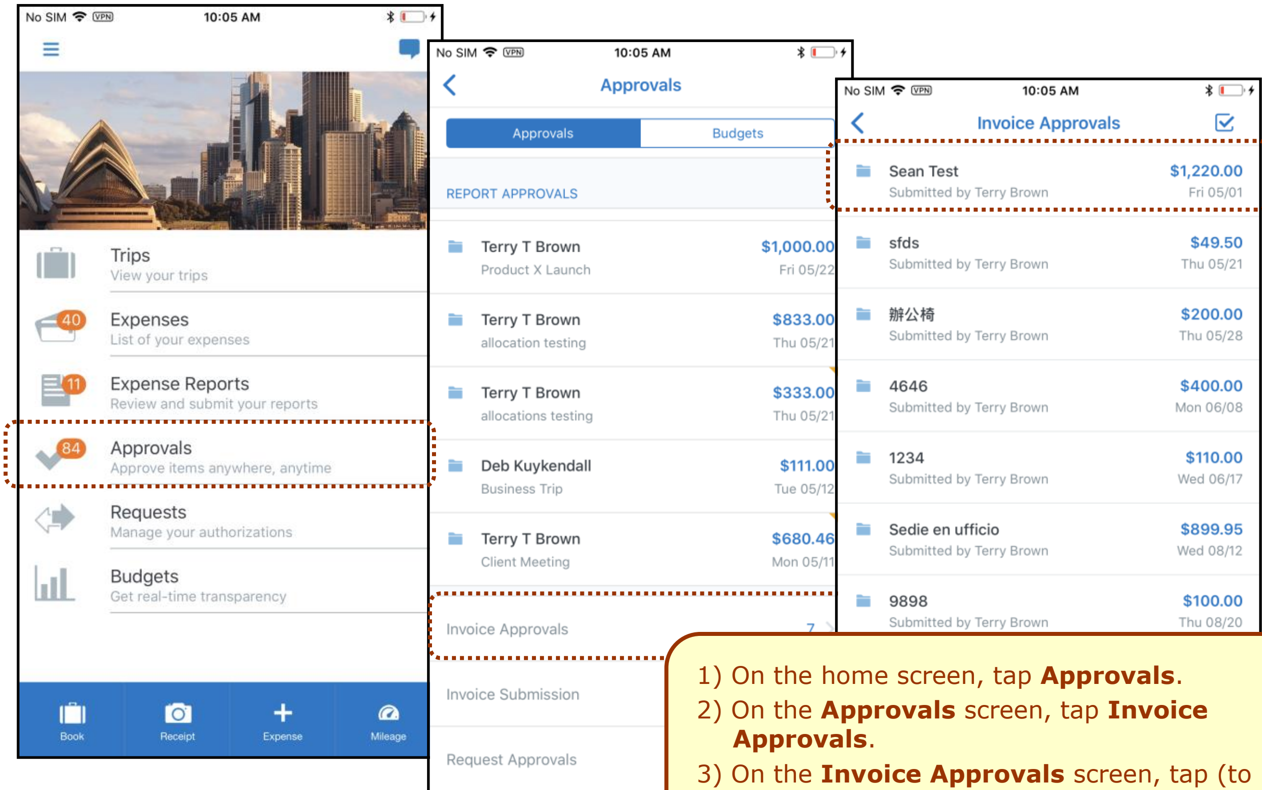
Use **Approvals** on the home screen to view and approve requests (if you are a request approver).

1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap **Travel Request Approvals**.
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 a request, you must provide a comment.

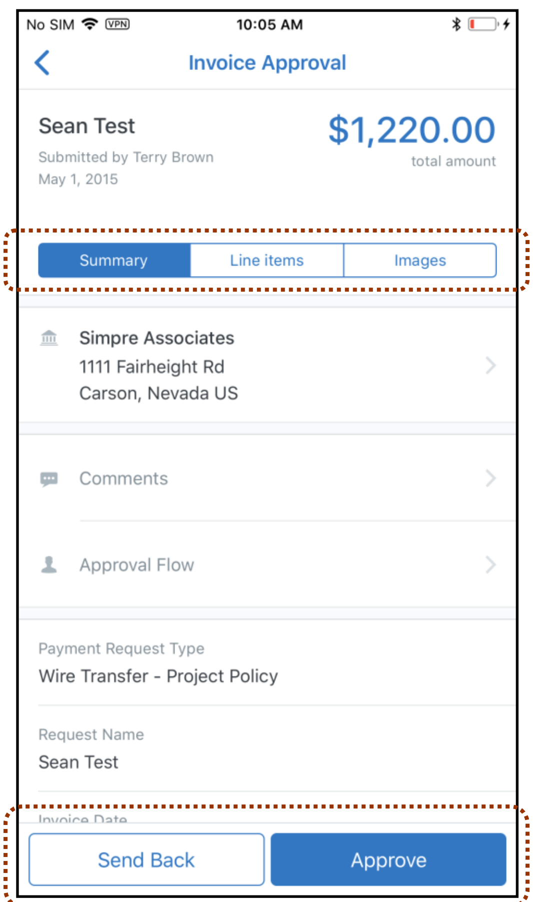


Payment Requests (Invoice)

Use **Approvals** on the home screen to approve payment requests (if you are an approver).
NOTE: This also includes Cost Object Approvals and Authorized Approvals.

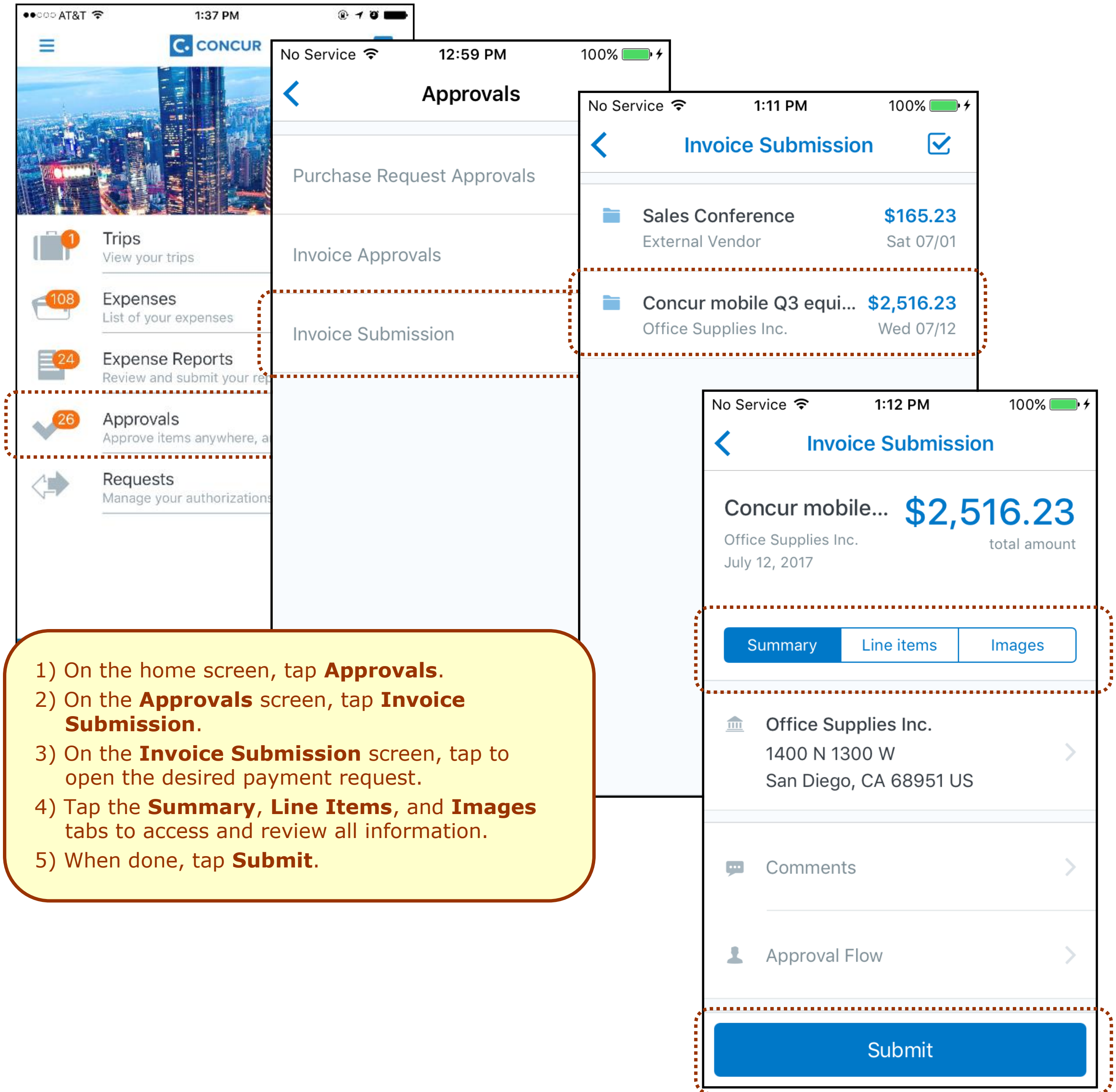


1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap **Invoice Approvals**.
3) On the **Invoice Approvals** screen, tap (to open) the desired invoice.



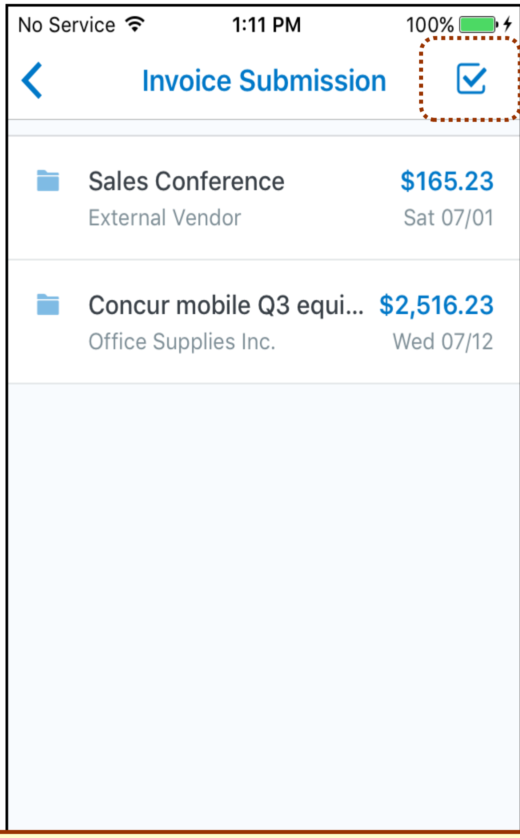
4) On the **Invoice** screen, on the **Summary** tab:
   - Tap **Comments** to review or add comments.
   - Tap **Approval Flow** for the approval information.
   - Tap the vendor name for vendor details.
5) On the **Invoice** screen, on the **Line Items** tab, tap the desired line item.
6) On the **Item Detail** screen:
   - Review the quantity, price, image, etc.
   - Tap **Distributions** to view the percentages.
7) On the **Invoice** screen, on the **Images** tab, view the invoice image.
8) When ready, tap **Approve** or **Send Back**.
   NOTE: If you send back a request, you must provide a comment.

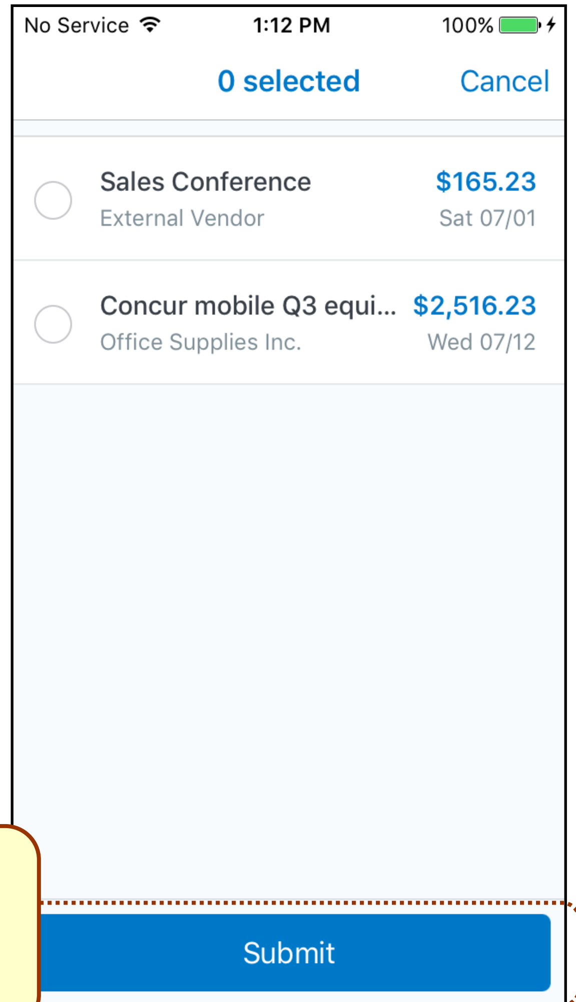
View and Submit Payment Requests



1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap **Invoice Submission**.
3) On the **Invoice Submission** screen, tap to open the desired payment request.
4) Tap the **Summary**, **Line Items**, and **Images** tabs to access and review all information.
5) When done, tap **Submit**.

Submit One or More Payment Requests

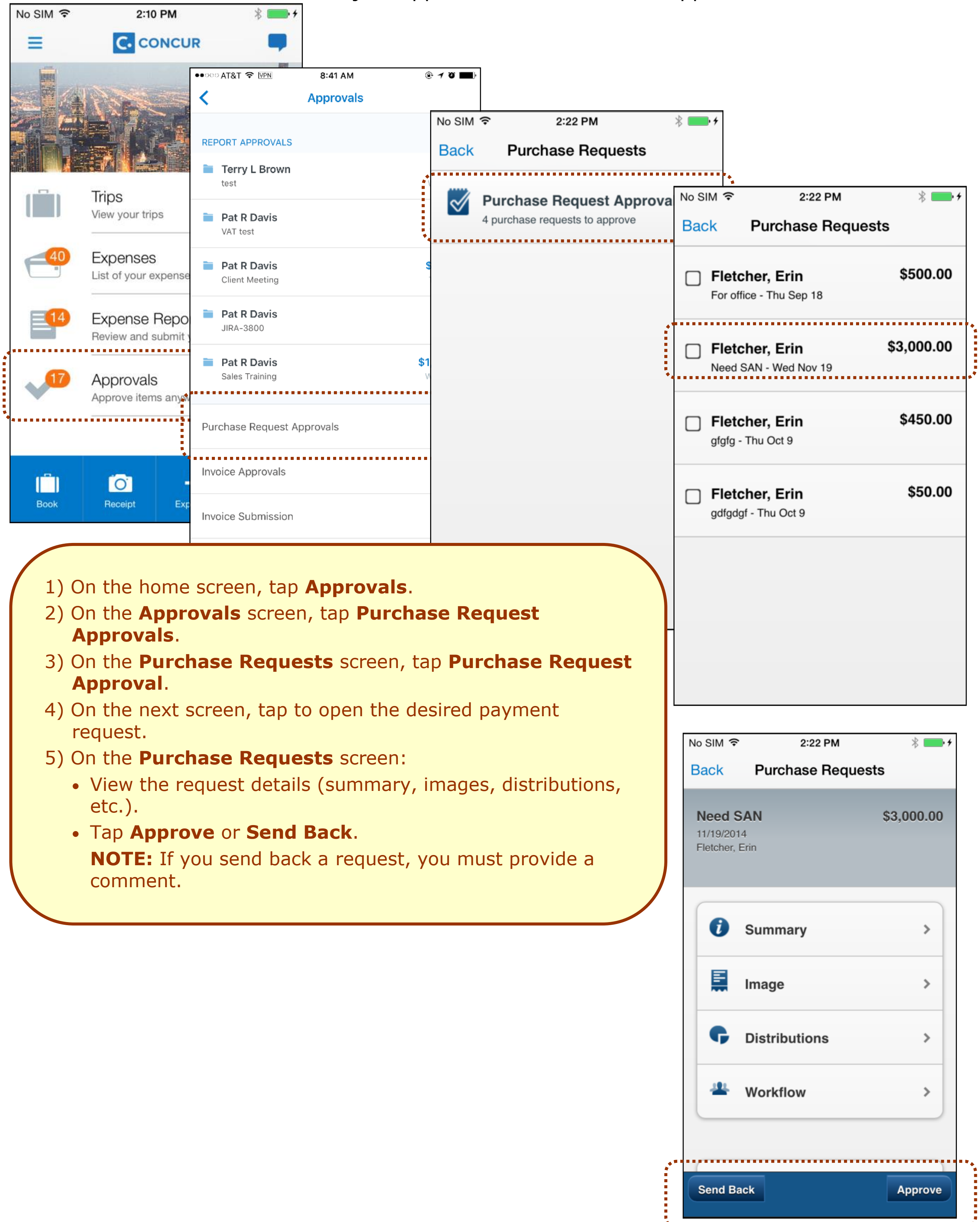




1) On the **Invoice Submission** screen, tap ☑ (upper-right corner). A selection circle appears to the left of each payment request.
2) Tap the desired selection circles.
3) Tap **Submit**.

Purchase Requests (Invoice)

Use **Approvals** on the home screen to approve purchase requests (if you are an approver).
NOTE: This also includes Cost Object Approvals and Authorized Approvals.

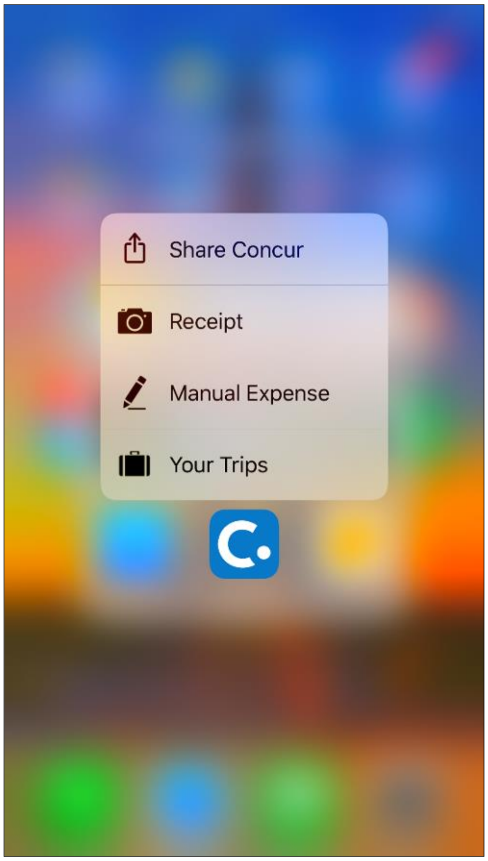


1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap **Purchase Request Approvals**.
3) On the **Purchase Requests** screen, tap **Purchase Request Approval**.
4) On the next screen, tap to open the desired payment request.
5) On the **Purchase Requests** screen:
   - View the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

   NOTE: If you send back a request, you must provide a comment.

3D Touch Support – iPhone 6s and 6s Plus

For users with iPhone 6s and 6s Plus devices, the Concur mobile app provides these options for the 3D Touch.



Press the Concur icon in the device's apps list, the menu appears.

Using the menu, you can share the Concur mobile app with friends, quickly take a picture of the receipt, create an expense manually, or view the current trip (if any).

Press an expense in the expense list (**Expenses** screen), the associated receipt appears.

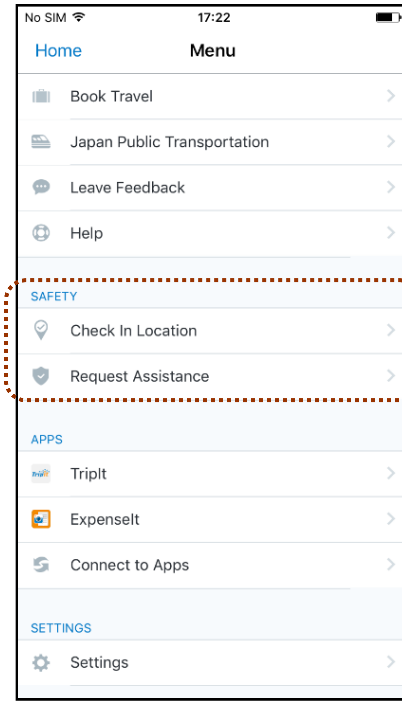
A menu also appears so you can add the expense to a report or delete it from the device.

Concur Locate

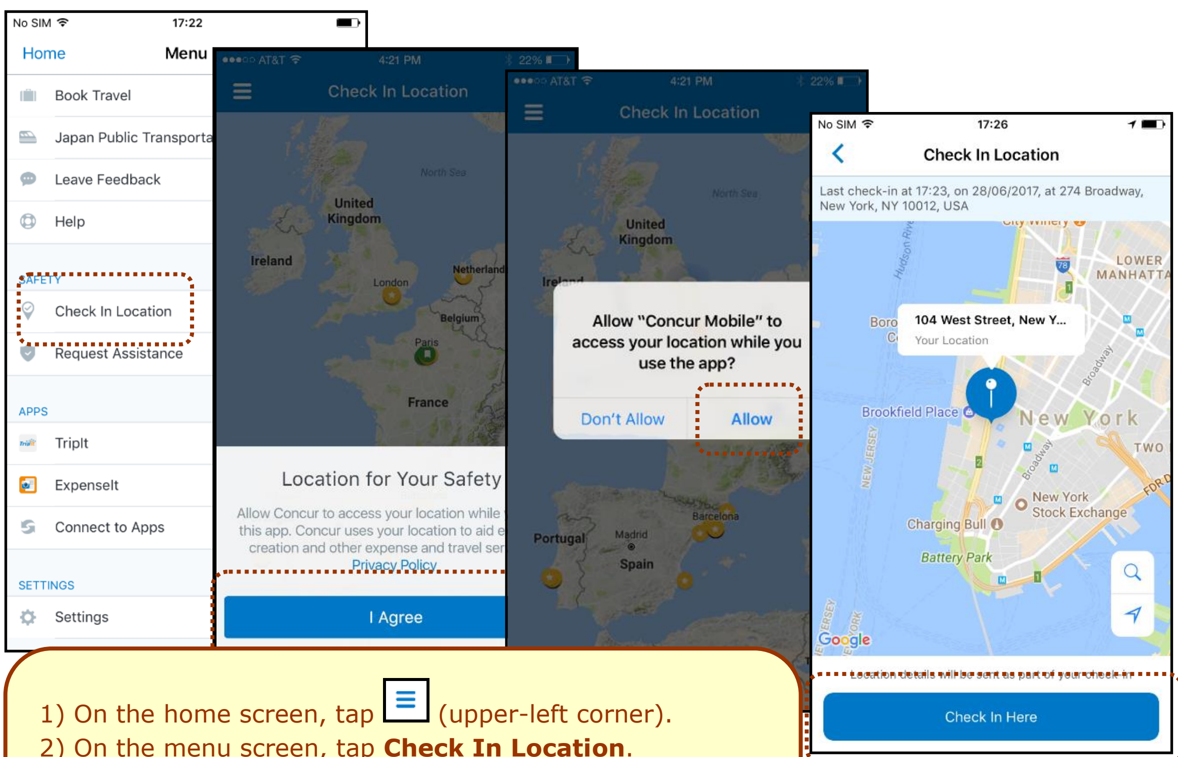
Check-in With Location Check In or Request Assistance

If your company uses Concur's messaging service, you can send your check-in location details to your company or request assistance using your mobile device.

NOTE: While your mobile device is offline, the Concur mobile app keeps and displays your previous check-in location details.

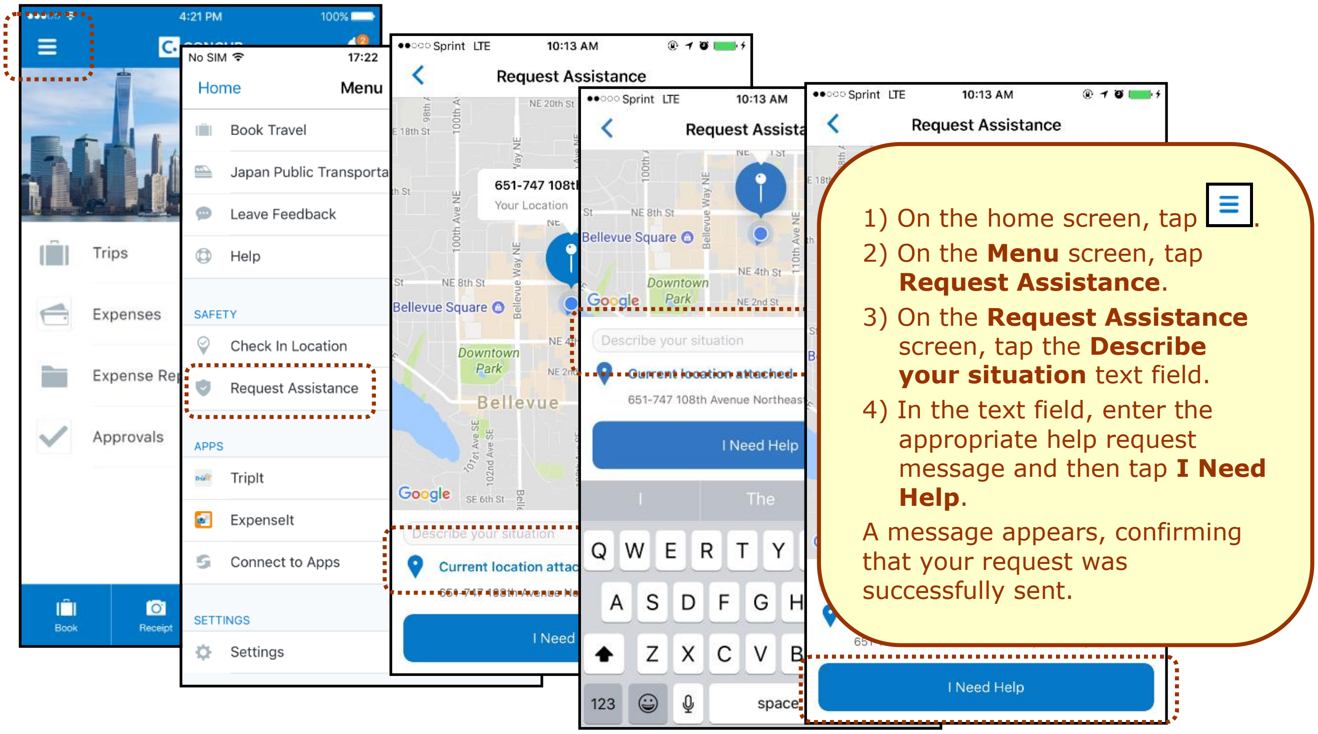


On the **Check In Location** screen, you can check-in to your current location only while your mobile device is online.



1) On the home screen, tap (upper-left corner).
2) On the menu screen, tap **Check In Location**.
3) On the **Location for Your Saftey** window, tap **I Agree**.
4) On the **Allow "Concur Mobile" to access your location while you use the app?** window, tap **Allow**.
5) On the **Check In Location** screen, tap **Check In Here**.

On the **Request Assistance** screen, you can request assistance only while your mobile device is online.

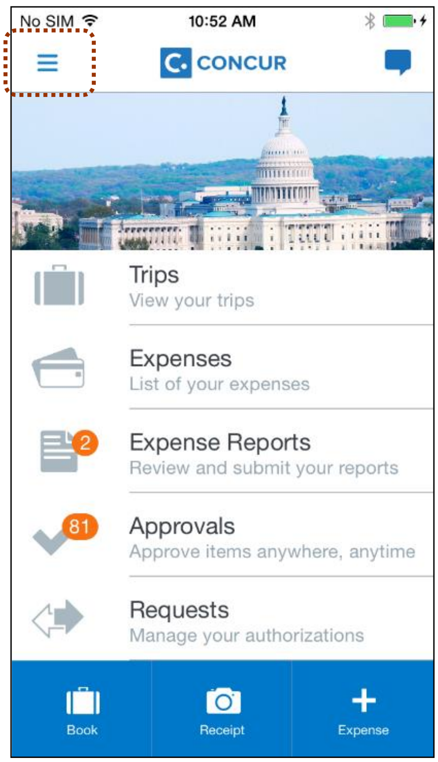


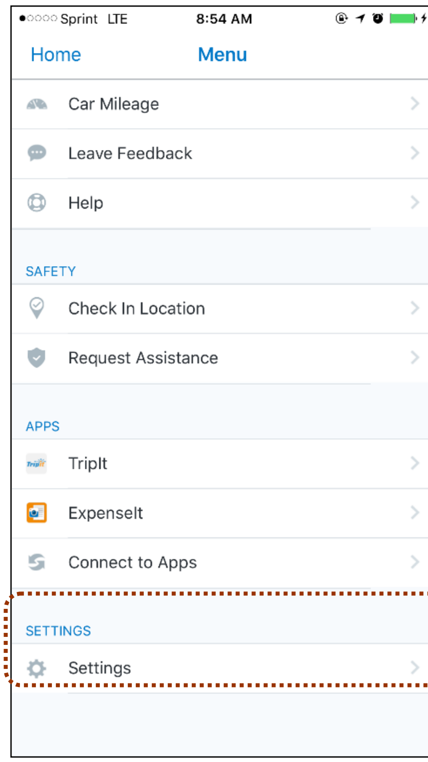
Settings / Help / Feedback

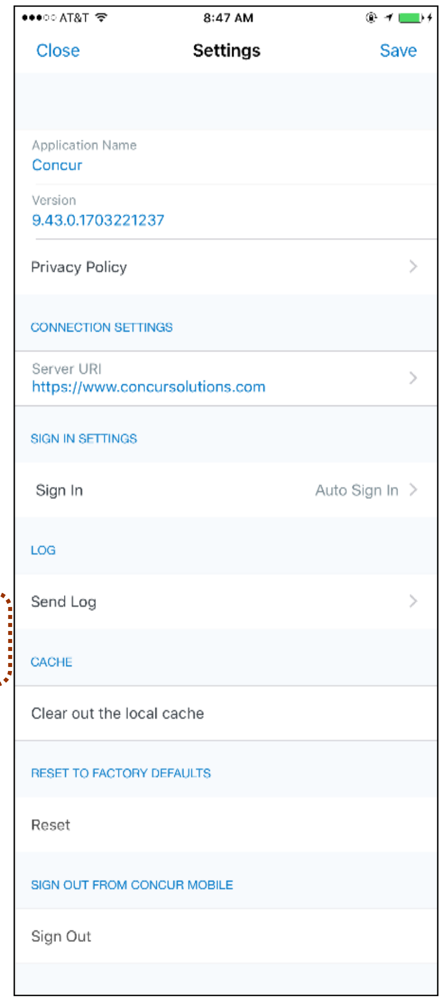
SETTINGS

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

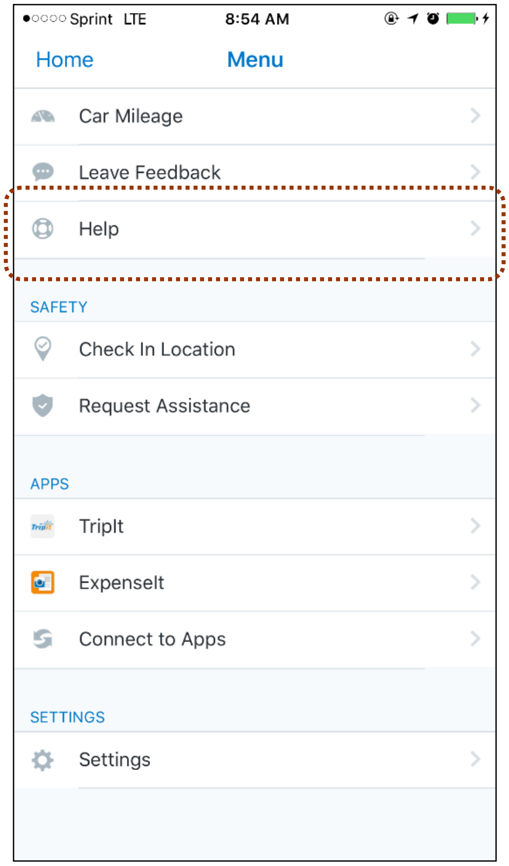


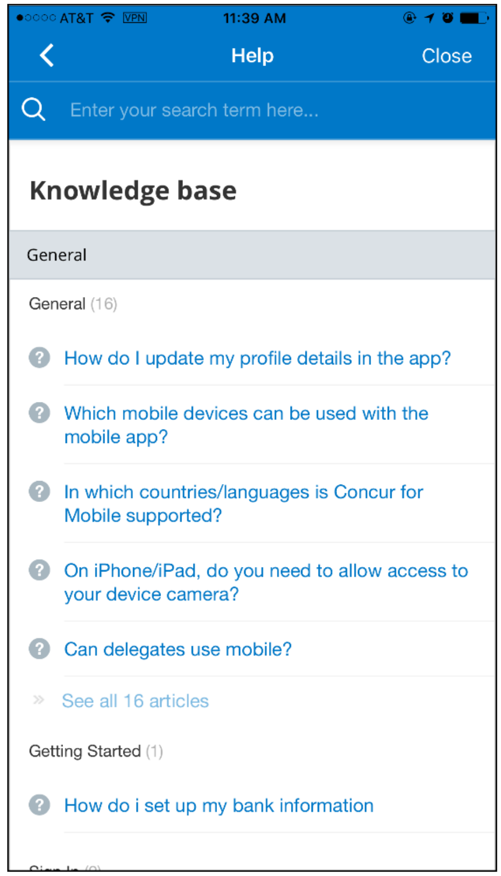




Get Help

Use **Help** on the **Menu** screen to search for help topics or find helpful articles.





Leave Feedback

Use **Leave Feedback** on the **Menu** screen to send feedback.