# Introduction to..... Concur for Mobile – iPhone<sup>®</sup> Version 9.17.0 – December 30 2014



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, and payment requests (Invoice).

#### Applies to these Concur solutions:

- ☑ Expense in Travel & Expense
- ⊠ Travel
- ☑ Travel in Travel & Expense
- 🗵 Invoice
- 🗵 Request

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#### 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



## 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:
  - Image: (lower-left corner) or –
  - = (upper-left corner) and then **Book Travel**

– or –

• On the **Trips** screen, tap:

Book Air	
Book Hotel	
Book Car	
Book Rail	

Book a Trip - or -٠ Then: + (upper-right corner) 1) On the **Book Air** screen: No SIM 穼 2:00 PM \* 🕞 + • Tap One Way or Round Trip. • Enter the search criteria. Trips Book Air Search • Tap Search (upper-right corner). One Way 2) On the Results Summary screen, tap the desired carrier. **Departure City** Seattle Tacoma Intl Arpt, Seattle № SIM ? 2:02 PM \* 💽 + 3) On the next screen, tap the desired flight. Arrival City Book Air Results Summary Dallas Ft Worth Intl, Dallas, TX ( 4) On the Flight Details screen: (SEA) Seattle, WA to (DFW) Dallas, TX Departure Date • Review for accuracy. Tue Apr 28, 8:00 AM Apr 28, 2015 - Apr 30, 2015 • Fill in the fields (if any) and make **Return Date** the desired selections. See All \$1,022.20 Thu Apr 30, 2:00 PM 14 results Tap Reserve (upper-right corner). Class of Service Nonstop Economy **1 Refundable Only** No SIM ᅙ 2:02 PM \* 💽 + Tap Microphone to start voic **〈** Back Nonstop US Airways \$1.2 6 results (SEA) Seattle, WA to (DFW) Dallas, TX \* 🕞 + 2:03 PM Apr 28, 2015 - Apr 30, 2015 No SIM 穼 🛹 All Nonstops \$1. Konstop Flight Details Reserve 🝘 Alaska Airlines \$1,134 SEA Tue 7:00 AM DFW Tue 12:45 PM 1 Stop 3h 45m / 0 Stops (SEA) Seattle, WA to (DFW) Dallas, TX DFW Thu 1:40 PM SEA Thu 3:59 PM 🛫 Multiple Carriers Apr 28, 2015 - Apr 30, 2015 \$1,0 4h 19m / 0 Stops (Apollo) (Refunda DEPARTURE 🕼 Alaska Airlines \$1.3 1 results 🚼 Alaska Airlines 658 DFW Tue 12:45 PM SEA Tue 7:00 AM 3h 45m / Stops: 0 / Economy (Y) RETURNING 🕼 Alaska Airlines 661 DFW Thu 1:40 PM SEA Thu 3:59 PM 4h 19m / Stops: 0 / Economy (Y) Total Price \$1.134.20 (Refundable) Tap here Card to sort Sort 1 results by Fare Price Chris test Collins \*\*1111

#### 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).

No SIM ᅙ	2:18 PM	* 💼 +
<b>&lt;</b> Back	Car Rental	Search
Airport Loca Dallas Ft Wo	ation rth Intl, Dallas, TX (D	FW)
Pick-up Dat Tue Apr 28,	e 12:45 PM	>
<b>Drop-off Da</b> Thu Apr 30,	te 1:40 PM	>
Car Type Economy		>

#### 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.

**Book Air** 

**Book Hotel** 

**Book Car** 

**Book Rail** 

• Tap **Reserve** (upper-right corner).

No SIM 🗢 2:19 PM	* 🗾 + +
Car Rental Select Ca	r
Cars near Dallas Ft Wor Tue Apr 28, 2015 - Thu Ap	<b>th Intl, Dallas</b> or 30, 2015
Enterprise	enterprise
Economy Car Automatic transmission (Apollo)	<b>\$47.00</b> per day >
Ez Rent A Car	E-Z
Economy Car Automatic transmission (Apollo)	<b>\$25.00</b> per day >
Economy Car Automatic transmission (Apollo)	<b>\$25.00</b> per day >
Budget	Budget
Economy Car Automatic transmission (Apollo)	<b>\$34.65</b> per day >
Economy Car Automatic transmission (Apollo)	<b>\$34.65</b> per day >
Sort 20 results by Preferred	Vendors

.....

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



## 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:



#### 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:

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



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<b>&lt;</b> Home	Hotel Search	Search
Location Seattle Taco	ma Intl Arpt, Seatt	le, >
Check-in Tue Feb 24	, 2015	>
Check-out Thu Feb 26	6, 2015	>
Find hotels v 5 miles	vithin	>
With names Marriott	containing	>
Tap Microp	phone to start voi	ce search
	Ų	





# Cancel a Hotel or Rental Car Reservation



## 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**.

No SIM 🗢	4:42 PM 🕴 🔳 🔿	No SIM 🗢 5:08 PM 🛞 ■D-	No SIM 중 5:02 PM 🕴 ➡ +
=	C. CONCUR	Key Home Trips	Trips Travel Agency Info
		Awaiting Approval	
/		Trip from Seattle to Boston	Agency Name
MIRIC		Awaiting approval.	
		Approval of Request Required	
1-10	Trips		Day Phone
	View your trips		444.444.4545
37	Evnansas		
	List of your expenses		Daytime Message
			Agency Hours:
	Expense Reports Review and submit your reports		<ul> <li>Monday - Friday 6:00 am - 10</li> </ul>
			○ Saturday: 9:00 am - 5:00 pm
14	Approvals		
			Phone: ### 662-6248
			<ul> <li>Press '1' for Cligbook Technil</li> </ul>
	4		• Press '2' for Assistance from
Receipt	Expense Mileage	Travel Agency Info	

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## 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.



#### Check-in with Locate & Alert



## 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 ٠ 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 ٠ transaction to an expense report then edit.
  - To delete a card transaction, use the web version of Expense, if your company ٠ allows you to delete card transactions.
- View e-receipts, which can be edited once attached to a report.
- Attach expenses *mobile* expenses, existing expense report.

#### 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



5:28 PM

**Home** Expenses Receipts

+

No SIM ᅙ

le expenses,	e-receipts, and o	ard trar	ารส	actions – t	o a new	or
ports	No SIM	* •	••+			
ense expense	Sales training Not Submitted Nov 20, 2014	\$12.00	>	No SIM 🗢	6:08 PM	* 💼 +
r <b>ts</b> screen, , date,	Training Supplies Not Submitted Aug 6, 2014	\$0.00	>	C Back	Report	+
ou can	Public Transport Not Submitted Mar 5, 2014	\$1,432.82	>	Feb 26, 2014 Sent Back to Emp	loyee	
ense	Office Supplies Not Submitted Feb 27, 2014	\$200.00	>	🕖 Report Su	mmary	
: summary	Trip to France Sent Back to Employee - Davis, Pat Feb 26, 2014	\$1,119.00	>	View Rece	ipts	
· · · · · · · · · · · · · · · · · · ·	Submitted Reports	•••••				
images	test for chris-approver Submitted & Pending Approval - Da Nov 20, 2014	<b>\$15.32</b> vis, Pat	>	<b>Airfare</b> Mar 14, 2014 Alaska Airlines, Se	attle, Wash	\$1,104.00
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All active repo <b>Unsubmitted</b> sections. With	l orts are separated i <b>I, Submitted</b> , and iin each category, t	into <b>Other</b> the				
reports are so	orted by report date	9.	L			Submit
014	Concur for Mob	<i>ile –</i> iPho	one	e®	Page	e 11 of 2!

#### Create a Mobile Expense

To create a mobile expense:

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

Expenses

- On the home screen, tap List of your expensions
   then on the **Expenses** screen, tap +.
- Then: 1) On the **Expense** screen, fill in the fields and make the desired selections.
- 2) Tap Add Receipt.
- 3) Take a picture of the receipt or grab an existing image from the Photo Album or the Receipt Store.
- 4) Tap **Save**.

No SIM ᅙ	5:26 PM	* 💶 +
<b>〈</b> Expenses	Expense	Save
- Add Rec	eipt	·····>
Type *		
Breakfast		>
Amount * 14.23		>
Currency * US Dollar		>
Date * Mon Dec 29 2	2014	>
Location Bellevue, Was	shington	>
Vendor Starbucks		>
Comment		>
Comment		/



#### 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.

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





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## 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)



## 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.



US Dollar

- 1) On the home screen, tap **www** (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.



lo SIM 奈	9:59 AM	* 💷 +	] [	No SIM ᅙ	10:00 AM	* 🗖	D +
K Back	Report	+		Report	Expense Details	Sav	/e
Client Meet Sep 25, 2014 Not Submitted	ing	\$733.95 <b>A</b>		Undefine Mar 14, 201 Office Warehou	<b>d</b> 4 use, Seattle, Washington	\$68.2	3
				Add E	Receipt	1) C	on the <b>Active</b>
Report :	Summary			Addi	leccipt	R tz	<b>Reports</b> screen,
Add Ree	ceipt			The entry b	try has Undefined exp ust select an expense efore you can submit	d	lesired report.
<b>Airfare</b> Dec 5, 2014 Alaska Airlines,	, Miami, Florida	\$574.20		report.	elore you can submit	2) C s	In the <b>Report</b> creen, tap to
<b>Undefined</b> Mar 14, 2014		\$68.23		Expense Ty Undefined	rpe *	e	expense.
Office Warehou <b>Dinner</b>	ise, Seattle, W	\$45.76		Transactior Fri Mar 14	Date 2014	3) C s	on the <b>Expense</b> creen:
Mar 14, 2014 Cafe Monte, Se	eattle, Washing		Business Purpose	E	<ul> <li>Make the desired</li> </ul>		
Dinner		\$45.76					changes.
		Submit				•	Tap <b>Save</b> .

## Itemize an Expense

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



Transaction Date \*

No SIM 🗢	10:45 AM	* 💻 +	No SIM 🗢	11:17 AM	* 📥 +	No SIM 🗢	10:46 AM	* 🔲 +
Back	Itemizations	+	< Itemization	s Itemization	Save	< Back	Itemizations	+
<b>Room Rate</b> Dec 29, 2014 ·	- Marriott Hotel	\$150.00	Expense Type Incidentals	*	>	<b>Room R</b> Dec 29, 20	<b>ate</b> )14 - Marriott Hotel	\$150.00
<b>Room Tax</b> Dec 29, 2014	- Marriott Hotel	\$25.00	Transaction Da Thu Dec 18 2	ate * 014	>	<b>Room T</b> Dec 29, 20	<b>ax</b> 014 - Marriott Hotel	\$25.00
Room Rate Dec 28, 2014	- Marriott Hotel	\$150.00	Business Purp	ose	>	<b>Room R</b> Dec 28, 20	<b>ate</b> 014 - Marriott Hotel	\$150.00
<b>Room Tax</b> Dec 28, 2014	- Marriott Hotel	\$25.00	City Seattle Wash	ington		Room T Dec 28, 20	<b>ax</b> 014 - Marriott Hotel	\$25.00
			Currency US, Dollar	ington		Dec 18, 20	<b>als</b> 014 - Marriott Hotel	\$25.28
			Payment Type Cash					
			Amount * 25.28		>			
li B	temized: \$350.00 emaining: \$25.28	3	lte Re	emized: \$375.28 emaining: - <b>\$0.00</b>			Itemized: \$375.28 Remaining: -\$0.00	} )

Other Room Tax 2

Itemized: \$0.00 Remaining: \$375.28

## Add Attendees to an Expense

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



## Attach Receipts

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



#### View Receipt Store Images

You can easily view your images in the Receipt Store.



#### 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



#### **Refresh Data**

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





No SIM ᅙ

Nov 5, 2014

Sep 30, 2014

**Client Meeting** 

1:30 PM

+

\$541.28

Delete

\$0.00

\$44.90

\$0.00

## Delete an Unsubmitted Expense Report

+**K** Home Active Reports **K** Home Active Reports 1) On the Active Reports screen, slide **Unsubmitted Reports Unsubmitted Reports** the desired report to the left. The Conference Conference \$541.28 **Delete** button appears. Dec 17, 2014 2) Tap Delete. Dec 17, 2014 \$100.00 **Client Meeting** \$100.00 etina Dec 2, 2014 NOTE: Expenses on the report that are Guest User Example Re... Guest User Example Re. \$0.00 Not Submitte Nov 7, 2014 related to card transactions are not Nov 7, 2014 really deleted - they are returned to the **Client Meeting Client Meeting** \$44.90

No SIM 穼

Nov 5, 2014

Sep 30, 2014

**Client Meeting** 

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"pool" of card transactions. Cash

transactions are truly deleted.

\$0.00

1:30 PM

## Approvals

## Trips

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



- On the home screen, tap **Approvals**.
   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.

	No SIM ᅙ	2:10 PM	*	• +
	<b>&lt;</b> Home	Approval	s	
1	Trip Approva	als	•••••	
	Chris Collins Trip from Seattle Approve by: Tue N	e to Paris <b>1ay 12, 2015 0</b> 4	\$21,445.20	>
	Travel Requ	ests		
	1 travel reque	st to approve	Э	>
	Invoice App	roval		
	10 invoices to	review		>
	Purchase Re	equests		
	4 purchase re	quests to rev	view	>
	Report App	rovals		
	Peterson, Sur Office Supplies Sep 15, 2014	e	\$68.23	>

No SIM ᅙ	2:11 PM	* 💼 +
Approva	s Trip Approval	
Chris Colli Trip from Se Approve by: Tu	ns s attle to Paris Je May 12, 2015 04:00 PM	21,445.20 PDT
🕖 Violati	on Summary	
Wed May	13	
<b>★ 8:25</b> AM	Seattle to Dallas American Airlines 2252 Terminal Gate	2 >
<b>3:20</b> PM	<b>Dallas to Paris</b> US Airways 48 Terminal D Gate	>
Wed May	20	
<b>→ 10:05</b> AM	<b>Paris to London</b> Air France 1580 Terminal 2E Gate	>
<b>★ 1:05</b> PM	London to Seattle Air France 3570 Terminal 3 Gate	>
Reject		Approve

#### **Expense Reports**

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



**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).



## Payment Requests (Invoice)



## Purchase Requests (Invoice)



## 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



No S	IM ବି	5:07 PM	* 🗆	<b>1</b> +
Но	me	Menu		
(Ê	Book Trave	I		>
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