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| Mobile App User Guide  Concur Request  **Last Revised: July 5, 2021** | This guide describes the current version, which is shown on the "[Introduction](https://www.concurtraining.com/customers/tech_pubs/MobileDocs/_MOBdoc_CCC.htm)" guide. | | Applies to these mobile devices:  Yes: iPhone  No: iPad  No: Android |
| **IMPORTANT:** Be aware that your company's configuration may not allow for all of the features described here. Generally, if a feature is not available in your configuration of the web version of SAP Concur, then it is not available in the mobile app. | | | |
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| Concur Request streamlines requisition and travel booking processes for travelers, approvers, and finance teams.  Concur Request users can:   * Make strategic decisions about spending before it happens * Simplify cash advances * Replace tedious email and manual requests into a single system * See the entire audit trail of each request, from submission to approval | |

**Please Note:**

* TheSAP Concur app for iOS and Android supports universal links, i.e. links that navigate directly to the app if it is installed or to the website if not.
* Such links are included in notification emails from SAP Concur related to the expense report changes.
* Universal link support for customers own use is currently not supported.
* Some security solutions may block the links embedded into email from opening the app directly. The proper exceptions for the security policy should be configured for SAP Concur universal link URLs (pattern to match: [https://\*.concursolutions.com/\*](https://*.concursolutions.com/*)). Known cases are:
* MDM/MAM policy that prescribes to open any link tapped in Outlook mobile app only in specified browser.
* Outlook mail server phishing protection that wraps all link embedded into e-mails to open the safety check service first.

## Concur Request

### Initial Feature Set and Options

**Multiple policies per user:** The multiple policies per userfeature is available to SAP Concur mobile users whose company allows them to select from multiple policies.

**NOTE:** If a user can select a different policy while creating a request on the web version of SAP Concur, they can do the same within the mobile app.

**Header form:** The user can select from different policies, which will provide different header forms. **Segment form:** Following are the available default segment forms:

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| --- | --- |
| Air  Hotel  Car Rental  Rail  Dining | Event  Limo  Parking  Taxi  Miscellaneous |

**Segment / Expense types:** All default segment types, expected expenses, and custom segments with their form and layout are supported.

**Workflow:** Only ”Create," "View," "Cancel," "Delete," "Attach," "Close," "Submit," and "Recall" actions are supported.

**NOTE:** For the "Submit" action, in those cases where the client allows the user to select their own approver on submit in the web version of SAP Concur, be aware that this option is not 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 available in the mobile app:

|  |  |
| --- | --- |
| Allocations  Travel Allowances | Request & Travel integration  Car Mileage |

### Create a New Request

| Screen(s) | Description/Action |
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|  | To create a new request:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap  (upper-right corner).  3) On the **New Request** screen, fill in the location and date fields. When done, tap **Create** (upper-right corner). |
|  | The request screen appears with the request details appearing on the **Details** tab. |

### Create a New Cash Advance

| Screen(s) | Description/Action |
| --- | --- |
|  | To create a new cash advance:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap the **Active** tab.  3) On the **Active** tab, tap the desired request.  4) On the request screen, tap the **Details** tab.  5)On the **Details** tab, tap **Cash Advance**.  6) On the **Cash Advance** screen, tap  (upper-right corner). |
|  | 7) On the **Cash Advance** screen, tap **Create** (upper-right corner).  The cash advance appears on the **Cash Advance** screen. |

### Delete a Cash Advance Within a Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To delete a cash advance within a request:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap the **Active** tab.  3) On the **Active** tab, tap the desired request.  4) On the request screen, tap the **Details** tab.  5)On the **Details** tab, tap **Cash Advance**.  6) On the **Cash Advance** screen, swipe the desired cash advance to the left.  7) Tap **Delete**. |
|  | 8) On the **Delete Cash Advance** window, tap **OK**.  The cash advance no longer appears on the **Cash Advance** screen. |

### Add Segments / Expense Types to a Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To add segments / expense types to a request:  1) On the requestscreen, tap  (upper-right corner).  2) On the **Add to your request** screen, (in this case **Air Ticket**), fill in the details and make the desired selections. |
|  | 3) When done, on the segment / expense type screen, tap **Create** (upper-right corner) to return to the request screen.  4) On the request screen, add other segments / expense types as desired. |

### Attach an Attachment to a Travel Request

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|  | To attach an attachment to a travel request:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap the **Active** tab.  3) On the **Active** tab, tap the desired request.  4) On the **Request** screen, tap the **Details** tab. 5) On the **Details** tab, tap **Attachments**.  6) On the **Attachments** screen, you can do the following:   * Tap the desired attachment. *- or -* * If there are no attachments available, tap  (upper-right corner) to attach an attachment. |
|  | 7) On the **Select attachments from** menu, you can do the following:   * **Camera:** Tap **Camera** to capture and attach an attachment. * **From Library:** Tap **From Library** to select and attach an attachment. * **Cancel**: Tap **Cancel** to exit the menu.   8) On the **Recents** screen, tap the desired attachment.  **NOTE**: The image size is limited to 5 megabytes.  After the desired attachment is uploaded, it appears on the **Attachments** screen.  **NOTE:** You can also add attachments by tapping  (upper-right corner) on the **Attachments** screen and then tapping **Attach Document** on the menu. |

### Modify an Attachment on the Attachments Screen

| Screen(s) | Description/Action |
| --- | --- |
|  | To modify an attachment on the **Attachments** screen:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap the **Active** tab.  3) On the **Active** tab, tap the desired request.  4) On the **Request** screen, tap the **Details** tab. 5) On the **Details** tab, tap **Attachments**.  6) On the **Attachments** screen, tap  (upper-right corner).  7) On the menu, you can either tap:   * **Attach Document** *- or -* * **Delete Documents** |

### Delete an Attachment From a Travel Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To delete an attachment from a travel request:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap the **Active** tab.  3) On the **Active** tab, tap the desired request.  4) On the **Request** screen, tap the **Details** tab. 5) On the **Details** tab, tap **Attachments**.  6) On the **Attachments** screen, tap  (upper-right corner).  7) On the menu, tap **Delete Documents.** |
| P189C5T10#yIS1 | 8) On the **Delete Documents** widow, tap **Delete**.  After the desired attachment is deleted, it no longer appears on the **Attachments** screen. |

### Delete a Segment / Expense Type From an Open Unsubmitted Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To delete a segment/expense type from an open unsubmitted request:  1) With the request open, tap the **Expense** tab,  2) On the **Expense** tab, swipe the desired segment / expense type to the left.  3) Tap **Delete**. |
|  | 4) On the **Delete Expense?** menu, tap **OK**.  The segment / expense type no longer appears on the **Request** screen.  **NOTE:** You can also delete a segment / expense type from a request by clicking  (upper-right corner) and then clicking **Delete**. |

### Delete an Unsubmitted Request on in an Open Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To delete an unsubmitted request in an open request:  1) With the request open, tap  (upper-right corner).  2) On the menu, tap **Delete**. |
|  | 3) On the **Delete Request?** window, tap **OK**.  The request no longer appears on the **Request** screen. |

### Delete an Unsubmitted Request on the Request Screen

| Screen(s) | Description/Action |
| --- | --- |
| P225C3T13#yIS2 | To delete an unsubmitted request on the **Request** screen:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap the **Active** tab.  3) On the **Request** screen, tap the **Active** tab.  4) On the **Active** tab, swipe the desired request to the left.  5) Tap **Delete**. |
| P233C5T13#yIS1 | 6) On the **Delete Request?** window, tap **OK**.  The request no longer appears on the **Request** screen. |

### Submit a Request From an Open Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To submit a request from an open request:   * With the request open, tap **Submit.** |

### Submit a Request on the Request Screen

| Screen(s) | Description/Action |
| --- | --- |
|  | To submit a request on the **Request** screen:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap the **Active** tab.  3) On the **Active** tab, swipe the desired request to the left.  4)Tap **Submit**. |

### Recall a Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To recall a submitted request:  1) On the requestscreen, tap  (upper-right corner).  2) On the menu, tap **Recall**. |
|  | 3) On the **Recall Request?** window, tap **OK**.  The request has been recalled and the **Send Back to Employee** message appears on the request screen. |

### Approve a Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To approve a request:  1) On the home screen, tap **Approvals**.  2) On the **Approvals** screen, tap **Request Approvals**. |
|  | 3) On the **Request** screen, tap to open the desired request.  4) On the **Request Approval** screen, you can:   * Tap the **Details** tab to view the request details (comments, cash advances, allocations, and attachments). * Tap the **Expense** tab to view expected expenses. * Tap **Approve** or **Send Back**. **NOTE:** If you send back a request, you must provide a comment. |

### Create a New Expense Claim From an Approved Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To create an expense report from an approved request:  1) On the home screen, tap **Request**  2) On the **Request** screen, tap the **Active** tab.  3) On the **Active** tab, tap the desired approved request.  4) On the approved request screen, you can either tap the:   * **Expense** tab *-or-* * **Details** tab   5) On the **Expense** or **Details** tab, tap **Create Expense Claim**. |

### Cancel an Approved Request From an Open Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To cancel an approved request from an open request:  1) With the desired requestopen, tap  (upper-right corner).  2) On the menu, tap **Cancel**. |
|  | 3) On the **Cancel Request?** window, tap **OK**.  The request no longer appears on the **Request** screen. |

### Cancel an Approved Request on the Request Screen

| Screen(s) | Description/Action |
| --- | --- |
|  | To cancel an approved request on the **Request** screen:  1) On the **Request** screen, tap the **Active** tab.  2) On the **Active** tab, swipe the desired request to the left.  3) Tap **Cancel**. |
|  | 4) On the **Cancel Request?** window, tap **OK**.  The request no longer appears on the **Request** screen. |

### Close an Approved Request From an Open Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To close an approved request from an open request:  1) With the desired requestopen, tap  (upper-right corner).  2) On the menu, tap **Close**. |
|  | 3) On the **Close Request?** window, tap **OK**.  The request no longer appears on the **Request** screen. |

### Close an Approved Request on the Request Screen

| Screen(s) | Description/Action |
| --- | --- |
|  | To close an approved request on the **Request** screen:  1) On the **Request** screen, tap the **Active** tab.  2) On the **Active** tab, swipe the desired request to the left.  3) Tap **Close**. |
|  | 4) On the **Close Request?** window, tap **OK**.  The request no longer appears on the **Request** screen. |

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