Concur Application for Mobile Devices

Situation: You would like to have access to Concur Travel and Expense on your Mobile Device

**Step One: Sign up for Mobile**

- **From a computer**, log into Concur in the usual manner – using your PennKey authentication
- Click on the **Profile drop-down** and select **Profile Settings**

  ![Profile Settings Screen]

  - Select **Mobile Registration** on the top tool bar

  ![Mobile Registration Screen]

  - In the center of the page, under “Review your login details” click on **Create a mobile PIN**

  ![Create a mobile PIN Screen]
• Follow the instructions for setting up a PIN, which will be your password when you log on to the Concur mobile app. Click Set PIN.

Step Two: Verify Email Addresses
• Return to the Profile page and select Email Addresses on the left margin (listed under “Your Information”)
• Click Add an email address
  o Enter your email address
  o Select “Yes” to have Concur travel notifications sent to that email account.
  o Click OK to save

  o Click Verify
  o Check your email account for a verification message from Concur
  o Copy the code from the email message into the Enter Code box
  o Click OK to complete the verification. Add multiple email addresses by repeating the steps above

With your verified email address you can email receipt images to receipts@concur.com to have your receipts uploaded into your Receipt Store.
**Step Three: Load Concur App on your Mobile Device**

- Using your phone or other device, connect to the appropriate store for downloading applications (example: Apple’s App Store or Droid’s Play Store). Search for Concur. It will be called Concur or Concur mobile. It is free.
- Download the application. The resulting icon will appear:
- If you have any questions, use the “Learn more” link on the Mobile Registration page.

**Step Four: Log into Concur Mobile on your Mobile Device**

- On your Mobile Device, click the Concur icon.
- Enter your login name. **Important Note:** Your login name in Concur Mobile is your PennKeyName@upenn.edu. It may look like your email address, but it is not necessarily the same.
- Use the PIN you created as your password

**Step Five: Use Concur Mobile**

- Login to Concur using your mobile device.
- You can now book travel, enter expenses, add receipts, approve expense reports and see the status of existing expense reports.
- When you are done, **always Log Out**. Depending on your mobile device (brand specific) it will most probably appear in the top or bottom margin of the screen. If you simply close the application, it will remain open to accidental entries or tampering.

**Step Six: Change settings in Concur Mobile to simplify future logins**

- Within the Concur Mobile app, go to Settings.
- Click **Save Login**. **For security purposes, do not click Automatically Login.**

**If you forget or need to change your mobile PIN**

**Note:** If you have been locked out of your mobile account for too many failed attempts to log in, skip to the next section, **If your mobile account has been locked**

- Return to the Profile page (Profile>Profile Settings)
- On the left hand margin, under “Other Settings”, click on **Forgot Mobile Password (PIN)**
  **Note:** Do **NOT** click Change Password

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<th>Other Settings</th>
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<td><strong>Forgot Mobile Password (PIN)</strong></td>
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• Enter your login ID for the mobile app, which is your Pennkey followed by @upenn.edu, in the Login ID field. **Note:** This is not necessarily your email address.
• Click Submit

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Forgot your Mobile Only Password (formerly PIN)?

Forgot your Mobile Only Password (formerly PIN)?
Please enter your login ID below and we will send you an email with a link to reset your mobile only password.
**NOTE:** This is different from your password. This is a mobile only password for companies that use Single Sign On (SSO) on the Web, but not on mobile.

Login ID:

Submit or Cancel
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• You will receive an email from Concur with instructions on resetting your PIN. Click on the URL in the email to create a new PIN. Your new PIN must be different from your last four PINs.

**If your mobile account has been locked**

• Contact the Concur helpdesk at 215-746-HELP (215-746-4357). Choose option 3 for Concur, then option 2 for Expense.
• The Concur administrator will wipe your mobile PIN, and you will have to create a new PIN in order to log in again. To create a new PIN, see *Step 1: Sign up for Mobile App*. Your new PIN must be different from your last four PINs.

Note: The Concur Mobile apps are offered as a convenience to the user, but are not part of the ISC catalog of supported apps.

**Concur Mobile now has an exciting new feature – Expenselt, an automatic expense entry itemization tool**

(It is sitting in the spot that used to say Receipt.)
NOTE: If you still see the word Receipt instead of ExpenseIt, log out of Concur Mobile completely, and then log back in again. On your mobile device, “logout” can be found under Settings. This should update your software.

**How Do I Use It?**

- Click the button “ExpenseIt”
- Take a picture of your receipt or upload it.
- ExpenseIt will automatically review your receipt and create the expense entry. It will select the expense category, match credit card charges and even itemize hotel bills.
- Review the entry. Is the expense type correct? If not, change it. The system will learn from you and overtime will know that certain expenses items such as Uber or Lyft are always categorized by you as expense type Taxi. It will also learn that every time you go to Restaurant ABC you categorize the expense as a Business Meal with Attendees. Note: It cannot look at your behavior prior to today. It will learn from today and apply it moving forward.
- Once you are happy with the entry, accept it and it is ready to be put on an expense report.
- All of this will transfer automatically into the computer version of Concur. As always changes, additions and deletions can be made there even after ExpenseIt has done its work.

**What won’t ExpenseIt do?**

- It cannot determine if a room service meal is non-reimbursable because you use per diem. It will categorize it as a meal and you will need to adjust the expense type to non-reimbursable.
- It has no way of knowing the attendees at a Business Meal with Attendees. You will have to input those as you do now.
- It will not select Yes or No on the “alcohol as part of meal” question? You must still do that.
- It is only available to do itemizations on the Concur Mobile app. It does not exist in the computer version of Concur. You will still have to assign expense type assignments and manually enter itemizations when working on the computer version of Concur.

There may be a short learning curve both for the user and for the software (as it learns your behavior), but we’ve heard great things about it.

Questions: doftemsupp@pobox.upenn.edu