Introduction to....... 
Concur's mobile app – iPhone®

You can use Concur on your smartphone to assist with your Expense, Travel, Invoice, and Request needs. Because you are using your smartphone, you can access your information in a cab, in a meeting, at the restaurant – where your laptop is not available or is too cumbersome. You can check your itinerary; book a flight, rental car, Amtrak, or hotel; get directions from your current location. You can enter out-of-pocket expenses real-time and take a picture of the associated receipt; create, submit, and check the status of your expense reports.

This guide provides brief "how to" steps. It assumes that the user already knows how to use the web version of Concur and already understands the concepts of Expense (expenses, itemizations, attendees, etc.), Travel (booking, rules, etc.), Invoice (payment requests, purchase requests, etc.), the approval process, and so on. It also assumes that the user is generally familiar with his/her mobile device.

This guide is available in DOC and PDF format. You can use the DOC as a starting point for your own training materials. Both are available in online Help (end user and admin) in the web version of Concur.
**Download**

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

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

**Log In**

Tap **Sign In** 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) Tap each segment to see the details.
**Book a Flight**

Depending on your configuration, you may be able to search for and book a flight.

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

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

- Or –

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

Then:

1) On the **Book Air** screen:
   - Tap **One Way** or **Round Trip**.
   - Enter the search criteria.
   - Tap **Search** (upper-right corner).

2) On the **Results Summary** screen, tap the desired carrier.

3) On the next screen, tap the desired flight.

4) On the **Flight Details** screen:
   - Review for accuracy.
   - Fill in the fields (if any) and make the desired selections.
   - Tap **Reserve** (upper-right corner).
**Book a Rental Car**

To access the Book Car menu option:

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

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

- 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 **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 **Book Room** screen:
   - Review for accuracy.
   - Fill in the fields (if any) and make the desired selections.
   - Tap **Reserve**.

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 Rail** menu option:

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

Then:

1) On the **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.

To access the menu:

- On the home screen, tap:
  - 📆 (lower-left corner) – or –
  - 🗓️ (upper-left corner) and then **Book Travel**
  - or –
- On the **Trips** screen, tap:
  - ✈️ **Book a Trip** – or –
  - 🏙️ (upper-right corner)
  - or –
- With an itinerary open, tap 📋 (upper-right corner).

Then:
1. On the menu, tap **Book Air** or **Book Hotel**, whichever applies.
2. On the bottom of the screen, tap the microphone.
3. Follow the instructions on the screen.
**Cancel a Hotel or Rental Car Reservation**

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

**View Agency Information**

You can access your agency information, such as hours, phone numbers, and website information.

1) On the home screen, tap **Trips**.
2) On the **Trips** screen, tap **Travel Agency Info**.
**Use Curb, Uber, and TripIt**

Depending on your company's configuration, Curb (formerly Taxi Magic), Uber, and TripIt may be available for download via the home screen.

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

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**Check-in with Locate & Alert**

If your company uses Concur's Locate & Alert service, you can check-in using your device.

1) On the home screen, tap (upper-left corner).
2) On the **Menu** screen, tap **Location Check In**.
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 (Reports Screen)**

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

You can open an existing expense report and:

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

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

To create a mobile expense:

- On the home screen, tap \[\text{expenses}\] (lower-right corner).
  \[\text{or}\]
  - On the home screen, tap \[\text{expenses}\] button, then on the Expenses screen, tap \[+\].

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

Delete an Expense from the Expenses Screen

You can delete a mobile expense from the Expenses screen.

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

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

You can create a new report:

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

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**.
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 expenses to an existing expense report or use them to create a new expense report.

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

**Create an Expense with an Open Expense Report**

1) On the home screen, tap **Expense Reports**.
2) On the **Active Reports** screen, tap to open the desired report.
3) On the **Report** screen, tap \(\uparrow\) or **Add Expense** to create a new expense.
4) On the **Add Expense** screen:
   - Choose the desired expense type.
   - Fill in the fields and make the desired selections.
   - Tap **Save**.
Add a Car Mileage (or Kilometer) Expense

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.
   - 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 Active Reports screen, tap to open the desired report.
2) On the Report screen, tap to open the desired expense.
3) On the Expense screen:
   - Make the desired changes.
   - Tap Save.
**Itemize an Expense**

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**. 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.
Add Attendees to an Expense

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:
   - Search from Contact to select from your smartphone contact list
   - Add Attendee Manually to manually add the attendee
   - Search for Attendee > Quick Search to search your Favorite Attendees
   - Search for Attendee > Advanced Search to search your company’s list of attendees or from an external source (like Salesforce)
**Attach Receipts**

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

1) On the Report screen or the Expense Details screen, tap Add Receipt.
2) On the menu, tap:
   - **Attach via Camera** to use your device camera
   - **Attach via Photo Album** to select an image in your device photos
   - **Receipt Store** to select an image in your Concur Receipt Store

**View Receipt Store Images**

You can easily view your images in the Receipt Store.

1) On the home screen, tap Expenses.
2) On the next page, tap Receipts.
3) Tap to open the desired image.
**Remove an Expense from an Expense Report**

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

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

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

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

**Edit Report Header Information**

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

1) On the **Report** screen, tap **Report Summary**.
2) On the **Report Summary** screen, make the desired changes.
3) Tap **Save**.
Submit an Expense Report

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 Active Reports screen, slide 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.
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.
**Expense Reports**

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

1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap to open the desired expense report.
3) On the **Report** screen:
   - View the report details (receipts, expenses, etc.).
   - Tap **Approve** or **Send Back**. 
   
   **NOTE:** If you tap **Send Back**, you must provide a comment.

**NOTE:** Depending on your configuration, you may be able to bypass any remaining approvers and send the expense report directly to Accounting Review. If so, when you select **Approve**, this menu appears. Tap:

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

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

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

1) On the home screen, tap Approvals.
2) On the Approvals screen, tap Travel 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 (Invoice)

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

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 payment 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 (Invoice)

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

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

Press the Concur icon in the device's apps list, the menu appears. Using the menu, you can 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.
Settings

Use settings for the following:
- Save your user name
- Automatically sign in
- Turn on Touch ID
- Send an error log to Concur
- Clear the cache
- Reset to the factory defaults
- Sign out