You can use Concur on your BlackBerry to assist with your Expense and Travel needs. You can access your information in a cab, in a meeting, at the restaurant – where your laptop is not available or is too cumbersome.

Among other things – you can enter out-of-pocket expenses real-time and take a picture of the associated receipt; create, edit, submit, and check the status of your expense reports; and complete your expense report approvals. You can check your itinerary; book a taxi, rental car, or hotel; make a dinner reservation; and view the map.

### Contents

- **About this Guide**
- **Overview**
- **Feature List**
- **User Roles and Permissions**
- **Registration**
- **Logging On to Concur**
- **Trips**
- **Cancel**
- **Rental Car**
- **Hotel**
- **Rail**
- **Dining, Taxi, and Metro**
- **Expenses and Expense Reports**
- **List of Expenses (the Expenses screen)**
- **List of Reports (the Active Reports screen)**
- **Create a Quick Expense**
- **Attach an Expense to a New or Existing Report**
- **Delete an Expense from the Expense Screen**
- **Add a Car Mileage/Kilometer Expense**
- **Open an Expense Report**
- **Add an Expense to an Open Report**
- **View and Edit Expense Entries**
- **View and Edit the Expense Report Header**
- **Itemize an Expense on an Expense Report**
- **Add Attendees to an Expense on an Expense Report**
- **Add Attendee - Search**
- **Attach Receipts**
- **Submit an Expense Report**
- **Approvals (if you are an approver)**
- **Trips**
- **Expense Reports**
- **Payment Requests (Invoice)**
- **Miscellaneous**
- **Turn Off Twitter**
- **Error Log – Send to Concur**
- **Change Network Settings**
- **Change Image Folder**
- **Use the Locate & Alert Service**
- **Save Login ID and Auto Login**

### About this Guide

This guide provides instructions for BlackBerry users to set up and get started with Concur's mobile app. All samples show the BlackBerry Bold. Your device may look slightly different.
Overview

Feature List

If you use Travel, you can use Concur's mobile app to:

- View your itinerary
- Search for and book:
  - Hotel
  - Rental car
  - Amtrak
- Check your flight stats
- Email your itinerary
- Obtain map and driving directions
- View vendor details
- Approve or reject employee's trip that are out of policy (if you are a trip approver)
- Use third-party apps for:
  - Dining / Restaurant
  - Taxi
  - Public transportation
- Use Locate & Alert (if your company uses Concur's Locate & Alert service)

If you use Expense, you can use Concur's mobile app to:

- Add, edit, and delete Quick Expenses
- Capture and upload receipt images at the expense level and the report level
- View downloaded credit card transactions
- Attach expenses to an expense report
- View, add, and edit attendee and itemization information
- Create car mileage/kilometer expenses
- Create, view, edit, and submit expense reports
- Approve or reject expense reports (if you are a report approver)
- Search for and book taxi and dining (if desired; available to US clients)
- Use Locate & Alert (if your company uses Concur's Locate & Alert service)

If you use Invoice, you can use Concur's mobile app to:

- Approve or reject payment requests (if you are an Invoice approver)
- Use Locate & Alert (if your company uses Concur’s Locate & Alert service)

User Roles and Permissions

- Users with the Travel User role have access to the travel-related features.
- Users with the Expense User role have access to the expense-related features.
- Users with the Invoice Approver role have access to the invoice-related features.

Registration

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

1) Create your mobile PIN.

2) Obtain the mobile app from the BlackBerry App World.

3) Select Learn more for more information, FAQs, and demos.
Logging On to Concur

Locate the Concur icon, which may be on the home screen of your device or in your device's folder for downloads.

Start the application and log in with your Mobile PIN.

The Concur home screen appears. There are 3 sections: Travel, Expense, and Apps. The sections that display – and the icons in each section – depend on your company’s configuration and your permissions.
**Trips**

Select the **Trips** icon on the home screen to view your itineraries.

1) On the **Trips List** screen, select the trip.

2) On the **Itinerary** screen, select each segment to view the details.

---

**Flight Details**

Seattle to Chicago  
Confirmation # ISASCS

Alaska Airlines 20  
Depart SEA

8:40 AM  
Arrive ORD

Mon Oct 10  
Mon Oct 10

Terminal -  
Terminal 3

Gate -  
Gate -

Class: ECONOMY

Seat: 28F

Meal: FF

Status: Confirmed

Confirmation: ISASCS

Aircraft: Boeing 737-900

Stops: Non-stop

Duration: 3:53

---

**Car Details**

**Enterprise at Mon Oct 10 14:33**  
from Chicago  
Confirmation 987605298COUNT

**Reservation Information**

Pick Up: Mon Oct 10 14:33

Drop Off: Fri Oct 14 15:30

Confirmation: 987605298COUNT

Status: Confirmed

Rate: $46.58

---

**Vendor Information**

Enterprise  
ORD

Standard car, Automatic transmission, Air conditioning

---

**Stay Details**

Holiday Inn  
847-954-8600  
10233 W Higgins Rd  
Rosemont, Illinois 60018

**Booking Information**

Check in: Mon Oct 10

Check out: Fri Oct 14

Status: Confirmed

Confirmation: 61865936

Daily rate: $149.00

Total: $596.00

Cancel policy: CXL AFTER 1800 10OCT FORFEIT FIRST NITE STAY

---

**TIP:** For quicker navigation on the **Trips List** screen, type the first letter of the trip.
Access the menu on this page to:
- add a car or hotel to the current trip
- check the flight stats
- email your itinerary
- and more....

**IMPORTANT:** Canceling the flight segment cancels **all** the segments in the entire trip. The trip will no longer appear on the mobile device. The trip will appear on the web version of Travel but with no segments.

To cancel:
1) Select the segment (flight, car, hotel).
2) Access the menu.
3) Select **Cancel**.
Rental Car

Select the Car icon on the home screen to search for and book a rental car. You can search for a car at the airport or an office location.

**NOTE:** You can also add a car to an existing trip. To do so, on the Itinerary screen, access the menu and select Add car – the location and dates are pre-populated for you.

**Note:** Depending on your company’s configuration, you may not be able to book a car unless you add it to an existing itinerary.

**Note about credit cards:**
*Ghost cards* are special credit cards used by some companies. Ghost cards cannot be used with Concur’s mobile app.

When done, the Car/Hotel Reservation appears in your list of trips. Select it to open the itinerary. Select the segment to see the details.
Hotel

Select the **Hotel** icon on the home screen to search for and book a hotel.

**NOTE:** You can also add a hotel to an existing trip. To do so, on the **Itinerary** screen, access the menu and select **Add hotel** – the location and dates are pre-populated for you.

1. Enter/Verify the search criteria and select **Search**.
2. Review the search results.
3. Highlight a hotel and access the menu.
4. Review the map and images.
5. Press Enter to select the hotel.
6. Select the room.
7. Select **Reserve**.

**Note about credit cards:**
*Ghost cards* are special credit cards used by some companies. Ghost cards cannot be used with Concur’s mobile app.

**Note:** Depending on your company's configuration, you may not be able to book a hotel unless you add it to an existing itinerary.
Select the **Rail** icon on the home screen to search for and book Amtrak - if your company is configured to use Amtrak Direct Connect.

1) Select the departure and arrival stations and times, and then select **Search**.

2) Select the train.

3) Select the seat.

When done, the Amtrak trip appears in the list of trips. Select it to open the itinerary. Select the segments to see the details.

**Note about credit cards:**

*Ghost cards* are special credit cards used by some companies. Ghost cards **cannot** be used with Concur's mobile app.
**Dining, Taxi, and Metro**

Use the **Apps** section (at the bottom of the home screen) to access dining, taxi, and other public transportation.

- Select the **Dining** icon to install Open Table. Then, you can search for and make a reservation at a restaurant.
- Select the **Taxi** icon to install Taxi Magic. Then, you can search for and book a taxi.
- Select the **Metro** icon to install Metro. Then, you can search for public transportation.

![Apps Icon Diagram]

Would you like to install Metro?

- **Yes**
- **No**

Would you like to install Taxi Magic?

- **Yes**
- **No**

Would you like to install Open Table?

- **Yes**
- **No**
Expenses and Expense Reports

**List of Expenses (the Expenses screen)**

Use the Expenses icon on the home screen to access the Expenses screen.

On the Expenses screen, you can:

- Add, view, edit, and delete Quick Expenses, which appear with the icon. Note the following:
  - Quick Expenses are designed to be quick and easy.
  - Create the more intricate car mileage/kilometers expenses from the home screen.
  - Once an expense is attached to a report, more fields become editable and you can add attendees and itemizations.
- View and make minimal edits to card transactions, which appear with the icon. Note the following:
  - To make more extensive edits, edit the transaction once it is attached to an expense report.
  - To delete a card transaction, use the full-featured web version of Expense, if your company allows you to delete card transactions.
- Attach expenses - both Quick Expenses and card transactions - to a new or existing expense report.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Room Rate</strong></td>
<td>$814.40</td>
<td></td>
</tr>
<tr>
<td>Fairfield Inns</td>
<td>9/30/2011</td>
<td>Corporate Card</td>
</tr>
<tr>
<td><strong>Breakfast</strong></td>
<td>$18.21</td>
<td></td>
</tr>
<tr>
<td><strong>Airfare</strong></td>
<td>$343.40</td>
<td></td>
</tr>
<tr>
<td>Alaska Airlines</td>
<td>9/3/2011</td>
<td>Corporate Card</td>
</tr>
</tbody>
</table>

**TIP:** For quicker navigation, type the first letter of the expense entry.

**List of Reports (the Active Reports screen)**

Use the Reports icon on the home screen to access the Active Reports screen.

On the Active Reports screen, you can:

- Review the amount, date, and status of each report
- Open a report 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 and edit expenses
  - Submit your report

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Seminar in San Diego</strong></td>
<td>$466.02</td>
<td></td>
</tr>
<tr>
<td>Not Submitted</td>
<td>8/25/2011</td>
<td></td>
</tr>
<tr>
<td><strong>Mileage August 2011</strong></td>
<td>$75.74</td>
<td></td>
</tr>
<tr>
<td>Not Submitted</td>
<td>8/25/2011</td>
<td></td>
</tr>
<tr>
<td><strong>Client Dinner</strong></td>
<td>$153.33</td>
<td></td>
</tr>
<tr>
<td>Not Submitted</td>
<td>8/2/2011</td>
<td></td>
</tr>
<tr>
<td><strong>Trip to LenDev Client Site</strong></td>
<td>$4,521.01</td>
<td></td>
</tr>
<tr>
<td>Not Submitted</td>
<td>7/10/2011</td>
<td></td>
</tr>
</tbody>
</table>

**TIP:** For quicker navigation, type the first letter of the report name.
Create a Quick Expense

Select the **Quick Expense** icon on the home screen to enter a cash expense and take a picture of the associated receipt.

1) Enter/Verify the date and select the expense type.

2) Enter the remaining information.

3) Take a photo of the receipt.

4) Select **Save Expense**.

Once you add the Quick Expense to an expense report, you can add more information, like attendees and itemizations.
**Attach an Expense to a New or Existing Report**

Attach Quick Expenses or card transactions to a new or existing expense report.

1) On the Expenses screen, select the check box for the desired expense -- you can use Enter or the spacebar.

2) Access the menu and select Add To Report.

3) Create a new report or select an existing report.

**NOTE:** If creating a new report, edit the report name here and select the "save" disk.

---

**Delete an Expense from the Expense Screen**

You can delete Quick Expenses from the Expenses screen.

**NOTE:** To delete a card transaction, use the full-featured web version of Expense, if your company allows you to delete card transactions.

1) On the Expenses screen, select the check box for the desired expense -- you can use Enter or the spacebar.

2) Access the menu and select Delete Selected.
Add a Car Mileage/Kilometer Expense

**FIXED RATE**

Use the **Add Car Mileage** icon on the home screen to add car mileage/kilometer expenses.

1) After clicking **Add Car Mileage**, create a new report or select an existing report. **NOTE:** If creating a new report, edit the report name here and select the "save" disk.

2) Search for and select the location.

3) Complete the "to" and "from" information.

4) Enter the number of miles. Concur calculates the amount based on the number of miles and the rate.

5) Select **Save**.

**VARIABLE RATE**

Variable-rate works the same way - except, depending on your company’s configuration, you might be able to enter the vehicle ID, the number of passengers, and the distance to date.

**NOTE:** You can also add a car mileage expense from an open report. With the report open, select **Add New Expense**. Select the **Personal Car Mileage** expense type. (Your company may use a different expense type name.)
Open an Expense Report

Use the Reports icon on the home screen to access the Active Reports screen.

Add an Expense to an Open Report

1) With a report open, select Add New Expense.

2) Select the expense type.

3) Complete the remaining fields. Text can be entered directly into text fields, such as Business Purpose or Comments.

4) Select Save.

NOTE: Once saved, you can attach a receipt, add attendees, and itemize (as described on the following pages).
View and Edit Expense Entries

1) With the report open, highlight the desired expense and Enter.
2) Make the desired changes. Attach a receipt, add attendees, and itemize (as described on the following pages).
3) Select Save.

View and Edit the Expense Report Header

1) With the report open, access the menu and select Report Summary.
2) Make the desired changes. Just like editing expense entries, you can enter text in text fields and select from lists.
3) Attach or view receipts.
4) Select Save.
**Itemize an Expense on an Expense Report**

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

1) With the report open, select the expense to be itemized.

2) Select **Itemizations**.

3) Enter the daily room rate, the daily tax rate, any other daily charges (like parking), and then select **Itemize Hotel**.

4) The exception message indicates that the entire amount has not been itemized.
5) Select **Itemize** to enter the remaining expense or expenses.

6) Select the expense type, complete the remaining fields, and the select **Add Itemization**.

When done, the itemization icon appears and the exception icon is gone.
Add Attendees to an Expense on an Expense Report

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

- Search and select from your Favorite Attendees list (the same list that is available on the full-featured, web version of Expense)
- Enter attendee information manually

**NOTE:** The mobile app currently does not support the following Attendee configurable options: editing the count of attendees; manually changing the amount for an attendee; and the option to include the expense user as an attendee. For these activities, use the web version of Expense.

In addition, the individual attendee amounts appear even if they are configured as hidden in the web version of Concur.

1) With the report open, select the expense that requires attendees.

2) Select **Attendees**.

3) Select either **Search Attendees** or **Create New Attendee**. Both processes are described below.

If the expense already has attendees, they are listed here.
**Add Attendee - Search**

You can search for attendees. The attendees that appear in the list are the same as those in your Favorite Attendees list in the full-featured, web version of Expense. (Mobile does not search any other company list of attendees.)

1) Select **Search Attendees**.

2) Type the first few letter of the attendee's last name and Enter.

3) Select the correct attendee.

4) Verify the information, and then select **Add Attendee**.

The attendee appears in the list and the totals are adjusted accordingly.
1) Select **Create New Attendee**.

To remove an attendee, select the attendee, access the menu, and select **Remove Attendee**.

2) Select the attendee type, complete the remaining fields, and select **Add**.

The attendee appears in the list and the totals are adjusted accordingly.

When done, the attendee icon appears and the exception icon is gone.
Attach Receipts

You can attach receipts to an expense report or to individual expense entries.

<table>
<thead>
<tr>
<th>Active Reports</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Report on 9/3/2011</td>
<td>$34.43</td>
</tr>
<tr>
<td>Not Submitted</td>
<td>9/3/2011</td>
</tr>
<tr>
<td>Trip from Seattle to Dallas</td>
<td>$1,181.80</td>
</tr>
<tr>
<td>Not Submitted</td>
<td>9/3/2011</td>
</tr>
<tr>
<td>Seminar in San Diego</td>
<td>$466.02</td>
</tr>
<tr>
<td>Not Submitted</td>
<td>8/25/2011</td>
</tr>
<tr>
<td>Mileage August 2011</td>
<td>$75.74</td>
</tr>
<tr>
<td>Not Submitted</td>
<td>8/25/2011</td>
</tr>
</tbody>
</table>

You can attach *report-level* receipt images to submitted and approved reports.

To add a receipt to a report:
1) Open the desired report.
2) Access the menu and select **Attach Receipt**.

To add a receipt to an expense entry:
1) Open the desired report.
2) Open the desired expense.
3) Select **Attach Expense Receipt**.

Submit an Expense Report

With the report open, access the menu and select **Submit**.
Approvals (if you are an approver)

**Trips**

Select the **Trip Approvals** icon to view, approve, and/or reject a trip.

1) On the **Trips To Approve** screen, select the desired trip.

2) Select each segment to review the details.

3) When ready, access the menu and select **Approve Trip** or **Reject Trip**.

**NOTE:** If you reject a trip, you must enter a comment for the user.

**TIP:** For quicker navigation on the approvals screens, type the first letter of the report/trip/request.
**Expense Reports**

Select the **Approve Reports** icon to view, approve, and/or send back expense reports.

1) On the **Approve Reports** screen, select the desired report.

2) View the expense entries details, header, attendees, itemizations, receipts, etc. as described previously in this guide.

3) When ready, access the menu and select either **Approve** or **Send Back**.

**NOTES:**
- If you send back a report, you must enter a comment for the user.
- You can access the **Approve** and **Send Back** menu commands from an open report or an open expense.
Payment Requests (Invoice)

Select the Approve Invoices icon to view, approve, and/or send back payment requests.

1) On the Approve Invoices screen, select the request.
2) Review the header, vendor, and line item information.

3) When ready, access the menu and select either Approve or Send Back. **NOTE:** If you send back a request, you must enter a comment for the user.

Miscellaneous

**Turn Off Twitter**

Users can turn off Twitter.

1) Access the menu and select Options.
2) Clear the Enable Twitter check box.
**Error Log – Send to Concur**

To send a log to Concur, turn on logging then recreate the issue. To do so:

1. Select the Back button.
2. Select **Save** when prompted.
3. Log in.
4. Try to re-create the issue.
5. Access the main menu and select **Options**.
6. Select **Send Debug Log**.

![Debug Mode Warning]

1) Access the menu and select **Options**.

![Enable Debug Mode]

2) Select the **Enable Debug Mode** check box.

3) When the message appears, select **OK**.

![Sending Debug Log]

1) Access the menu and select **Options**.

![Enable Debug Mode]

2) Select the **Enable Debug Mode** check box.

3) When the message appears, select **OK**.

![Sending Debug Log]

1) Access the menu and select **Options**.

![Enable Debug Mode]

2) Select the **Enable Debug Mode** check box.

3) When the message appears, select **OK**.
**Change Network Settings**

You may be able to choose a different network setting.

Two of the BES settings have end-to-end mode, where data is encrypted over SSL/TLS for the entire connection between BlackBerry smartphones and the application server.

If the auto-detect option is selected, Concur will attempt the connections in this order:

- Auto-Detect
- WIFI
- BES (has the EndToEnd**Required** option)
- BES-2 (has the EndToEnd**Desired** option)
- BES-3 (has no end-to-end option)
- BIS
- TCP/IP
- WAP2
- MDS Public

![Network Settings Options](image)

**NOTE:** You can access Options from the login screen.

**Change Image Folder**

The import image screen uses the device's default image folder.

To change the default folder, open the camera application on the BlackBerry.

![Image Folder Options](image)

**1) Select the main menu and select **Options**.**

**1) Select the main menu and select **Options**.**
NOTE: For further details, please refer to your BlackBerry user manual.

When importing images, users can also browse to different directories. Scroll to the directory. Select it. Browse to the new folder.
**Use the Locate & Alert Service**

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

1) On the home screen, select **Location Check In**.

2) On the **Location Check In** page:
   - Enter 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 **Location Check In**.

**Save Login ID and Auto Login**

1) Access the menu and select **Options**.

2) Select **Auto Login** to have Concur log in automatically when you open the app.
3) Select **Save Login ID** to have Concur remember and then provide your ID at login.

**NOTE:** You must select **Save Login ID** in order to use auto login.