You can use SAP 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), payment and purchase requests (Concur Invoice), etc.

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

The **Mobile Registration** link appears on the **Profile** menu in the web version of SAP 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 SAP 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).

Sign In

Tap ![App Icon](image) in your device apps list. Then, on the **Sign In** screen, enter your work email or your SAP 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 SAP Concur.

**NOTE:** SAP Concur will not let you sign in if your device does not have a passcode or if your device has been compromised (modified to remove manufacturer restrictions).

The home screen provides access to your trips, expenses, expense reports, approvals, and more. The options that appear on the home screen vary depending on the user's permissions.
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 Boston

**Mar 11, 2019**  
Agency Record Locator: MSTDZ

<table>
<thead>
<tr>
<th>Mon Mar 11</th>
<th>Tue Mar 12</th>
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<tr>
<td><strong>Trip from Seattle to Boston</strong></td>
<td><strong>Trip from Seattle to Boston</strong></td>
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<tr>
<td><strong>3:40 PM</strong></td>
<td><strong>12:08 AM</strong></td>
</tr>
<tr>
<td><strong>3:40 PM</strong></td>
<td><strong>12:08 AM</strong></td>
</tr>
<tr>
<td><strong>Terminal 1 - Gate A</strong></td>
<td><strong>Terminal 1 - Gate A</strong></td>
</tr>
<tr>
<td><strong>Reservation Status:</strong> Confirmed</td>
<td><strong>Confirmation #: 43373001U56</strong></td>
</tr>
<tr>
<td><strong>Class:</strong> ECONOMY Seat: 34A</td>
<td><strong>Pickup:</strong> Tue Mar 12 12:08 AM: Boston (BOS)</td>
</tr>
<tr>
<td><strong>Ticketing:</strong> E Ticket Aircraft: 328 Stops: 0 Meal: G</td>
<td><strong>Returning:</strong> Fri Mar 15 12:00 PM: Boston (BOS)</td>
</tr>
<tr>
<td><strong>Flight Schedules:</strong></td>
<td><strong>Status:</strong> Confirmed Rate: $289.64 Daily Rate: $46.00 Rate Type: C</td>
</tr>
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**Notes:**  
- **Economy / Car / Automatic transmission / Air conditioning**
- **F of Cars:** 1

**Additional Information:**  
- **Avis**  
  **Confirmation #: 43373001U56**
  **Pickup:** Tue Mar 12 12:08 AM: Boston (BOS)  
  **Returning:** Fri Mar 15 12:00 PM: Boston (BOS)
  **Status:** Confirmed Rate: $250.67 Total Rate: $860.56
  **Cancel Policy:** 24/48 HRS Cancellation permitted with up to 25% Cancellation fee.

**Flight Schedules:**  
- **(LAX) Los Angeles, CA to (BOS) Boston, MA**  
  **Mar 11, 2019**
  - **AA 1804**  
    - **LAX** Mon 5:46 AM  
      - **BOS** Mon 3:12 PM  
    - **Sh 27m / 0 Stops**
  - **AA 167**  
    - **LAX** Mon 8:40 AM  
      - **BOS** Mon 5:20 PM  
    - **Sh 41min / 0 Stops**
  - **AA 382**  
    - **LAX** Sat 5:16 AM  
      - **BOS** Sat 2:50 PM  
    - **Sh 27m / 0 Stops**
  - **AA 1629**  
    - **LAX** Mon 5:55 AM  
      - **BOS** Tue 12:55 PM  
    - **Sh 28min / 0 Stops**
  - **AA 2455**  
    - **LAX** Mon 8:15 PM  
      - **BOS** Tue 3:42 PM  
    - **Sh 27m / 0 Stops**
  - **AA 814 / AA 575**  
    - **LAX** Mon 6:05 AM  
      - **BOS** Mon 4:19 PM  
    - **Sh 1hr / 1 Stop**
  - **AA 1805 / AA 1569**  
    - **LAX** Mon 6:05 AM  
      - **BOS** Mon 4:37 PM  
    - **Sh 1hr / 1 Stop**
  - **AA 2452 / AA 1360**  
    - **LAX** Mon 6:05 AM  
      - **BOS** Mon 4:37 PM  
    - **Sh 1hr / 1 Stop**
**Book a Flight**

To access the Book Air menu option:

- On the home screen, tap ![Book Air icon] (lower-left corner) or ![Book Air icon] (upper-left corner) and then Book Travel.
- or –
- On the home screen, tap Trips. On the Trips screen, tap Book a Trip or ![Trips icon] (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, if applicable.

3) If there are multiple flights available, another screen appears. On that 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).

![Diagram of Book Air and Flight Details screens with steps highlighted]
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 **Trips**. 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 **Search** screen:
   - Enter the search criteria.
   - Tap **Search**.
2) On the **Hotels** screen, tap the desired hotel.
3) On the next screen, tap the desired room.
4) On the next screen:
   - Review for accuracy.
   - Fill in the fields (if any) and make the desired selections.
   - Tap **Reserve Room**.
**Book Amtrak Direct Connect**

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

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

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

Then:

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

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

3) On the **Fare Choices** screen, tap the desired fare.

4) On the **Train Detail** screen:
   - Review for accuracy.
   - Fill in the fields (if any) and make the desired selections.
   - Tap **Reserve** (upper-right corner).
**Cancel a Hotel or Rental Car Reservation**

1) 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**

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

**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. 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.
**Expense Report List (Active and History Sections)**

On the home screen, tap **Expense Reports** to access the list of expense reports.

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

On the **Reports** screen, you can view up to 100 expense reports in each of the **Active** or **History** sections. In the **Active** section, you can:

- View unsubmitted, submitted (but not yet paid), and returned reports.
- Create a new report.
- Copy reports.
- Delete unsubmitted reports.
- View red and yellow earmarked reports flagged for exceptions.
- View the name, status, date, and amount of each report.

You can open an existing expense report and:

- View and edit the report summary (report header).
- View and attach receipt images.
- Add simple as well as more intricate expenses (car mileage/kilometers, attendees, and itemizations).
- View, add, import, match, edit (add attendees and itemizations), and remove expenses.
- Submit your report.
In the **History** section, you can:

- View reports that have been approved and sent for payment.
- Copy reports.
**Create a Mobile Expense**

To create a mobile expense:

- On the home screen, tap ![Expense icon](lower-right corner).
  
- Or

- On the home screen, tap **Expenses**, then on the Expenses screen, tap ![Plus icon](green).

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 ![Plus icon](green).

3) Take a picture of the receipt or grab an existing image from the Library or from (Receipt Store) Available Receipts.

4) Tap **Save**.
**Move a Single Mobile Expense, E-Receipt, or Credit Card Charge to a New or Existing Report**

1) On the *Expenses* screen, swipe the desired expense, e-receipt, or credit card charge to the left.

2) Tap *Move*.

3) On the *Select Report* screen, tap the desired report or tap the + (upper-right corner) to create a new report.
DELETE A SINGLE MOBILE EXPENSE, E-RECEIPT, OR CREDIT CARD CHARGE

1) On the Expenses screen, swipe the desired expense, e-receipt, or credit card charge to the left.
2) Tap Delete.
Create a New Expense Report

You can create a new report:

- From the Reports screen (shown here).
- While adding expenses from the 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 + (upper-right corner).
3) On the New Report screen:
   - SAP Concur provides a report name. Change it if desired.
   - Fill in the fields and make the desired selections.
   - Tap Create (upper-right corner).
4) On the report screen, enter your expenses, add receipts, etc. (described on the following pages).
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 Add to expense report menu, tap Add New Expense.  
5) On the Expense Types screen, select the desired expense type.  
6) On the Expense Details screen:  
   • Fill in the fields and make the desired selections.  
   • Tap Save.
**Move Expenses From the Expenses Screen to a Report**

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

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

**Edit Report Header Information**

You can view and edit the report header information.

1) With the report open, click **Details**.
2) From the **Details** tab, make the desired changes.
3) Tap **Save** (upper-right corner).
Add a Car Mileage (or Kilometer) Expense

To add a personal car mileage expense:

- Tap the **Mileage** button on the home screen (lower-right corner)

**NOTE:** The Mileage icon only appears if your company has the Personal Car Mileage feature activated and when you have registered a personal car on the Profile > Profile Settings > Personal Car page. This icon does not appear for company car.

- or -

- Tap (upper-left corner) and then **Car Mileage**.

- or -

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:** SAP Concur calculates the amount based on the distance and the company’s mileage rate.
   - Tap **Save** (upper-right corner).
ADD A CAR MILEAGE (OR KILOMETER) EXPENSE—MILEAGE CALCULATOR

The Mileage Calculator can be used for both personal and company car mileage. The example below shows personal mileage, using the Mileage icon on the home screen. For company car mileage, the user creates an expense as usual and selects the Company Car Mileage (or something similar) expense type. After that, both types work the same way – as shown below.

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

**NOTE:** This icon appears only if the company’s configuration includes personal car mileage and if the user has defined a personal car in Profile.

2) On the Select Report screen, either:
   - Add to an existing report by selecting the report.
   - or
   - Tap + (upper-right corner) to create a new report. Complete the steps to create the new report.

3) On the Add Car Mileage screen, tap Add Route.
4) On the **Distance Calculator** screen, in the **Start Location** field, start typing the initial location.  
5) Select from the list of locations. The selected location appears on the map.
6) On the Distance Calculator screen, in the Add Destination field, start typing the ending location.

7) On the Location screen, select from the list of locations. The selected location appears on the map along with the mileage (lower-right corner).

8) On the Distance Calculator screen, you have several additional options:
   - Tap Add Destination to add another destination.
   - Tap Options (upper-right corner) to choose to avoid tolls or highways.
   - If an alternate route is available (shown as a gray line), you can select that route.

9) When done, tap Use Route. The mileage and the reimbursement amount appear on the Add Car Mileage screen.
MAKE ADJUSTMENTS

1) To make additional adjustments, on the Add Car Mileage screen, tap Route Details.

2) On the Route Details screen, click (upper-right corner) to access the menu. Using the menu, you can:
   - Edit any portion of the trip.
   - Designate part of the trip as personal.

3) To edit a route:
   - On the menu, tap Edit Route.
   - Make the desired changes, using the same steps as when you created the route.
4) To designate part of the trip as personal:
   - On the menu, tap **Set Segment as Personal**.
   - On the **Set Personal** screen, select the segment that is personal.
   - Tap **Done**. On the **Route Details** screen, the personal distance shows at the top of the screen and the personal segment shows "(personal)".
5) To deduct commute mileage:
   - On the **Route Details** screen, tap **Deduct Commute Distance**.
   - Define the starting and ending points using the map.
   - Select whether the commute is one way or round trip.
   - When done, tap **Use Route**. The **Route Details** screen appears.
6) Tap **Add Car Mileage** (upper-left corner) to return to the **Add Car Mileage** screen, where the adjusted distance and amount appear.

7) Tap **Save**. The expense is saved to the expense report.
**Add/Edit/Delete an Itemization**

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.

To **edit** an itemization, tap the desired itemization and then make the desired changes.
To **delete** an itemization, swipe the desired itemization to the left and then tap **Delete**.
**Add/Edit/Delete Attendees**

You can add attendees to the expense if the expense is attached to an expense report. (Just like with the web version of SAP 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 one or more attendees.
4) On the menu, tap one of the following:
   - **Add from Calendar** to import attendees from your calendar.
   - **Search from Contact** to select from your 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).
To **edit** an attendee, tap the desired attendee name and then make the desired changes.

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 Data**

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 SAP Concur, then you can delete them here, too.

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

**Delete an Expense Report From the Reports Screen**

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

**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 SAP Concur.)

1) From the Reports screen, on the Active tab, swipe the desired report. The **Delete** button appears.  
2) Tap **Delete**.
Remove an Expense From an 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 remove any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of SAP Concur.)

Submit an Expense 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**.
View/Add/Edit/Delete Allocations

You can view report-level allocations, expense-level allocations, and itemization-level allocations.

VIEW REPORT-LEVEL ALLOCATIONS

The Allocation Summary screen shows that the expenses are allocated to two cost centers (Development and Program Management at 50% each). Each equals $75 with a total of $150. ($150 = the office supply expense on the report.)

1) With report open, on the Expense tab, tap the desired expense.
2) On the Expense Details screen, tap Allocations.
3) On the Allocations screen:
   - Review the information.
   - Tap (upper-left corner) to return to the report.
**VIEW EXPENSE-LEVEL ALLOCATIONS**

1) On the report screen, tap the desired expense.
2) On the **Expense Details** screen, tap **Allocations**.
3) On the **Allocations** screen:
   - Review the information.
   - Tap ✖️ (upper-left corner) to return to the report.
**VIEW ITEMIZATION-LEVEL ALLOCATIONS**

1) On the report screen, tap the desired expense.
2) On the Expense Details screen, tap View Itemizations.
3) On the Itemizations screen, tap the desired itemization.
4) On the **Itemization** screen, tap **Allocations**.

5) On the **Allocations** screen:
   - Review the information.
   - Tap (upper-left corner) to return to the report.
**ADD/EDIT/DELETE ALLOCATIONS**

1) To **add** allocations, on the Expense Details screen, tap Allocations.
2) On the Allocations screen, tap New Allocation.
3) On the New Allocation screen:
   - Fill in the fields (if any) and make the desired selections.
   - Tap Done.
4) On the Allocations screen, tap (upper-right corner) to add additional allocations.
5) To **edit** an allocation, on the Allocations screen, tap the desired allocation to open it and then make the desired changes.

6) To **delete** an allocation, on the Allocations screen:
   - Swipe left and tap Delete.
   - Tap Delete to delete all allocations for an expense.
7) At the bottom of the Allocations screen, review the Allocated and Remaining percentages.
CREATE ITEMIZATION-LEVEL ALLOCATIONS

1) On the Itemization screen, tap Allocations.
2) On the Allocations screen:
   • Tap New Allocation.
   • Fill in the fields (if any) and make the desired selections.
   • Tap (upper-right corner) to add additional allocations.
Once items are allocated, an Allocation icon appears next to the expense and at the report level.
Receipts

Attach Receipts

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

1) On the Expense Details screen, the report screen, or the Receipts tab, you can add a 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).

**NOTE**: Turn the device horizontally or upside down to correctly adjust the camera screen.
**Capture Multipage Receipts**

You can use the multipage receipts feature to capture multipage receipts. For example, you can use this feature to capture standalone receipts to create quick expenses or to capture receipts for ExpenseIt (if your company uses ExpenseIt) to process within the SAP Concur mobile app.

To capture multipage receipts:

1) On the home screen, tap ExpenseIt.

2) On the camera screen, tap (upper-right corner). The multipage feature is now activated.

**NOTE:** SAP Concur does not certify uploaded receipts that have not been captured in in the SAP Concur mobile app.
3). On the next camera screen, tap the desired receipt to capture
4) Repeat this process to capture the desired receipts.
5) After capturing all the appropriate receipts, tap either:
   - Done
   - or -
   - Cancel
CREATE A MOBILE EXPENSE FROM A RECEIPT

1) On the Expenses screen, swipe the desired receipt to the left.
2) Tap Expense.
3) On the Expense screen, fill in the fields (if any) and make the desired selections.
4) Tap Save.
DELETE RECEIPTS

1) On the Expenses screen, swipe the desired receipt to the left.
2) Tap Delete.
ATTACH A MISSING RECEIPT DECLARATION TO AN EXPENSE

Attach a missing receipt declaration to an expense.

1) On the Reports screen, tap + to create a new expense.
2) Fill in the fields and make the desired selections.
3) Tap Save.
4) Tap the desired expense.
5) On the Receipt Viewer screen, tap Add Receipt.
6) From the list, select Missing Receipt Declaration.
7) On the Terms & Conditions screen, tap Accept.

The Missing Receipt Declaration appears on the Receipt Viewer screen.

**Missing Receipt Declaration**

Disclaimer
Affidavit explanation goes here.

Agreement
Affidavit statement/acceptance goes here.
Copy Report From Existing Report

1) From the Reports screen, on the Active tab, swipe the desired report to the left.
2) Tap Copy.
A box appears (with the existing report name), requesting a new report name.  3) Enter the new name and then tap **Confirm**.

The copied report appears.  4) Make the desired changes, attach receipt images, etc.  5) Save or submit as usual.  The copied report appears on the **Active** tab of the **Reports** screen.
**Work With Fixed Travel Allowances**

Users can now claim their **fixed** meals and **fixed** lodging travel allowances in the SAP Concur mobile app.

**Fixed vs Reimbursable Travel Allowances**

- **Fixed** travel allowances – often referred to as *per diems* – provide a defined daily amount regardless of the actual amount spent by the user
- **Reimbursable** travel allowances generally provide reimbursement for the actual amount of the expense. The ability to create and manage reimbursable travel allowances is not yet available in the SAP Concur mobile app

**Restrictions**

For the most part, fixed travel allowances work the same way in the mobile app as on the web version of SAP Concur – with some exceptions. These configuration options are not available in the mobile app:

- Users cannot define/select:
  - Trip length
  - "Short distance"
  - "Extended trips"
  - "Use Percent Rule"
  - Location "within municipality"

- Users cannot enter:
  - Actual meal amounts
  - Rate location

The mobile version of SAP Concur does not combine meals and lodging rates nor does it display base rates, company rates, government rates, etc.

If the user's configuration uses any of the options listed above, the user should manage their travel allowances using the web version of SAP Concur.
CREATE FIXED ALLOWANCES

1) With a report open, tap Claim Allowances.
2) On the Add Itinerary screen, you can select an existing itinerary.
   - or -
   You can create a new itinerary. (We will create a new itinerary.)
3) On the **New Itinerary** screen:
- Enter the itinerary name.
- Enter the departure and arrival location, date, and time.
- Tap **Add return trip to...** to obtain the return trip fields.
- Enter the return trip information.
- Repeat for each leg of the trip, entering the exact "arrival" address if necessary.
4) On the **New Itinerary** screen, review the itinerary for accuracy and tap **Save**. The new itinerary appears on the **Itineraries** tab of the **Travel Allowances** screen.
5) If adjustments are necessary (for example, to deduct for provided meals), tap the **Adjustments** tab on the **Travel Allowances** screen.

6) Tap to open the daily allowance that requires adjustment.

7) On the **Daily Allowance** screen:
   - Make the desired adjustments, in this case, to indicate that breakfast was provided on Tuesday.
   - **NOTE:** If the web version of SAP Concur provides a list of options instead of Yes/No, then the list appears here as well.
   - Tap **Save**.
8) On the Travel Allowances screen:
   - Notice that the Tuesday amount has been adjusted.
   - Make any other required adjustments.
   - Tap Exit to return to the expense report.

9) On the report screen:
   - Review for accuracy.
   - Tap Travel Allowances if changes are necessary.
   - Finish adding expenses, receipts, etc. Submit when ready.
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.

In the Report Approvals and Trip Approvals sections ❗️ indicates that there are exceptions.

If the approval type does not have any approvals, then that type does not appear on the Approvals screen. For example, if there are no trips to approve, then Trip Approvals does not appear.
Expense Reports

If you are an expense report approver, you can access the reports that require your approval.

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

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 (Invoice)

If you are a request approver, you can access the requests that require you to approve or submit.

**NOTE:** This also includes Cost Object Approvals and Authorized Approvals.
VIEW AND SUBMIT PAYMENT REQUESTS

**REPORT APPROVALS**

<table>
<thead>
<tr>
<th>Close</th>
<th>Approvals</th>
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<tbody>
<tr>
<td>TA Jinbi</td>
<td>Tue 11/14</td>
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<tr>
<td>Bailey O Gato</td>
<td>$23.00</td>
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<td>Bailey O Gato</td>
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<tr>
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<td>Invoice Approvals</td>
<td>2</td>
</tr>
<tr>
<td>Invoice Submission</td>
<td>702</td>
</tr>
</tbody>
</table>
1) On the Invoice Submission screen, tap to open the desired payment request.
2) Tap the Summary, Line Items, and Images tabs to access and review all information.
3) When done, tap **Submit**.
**Submit One or More Payment Requests**

1) On the **Invoice Submission** screen, tap (upper-right corner). A selection circle appears to the left of each payment request.
2) Tap the desired selection circles.
3) Tap **Submit**.
**Purchase Requests (Invoice)**

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

**NOTE:** This also includes Cost Object Approvals and Authorized Approvals.

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.
Concur Locate

Location Check In or Request Safety Assistance

If your company uses the SAP Concur messaging service, you can send your check-in location details to your company or request assistance using your mobile device.

**NOTE:** While your mobile device is offline, the SAP Concur mobile app keeps and displays your previous check-in location details.
On the **Check In Location** screen, you can check-in to your current location only while your mobile device is online.
On the **Request Safety Assistance** screen, you can request assistance only while your mobile device is online.

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

Use the **Location Access** feature to allow/disallow SAP Concur access to your location.

1) On the **Allow SAP Concur to use your location?** screen, tap either:
   - **I Agree**
   - **No, Thanks**

   **NOTE:** If you tap **I Agree**, the **Allow “SAP Concur” to access your location while you are using the app?** screen appears.

2) On the **Allow “SAP Concur” to access your location while you are using the app?** screen, tap either:
   - **Don’t Allow**
   - **Allow**
Access the **Location Access** feature to select location options.

1) On the **Settings** screen, tap **Location Access**.
2) On the **Location Access** screen, tap the desired location option.
Concur Drive

If your company uses Concur Drive, you can automatically use GPS to track your travel – either manually or automatically – on your mobile device.

The SAP Concur mobile app captures your route data - which is available in Concur Expense and on the mobile app - where you can select the segments to add to an expense report.

**Track Mileage Automatically**

Use **Mileage** on the home screen to set up the day and time (for example, Monday through Friday, 8 AM to 5 PM) for which the app will automatically track your trips by detecting car movement.

To set Drive to track distance **automatically:**
1) Tap **Mileage** (lower-right corner) of the main screen.
2) On the menu that appears, tap **Enable Concur Drive.**
3) On the **Drive Settings** screen, tap **Scheduled.**
4) Make the desired selections. Drive will track distance automatically during the times the user have selected.
**Track Mileage Manually**

Use **Mileage** on the home screen to initiate GPS tracking manually with a click of a button and then stop when you want your

To use Drive to track distance manually:
1) Tap **Mileage** (lower-right corner) of the main screen.
2) On the menu that appears, tap **Start**. (This option appears if **User-Initiated** is selected in Settings.)
3) When done, tap **Mileage** (lower-right corner) again.
4) On the menu, tap **Stop**.
If your company uses ExpenseIt, you can manage your expenses start to finish. The SAP Concur mobile app will turn your receipts into expense entries and then send them directly into Concur Expense.

**Convert Receipts into Expenses**

Use ExpenseIt on the home screen to turn your receipts into expenses.

1) Tap ExpenseIt.
2) Take a picture of the receipt. SAP Concur analyzes the receipt information.
3) When the analysis is complete, open the receipt, attach to a report, edit as necessary, etc.
4) When done, click **Move To Report**.
**On-Device Receipt Recognition**

**AUTOMATICALLY DETECT RECEIPT AMOUNT**

To convert a receipt amount automatically in ExpenseIt:
1) On the home screen, tap **ExpenseIt**.
2) On the **Confirm Amount** screen, either:
   - Tap the amount.
   - or-
   - Tap **Incorrect**, to enter an appropriate amount.

What is the amount on this receipt?

- 27.30

- Incorrect
MANUALLY ENTER THE CORRECT RECEIPT AMOUNT

To manually enter the correct receipt amount:
1) On the **Confirm Amount**.
2) On the **Enter Amount** screen, enter the appropriate amount and tap **Use** when finished.
3) On the **Finalise** screen, either:
   - Tap **Next receipt** to go to the next receipt.
   - **or**
   - Tap **Done** to finish.
Use settings for the following:
- Save your user name
- Automatically sign in
- Turn on Touch ID
- Turn on Face ID
- Send an error log to SAP Concur
- Clear the cache
- Reset to the factory defaults
- Sign out
Get Help

Use Help on the menu to search for help topics or find helpful articles.
**Leave Feedback**

Use **Leave Feedback** on the menu to send feedback.

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**Feedback**

Thanks for taking the time to provide feedback. The information you provide will help us improve.

Which of the following areas would you like to provide feedback on?

**Required** – select between 1 and 7

- Drive
- Mileage expense
- Approvals
- Booking travel
- Viewing itinerary
- Completing expense report
- Receipt/expense capture
- Other

We appreciate all your feedback. Please provide as much detail as possible so we can improve our experience for you.

Please leave detailed feedback

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The SAP Concur mobile app – iPad®