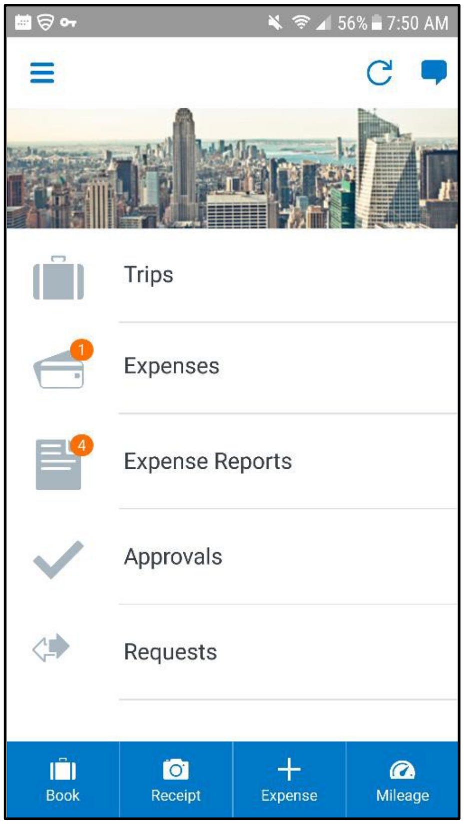
**Introduction to........**

# SAP Concur's mobile app – iPhone®

Version 9.61.x – October 12, 2018

Applies to these SAP Concur solutions:
☒ Expense in Travel & Expense
☒ Travel
☒ Travel in Travel & Expense
☒ Invoice
☒ Request




You can use SAP 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.

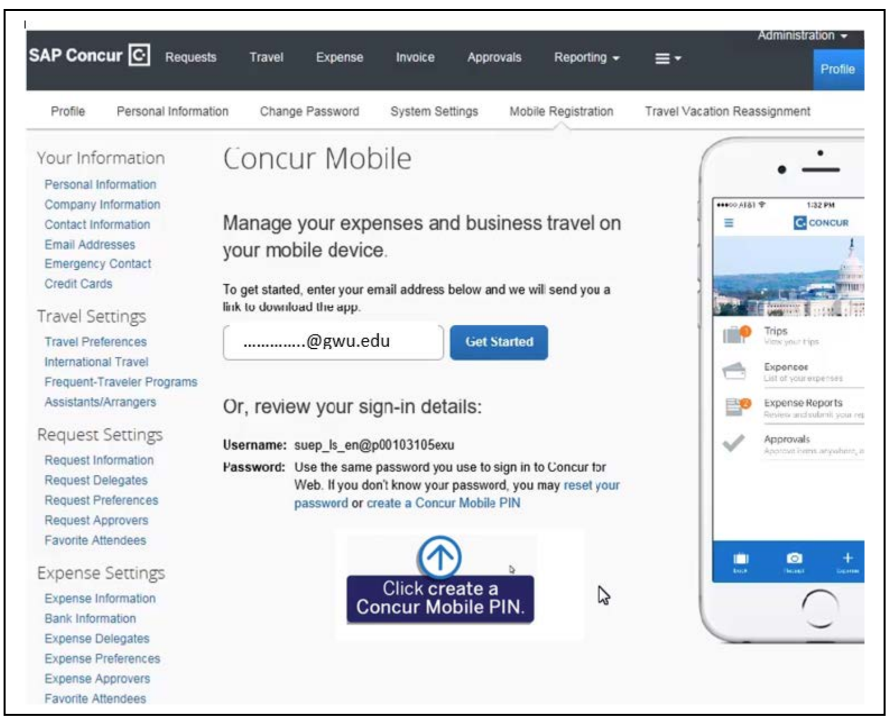
**THIS GUIDE** - This guide provides brief "how to" steps. It assumes that the user already knows how to use the web version of SAP Concur and already understands the concepts of Expense (expenses, itemizations, attendees, etc.), Travel (booking, rules, etc.), Invoice (payment requests, purchase requests, etc.), 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.

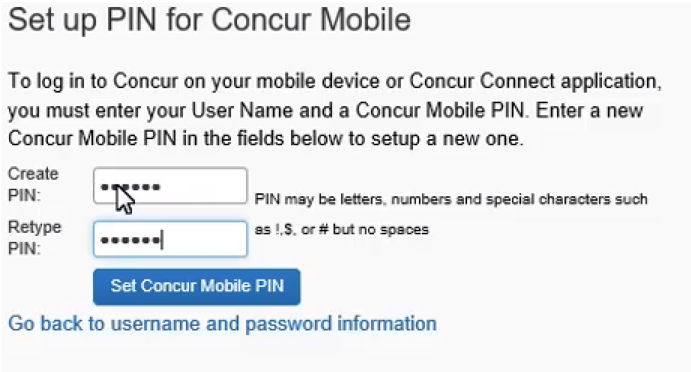
Both are available in online Help (end user and admin) in the web version of SAP Concur.

## Contents



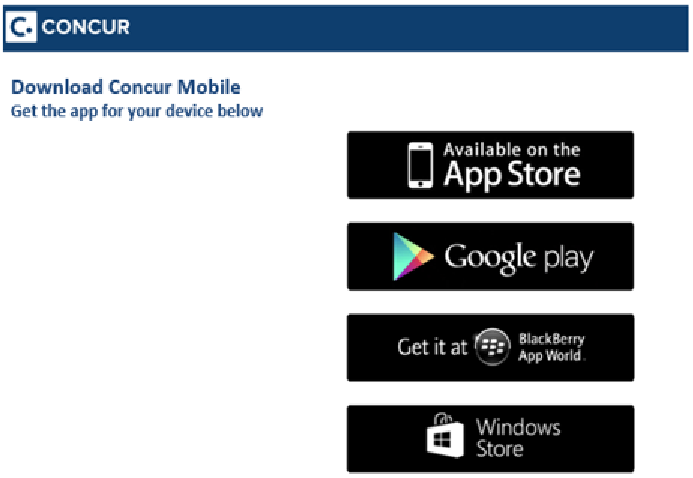
Initial login must be from a PC. Users should have their mobile device at hand to confirm that the download and access are successful. Log into iBuy Expense Reporting at https://ibuy.gwu.edu/ and click the GW iBuy + Expense icon. Select Profile > Profile Settings. Select the **Concur Mobile Registration** option and click **create a Concur Mobile PIN** (your mobile-only password). It's recommended to create a short memorable PIN, such as a 4-digit number.






Once you have set your PIN, click **Go back to username and password information**, enter your GW email address ______@gwu.edu, and click **Get Started**.

An email will be sent you with instructions on how to install and log in to Concur Mobile. Click Tap here to install Concur Mobile to bring up these mobile app options:




This is the Apple Store. You must have the iTunes app on your mobile device.

You must have the Google Play Store app on your device

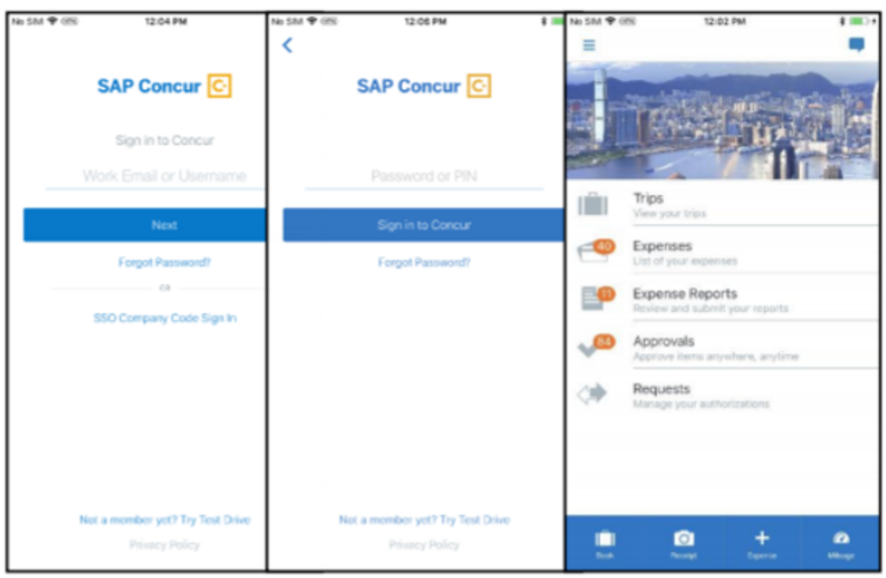
Not supported

Currently not supported

After the Concur app is downloaded, make sure you can log in and access the various features.

## Sign In

- **Locate and click on the Concur icon on your device.**
- **On the Sign in to Concur screen, enter your ______@gwu.edu email as your Login ID.**
- **Tap Next.**
- **On the next screen, enter your PIN password and tap Sign In to Concur.**




**NOTE:** SAP 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.

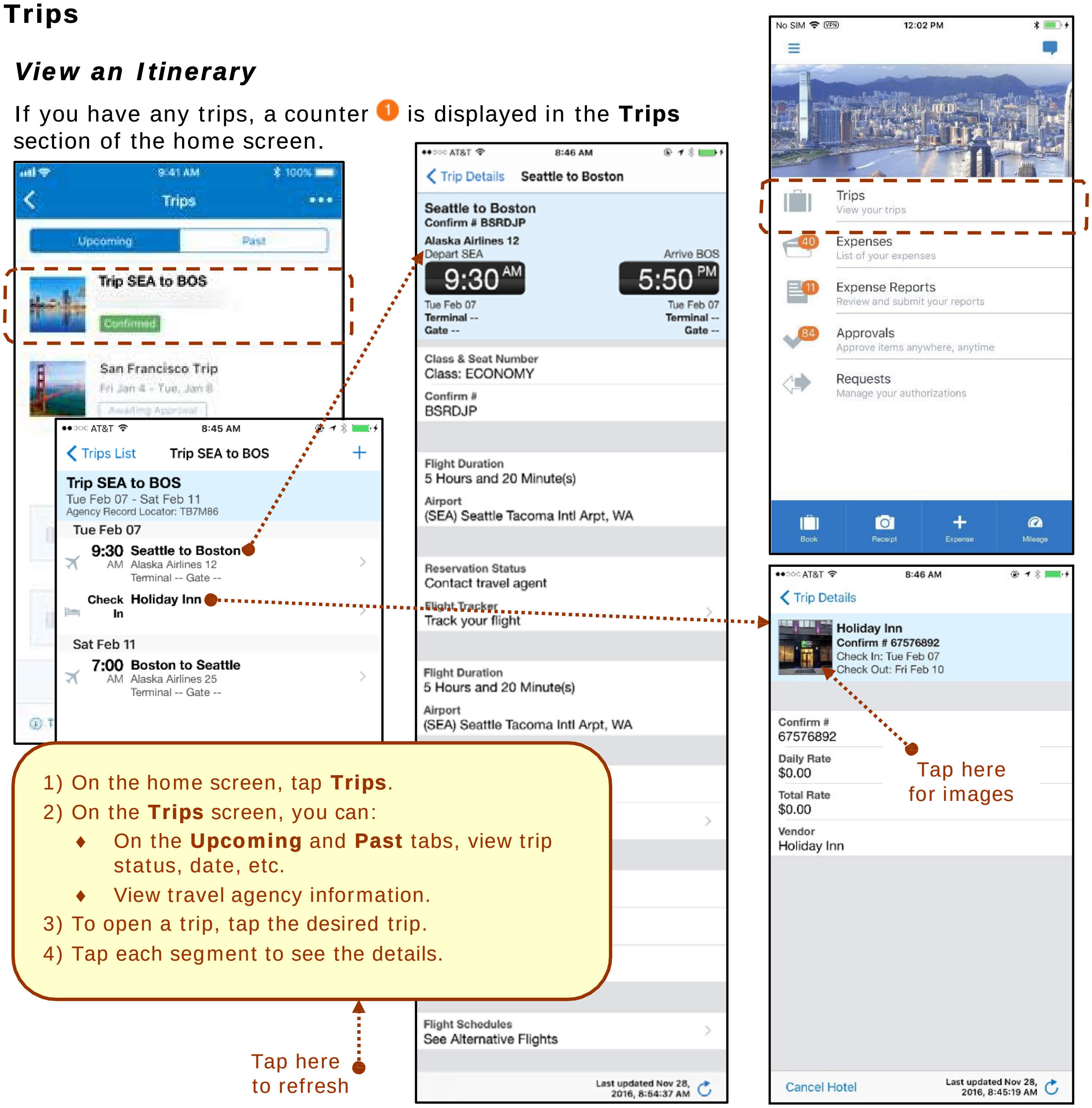
### Permissions

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 SAP 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 ① is displayed in the **Trips** section of the home screen.

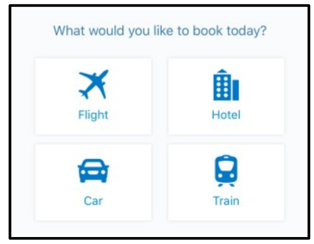



1) On the home screen, tap **Trips**.
2) On the **Trips** screen, you can:
   - On the **Upcoming** and **Past** tabs, view trip status, date, etc.
   - View travel agency information.
3) To open a trip, tap the desired trip.
4) Tap each segment to see the details.

## ***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:



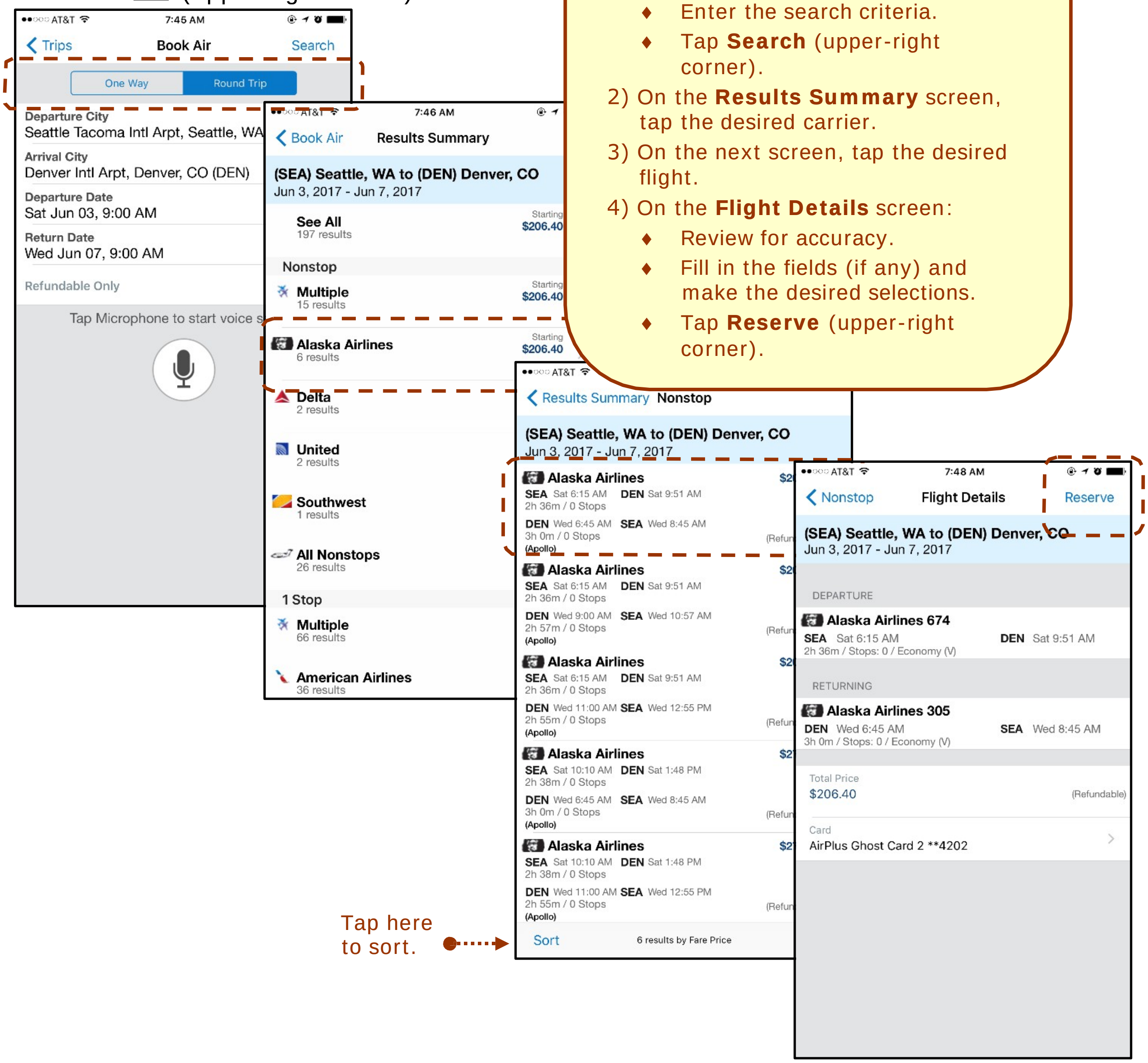

- On the home screen, tap:
  - ♦ Book (lower-left corner)
    *– or –*
  - ♦ (upper-left corner) and then **Book Travel**

*– or –*

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

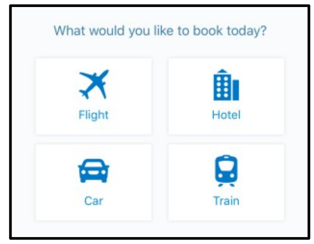
Then:

1) On the **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* –

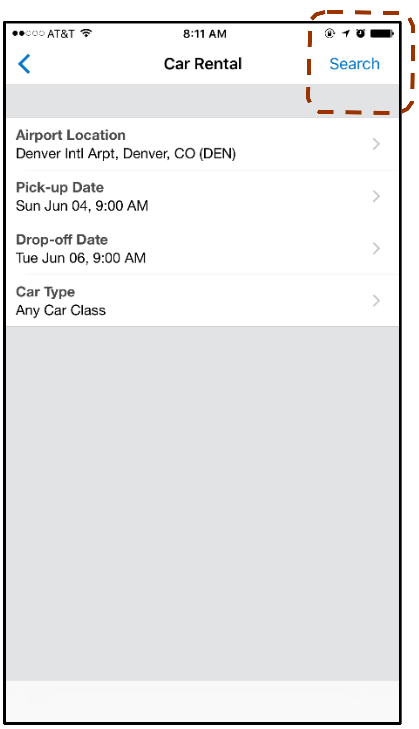
- On the **Trips** screen, tap:
  - ♦ **Book a Trip**
    – *or* –
  - ♦ (upper-right corner)

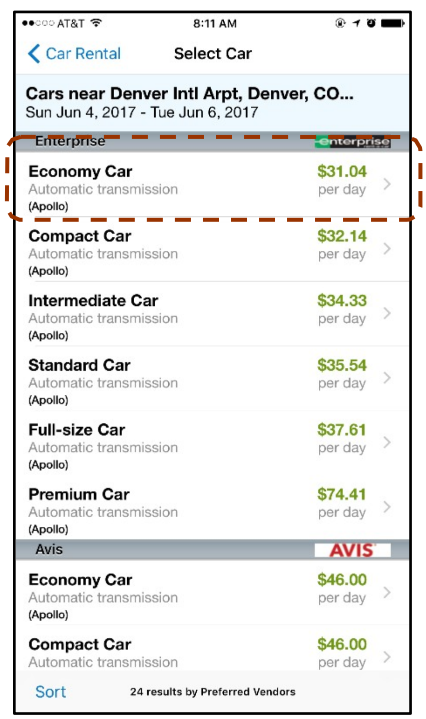
– *or* –

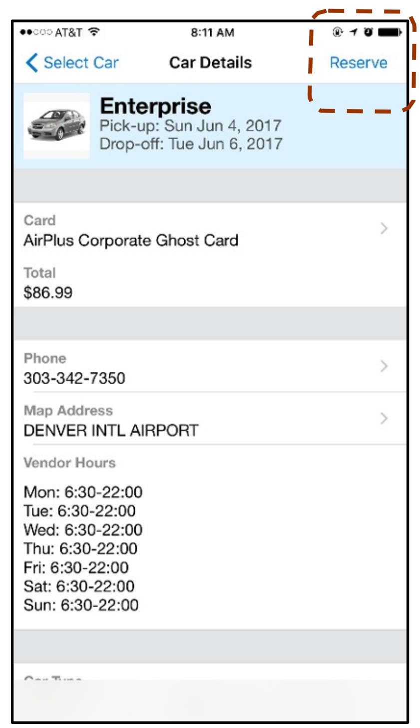
- To add a car to an existing itinerary, with the itinerary open, tap (upper-right corner).

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).

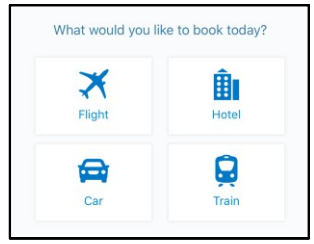



Depending on your company's configuration, you may not be able to book a car unless you are adding it to an existing itinerary.

## ***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* –

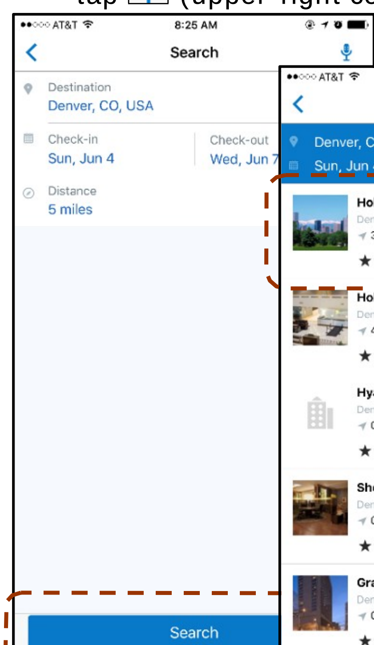
- On the **Trips** screen, tap:
  - ♦ **Book a Trip**
    – *or* –
  - ♦ (upper-right corner)

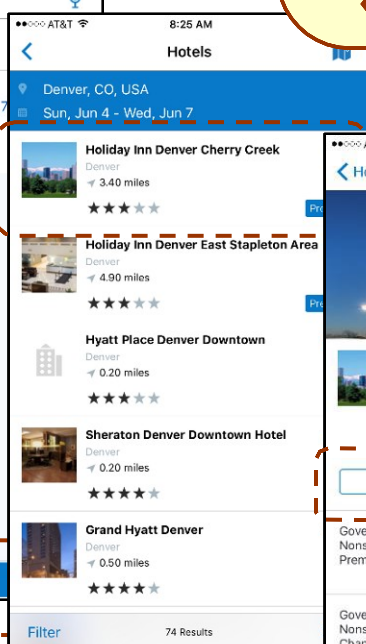
– *or* –

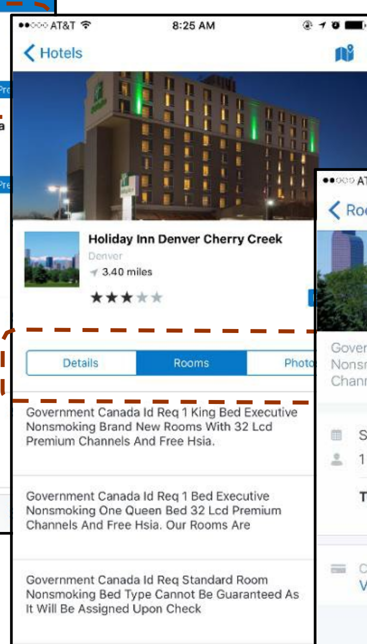
- To add hotel to an existing itinerary, with the itinerary open, tap (upper-right corner).

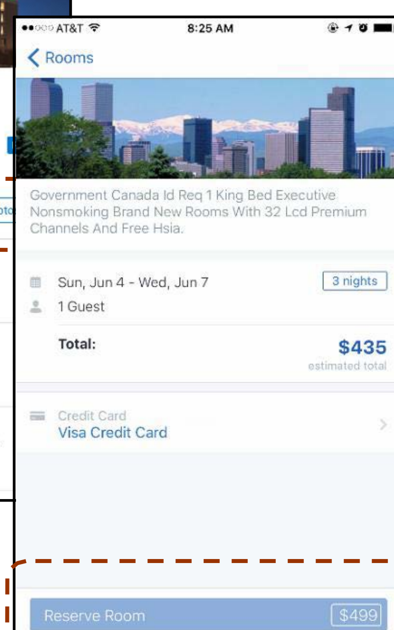
Then:

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).



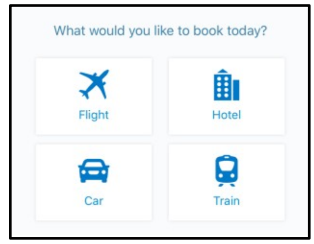




Depending on your company's configuration, you may not be able to book a hotel unless you are adding it to an existing itinerary.

### ***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:



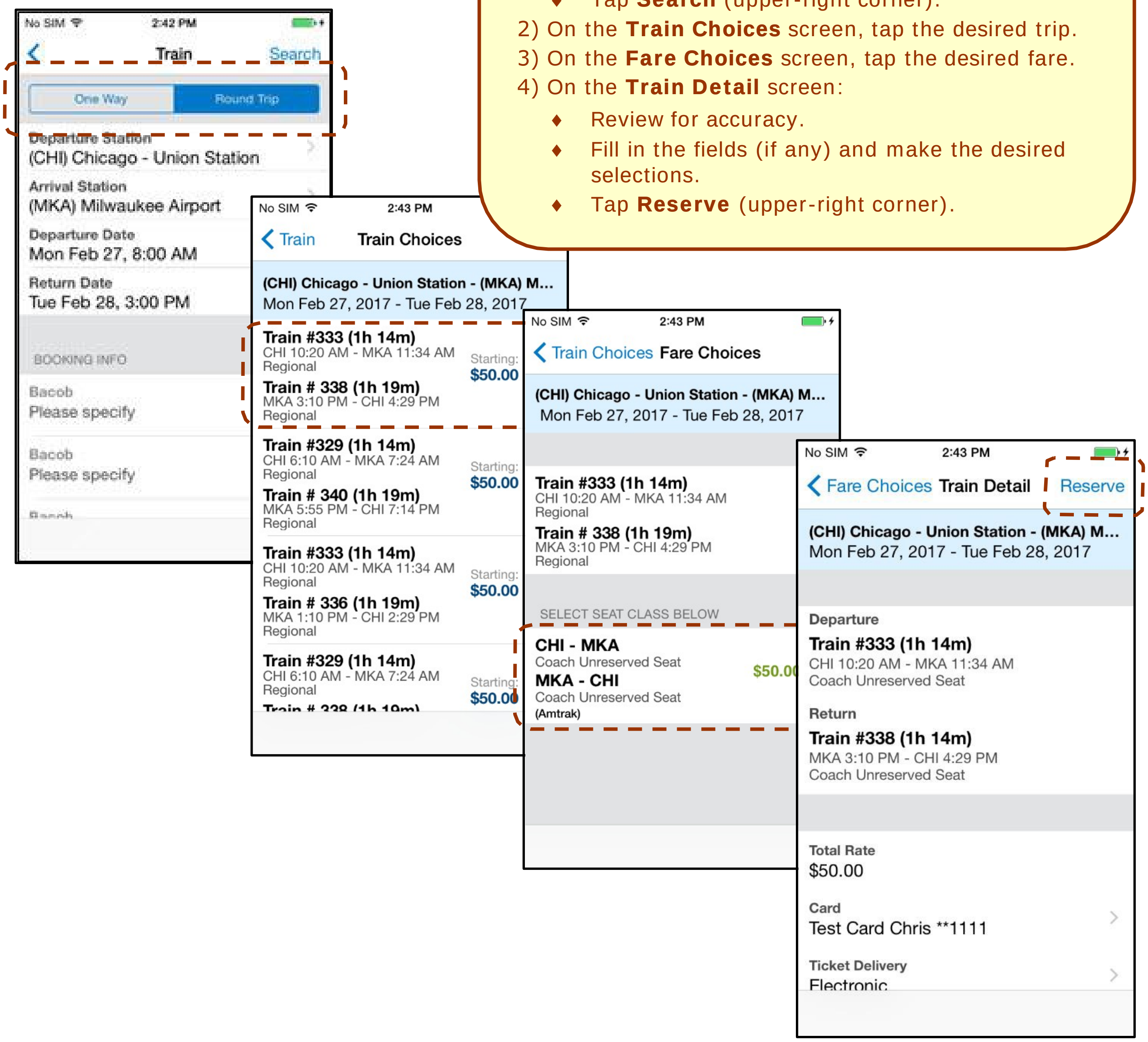

- On the home screen, tap:
  - ♦ Book (lower-left corner)
    *– or –*
  - ♦ (upper-left corner) and then **Book Travel**

*– or –*

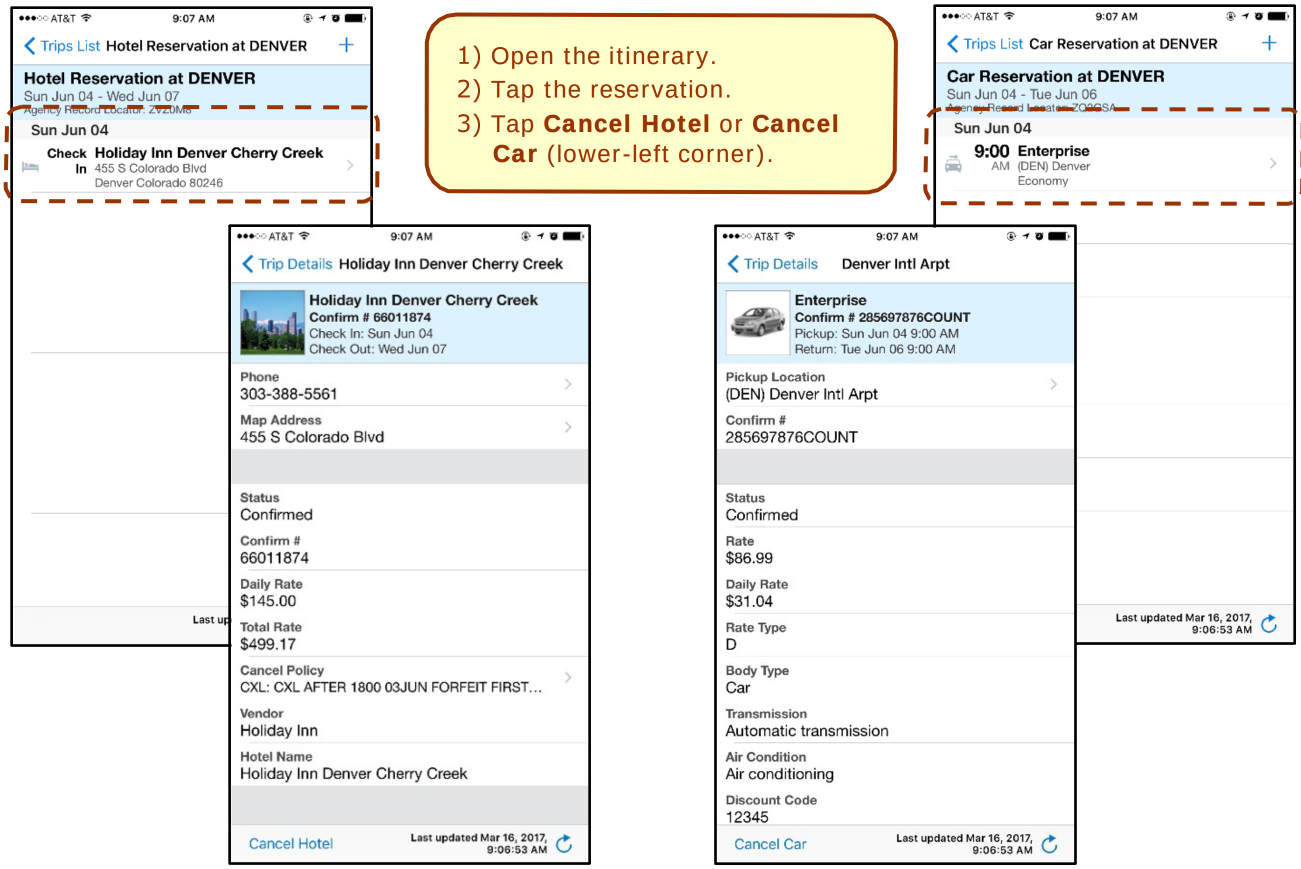
- On the **Trips** screen, tap:
  - ♦ **Book a Trip**
    *– or –*
  - ♦ (upper-right corner)

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).



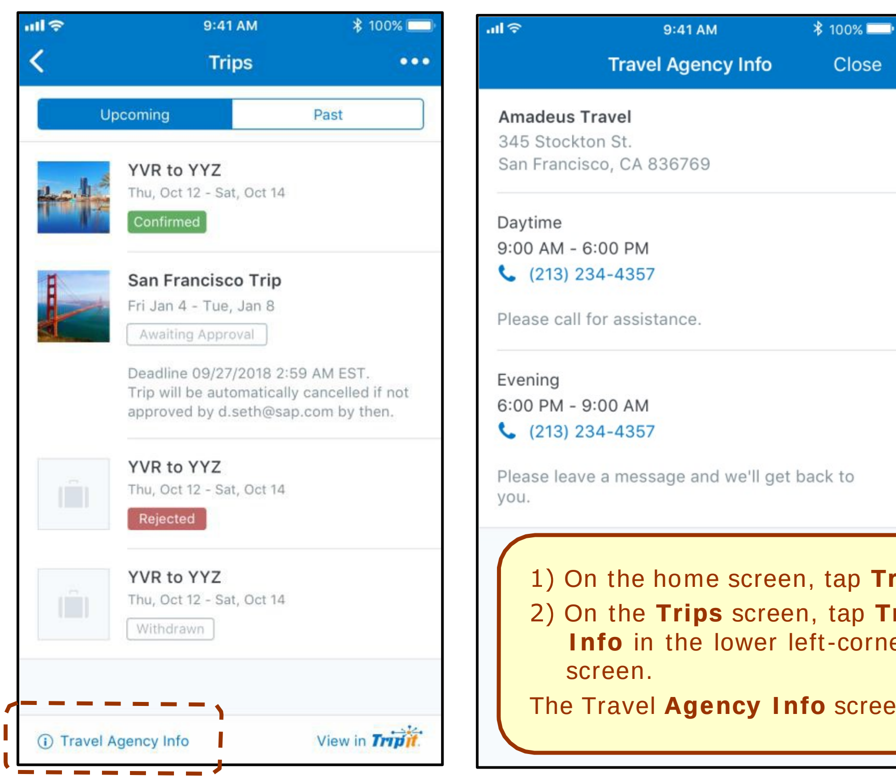
## Cancel a Hotel or Rental Car Reservation




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.



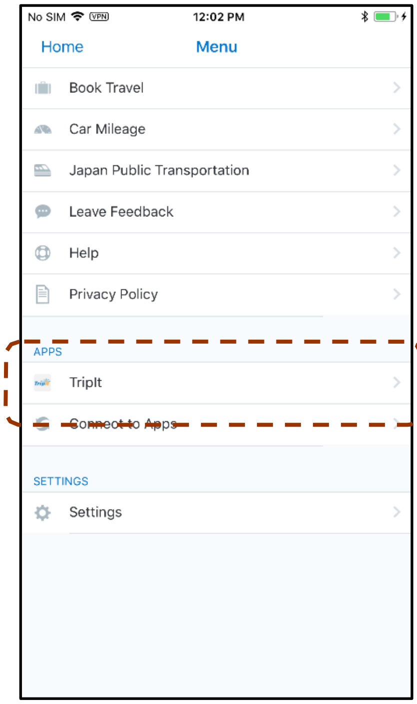

1) On the home screen, tap **Tr ips.**
2) On the **Trips** screen, tap **Travel Agency Info** in the lower left-corner of the **Trips** screen.

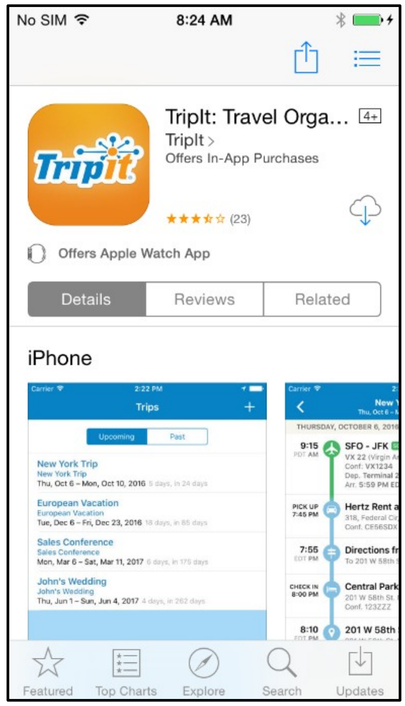
The Travel **Agency Info** scree n appears.

### OTHER APPS

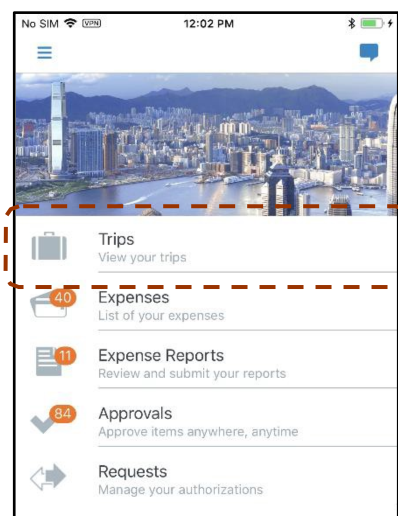
Depending on your company's configuration, TripIt and other apps may be available for download.

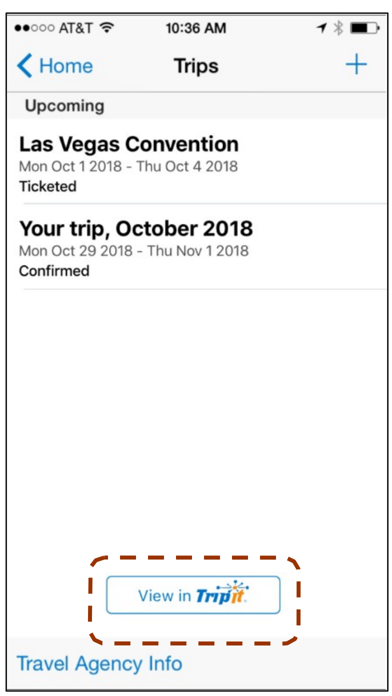
1) On the home screen, tap (upper-left corner).
2) On the **Menu** screen, tap the desired option and download.




### VIEW TRIPIT ITINERARY

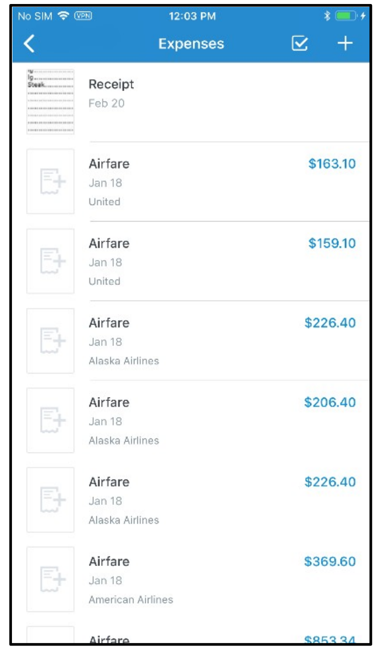



1) On the home screen, tap **Trips**.
2) On the **Trips** screen, tap **View in TripIt**.

## Expenses and Expense Reports

### *Expense List (Expenses Screen)*



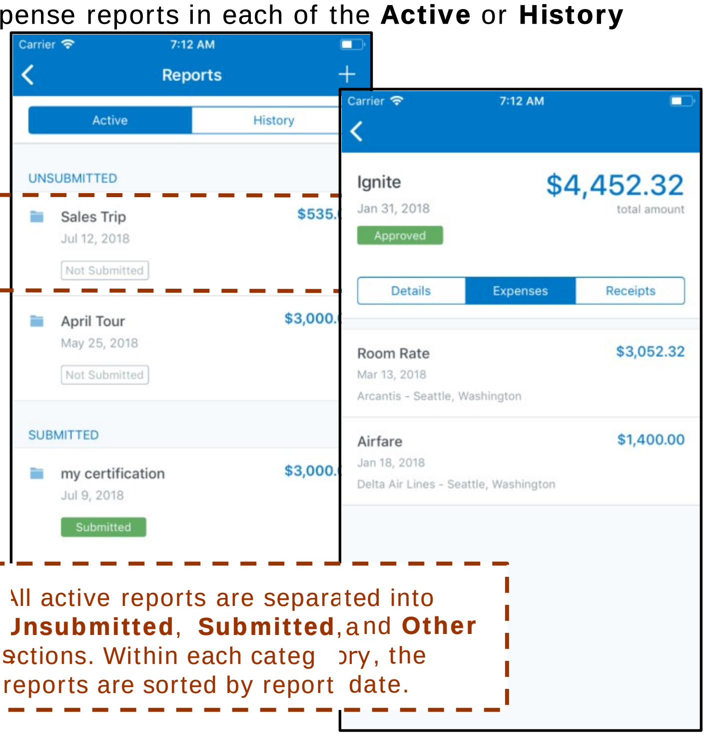

On the home screen, tap **Expenses** to access your list of expenses. Use the **Expenses** screen to:

- 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 Mileage 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



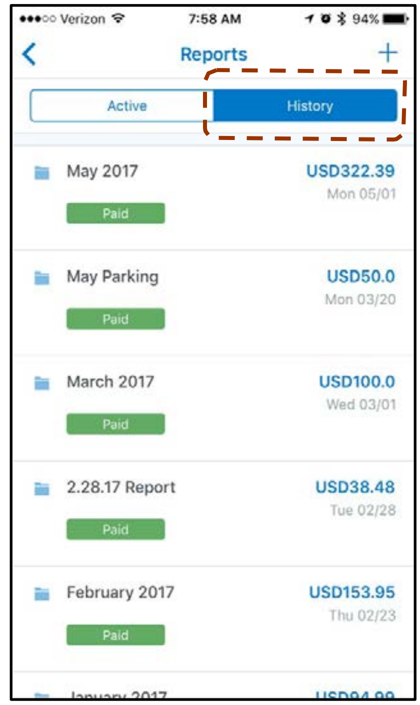

All active reports are separated into **Unsubmitted**, **Submitted**, and **Other** sections. Within each category, the reports are sorted by report date.

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

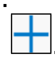
In the **History** section, you can:

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

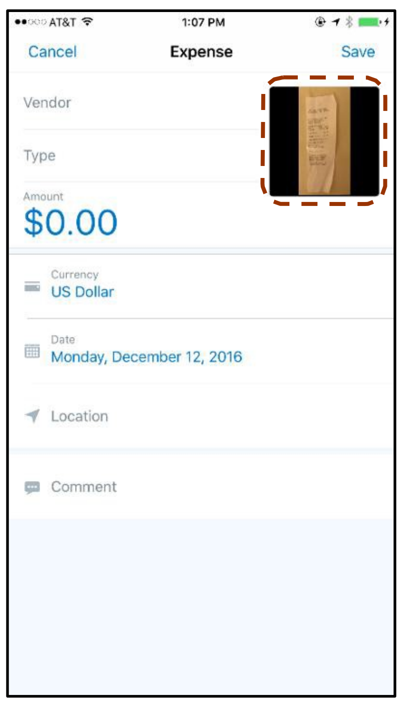


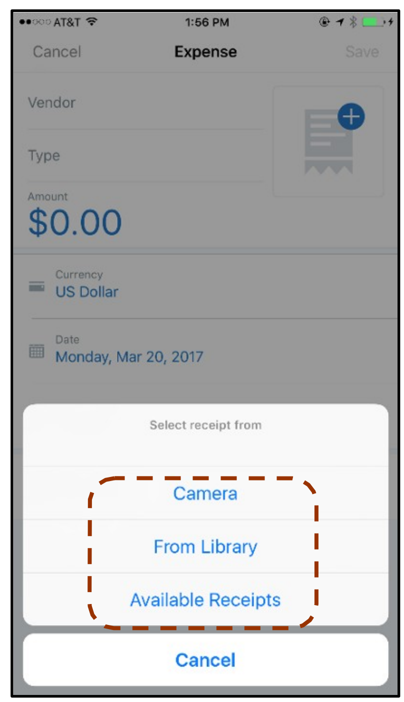

### *Create a Mobile Expense*

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**.



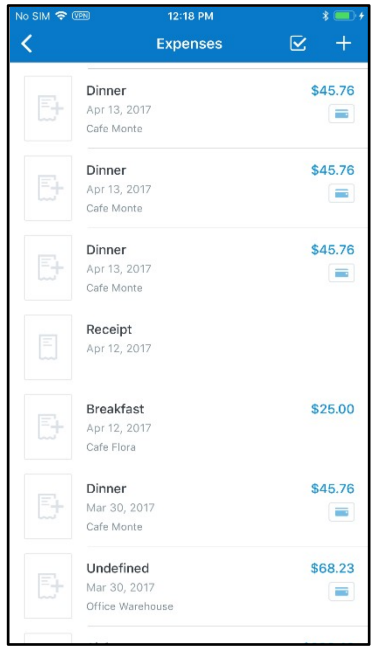



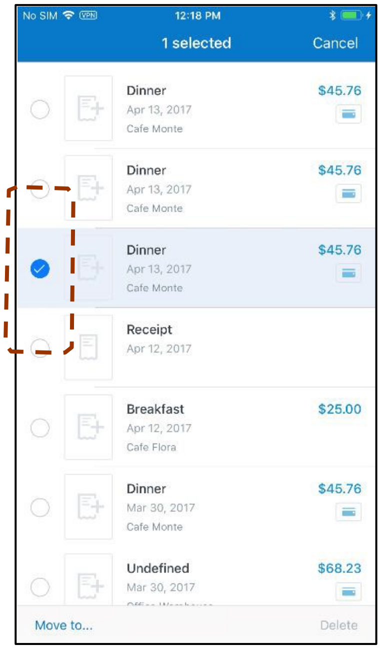
### ***Delete an Expense From the Expenses Screen***

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

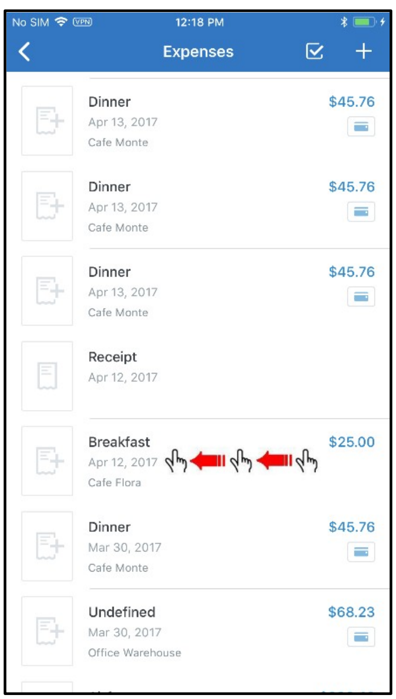
**NOTE:** To delete a *card* transaction, use the web version of Expense - if your company allows you to delete card transactions.

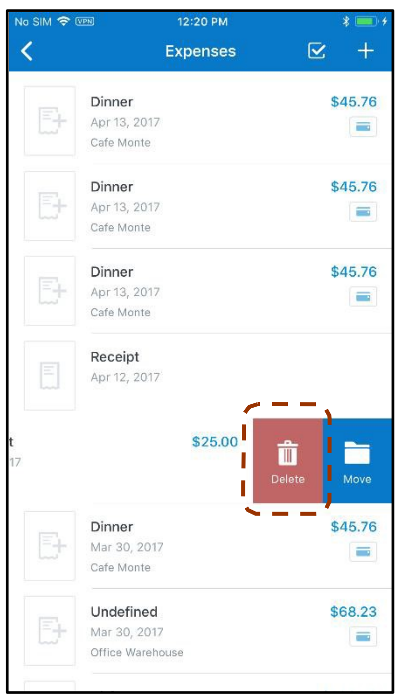
1) On the **Expenses** screen, tap (upper-right corner). The selection circles appear.
2) Tap one or more selection circles.
3) Tap **Delete** (lower-right corner).




### **Delete a Single Mobile Expense**



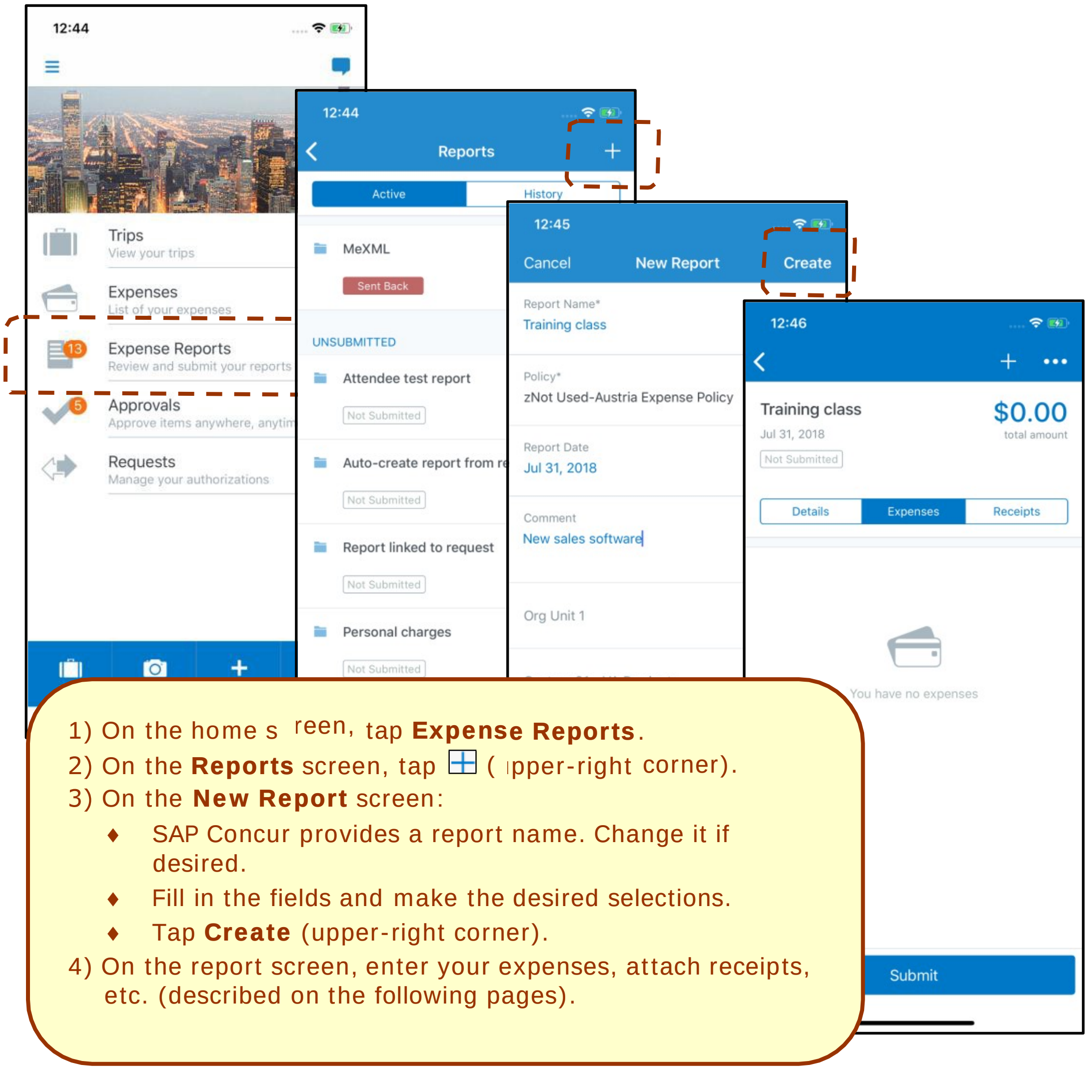




1) On the **Expenses** screen, swipe the desired expense to the left.
2) Tap **Delete**.

### *Create a New Expense Report*

You can create a new report:

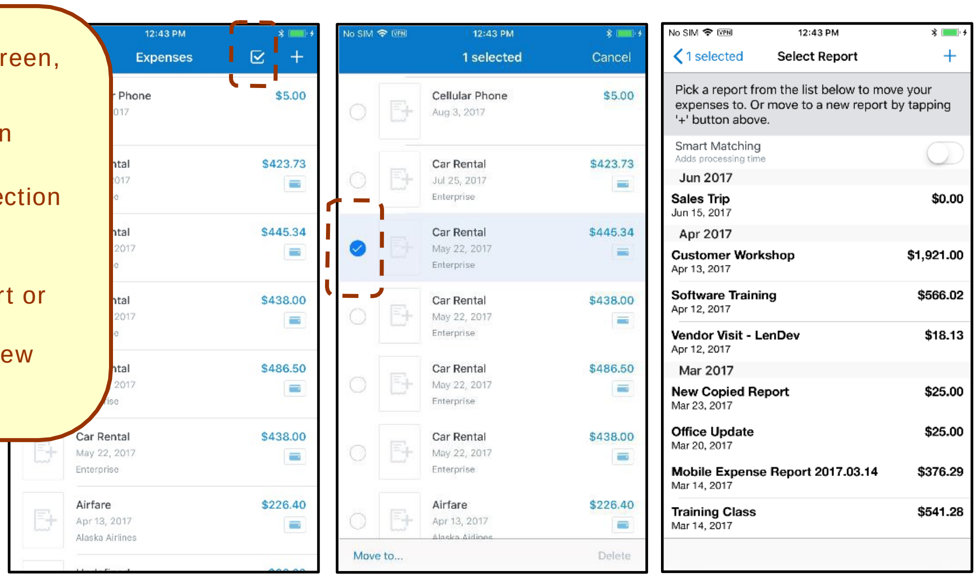
- From the **Reports** screen (shown here)
- While adding expenses from the **Expenses** screen (described on the following pages)
- While creating a car mileage expense (described on the following pages)



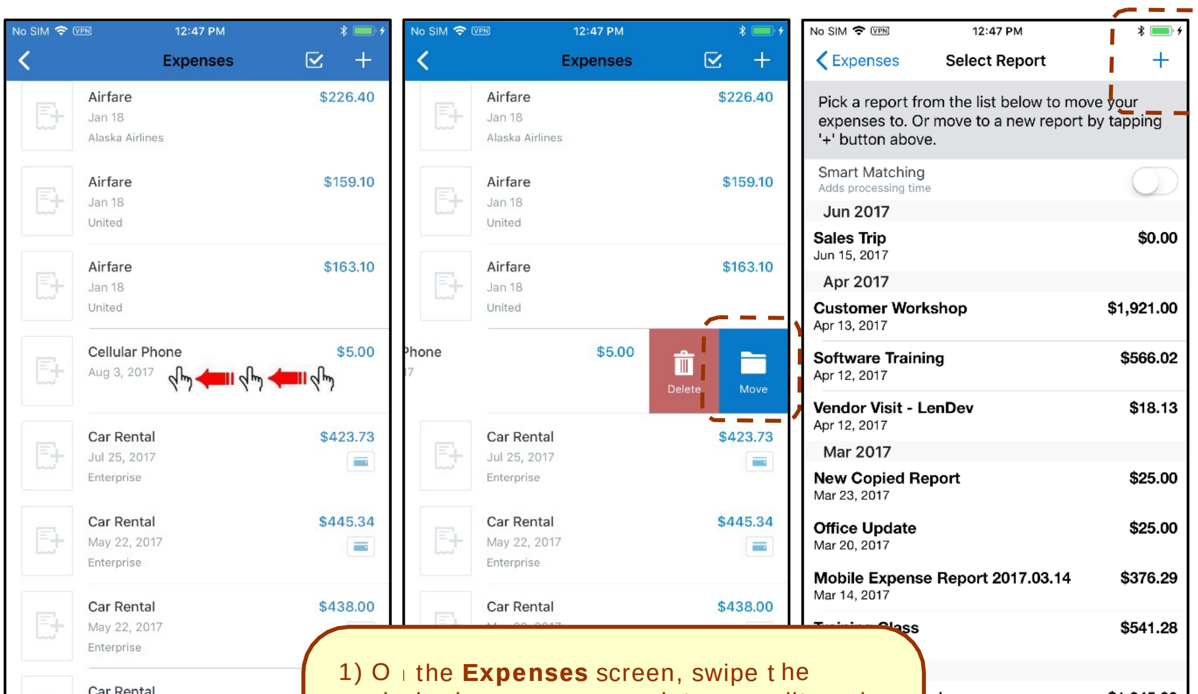
### *Move Expenses From the Expenses Screen to an Expense Report*

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 ☑ (upper-right corner). The selection circles appear.
2) Tap one or more selection circles.
3) Tap **Move to...**
4) Tap an existing report or tap ⊞ (upper-right corner) to create a new one.

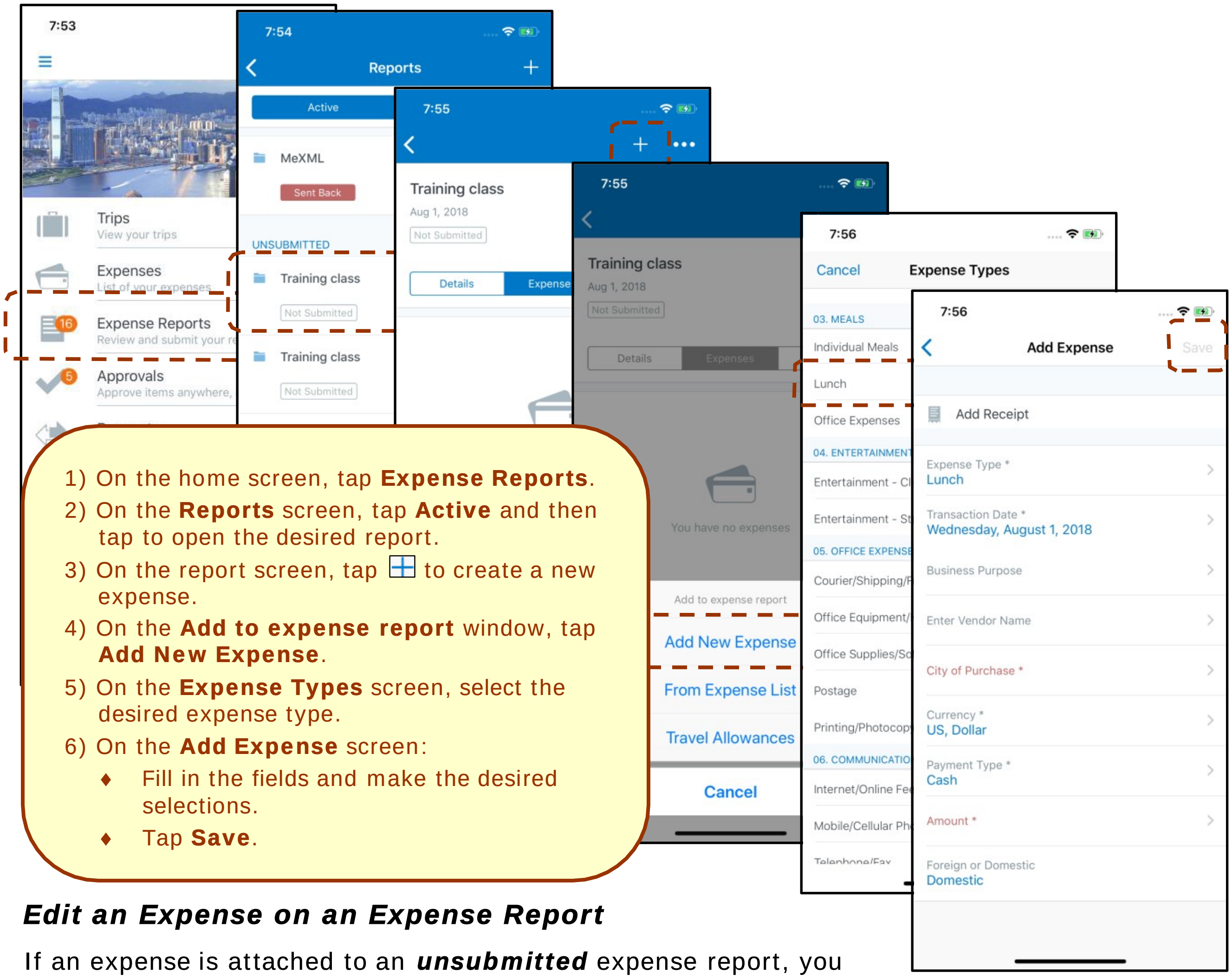



### Move a Single Mobile Expense, E-Receipt, or Credit Card Charge to a New or Existing Report




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 ⊞ (upper-right corner) to create a new report.

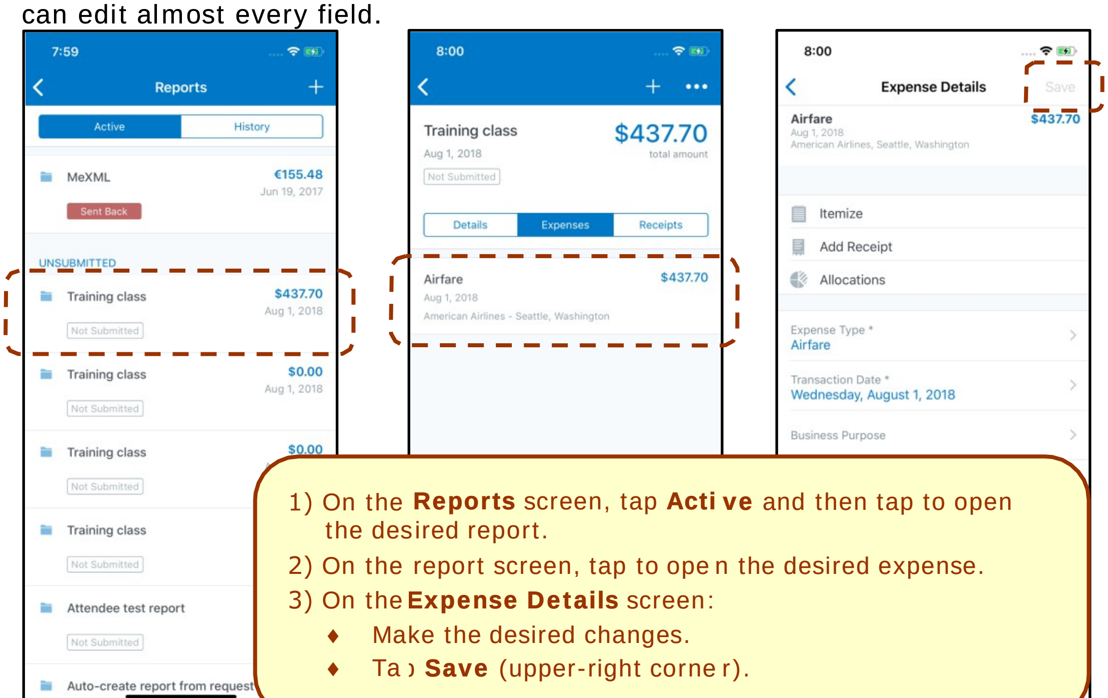
## Create an Expense With an Open Expense Report




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 ⊞ to create a new expense.
4) On the **Add to expense report** window, tap **Add New Expense**.
5) On the **Expense Types** screen, select the desired expense type.
6) On the **Add Expense** screen:
   - Fill in the fields and make the desired selections.
   - Tap **Save**.

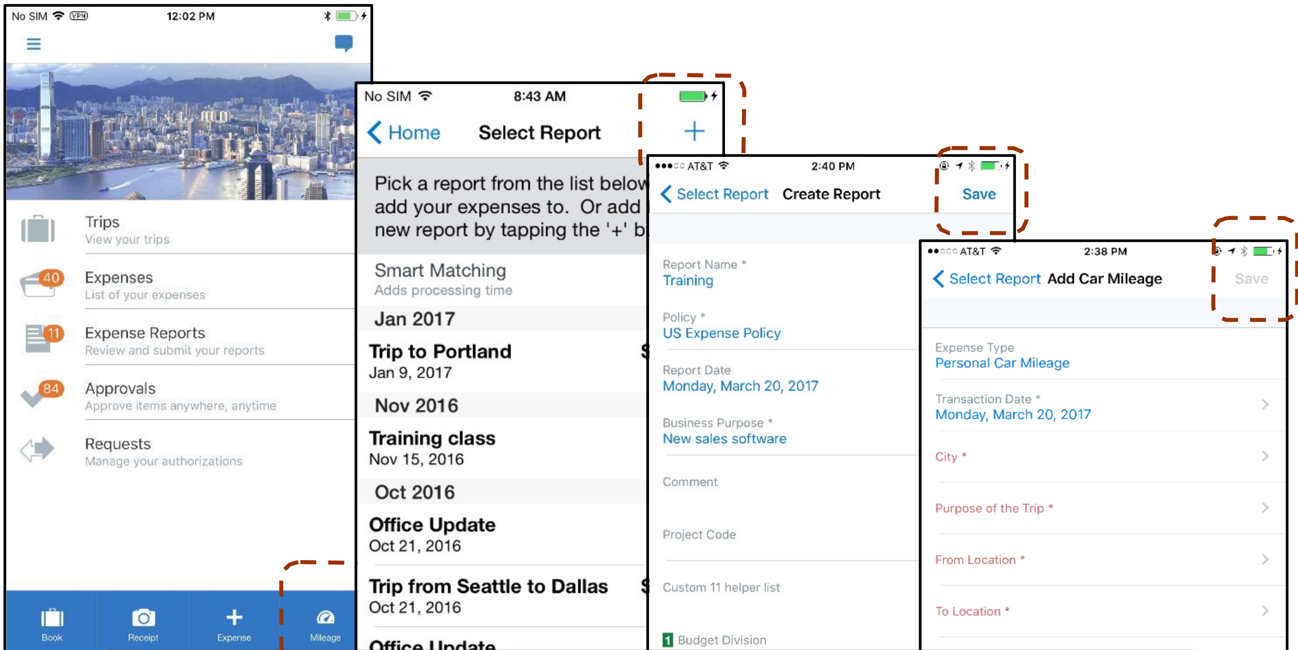
## Edit an Expense on an Expense Report

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.

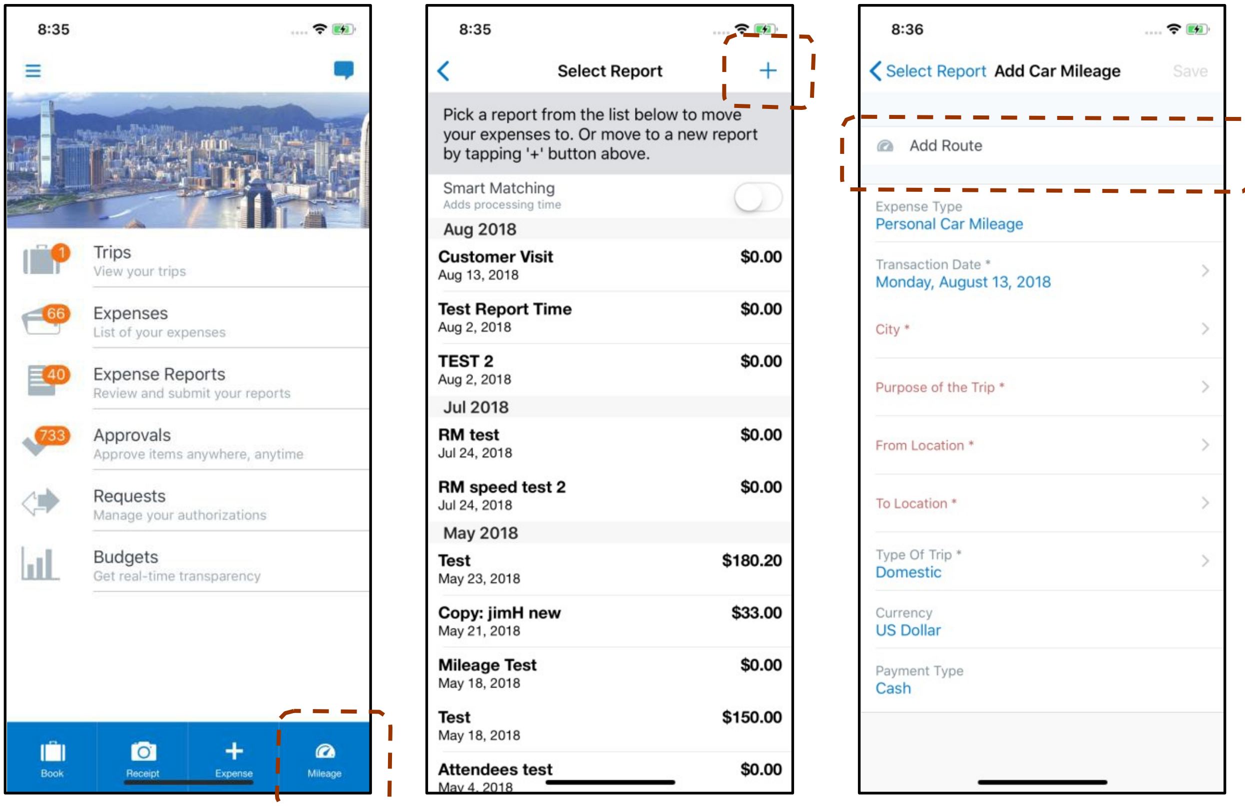
2) On the **Select Report** screen, either tap the desired expense report or tap ⊞ (upper-right corner) to create a new report.

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

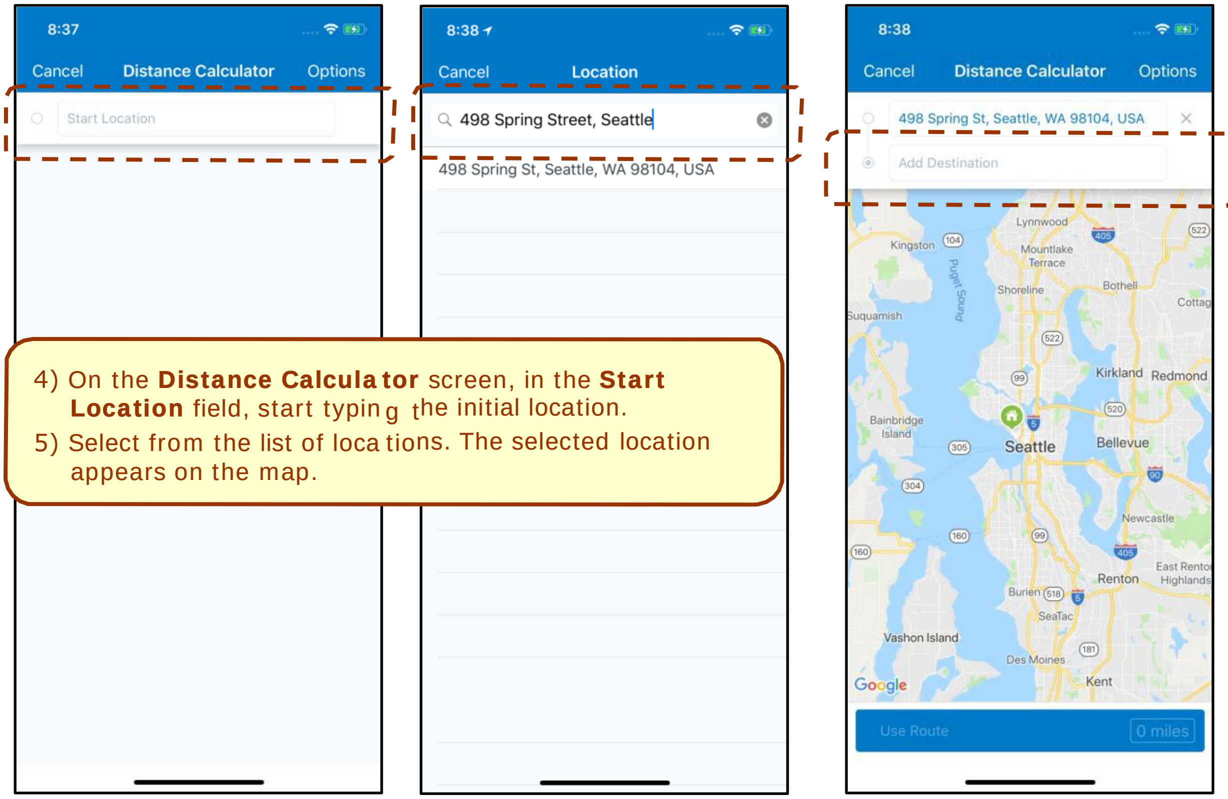
4) On the **Add Car Mileage** screen:
   - Fill in the fields and make the desired selections.
     **NOTE:** SAP Concur calculates the amount based on the distance and the company's mileage rate.
   - Tap **Save** (upper-right corner).

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

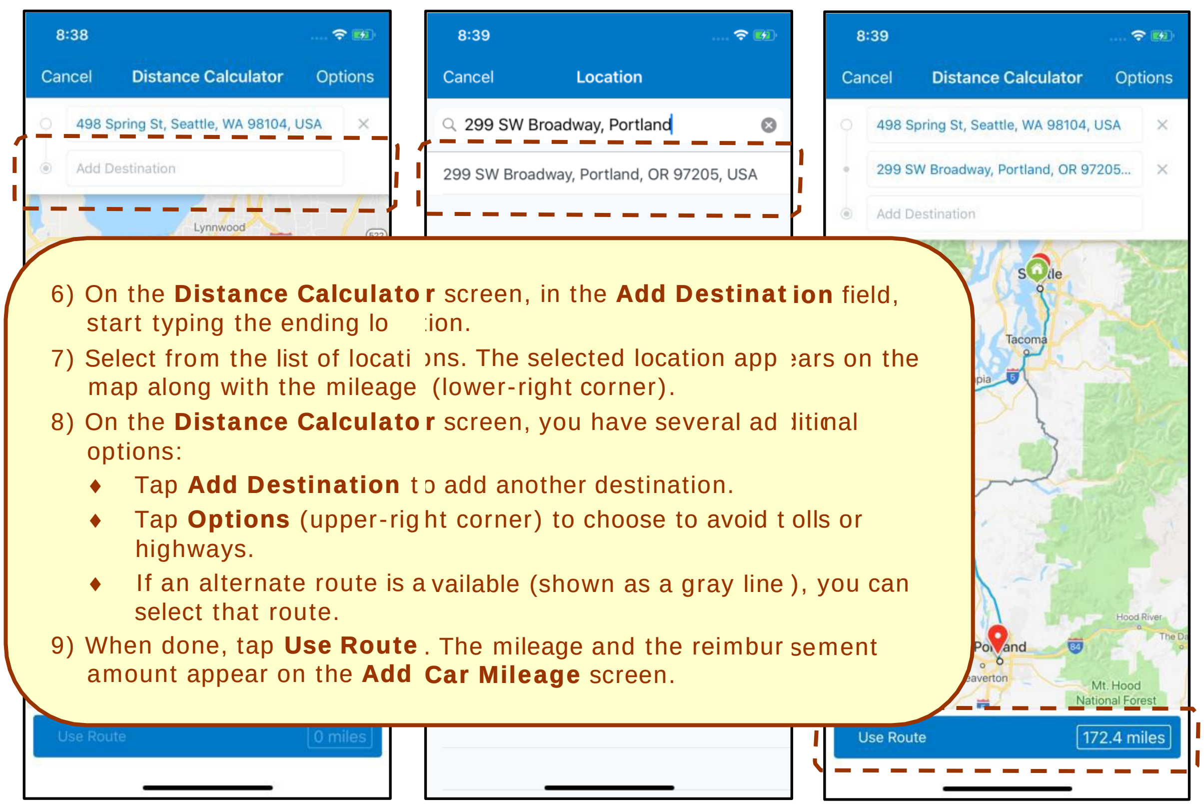
The Mileage Calculator can be used for both personal and company car mileage. The example below shows personal mileage, using the **Mileage** icon on the home screen. For company car mileage, the user creates an expense as usual and selects the *Company Car Mileage* (or something similar) expense type.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

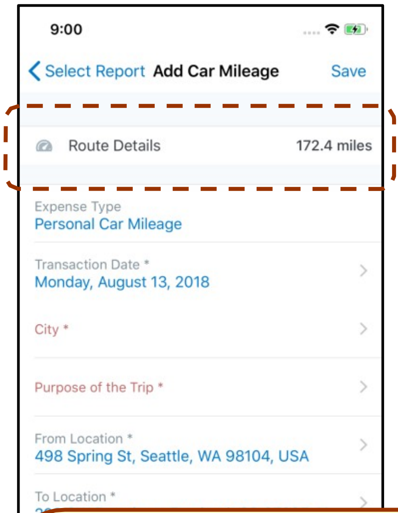


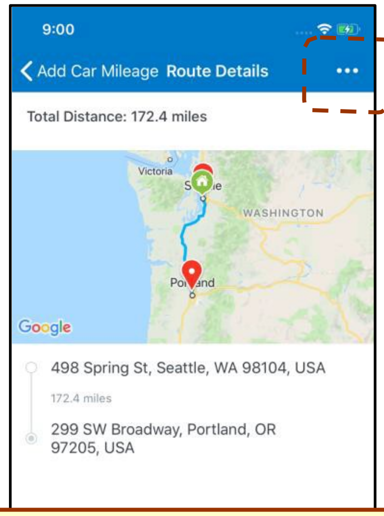

4) On the **Distance Calculator** screen, in the **Start Location** field, start typing the initial location.
5) Select from the list of locations. The selected location appears on the map.

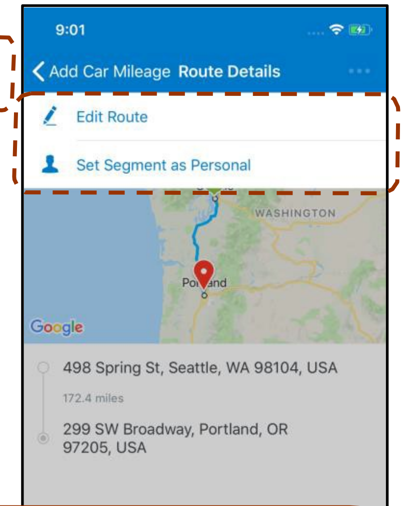



6) On the **Distance Calculator** screen, in the **Add Destination** field, start typing the ending location.
7) Select from the list of locations. The selected location appears on the map along with the mileage (lower-right corner).
8) On the **Distance Calculator** screen, you have several additional 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.

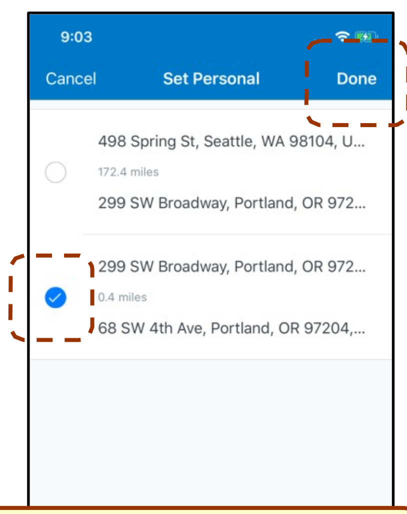
## Make Adjustments

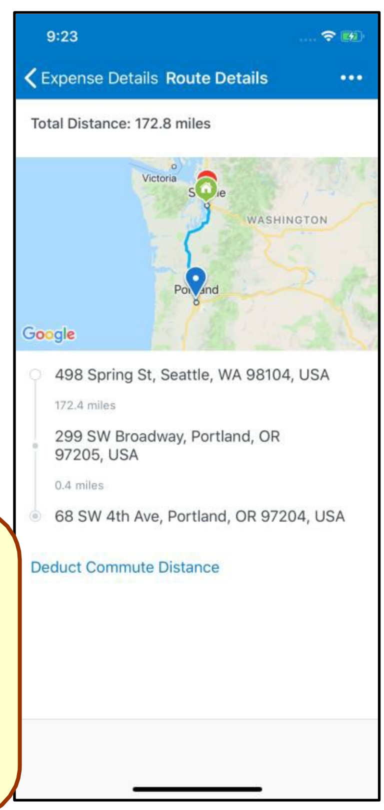


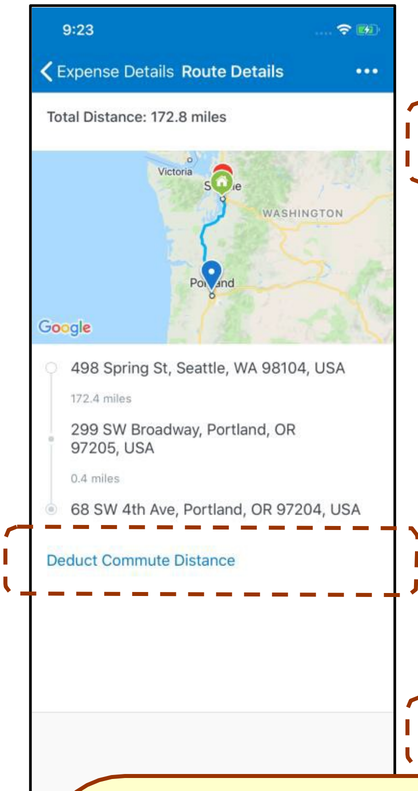



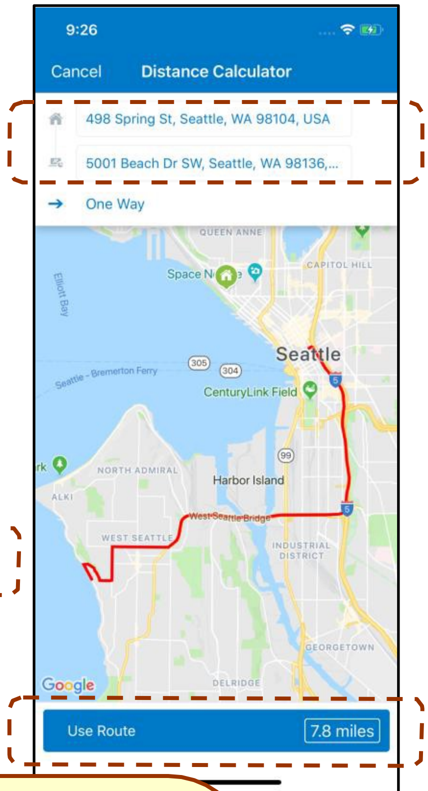

1) To make additional adjustments, on the **Add Car Mileage** screen, tap **Route Details**.
2) On the **Route Details** screen, click ••• (upper-right corner) to access the menu. Using the menu, you can:
   - Edit any portion of the trip
     *– or –*
   - Designate part of the trip as personal
3) To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

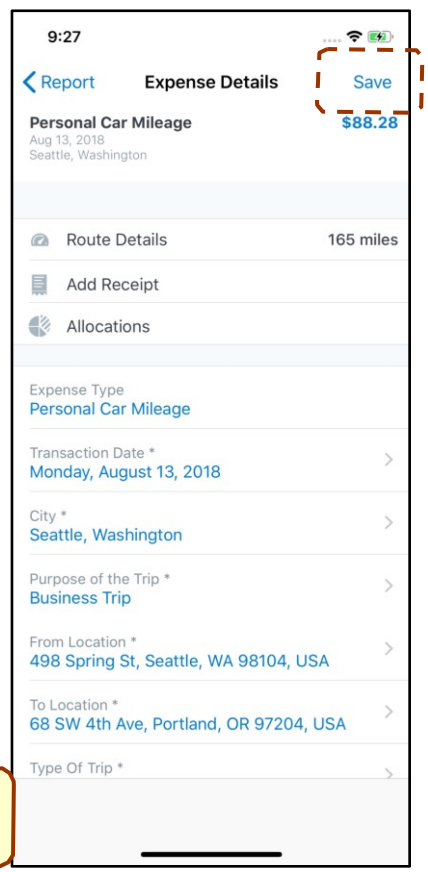



5) To deduct commute mileage:

- 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.

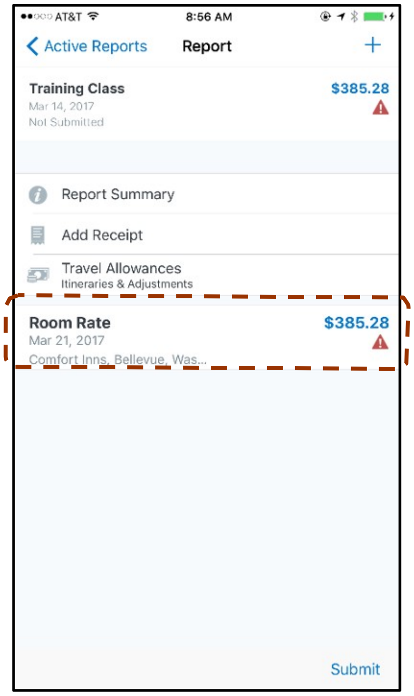


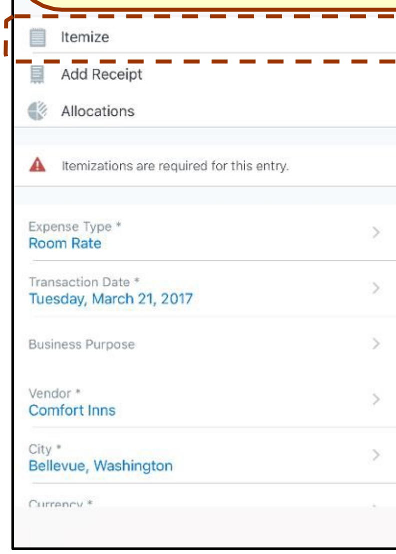

7) Tap **Save**. The expense is saved to the expense report.

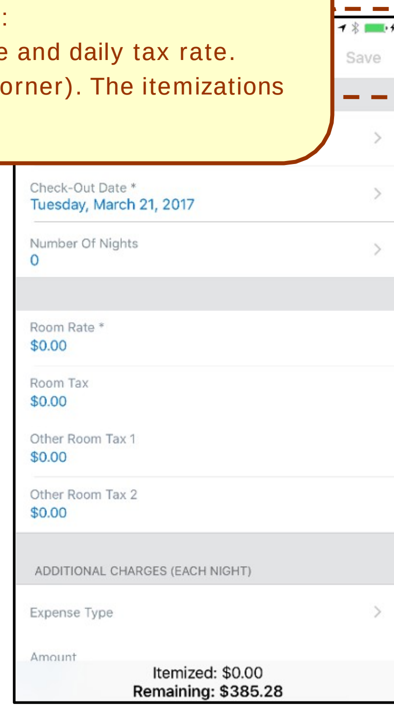
### ***Add/Edit/Delete an Itemization***

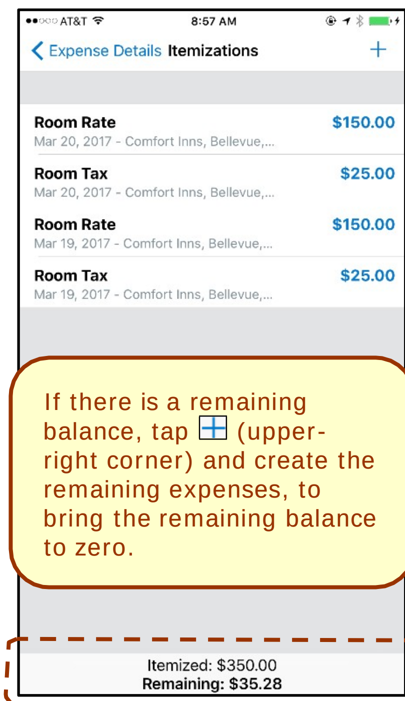
After an expense has been added to a report, you can itemize the expense.

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.

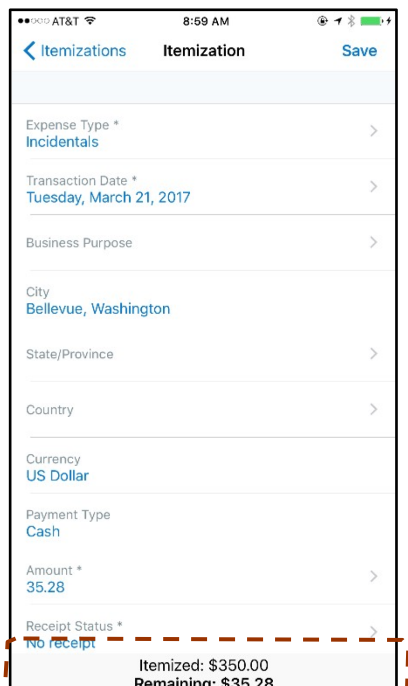


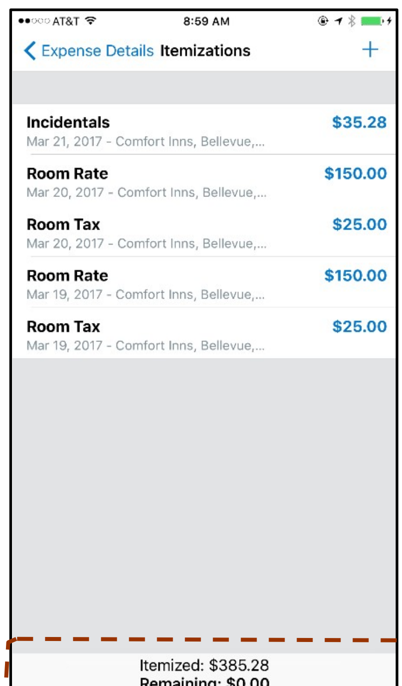




If there is a remaining balance, tap ⊞ (upper-right corner) and create the remaining expenses, to bring the remaining balance to zero.



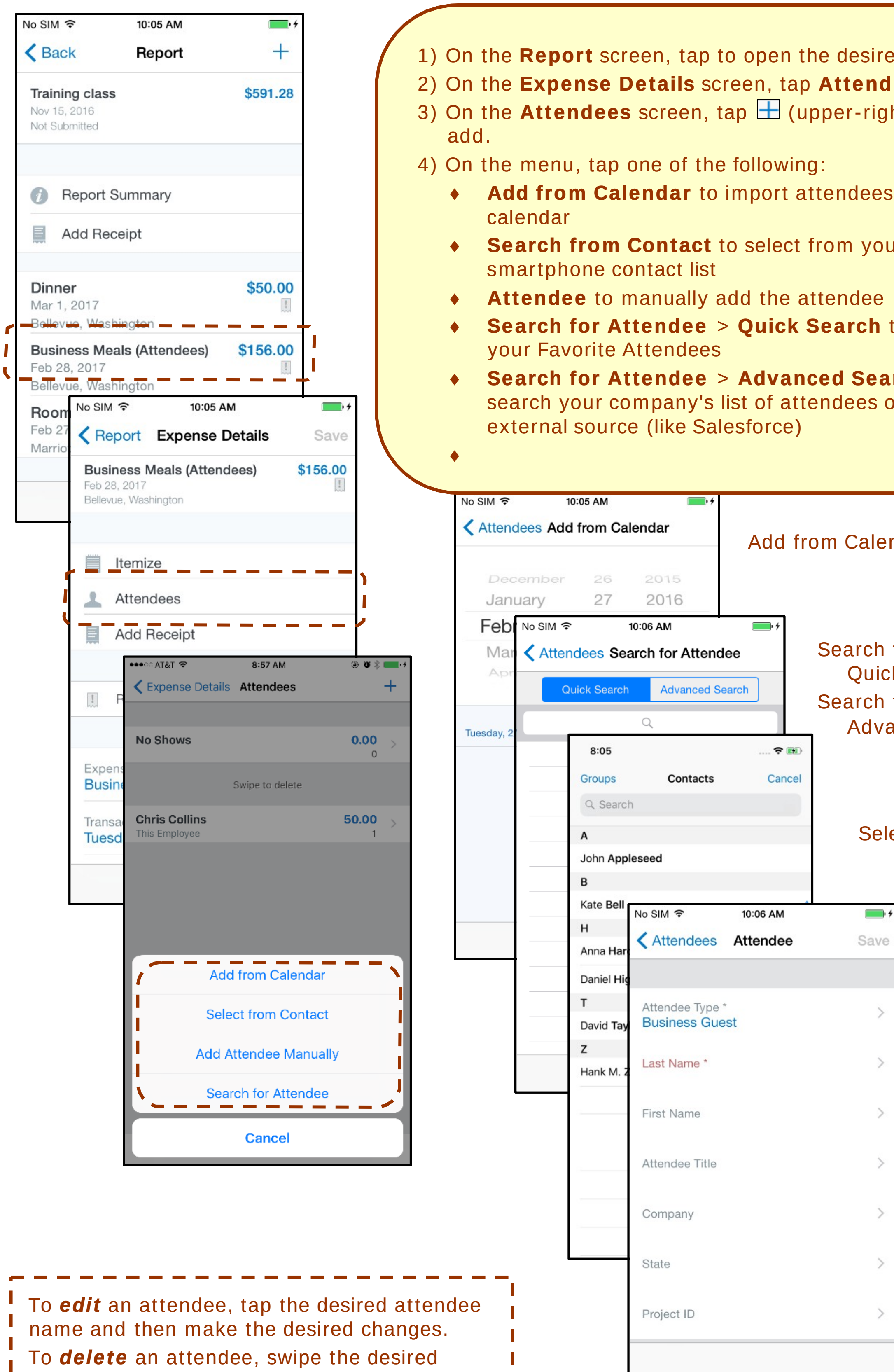




To ***edit*** an itemization, tap the desired itemization and then make the desired changes.
To ***delete*** an itemization, swipe the desired itemization to the left and then tap **Delete**.

### ***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
   - **Attendee** 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)




Add from Calendar

Search for Attendee > Quick Search

Search for Attendee > Advanced Search

Select from Contact

Attendee

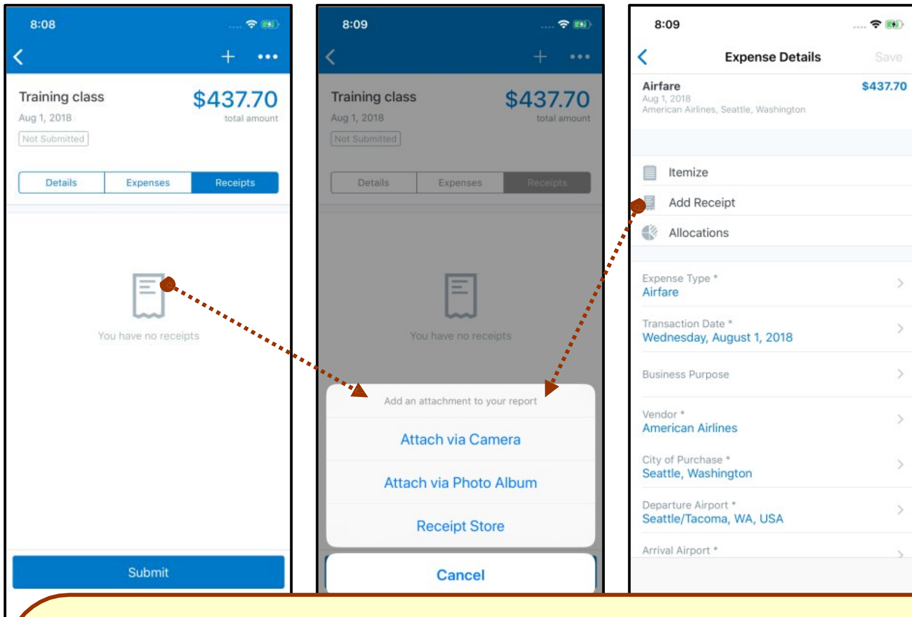
To ***edit*** an attendee, tap the desired attendee name and then make the desired changes.

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.

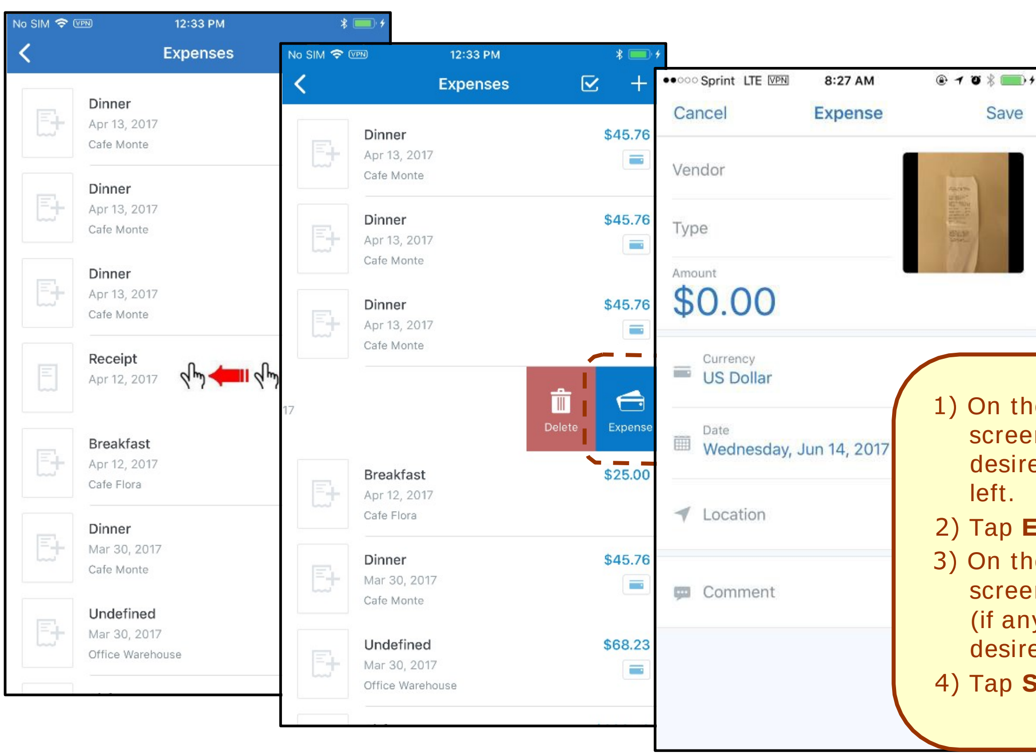



1) On the report screen or the **Expense Details** screen, tap or **Add Receipt**.
2) On the menu, tap:

- **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

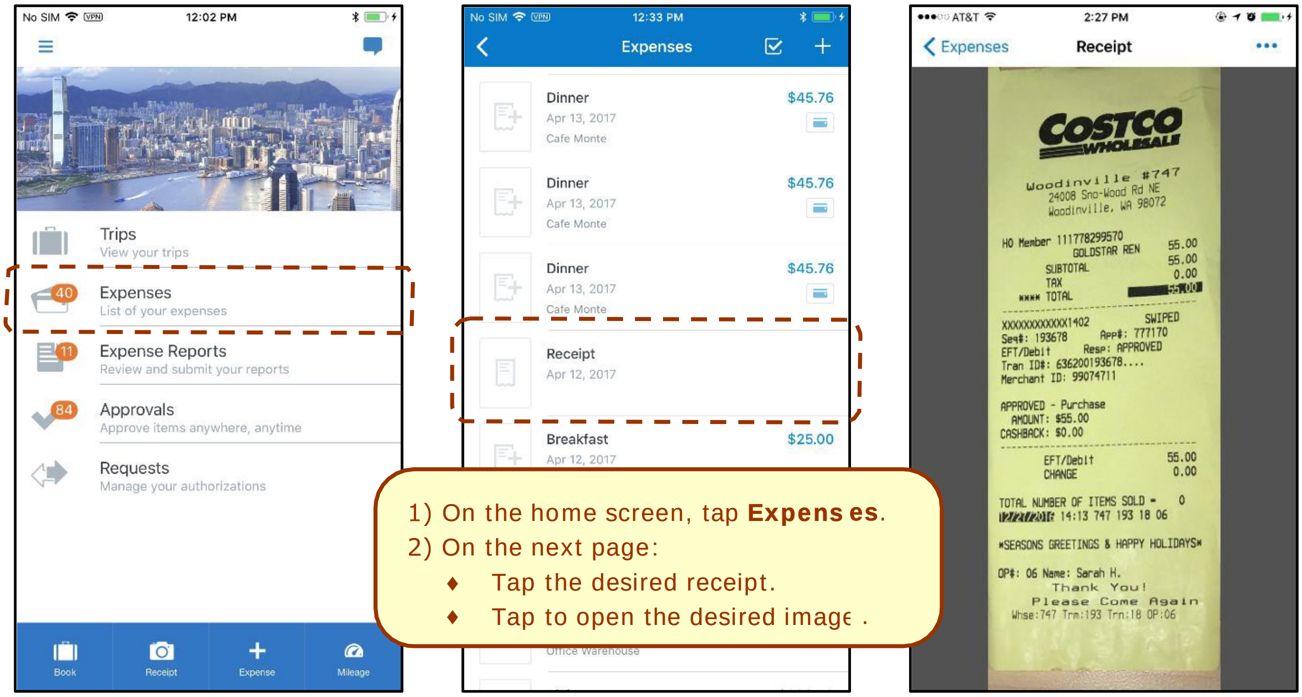
**NOTE**: Turn the device horizontally or upside down to correctly adjust the camera screen.

### CREATE A MOBILE EXPENSE FROM A RECEIPT



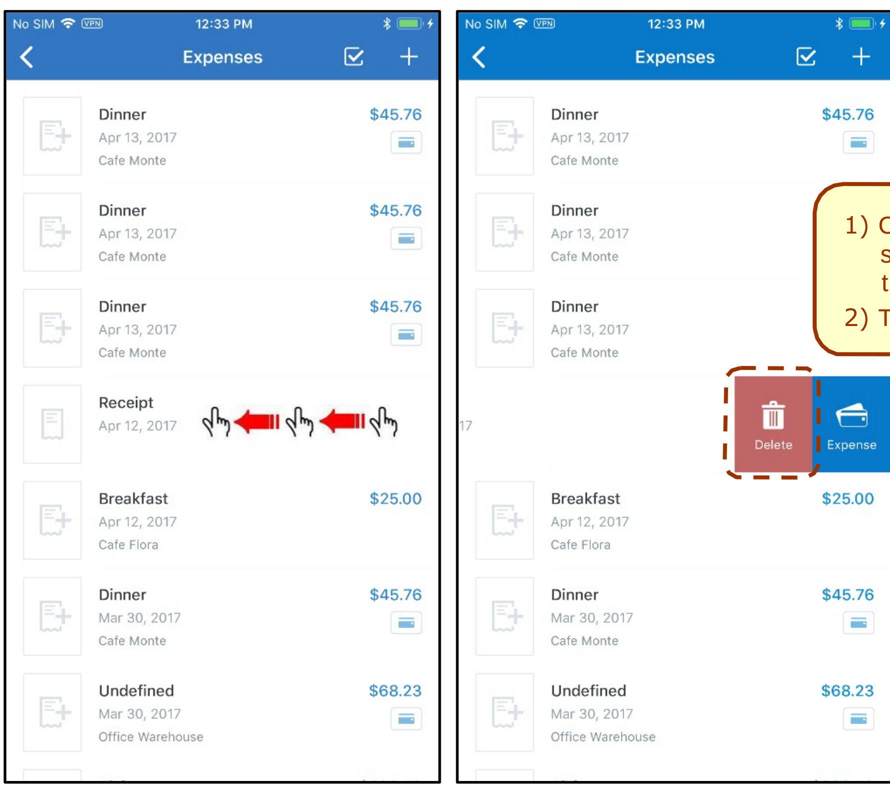

1) On the **Expenses** screen, swipe the desired receipt to the left.
2) Tap **Expense**.
3) On the **Expense** screen, fill in the fields (if any) and make the desired selections.
4) Tap **Save**.

## VIEW RECEIPTS




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

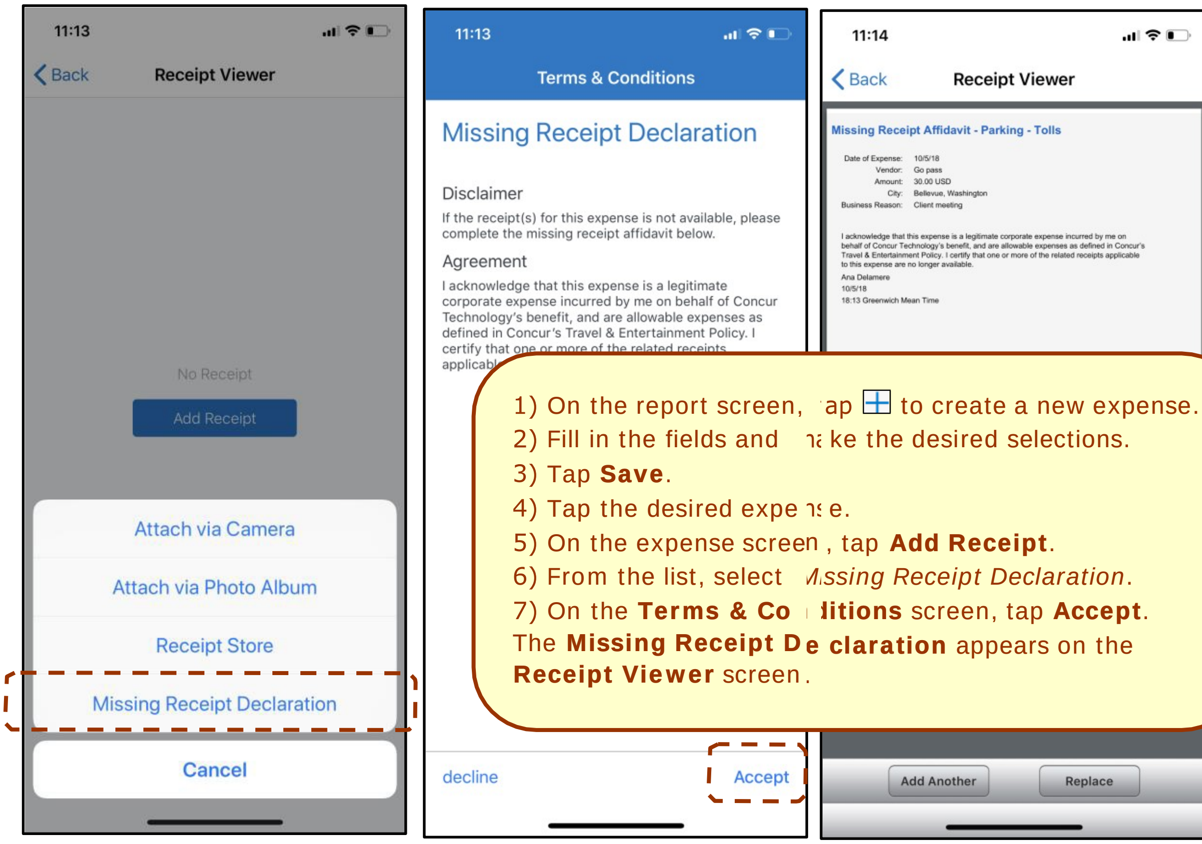
## DELETE RECEIPTS




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

### ATTACH A MISSING RECEIPT DECLARATION TO AN EXPENSE

Attach a missing receipt declaration to an expense.

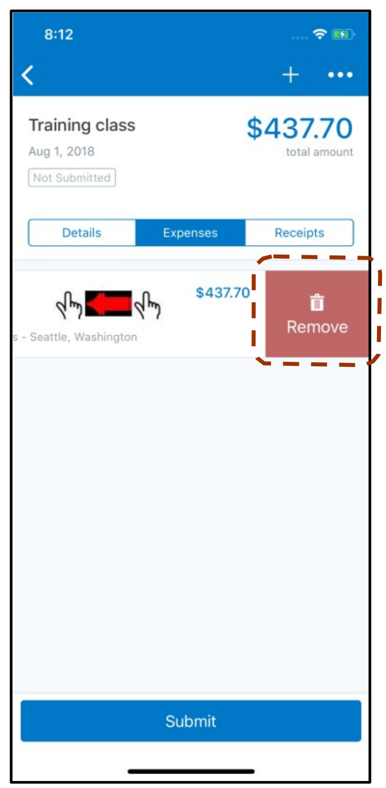



1) On the report screen, tap ⊞ to create a new expense.
2) Fill in the fields and make the desired selections.
3) Tap **Save**.
4) Tap the desired expense.
5) On the expense screen, tap **Add Receipt**.
6) From the list, select *Missing Receipt Declaration*.
7) On the **Terms & Conditions** screen, tap **Accept**.
The **Missing Receipt Declaration** appears on the **Receipt Viewer** screen.

### *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 **Remove** button appears.
2) Tap **Remove**.

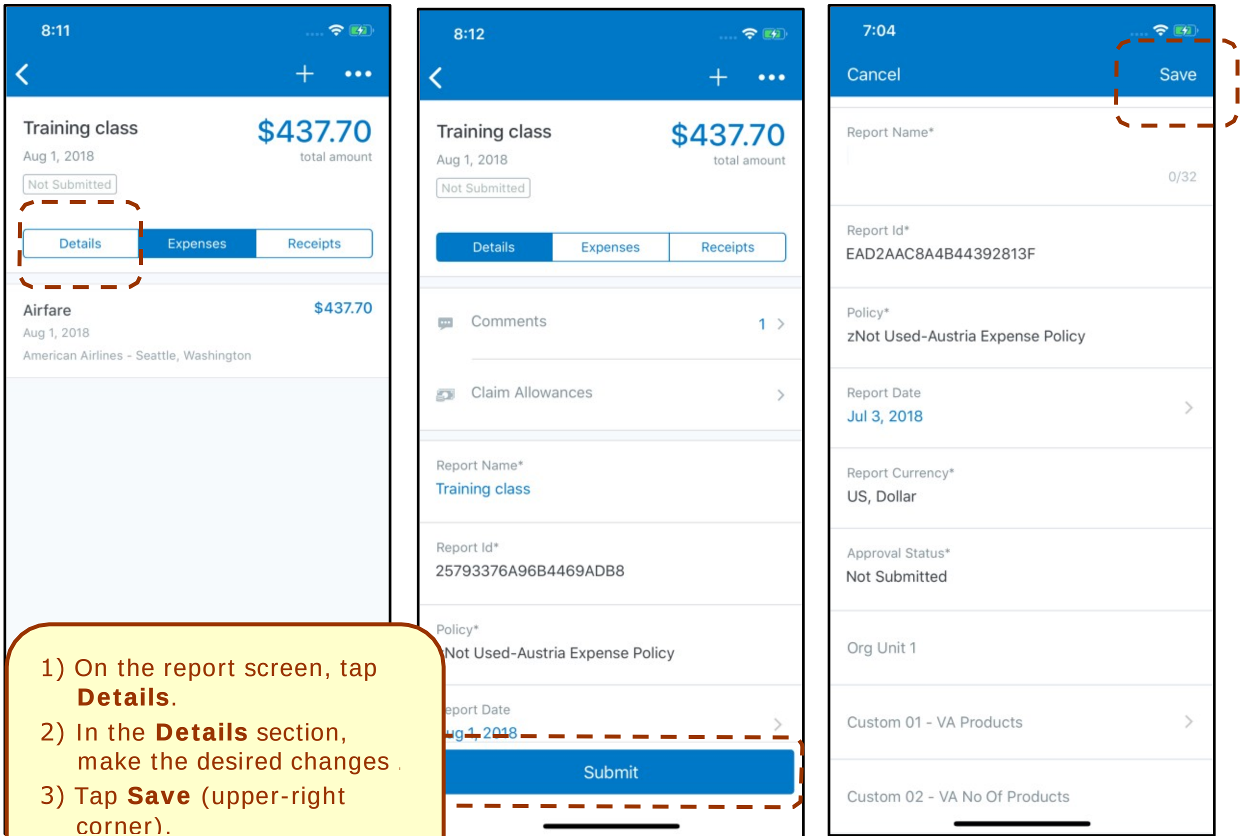



**NOTE:** If you delete a *mobile* expense or an expense created from a card transaction, it is not really deleted; it is moved back to the "pool" of expenses on the **Expenses** screen.

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***

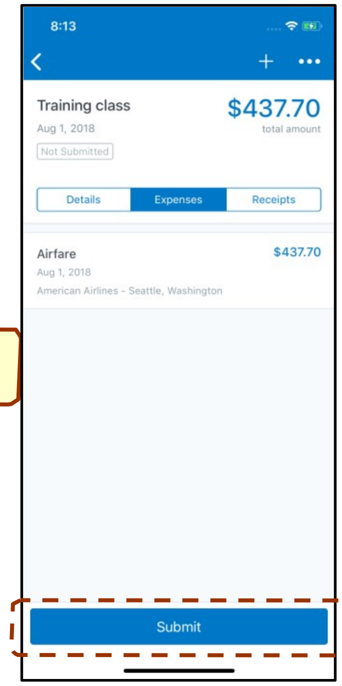
You can edit the report name, date, and other company-defined fields on an ***unsubmitted*** report.




1) On the report screen, tap **Details**.
2) In the **Details** section, make the desired changes.
3) Tap **Save** (upper-right corner).

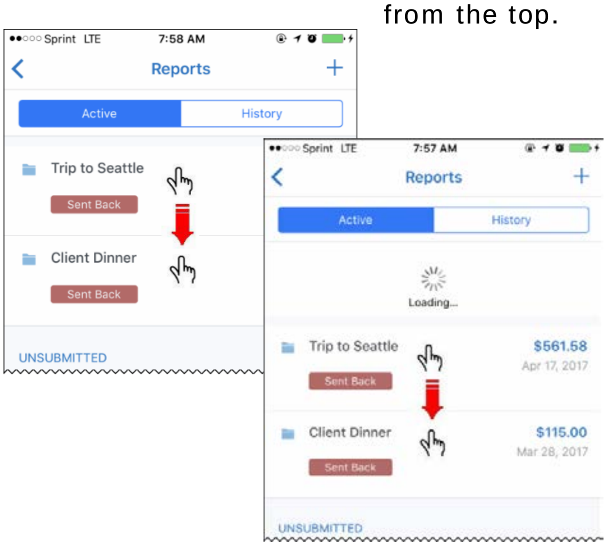
### ***Submit an Expense Report***

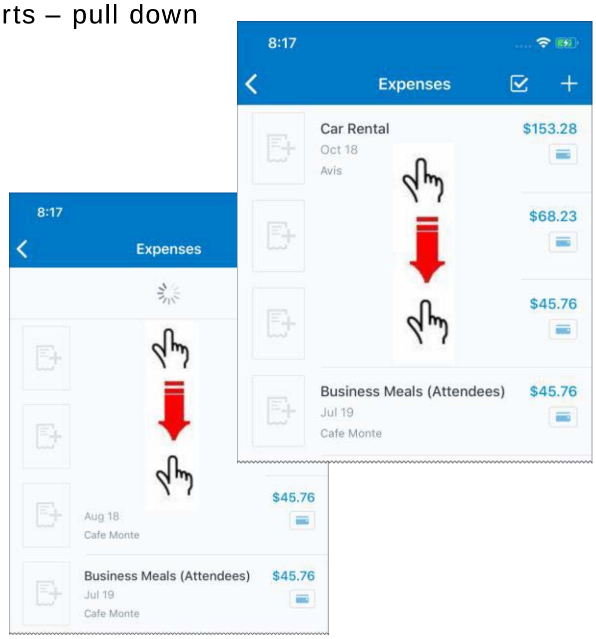
On the report screen, tap **Submit**.




### ***Refresh Data***

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

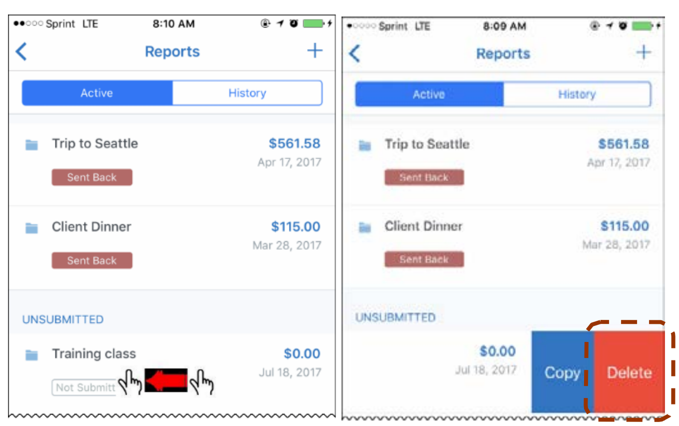



### ***Delete an Unsubmitted Expense Report***

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.



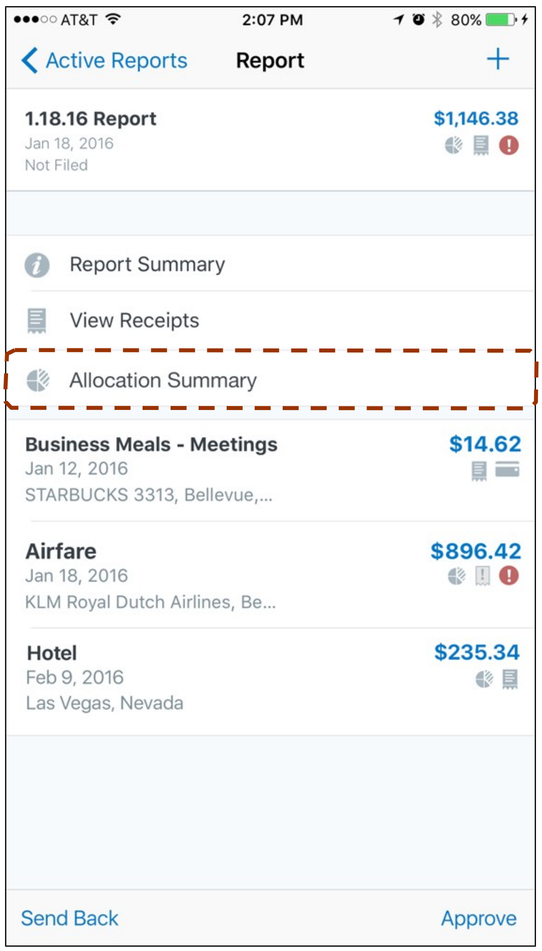
### *View/Add/Edit/Delete Allocations*

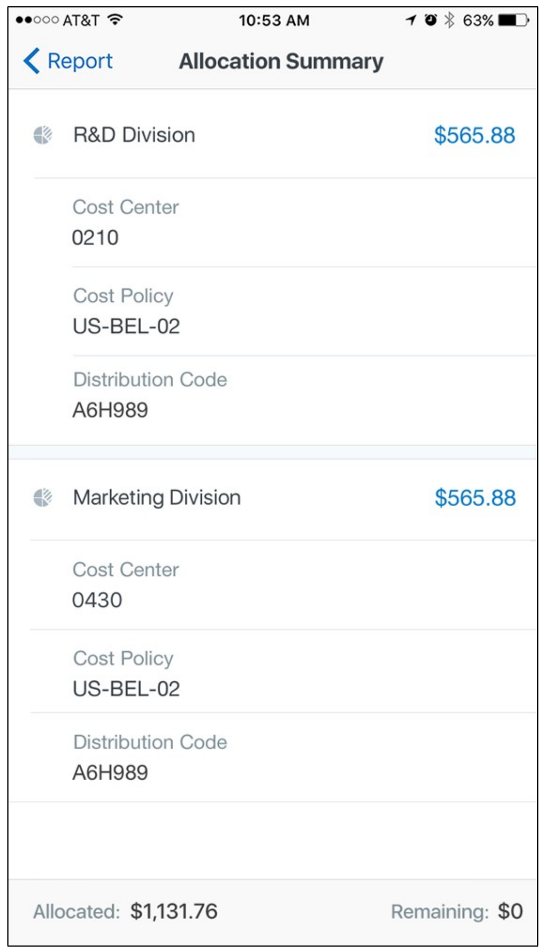
You can view report-level allocations, expense-level allocations, and itemization-level allocations.

#### 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.)

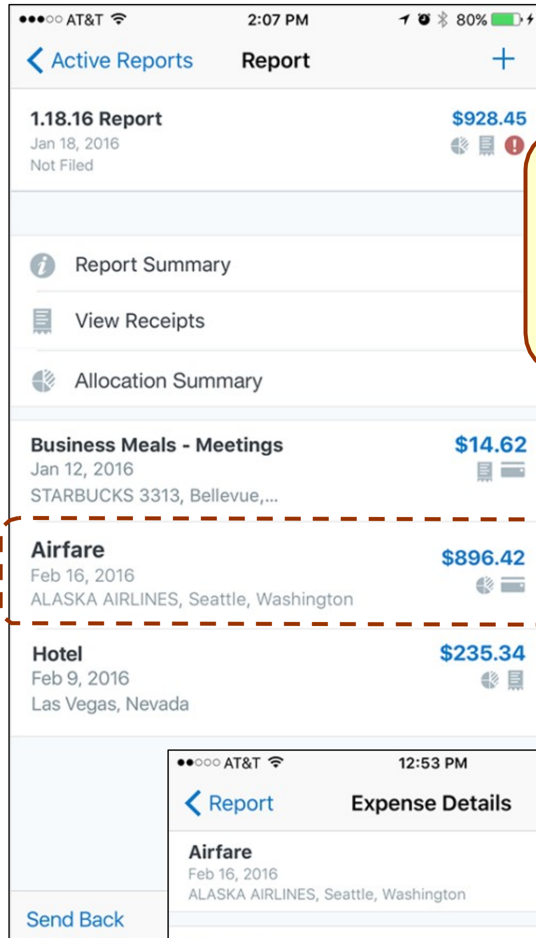
1) On the **Report** screen, tap **Allocation Summary**.
2) On the **Allocation Summary** screen:
   - Review the information.
   - Tap **Report** (upper-left corner) to return to the report.

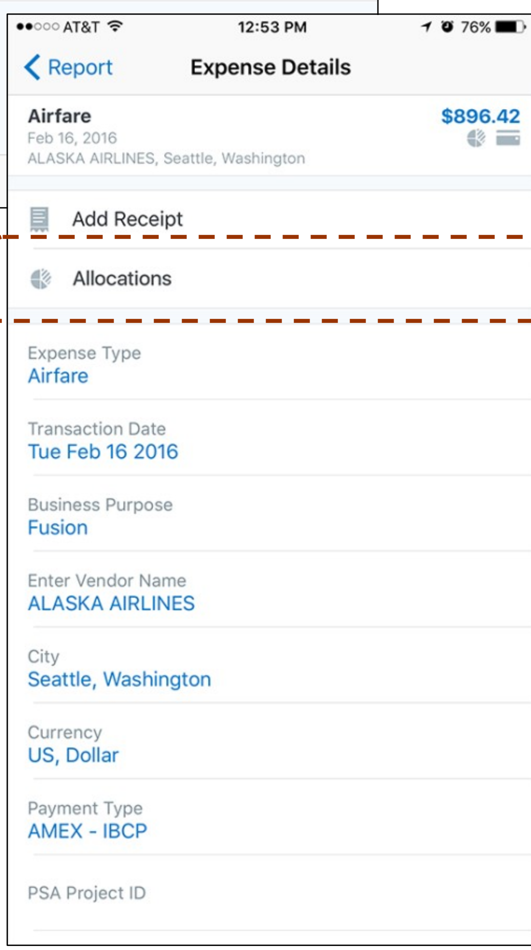


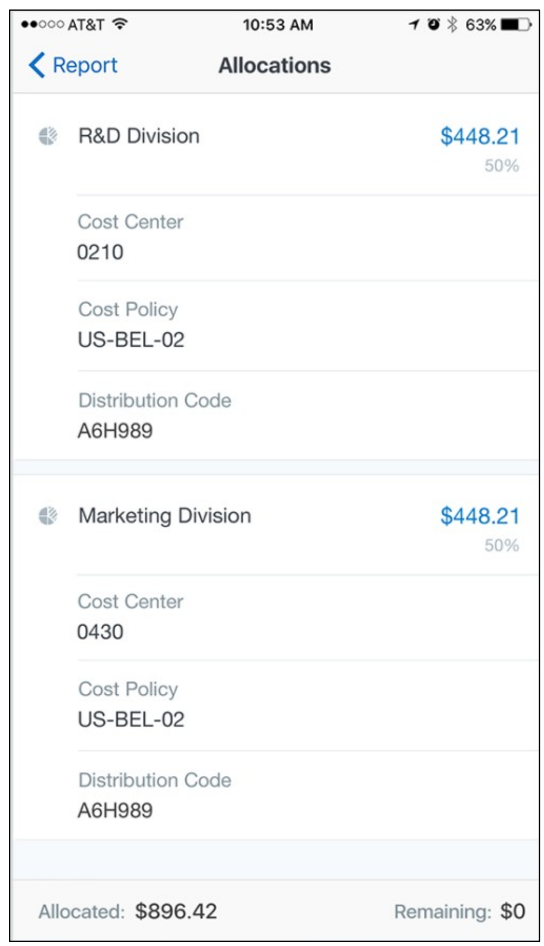



## View Expense-Level Allocations

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.

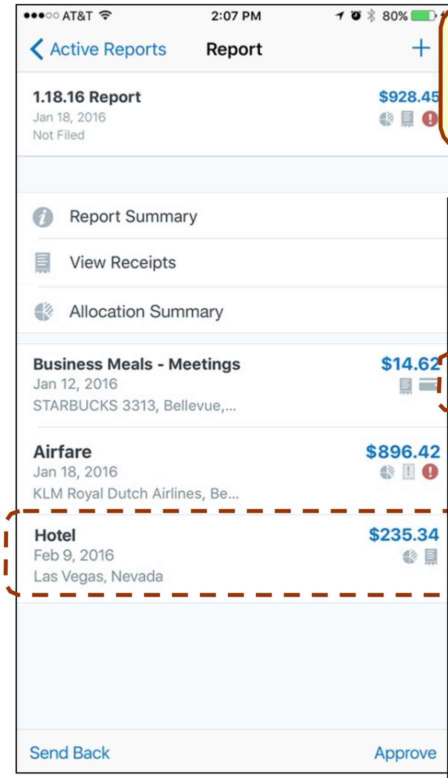


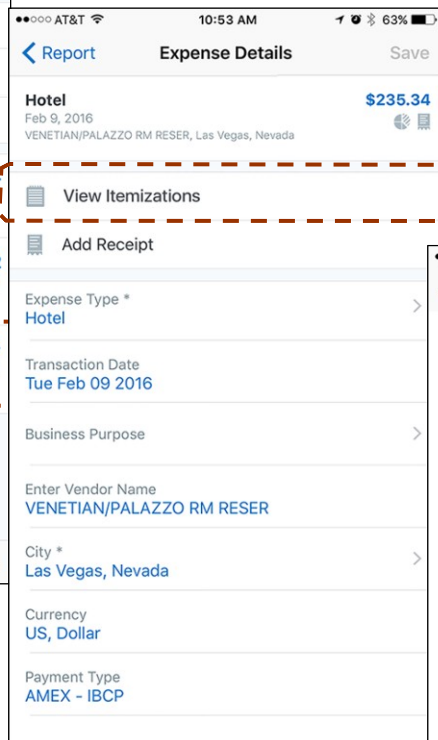



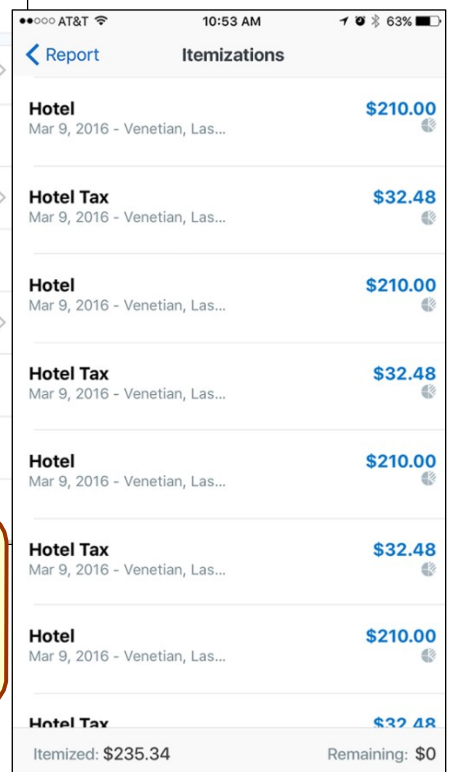



## View Itemization-Level Allocations

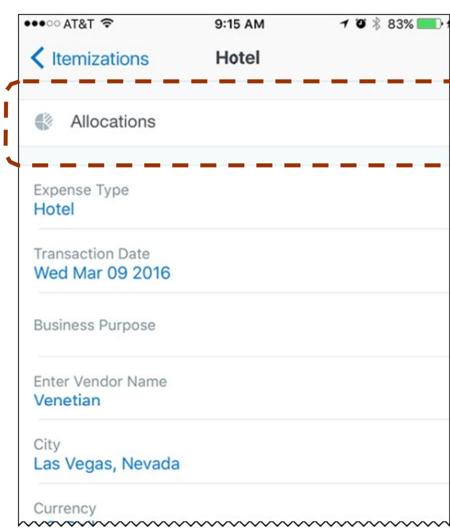
1) On the **Report** screen, tap the desired expense.
2) On the **Expense Details** screen, tap **View Itemizations**.
3) On the **Itemizations** screen, tap the desired itemization.

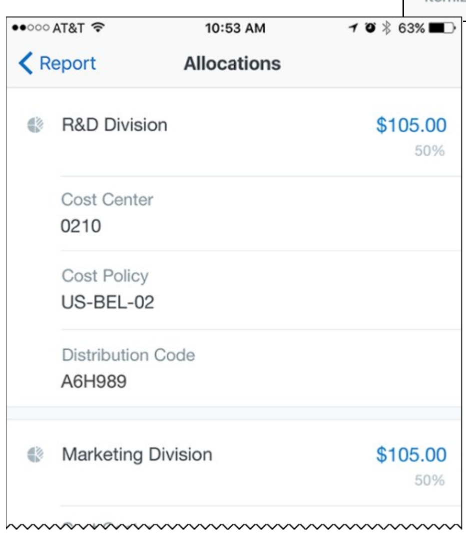


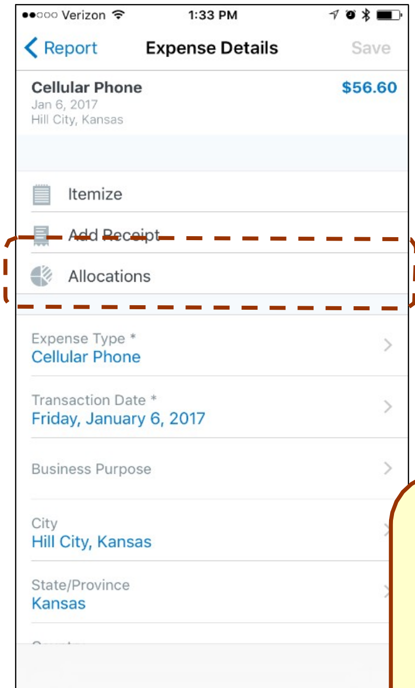



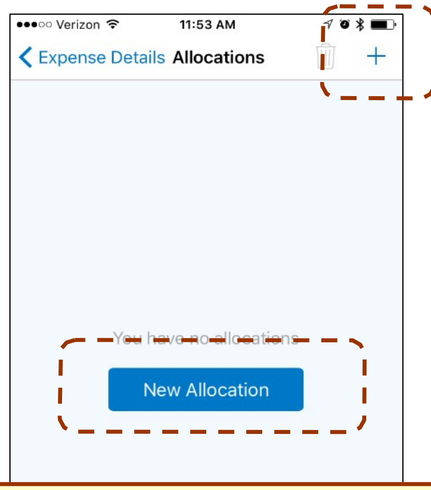

4) On the (in this case) **Hotel** screen, tap **Allocations**.
5) On the **Allocations** screen:
   - ♦ Review the information.
   - ♦ Tap **Report** (upper-left corner) to return to the report.



## Add / Edit / Delete Allocations

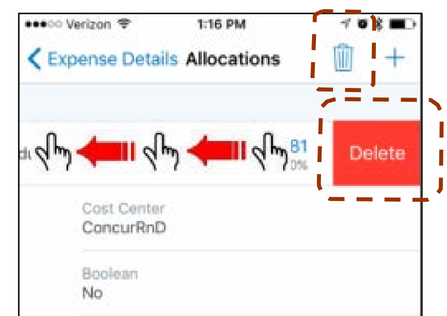



1) To ***add*** allocations, on the **Expe nse Details** screen:

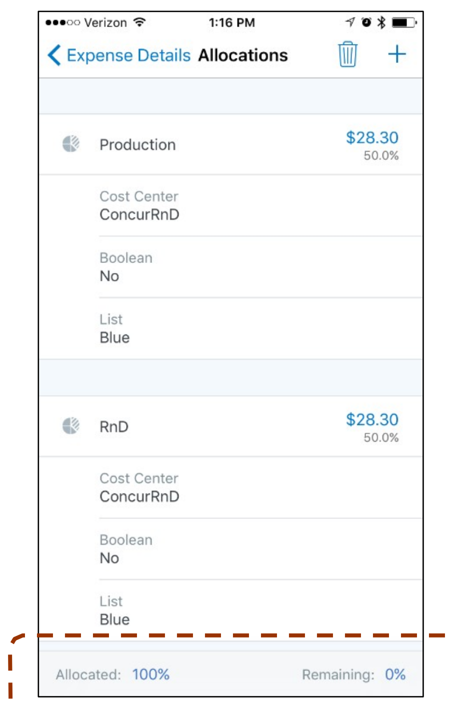
- Tap **Allocations**.
- Tap **New Allocation**.
- Fill in the fields (if any) and make the desired selections.
- Tap ⊞ (upper-right corner) to add additional allocations.

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



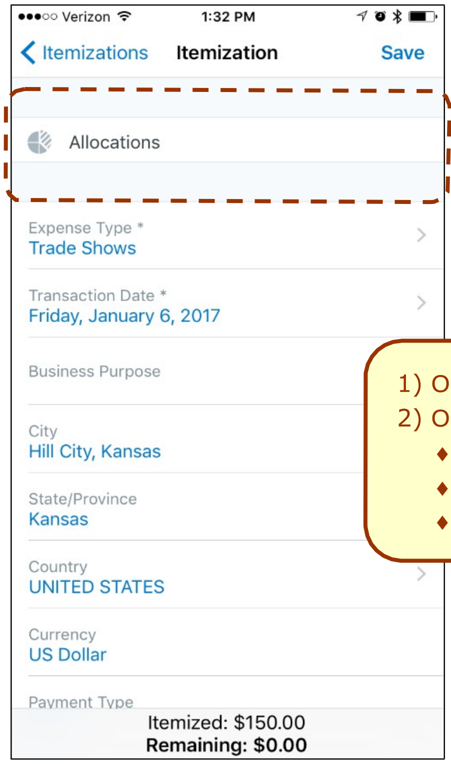

3) To ***delete*** an allocation, on t he **Allocations** screen:

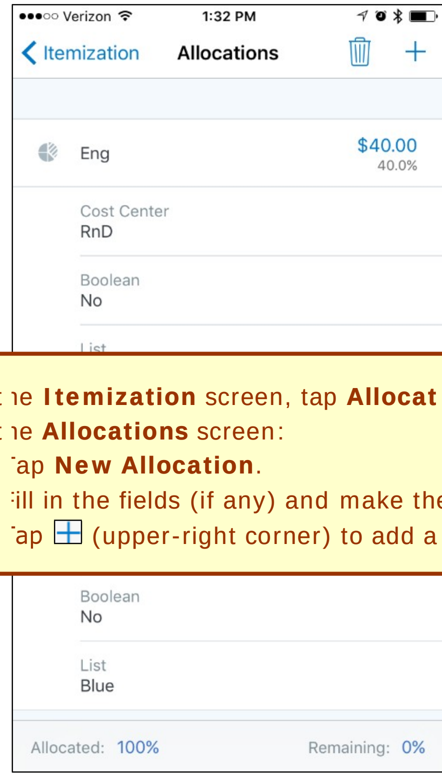
- Swipe left and tap **Delete**.
- Tap 🗑 to delete all allocations for an expense




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

### CREATE ITEMIZATION-LEVEL ALLOCATIONS

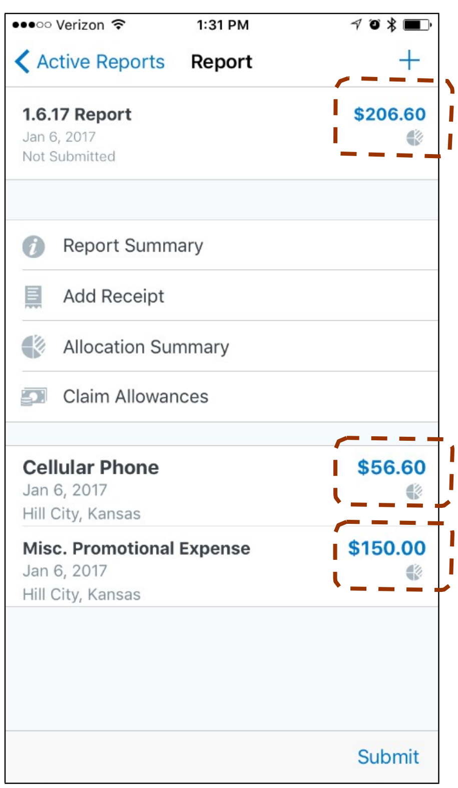



1) On the **Itemization** screen, tap **Allocations**.
2) On the **Allocations** screen:
   - Tap **New Allocation**.
   - Fill in the fields (if any) and make the desired selections.
   - Tap ⊞ (upper-right corner) to add additional allocations.

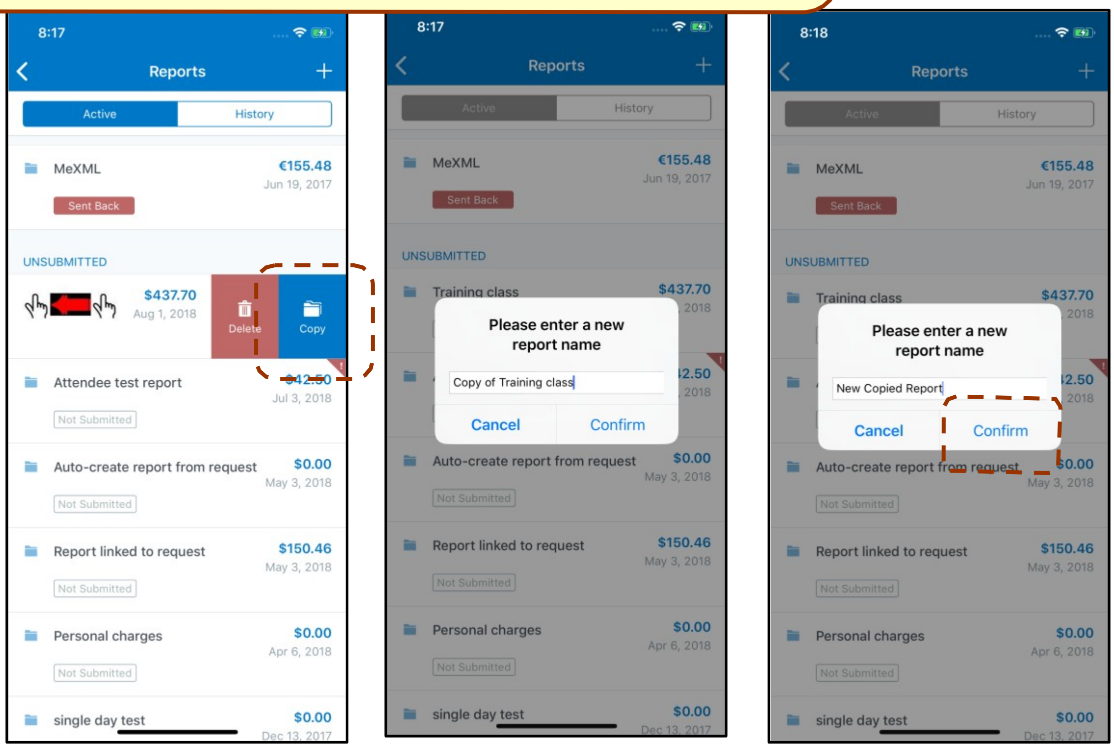
### ICON

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



### *Copy Report From Existing Report*

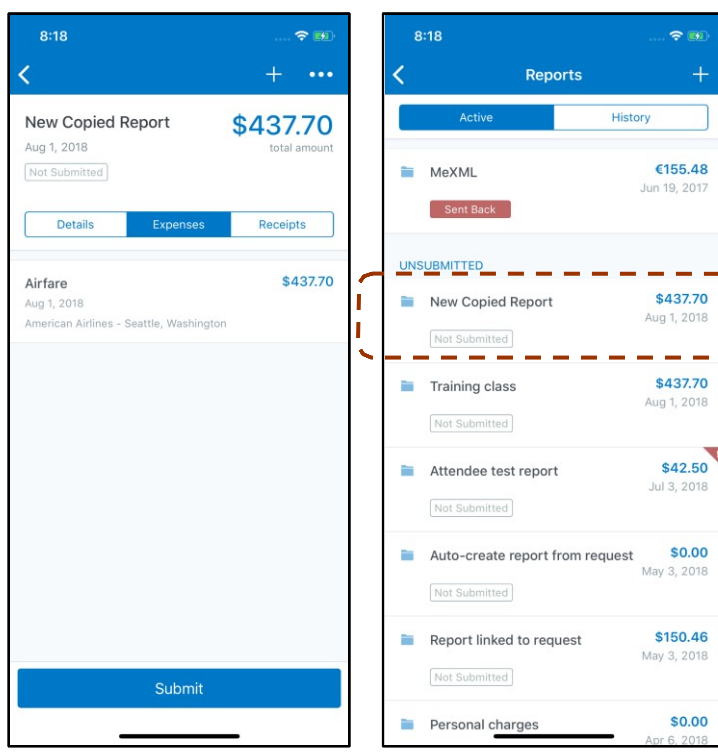
1) On the **Reports** screen, swipe the desired report to the left. The **Copy** option appears.
2) Tap **Copy**. A box appears (with the existing report name), requesting a new report name.
3) Enter the new name and tap **Confirm**.




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 SAP 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.

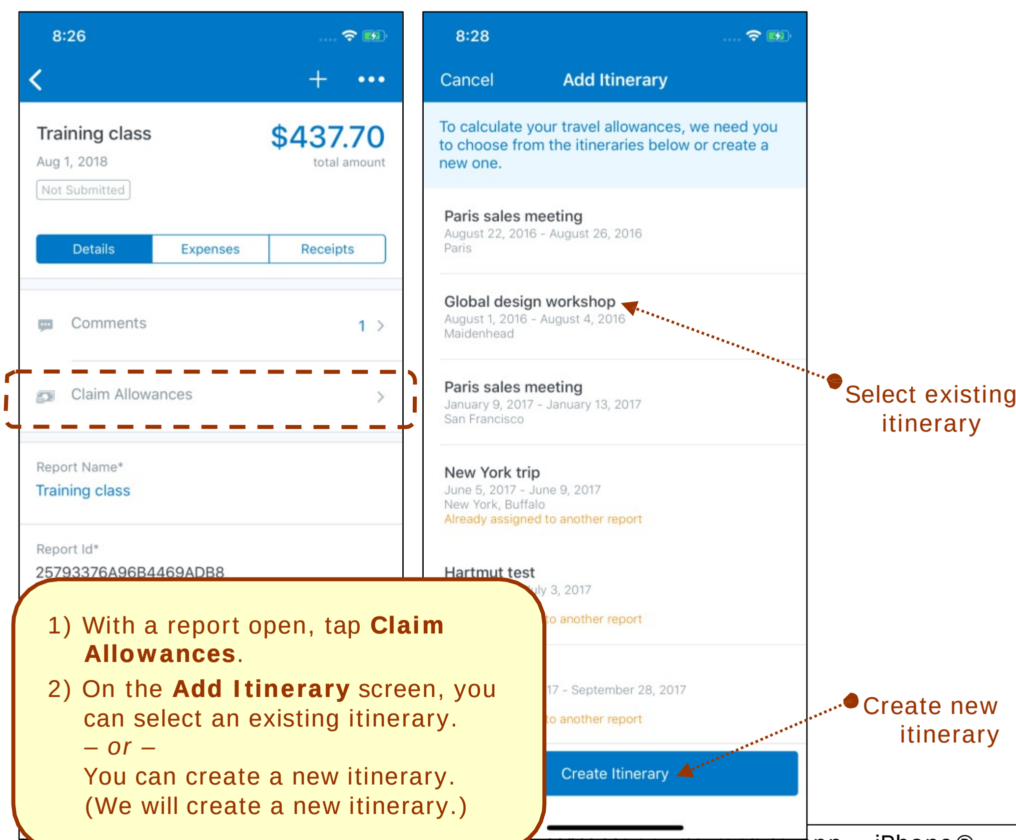
#### RESTRICTIONS

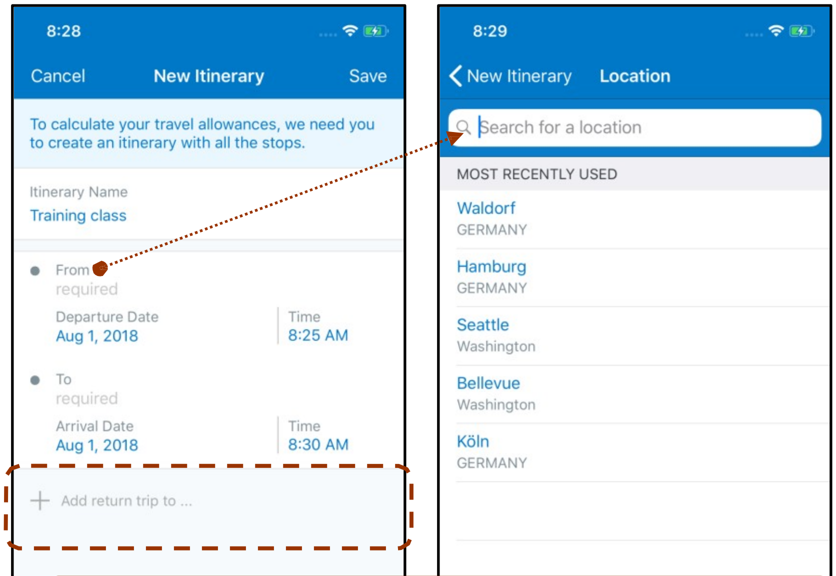
For the most part, fixed travel allowances work the same way in the mobile app as on the web version of SAP Concur – with some exceptions. These configuration options are not available in the SAP Concur mobile app:

- 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 SAP 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 SAP Concur.

#### CREATE FIXED ALLOWANCES

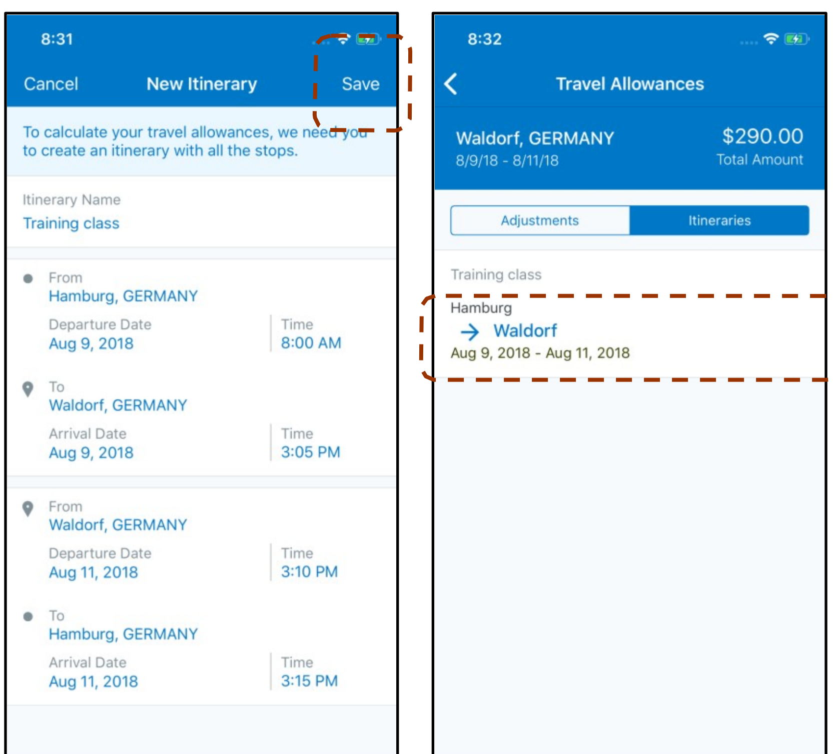





3) On the **New Itinerary** screen:

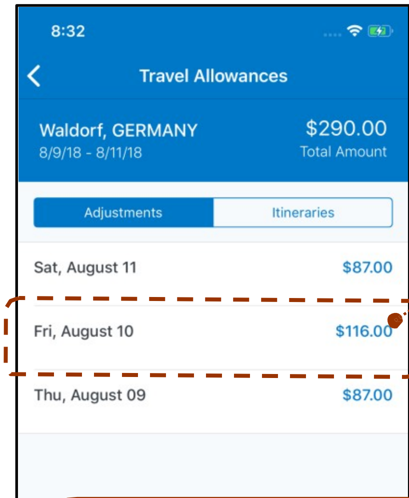
- Enter the itinerary name.
- Enter the departure and arrival location, date, and time.
- Tap **Add return trip to** to obtain the return trip fields.
- Enter the return trip information.

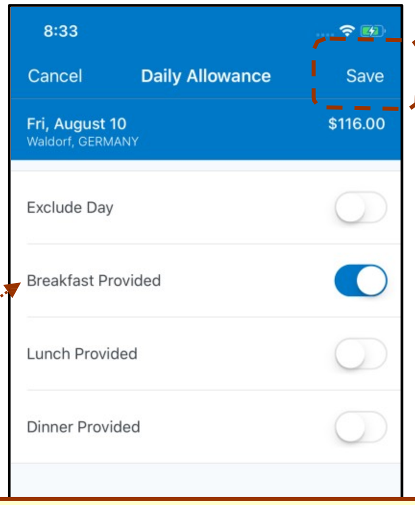
Repeat for each leg of the trip, entering the exact "arrival" address if necessary.



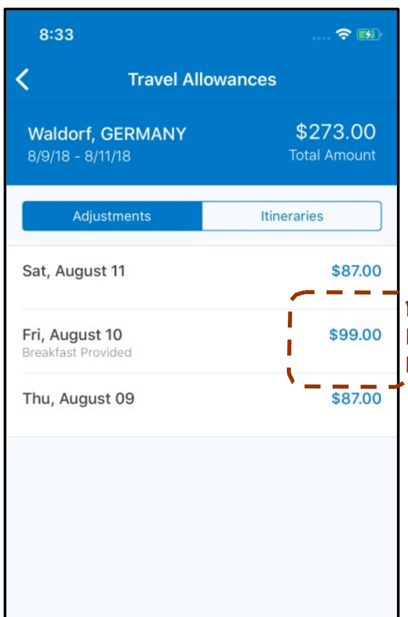

4) On the **Edit Itinerary** screen, review the itinerary for accuracy and tap **Save**.

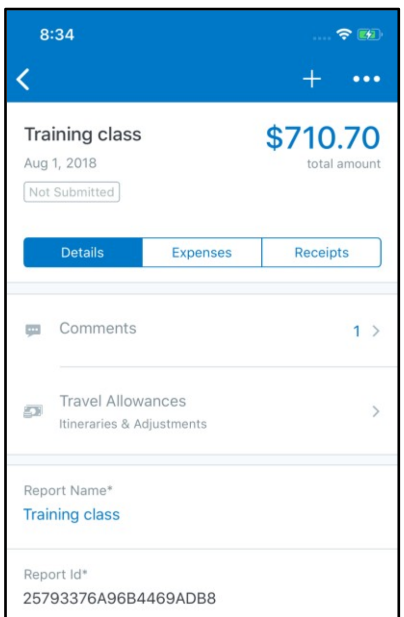
The new itinerary appears on the **Itineraries** tab of the **Travel Allowances** screen.




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 Friday.
     **NOTE:** If the web version of SAP 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 Friday 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 SAP 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 SAP 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.

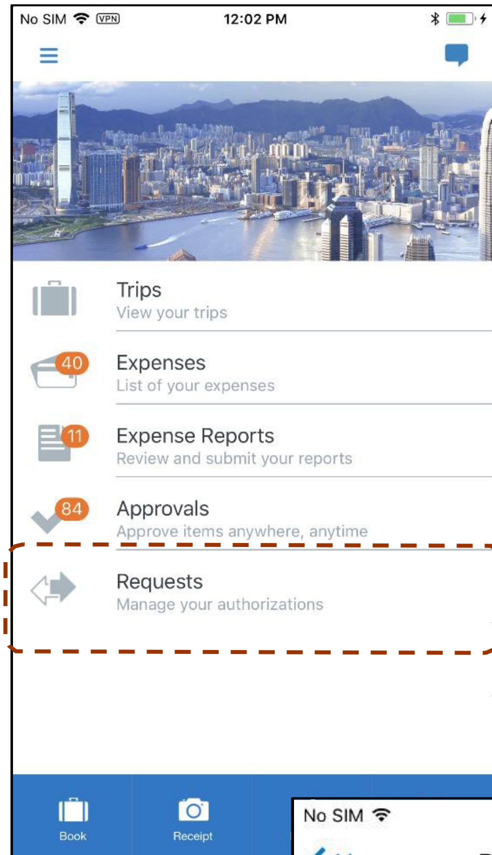
**Not yet available:** These options are not currently available in the mobile app:

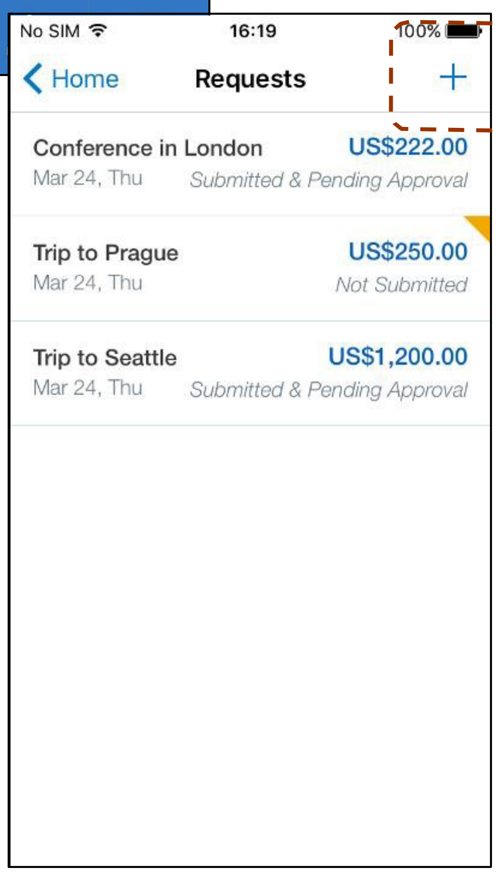
| | |
|---|---|
| Allocations | Request & Travel integration |
| Expected Expenses | Custom Fields |
| Cash Advances | |

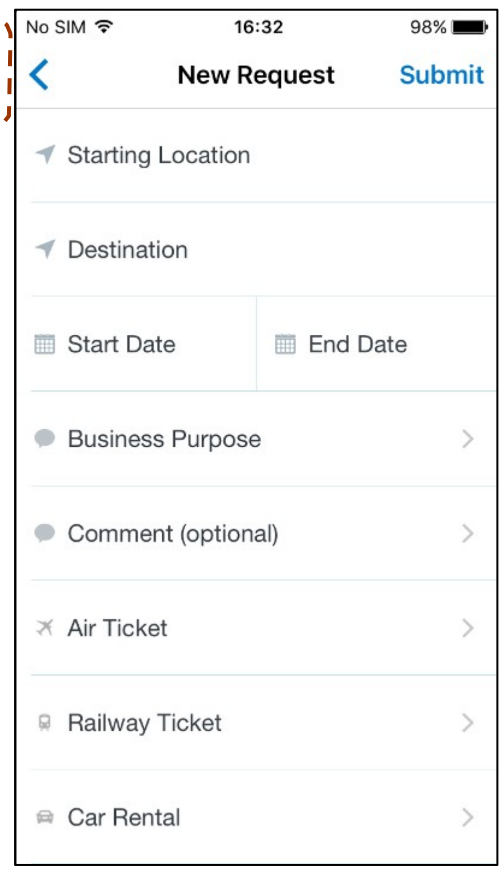
### Create a New Request

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. (SAP Concur provides a request name based on location and destination.)
4) Add your segments (described on the following page).

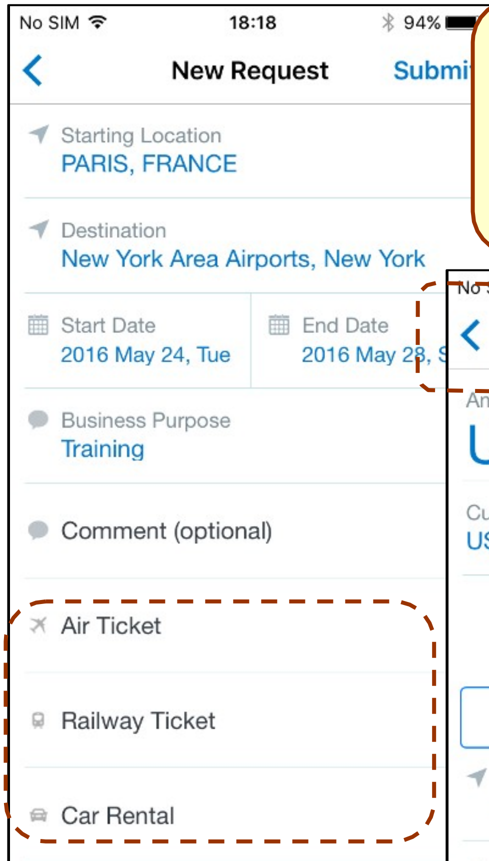


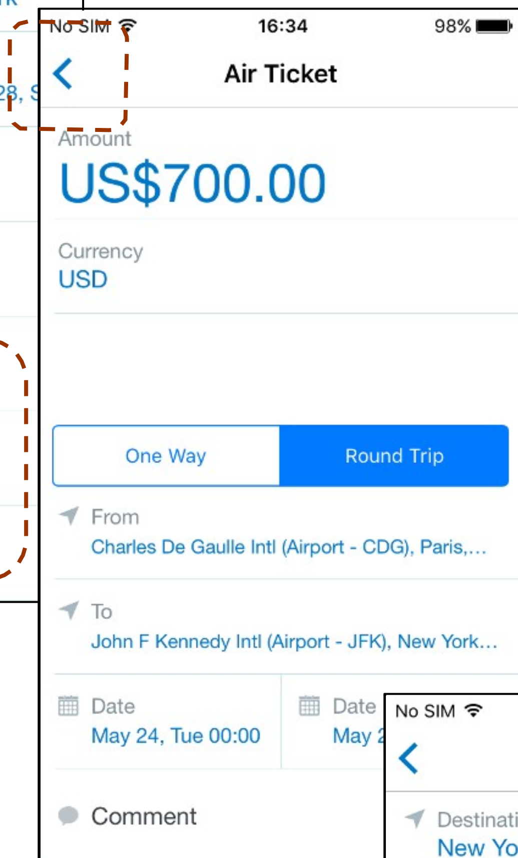



## Add Segments to a Request

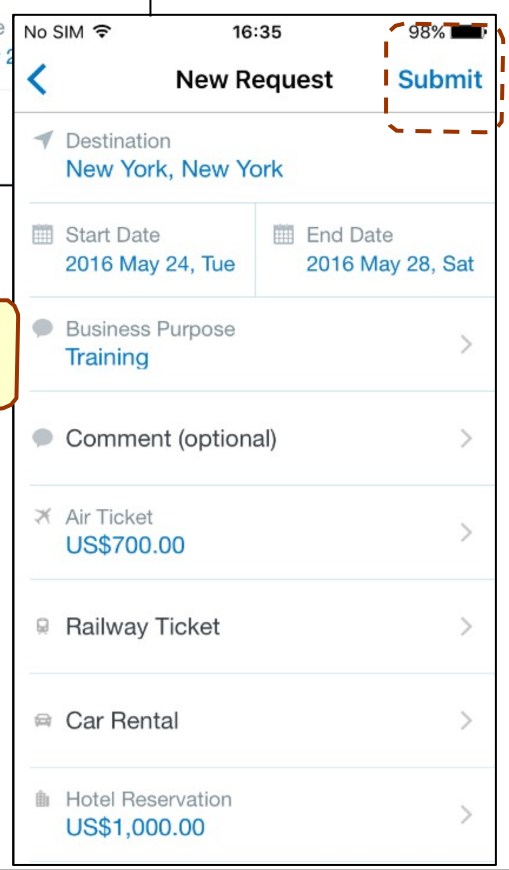
1) On the **New Request** screen, tap a segment type.
2) On the various segments screens, fill in the fields and make the desired selections.
3) Tap [<] (upper-left corner) to return to the **New Request** screen.
4) Add other segments as desired.




## Submit a Request

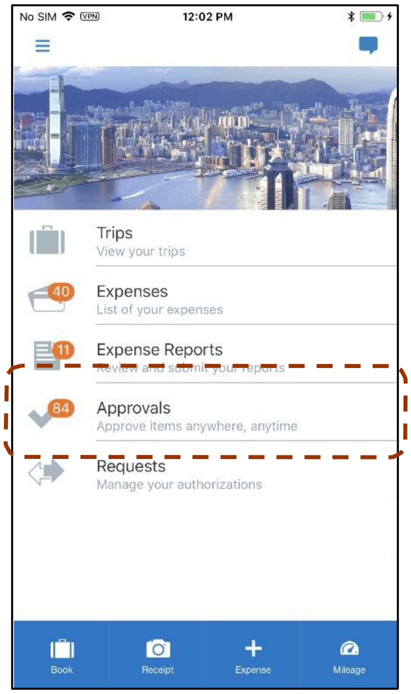
On the **New Request** screen, tap **Submit** (upper-right corner).



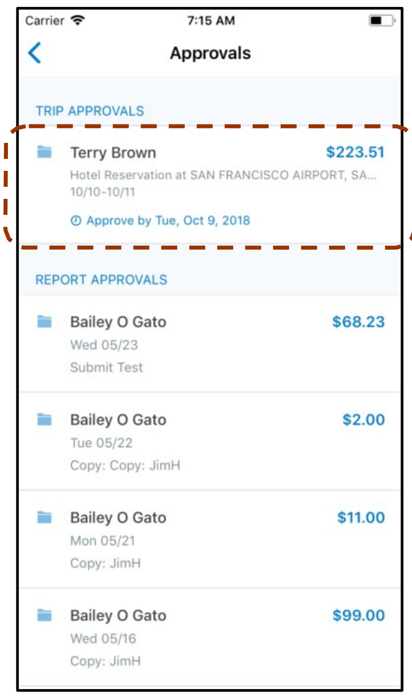
# Approvals

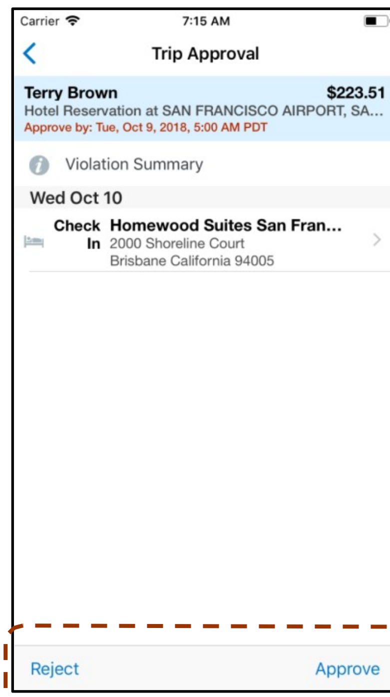
## *Trips*

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.

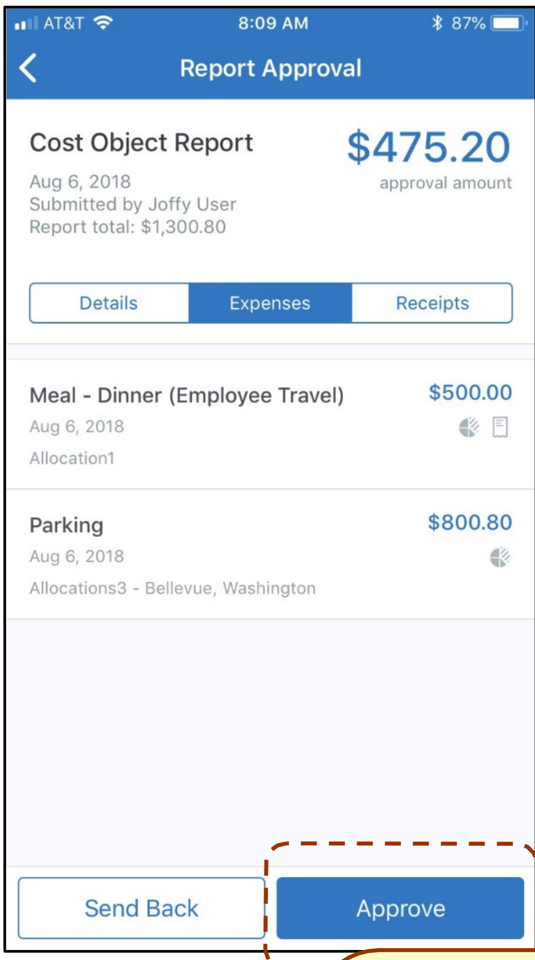
### *Expense Reports*

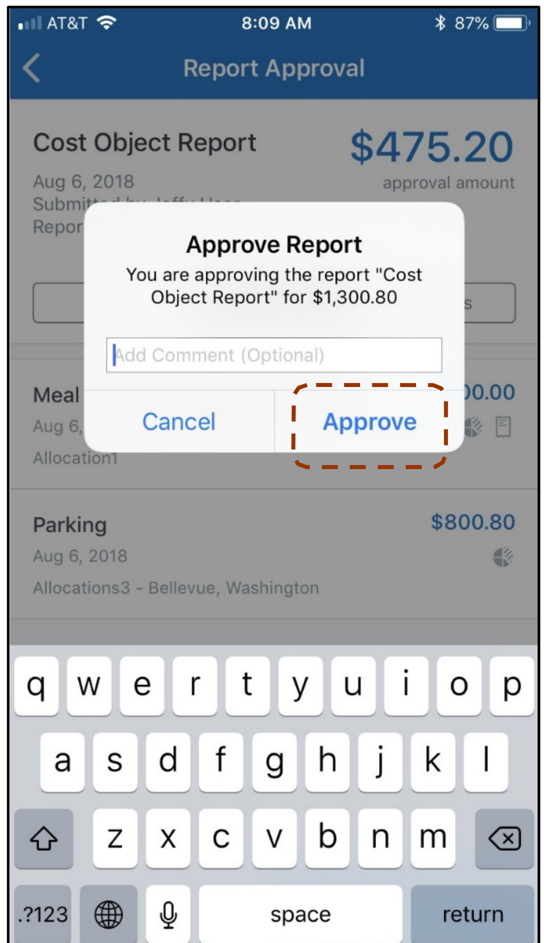
Use **Approvals** on the home screen to view, approve, or send back expense reports (if you are a report approver or cost objects approver).

**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.

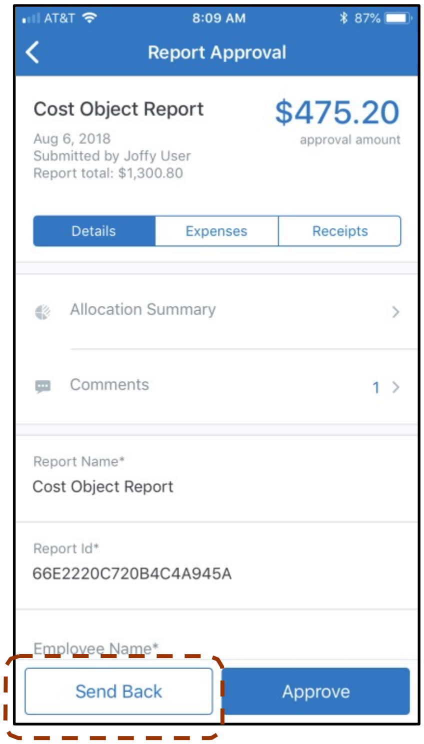
#### APPROVE AN EXPENSE REPORT

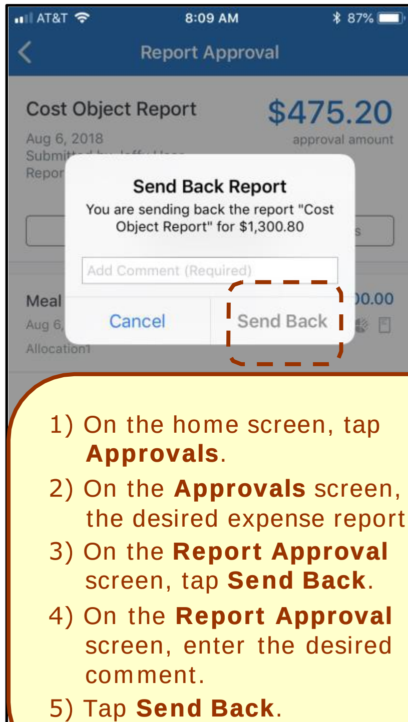



1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap the desired expense report.
3) On the **Report Approval** screen, tap **Approve**.
4) On the **Report Approval** screen, enter the desired comment.
5) Tap **Approve**.

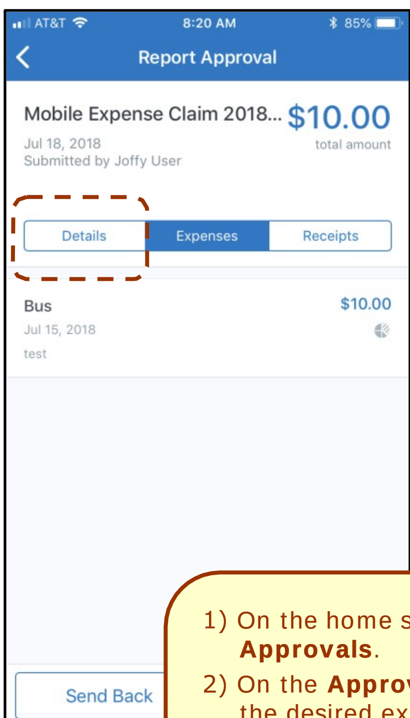
## Send Back an Expense Report

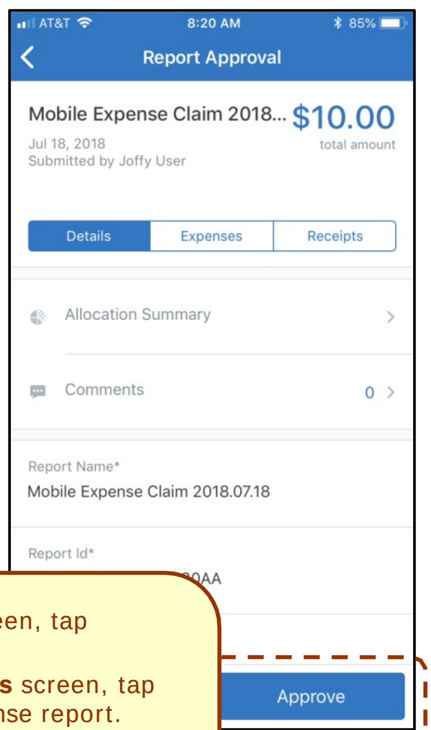



1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap the desired expense report.
3) On the **Report Approval** screen, tap **Send Back**.
4) On the **Report Approval** screen, enter the desired comment.
5) Tap **Send Back**.

## Review and Approve an Expense as a Cost Object Approver



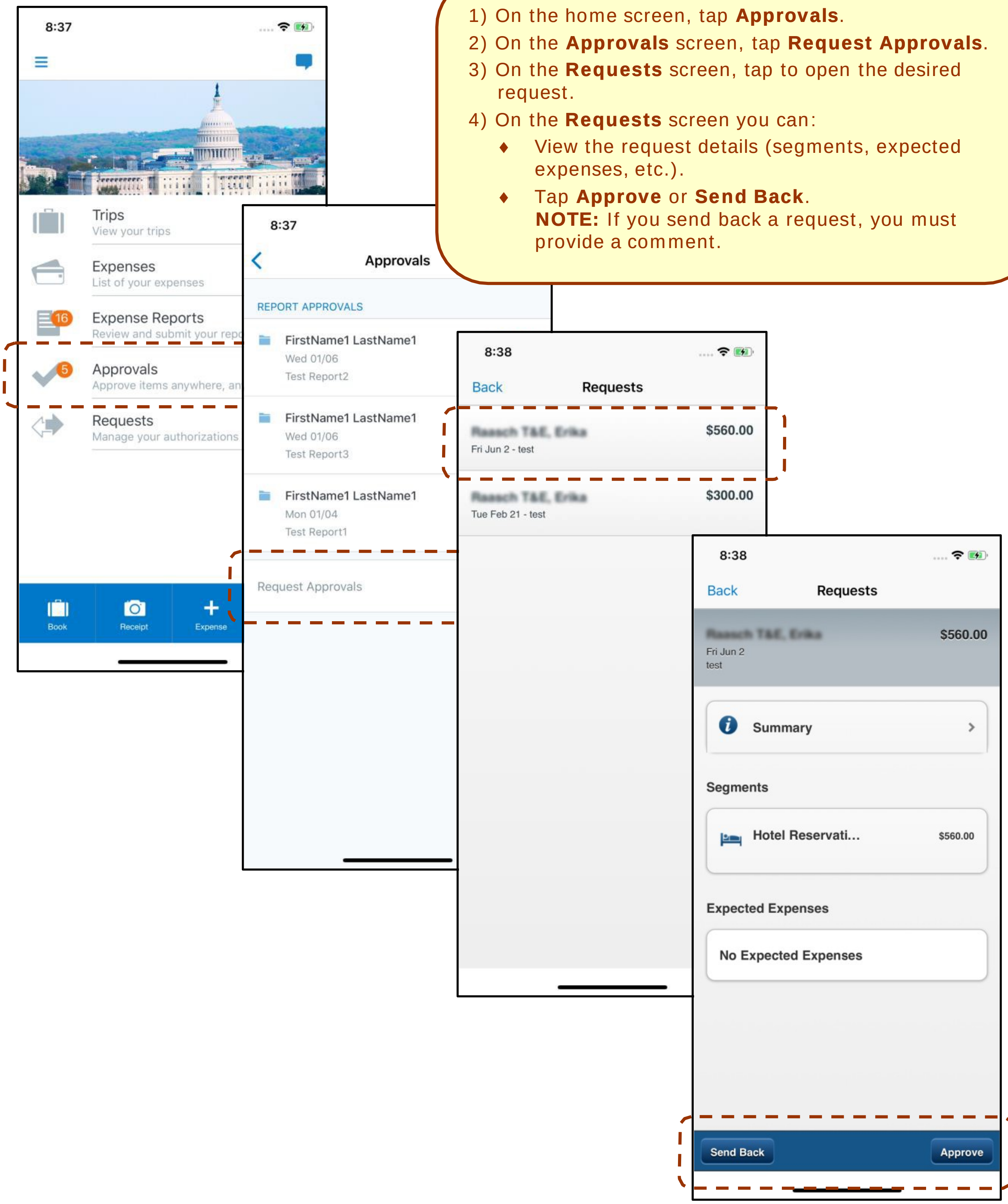




1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap the desired expense report.
3) On the **Report Approval** screen, tap **Details**.
4) When ready to approve an expense, tap **Approve**.

### *Requests*

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

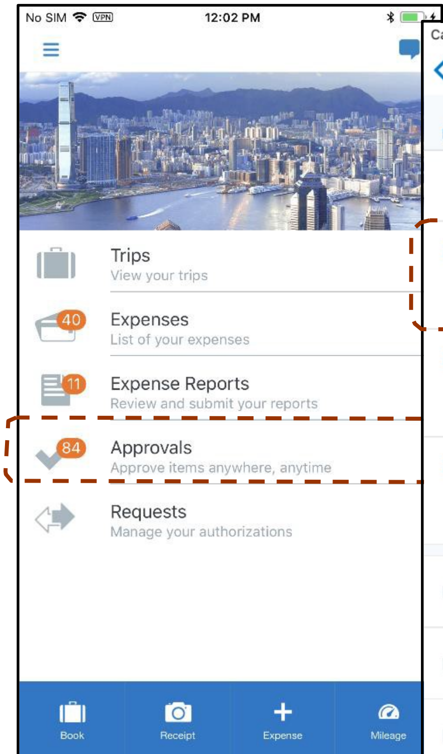
1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap **Request Approvals**.
3) On the **Requests** screen, tap to open the desired request.
4) On the **Requests** screen you can:
   - View the request details (segments, expected expenses, etc.).
   - Tap **Approve** or **Send Back**.
     **NOTE:** If you send back a request, you must provide a comment.

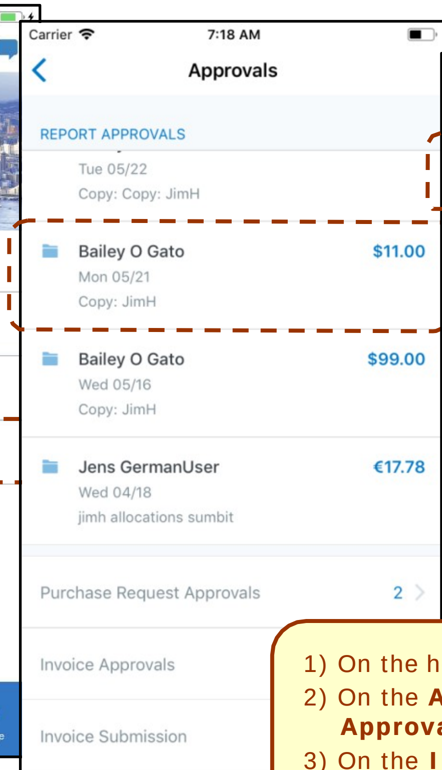


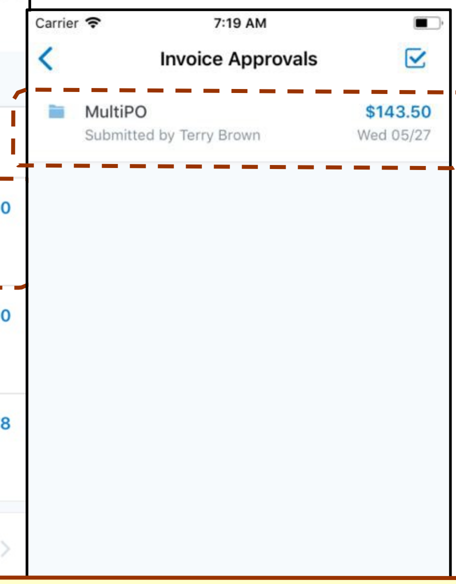
### ***Payment Requests (Invoice)***

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

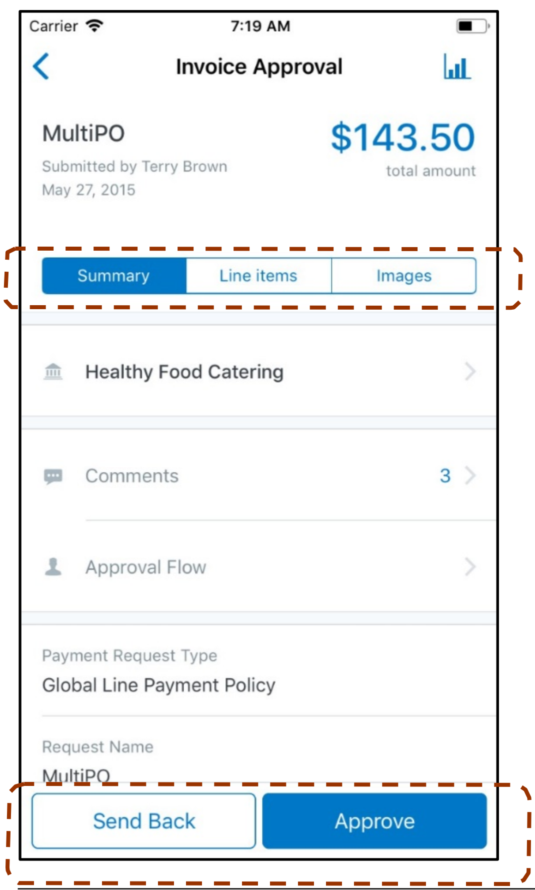
**NOTE:** This also includes Cost Object Approvals and Authorized Approvals.



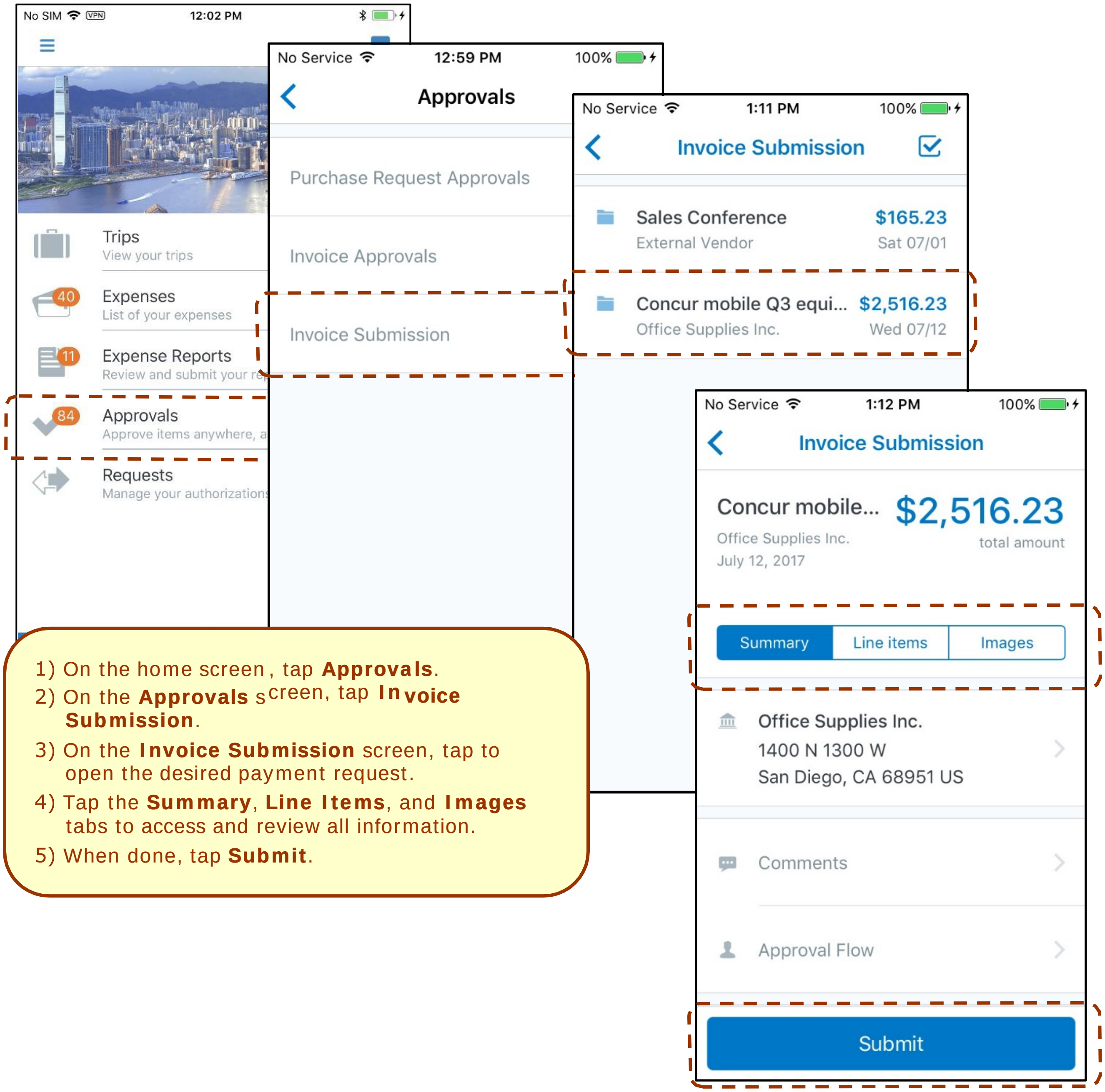




1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap **Invoice Approvals**.
3) On the **Invoice Approvals** screen, tap (to open) the desired invoice.



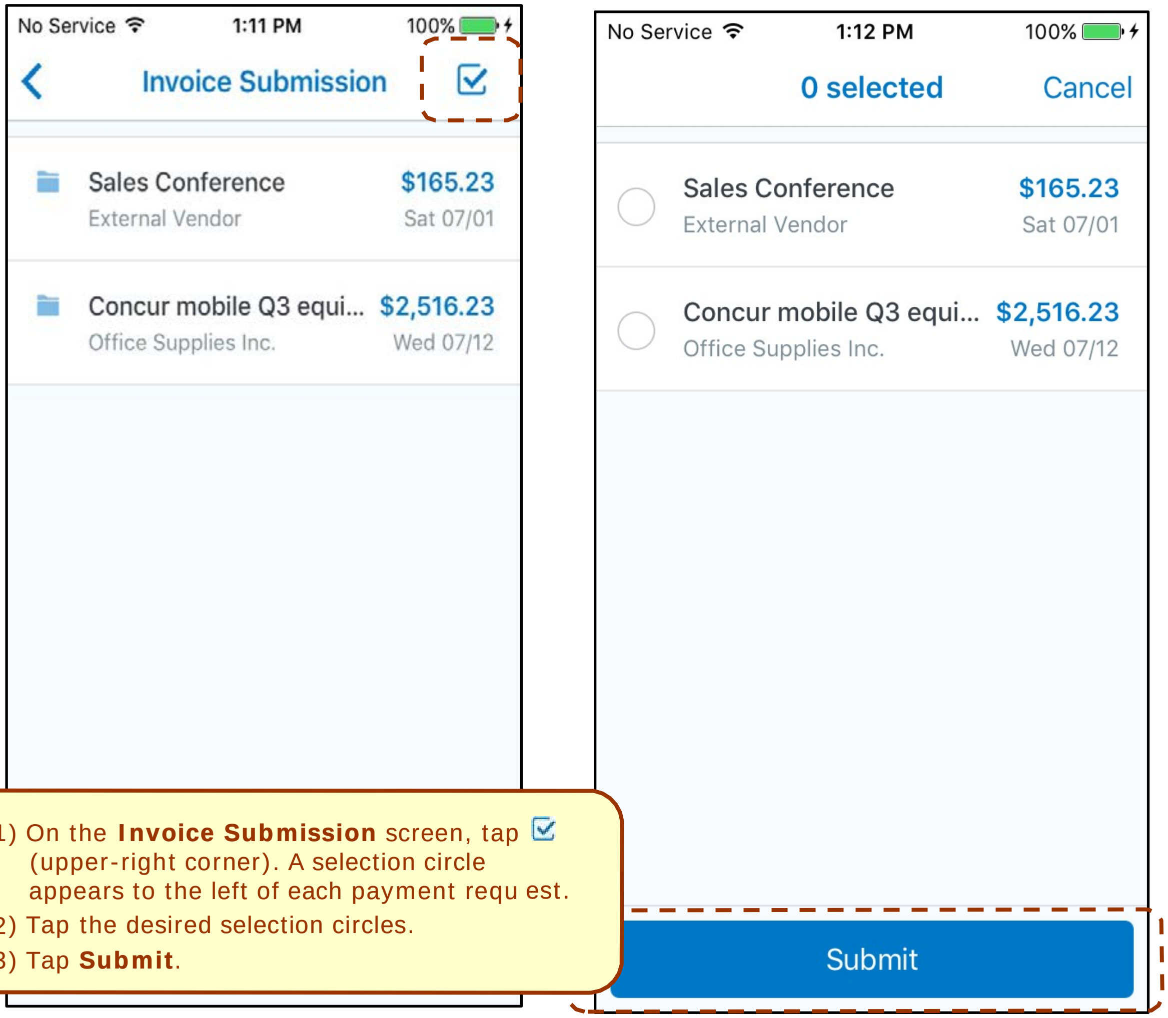

4) On the **Invoice** Approval screen, on the **Summary** tab:
   - Tap **Comments** to review or add comments.
   - Tap **Approval Flow** for the approval information.
   - Tap the vendor name for vendor details.
5) On the **Invoice Approval** screen, on the **Line Items** tab, tap the desired line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

## 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

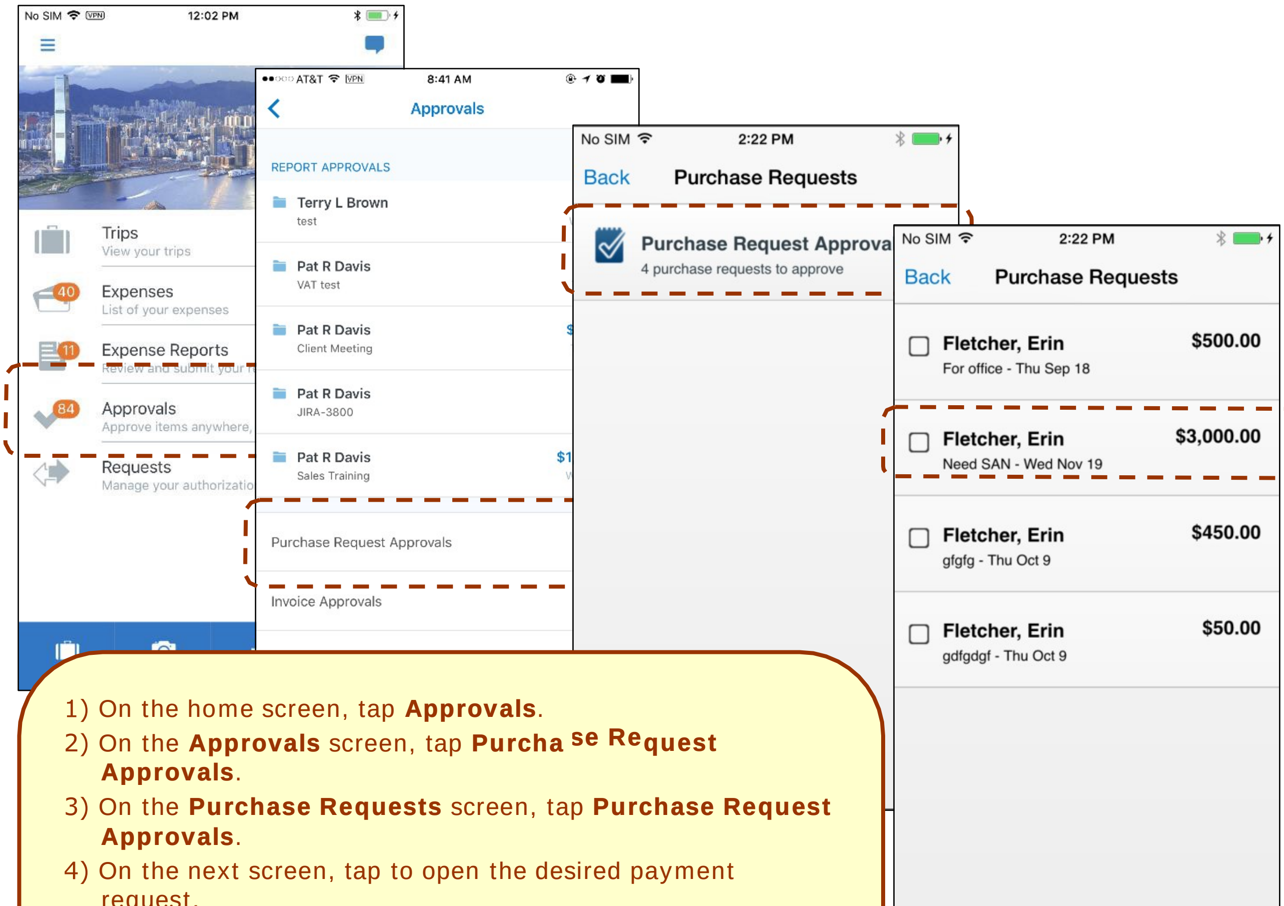



1) On the **Invoice Submission** screen, tap ☑ (upper-right corner). A selection circle appears to the left of each payment request.
2) Tap the desired selection circles.
3) Tap **Submit**.

### Purchase Requests (Invoice)

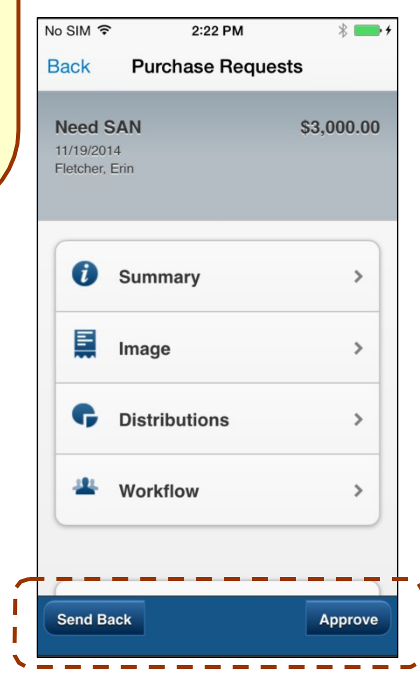
Use **Approvals** on the home screen to approve purchase requests (if you are an approver).

**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 Approvals**.
4) On the next screen, tap to open the desired payment request.
5) On the **Purchase Request Approvals** 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.

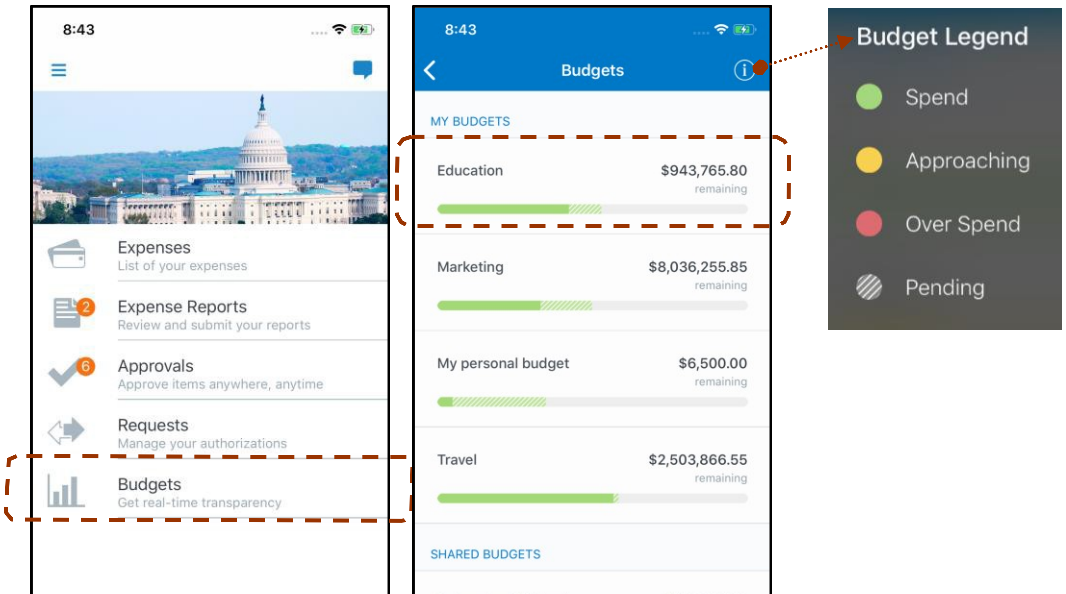


## Budget

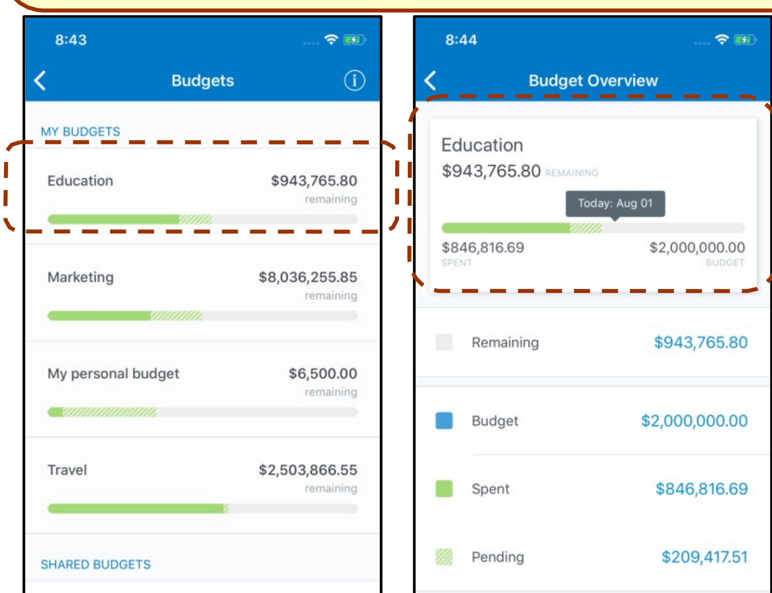
Use **Budgets** on the home screen to see your budget in a yearly, quarterly, and monthly view.

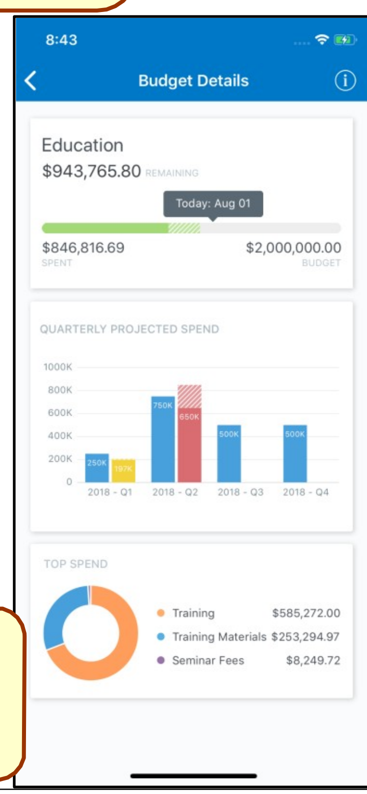
You can toggle between budgets and approvals to see – in real time – if there is enough budget remaining to allow approval of an expense.

**NOTE:** You will be sent push notifications if your budget is approaching its limit or is over limit.




1) On the home screen, tap **Budgets**.
   **NOTE:** The "striped" section of the colored bar indicates pending spend.
2) On the **Budgets** screen, tap the desired budget.
   **NOTE:** The date represents where "today" is in relation to the budget start and end date.

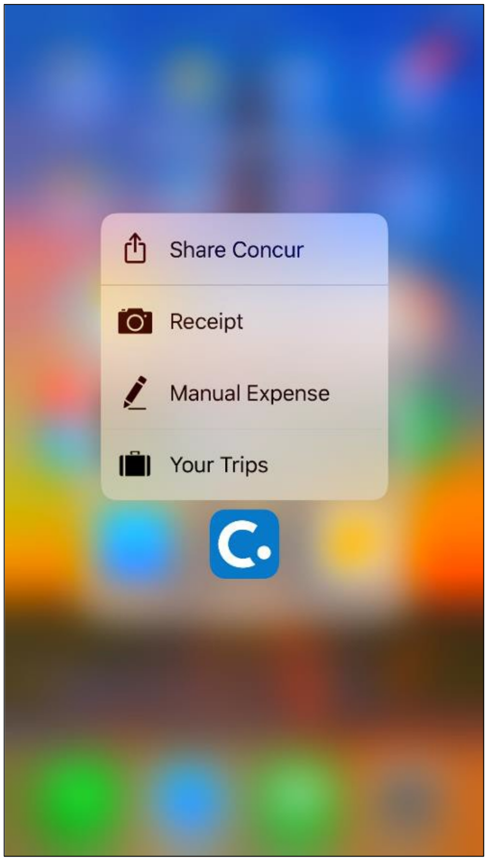



3) On the **Budget Overview** screen, tap the budget section.
The **Budget Details** screen appears.
   **NOTE:** The **Top Spend** chart reflects the overall totals for *all* products associated with the budget.

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

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




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

Using the menu, you can share the SAP 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.

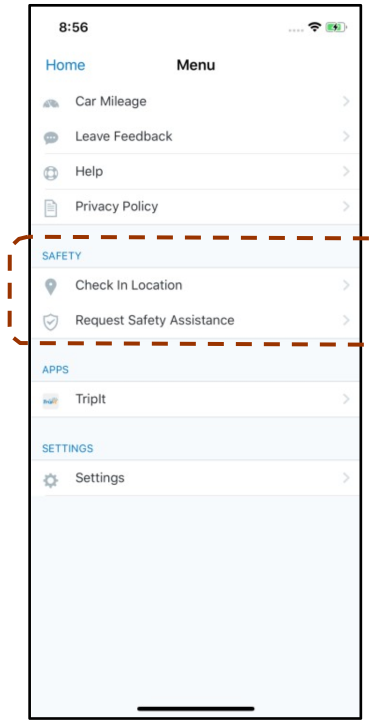
A menu also appears so you can add the expense to a report or delete it from the device.

## Concur Locate

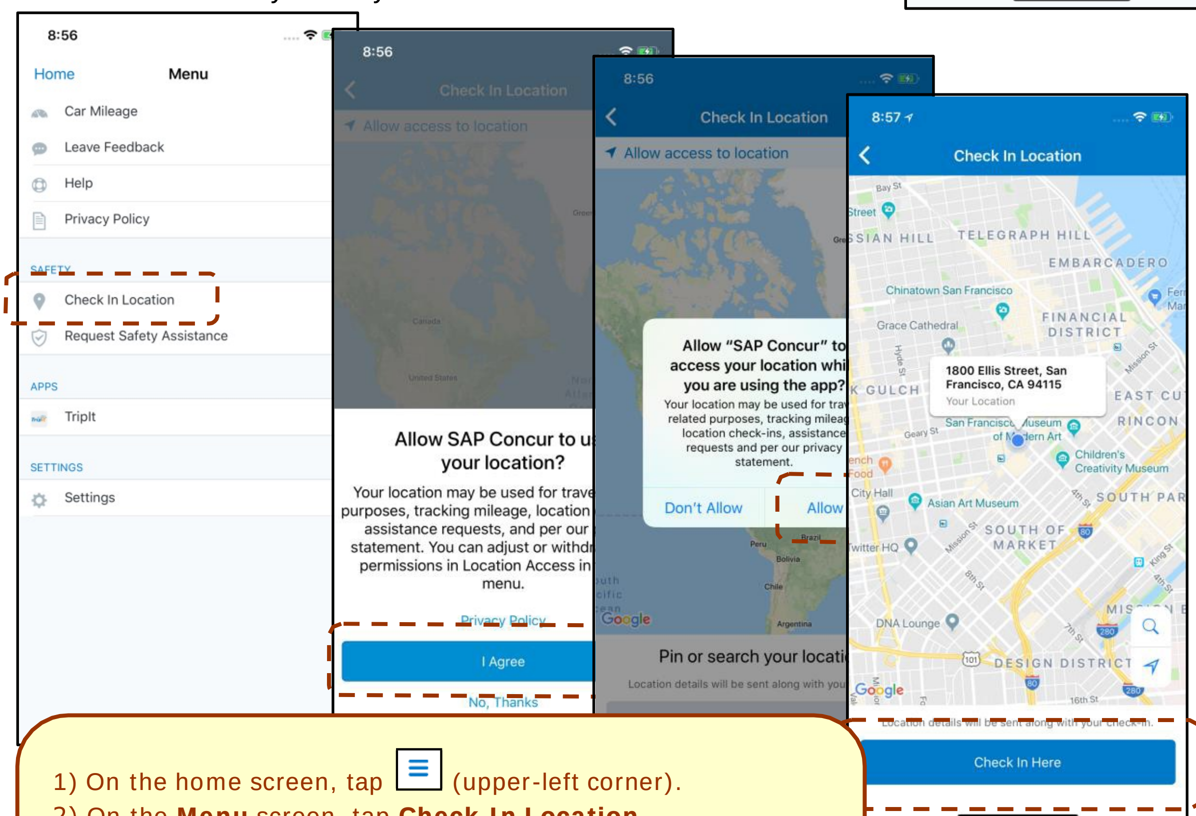
### *Check-in With Location Check In or Request Safety Assistance*

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 SAP Concur mobile app keeps and displays your previous check-in location details.

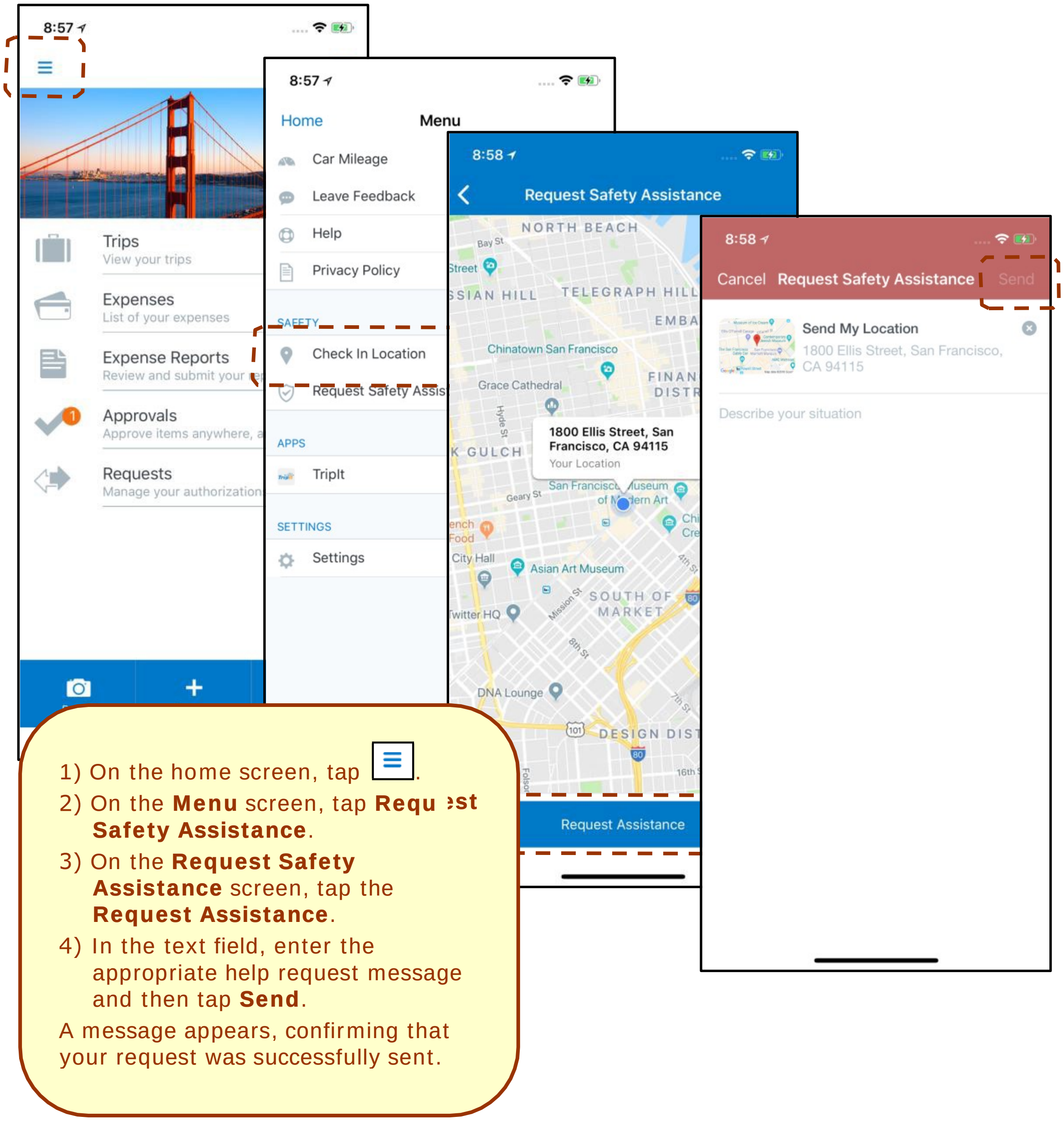



On the **Check In Location** screen, you can check-in to your current location only while your mobile device is online.



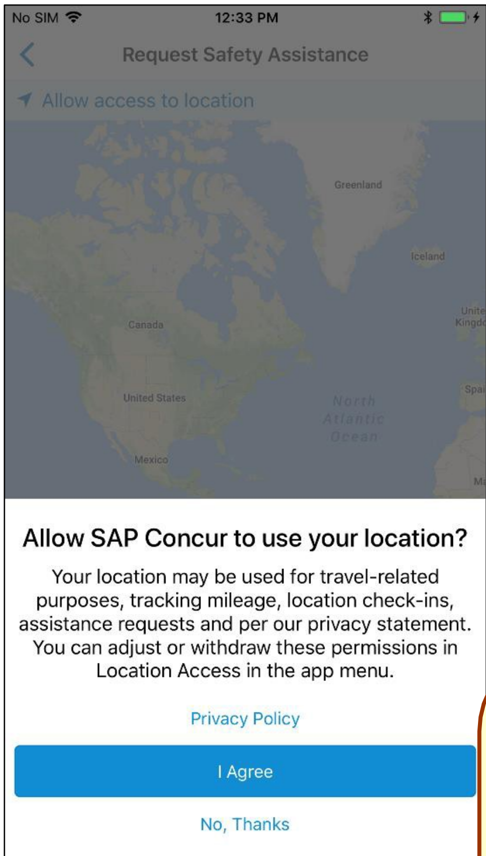

1) On the home screen, tap ☰ (upper-left corner).
2) On the **Menu** screen, tap **Check In Location**.
3) On the **Allow SAP Concur to use your location** window, tap **I Agree**.
4) On the **Allow "SAP Concur" to access your location while you are using the app?** window, tap **Allow**.
5) On the **Check In Location** screen, tap **Check In Here**.

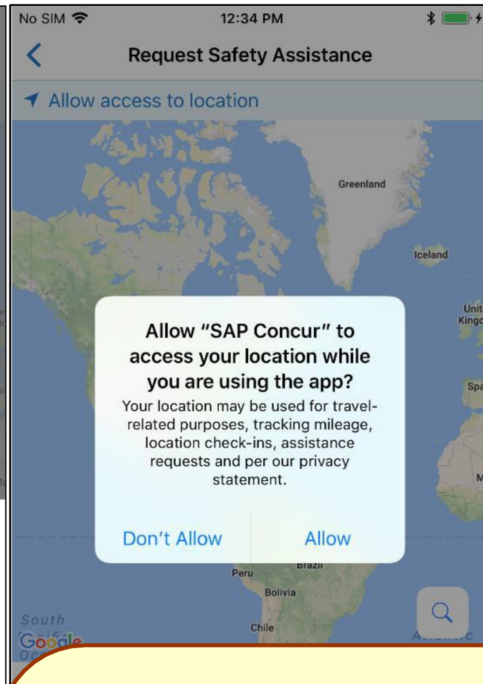
On the **Request Safety Assistance** screen, you can request assistance only while your mobile device is online.



## Location Access

Use the **Location Access** feature to allow/disallow SAP Concur access to your location.

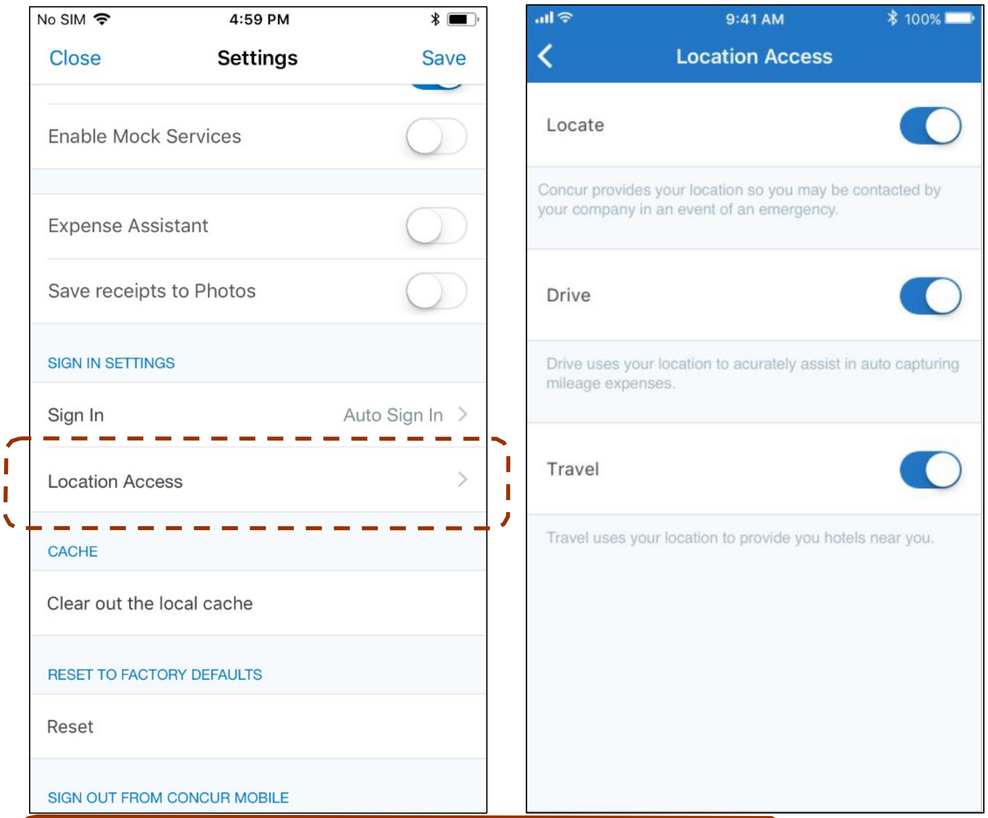



1) On the **Allow SAP Concur to use your location?** screen, tap either:
   - **I Agree**
     – *or* –
   - **No, Thanks**

   **NOTE:** If you tap **I Agree**, the **Allow "SAP Concur" to access your location while you are using the app?** screen appears.
2) On the **Allow "SAP Concur" to access your location while you are using the app?** screen, tap either:
   - **Don't Allow**
     – *or* –
   - **Allow**

Access the **Location Access** feature to select location options.




1) On the **Settings** screen, tap **Location Access**.
2) On the **Location Access** screen, tap the desired location option.

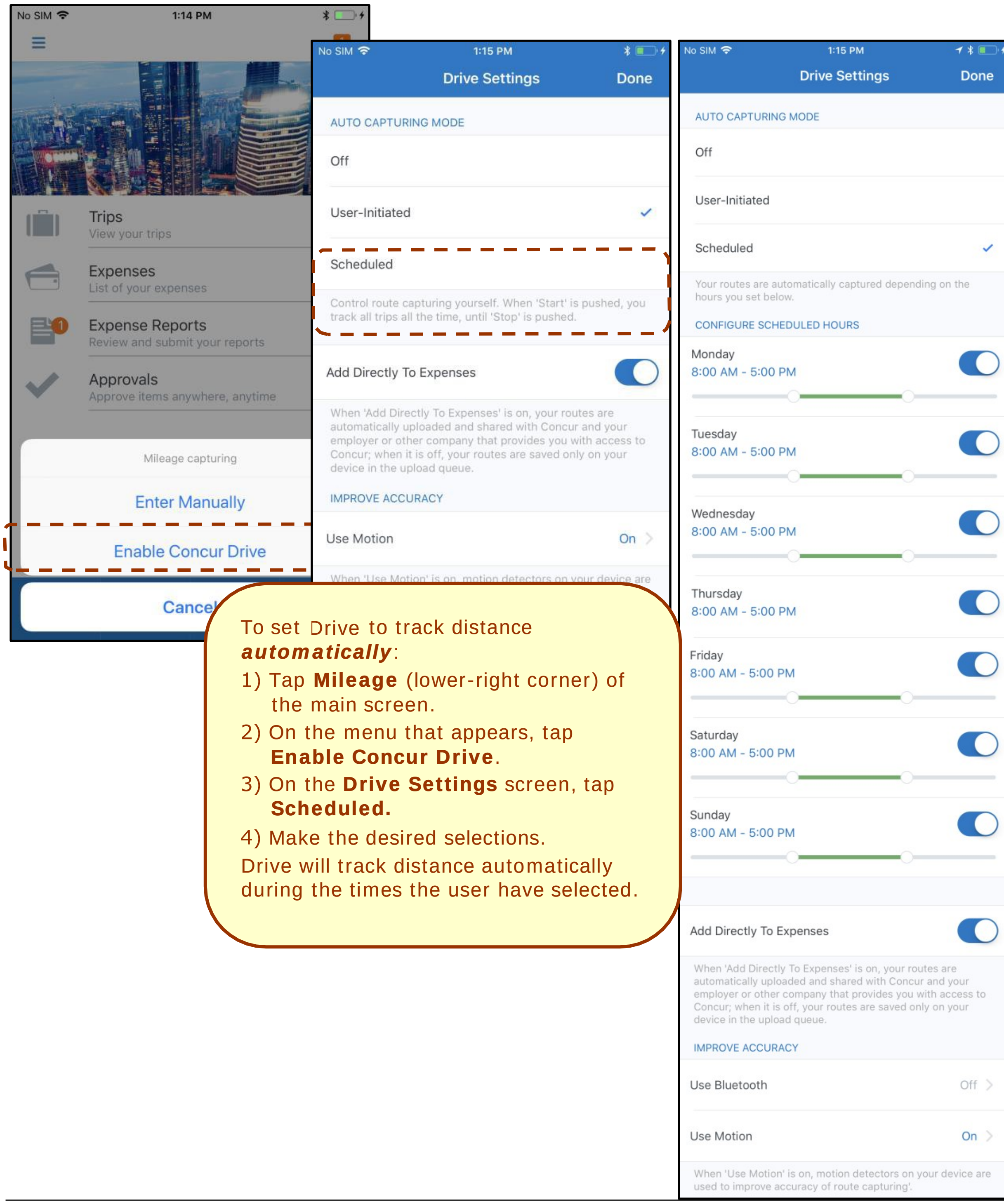
## Concur Drive

If your company uses Concur Drive, you can automatically use GPS to track your travel – either manually or automatically – on your mobile device.

The SAP Concur mobile app captures your route data - which is available in Concur Expense and on the mobile app - where you can select the segments to add to an expense report.

### *Track Mileage Automatically*

Use **Mileage** on the home screen to set up the day and time (for example, Monday through Friday, 8 AM to 5 PM) for which the app will automatically track your trips by detecting car movement.



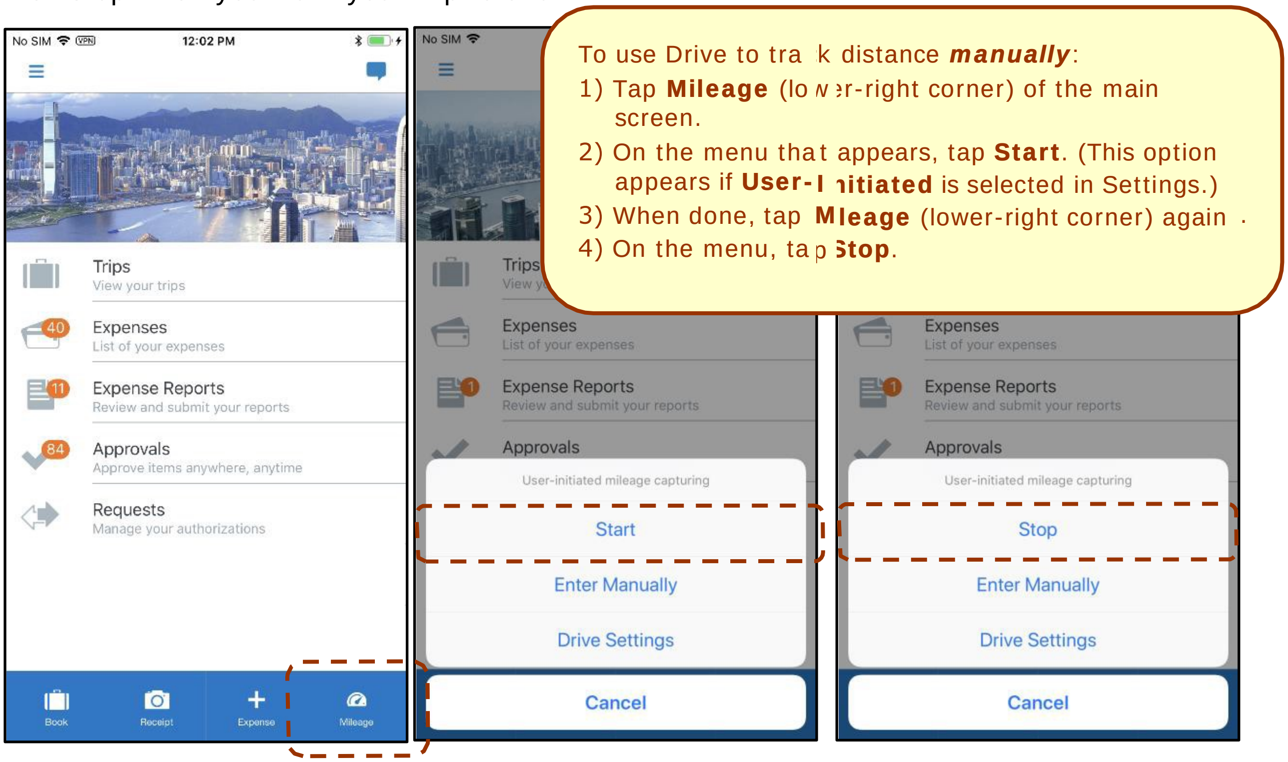

To set Drive to track distance ***automatically***:

1) Tap **Mileage** (lower-right corner) of the main screen.
2) On the menu that appears, tap **Enable Concur Drive**.
3) On the **Drive Settings** screen, tap **Scheduled.**
4) Make the desired selections.

Drive will track distance automatically during the times the user have selected.

### ***Track Mileage Manually***

Use **Mileage** on the home screen to initiate GPS tracking manually with a click of a button and then stop when you want your trip to end.

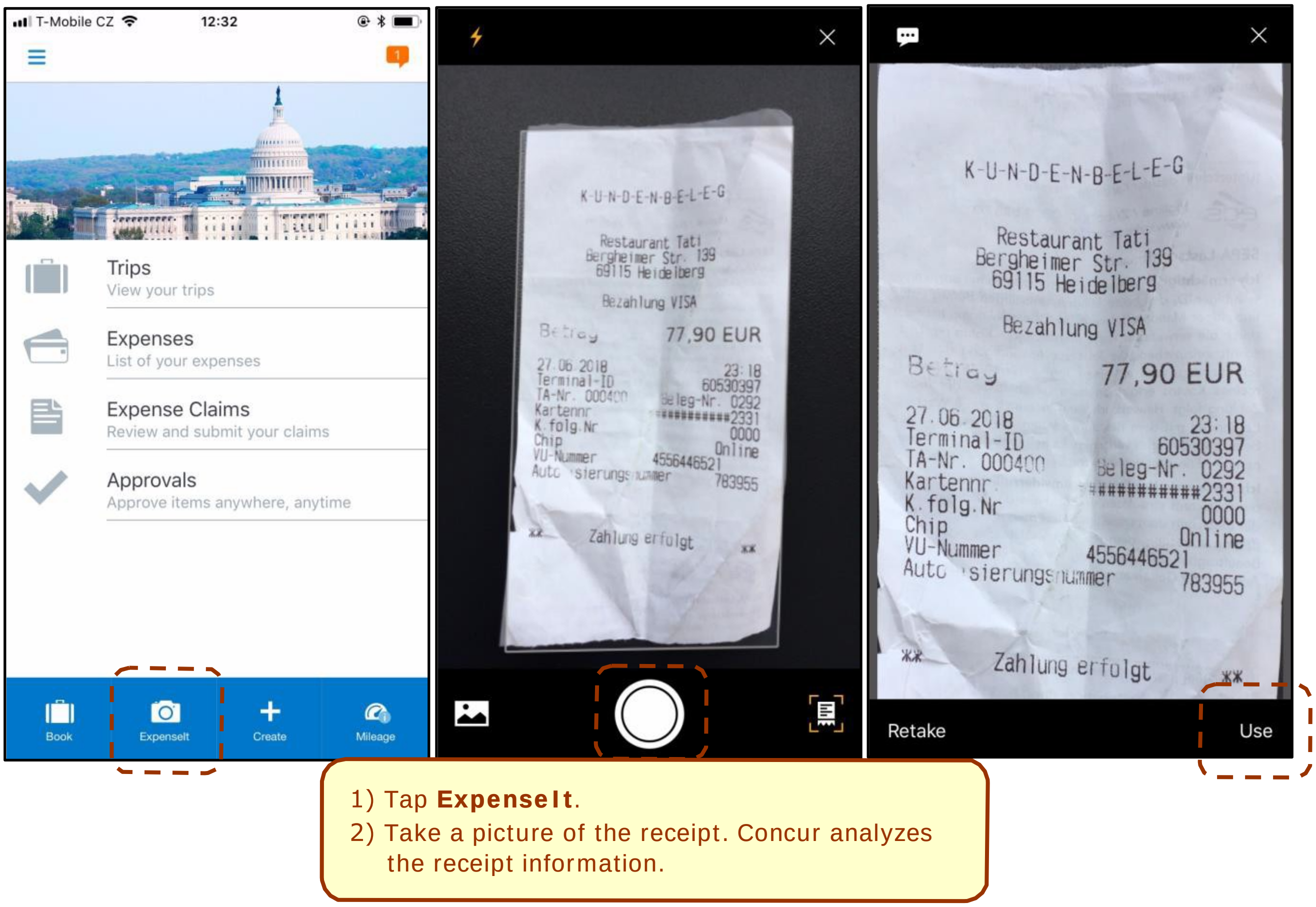


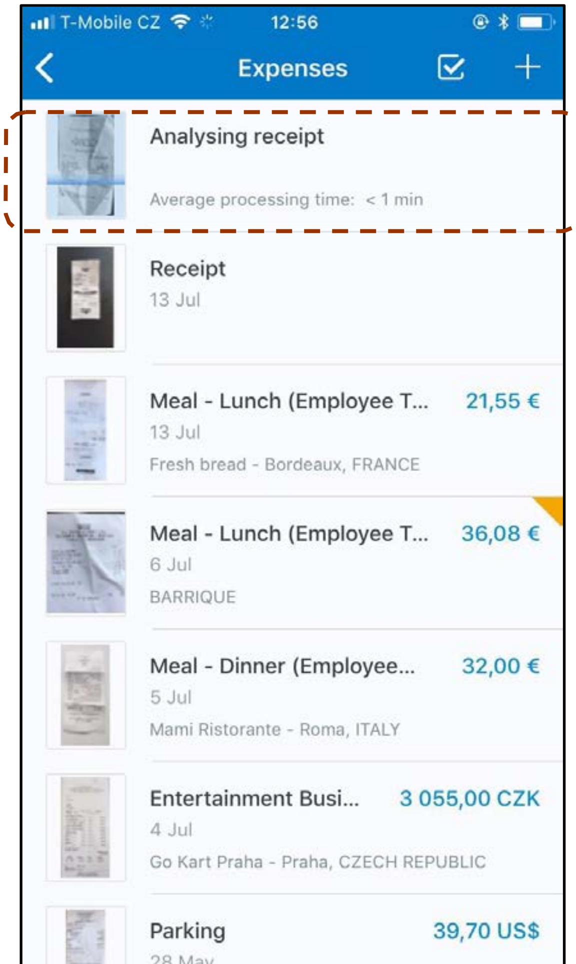
## ExpenseIt

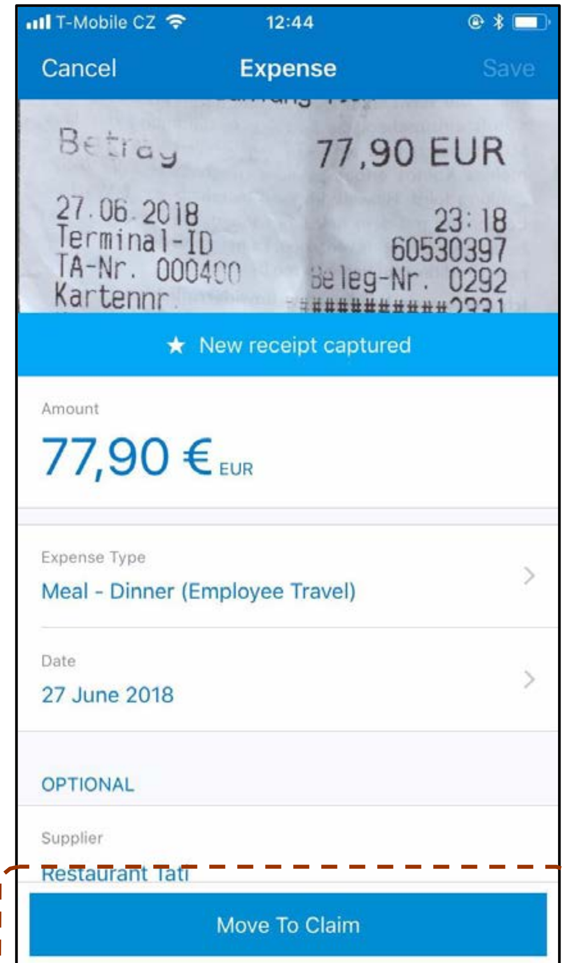
If your company uses ExpenseIt, you can manage your expenses start to finish. The SAP Concur mobile app will turn your receipts into expense entries and then send them directly into Concur Expense.

### *Convert Receipts into Expenses*

Use **ExpenseIt** on the home screen to turn your receipts into expenses.





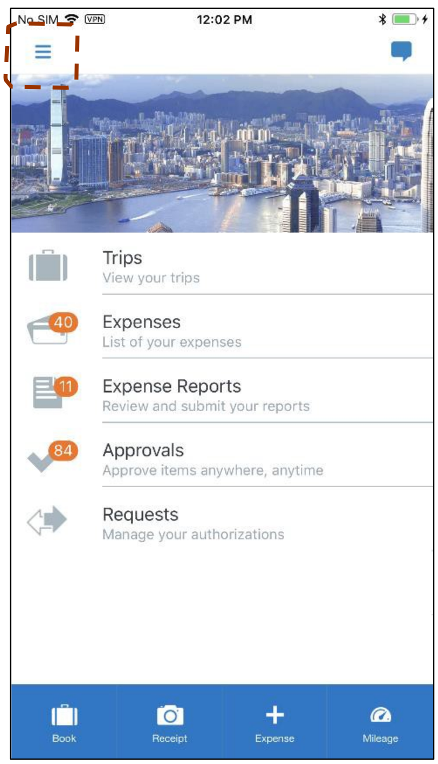

3) When the analysis is complete, open the receipt, attach to a report, edit as necessary, etc.
4) When done, tap **Move To Claim**.

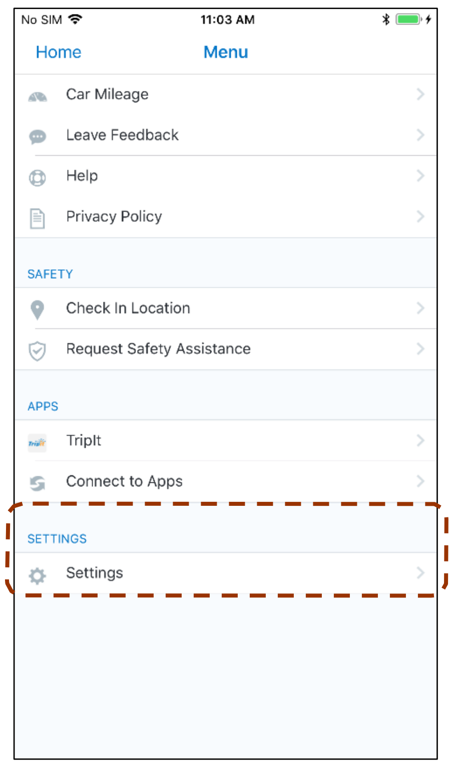
## Settings / Help / Feedback

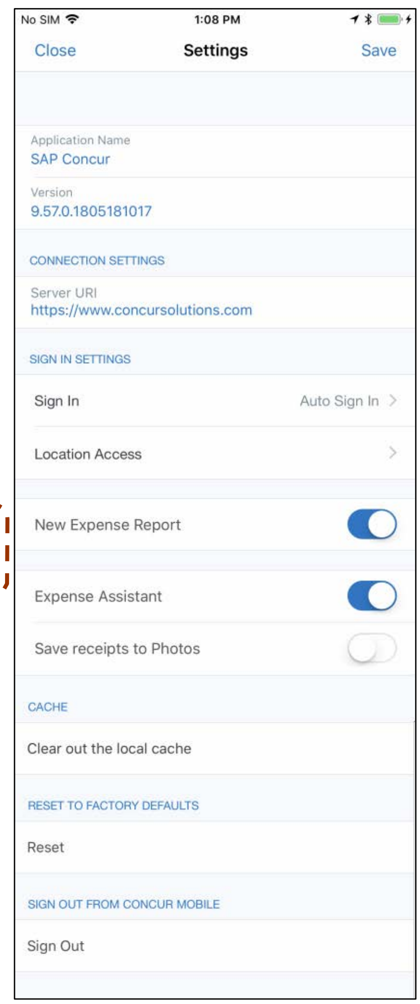
### SETTINGS

Use settings for the following:

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

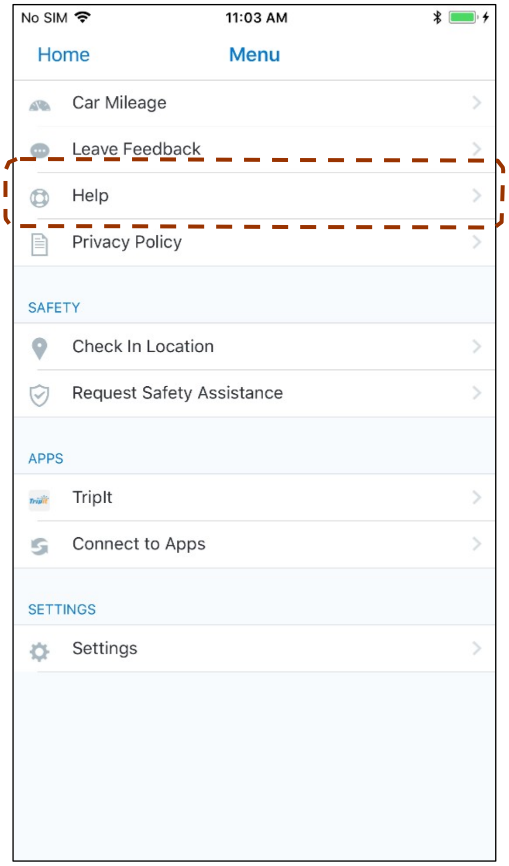


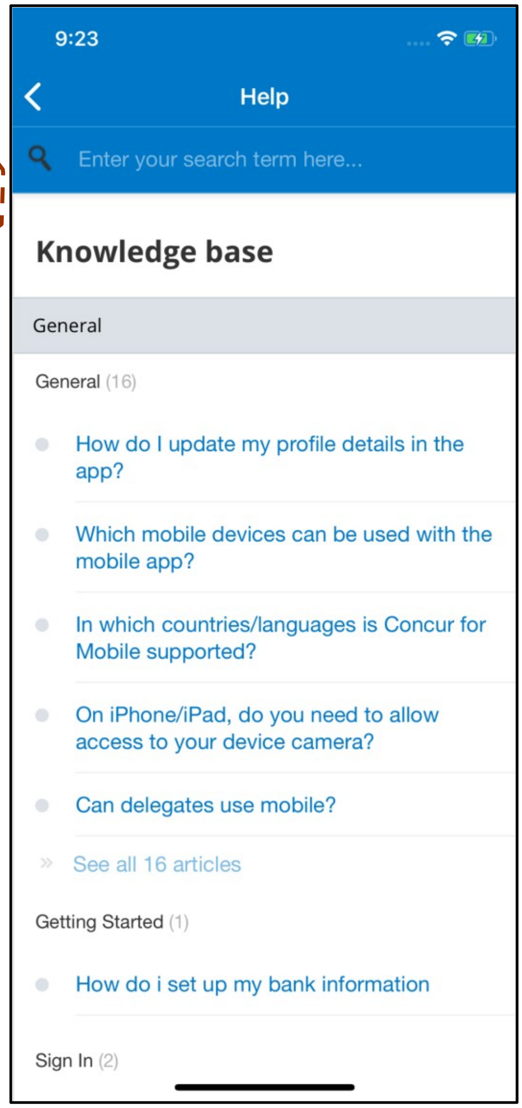



### Get Help

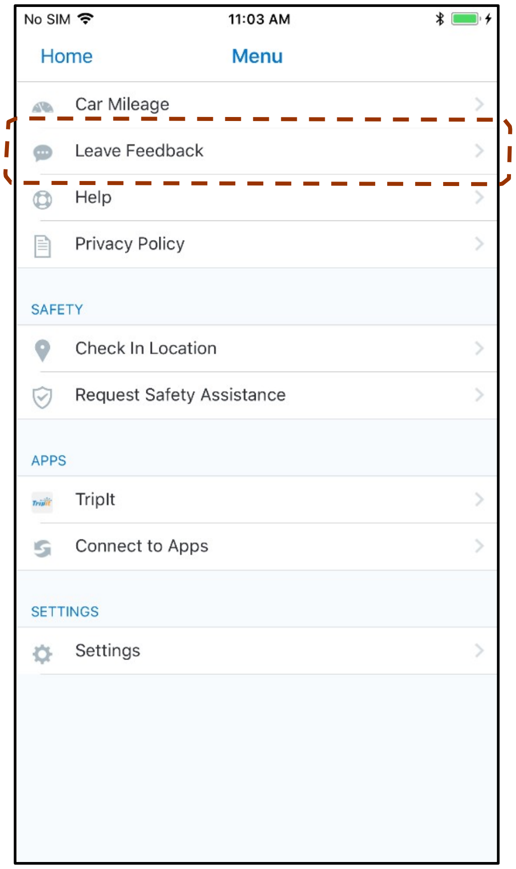
Use **Help** on the **Menu** screen to search for help topics or find helpful articles.

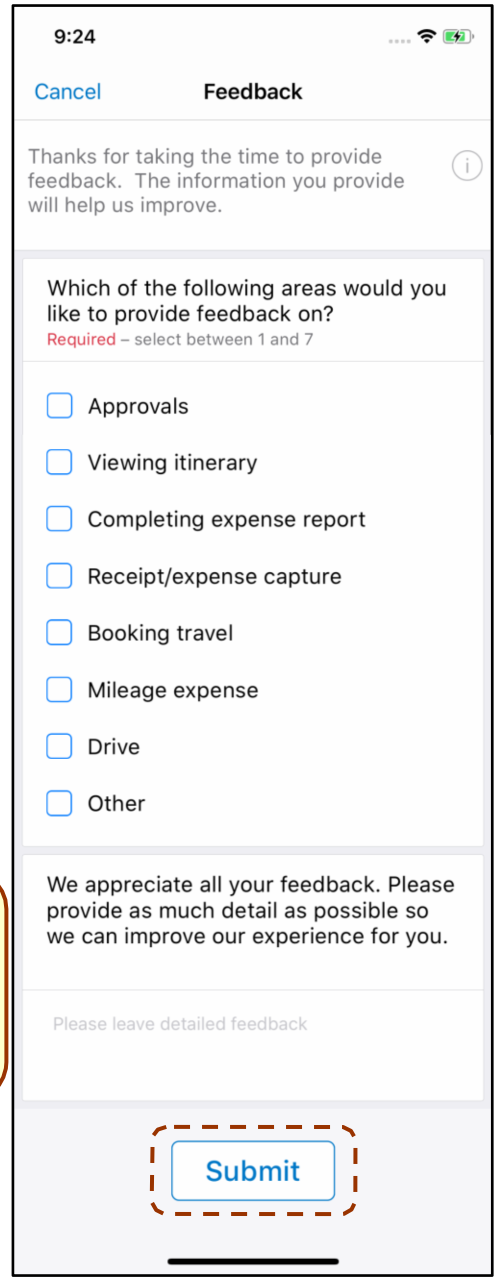


### Leave Feedback

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




1) On the **Menu** screen, tap **Leave Feedback**.
2) On the **Feedback** screen, enter the desired feedback.
3) Tap **Submit**.