

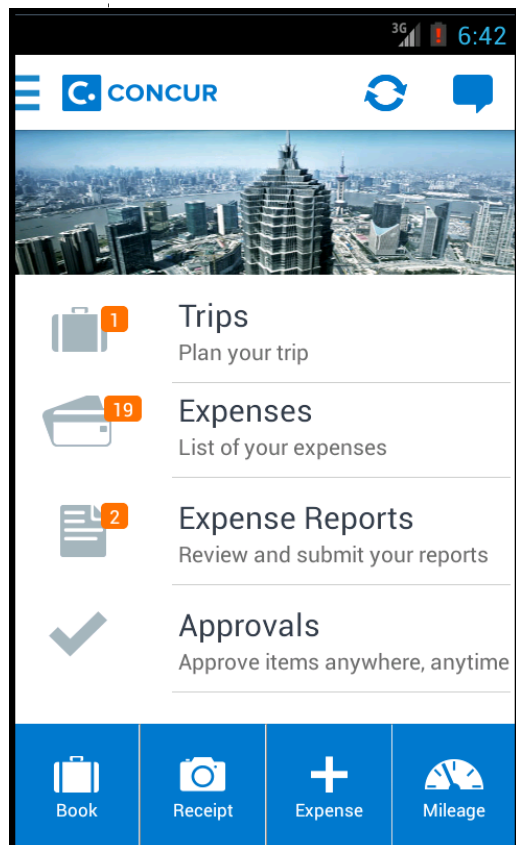
Introduction to.....

Concur for Mobile – Android™

Version 9.17.0 – December 30 2014





Applies to these Concur solutions:

- ☒ Expense in Travel & Expense
- ☒ Travel
- ☒ Travel in Travel & Expense
- ☒ Invoice
- ☒ Request



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

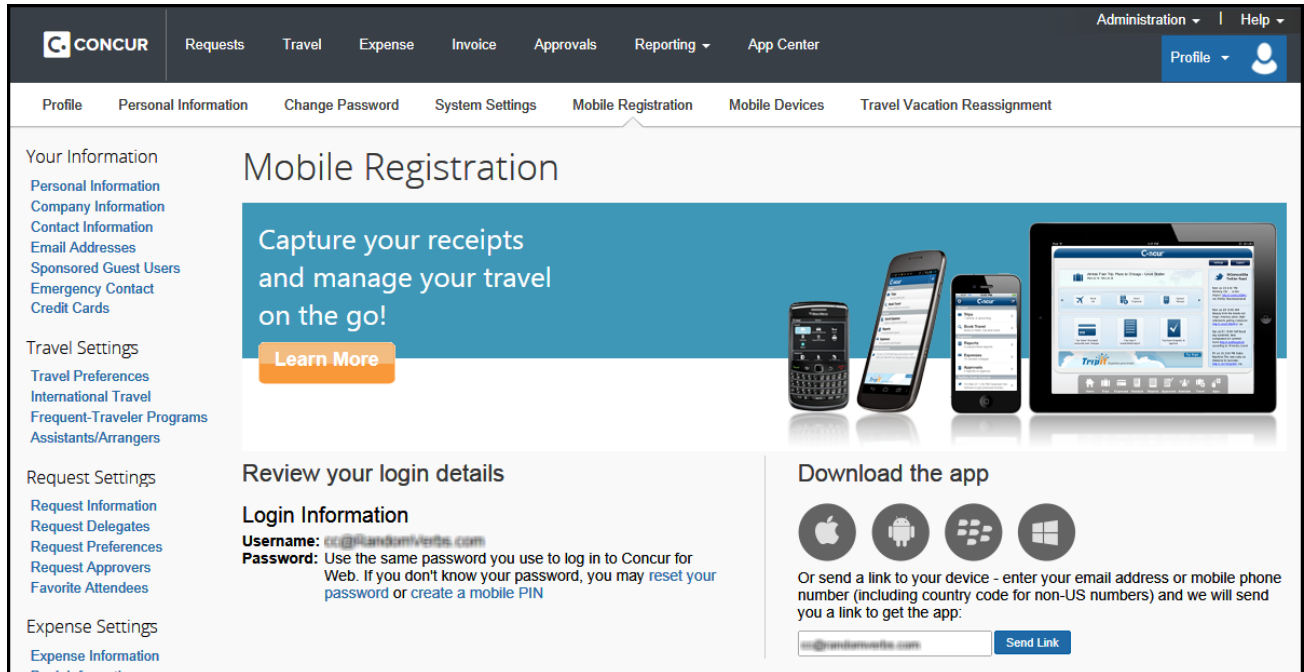
You can check your itinerary; book a flight, rental car, Amtrak, or hotel; get directions from your current location. You can enter out-of-pocket expenses real-time and take a picture of the associated receipt; create, submit, and check the status of your expense reports. If you are an approver, you can approve expense reports, requests, and payment requests (Invoice).

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Download

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


- You can download the app from Google Play 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.)

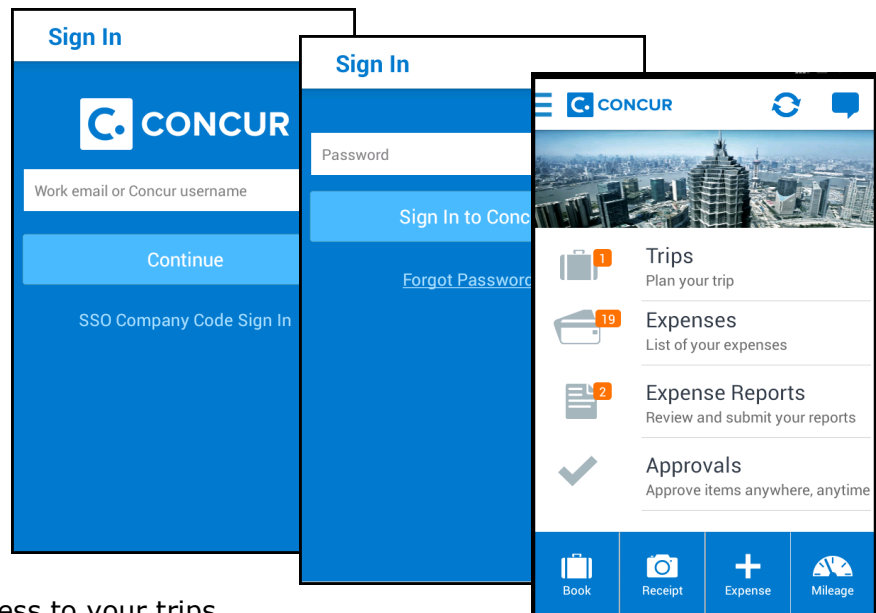


Log In

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  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

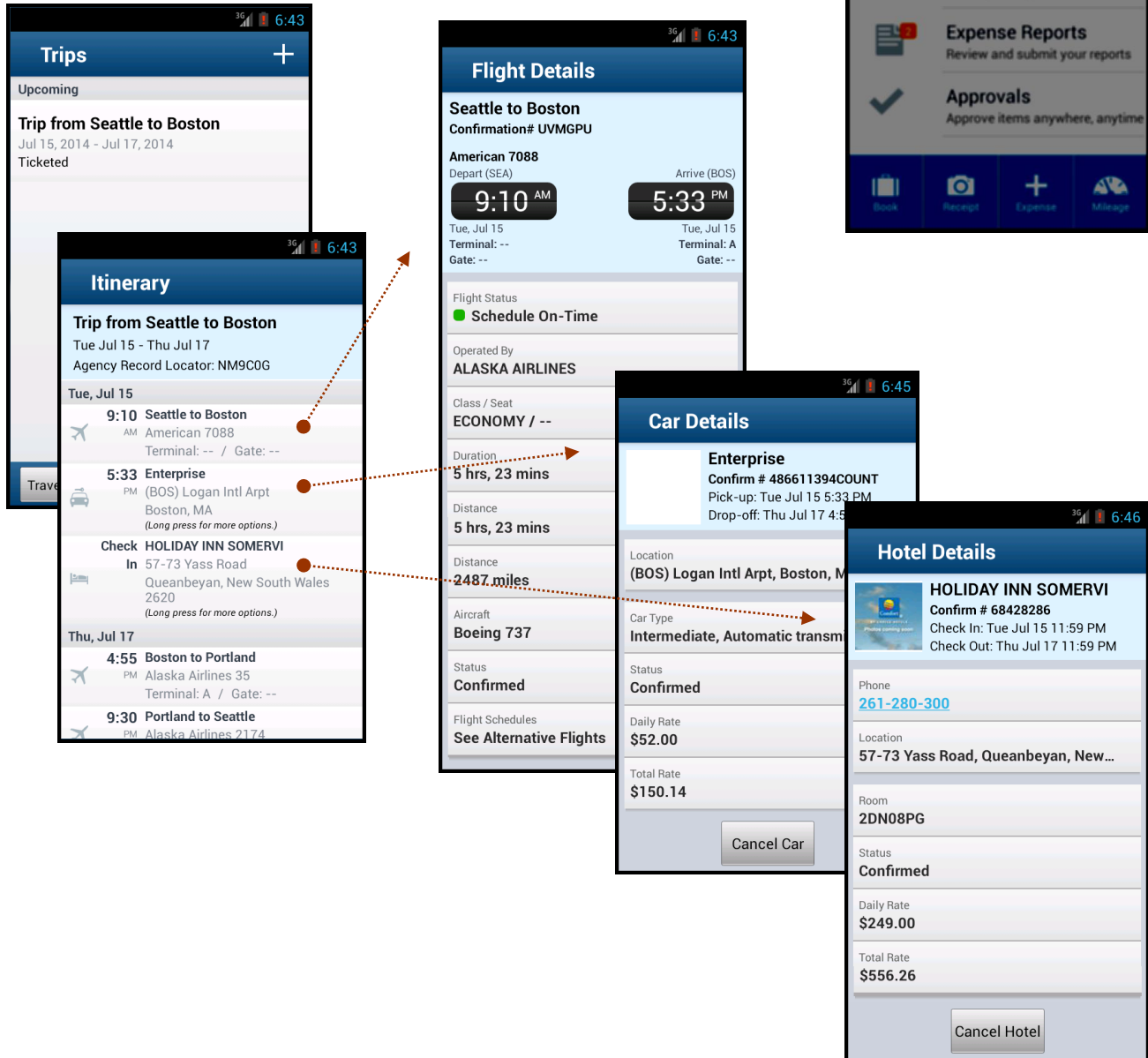
The options that appear on the home screen vary depending on the user's permissions. Users with the Travel Wizard User permission have access to the Travel-related features. Users with the Expense User permission have access to the Expense-related features. Approvers must have the proper approver role/permission.

Trips

View an Itinerary

If you have any trips, a counter **1** 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) On the **Itinerary** screen, tap each segment to see the details.



Trips

Upcoming

Trip from Seattle to Boston
Jul 15, 2014 - Jul 17, 2014
Ticketed

Itinerary

Trip from Seattle to Boston
Tue Jul 15 - Thu Jul 17
Agency Record Locator: NM9C0G

Tue, Jul 15

9:10 AM Seattle to Boston
American 7088
Terminal: -- / Gate: --

5:33 PM Enterprise
(BOS) Logan Intl Arpt
Boston, MA
(Long press for more options.)

Check In HOLIDAY INN SOMERVI
57-73 Yass Road
Queanbeyan, New South Wales
2620
(Long press for more options.)

Thu, Jul 17

4:55 PM Boston to Portland
Alaska Airlines 35
Terminal: A / Gate: --

9:30 PM Portland to Seattle
Alaska Airlines 2174

Flight Details

Seattle to Boston
Confirmation# UVMGPU

American 7088
Depart (SEA) **9:10 AM** Arrive (BOS) **5:33 PM**
Tue, Jul 15 Terminal: -- Gate: -- Tue, Jul 15 Terminal: A Gate: --

Flight Status
Schedule On-Time

Operated By
ALASKA AIRLINES

Class / Seat
ECONOMY / --

Duration
5 hrs, 23 mins

Distance
5 hrs, 23 mins

Distance
2487 miles

Aircraft
Boeing 737

Status
Confirmed

Flight Schedules
See Alternative Flights

Car Details

Enterprise
Confirm # 486611394COUNT
Pick-up: Tue Jul 15 5:33 PM
Drop-off: Thu Jul 17 4:55 PM

Location
(BOS) Logan Intl Arpt, Boston, MA

Car Type
Intermediate, Automatic trans

Status
Confirmed

Daily Rate
\$52.00

Total Rate
\$150.14

Cancel Car

Hotel Details

HOLIDAY INN SOMERVI
Confirm # 68428286
Check In: Tue Jul 15 11:59 PM
Check Out: Thu Jul 17 11:59 PM

Phone
261-280-300

Location
57-73 Yass Road, Queanbeyan, New...

Room
2DN08PG

Status
Confirmed

Daily Rate
\$249.00



Total Rate
\$556.26

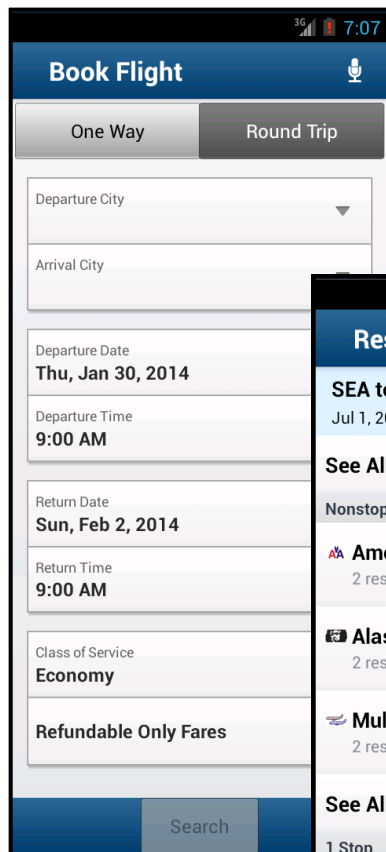
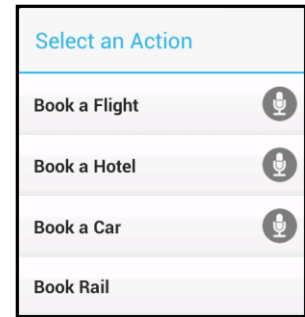
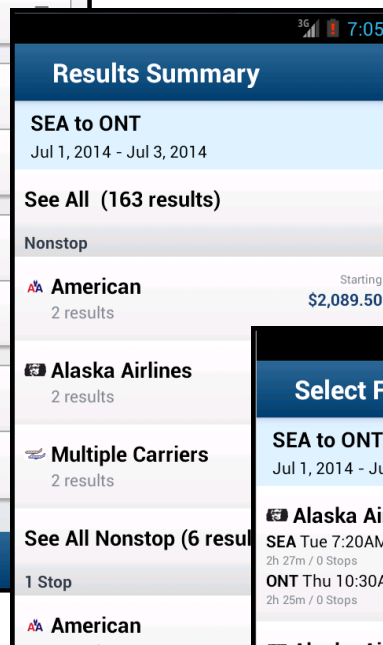
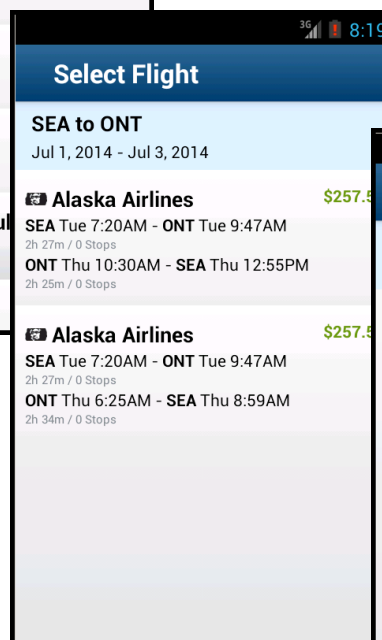
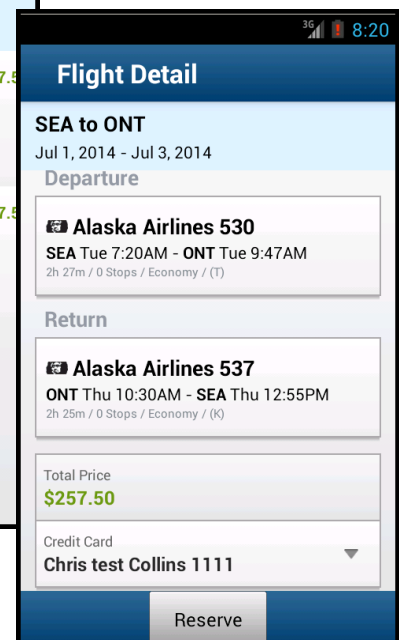
Cancel Hotel

Book a Flight

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

To search for and book a flight:




- On the home screen, tap  (lower-left corner) and then tap **Book a Flight** on the **Select an Action** menu.
– or –
- On the **Trips** screen, tap  (upper-right corner) and then tap **Book a Flight** on the **Select an Action** menu.

The "Book Flight" screen has a blue header with a microphone icon. Below the header are two tabs: "One Way" and "Round Trip". The form includes fields for "Departure City", "Arrival City", "Departure Date" (set to "Thu, Jan 30, 2014"), "Departure Time" (set to "9:00 AM"), "Return Date" (set to "Sun, Feb 2, 2014"), "Return Time" (set to "9:00 AM"), "Class of Service" (set to "Economy"), and "Refundable Only Fares". A "Search" button is at the bottom.The "Results Summary" screen has a blue header. It displays "SEA to ONT" for the period "Jul 1, 2014 - Jul 3, 2014". It shows "See All (163 results)" and "Nonstop" options. Under "Nonstop", it lists "American" with "2 results" and a starting price of "\$2,089.50". It also lists "Alaska Airlines" and "Multiple Carriers", each with "2 results". At the bottom, it shows "See All Nonstop (6 results)" and "1 Stop" options, with "American" listed under "1 Stop".The "Select Flight" screen has a blue header. It displays "SEA to ONT" for the period "Jul 1, 2014 - Jul 3, 2014". It lists "Alaska Airlines" with a price of "\$257.50". Below this, it shows two flight options: "SEA Tue 7:20AM - ONT Tue 9:47AM" (2h 27m / 0 Stops) and "ONT Thu 10:30AM - SEA Thu 12:55PM" (2h 25m / 0 Stops). It also lists "Alaska Airlines" with a price of "\$257.50" and another set of flight options: "SEA Tue 7:20AM - ONT Tue 9:47AM" (2h 27m / 0 Stops) and "ONT Thu 6:25AM - SEA Thu 8:59AM" (2h 34m / 0 Stops).The "Flight Detail" screen has a blue header. It displays "SEA to ONT" for the period "Jul 1, 2014 - Jul 3, 2014". It shows the "Departure" flight: "Alaska Airlines 530" from "SEA Tue 7:20AM - ONT Tue 9:47AM" (2h 27m / 0 Stops / Economy / (T)). It also shows the "Return" flight: "Alaska Airlines 537" from "ONT Thu 10:30AM - SEA Thu 12:55PM" (2h 25m / 0 Stops / Economy / (K)). The "Total Price" is "\$257.50". The "Credit Card" field shows "Chris test Collins 1111". A "Reserve" button is at the bottom.

- On the **Book Flight** screen:
 - Tap **One Way** or **Round Trip**.
 - Enter the search criteria.
 - Tap **Search**.
- On the **Results Summary** screen, tap the desired carrier.
- On the **Select Flight** screen, tap the desired flight.
- On the **Flight Detail** screen:
 - Review for accuracy.
 - Fill in the fields and make the desired selections.
 - Tap **Reserve**.

Book a Rental Car

To search for and book a rental car:

- On the home screen, tap  (lower-left corner) and then tap **Book a Car** on the **Select an Action** menu.
– or –
- On the **Trips** screen, tap  (upper-right corner) and then tap **Book a Car** on the **Select an Action** menu.
– or –
- To add a car to an existing itinerary, with the itinerary open, tap the menu  button and then tap **Add Car**.

Select an Action

- Book a Flight
- Book a Hotel
- Book a Car
- Book Rail

Add Car

Add Hotel

Refresh

Book Car

Location
Seattle Tacoma Intl Arpt,...

Pick-up Date
Tue, Jun 17, 2014

Pick-up Time
9:00 AM

Drop-off Date
Thu, Jun 19, 2014

Drop-off Time
5:00 PM

Car Type
Economy

Search

1) On the **Book Car** screen:

- Enter the search criteria.
- Tap **Search**.

2) On the **Car Choices** screen, tap the desired car.

3) On the **Car Details** screen:

- Review for accuracy.
- Fill in the fields and make the desired selections.
- Tap **Reserve**.

Car Choices

Seattle Tacoma Intl Arpt, Seattle,...

Tue Jun 17, 2014 - Thu Jun 19, 2014

Economy Car	Automatic transmission Air conditioning Unlimited Miles	\$45.00 per day
Economy Car	Automatic transmission Air conditioning Unlimited Miles	\$52.70 per day
Economy Car	Automatic transmission Air conditioning Unlimited Miles	\$56.87 per day
Economy Four Door Car	Automatic transmission Air conditioning Unlimited Miles	\$56.87 per day
Economy Car	Automatic transmission Air conditioning Unlimited Miles	\$61.75 per day

22 Results

Car Details

Thrifty

Pick Up: Tue Jun 17 9:00 AM
Drop Off: Thu Jun 19 5:00 PM

Credit Card
Chris L Collins 1111

Phone
206-246-7565

Location
SEATTLE-SEATAC APO SEA

Car Type
Economy Car, Automatic...




Daily Rate
\$56.87 per day

Reserve

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 search for and book a hotel:

- On the home screen, tap  (lower-left corner) and then tap **Book a Hotel** on the **Select an Action** menu.
– or –
- On the **Trips** screen, tap  (upper-right corner) and then tap **Book a Hotel** on the **Select an Action** menu.
– or –
- To add a hotel to an existing itinerary, with the itinerary open, tap the menu  button and then tap **Add Hotel**.

Select an Action

Book a Flight

Book a Hotel

Book a Car

Book Rail

Add Car

Add Hotel

Refresh

Book Hotel

Location
Select a location

Within
5 miles

Check-in
Tue, Jun 17, 2014

Check-out
Thu, Jun 19, 2014

With Names Containing

Search

Select Hotel

Hotels near Kelso, WA, USA
Tue Jun 17, 2014 - Thu Jun 19, 2014

Motel 6

106 Minor Rd.
Kelso, WA 98626 US
0.61 mi
(360) 425-3229
Not Preferred

Travelodge

838 15th Ave
Longview, WA 98632 US
1.87 mi
(360) 423-6460
Not Preferred

EconoLodge

505 N Pacific
Kelso, WA 98626 US
0.12 mi
(360) 636-4610
Not Preferred

10 of 10 results by Preferred Vendor

- On the **Book Hotel** screen:
 - Enter the search criteria.
 - Tap **Search**.
- On the **Select Hotel** screen, tap the desired hotel.
- On the **Select Room** screen, tap the desired room.
- On the **Book Room** screen:
 - Review for accuracy.
 - Fill in the fields and make the desired selections..
 - Tap **Reserve**.

Select Room

Travelodge

838 15th Ave
Longview, WA 98632 US
Press above for pictures.
Not Preferred

Stay 2 Save 15 Percent - 1 Queen Bed Non-smoking Room With Free Continental Breakfast Free

Stay 2 Save 15 Percent - 1 Queen Bed Smoking Room With Free Continental Breakfast Free Wi-fi

Book Now Save 15 Pct. 1 Queen Bed Non-smoking Room With Free Continental Breakfast Free

Book Now Save 15 Pct. 1 Queen Bed Smoking Room With Free Continental Breakfast Free Wi-fi

Stay 2 Save 15 Percent - 1 King Bed

15 Results

Book Room

Travelodge

838 15th Ave
Longview, WA 98632 US
Press above for pictures.
Not Preferred

Room Description
Stay 2 Save 15 Percent - 1 ...

Phone
(800) 578-7878

Location
838 15th Ave...

Check-in
Tue, Jun 17, 2014

Check-out
Thu, Jun 19, 2014

Room Rate
\$51.00

Credit Card
Chris L Collins 1111

Reserve

Tap here for images

Book Room

Holiday Inn Express Suites DFW Airport S



4235 W Airport Fwy
Irving, TX 75062 US
Chain Most Preferred

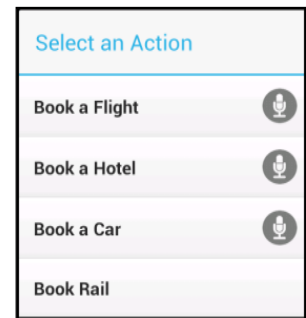
Tap here for amenities, cancellation info, etc.

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

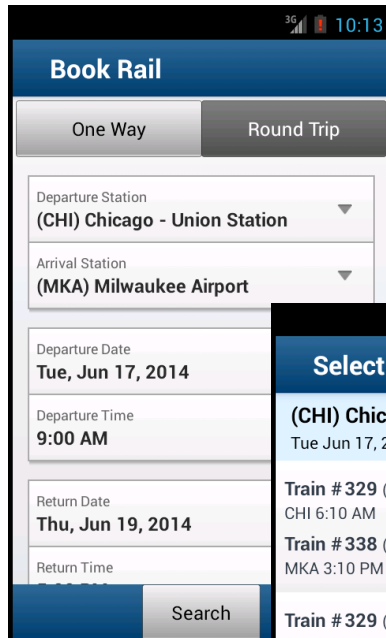
You can book rail if your company is configured to use Amtrak Direct Connect.

- On the home screen, tap  (lower left corner) and then tap **Book Rail** on the **Select an Action** menu.
– or –
- On the **Trips** screen, tap  (upper right corner) and then tap **Book Rail** on the **Select an Action** menu.



Select an Action

- Book a Flight
- Book a Hotel
- Book a Car
- Book Rail



Book Rail

One Way Round Trip

Departure Station
(CHI) Chicago - Union Station

Arrival Station
(MKA) Milwaukee Airport

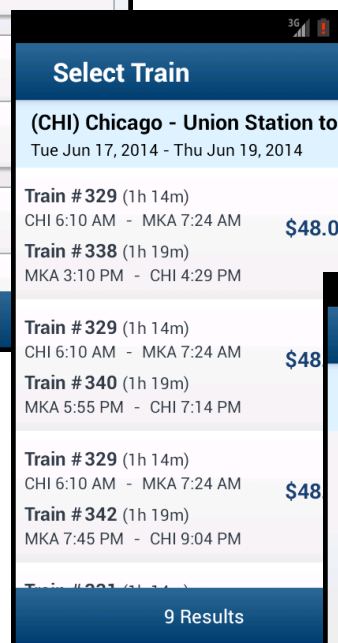
Departure Date
Tue, Jun 17, 2014

Departure Time
9:00 AM

Return Date
Thu, Jun 19, 2014

Return Time

Search



Select Train

(CHI) Chicago - Union Station to
Tue Jun 17, 2014 - Thu Jun 19, 2014

Train #329 (1h 14m)
CHI 6:10 AM - MKA 7:24 AM \$48.00

Train #338 (1h 19m)
MKA 3:10 PM - CHI 4:29 PM

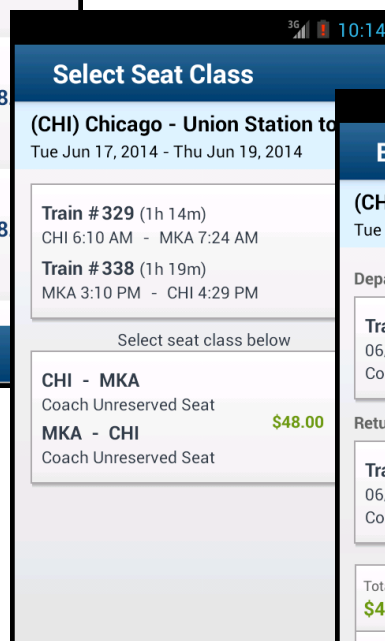
Train #329 (1h 14m)
CHI 6:10 AM - MKA 7:24 AM \$48.00

Train #340 (1h 19m)
MKA 5:55 PM - CHI 7:14 PM

Train #329 (1h 14m)
CHI 6:10 AM - MKA 7:24 AM \$48.00

Train #342 (1h 19m)
MKA 7:45 PM - CHI 9:04 PM

9 Results



Select Seat Class

(CHI) Chicago - Union Station to
Tue Jun 17, 2014 - Thu Jun 19, 2014

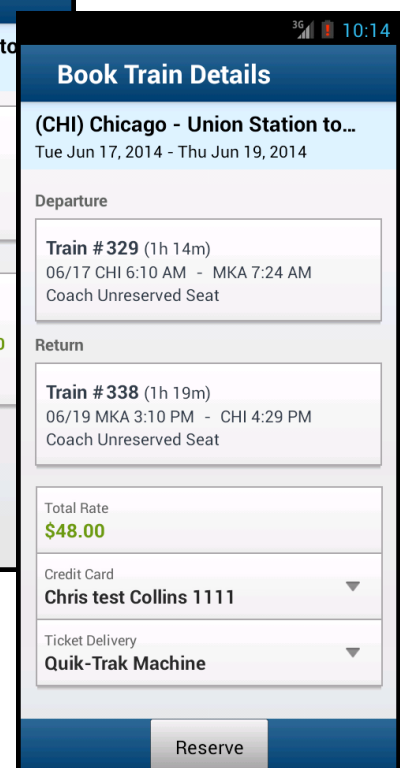
Train #329 (1h 14m)
CHI 6:10 AM - MKA 7:24 AM

Train #338 (1h 19m)
MKA 3:10 PM - CHI 4:29 PM

Select seat class below

CHI - MKA
Coach Unreserved Seat \$48.00

MKA - CHI
Coach Unreserved Seat



Book Train Details

(CHI) Chicago - Union Station to...
Tue Jun 17, 2014 - Thu Jun 19, 2014

Departure

Train #329 (1h 14m)
06/17 CHI 6:10 AM - MKA 7:24 AM
Coach Unreserved Seat

Return

Train #338 (1h 19m)
06/19 MKA 3:10 PM - CHI 4:29 PM
Coach Unreserved Seat

Total Rate
\$48.00

Credit Card
Chris test Collins 1111

Ticket Delivery
Quik-Trak Machine

Reserve

1) On the **Book Rail** screen:

- Tap **One Way** or **Round Trip**.
- Enter the search criteria.
- Tap **Search**.

2) On the **Select Train** screen, tap the desired trip.

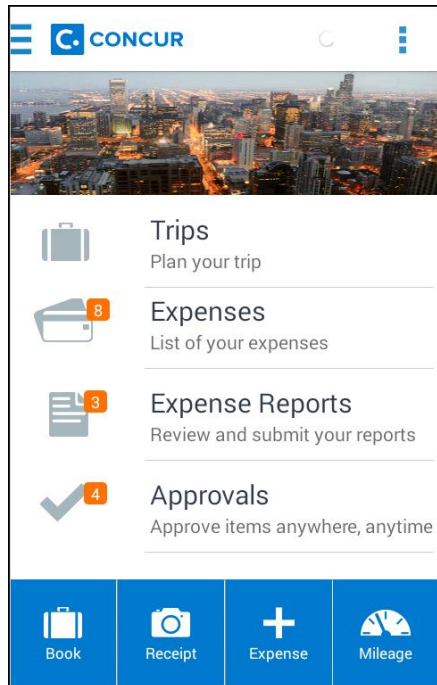
3) On the **Select Seat Class** screen, tap the desired seat.

4) On the **Book Train Details** screen:



- Review for accuracy.
- Fill in the fields and make the desired selections.
- Tap **Reserve**.


Book a Flight, Hotel, or Car Using Voice

You can book a flight, hotel, or car using voice.

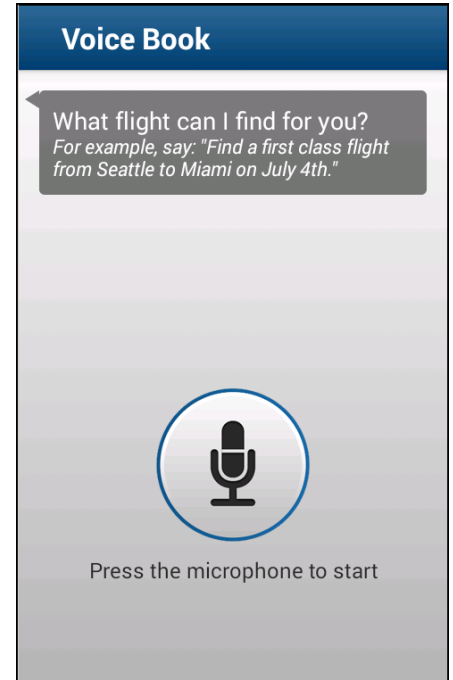
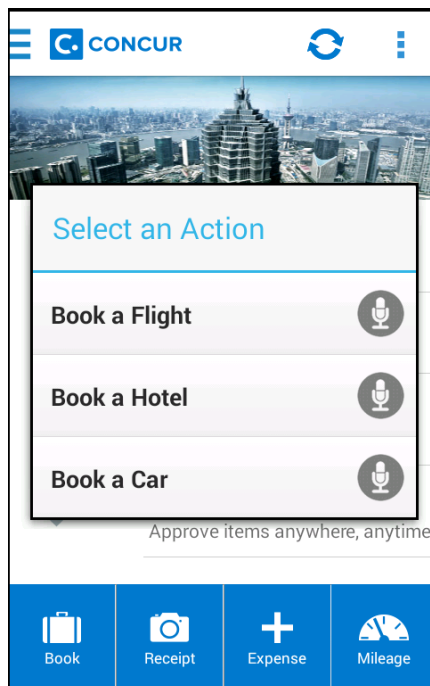


1) Either:

- On the home screen, tap  (lower left corner) to access the **Select an Action** menu.
– or –
- On the **Trips** screen, tap  (upper right corner) to access the **Select an Action** menu.

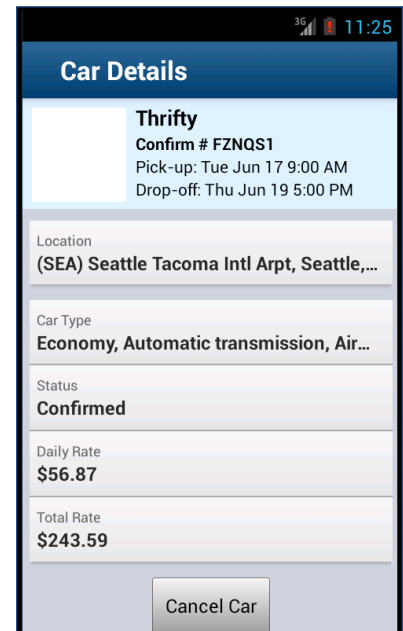
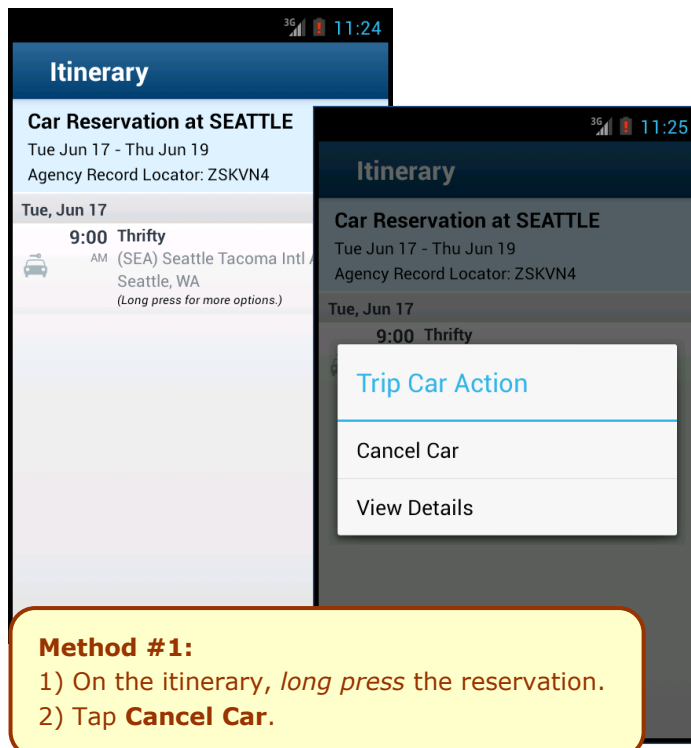
2) On the **Select an Action** menu, tap .

3) On the **Voice Book** screen, tap the microphone to start.



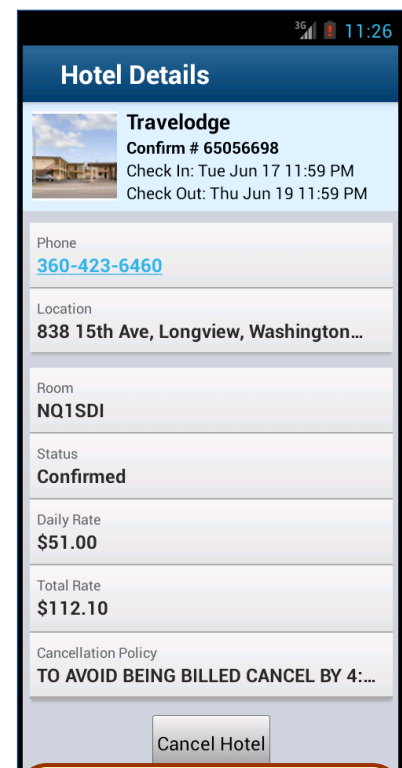
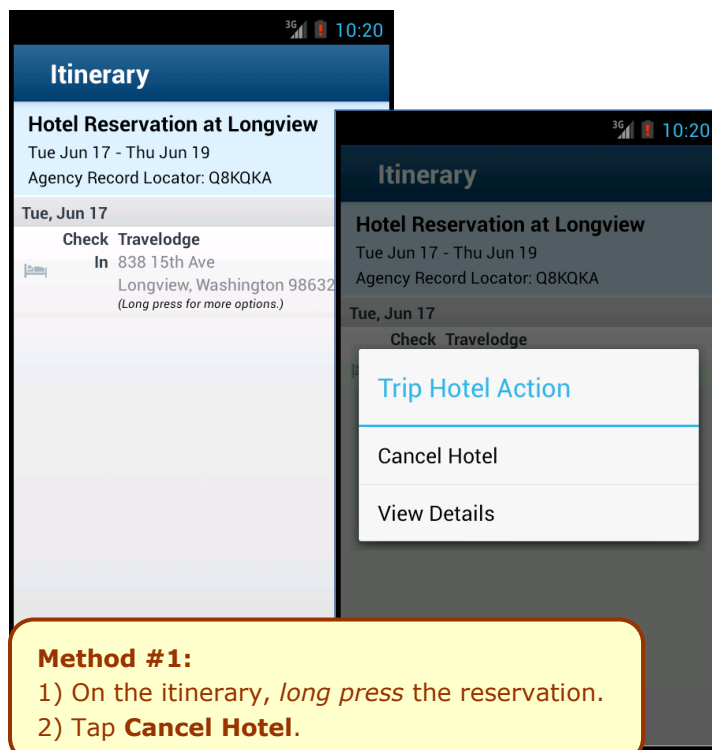
Cancel a Rental Car Reservation

There are two ways to cancel a car reservation on an itinerary.



Cancel a Hotel Reservation

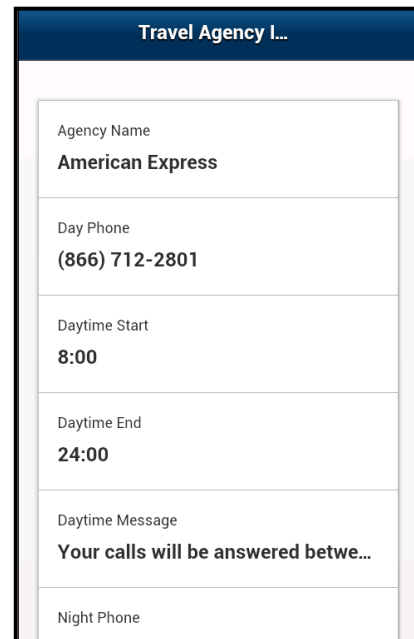
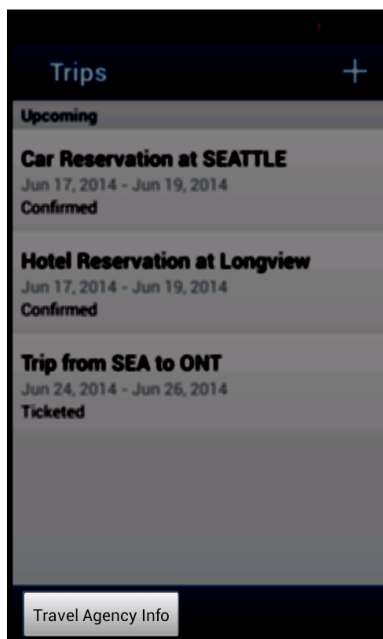
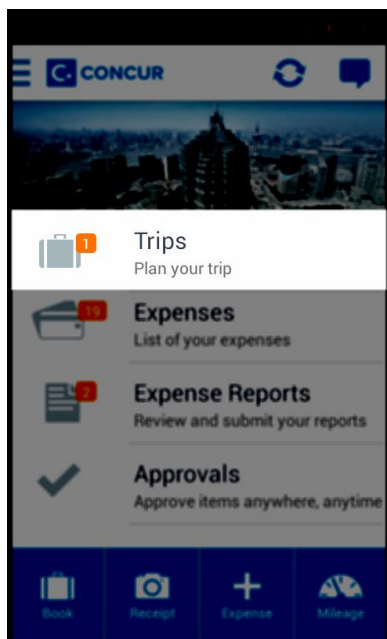
There are two ways to cancel a hotel reservation on an itinerary.



View Agency Information


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

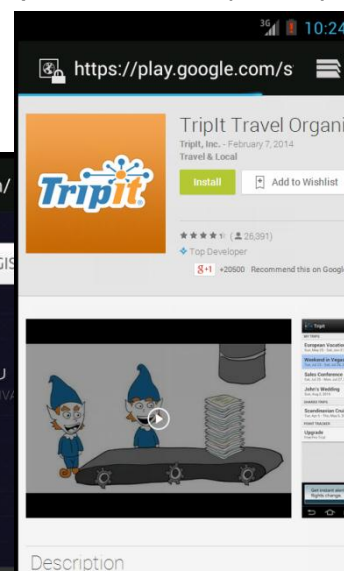
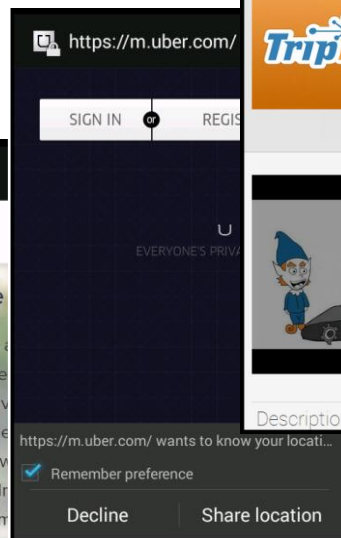
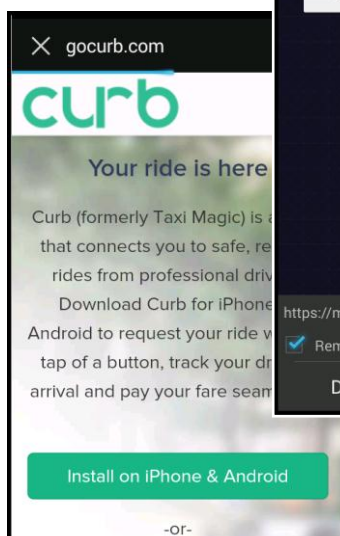
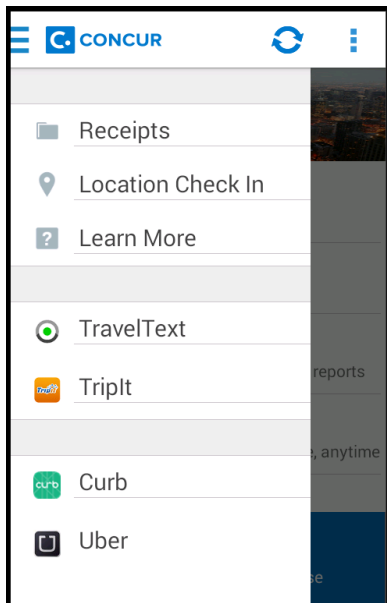
- 1) On the home screen, tap **Trips**.
- 2) On the **Trips** screen, tap **Travel Agency Info**.



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. 
- 2) Tap the desired option and download.

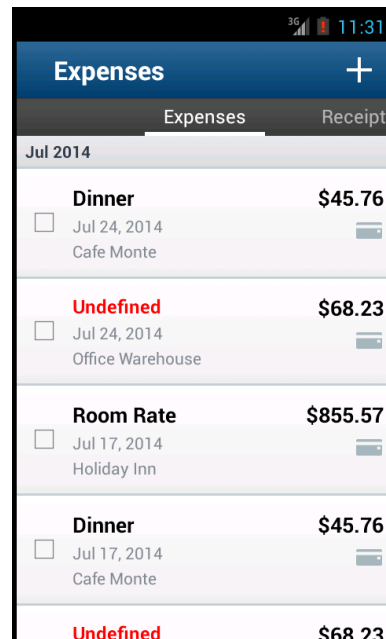


Expenses and Expense Reports

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  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.



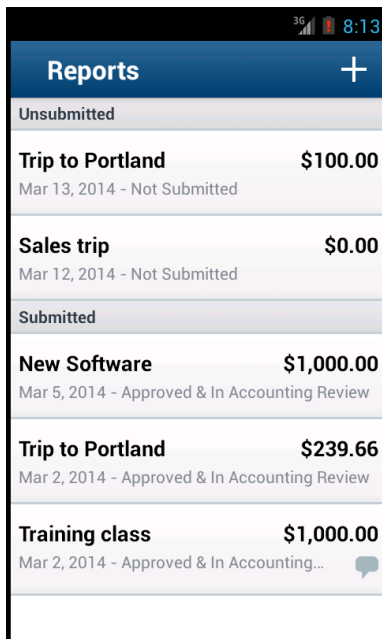
Expenses		+
Expenses		Receipt
Jul 2014		
Dinner	\$45.76	
<input type="checkbox"/> Jul 24, 2014		
Cafe Monte		
Undefined	\$68.23	
<input type="checkbox"/> Jul 24, 2014		
Office Warehouse		
Room Rate	\$855.57	
<input type="checkbox"/> Jul 17, 2014		
Holiday Inn		
Dinner	\$45.76	
<input type="checkbox"/> Jul 17, 2014		
Cafe Monte		
Undefined	\$68.23	

Expense Report List (Reports Screen)

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

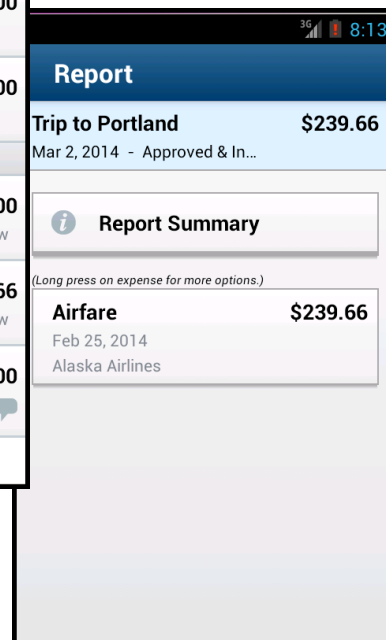
You can open an existing expense report and:

- 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



Reports		+
Unsubmitted		
Trip to Portland	\$100.00	
Mar 13, 2014 - Not Submitted		
Sales trip	\$0.00	
Mar 12, 2014 - Not Submitted		
Submitted		
New Software	\$1,000.00	
Mar 5, 2014 - Approved & In Accounting Review		
Trip to Portland	\$239.66	
Mar 2, 2014 - Approved & In Accounting Review		
Training class	\$1,000.00	
Mar 2, 2014 - Approved & In Accounting...		




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




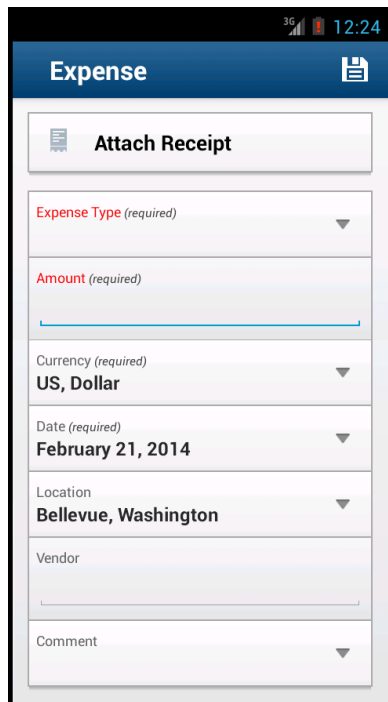
Report	
Trip to Portland	\$239.66
Mar 2, 2014 - Approved & In...	
Report Summary	
(Long press on expense for more options.)	
Airfare	\$239.66
Feb 25, 2014	
Alaska Airlines	

Create a Mobile Expense

To create a *mobile* expense:

- On the home screen, tap .
– or –
- On the home screen, tap  Expenses
List of your expenses
– or –
- On the **Expenses** screen, tap .

- 1) On the **Expense** screen, fill in the fields and make the desired selections.
- 2) Tap **Attach Receipt** to take a picture of the receipt, if required.
- 3) Tap  to save.



Expense

Attach Receipt

Expense Type (required) ▼

Amount (required)

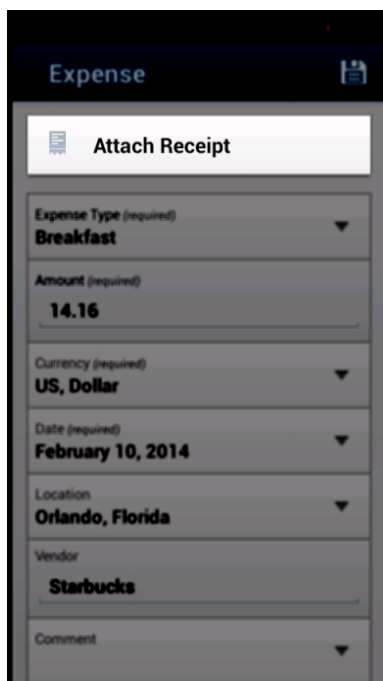
Currency (required)
US, Dollar ▼

Date (required)
February 21, 2014 ▼

Location
Bellevue, Washington ▼

Vendor

Comment
_____ ▼



Expense

Attach Receipt

Expense Type (required)
Breakfast ▼

Amount (required)
14.16

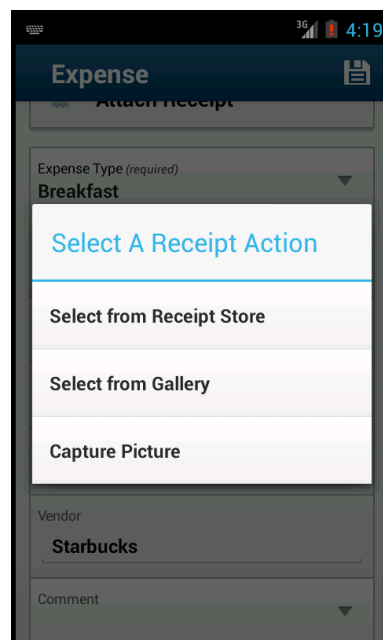
Currency (required)
US, Dollar ▼

Date (required)
February 10, 2014 ▼

Location
Orlando, Florida ▼

Vendor
Starbucks ▼

Comment
_____ ▼



Expense

Attach Receipt

Expense Type (required)
Breakfast ▼

Select A Receipt Action

Select from Receipt Store

Select from Gallery

Capture Picture


Vendor
Starbucks ▼

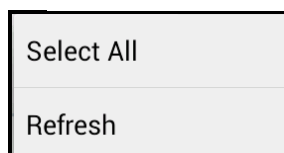
Comment
_____ ▼

Delete an Expense from the Expenses Screen

You can delete a *mobile* expense from the **Expenses** screen.

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

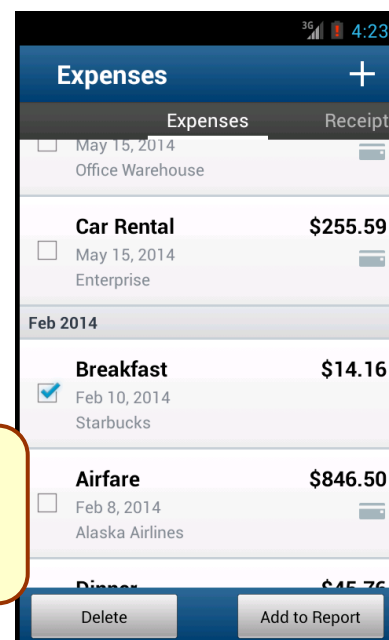
To refresh the list, tap the menu  button. Then...



Select All

Refresh

- 1) On the **Expenses** screen, tap one or more check boxes.
- 2) Tap **Delete**.



Expenses

Expenses Receipt

☐ May 15, 2014
Office Warehouse

Car Rental \$255.59

☐ May 15, 2014
Enterprise

Feb 2014

☒ **Breakfast** \$14.16
Feb 10, 2014
Starbucks

☐ **Airfare** \$846.50
Feb 8, 2014
Alaska Airlines

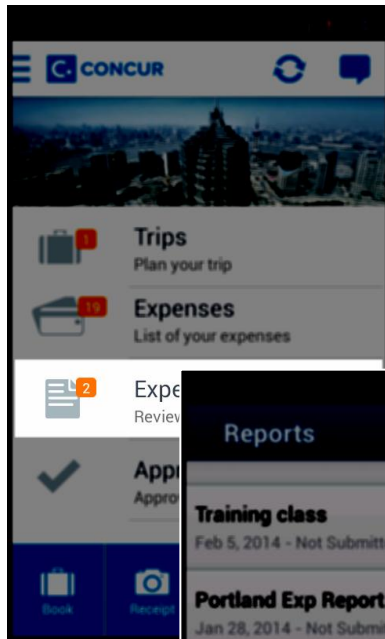
Dinner \$45.76


Delete Add to Report

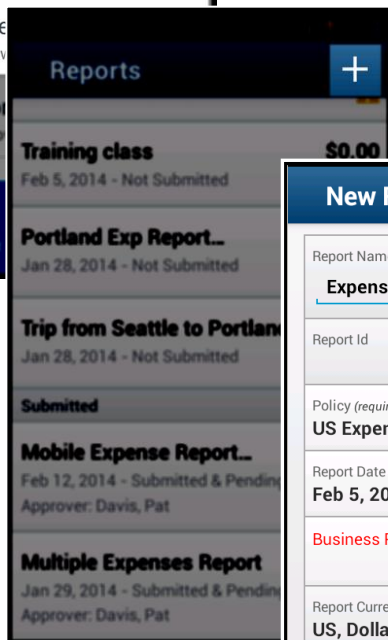
Create a New Expense Report

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 **Reports** screen, tap **+**.
- 3) On the **New Report** screen:
 - Concur provides a report name. Change it if desired.
 - Fill in the fields and make the desired selections.
 - Tap  to save.
- 4) On the **Report** screen, enter your expenses, attach receipts, etc. (described on the following pages).

A screenshot of the 'New Report' form in the Concur mobile app. The form contains the following fields: 'Report Name (required)' with the text 'Expenses for January 2014', 'Report Id', 'Policy (required)' with a dropdown menu showing 'US Expense Policy', 'Report Date' with a dropdown menu showing 'Feb 5, 2014', 'Business Purpose (required)' with a dropdown menu, 'Report Currency' with a dropdown menu showing 'US, Dollar', 'Approval Status' with a dropdown menu showing 'Not Submitted', and a 'Comment' field.A screenshot of the 'Report' screen in the Concur mobile app. The screen shows the report title 'Expenses for January 2014' and the amount '\$0.00'. Below this, there are two sections: 'Report Summary' and 'Receipts'. The 'Report Summary' section shows 'No Expenses' and an 'Add Expenses' button. The 'Receipts' section is currently empty.

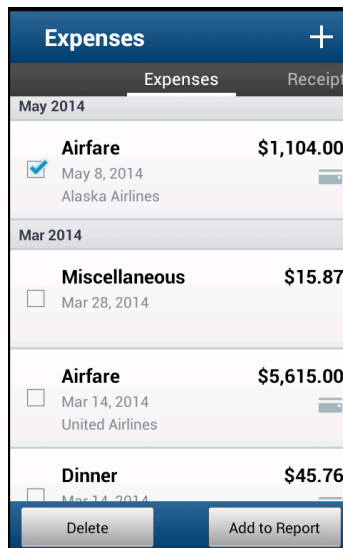
Move Expenses from the Expenses Screen to an Expense Report

You can move expenses to a new expense report or an existing expense report.

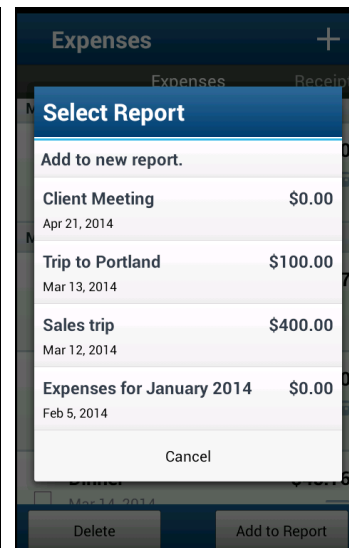
- 1) On the **Expenses** screen, tap one or more check boxes.
- 2) Tap **Add to Report**.
- 3) On the **Select Report** screen, either tap the desired expense report or tap **Add to new report**.

To refresh the list, tap the menu  button. Then...

Select All
Refresh





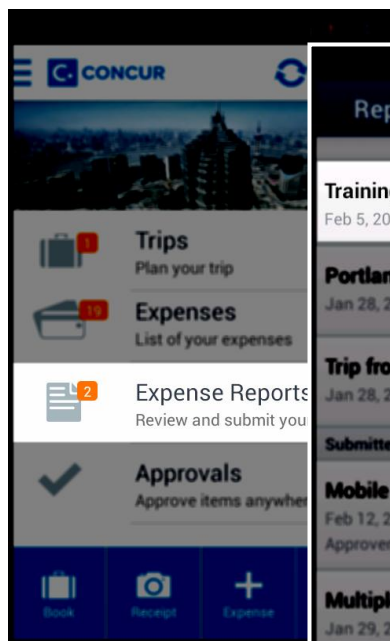
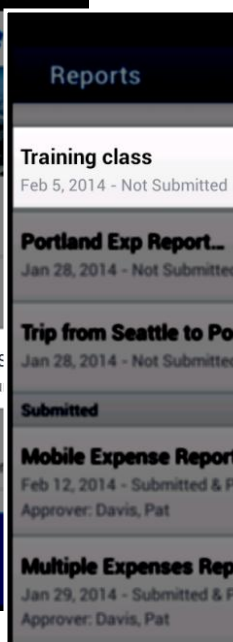
Expenses	
May 2014	
<input checked="" type="checkbox"/> Airfare \$1,104.00	May 8, 2014 Alaska Airlines
Mar 2014	
<input type="checkbox"/> Miscellaneous \$15.87	Mar 28, 2014
<input type="checkbox"/> Airfare \$5,615.00	Mar 14, 2014 United Airlines
<input type="checkbox"/> Dinner \$45.76	Mar 14, 2014



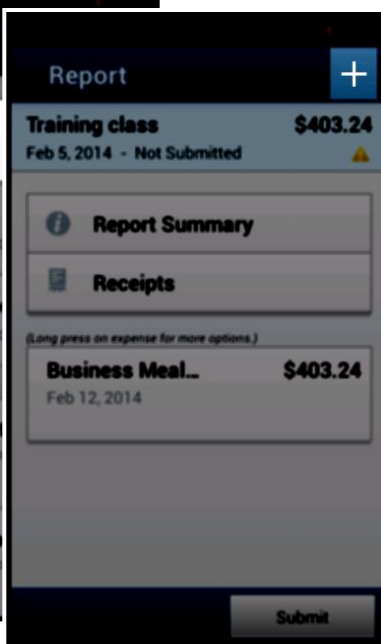
Select Report	
Add to new report.	
Client Meeting \$0.00	Apr 21, 2014
Trip to Portland \$100.00	Mar 13, 2014
Sales trip \$400.00	Mar 12, 2014
Expenses for January 2014 \$0.00	Feb 5, 2014
Cancel	

Create an Expense with an Open Expense Report

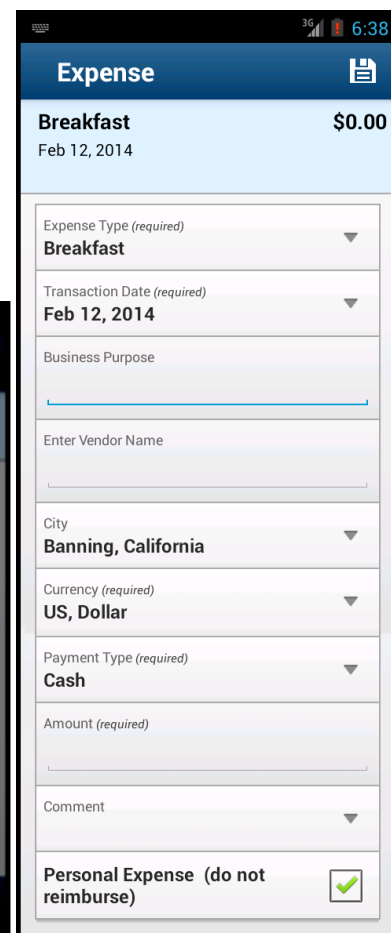
- 1) On the home screen, tap **Expense Reports**.
- 2) On the **Reports** screen, tap to open the desired report.
- 3) On the **Report** screen, tap  to create a new expense.
- 4) On the **Expense** screen:
 - Choose the desired expense type.
 - Fill in the fields and make the desired selections.
 - Tap  to save.

Reports	
Training class	Feb 5, 2014 - Not Submitted
Portland Exp Report...	Jan 28, 2014 - Not Submitted
Trip from Seattle to Po	Jan 28, 2014 - Not Submitted
Submitted	
Mobile Expense Report	Feb 12, 2014 - Submitted & P
Approver: Davis, Pat	
Multiple Expenses Rep	Jan 29, 2014 - Submitted & P
Approver: Davis, Pat	





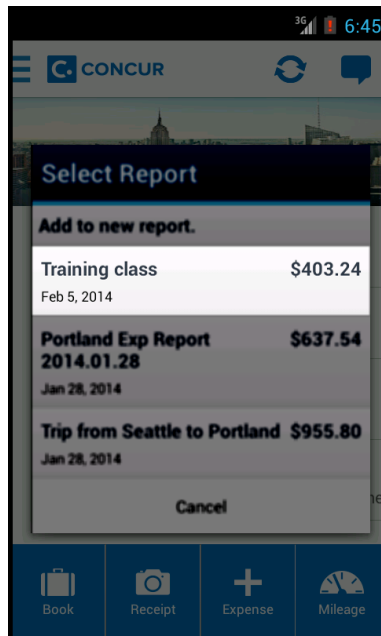
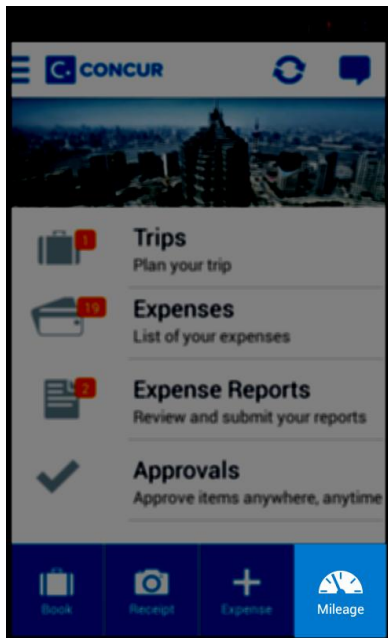
Report	
Training class	\$403.24
Feb 5, 2014 - Not Submitted	
Report Summary	
Receipts	
(Long press on an expense for more options.)	
Business Meal...	\$403.24
Feb 12, 2014	
Submit	



Expense	
Breakfast	\$0.00
Feb 12, 2014	
Expense Type (required)	
Breakfast	
Transaction Date (required)	
Feb 12, 2014	
Business Purpose	
Enter Vendor Name	
City	
Banning, California	
Currency (required)	
US, Dollar	
Payment Type (required)	
Cash	
Amount (required)	
Comment	
Personal Expense (do not reimburse)	
<input checked="" type="checkbox"/>	

Add a Car Mileage (or Kilometer) Expense


- 1) On the home screen, tap .
- 2) On the **Select Report** screen, either tap the desired expense report or tap **Add to new report**.
- 3) On the **Mileage Expense** 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  to save.



Edit an Expense on an Expense Report

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

Reports +	
Unsubmitted	
Client Meeting	\$1,104.00
Apr 21, 2014 - Not Submitted	
Trip to Portland	\$100.00
Mar 13, 2014 - Not Submitted	
Sales trip	\$400.00
Mar 12, 2014 - Not Submitted	
Expenses for January 2014	\$0.00
Feb 5, 2014 - Not Submitted	
Submitted	
New Software	\$1,000.00
Mar 5, 2014 - Approved & In Accounting Review	
Trip to Portland	\$239.66

- 1) On the **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  to save.

Itemize an Expense

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

1) On the report, tap to open the desired expense.

2) On the **Expense** screen, tap **Itemization**.

3) On the **Itemization** screen:

- Enter the daily room rate and daily tax rate.
- Tap to save. The individual itemizations appear.

If there is a remaining balance, tap and repeat these steps (including) until the remaining amount balance is zero.

Itemization

Room Rate \$376.29
Feb 24, 2014
Holiday Inn

Itemizations are required entry.

Expense Type (required)
Room Rate

Transaction Date (required)
Feb 24, 2014

Business Purpose
room while training

Itemization

Room Rate \$376.29
Feb 24, 2014
Holiday Inn

Nights

Check-in Date (required)
Feb 22, 2014

Check-out Date (required)
Feb 24, 2014

Number of Nights (<= 90) (required)
2

Recurring Charges (each night)

Room Rate (required)
125.00

Room Tax
17.50

Combine room rate and taxes into one entry ☐

Recurring Charges (each night)

Expense Type

Itemization

(Long press on expense for more options.)

Room Rate \$125.00
Feb 23, 2014
Holiday Inn

Room Tax \$17.50
Feb 23, 2014
Holiday Inn

Room Rate \$125.00
Feb 22, 2014
Holiday Inn

Room Tax \$17.50
Feb 22, 2014
Holiday Inn

Itemized Amount: \$285.00
Remaining: \$91.29

Itemization

(Long press on expense for more options.)

Business Meal... \$91.29
Feb 24, 2014
Holiday Inn

Room Rate \$125.00
Feb 23, 2014
Holiday Inn

Room Tax \$17.50
Feb 23, 2014
Holiday Inn

Room Rate \$125.00
Feb 22, 2014
Holiday Inn

Room Tax \$17.50
Feb 22, 2014
Holiday Inn

Itemized Amount: \$376.29
Remaining: \$0.00

Itemization

Business Meal (attendees) \$91.29
Feb 24, 2014
Holiday Inn

Attendees (0)

Expense Type (required)
Business Meal (attendees)

Transaction Date (required)
Feb 24, 2014

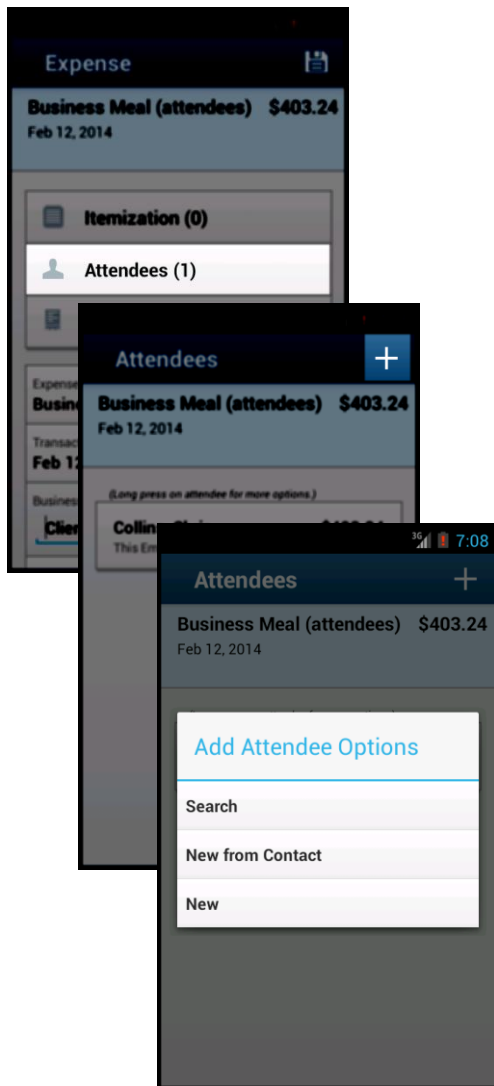
Business Purpose

Enter Vendor Name
Holiday Inn

City
Portland, Oregon

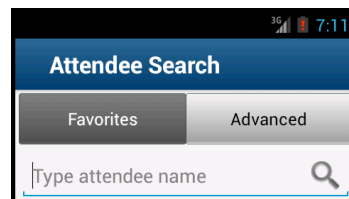
Add Attendees to an Expense

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

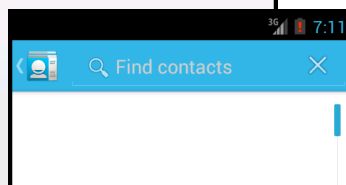


- 1) On the report, tap to open the desired expense.
- 2) On the **Expense** screen, tap **Attendees**.
- 3) On the **Attendees** screen, tap **+** to add.
- 4) On the **Add Attendee Options** menu, tap one of the following:

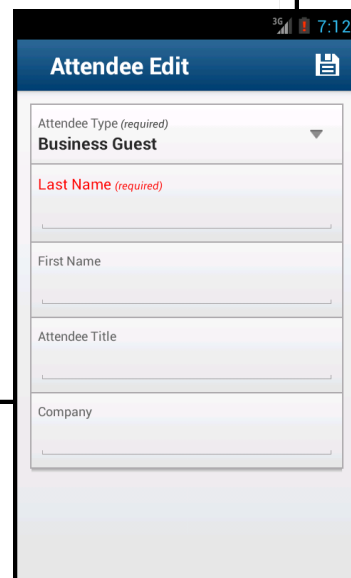
- **Search > Advanced** to search your company's list of attendees or from an external source (like Salesforce)
- **Search > Favorites** to search your Favorite Attendees
- **New from Contact** to select from your smartphone contact list
- **New** to manually add the attendee



Search > Favorites
Search > Advanced



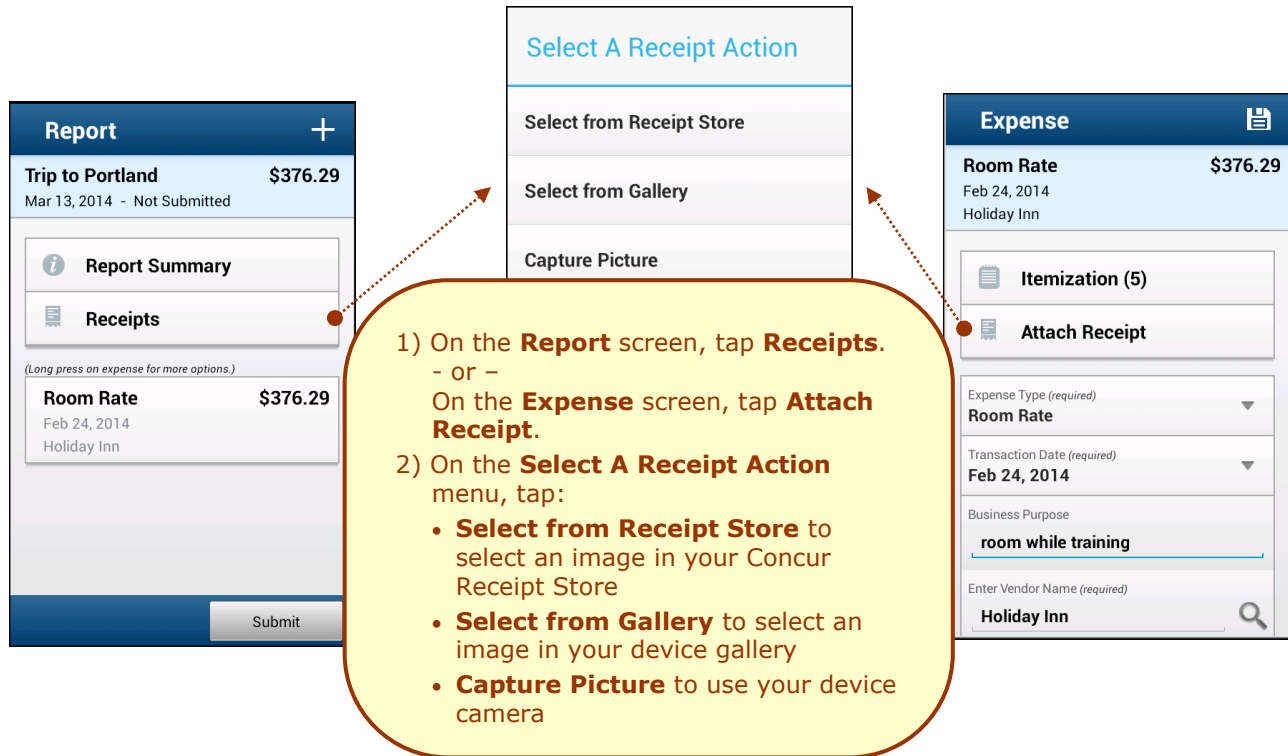
New from Contact



New

Work with Receipts

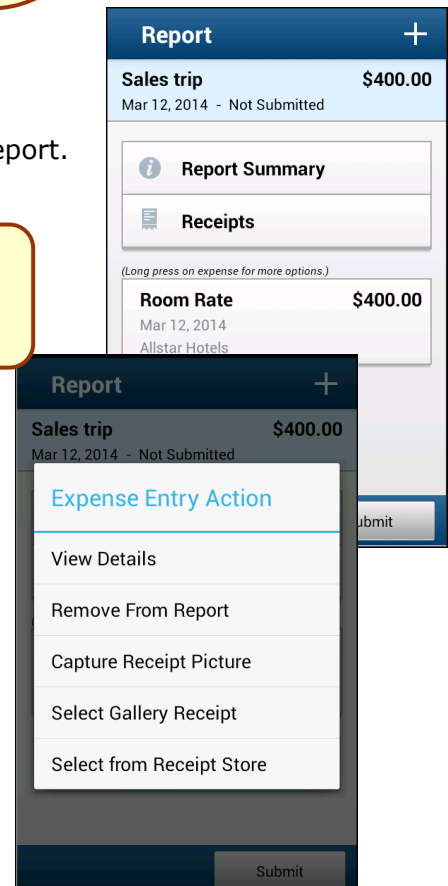
Attach a receipt to a report or to an individual expense, whichever the situation requires.



Remove an Expense from an Expense Report

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

- 1) Long press on the desired expense.
- 2) On the **Expense Entry Action** menu, tap **Remove From Report**.




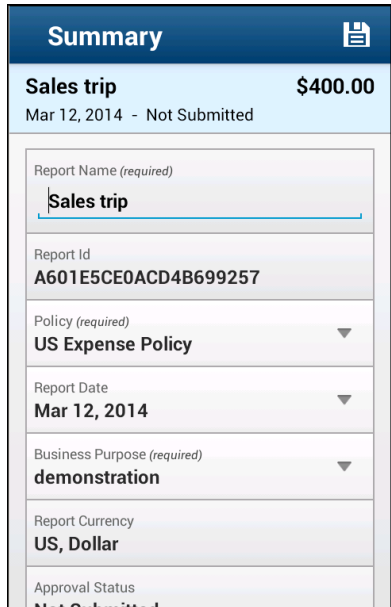
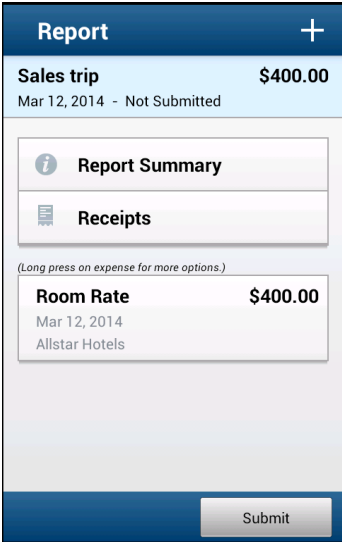
NOTE: If you delete a *mobile* expense or an expense created from a card transaction, it is not really deleted; it is moved back to the "pool" of expenses on the **Expenses** screen.

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

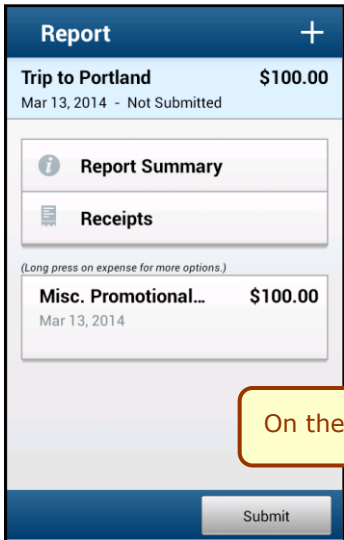
Edit Report Header Information

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 **Summary** screen, make the desired changes.
- 3) Tap  to save.



Submit an Expense Report

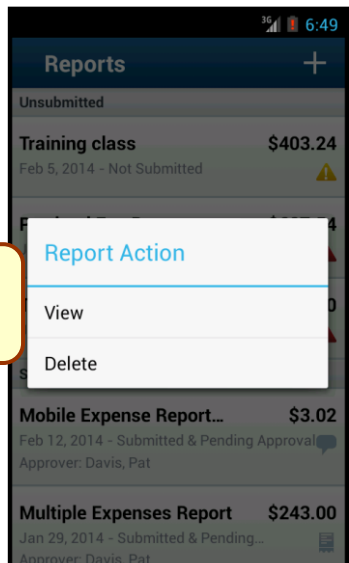


On the **Report** screen, tap **Submit**.

Delete an Unsubmitted Expense Report

- 1) On the **Reports** screen, long press on a report name.
- 2) On the **Report Action** menu, tap **Delete**.

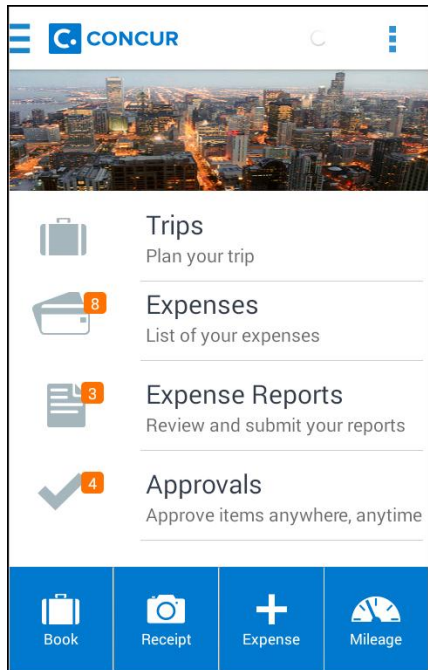
NOTE: Expenses on the report that are related to card transactions are not really deleted – they are returned to the "pool" of card transactions. Cash transactions are truly deleted.



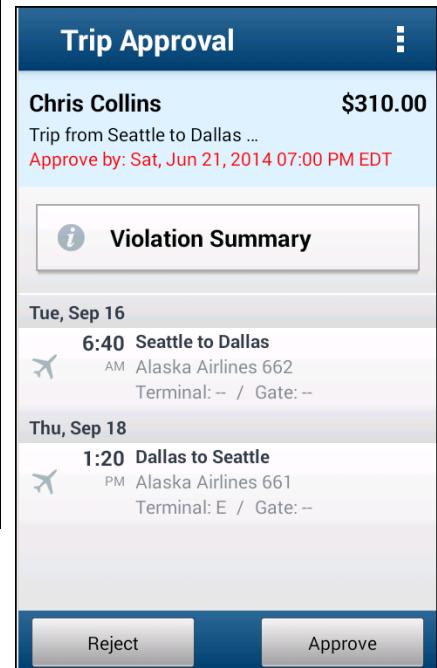
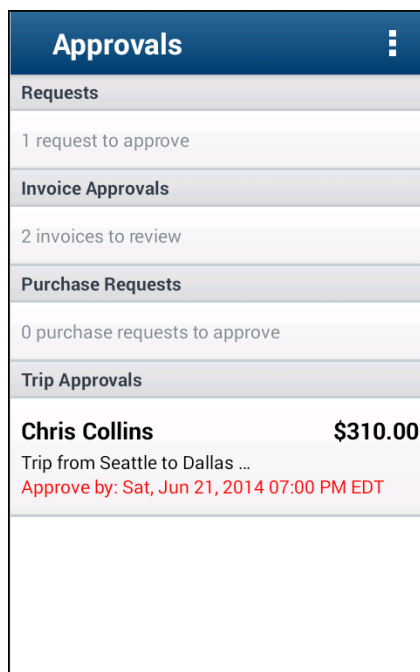
✓ Approvals

Trips

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

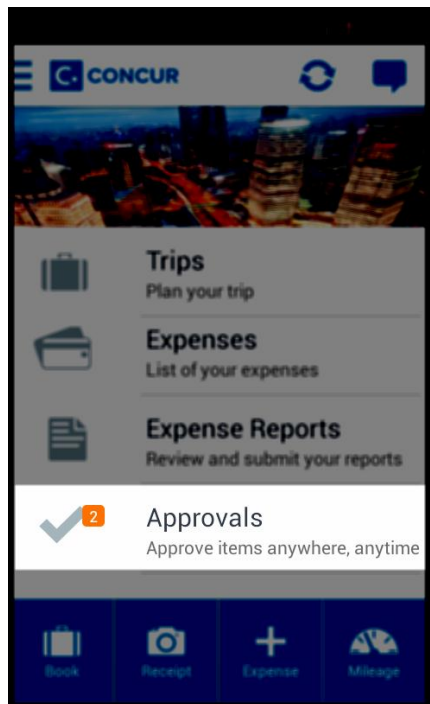


- 1) On the home screen, tap **Approvals**.
- 2) On the **Approvals** screen, tap to open the desired trip.
- 3) On the **Trip Approval** screen:
 - View the report details (segments, violations, etc.).
 - Tap **Approve** or **Reject**.

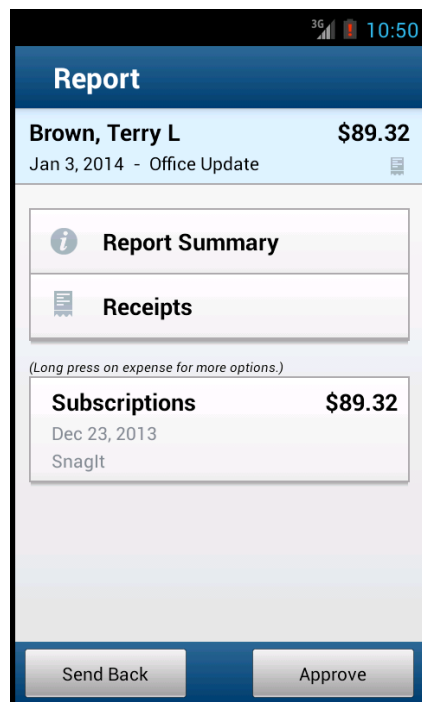
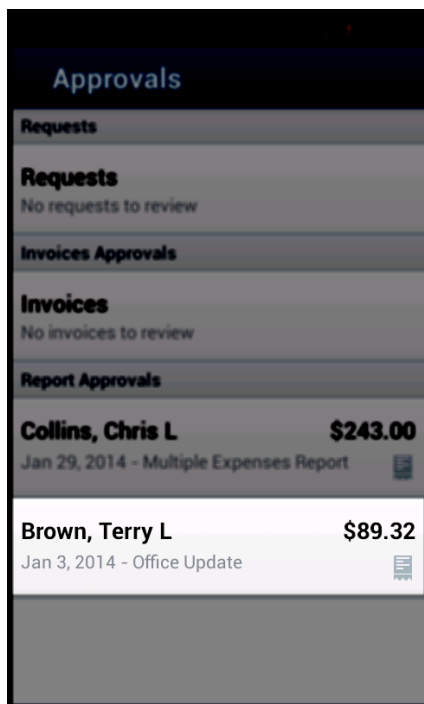


Expense Reports

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:

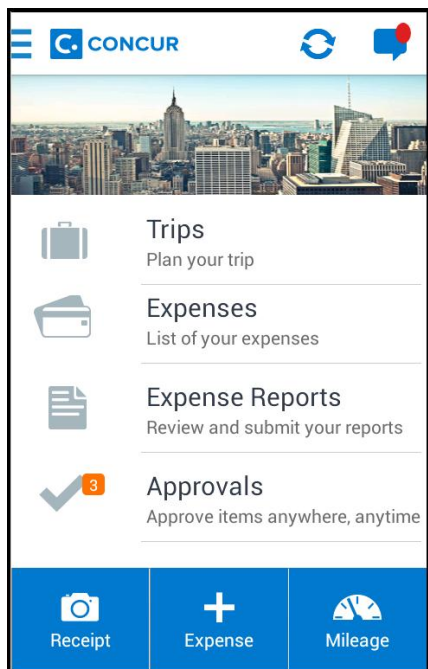


Additional approver required to approve the report and send the report to the next approver in the workflow.

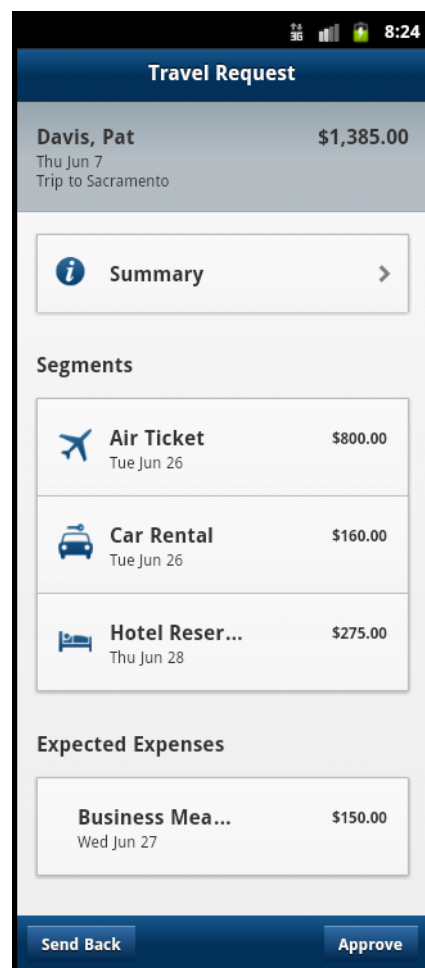
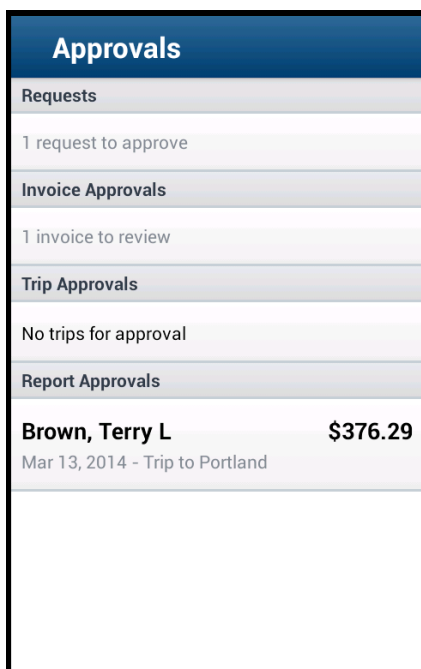
Approve report to approve the report and send it directly to Accounting Review.

Requests

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

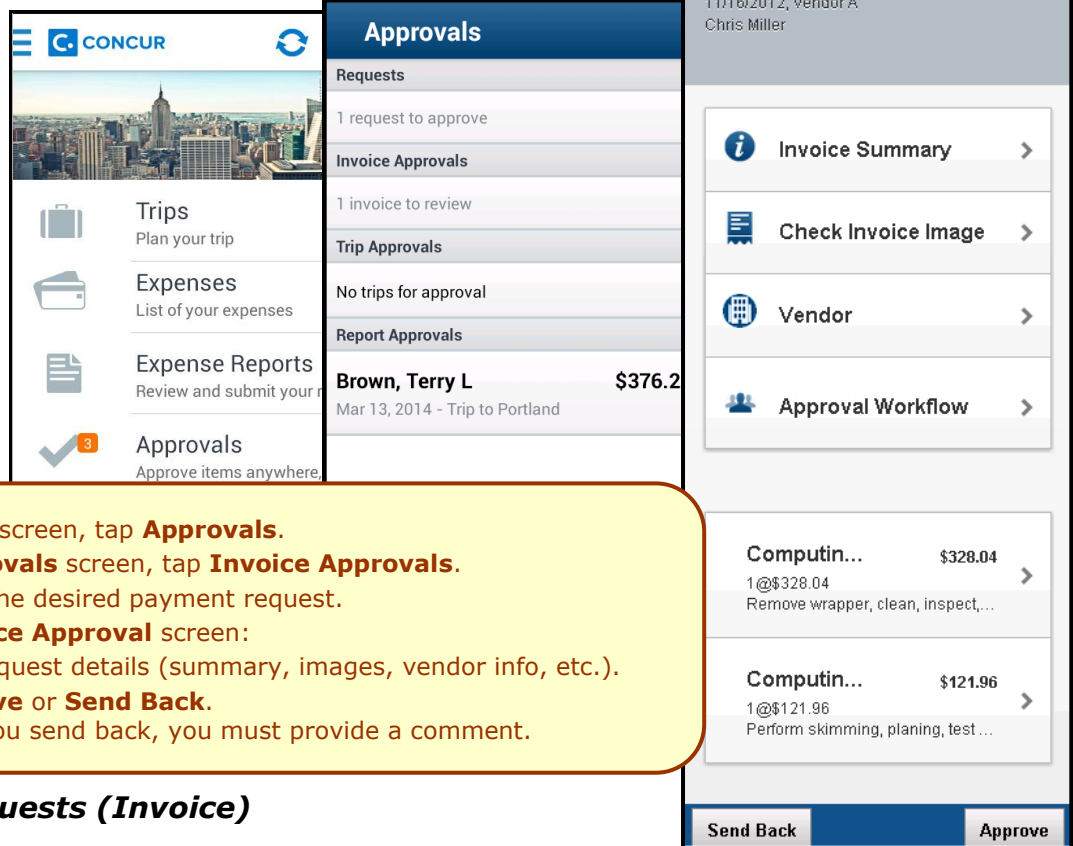


- 1) On the home screen, tap **Approvals**.
- 2) On the **Approvals** screen, tap **Requests**.
- 3) Tap to open the desired request.
- 4) On the **Travel Request** screen:
 - View the request details (segments, expected expenses, etc.).
 - Tap **Approve** or **Send Back**.
NOTE: If you send back, you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



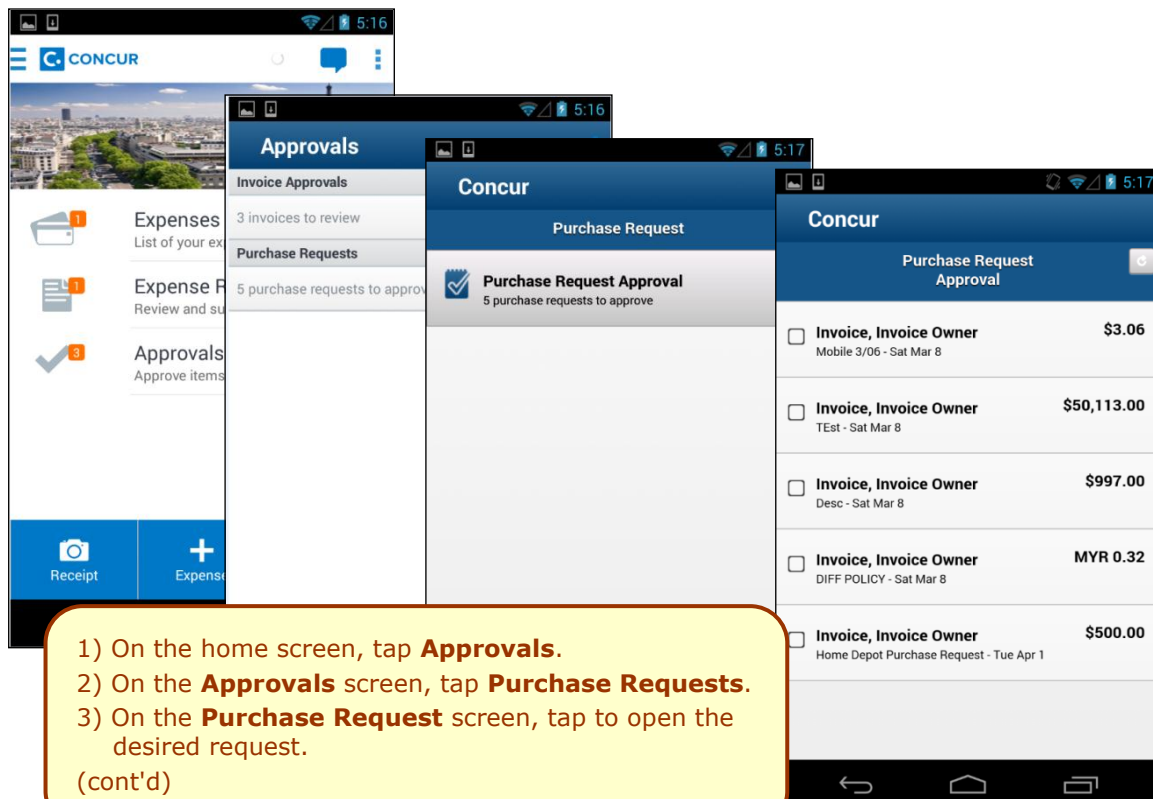
Payment Requests (Invoice)

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 Approvals**.
 - 3) Tap to open the desired payment request.
 - 4) On the **Invoice Approval** 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.

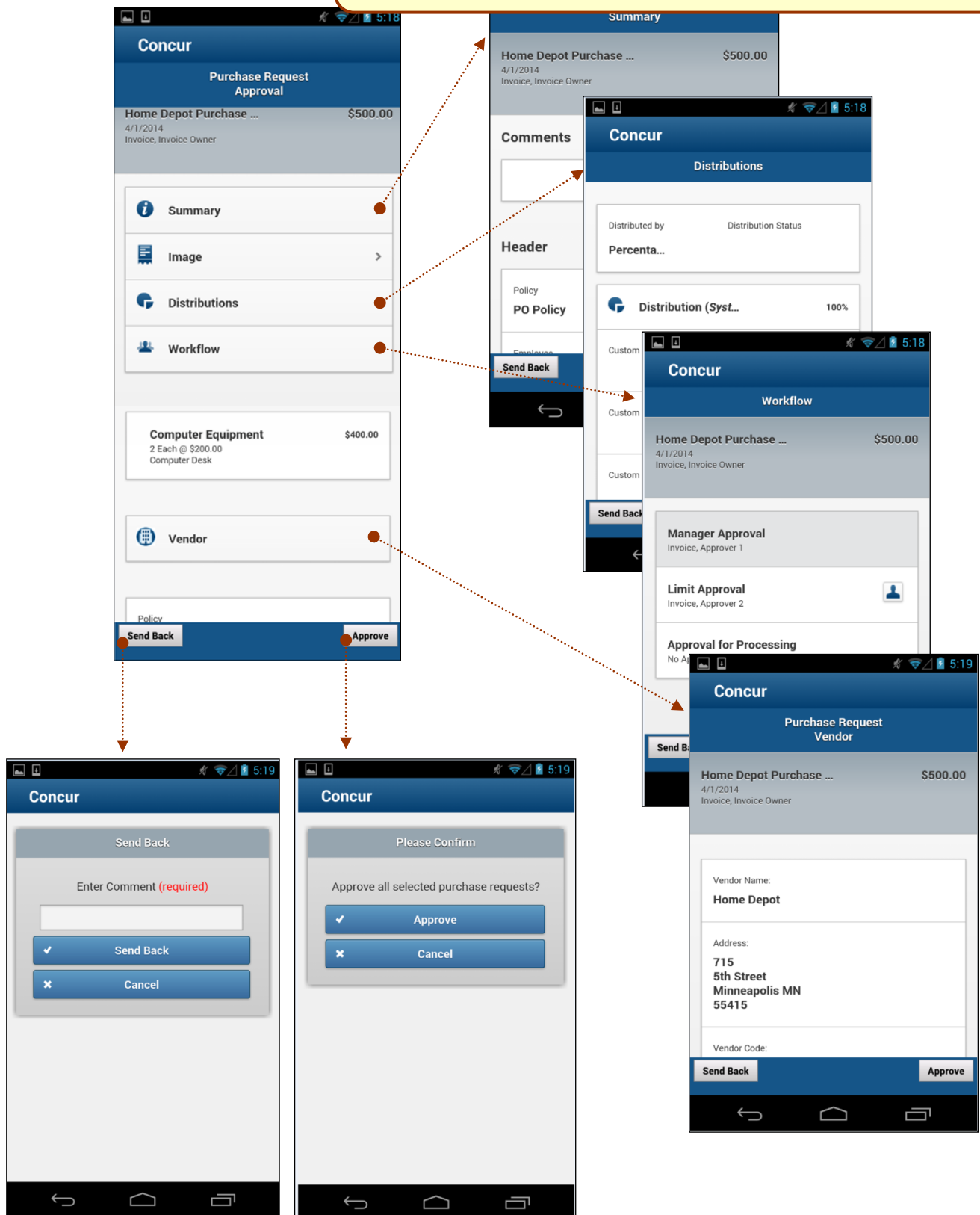
Purchase Requests (Invoice)



- 1) On the home screen, tap **Approvals**.
 - 2) On the **Approvals** screen, tap **Purchase Requests**.
 - 3) On the **Purchase Request** screen, tap to open the desired request.
- (cont'd)

With the purchase request open:

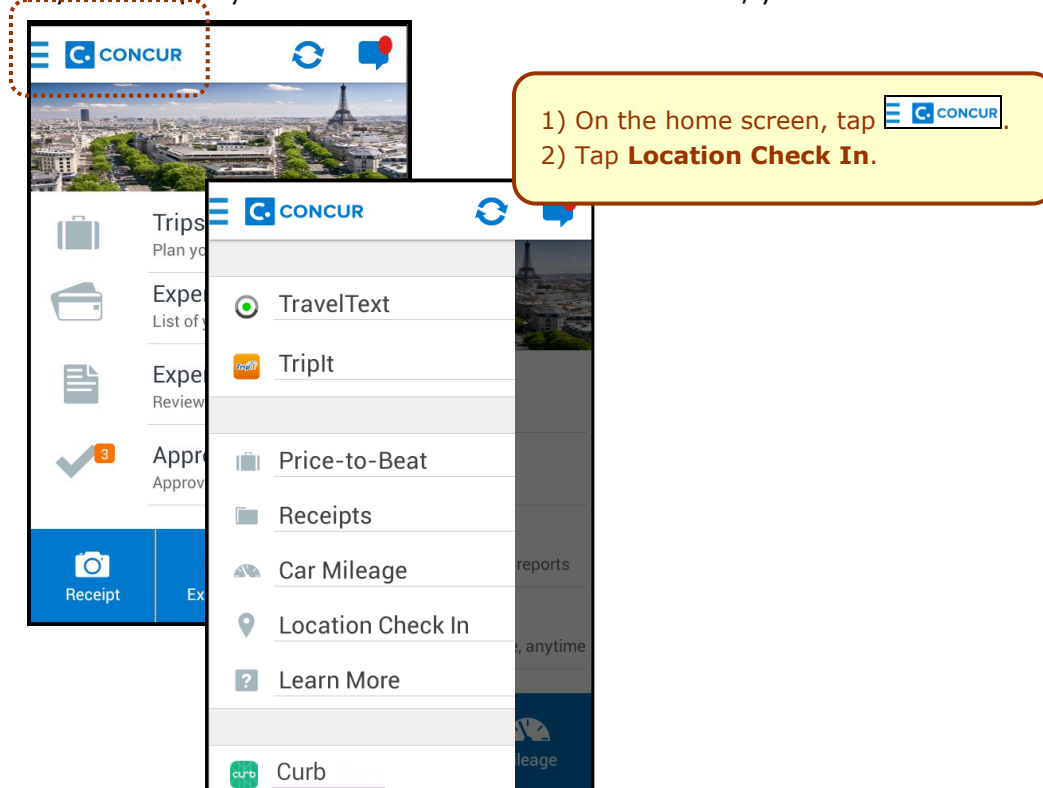
- 4) View the request details (summary, images, vendor info, etc.).
 - 5) Tap **Approve** or **Send Back**.
- NOTE:** If you send back, you must provide a comment.



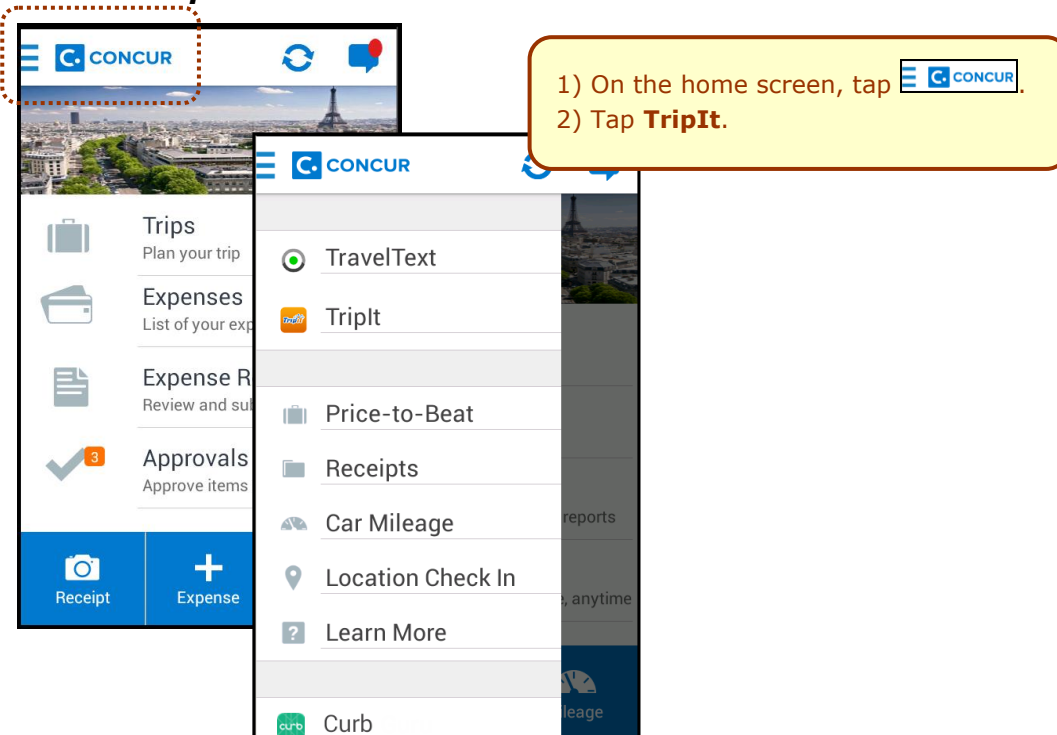
Miscellaneous

Access Locate & Alert

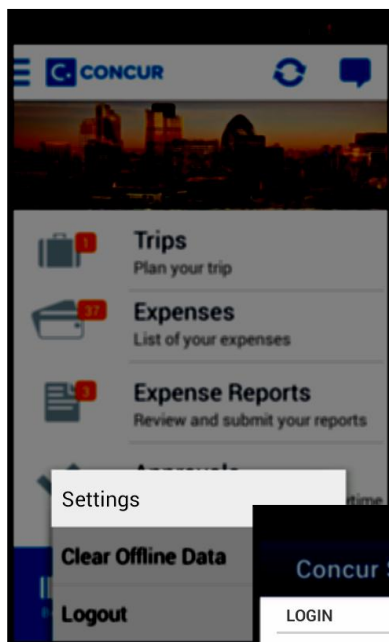
If your company uses Concur's Locate & Alert service, you can check-in using your Android.




Access TripIt



Save Login ID and Auto Login



- 1) On the home screen, tap .
- 2) On the menu, tap **Settings**.
- 3) Tap **Automatically Login** to have Concur log in automatically when you open the app.
- 4) Tap **Save Login** to have Concur remember and then provide your ID at login.

NOTE: You must select **Save Login** in order to use auto login.

