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.
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.
Set up PIN for Concur Mobile

To log in to Concur on your mobile device or Concur Connect application, you must enter your Username and a Concur Mobile PIN. Enter a new Concur Mobile PIN in the fields below to set up a new one.

Create PIN: PIN may be letters, numbers and special characters such as _, @, or % but no spaces
Retype PIN: PIN

Set Concur Mobile PIN

Go back to username and password information

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:

Download Concur Mobile
Get the app for your device below

- Available on the App Store
- Google play
- Get it at BlackBerry App World
- Windows Store

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 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:
  - (lower-left corner)
  - (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:
  - [Book](lower-left corner)
  - or –
  - ![Car](upper-left corner) and then **Book Travel**
  - or –

- On the **Trips** screen, tap:
  - ![Book a Trip](lower-right corner)
  - or –

- To add a car to an existing itinerary, with the itinerary open, tap ![Car](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:
  - [ ] (lower-right corner)
  - 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:
  - ♦ (lower-left corner)
  - ♦ (upper-left corner) and then **Book Travel**

- On the **Trips** screen, tap:
  - ♦ **Book a Trip**
  - ♦ (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 website information.

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

The **Travel Agency Info** screen 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.

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**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 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.

**DELETE A SINGLE MOBILE EXPENSE**

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).

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 New Report screen:
   - SAP Concur provides a report name. Change it if desired.
   - Fill in the fields and make the desired selections.
   - Tap Create (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 (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 to 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
   - 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)

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.

CREATE A MOBILE EXPENSE FROM A RECEIPT

1) On the report screen or the Expense Details screen, tap Attach 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.

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.

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**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 *Expense Details* screen:
   - Tap **Allocations**.
   - Tap **New Allocation**.
   - Fill in the fields (if any) and make the desired selections.
   - Tap ![upper-right corner](image) 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 ![ ](image) 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**

1) With a report open, tap **Claim Allowances**.
2) On the **Add Itinerary** screen, you can select an existing itinerary. — or —
   You can create a new itinerary. (We will create a new itinerary.)
On the **New Itinerary** screen:

- Enter the itinerary name.
- Enter the departure and arrival location, date, and time.
- Tap **Add return trip** 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
- Start Date
- Comment
- Business Purpose
- End Date

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

- From Location
- To Location
- Start Date / Time
- Comment
- Amount
- 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
- Rail Ticket
- Hotel
- 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.
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.

1) On the home screen, tap 📞.
2) On the **Menu** screen, tap **Request Safety Assistance**.
3) On the **Request Safety Assistance** screen, tap the **Request Assistance**.
4) In the text field, enter the appropriate help request message and then tap **Send**.
A message appears, confirming that your request was successfully sent.
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.

To use Drive to track distance **manually**:

1. Tap **Mileage** (lower-right corner) of the main screen.
2. On the menu that appears, tap **Start**. (This option appears if **User-Initiated** is selected in Settings.)
3. When done, tap **Mileage** (lower-right corner) again.
4. On the menu, tap **Stop**.
**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.

1) Tap **ExpenseIt**.
2) Take a picture of the receipt. Concur analyzes the receipt information.
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.