Introduction to Concur Mobile for TTE - Android
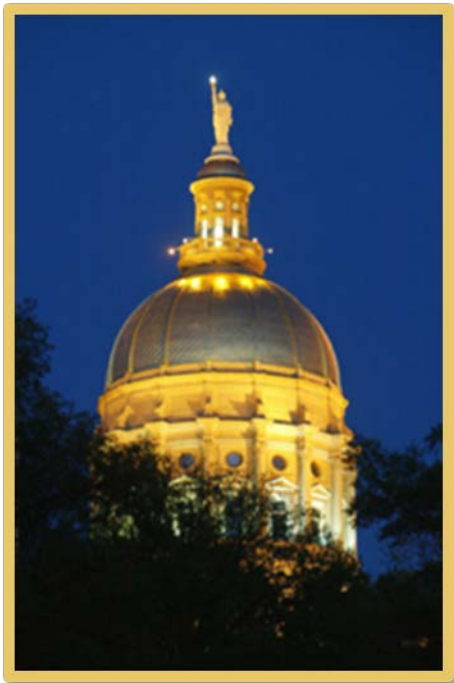
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Download

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 agency's configuration, you can use the same login credentials that you use for the web version of Concur, or you can use a PIN (mobile-only password) that you created with this page.

Log In

Tap in your device apps list. Then, on the **Sign In** screen, enter your User Name (used in the web version). Tap **Continue**. On the next screen, enter your password and tap **Sign In to Concur**.

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.
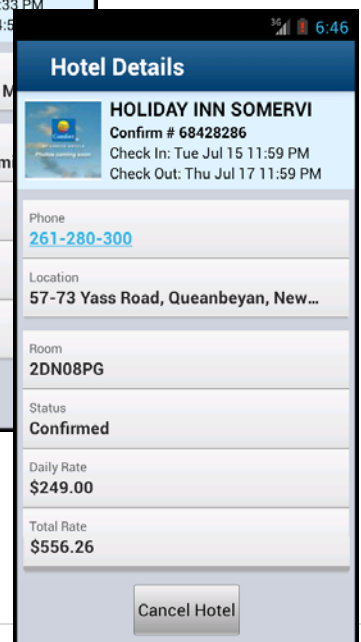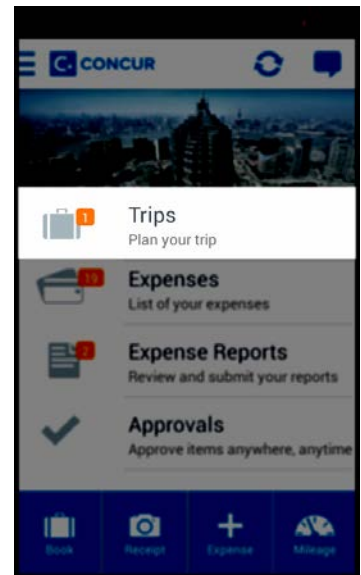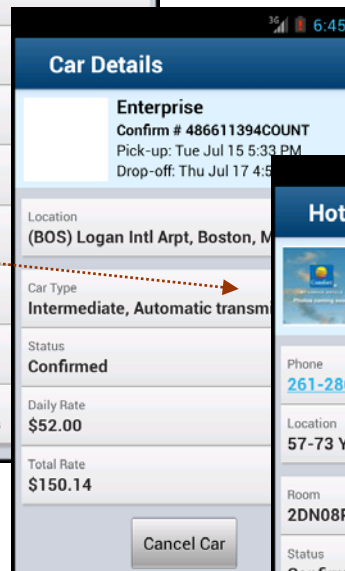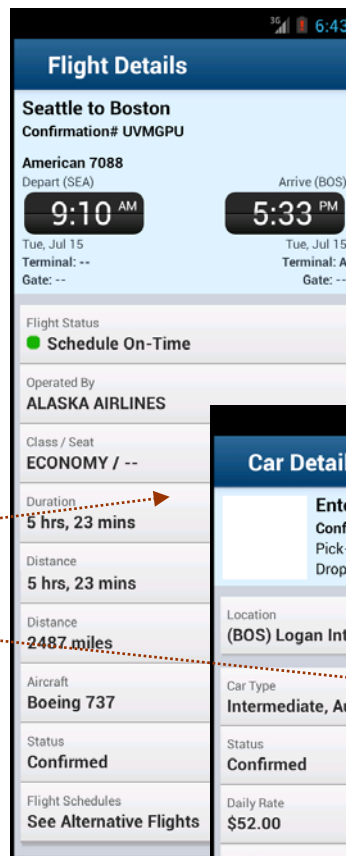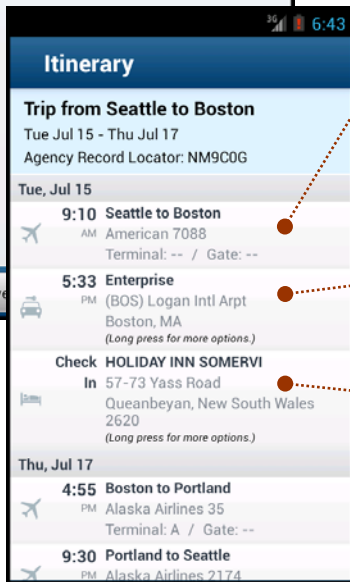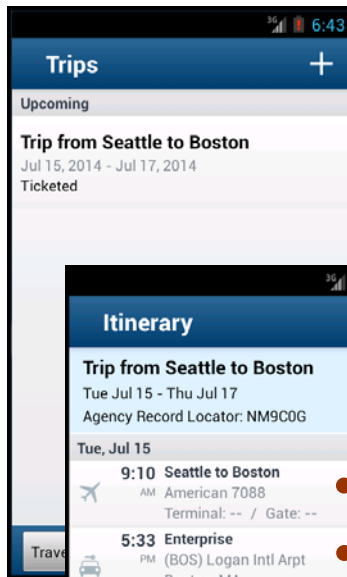
Book a Flight

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.

Select an Action
Book a Flight 🎤
Book a Hotel 🎤
Book a Car 🎤
Book Rail
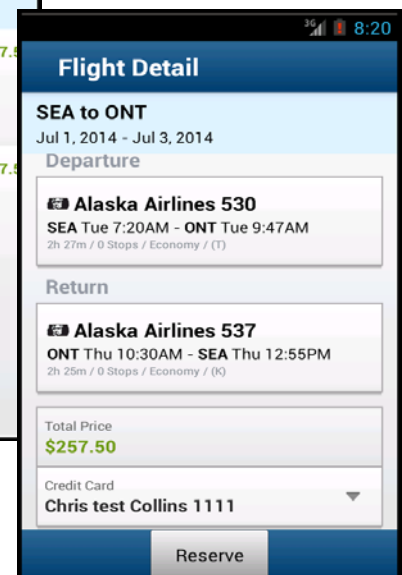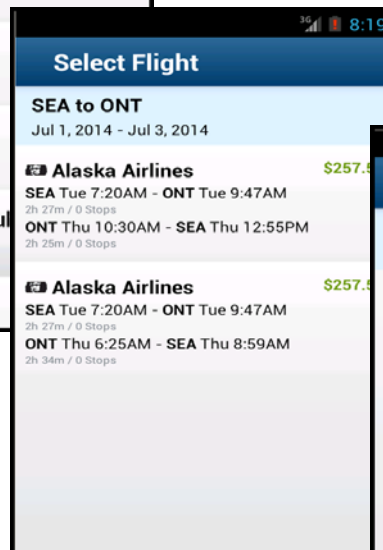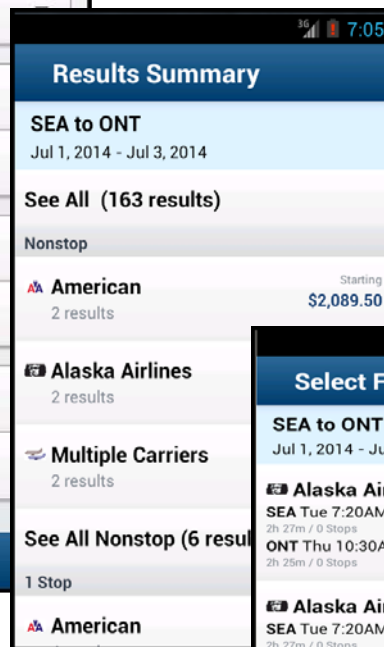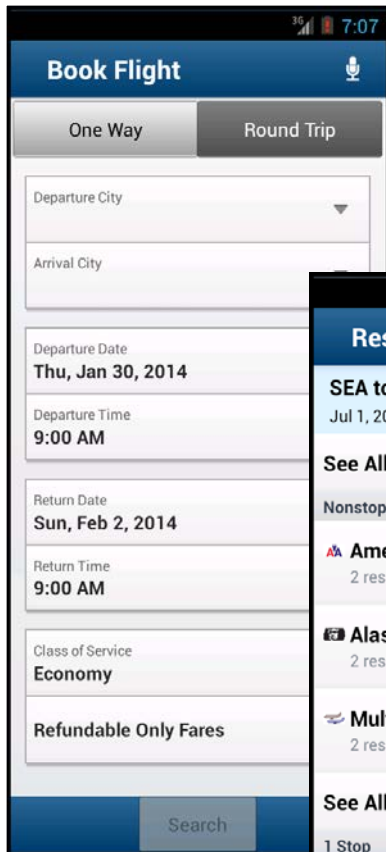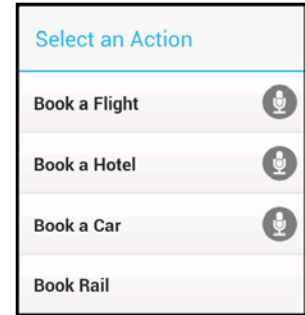
1) On the **Book Flight** screen:
   - Tap **One Way** or **Round Trip**.
   - Enter the search criteria.
   - Tap **Search**.
2) On the **Results Summary** screen, tap the desired carrier.
3) On the **Select Flight** screen, tap the desired flight.
4) On the **Flight Detail** screen:
   - Review for 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 [icon] (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 [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   🎤   ³ᴳ 🔋 6:57

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   **$45.00** ▼
Unlimited Miles   per day

Economy Car
Automatic transmission
Air conditioning   **$52.70** ▼
Unlimited Miles   per day

Economy Car
Automatic transmission
Air conditioning   **$56.87** ▼
Unlimited Miles   per day

Economy Four Door Car
Automatic transmission
Air conditioning   **$56.87** ▼
Unlimited Miles   per day

Economy Car
Automatic transmission
Air conditioning   **$61.75** ▼

22 Results

Car Details   ³ᴳ 🔋 6:58

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]
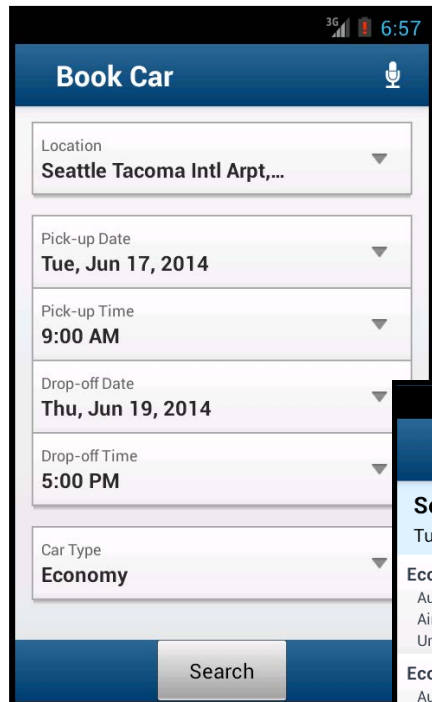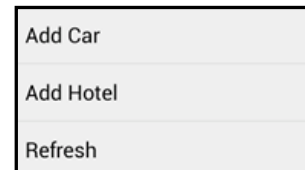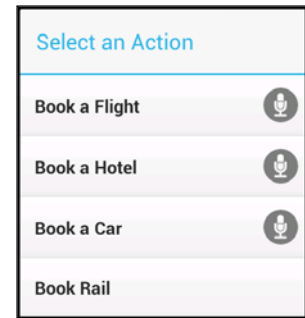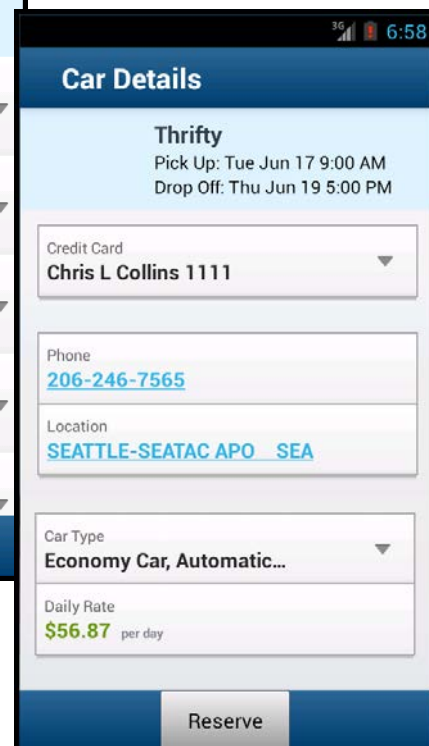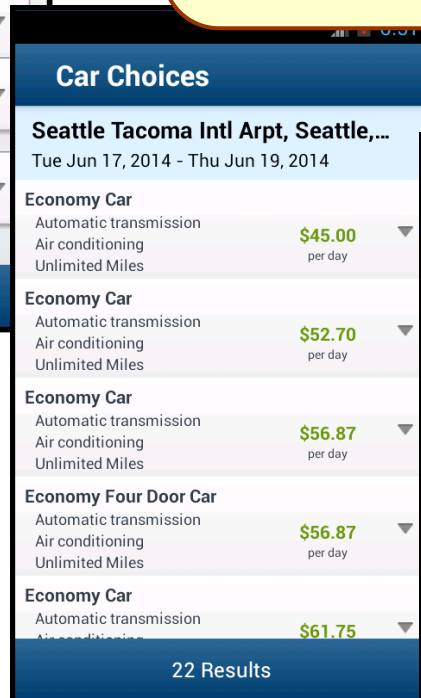
Book a Hotel

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**.

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

Tap here for images

Tap here for amenities, cancellation info, etc.

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.

Car Details

Thrifty
Confirm # FZNQS1
Pick-up: Tue Jun 17 9:00 AM
Drop-off: Thu Jun 19 5:00 PM

Location
(SEA) Seattle Tacoma Intl Arpt, Seattle,...

Car Type
Economy, Automatic transmission, Air...

Status
Confirmed

Daily Rate
$56.87

Total Rate
$243.59

Cancel Car

Itinerary

Car Reservation at SEATTLE
Tue Jun 17 - Thu Jun 19
Agency Record Locator: ZSKVN4

Tue, Jun 17
9:00 Thrifty
AM (SEA) Seattle Tacoma Intl Seattle, WA
(Long press for more options.)

Car Reservation at SEATTLE
Tue Jun 17 - Thu Jun 19
Agency Record Locator: ZSKVN4

Tue, Jun 17
9:00 Thrifty

Trip Car Action

Cancel Car

View Details

Method #1:
1) On the itinerary, *long press* the reservation.
2) Tap **Cancel Car**.

Method #2:
1) On the itinerary, open the car reservation.
2) Tap **Cancel Car**.

Cancel a Hotel Reservation

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

Hotel Details

Travelodge
Confirm # 65056698
Check In: Tue Jun 17 11:59 PM
Check Out: Thu Jun 19 11:59 PM

Phone
360-423-6460

Location
838 15th Ave, Longview, Washington...

Room
NQ1SDI

Status
Confirmed

Daily Rate
$51.00

Total Rate
$112.10

Cancellation Policy
TO AVOID BEING BILLED CANCEL BY 4:...

Cancel Hotel

Itinerary

Hotel Reservation at Longview
Tue Jun 17 - Thu Jun 19
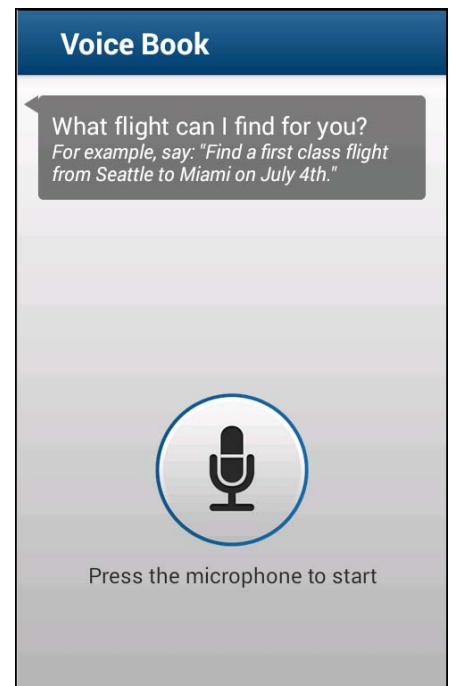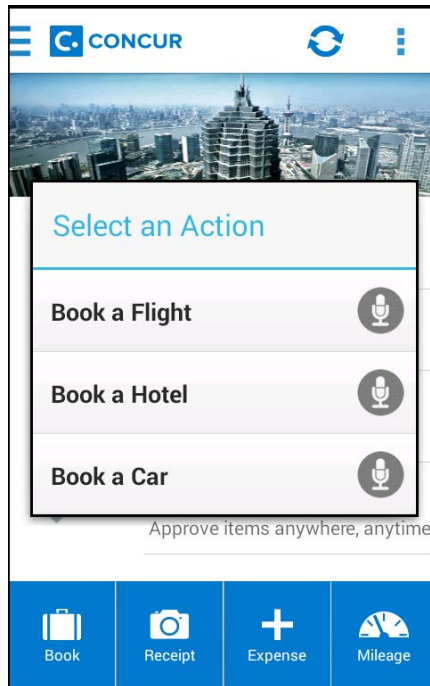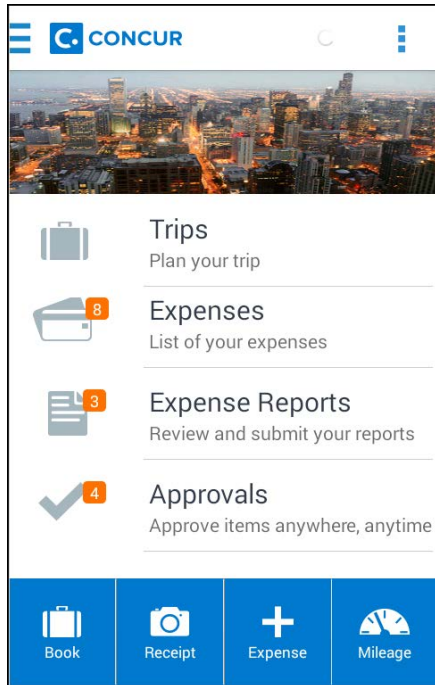Agency Record Locator: Q8KQKA

Tue, Jun 17
Check Travelodge
In 838 15th Ave
Longview, Washington 98632
(Long press for more options.)

Hotel Reservation at Longview
Tue Jun 17 - Thu Jun 19
Agency Record Locator: Q8KQKA

Tue, Jun 17
Check Travelodge

Trip Hotel Action

Cancel Hotel

View Details

Method #1:
1) On the itinerary, *long press* the reservation.
2) Tap **Cancel Hotel**.

Method #2:
1) On the itinerary, open the hotel reservation.
2) Tap **Cancel Hotel**.

View Agency Information

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

Use Taxi Magic, Gate Guru, and TripIt

Depending on your company's configuration, Taxi Magic, Gate Guru, and TripIt may be available for download via the home screen.
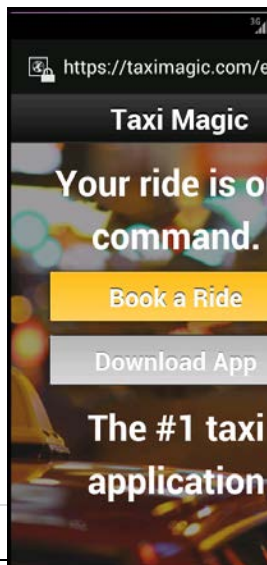
▣ Expenses and ▤ Expense Reports

Expense List (Expenses Screen)

On the home screen, tap **Expenses** to access your list of expenses. Use the **Expenses** screen to:

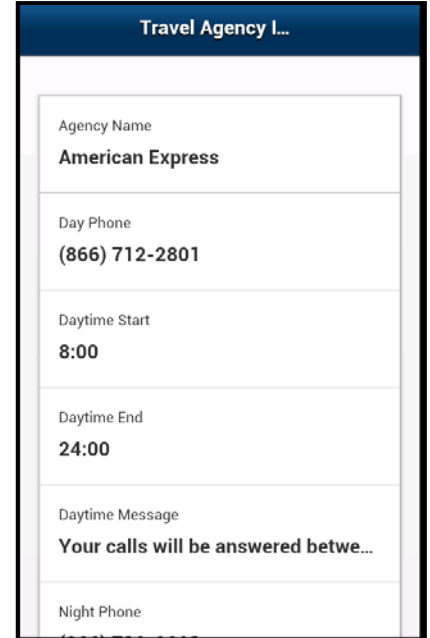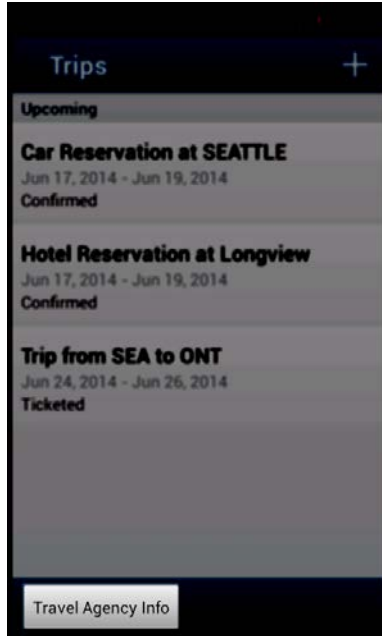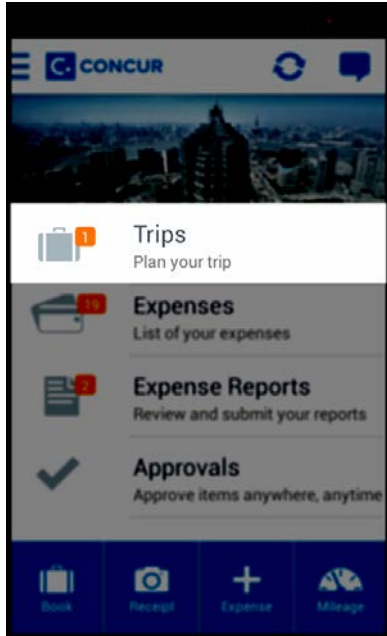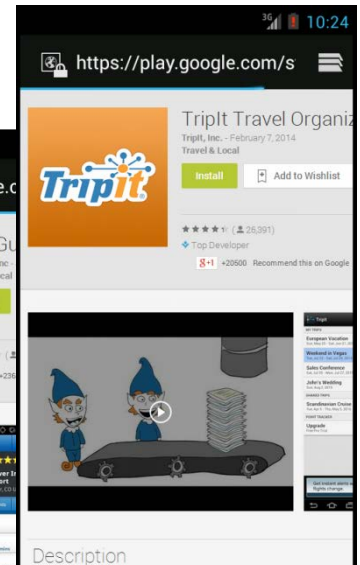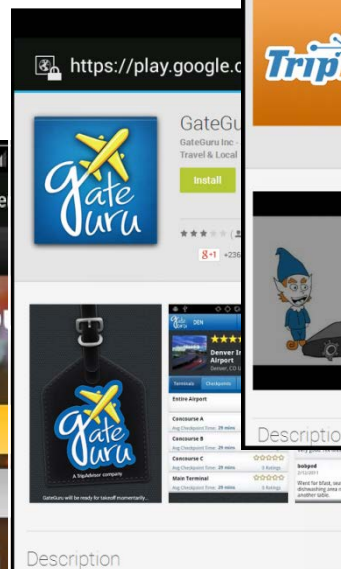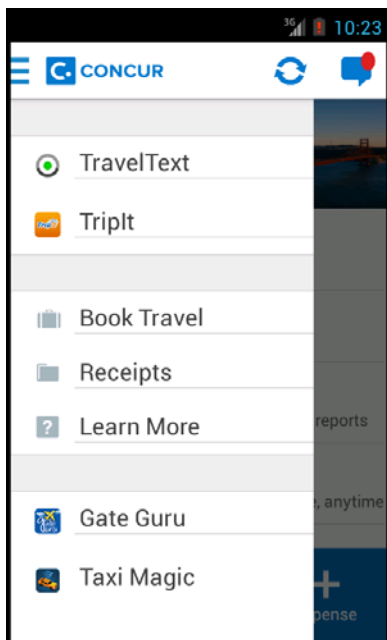- Add, view, edit, and delete *mobile* expenses. Mobile expenses are designed to be quick and easy.
    - ♦ To make more extensive features like itemizations and attendees, either:
        - Add the *mobile* expense to an expense report then edit.
        - Create the expense on an open expense report and then edit.
    - ♦ For car mileage 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.
- Attach expenses – both *mobile* expenses and card transactions – to a new or existing expense report.
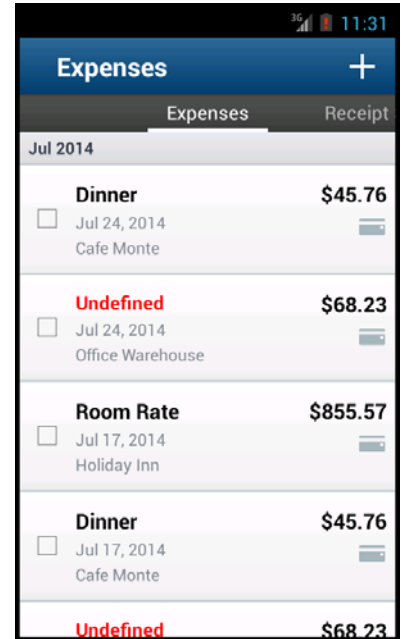
Expense Report List (Reports Screen)

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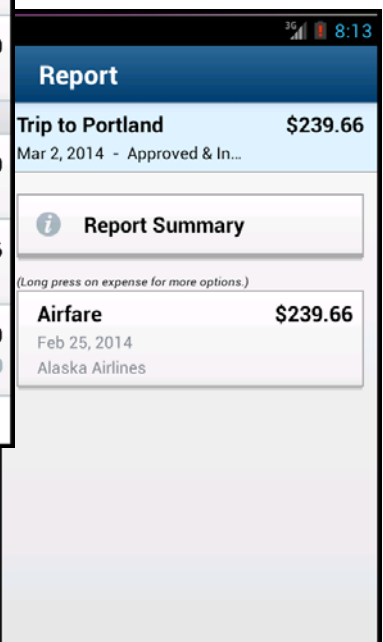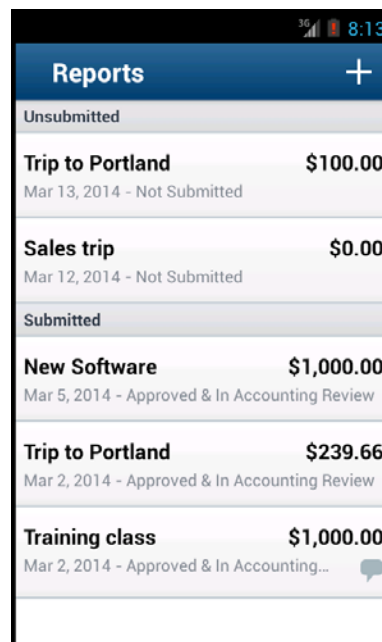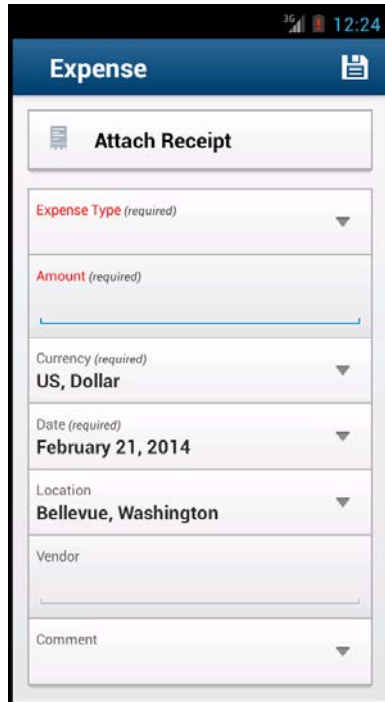
All active reports are separated into **Unsubmitted**, **Submitted**, and **Other** sections. Within each category, the reports are sorted by report date.

Create a Mobile Expense

To create a *mobile* expense:

- On the home screen, tap [+ Expense].
  – 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.
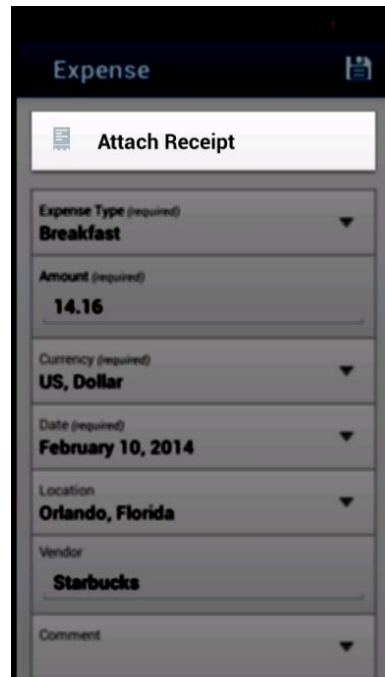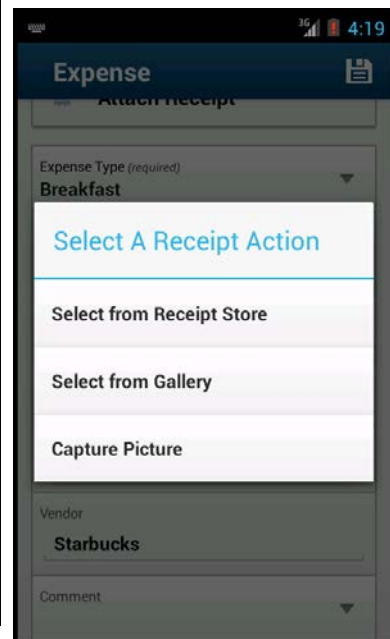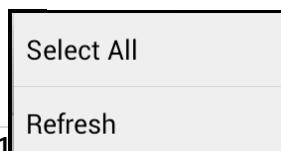
Delete an Expense from the Expenses Screen

You can delete a *mobile* expense from the **Expenses** screen.
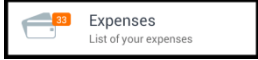
NOTE: To delete a *card* transaction, use the web version of Expense - if your company allows you to delete card transactions.
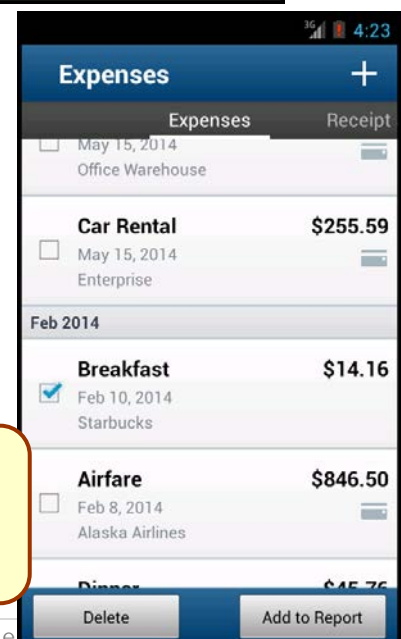
To refresh the list, tap the menu [MENU] button. Then…

Select All

Refresh

1) On the **Expenses** screen, tap one or more check boxes.
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)
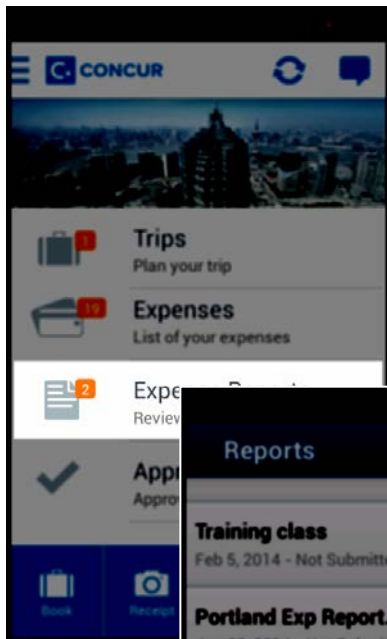
1) On the home screen, tap **Expense Reports**.
2) On the **Reports** screen, tap ➕.
3) On the **New Report** screen:
   - Concur provides a report name. Change it if desired.
   - Fill in the fields and make the desired selections.
   - Tap 💾 to save.
4) On the **Report** screen, enter your expenses, attach receipts, etc. (described on the following pages). Meals Per Diem (Travel Allowances) cannot be added on Concur Mobile.
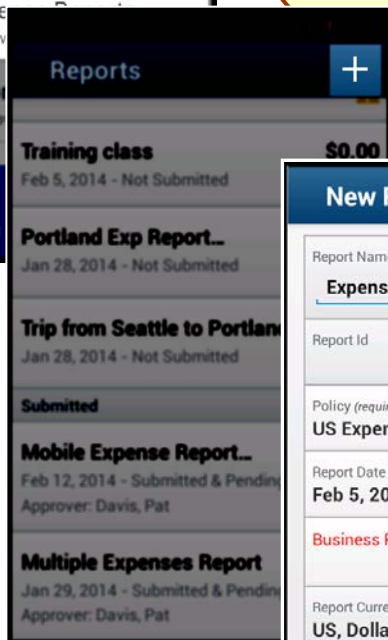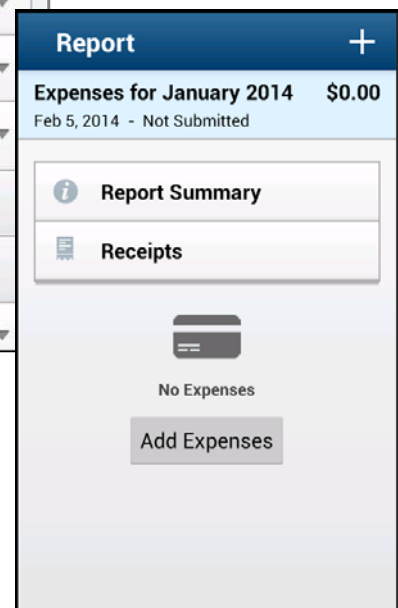
Move Expenses from the Expenses Screen to an Expense Report

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 (MENU) button. Then...

Select All
Refresh
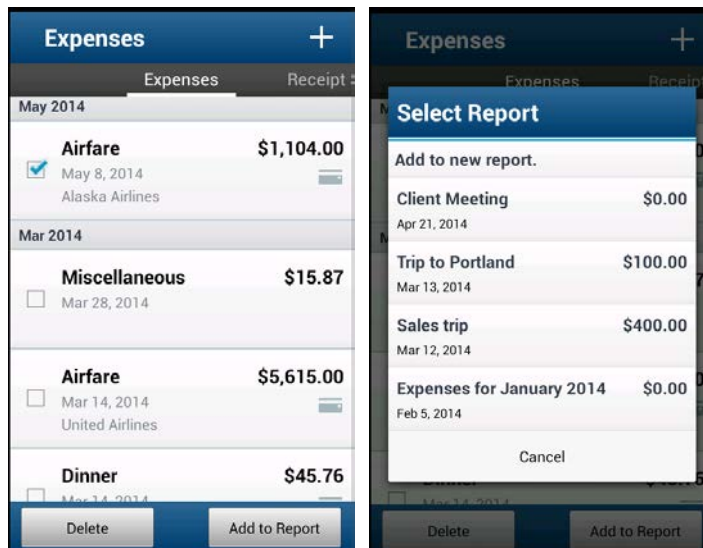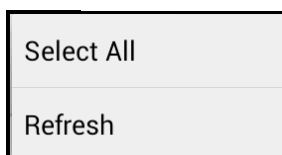
Create an Expense with an Open Expense Report

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.
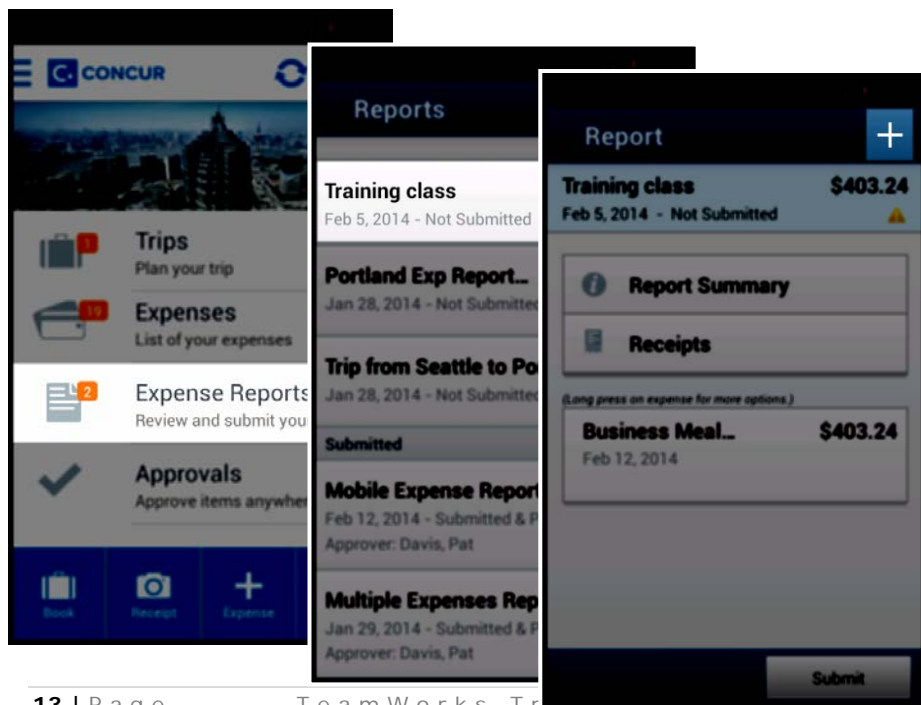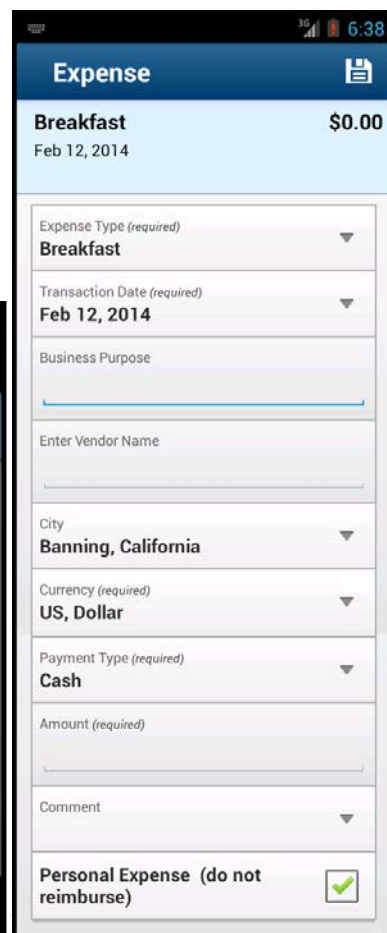
Meals Per Diem/Travel Allowance –cannot be added on Concur Mobile.

Add a Car Mileage Expense

1) On the home screen, tap [Mileage].
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. Rate is determined by the Vehicle ID.
   - Tap [icon] to save.
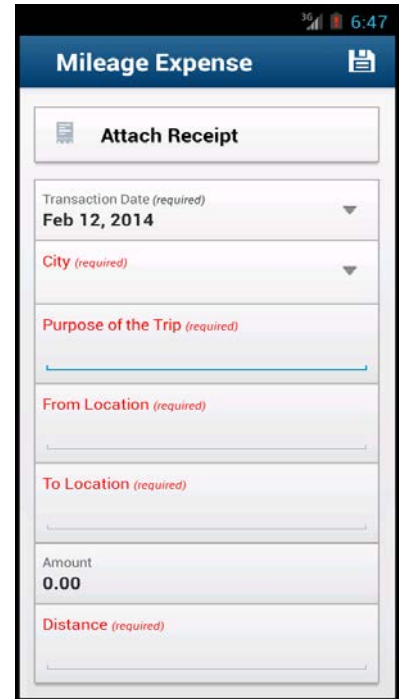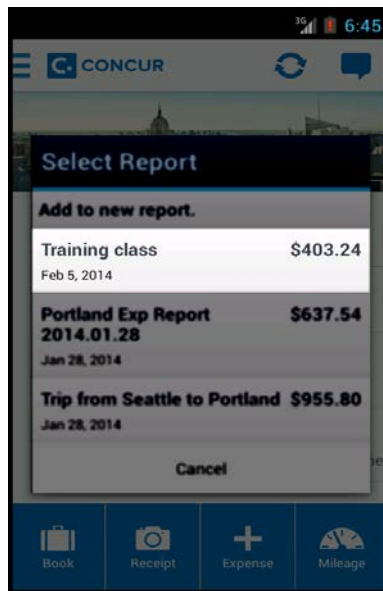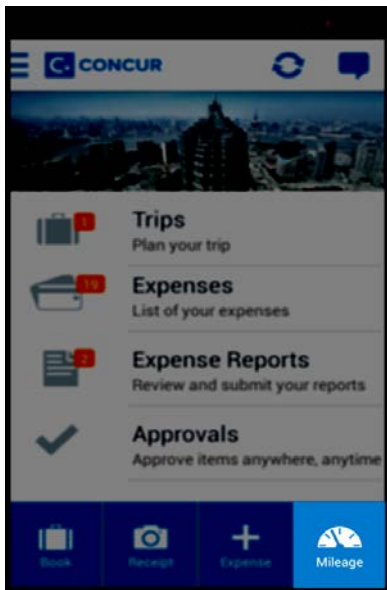
Edit an Expense on an Expense Report

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

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 [icon] to save.

Itemize an Expense

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

Report

Trip to Portland — $376.29
Mar 13, 2014 - Not Submitted ⚠

ℹ Report S...

🖫 Receipts

(Long press on expense for...)

Room Rate
Feb 24, 2014
Holiday Inn

Expense 🖫

Room Rate — $376.29
Feb 24, 2014 ⚠
Holiday Inn

📋 Itemization (0)

🖫 Attach Receipt

⚠ Itemizations are re...
entry.

Expense Type *(required)*
Room Rate

Transaction Date *(required)*
Feb 24, 2014

Business Purpose
room while training

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

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

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.
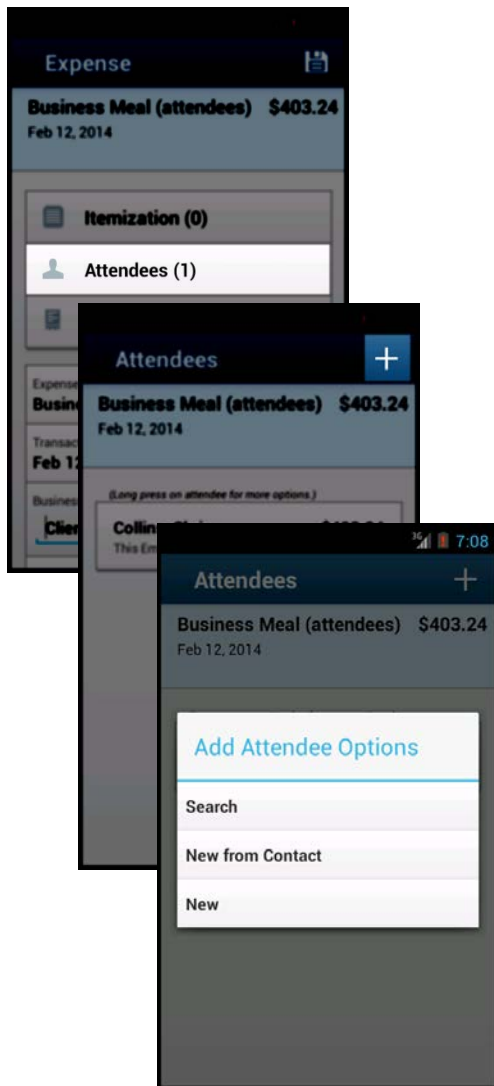
1) On the report, tap to open the desired expense.
2) On the **Expense** screen, tap **Attendees**.
3) On the **Attendees** screen, tap ➕ to add.
4) On the **Add Attendee Options** menu, tap one of the following:
   - **Search** > **Advanced** to search your company's list of attendees or from an external 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
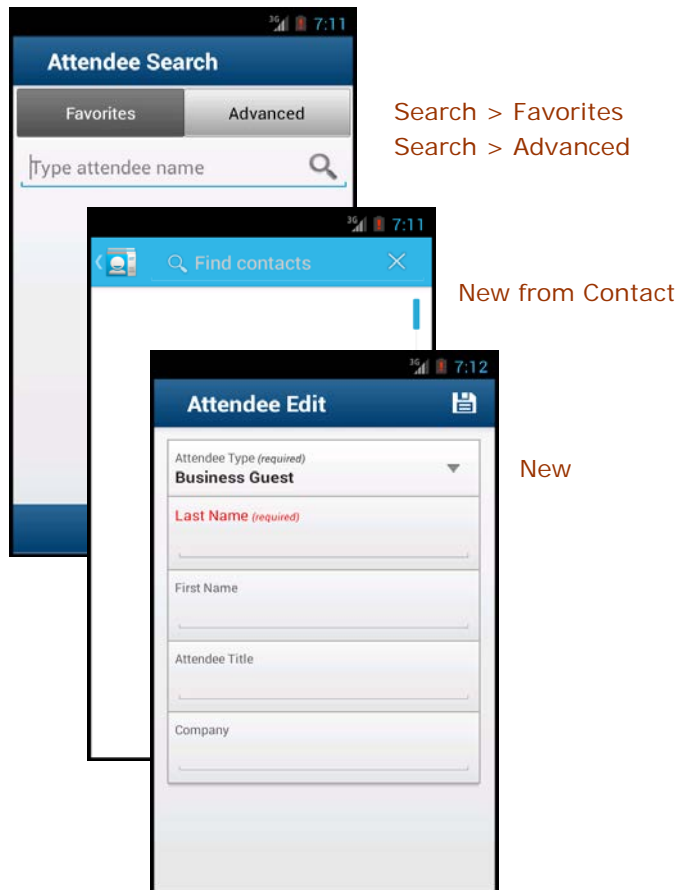
Work with Receipts

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

Select A Receipt Action

Select from Receipt Store

Select from Gallery

Capture Picture

1) On the **Report** screen, tap **Receipts**.
   - or –
   On the **Expense** screen, tap **Attach Receipt**.
2) On the **Select A Receipt Action** menu, tap:
   - **Select from Receipt Store** to select an image in your Concur Receipt Store
   - **Select from Gallery** to select an image in your device gallery
   - **Capture Picture** to use your device camera

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**.

Expense Entry Action

View Details

Remove From Report

Capture Receipt Picture

Select Gallery Receipt

Select from Receipt Store

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.

✓ Approvers

Trips

Use **Approvals** on the home screen to view and approve trips (if you are a trip approver).
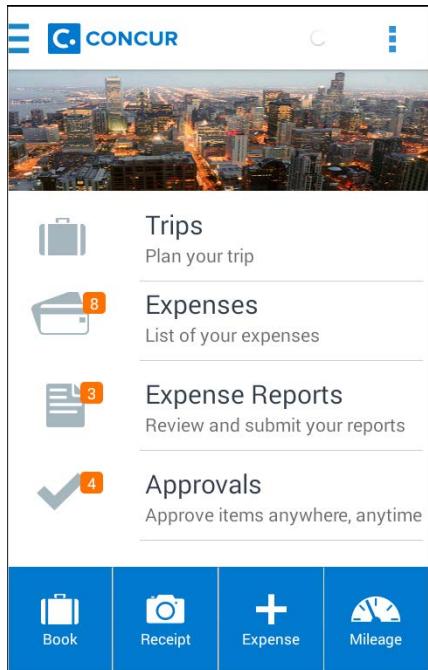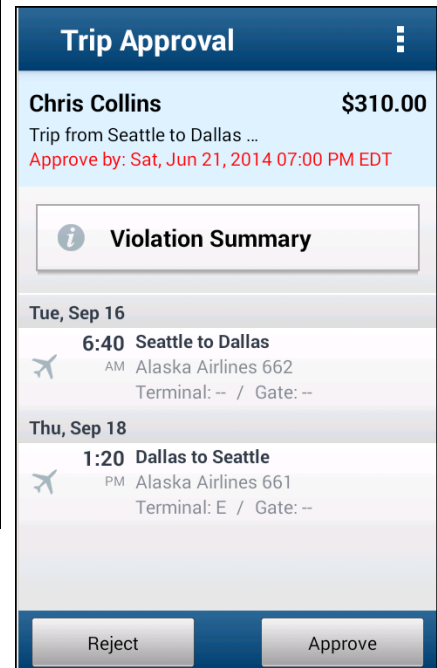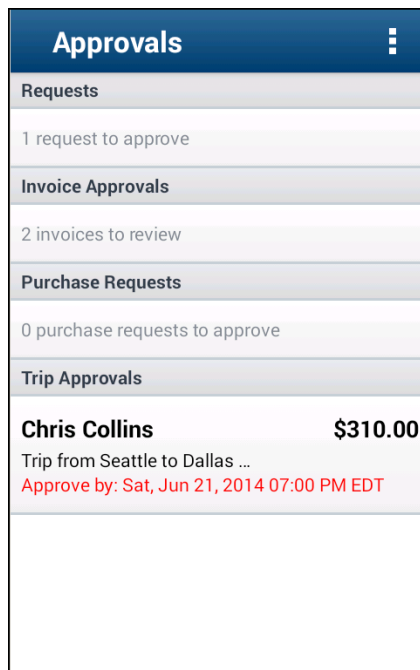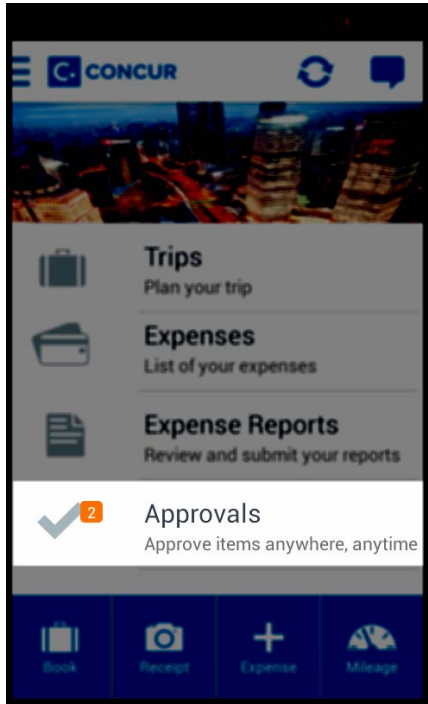
1) On the home screen, tap **Approvals**.
2) On the **Approvals** screen, tap to open the desired trip.
3) On the **Trip Approval** screen:
   - View the report details (segments, violations, etc.).
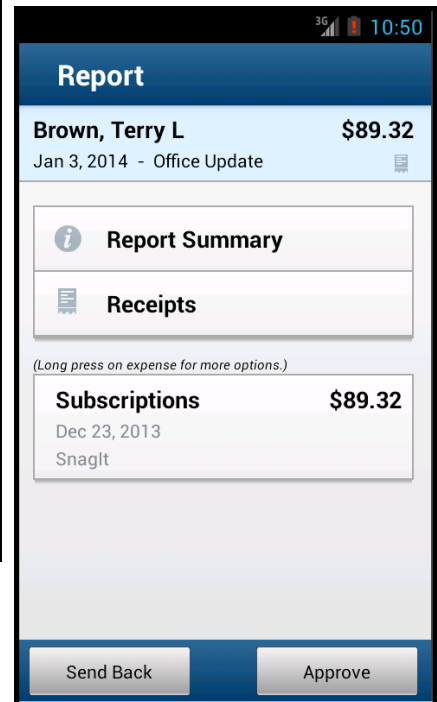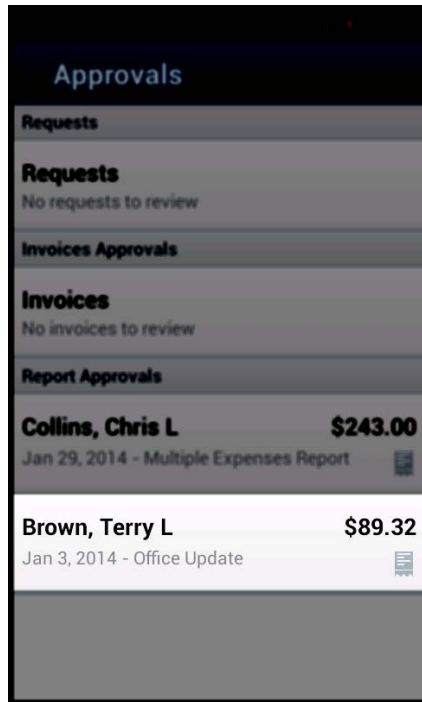   - Tap **Approve** or **Reject**.

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:
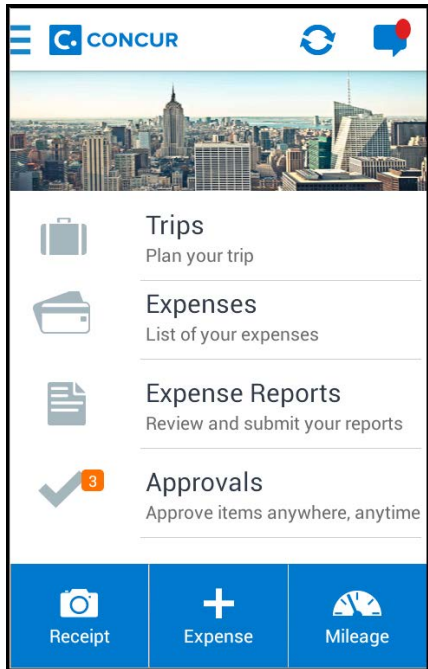

Additional approver required to approve the report and send the report to the next approver in the workflow.

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**.
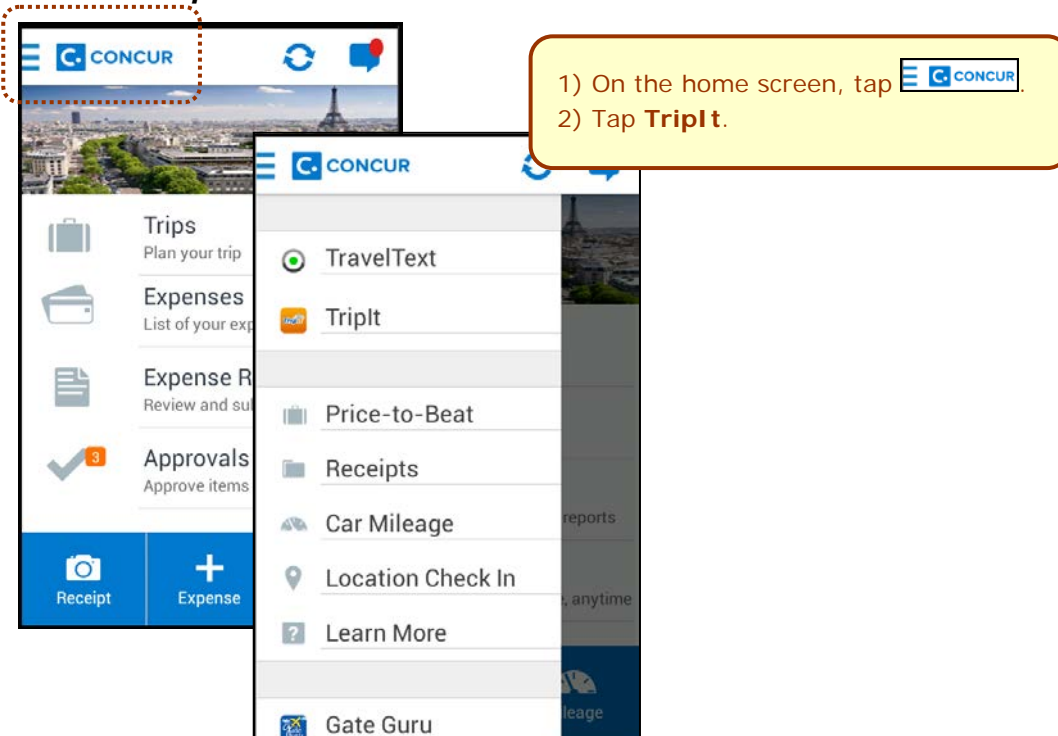   **NOTE:** If you send back, you must provide a comment.
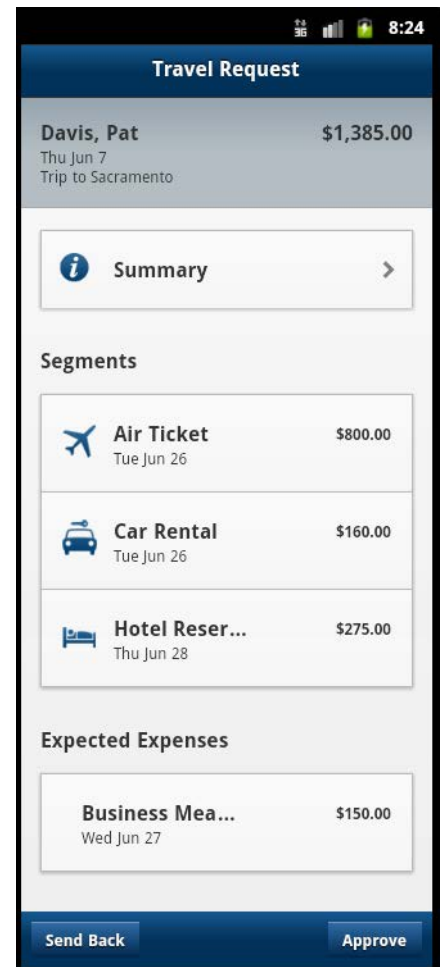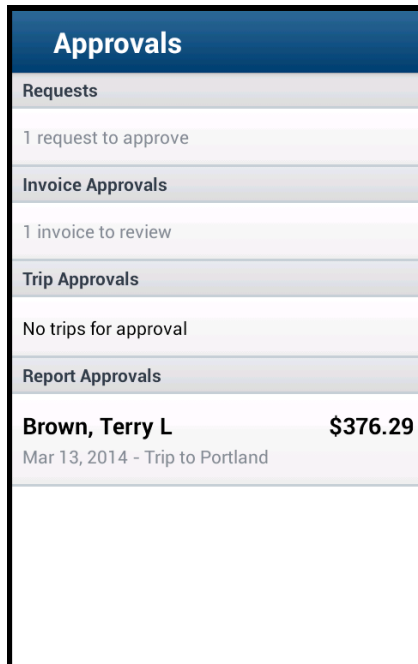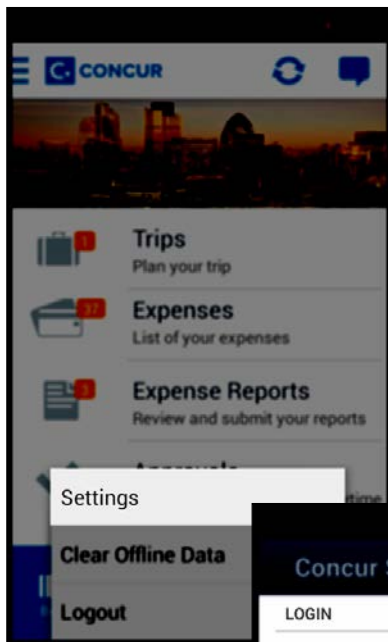
Miscellaneous

Access Locate & Alert

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

1) On the home screen, tap [CONCUR icon].
2) Tap **Location Check In**.

Access TripIt
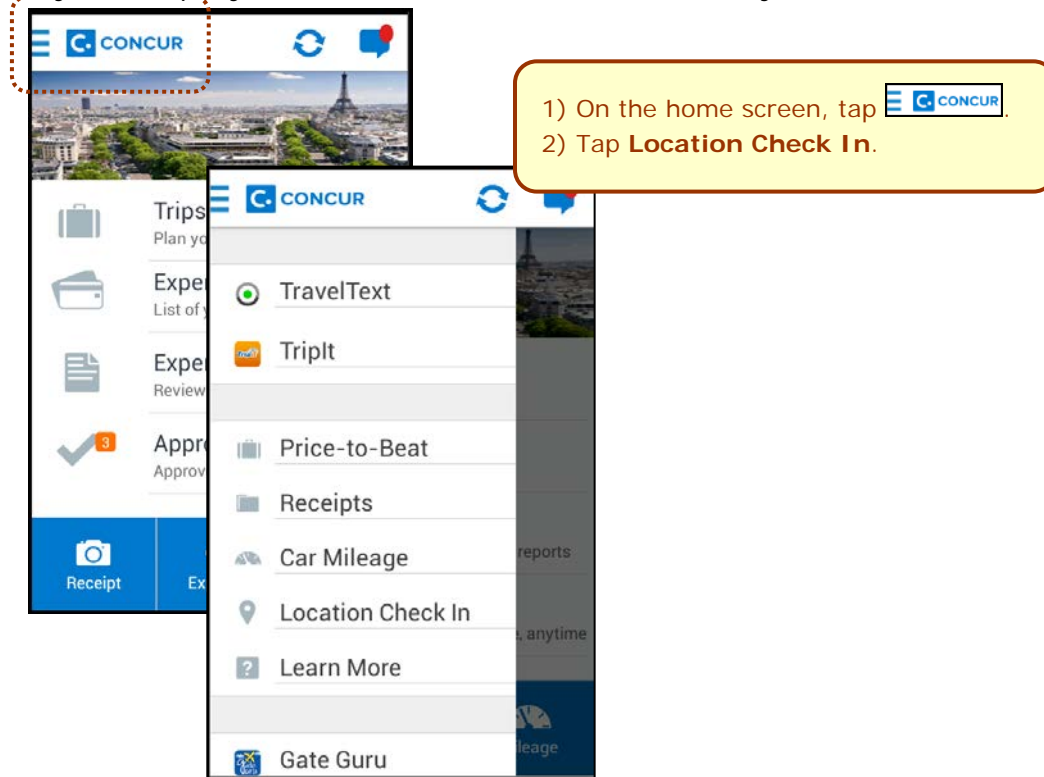
1) On the home screen, tap [CONCUR icon].
2) Tap **TripIt**.

Save Login ID and Auto Login

1) On the home screen, tap [MENU].
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.