Introduction to........

**Concur's mobile app – iPhone®**

Version 8.10 - December 2012

Use Concur on your iPhone to assist with your Expense and Travel needs.

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.

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Among other things – you can enter out-of-pocket expenses real-time and take a picture of the associated receipt; create, submit, and check the status of your expense reports; and finish your expense report approvals. You can check your itinerary; book a flight, taxi, rental car, Amtrak, or hotel; and view maps and directions from your current location.
## Overview

### Feature List

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<th>If you use Expense, you can:</th>
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<td>• Add, edit, and delete out-of-pocket expenses</td>
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<td>• Search for and book flight, hotel, rental car, and</td>
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### User Roles and Permissions

Users with the Travel User role can access the Travel-related features.
Users with the Expense User role can access the Expense-related features.
Users with the Expense approver role can approve expense reports.
Users with the Invoice approver role can approve payment requests.
Users with the Travel Request approver role can approve travel requests.
Users of Locate & Alert can check-in.

### Registration

If you have any of the roles listed above, **Mobile Registration** appears on the **Profile** menu in the web version of Concur.

**NOTE:** If your company uses Single Sign On (SSO) for Concur's mobile app, this page will be slightly different.

1) Create your mobile PIN.

2) To obtain the app, go to the App Store - Use these search terms: Concur, Concur Mobile, Cliqbook, travel, expense, hotel, taxi, receipt, hotel booking, business travel, expense report

3) Click Learn more... to view demos and access other information.
Log On

Once you have downloaded the Concur app, locate the Concur icon on your application menu. Start the application and log in with your mobile PIN. The Concur home screen appears. It provides your main menu, shows your Travel and Expense options, and more.

**NOTE:** If your company uses Single Sign On (SSO) for Concur’s mobile app, you may be directed to your company’s mobile page where you log in with your regular company network credentials.

Trips

View Itineraries

To view information about your trips, select **Trips** on the home screen.

Select the desired trip. Then, select the trip segments to see the details.
**Flight Information**

Access additional information from the flight screen.
Book a Flight

Book a flight by selecting **Book Travel** on the home screen and then **Book Air**.

**NOTE:** Your company's configuration may prevent you from booking flights. Check with your Concur administrator.

1. Enter the departure and arrival locations along with the other search criteria.
2. Complete all other required fields and questions.
3. Select **Search**.

The search results are displayed by the number of stops and then carrier.

4. Select the carrier.

5. Select the flight.

6. Complete all other required fields and questions.
7. Select **Reserve**.

Note the following:
- **Ghost cards** are special credit cards used by some companies. If a ghost card is available to you in the web version of Concur, it will appear in the credit card list here, too.
- If you have one or more frequent flyer programs, they will appear on this screen so you can choose.

If this feature is available to you, select **ON** for **Refundable Only** so only refundable flights appear in the search results.
**Book a Rental Car**

To search for and book rental cars:

- On the home screen, select **Book Travel** and then **Book Car** – or –
- From an itinerary, select (at the top of the itinerary screen) to access the menu and then select **Book Car**

**NOTE:** If you add a car from the itinerary, the airport and pick-up/drop-off dates are pre-populated.

1) Enter the location, dates, and times along with the other search criteria.
2) Complete all other required fields and questions.
3) Select **Search**.

4) Select a car.

5) Complete all other required fields and questions.
6) Select **Reserve**.

*Ghost cards* are special credit cards used by some companies. If a ghost card is available to you in the web version of Concur, it will appear in the credit card list here, too.
**Book a Hotel**

To search for and book hotel:

- On the home screen, select **Book Travel** and then **Book Hotel** – or –
- From an itinerary, select + (at the top of the itinerary screen) to access the menu and then select **Book Hotel**

**NOTE:** If you add a hotel from the itinerary, the airport and check-in/check-out dates are pre-populated.

1) Enter the search criteria.
2) Complete all other required fields and questions.
3) Select **Search**.
4) Review the map.
5) Select a hotel.
6) Review the cancellation policy.
7) Select a room.
8) Complete all other required fields and questions.
9) Select **Reserve**.

**Ghost cards** are special credit cards used by some companies. If a ghost card is available to you in the web version of Concur, it will appear in the credit card list here, too.
MORE INFORMATION ABOUT HOTELS

On the Select Hotel screen...

1) When you select Reserve when booking the flight, a confirmation message appears.
2) Select OK.

On the reservation screen...

Shortcut for Car and Hotel

When you book a flight, you can easily add a car or hotel.

3) Select Add Car or Add Hotel.

Cancel the hotel, if necessary.

Change the sort order.

View Agency Contact Information

On the Trips screen, access the menu and select Travel Agency Info.
**Book Amtrak Direct Connect**

Book rail by selecting **Book Travel** on the home screen and then **Book Rail** – if your company is configured to use Amtrak Direct Connect.

1) Enter the search criteria.
2) Complete all other required fields and questions.
3) Select **Search**.

4) Select a train.

5) Select a fare.

Ghost cards are special credit cards used by some companies. If a ghost card is available to you in the web version of Concur, it will appear in the credit card list here, too.

6) Complete all other required fields and questions.
7) Select **Reserve**.

The **Segment Details** screen provides your trip details.
**Use Taxi / MetrO / GateGuru**

On the **Travel Apps** menu on the **Trips List**:

* Use **Taxi Magic** – to search for a taxi and reserve a taxi.

**NOTE:** Since Taxi Magic is available only in the United States, the **Taxi Magic** option will appear on the **Travel Apps** menu for users with home addresses in the United States.

* Use **MetrO** to locate public transportation. MetrO is a free guide to public transport systems worldwide - with at least 400 cities included.

* Use **GateGuru** for information about airport amenities, food, shops, services, gates, ATMs, security, and more.

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**Expenses and Expense Reports**

**List of Expenses (the Expenses Screen)**

Select **Expenses** on the home screen to access the **Expenses** screen. On the **Expenses** screen, you can:

* Add, view, edit, and delete Quick Expenses

  **NOTE:** Quick Expenses are designed to be quick and easy. For more intricate expenses (car mileage/kilometers, attendees, and itemizations), create the expense from an open expense report.

* View and make minimal edits to card charges, which appear with the ✉ icon. Note the following:
  - To make more extensive edits, edit the transaction once it is attached to an expense report.
  - If you are allowed to delete card transactions in the web version of Expense, then you can delete them here, too.

* Attach expenses - both Quick Expenses and card charges - to an expense report.

**NOTE:** The ✉ icon indicates that there is a receipt image attached.
**List of Reports (the Active Reports Screen)**

Select **Reports** on the home screen to access the **Active Reports** screen.

On the **Active Reports** screen, reports are grouped by: **Unsubmitted Reports, Submitted Reports, and Other Reports**.

On the **Active Reports** screen, you can:

- Review the report status
- Delete a report
- Create a new report
- Access your expense reports so you can:
  - View and edit the report summary (report header)
  - View and attach receipt images
  - Add simple as well as more intricate expenses (car mileage/kilometers, attendees, and itemizations)
  - View, edit, and delete expenses
  - Submit your report

**Submit Your Report**

When ready, select **Submit**.

If you are allowed to select an approver before submitting an expense report, then you will be prompted to do so when you select **Submit**.
Create a Quick Expense

To add a simple expense:

- Use the + on the top of the Expenses screen - or -
- Use Quick Expense on the home screen (shown below)

Delete an Expense from the Expenses Screen

You can delete Quick Expenses from the Expenses screen.

NOTE: If you are allowed to delete card transactions in the web version of Concur, then you can delete them here, too.

1) Select Edit.

2) The expenses can now be selected using the ○ to the left of each expense. Select the desired expenses.

3) Select Delete.
Attach Expenses (from the Expenses Screen) to a Report

You can attach expenses to an unsubmitted expense report or to a new expense report.

1) Select Add to Report.

2) The expenses can now be selected using the circle to the left of each expense. Select the desired expenses.

3) Select Add to Report.

4) Either:
   - To create a new report, select + at the top of the screen - or -
   - Select from existing reports

The expenses appear on the new or existing report.
**Add a Personal Car Mileage/Km Expense – Fixed Rate**

You can add fixed-rate Personal car mileage/kilometer expenses.

There are two ways to add a mileage/kilometer expense:

- From the home screen (Method #1 below)
- From an open report (Method #2 below)

**Method #1:**
1) On the home screen, select 📜 to access the menu.
2) Select Car Mileage.
3) Create a new report or select an existing report.

**Method #2:**
1) Open a report, select + to access the menu.
2) Select Add New Expense.
3) On the expense screen, select the Personal Car Mileage expense type. (Your company may use a different expense type name.)
4) Create the expense. Complete the fields on the Add Car Mileage screen.
5) Select Save.

Expense calculates the amount based on the distance and rate. The expense appears on the report.
**Add a Personal Car Mileage/Km Expense – Variable Rate**

Adding a variable-rate personal car mileage expense is the same, except – depending on your company’s configuration – you may also be able to:

- Select a different vehicle.
- Enter the number of passengers.

**Add a Company Car Expense**

Add company car expense just like any other expense.

**View and Edit an Expense on an Expense Report**

If an expense is attached to an expense report, you can edit almost every field. Open a report and select an expense. The **Expense Details** screen appears.
**Itemize an Expense on an Expense Report**

You can itemize an expense if the expense is attached to an expense report.

1. Open the report and open the expense.
2. Select **Itemize**.
3. Enter the dates and rates, and complete the remaining fields.
4. Select **Save**.
5. Concur creates expenses for each day and indicates if there is a remaining amount to be itemized. If there is a remaining amount, select to add the itemizations for the remaining amount.
6. Itemize the remaining amount.
7. Select **Save**.

The remaining amount equals zero.
Add Attendees to an Expense on an Expense Report

You can add attendees to the expense if the expense is attached to an expense report. (Just like with the web version of Expense, only certain expense types require attendees.) You can:

- Select from the iPhone contacts list
- Enter attendee information manually
- Search and select from your Favorite Attendees list; search for and select an attendee group; search and select from your company's attendee list; search and select from an external source (like Salesforce)

GETTING STARTED

1) Open the report and open the expense.
2) Select Attendees.
3) Select Add Attendee.
4) Select the desired method.

When all attendees have been added, Expense distributes the expense amount equally among all attendees.

If the expense already has attendees, they are listed here.
**ADD ATTENDEE - CONTACTS**

You can select from your phone’s contact list if the attendee happens to be in your contact list.

1) Select **Select from Contact**.

2) Select the attendee from your contact list.

3) Enter the required attendee information.

4) Select **Save**.

**ADD ATTENDEE - MANUALLY**

You can add an attendee by manually entering the appropriate information.

1) Select **Add Attendee Manually**.

2) Enter the required attendee information.

3) Select **Save**.
**ADD ATTENDEE - SEARCH**

You can search for:

- Attendees in your Favorite Attendees list
- Attendee groups
- Attendees in your company's attendee list
- Attendees from an external source (like Salesforce)

For favorites or groups:
1) Select **Search for Attendee**.
2) Using **Quick Search**, type part of the attendee's last name or the attendee group name.
3) Select the correct attendee or group from the search results.

For your company's attendee list or attendees from an external source (like Salesforce):
1) Select **Search for Attendee**.
2) Using **Advanced Search**, select the appropriate attendee type (or external source, if available).
3) Enter the search criteria.
4) Select **Search**.
5) Select the correct attendee from the search results.
ADDITIONAL ATTENDEE FEATURES

If your company is using these attendee-related features in the web version of Concur, then they are also available in the mobile app:

- You may or may not be able to view the attendee amounts – the portion of an expense that is allotted to each attendee.
- You may or may not be able to edit attendee amounts – the portion of the expense that is allotted to each attendee.
- You may or may not be able to add a new attendee until you have searched through your favorites.
- When you add a new attendee, the system may or may not check for duplicates.
- You may or may not be able to enter a "count" of unnamed attendees. For example, assume you gave a holiday gift basket to a doctor's office that has 10 employees. Instead of listing all employees by name, you can enter the count of 10.
- You may or may not be able to enter "No Shows" which more accurately divides the expense amount among the actual participants. (Your field may be named something other than No Shows.)

REMOVE AN ATTENDEE FROM AN EXPENSE

To remove an attendee from an expense, swipe the attendee name; the Delete button appears.
Remove an Expense from an Expense Report

To remove an expense from an expense report, swipe the expense; the **Delete** button appears.

**NOTE:** If you delete a Quick Expense or a card transaction from an expense report, it is not really deleted; it is moved back to your pool of expenses on the Expenses screen. (Any receipts associated with Quick Expenses or card transaction expenses remain as well.)

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.)

View and Edit the Report Summary (Report Header)

You can view and edit the report header information.

1) Open the report.  
2) Select **Report Summary**.  
3) Make the desired changes.  
4) Select **Save**.
Create an Expense Report from the Active Reports Screen

You can create a new expense report from the Active Reports screen (the expense report list).

1) Select the +.

2) Complete the required fields.
3) Select Save.
4) Then, add expenses from the expense list or create new expenses as described previously.

Delete an Expense Report from the Active Reports Screen

You can delete unsubmitted expense reports from the Active Reports list by swiping the report.

NOTE: If you delete a report that contains Quick Expenses or expenses created from card transactions, the Quick Expenses and card transaction expenses are not really deleted; they move back to your pool of expenses on the Expenses screen. (Any receipts associated with Quick Expenses or card transaction expenses remain as well.)

Any other type of expense is truly deleted. (This is consistent with the web version of Expense.)
**Work with Receipts**

The icon indicates that a receipt is required.

1) On the home screen, select to access the menu, and then select **Receipts**.

2) Select **Attach Receipt**.

3) Take a picture using the phone’s camera, select from the phone’s Photo Album, or select from the Receipt Store.

**UPLOAD TO THE RECEIPT STORE**

1) On the home screen, select to access the menu, and then select **Receipts**.

2) Select **+** to upload.

Select an image to view it.
Approvals

Approve Expense Reports (for the Expense Approver)

Select Approvals on the home screen to access the Approve Reports screen.

1) Open the report.

2) Review the report summary (header).

3) Review the expense details, including attendees (if any), itemizations (if any), and receipts (if any).

4) Select Approve or Send Back. If you send a report back, you must provide a comment.

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.

Select one of these:

- Select Additional approver required to approve the report and send the report to the next approver in the workflow.
- Select Approve report to approve the report and send it directly to Accounting Review.
- Select Cancel to return to the previous screen (with the Send Back and Approve options).
Approve Payment Requests (for the Invoice Approver)

Select Invoice Approval on the home screen to access the Approve Invoices screen.

1) Open the request.

2) Review the summary (header).

3) Review the vendor information, line item information, images, etc.

4) Select Approve or Send Back. If you send the request back to the employee, you must provide a comment.
Approve Travel Requests (for the Travel Request Approver)

Select Travel Requests on the home screen to access the Travel Requests screen.

1) Open the request.

2) Review the summary (header).

3) Review the segments and expected expenses.

4) Select Approve or Send Back.
   If you send the travel request back to the employee, you must provide a comment.
**Use Locate & Alert**

If your company uses Concur’s Locate & Alert service, you can check in via the iPhone.

1) On the home screen, select (upper right corner) and then select **Location Check In**.

2) On the **Location Check In** screen:
   - Select your current location
   - Select the number of days remaining at that location
   - Indicate whether immediate assistance is required
   - Enter a comment, if desired

3) Select **Check In**.
**Save Login ID and Auto Login**

1) Select to access Settings.

2) Select **Auto Login** to have Concur log in automatically when you open the app.

3) Select **Save User Name** to have Concur remember and then provide your ID at login.

**NOTE:** You must select **Save User Name** in order to use auto login.

**Turn off Twitter**

1) Select to access Settings.

2) Change **Show Twitter** to OFF.