|  |  |  |  |
| --- | --- | --- | --- |
| Mobile App User Guide  Concur Request  **Last Revised: July 5, 2023** | 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:  No: iPhone  No: iPad  Yes: 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. | | | |
|  | | [Concur Request 2](#_Toc139382230)  [Initial Feature Set and Options 2](#_Toc139382231)  [Create a New Request 2](#_Toc139382232)  [Create a New Cash Advance 4](#_Toc139382233)  [Delete a Cash Advance Within a Request 5](#_Toc139382234)  [Add Segments/Expense Types to a Request 6](#_Toc139382235)  [Add Multi – City Segments to a Request 7](#_Toc139382236)  [Attach an Attachment to a Travel Request 8](#_Toc139382237)  [Delete an Attachment From a Travel Request 9](#_Toc139382238)  [Cancel an Approved Request in an Open Request 10](#_Toc139382239)  [Cancel an Approved Request on the Request Screen 11](#_Toc139382240)  [Close an Approved Request in an Open Request 12](#_Toc139382241)  [Close an Approved Request on the Request Screen 13](#_Toc139382242)  [Delete an Unsubmitted Request on in an Open Request 14](#_Toc139382243)  [Delete an Unsubmitted Request on the Request Screen 15](#_Toc139382244)  [Delete a Segment / Expense Type From an Open Unsubmitted Request 16](#_Toc139382245)  [Submit a Request 17](#_Toc139382246)  [Recall a Request 17](#_Toc139382247)  [Approve a Request 18](#_Toc139382248)  [Create a New Expense Report From an Approved Request 19](#_Toc139382249) | |
| 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/\*). 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:

|  |  |
| --- | --- |
| 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," "Close," "Submit," and "Recall" actions are supported in the mobile app.

**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 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 |
| --- | --- |
|  | To create a new request:  1) On the home screen, tap **Request**.  2) On the **Request** screen, tap the **Active** tab.  3) On the **Active** tab, tap P85C4T4#yIS1 (lower-right corner). |
|  | 4) On the **New Request** screen, fill in the fields. When done, tap **Create** (upper-right corner).  5) From the request screen, on the **Details** tab, review the request details. When done, tap **Submit**. |

### 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 P102C4T5#yIS1 (lower-right corner). |
|  | 7) On the **Cash Advance** screen, tap **Create** (upper-right corner).  8) 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**. |
|  | 7) On the **Delete Cash Advance** window, tap **Confirm**.  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 P132C4T7#yIS1.  2) On the **Expense Types** screen, select the desired segment/expense type. |
|  | 3) On the segment/expense type screen, (in this case **Air Ticket**), fill in the details and make the desired selections.  4) When done, on the segment/expense type screen, tap **Create** (upper-right corner) to return to the request screen.  5) Add other segments/expense types as desired. |

### Add Multi – City Segments to a Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To add multi – city segments to a request:  1) On the requestscreen, tap P146C4T8#yIS1.  2) On the **Expense Types** screen, select the desired segment (in this case **Air Ticket**). |
|  | 3) On the segment (in this case **Air Ticket**) screen, tap the **Multi City** tab.  5) On the **Multi City** tab, fill in the details and make the desired selections.  4) When done, on the segment screen, tap **Save** (upper-right corner) to return to the request screen.  5) Add other segments as desired. |

### Attach an Attachment to a Travel Request

|  |  |
| --- | --- |
|  | 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 P168C4T9#yIS1 to attach an attachment |
|  | 7) On the attachmentsmenu, you can do the following:   * **Attach via Camera:** Tap **Attach via Camera** to capture and attach an attachment. * **Attach via Photo Album:** Tap **Attach via Photo Album** to select and attach an attachment. * **Cancel**: Tap P174C6T9#yIS1to exit the menu.   8) On the **Gallery** 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 P176C6T9#yIS1 (lower-right corner) on the **Attachments** **[#]** screen and then tapping **Attach Document** on the menu. |

### 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.** |
|  | After the desired attachment is deleted, it no longer appears on the **Attachments** screen. |

### Cancel an Approved Request in an Open Request

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

### Close an Approved Request in an Open Request

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

### Close an Approved Request on the Request Screen

| Screen(s) | Description/Action |
| --- | --- |
| P238C3T14#yIS2 | 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.  2) Tap **Close**. |
|  | 3) On the **Confirm** menu, tap **OK**.  The request no longer appears on the **Request** screen. |

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

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

### Delete an Unsubmitted Request on the Request Screen

| Screen(s) | Description/Action |
| --- | --- |
|  | To delete an unsubmitted 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.  2) Tap **Delete**. |
|  | 3) On the **Confirm** menu, tap **OK**.  The request no longer appears on the **Request** screen. |

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

| Screen(s) | Description/Action |
| --- | --- |
|  | To delete a segment/expense type from a an open unsubmitted request:  1) From the open request, on the **Expenses** tab, swipe the desired segment/expense type to the left.  2) On the **Expense Types** screen, select the desired segment/expense type. |
| P284C5T17#yIS1 P284C5T17#yIS2 | 3) On the **Confirm** menu, tap **OK**.  The segment/expense type no longer appears on the **Request** screen. |

### Submit a Request

| Screen(s) | Description/Action |
| --- | --- |
|  | To submit a request:   * On the requestdetails screen, tap **Submit.**   The request has been submitted and the **Submitted & Pending Approval** message appears on the request screen. |

### 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**. |
| P313C5T19#yIS2 | 3) On the **Confirm** 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:   * View the request details (segments, expected expenses, etc.). * Tap **Approve** or **Send Back**. **NOTE:** If you send a request back, you must provide a comment. * Once **Approve** is selected on the **Approve Request?** screen, tap **Approve**. |

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

| Screen(s) | Description/Action |
| --- | --- |
| P336C3T21#yIS2 | 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 review the request details by tapping on the:   * **Expenses** tab *-or-* * **Details** tab   5) Once done, tap **Create Expense Report**.  The **Expense** screen appears with the expense report details. |

**☼**