This version shows the previous user interface. Though the home screen is different in the newest user interface, most procedures and processes remain the same. Videos are available in the training toolkit. Applies to these Concur solutions: Introduction to..... Expense in Travel & Expense  $\times$ Concur's mobile app – iPhone<sup>®</sup>  $\mathbf{X}$ Travel X Travel in Travel & Expense Version 8.10 - December 2012 ⊠ Invoice  $\times$ Travel Request Use Concur on your iPhone to assist Overview......2 with your Expense and Travel User Roles and Permissions ......2 needs. Registration.....2 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. \_AT&T 🛜 11:41 AM Book a Hotel.....7 Ø. Shortcut for Car and Hotel ......8 C•ncur View Agency Contact Information......8 Trips Use Taxi / MetrO / GateGuru ......10 > 0 active, 2 upcoming Expenses and Expense Reports ......10 **Q** Book Travel > Book a Hotel, Car, and more M Travel Requests > 4 travel request(s) to approve Expense Attach Expenses (from the Expenses Screen) to a Report ... 13 Ruick Expense Add a Personal Car Mileage/Km Expense – Fixed Rate ...... 14 > Add a Personal Car Mileage/Km Expense - Variable Rate .... 14 Capture expense and receipt Reports > View and Edit an Expense on an Expense Report......15 6 unsubmitted report(s) **Expenses** > 0 corporate card transaction(s) Approvals Create an Expense Report from the Active Reports Screen .. 22 > report(s) to approve Delete an Expense Report from the Active Reports Screen .. 22 Invoice Approval > Invoices to approve Approve Expense Reports (for the Expense Approver) ....... 24 Approve Payment Requests (for the Invoice Approver) ...... 24 Twitter From Concur Approve Travel Requests (for the Travel Request Approver) 26 Tue Aug 16 5:30 PM Travel never goes -5 as planned, so expect to be thrown... Try Tripit Tribit 

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

<ul> <li>If you use <i>Travel</i>, you can:</li> <li>View your itinerary</li> <li>Search for and book flight, hotel, rental car, and Amtrak</li> <li>Check your flight status using FlightTrack</li> <li>Check airport services/features with GateGuru</li> <li>Access Taxi Magic (available to US clients)</li> <li>Access MetrO (ground transportation)</li> <li>Map locations, obtain driving directions, view vendor details</li> <li>View travel agency contact information</li> </ul>	<ul> <li>If you use Expense, you can:</li> <li>Add, edit, and delete out-of-pocket expenses</li> <li>Capture and upload receipt images</li> <li>View and edit downloaded card transactions</li> <li>Add attendees and itemizations to expenses</li> <li>Attach expenses to an expense report</li> <li>Create, edit, delete, and submit expense reports</li> <li>Approve or reject expense reports (if you are an approver)</li> <li>Access Taxi Magic (available to US clients)</li> </ul>
<ul> <li>If you use <i>Invoice</i>, you can:</li> <li>Approve payment requests (if you are an approver)</li> <li>If you use <i>Locate &amp; Alert</i>, you can:</li> <li>Check in</li> </ul>	<ul> <li>If you use <i>Travel Request</i>, you can:</li> <li>Approve travel requests (if you are an approver)</li> </ul>

#### **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		Travel Expense Central Reconciliation Invoice Reporting Locate Administration Profile nge Password System Settings Mobile Registration Mobile Devices Travel Vacation Reassignment
If you have any of the roles listed above, <b>Mobile</b> <b>Registration</b> appears on the <b>Profile</b> menu in the web version	My Profile           Your Information           Personal Information           Company Thormation           Company Thormation           Careta: Information           Energency Contact           Gredit Cards           Travel Peterences           International Travel           Prequent-Traveler Programs           Assistants/Arrangers           Travel Request Settings	You we been designated as an assistant for one or more people. If you'd like to edit their profiles instead of yours, select a name from the list       Me         Weckome To Concur for Mobile         Set PN         vincins to 4-200 PM         User Name / Concur for Mobile         User Name / Concur for Mobile         Set PN         User Name / Concur for Mobile         To log in to Concur on your mobile device, you must enter your User Name and a Mobile ENN. Your User Name is terrybrown@foregone.com. If you have not yot at up or need to change a FIN, enter a PIN Which can indude letters, numbers, and special characters such as (\$, or # but no spaces) in the fields low.         Mobile FIN       Versity Mobile FIN         Sign In       Create/Update Mobile ENN
of Concur. <b>NOTE:</b> If your	Travel Request Settings Travel Request Information Travel Request Delegates Travel Request Approvers Travel Request Approvers Eavorite Attendees	Need to set your PAP     1) Create your mobile PIN.
company uses Single Sign On (SSO) for Concur's mobile app, this page will be slightly different.	2) To obtain Use these so Mobile, Cliqu receipt, hoto expense rep 3) Click <b>Lea</b>	in the app, go to the App Store - search terms: Concur, Concur gbook, travel, expense, hotel, taxi, otel booking, business travel,

#### 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



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II Trips

0 active, 2 upcoming

Ruick Expense

6 unsubmitted report(s

0 corporate card transaction(s)

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Reports

Expenses

Book a Hotel, Car, and more

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#### FLIGHT INFORMATION

Access additional information from the flight screen.



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Done

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Flight Status

## Book a Flight



## 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.

	Book Rai	1
entl. AT&T 🗢 11:53 AM 📼	Book Air	
Location Dallas, TX, USA	Cancel	
Pick-up Date Sun Sep 18, 2011		
Pick-up Time 9:00 AM	$\mathbf{N}$	
Drop-off Date > Mon Sep 19, 2011		
Drop-off Time > 9:00 AM	4) Select a car.	
Car Type		
1) Enter the location, dates, and times along with the other search criteria.	Cars near Dallas, TX, USA Sun Sep 18, 2011 - Mon Sep 19, 2011	
2) Complete all other required	Advantage Advantage	
fields and questions.	Economy Car\$16.64Automatic transmissionper day	
3) Select <b>Search</b> .	Compact Car\$16.64Automatic transmissionper day	
select Car Car Details Reserve	Intermediate Car \$17.48 > Automatic transmission per day	
Advantage Pick-up: Sun Sep 18, 2011	Standard Car Automatic transmission\$18.00 per day	
Drop-off: Mon Sep 19, 2011	Full-size Car\$18.27Automatic transmissionper day	
Card Corporate Card	Ace ACE 38 Results	
Phone Map Address DALLAS LOVE FIELD A 6) Select <b>Reserv</b>	Select to change the sort order.	
<i>Ghost cards</i> 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.	Sort by Price Cancel	

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**Book Hotel** 

**Book Car** 

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0 active, 3 upcoming

Book Travel

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## 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 <sup>1</sup> (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.



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**Book Hotel** 

**Book Car** 

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Trips

0 active, 3 upcoming

Book Travel

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#### **MORE INFORMATION ABOUT HOTELS**

#### On the Select Hotel screen...

#### On the reservation screen...



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#### 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.





**Reservation Status** NotPurchasedThroughGDS

Arrive Wed Aug 17 11:10 AM Station

Chicago - Union Station

Vendor Amtrak Train Type

334

Last updated Aug 16, 2011 7:22:03 PM .....

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Concur's mobile app – iPhone®

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## 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.



#### 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  $\blacksquare$  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

[	atil AT&T 🛜 12:26 PM 🚍
	Active Re Report
	Sales Training \$1,713.18 Jun 28, 2011 A A A A A A A A A A A A A A A A A A
	Report Summary
	Receipts
	Room Rate \$823.81 Jun 23, 2011 =
	Car Rental \$375.35 Jun 23, 2011
	Business Meal (attendees) \$153.62 Jun 22, 2011 The Steak House, Omaha,
	Airfare \$360.40 May 27, 2011 Alaska Airlines
	Submit
-	
Submit Your Report	If you are allowed to
When ready, select <b>Submit</b>	



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## Create a Quick Expense

To add a simple expense:

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

■ AT&T 🗢 11:41 AM	<b>—</b>	•••• AT&T 🗢 12:28 PM	<b></b> •					
		Concur Quick Expense	Save	atti. AT&	r 🛜	12:28 PM		-
Travel		Dessist		Concu	-	Expenses		+
0 active, 2 upcoming	> 1	Receipt	~	Lunch	-		\$15.24	_
Q Book Travel Book a Hotel, Car, and more	>	Date * Tue Aug 16, 2011	>	Apr 1, Starbu		Seattle WASHIN		>
Expense	,	Type * Breakfast	>		6, 2011	Redmond, WA	\$15.26	>
Capture expense and receipt  Reports 6 unsubmitted report(s)	>	Currency * US Dollar	>		3, 2011	Bellevue, Washi	\$7.25	>
Corporate card transaction(s)	>	Amount * 15.25	>		), 2011	0	\$18.21	>
1) Select Quick Expense.		Vendor Starbucks	>	Break		Seattle, WA	\$15.25	>
	<b>_</b>	Location Redmond Washington	>	0	,	Redmond, Was		
	an	Enter the required inform d attach the receipt imag Select <b>Save</b> .		e	pens	done, the ne se appears o <b>ses</b> screen.		1

#### 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.



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To add a more intricate

expense (car mileage/ kilometers, attendees,

itemizations), add the

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expense to an open

report.

## Attach Expenses (from the Expenses Screen) to a Report

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



AT&T 🛜 12:26 PM	<b>_</b>
Active Re Create Report	Save
( <b>-</b>	
Report Name * 8/16/11 Report	>
	_
Report Id	
Policy *	
US Expense Policy	>
Report Date	>
Tue Aug 16, 2011	
Business Purpose *	>
Report Currency	
US, Dollar	
Receipts Received	FF
Approval Status	
Not Submitted	
Comment	>
Travel Requests	>

# The expenses appear on the new or existing report.

L AT&T 奈 Concur	12:30 PM Report	+
<b>3/16/11 Rej</b> Aug 16, 2011 Not Submitted		\$15.26
<ul> <li>Repor</li> <li>Receipt</li> </ul>	t Summary	
Recei	515	
Breakfast May 16, 201	1 ledmond, Washi	\$15.26

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#### 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) •



4) Create the

expense. Complete

the fields on the Add

## Add a Personal Car Mileage/Km Expense – Variable Rate

RX57JJJ

2

Number of Passengers

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

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Select the 🔘 in the

0 - 10000 £0.40 per MILE 10001 and above £0.25 per MILE £1.50 per Passenger

rate details.

Am 17

Amount field to see the

.....

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

## Add a Company Car Expense

Report Add Expense	Add company car expense just like any other expense.
Receipt	1) Open a report, select + to access the menu.
Expense Type *	2) Select Add New Expense.
Company Car Use	3) On the expense screen, select the <i>Company Car Use</i> expense type (Your company may use a different expense type name)
Transaction Date * Tue Sep 18, 2012	type. (Your company may use a different expense type name.)

## 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.

*** AT&T 3G 11:40 AM 🕺 73 % 💶	ati AT&T 3G 11:40 AM	
Active Re Report +	Report Expense Details Save	
Sales Meeting \$152.63	Business Meal (attendees) \$152.6	
Jun 28, 2011 Not Submitted	Jun 30, 2011 Seattle, Washington	2) Make the desired changes.
Report Summary		3) Select <b>Save</b> .
E Receipts	<b>L</b> Attendees	Currency *
	Receipt	US, Dollar
Business Meal (attendees) \$152.63		Payment Type *
Jun 30, 2011 Seattle, Washington	Expense Type * Business Meal (attendees)	Cash
		Amount * >
	Transaction Date *	
	Business Purpose *	Receipt Status *
	contracts	
1) Open the report and	Enter Vendor Name	Comment >
open the expense.	Enter Vendor Name	
	City *	Salesforce Opportunity
	Seattle, Washington	Salesforce Event
	Currency *	
		Personal Expense (do not reimburse)
		Custom 01



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#### 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)



When all attendees have been added, Expense

distributes the expense

Expense Details Attendees

Verbslaver - Business Guest

Verbslayer - Business Guest

**Timothy Cleese** 

Travis Clemmons

attendees.

amount equally among all

12:46 PM

76.81

76.81

#### **ADD ATTENDEE - CONTACTS**

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



#### **ADD ATTENDEE - MANUALLY**

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



#### **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) .



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Add Attendee via Bump

Expense Details Attendees

#### **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.



Expense Details Attendees	
	s +
No Shows	0.00 >
Swipe to delete	
Sample, Pat Dir ABC Company Business Guest	<b>83.25</b> 1 ≯
Sample, Pat 83.2 Asst ABC Business Guest	Delete
Gavronski, Lisa	83.25
This Employee	

## 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.)

📲 AT&T 🛜	12:47 PM	-
Active Re	Report	+
Sales Trainir Jun 28, 2011 Not Submitted	ng	\$1,713.18 🚆 🗚
Room Rate Jun 23, 2011 Residence Inn	s, Sacramento,	\$823.81
<b>Car Rental</b> Jun 23, 2011 Enterprise, Sm	ithfield, North	\$375.35 ==
Business Me Jun 22, 2011 The Steak Hou	al (attendees) use, Omaha,	\$153.62
Airfare May 27, 2011 Altha Airi	<u>♦ ح</u> امي ااا	\$360.40
		Submit



## View and Edit the Report Summary (Report Header)

You can view and edit the report header information.



#### 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).

📲 AT&T 🛜 12:2	26 PM	ļ
Concur Active	Reports	+
Unsubmitted Re	ports	
Trip to Bellingham Not Submitted Jul 1, 2011	\$7	78.98 >
Sales Training Not Submitted Jun 28, 2011	\$1,71	3.18 ▲ >
Sales Meeting Not Submitted Jun 28, 2011	\$15	52.63 >
Report on 5/28/20 Not Submitted May 28, 2011	11 \$3	34.43
Mileage Report Not Submitted May 28, 2011	\$	\$0.00
1) Select the	<b>±</b> .	



## 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.)

**** AT&T 🛜 12:49 PM	-
Concur Active Repo	orts 🕂
Unsubmitted Reports	
8/16/11 Report Not Submitted Aug 16, 2011	\$22.14
Trip to Bellingham Not Submitted Jul 1, 2011	\$78.98 >
Sales Training Not Submitted Jun 28, 2011	\$1,713.18 A >
Sales Meeting Not Submitted Jun 28, 2011	\$152.63
Report on 5/28/2011 Not Submitted	\$34.43 مراس
Not Submitted May 28, 2011	` <i>'</i> \$0.00 >



## Work with Receipts

The III icon indicates that a receipt is required.



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## Approvals

## Approve Expense Reports (for the Expense Approver)

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Approvals 1 report(s) to approve Select **Approvals** on the home screen to access the **Approve Reports** screen.



## Approve Payment Requests (for the Invoice Approver)





## Approve Travel Requests (for the Travel Request Approver)

## Miscellaneous

#### Use Locate & Alert



#### Save Login ID and Auto Login



