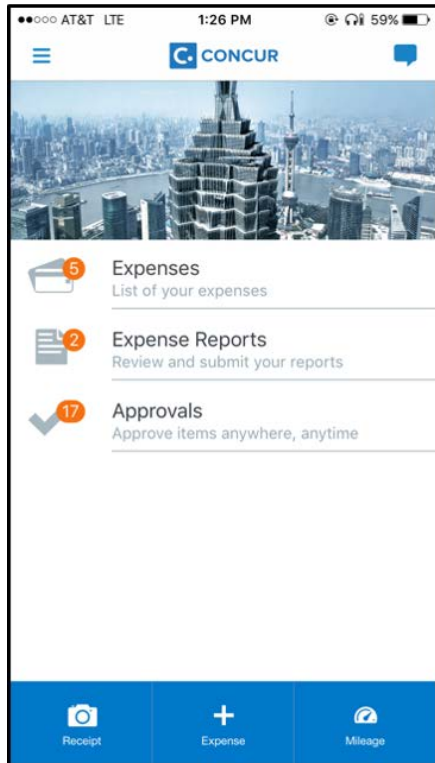**Sunland Construction Introduction to........**

# Concur's mobile app – iPhone®

Version 9.47 – August 7 2017

You can use Concur on your smartphone to assist with your Expense 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 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.

## THIS GUIDE

This guide provides brief "how to" steps. It assumes that the user already knows how to use the web version of Concur and already understands the concepts of Expense  (expenses, itemizations, attendees, etc.), the approval process, and so on. It also assumes that the user is generally familiar with their mobile device. This guide is available in DOC and PDF format. You can use the DOC as a starting point for your own training materials. Both are available in online Help (end user and admin) in the web version of Concur.

## Download

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

- You can download the app or you can use this page to request a link.

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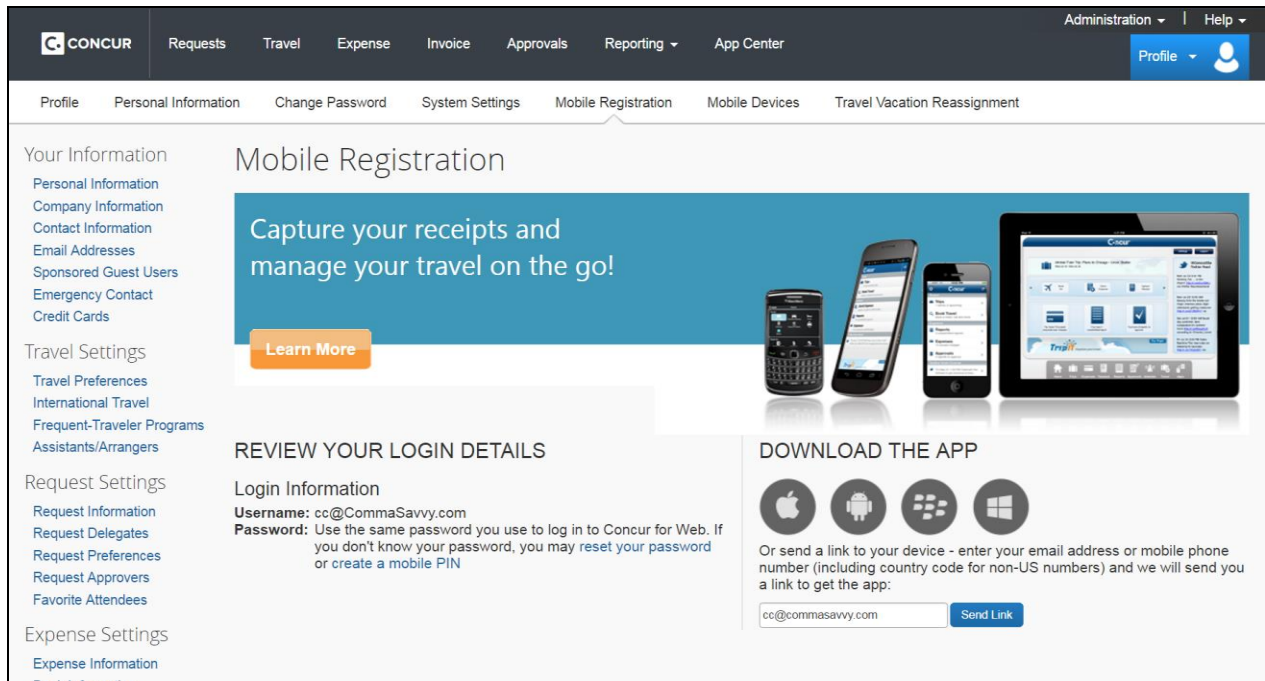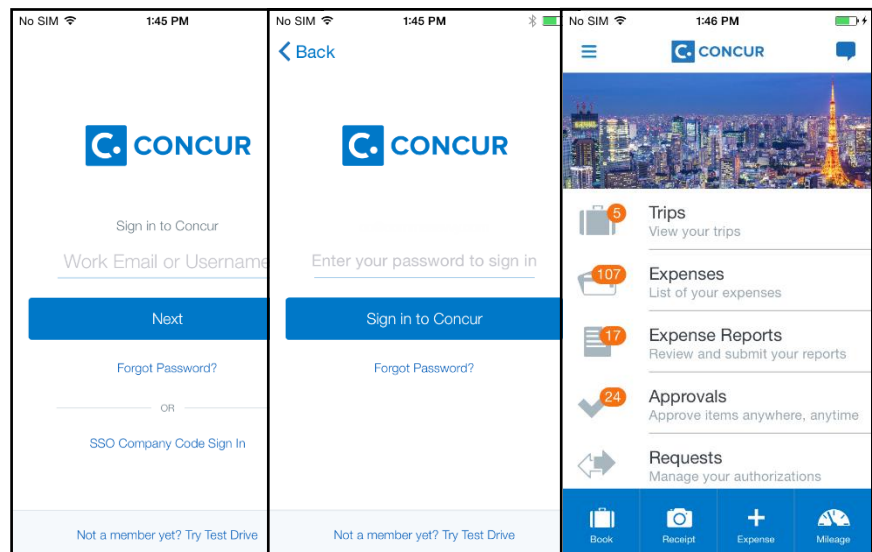


## Sign In

Tap  in your device apps list. Then, on the **Sign in to Concur** screen, enter your work email or your Concur (web version) user name. Tap **Next**. On the next screen, enter your password and tap **Sign In to Concur**.

– or –

Tap SSO Company Code Sign In if your company uses SSO to access the Concur mobile app.



**NOTE:** 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).
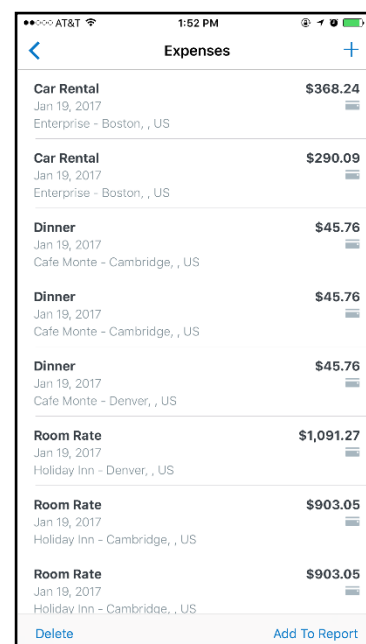
The home screen provides access to your trips, expenses, expense reports, approvals, and more.

## 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 [Mileage] icon (lower-right corner) on the home screen.

- View and make minimal edits to card transactions, which appear with the [card] icon.

  - To make more extensive edits, add the card transaction to an expense report then edit.

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

- View e-receipts, which can be edited once attached to a report.

- Attach expenses – *mobile* expenses, e-receipts, and card transactions – to a new or existing expense report.
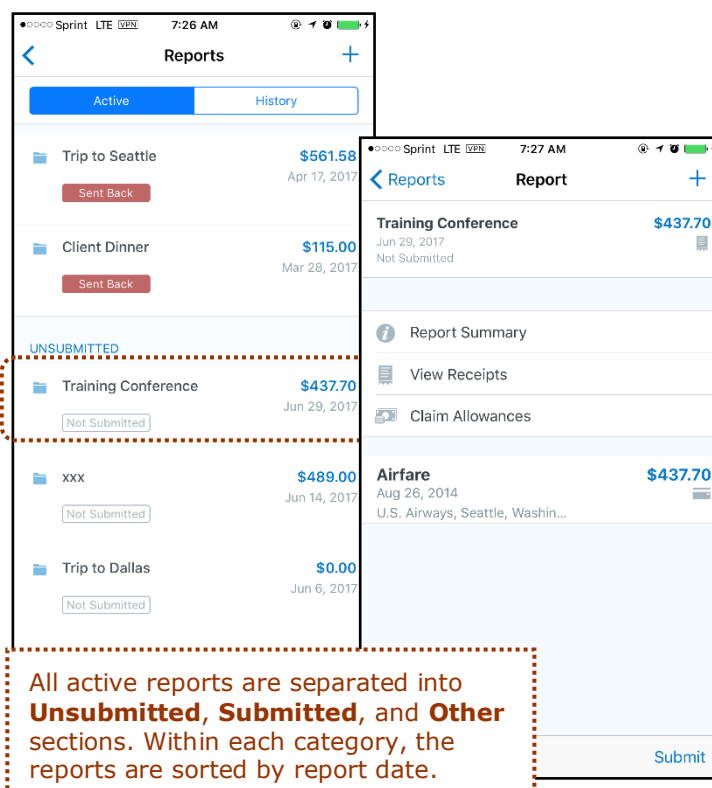
### *Expense Report List (Active and History Sections)*

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

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

You can open an existing expense report and:

- View and edit the report summary (report header)
- View and attach receipt images
- 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
- View red and yellow earmarked reports flagged for exceptions
- Copy reports
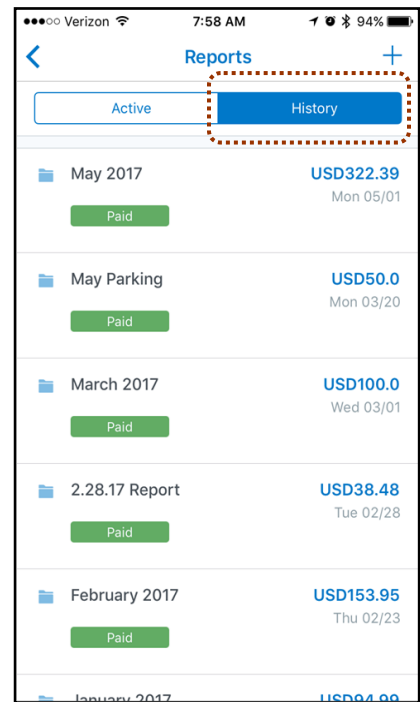
## Create a New Expense Report

You can create a new report:

- From the **Reports** screen (shown here)
- While adding expenses from the **Expenses** screen (described on the following pages)
- While creating a car mileage expense (described on the following pages)
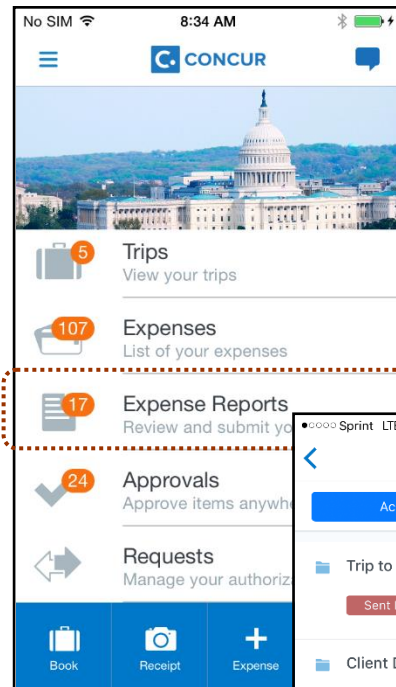
> 1) On the home screen, tap **Expense Reports**.
> 2) On the **Reports** screen, tap ⊞ (upper-right corner).
> 3) On the **Create Report** screen:
>    - Concur provides a report name. Change it if desired.
>    - Fill in the fields and make the desired selections.
>    - Tap **Save** (upper-right corner).
> 4) On the **Report** screen, enter your expenses, attach receipts, etc. (described on the following pages).
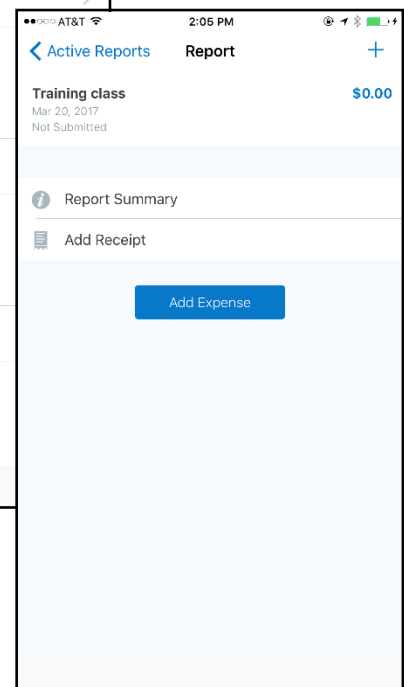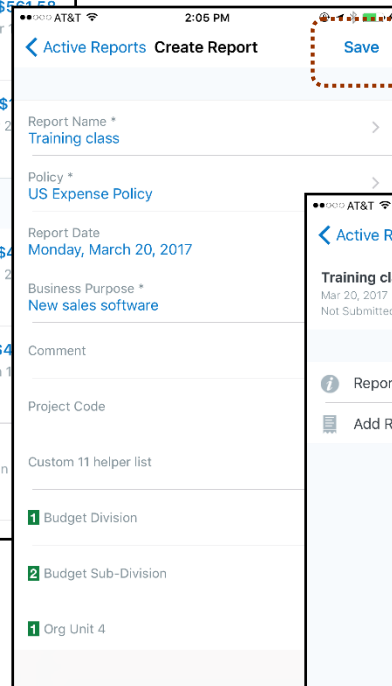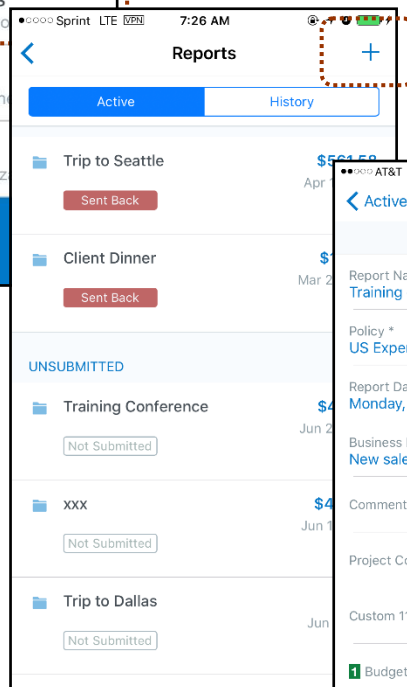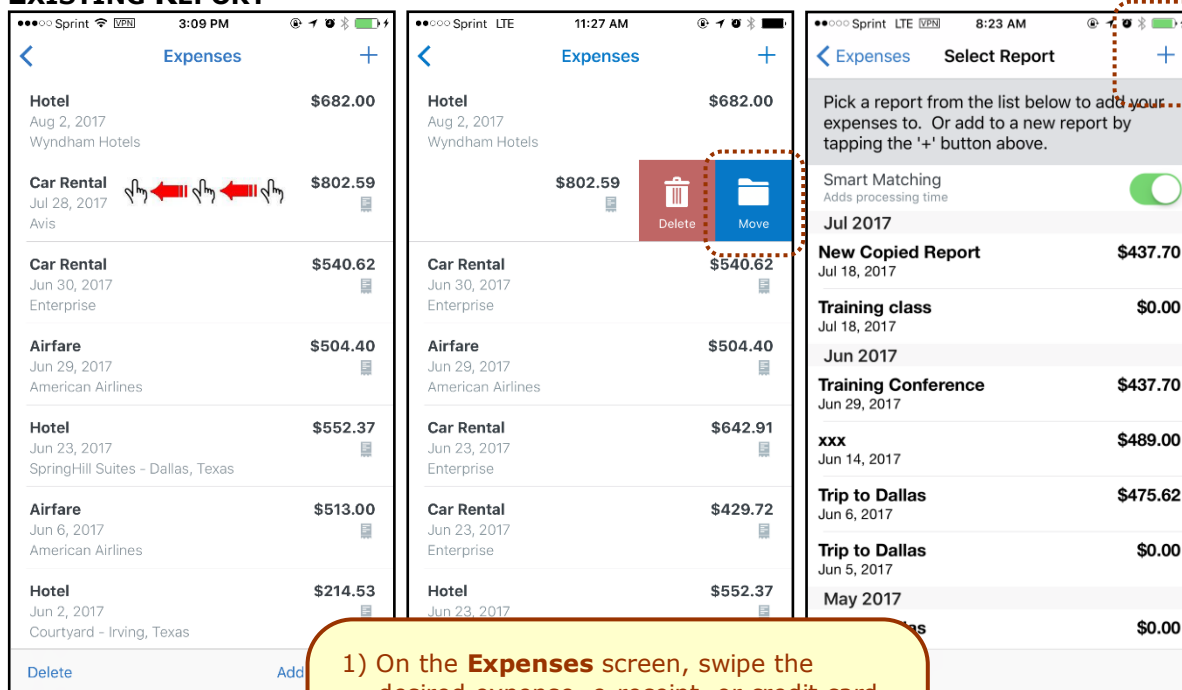
## Move Expenses from the Expenses Screen to an Expense Report

You can move one or more expenses to an existing expense report or use them to create a new expense report.

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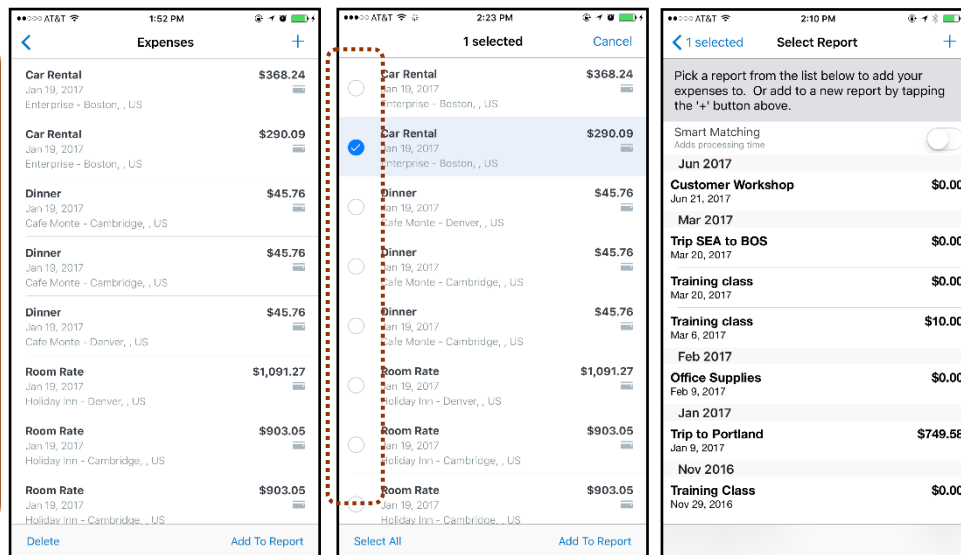


## MOVE A SINGLE MOBILE EXPENSE, E-RECEIPT, OR CREDIT CARD CHARGE TO A NEW OR EXISTING REPORT



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.

## Edit an Expense on an Expense Report

If an expense is attached to an ***unsubmitted*** expense report, you can edit almost every field.
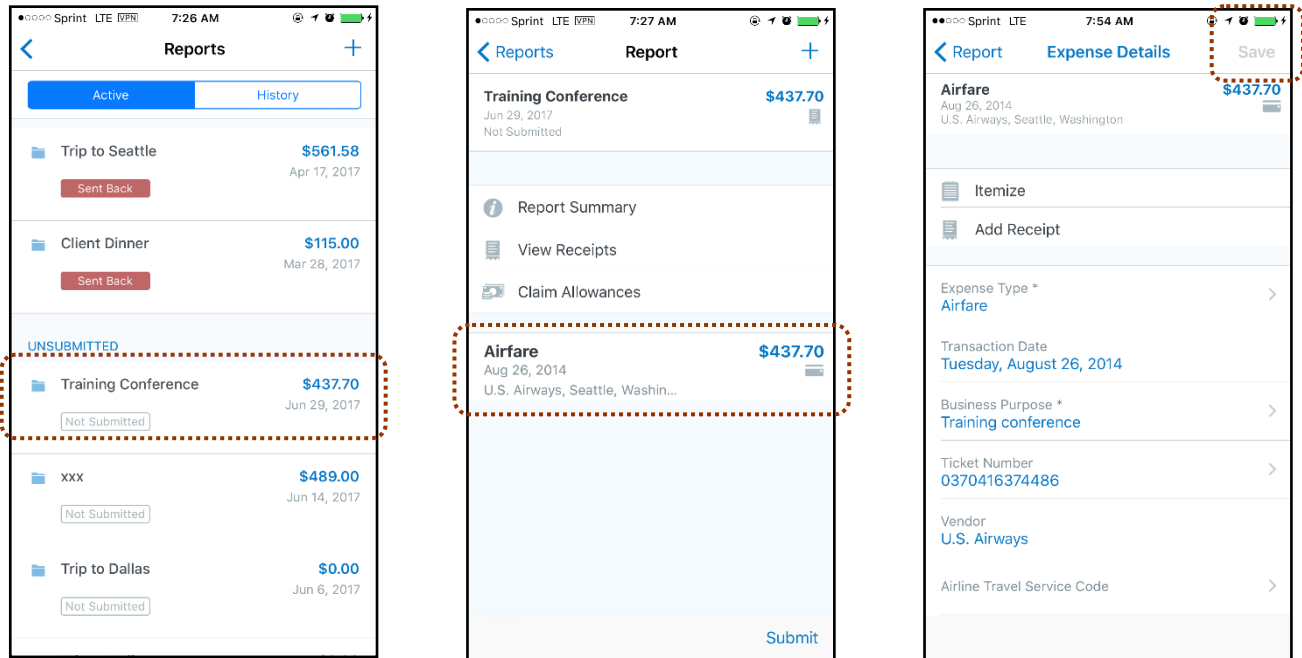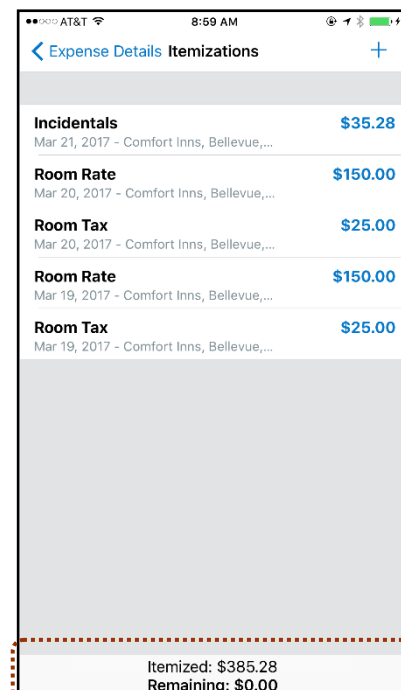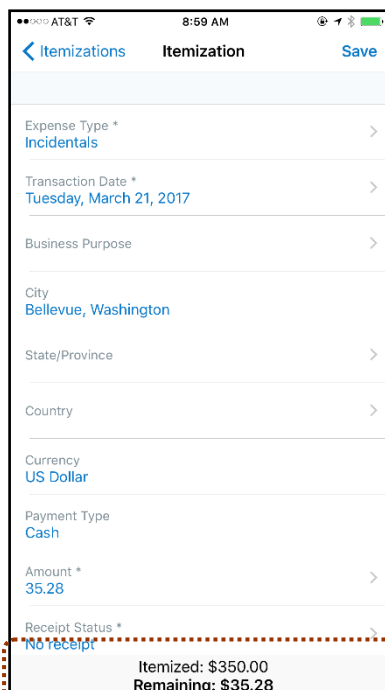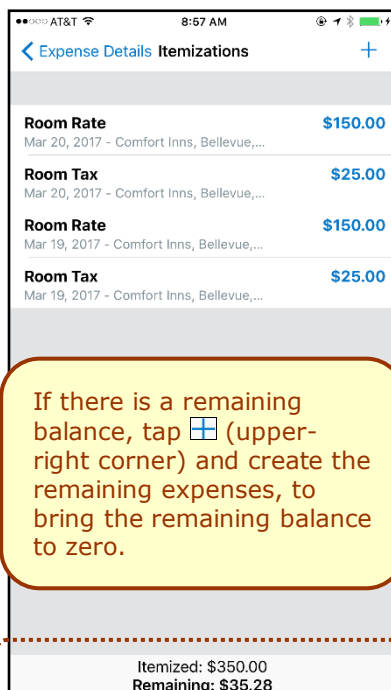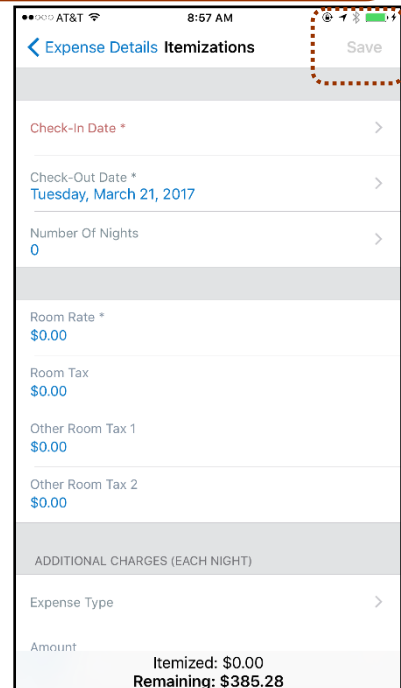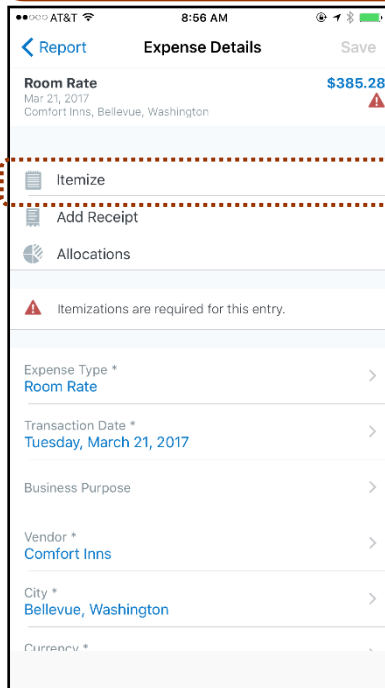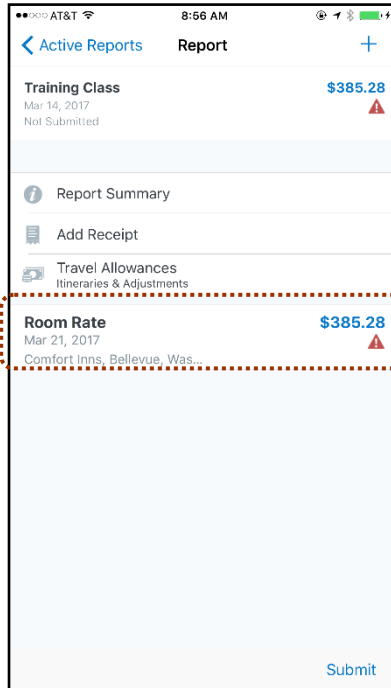
1) On the **Reports** screen, tap **Active** and then tap to open the desired report.
2) On the **Report** screen, tap to open the desired expense.
3) On the **Expense Details** screen:
   - Make the desired changes.
   - Tap **Save** (upper-right corner).

## Add/Edit/Delete an Itemization

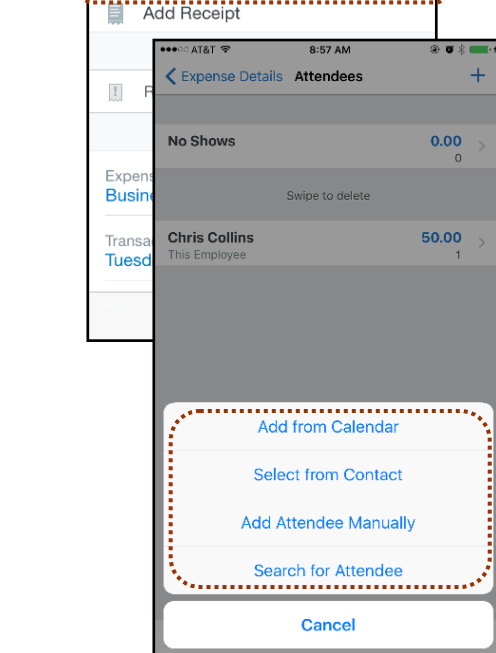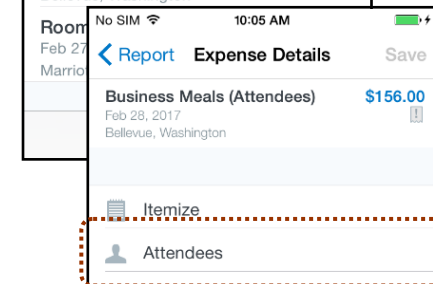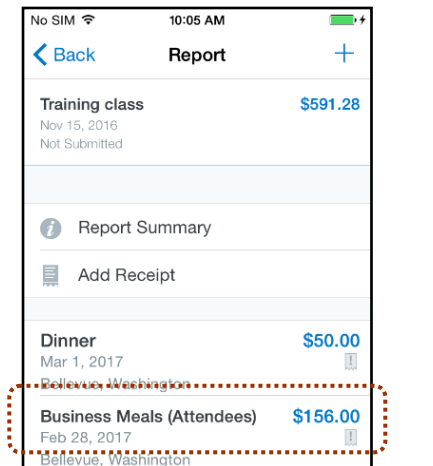After an expense has been added to a report, you can itemize the expense.

1) On the **Report** screen, tap to open the desired expense.
2) On the **Expense Details** screen, tap **Itemize**.
3) On the **Itemizations** screen:
   - Enter the daily room rate and daily tax rate.
   - Tap **Save** (upper-right corner). The itemizations appear.



If there is a remaining balance, tap ⊞ (upper-right corner) and create the remaining expenses, to bring the remaining balance to zero.

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*

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

1) On the **Report** screen, tap to open the desired expense.
2) On the **Expense Details** screen, tap **Attendees**.
3) On the **Attendees** screen, tap ⊞ (upper-right corner) to add.
4) On the menu, tap one of the following:
   - **Add from Calendar** to import attendees from your calendar
   - **Search from Contact** to select from your smartphone contact list
   - **Add Attendee Manually** to manually add the attendee
   - **Search for Attendee** > **Quick Search** to search your Favorite Attendees
   - **Search for Attendee** > **Advanced Search** to search your company's list of attendees or from an external
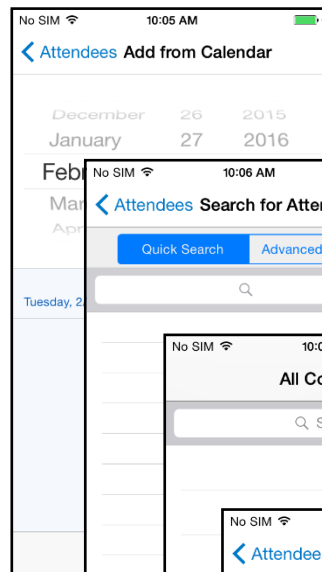
Add from Calendar

Search for Attendee > Quick Search

Search for Attendee > Advanced Search
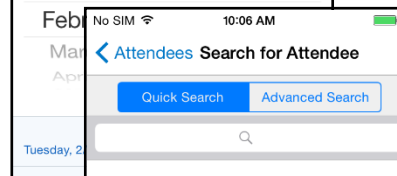
Select from Contact

Add Attendee Manually

To *edit* an attendee, tap the desired attendee name and then make the desired changes.
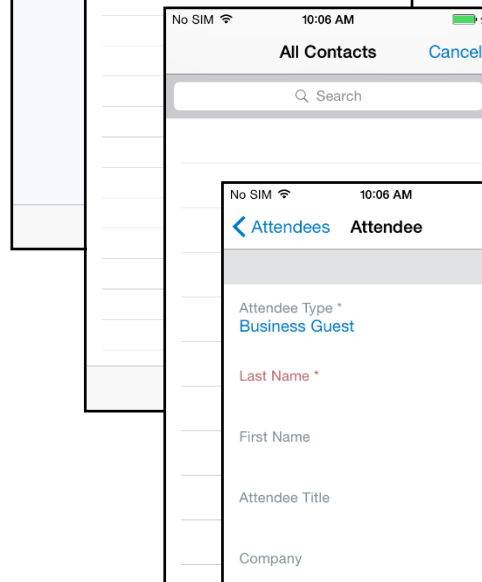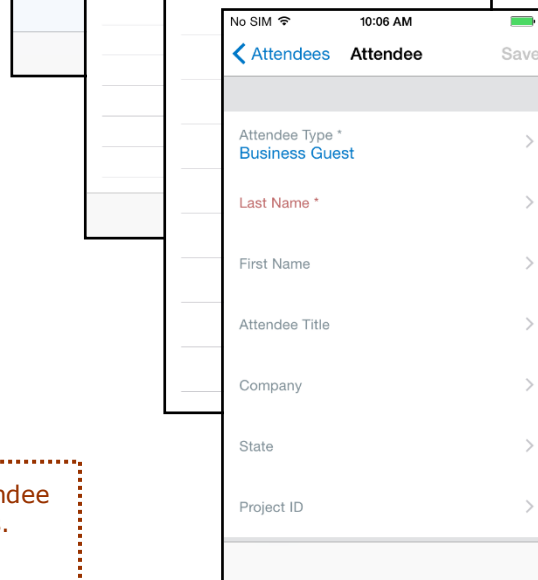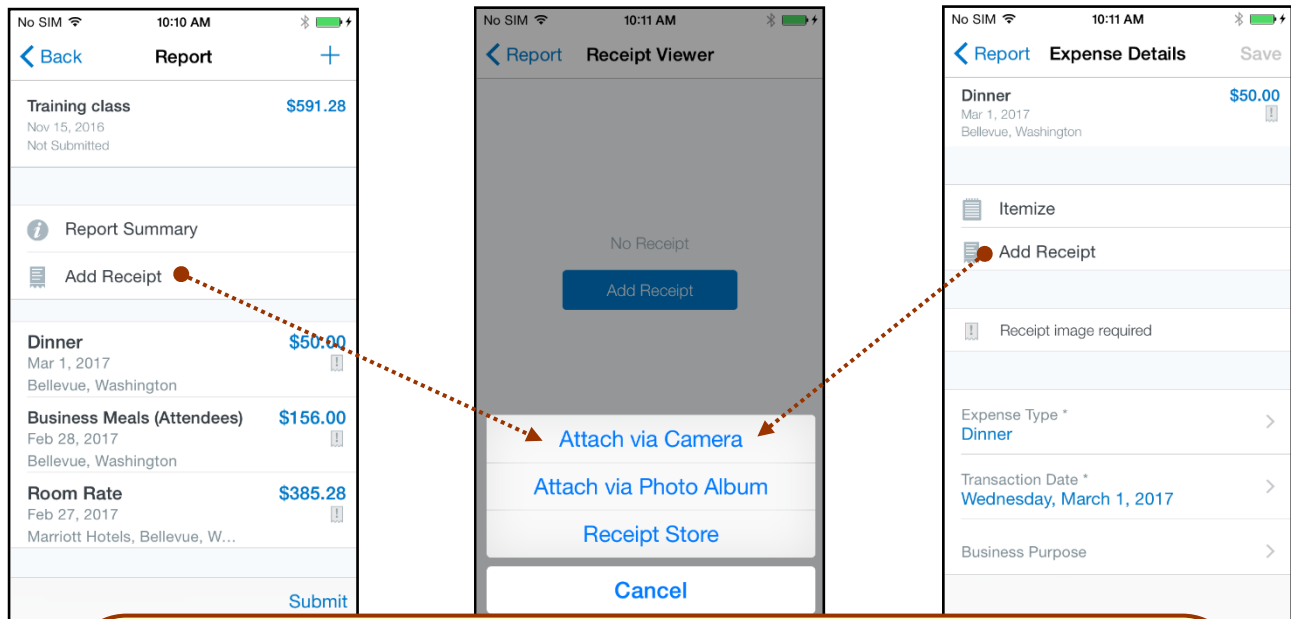To *delete* an attendee, swipe the desired attendee to the left and then tap **Delete**.

## *Receipts*

### ATTACH RECEIPTS

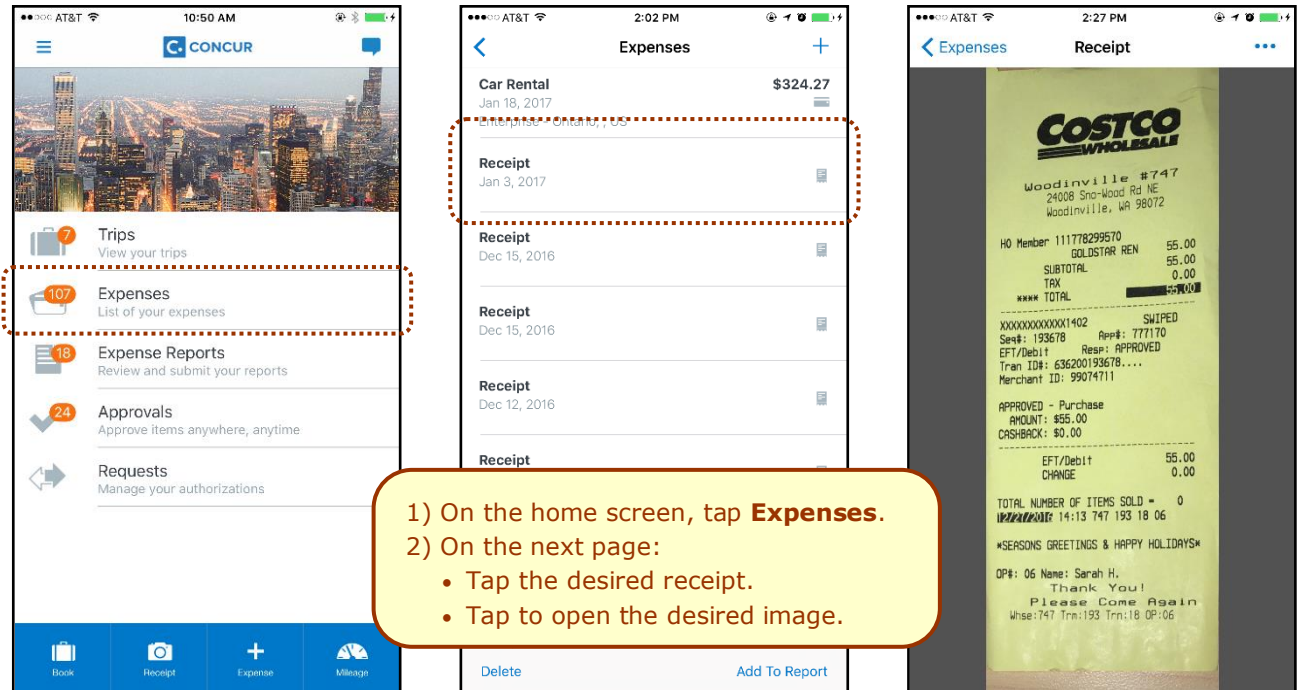Attach a receipt to a report or to an individual expense, whichever the situation requires.



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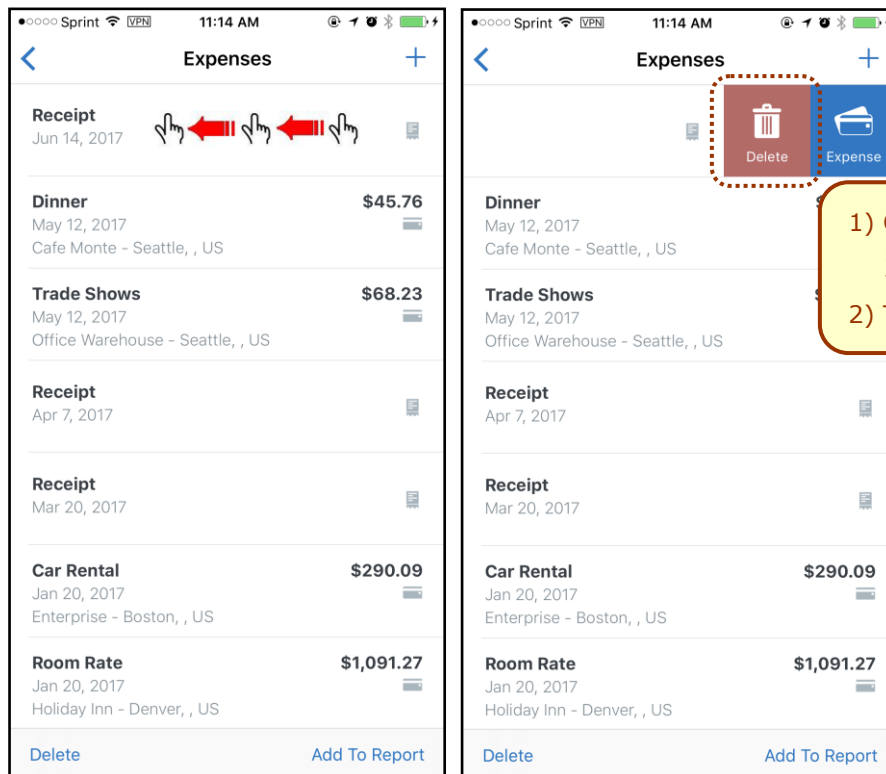2) On the menu, tap:
   - **Attach via Camera** to use your device camera
   - **Attach via Photo Album** to select an image in your device photos
   - **Receipt Store** to select an image in your Concur Receipt Store

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

## VIEW RECEIPTS



1) On the home screen, tap **Expenses**.
2) On the next page:
   - Tap the desired receipt.
   - Tap to open the desired image.

## DELETE RECEIPTS



1) On the **Expenses** screen, swipe the desired receipt to the left.
2) Tap **Delete.**

## Remove an Expense from an Expense Report

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

> 1) On the expense report, swipe the desired expense to the left. The **Delete** button appears.
> 2) Tap **Delete**.
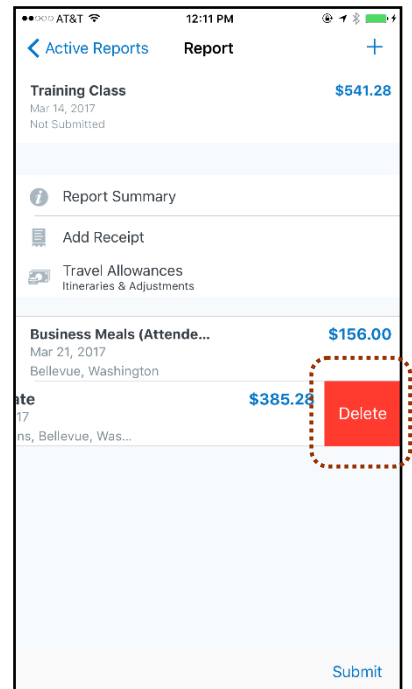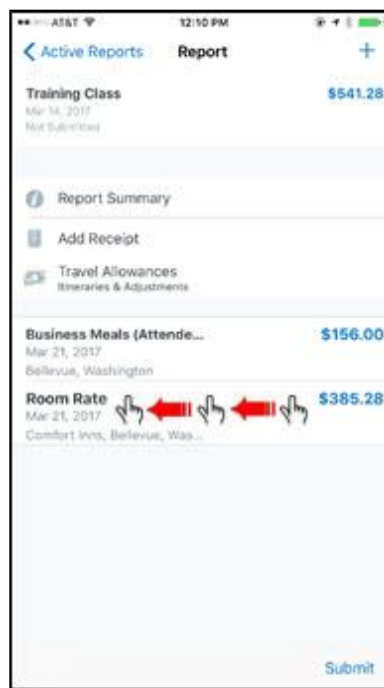
**NOTE:** If you delete a *mobile* expense or an expense created from a card transaction, it is not really deleted; it is moved back to the "pool" of expenses on the **Expenses** screen.

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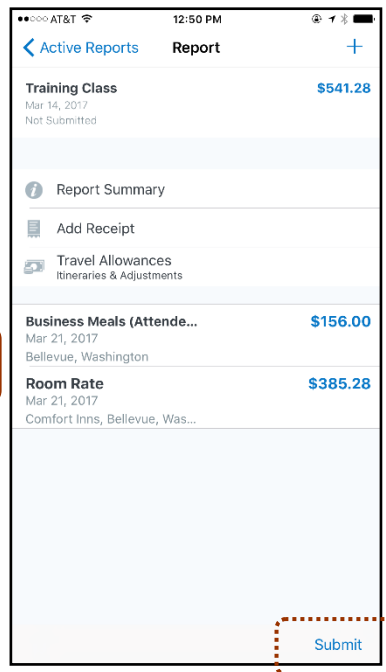
## Edit Report Header Information

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

> 1) On the **Report** screen, tap **Report Summary**.
> 2) On the **Report Summary** screen, make the desired changes.
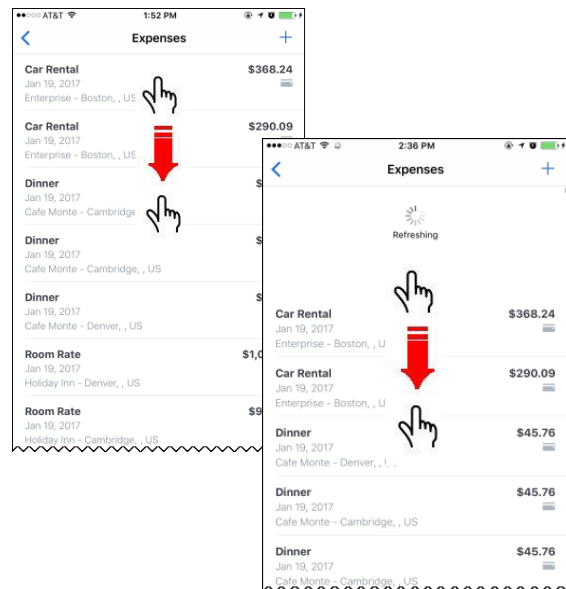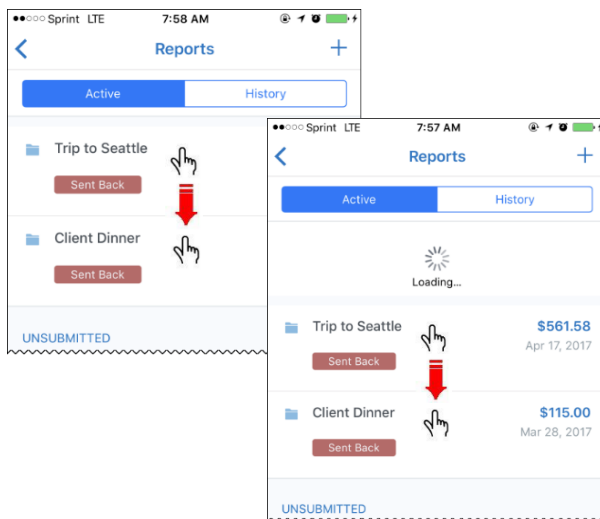> 3) Tap **Save** (upper-right corner).
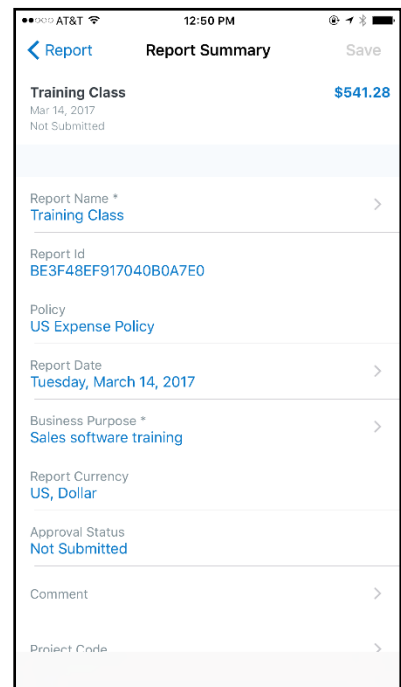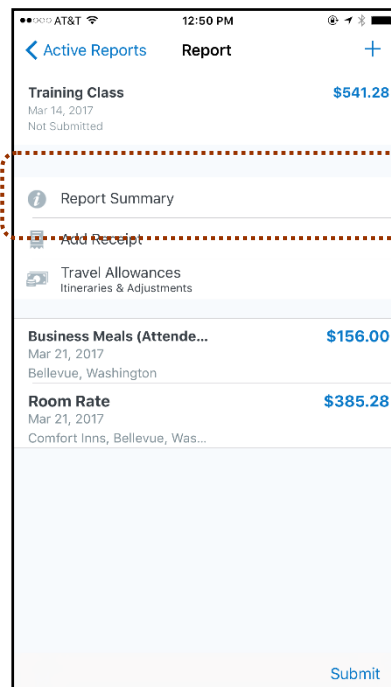
## Submit an Expense Report



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

## Refresh Data

To refresh data – for example, expenses and reports – pull down from the top.



## Delete an Unsubmitted Expense Report

1) On the **Reports** screen, tap **Active** and then swipe the desired report to the left. The **Delete** button appears.
2) Tap **Delete**.

**NOTE:** Expenses on the report that are related to card transactions are not really deleted – they are returned to the "pool" of card transactions. Cash transactions are truly deleted.
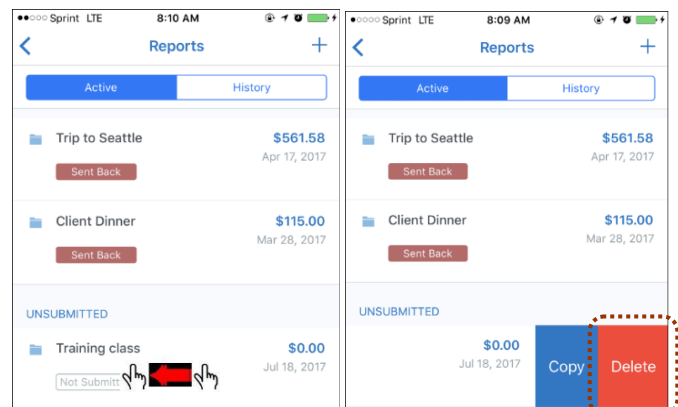
## View/Add/Edit/Delete Allocations

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 (R&D and Marketing at 50% each). Each equals $565.88 with a total of $1,131.76. ($1,131.76 = the airfare and hotel expense on the report.)

> 1) On the **Report** screen, tap **Allocation Summary**.
> 2) On the **Allocation Summary** screen:
>    - Review the information.
>    - Tap **Report** (upper-left corner) to return to the report.
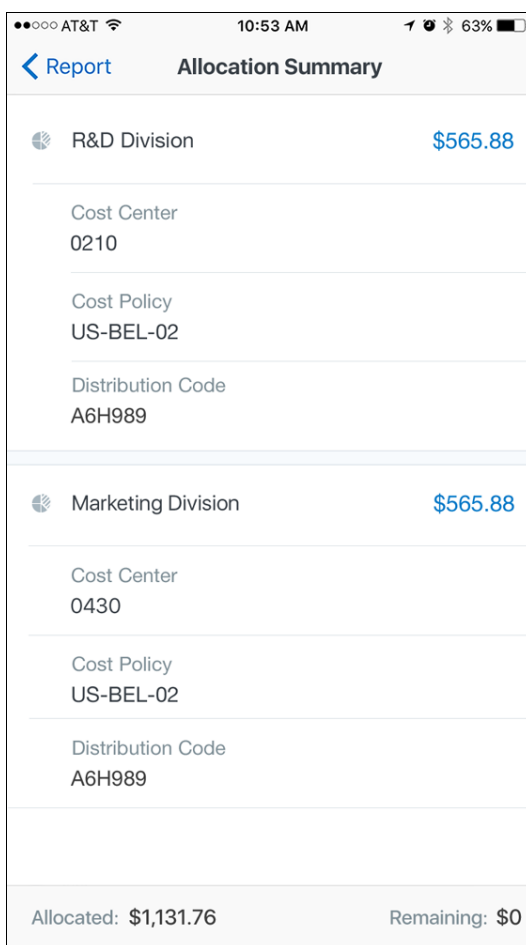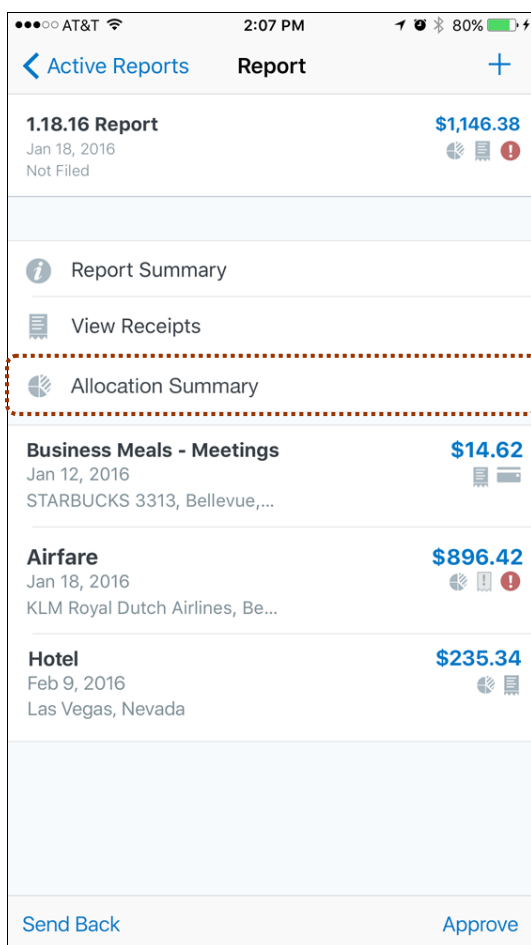
## VIEW EXPENSE-LEVEL ALLOCATIONS



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 **Report** (upper-left corner) to return to the report.
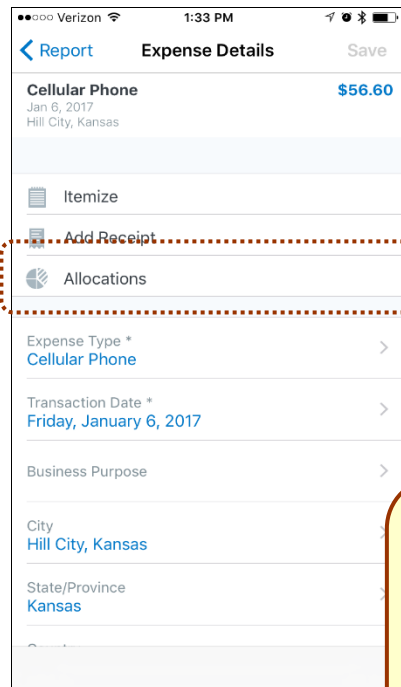
## VIEW ITEMIZATION-LEVEL ALLOCATIONS



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 (in this case) **Hotel** screen, tap **Allocations**.
5) On the **Allocations** screen:
- Review the information.
- Tap **Report** (upper-left corner) to return to the report.

## ADD/EDIT/DELETE ALLOCATIONS

1) To *add* allocations, on the **Expense Details** screen:
- Tap **Allocations**.
- Tap **New Allocation**.
- Fill in the fields (if any) and make the desired selections.
- Tap ⊞ (upper-right corner) to add additional allocations.

2) To *edit* an allocation, on the **Allocations** screen, tap the desired allocation to open it and then make the desired changes.
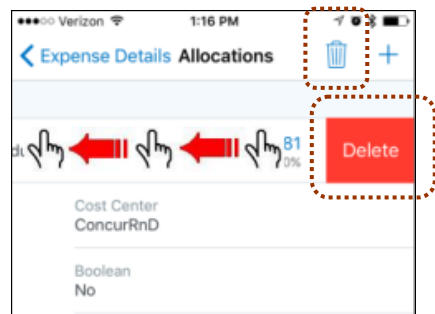
3) To *delete* an allocation, on the **Allocations** screen:
- Swipe left and tap **Delete**.
- Tap 🗑 to delete all allocations for an expense
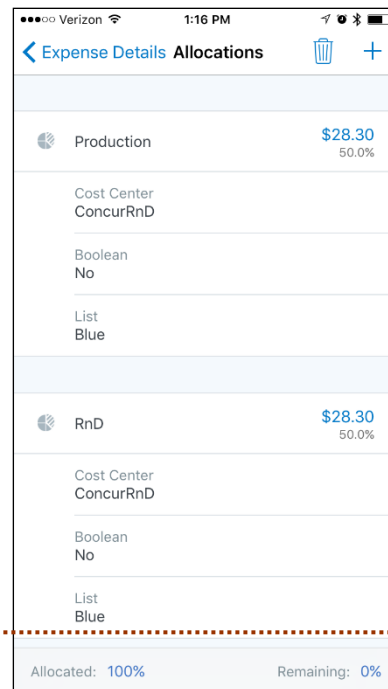
4) At the bottom of the **Allocations** screen, review the **Allocated** and **Remaining** percentages.

# 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.
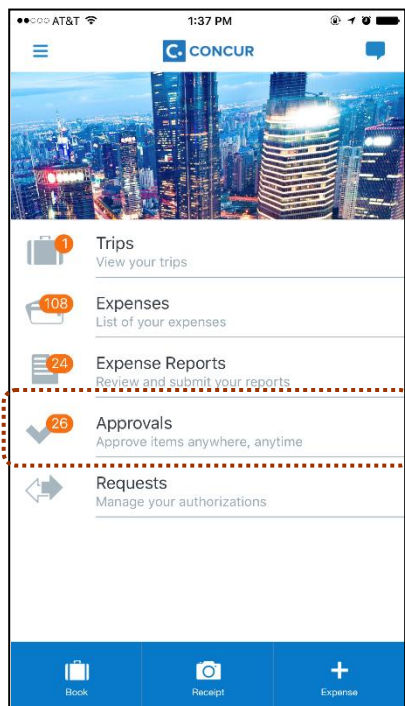   - Tap ⊞ (upper-right corner) to add additional allocations.

## ICON

Once items are allocated, an Allocation icon appears next to the expense and at the report level.

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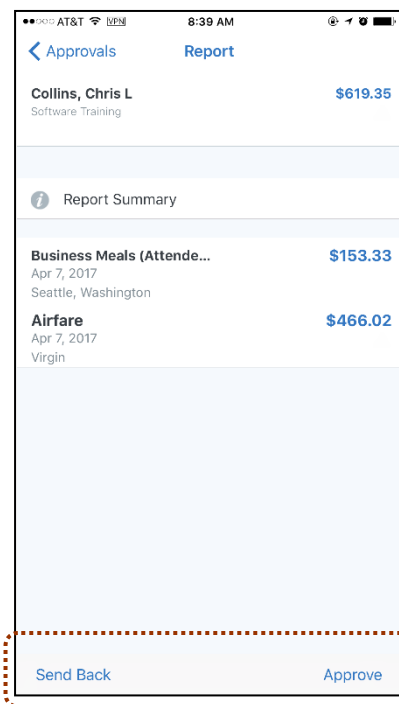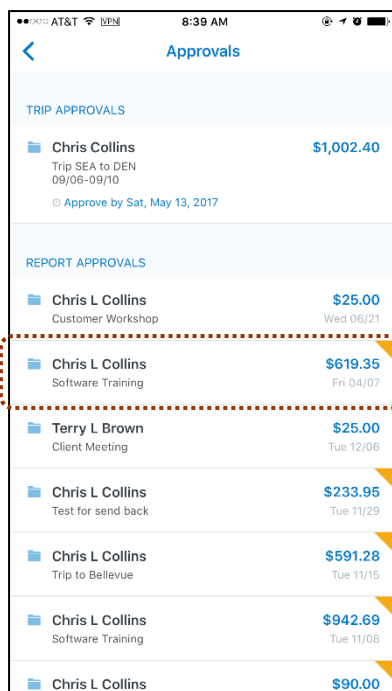
**NOTE:** Depending on your configuration, you may be able to bypass any remaining approvers and send the expense report directly to Accounting Review. If so, when you select **Approve**, this menu appears. Tap:

 **- 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.

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

For users with iPhone 6s and 6s Plus devices, the Concur mobile app provides these options for the 3D Touch.
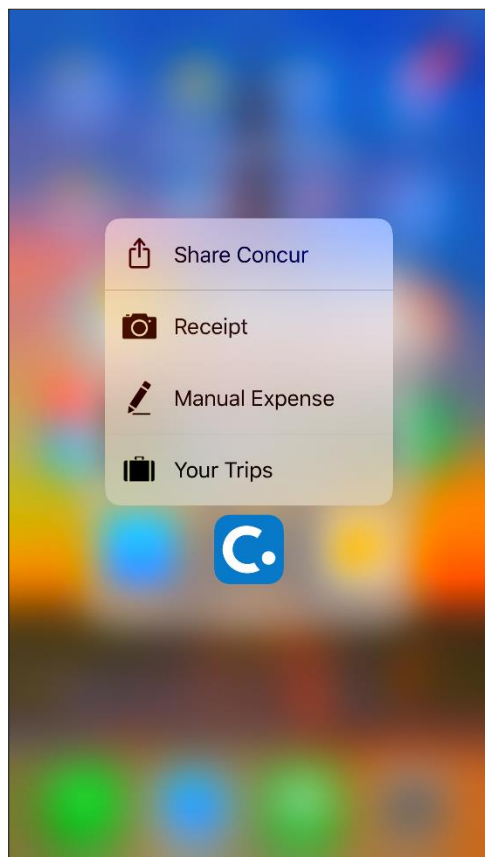
Press the Concur icon in the device's apps list, the menu appears.

Using the menu, you can share the Concur mobile app with friends, quickly take a picture of the receipt, create an expense manually, or view the current trip (if any).



Press an expense in the expense list (**Expenses** screen), the associated receipt appears.

A menu also appears so you can add the expense to a report or delete it from the device.
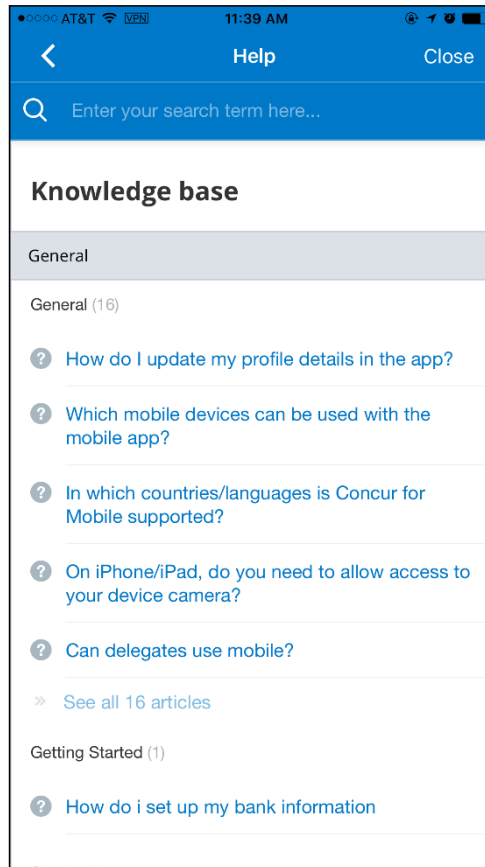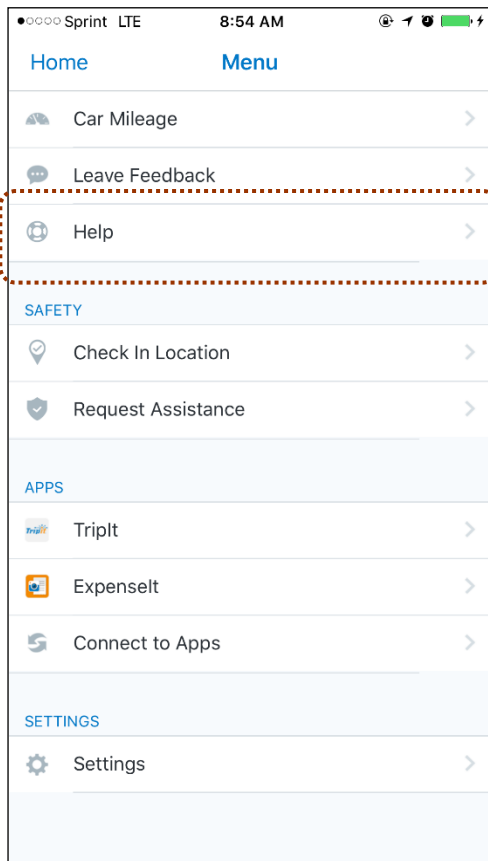
## Miscellaneous

### *Settings*

Use settings for the following:

- Save your user name
- Automatically sign in
- Turn on Touch ID
- Send an error log to Concur
- Clear the cache
- Reset to the factory defaults
- Sign out
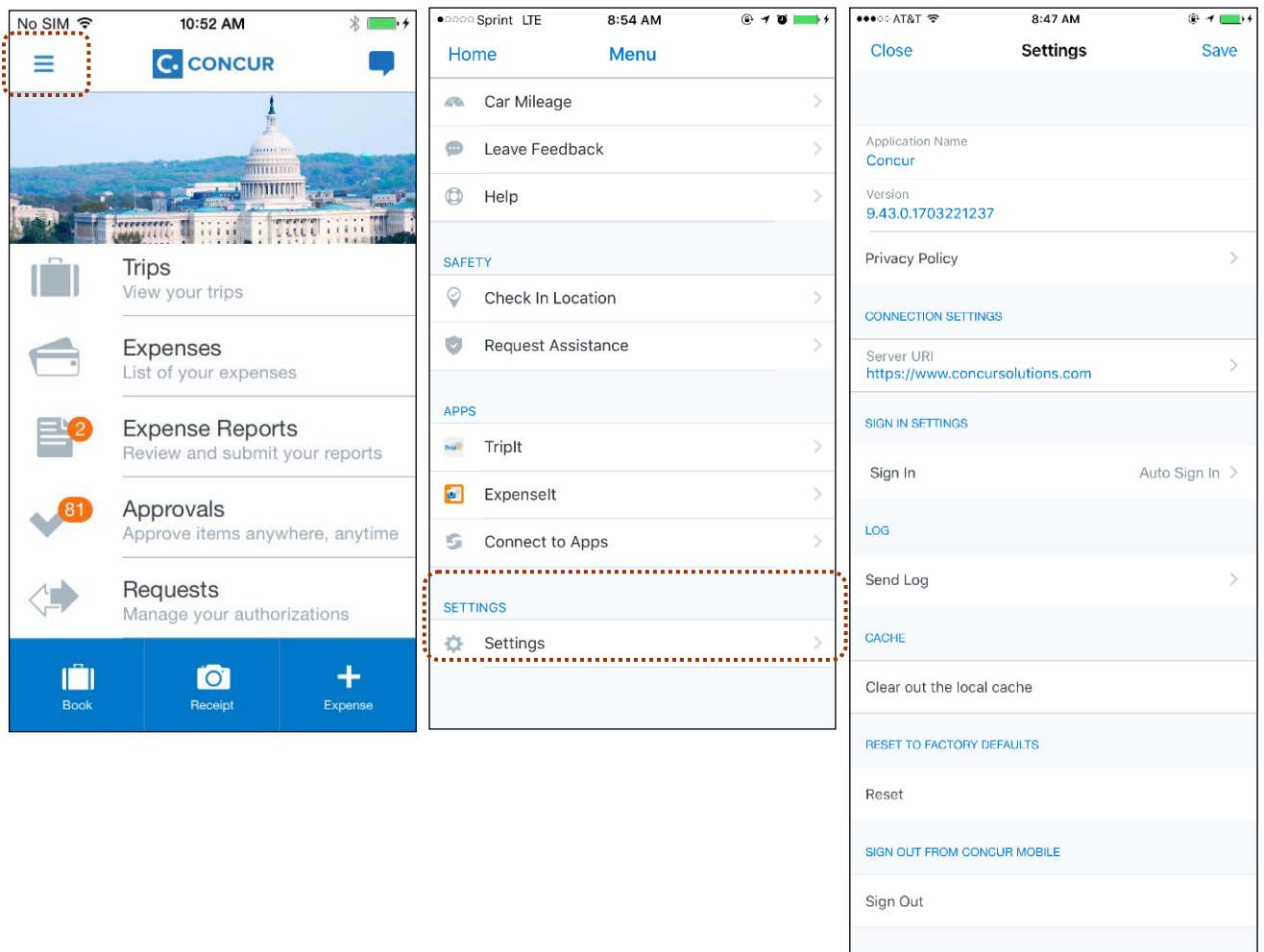
## *Get Help*

Use **Help** on the **Menu** screen to search for help topics or find helpful articles.

## *Leave Feedback*

Use **Leave Feedback** on the **Menu** screen to send feedback.