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

Among other things – you can check your itinerary; book a flight, rental car, Amtrak, or hotel. 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 trips, expense reports, requests (Concur Request), and payment and purchase requests (Concur Invoice).
Download

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

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

Log In

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

- or –

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

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

Permissions

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

*View an Itinerary*

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

1) On the home screen, tap *Trips*.
2) On the *Trips* screen, tap to open the desired trip.
3) Scroll to view all segments of the itinerary.
ADDITIONAL FLIGHT INFORMATION ON THE ITINERARY

**Trip from Seattle to San Francisco**
- **Tue Jun 16**
  - Alaska Airlines 320
  - Depart Seattle (SEA) 6:05 AM
  - Arrive San Francisco (SFO) 8:15 AM
- **Thu Jun 18**
  - Alaska Airlines 315
  - Depart San Francisco (SFO) 4:15 PM
  - Arrive Seattle (SEA) 6:15 PM

**Done**

**Flight Status**
- Alaska Airlines 320
- Flight Status: Scheduled On-time
- Flight Tracker: Track your flight

**DEPARTURE INFORMATION**
- **Airport**
  - (SEA) Seattle Tacoma Intl
- **Flight Duration**
  - 2 Hours and 10 Minute(s)
- **ArrIVAL INFORMATION**
  - **Arrive**
    - SFO - San Francisco Intl A
  - **Scheduled Arrival**
    - Tue Jun 16 8:15 AM
    - Terminal -- Gate --

**Enterprise**
- Confirmation #: 593328685COUNT
- Pickup: Tue Jun 16 8:15 AM: San Francisco (SFO)
- Return: Thu Jun 18 4:15 PM: San Francisco (SFO)
- Status: Confirmed
- Rate: $180.62
- Rate Type: Daily Rate
- Premium / Car / Automatic transmission / Air conditioning

**Marriott San Francisco Airport**
- Confirmation #: 083305341
- Check In: June 16, 2015
- Check Out: June 18, 2015
- 1806 Old Bayshore Hwy Burlingame
- Phone: 800-228-9000
- Status: Confirmed
- Daily Rate: $349.00
- Total Rate: $784.25
- Cancellation Policy: 96.15 USD CANCEL FEES PER ROOM CANCELLATION PERMITTED UP TO 72 HRS BEFORE ARRIVAL

**Flight Schedules**
- (SEA) Seattle, WA to (SFO) San Francisco, CA
  - **AS 320**
    - SEA Tue 6:05 AM
    - SFO Tue 8:15 AM
  - **AS 316**
    - SEA Tue 9:03 AM
    - SFO Tue 11:00 AM
  - **AS 306**
    - SFO Tue 12:00 PM
    - SEA Wed 12:10 AM
  - **AS 316**
    - SFO Tue 4:15 PM
    - SEA Wed 6:14 PM
  - **AS 306**
    - SFO Tue 5:24 PM
    - SEA Wed 7:23 AM
  - **AS 302**
    - SFO Tue 6:54 PM
    - SEA Wed 8:55 AM
  - **AS 304**
    - SFO Wed 8:25 PM
    - SEA Thu 8:35 AM

**Map of Marriott San Francisco Airport**
Book a Flight

To access the Book Air menu option:

- On the home screen, tap  (lower-left corner) – or –  (upper-left corner) and then Book Travel – or –
- On the home screen, tap Trips. 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 next screen, tap the desired carrier, if applicable.
3) On the next screen, tap the desired flight.
4) On the next screen:
   - Review for accuracy.
   - Fill in the fields (if any) and make the desired selections.
   - Slide to reserve (lower-left 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 home screen, tap **Trips**. 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).

**NOTE:** If you add from the itinerary, the airport and pick-up/drop-off dates are pre-populated.

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).
**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 home screen, tap 🌋. On the **Trips** screen, tap **Book a Trip** – or – ➕ (upper-right corner)
- or –

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

**NOTE:** If you add from the itinerary, the airport and pick-up/drop-off dates are pre-populated.

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

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

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

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

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

You can book a flight or hotel using voice.

Access the menu as usual (as shown on the previous pages):
1) On the **Book Air** or **Hotel Search** screen, whichever applies, tap the microphone.
2) Follow the instructions on the screen.
**Cancel a Hotel or Car Reservation**

1) On the home screen, tap **Trips**.
2) On the **Trips** screen, tap to open the desired itinerary.
3) Tap **Cancel hotel reservation** or **Cancel car reservation** whichever applies.

**View Travel Agency Contact Information**

You can access your agency information from the **Trips** screen.

1) On the home screen, tap **Trips**.
2) On the **Trips** screen, tap **Travel Agency Info** (lower-left corner).
Expenses and Expense Reports

List of Expenses (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. You create mobile expenses on your device. They 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.

NOTE: The icon indicates that there is a receipt image attached.
List of Reports (Active Reports screen)

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

Reports are grouped by: Unsubmitted Reports, Submitted Reports, and Other Reports.

On the Active Reports screen, you can:

- See the name, status, date, and amount of each report
- Delete a report
- Create a new report

Open a report to:

- View and edit the report summary (report header)
- Add receipt images
- Add simple as well as more intricate expenses (car mileage/ kilometers, attendees, and itemizations)
- View, add, edit (add attendees and itemizations), and remove expenses
- Submit your report
**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 💢.

To add a more intricate expense (car mileage/kilometers, attendees, itemizations) - add the expense to an open expense report.

Then:
1) On the **Expense** screen, fill in the fields and make the desired selections.
2) Tap **Add Receipt**.
3) Take a picture of the receipt or grab an existing image from the Photo Album or the (Receipt Store) Available Receipts library.
4) Tap **Save**.
**Create a New Expense Report**

You can create a new report:

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

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

You can attach expenses to an unsubmitted expense report or to a new expense report.

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

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

1) With the report open, tap to open the desired expense.
2) On the Expense Details screen, make the desired changes.
3) Tap Save (upper-right corner).

View and Edit the Report Summary (Report Header)

You can view and edit the report header information.

1) With the report open, tap Report Summary.
2) Make the desired changes.
3) Tap Save (upper-right corner).
Add a Personal Car Mileage/Kilometer Expense

To add a personal car mileage expense:

- Tap the **Mileage** button on the home screen (lower-right corner)
  - or –
- Tap ☐ (upper-left corner) and then **Car Mileage**
  - or –
- Tap **Add New Expense** on an open report

Adding a variable-rate personal car mileage expense is the same, except – depending on your company’s configuration – you may also be able to:

- Select a different vehicle.
- Enter the number of passengers.

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

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

3) On the **Add Car Mileage** screen:

- Fill in the fields and make the desired selections.
  **Note:** Concur calculates the amount based on the distance and the company’s mileage rate.
- Tap **Save** (upper-right corner).
**Itemize an Expense on an Expense Report**

You can itemize an expense if the expense is attached to an expense report.

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

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

In this case, the expense amount is $466.02, the total room and tax is $450.00, so the remaining amount to itemize is $16.02.
Add Attendees to an Expense on an Expense Report

You can add attendees to the expense if the expense is attached to an expense report. (Just like with the web version of Concur, only certain expense types require attendees.)

You can:

- Select from the device contacts list
- Enter attendee information manually
- Search and select from your Favorite Attendees list; search for and select an attendee group; search and select from your company’s attendee list; search and select from an external source (like Salesforce)

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

To remove an attendee from an expense, swipe the attendee name. The Delete button appears. Tap Delete.

For favorites or groups:
1) Tap Quick Search.
2) Type part of the attendee's last name or the attendee group name.
3) Tap the correct attendee or group in the search results.

For your company's attendee list or to search in an external source:
1) Tap Advanced Search.
2) Select the appropriate attendee type (or external source, if applicable).
3) Enter the search criteria.
4) Tap Search.
5) Tap the correct attendee in the search results.
Refresh Expense List and Report List

To refresh data, for example, expenses and reports, pull down from the top.
Delete an Expense from the Expenses Screen

You can delete *mobile* expenses from the Expenses screen.

**NOTE:** If you are allowed to delete card transactions in the web version of Concur, then you can delete them here, too.

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

Delete an Expense Report from the Active Reports Screen

You can delete an *unsubmitted* expense report from the Active Reports screen.

**NOTE:** If you delete a report that contains *mobile* expenses or expenses created from card transactions, the *mobile* expenses and card transaction expenses are not really deleted; they move back to the "pool" of expenses on the Expenses screen. (Any receipts associated with *mobile* expenses or card transaction expenses remain as well.)

Any other type of expense is truly deleted. (This is consistent with the web version of Concur.)

1) On the Active Reports screen, swipe the desired report. The Delete button appears.
2) Tap Delete (lower-left corner).
**Delete an Expense from an Unsubmitted Expense Report**

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

**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 Concur.)

1) On the report, swipe the desired expense. The **Delete** button appears.
2) Tap **Delete** (lower-left corner).

**Submit Your Report**

When ready, tap **Submit** (lower-right corner).

If you are allowed to select an approver before submitting an expense report, then you will be prompted to do so when you select **Submit**.
**Work with Receipts**

You can attach receipts to a report or to an individual expense.

1) On the **Report** screen or the **Expense Details** screen, tap **Add Receipt**.

2) On the menu, tap:
   - **Attach via Camera** to use your device camera
   - **Attach via Photo Album** to select an image in your device photos
   - **Receipt Store** to select an image in your Concur Receipt Store (Available Receipts library)
Approvals

Trips
If you are a trip approver, you can access the trips that require your approval.

1) On the home screen, tap Approvals.
2) On the Approvals screen, tap to open the desired trip.
3) On the Trip Approval screen:
   - Tap to view the report details (segments, violations, etc.).
   - Tap Approve or Reject.
Expense Reports
If you are an expense report approver, you can access the reports that require your approval.

1) On the home screen, tap Approvals.
2) On the Approvals screen, tap to open the desired expense report.
3) On the report screen:
   - Tap to view the report details (receipts, expenses, summary, etc.).
   - Tap Approve Report or Send Back.

NOTE: If you tap Send Back, you must provide a comment.

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, another menu appears.

Select one of these:
- Select Additional approver required to approve the report and send the report to the next approver in the workflow.
- Select Approve report to approve the report and send it directly to Accounting Review.
Requests (Concur Request)

If you are a request approver, you can access the requests that require your approval.

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

If you are a request approver, you can access the requests that require your approval.

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

If you are a request approver, you can access the requests that require your approval.

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

Use settings for the following:

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