

## Approving Travel Documents in Concur (Mobile Version)

### How to Download the Concur App and login the first time:

1. Make sure that you have logged into Concur on the web browser first! This will allow you to set your Concur password. Please review the login instructions in the approval instructions for the web version.
2. Open the app store on your phone.
3. Search for Concur.
4. Select and download the “SAP Concur” app. The symbol is a white C in a blue background.
5. Login with your e-mail address as the login name and your Concur password that you set up in the web-based version.
6. After the first login, you will be automatically logged in when you open the app.

### How to Approve Requests in the Mobile App:

1. Open the app on your phone or tablet.
2. Click on the term “Approvals”
3. Concur will take you to a list of documents to approve. The app will list Expense Reports first, so you will need to scroll down to find the Request Documents. If there are several documents, you may have to click on the term “Request Approvals” to get to the list of Request documents.
4. Click on the name of the document that you want to approve.
  - a. Click on the summary field to see the trip name, the dates of travel, the trip purpose, the destination, and funding source, and any advance information. Please note that the funding source lists the name of the fund, organization code, and the program code, but not the numerical code. For example, and Organization Code field for Biology would say “Biological Sciences”, not “259201”.
  - b. Click “Back” to return to the document’s main screen, then scroll down on your screen to see a breakdown of all of the expenses.
    - i. You could see several icons on this screen
      1. A yellow triangle is information for you to know, like the fact that there is a memo required for airfare requested 14 days or less before travel, or that an advance is part of the request.
      2. A blue message bubble means that there is a comment. Click on the icon to bring up the comment for you to read.
      3. A pie chart icon means that the expense has been allocated between two or more FOAP’s. Click on the icon to see how the expense is being charged.
    - c. If you need to see any attachments, click on the “Attachments” field.
    - d. If you are ready to approve, click “Approve”.
    - e. If you do not approve of the document, click on “Send Back”.
5. Concur will bring you back to the list of documents pending your approval. Choose the next document and repeat step 4 until all documents are approved.
6. Once you have completed all of the documents, close the app.

## How to Approve Expense Reports in the Mobile App:

1. Open the app on your phone or tablet.
2. Click on the term “Approvals”
3. Concur will take you to a list of documents to approve.
4. Click on the name of the document that you want to approve.
  - a. Click on the summary field to see the trip name, the dates of travel, the trip purpose, and the funding source. Please note that the funding source lists the name of the fund, organization code, and the program code, but not the numerical code. For example, and Organization Code field for Biology would say “Biological Sciences”, not “259201”.
  - b. Click “Back” to return to the document’s main screen, then scroll down on your screen to see a breakdown of all of the expenses.
    - i. You could see several icons on this screen
      1. A yellow triangle is information for you to know, like the fact that there is a memo required for airfare requested 14 days or less before travel, or that an advance is part of the request.
      2. A blue message bubble means that there is a comment. Click on the icon to bring up the comment for you to read.
      3. A pie chart icon means that the expense has been allocated between two or more FOAP’s. Click on the icon to see how the expense is being charged.
    - c. To see the details on each expense, click on the line.
    - d. To see the receipt(s) associated with the expense, click on “View Receipts”.
    - e. To see the itinerary, click “Back” to return to the main screen and select “Travel Allowances”, then select the “Itineraries” tab. Once you are done, click “Report” at the top of the screen to go back to the main screen.
    - f. If you are ready to approve, click “Approve”.
    - g. If you do not approve of the document, click on “Send Back”.
5. Concur will bring you back to the list of documents pending your approval. Choose the next document and repeat step 4 until all documents are approved.
6. Once you have completed all of the documents, close the app.