Introduction to ........

Concur's mobile app – iPad®

Version 8.2 - February 6 2012

You can use Concur on your iPad to assist with your Expense and Travel needs. Because you are using your iPad, you can access your information in a cab, in a meeting, at the restaurant.

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

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About this Guide
This guide provides instructions for users to register, set up, and get started with Concur's mobile app.

Features

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<tbody>
<tr>
<td>• View your itinerary</td>
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<td>• Search for and book:</td>
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<tr>
<td>◦ Flight</td>
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<tr>
<td>◦ Hotel</td>
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<td>◦ Rental car</td>
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<tr>
<td>◦ Amtrak Direct Connect</td>
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<tr>
<td>• Check your flight status using FlightTrack</td>
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<td>• Check airport services and features with GateGuru</td>
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<tr>
<td>• Access Taxi Magic (available to US clients)</td>
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<td>• Access MetrO (ground transportation)</td>
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<td>• Map locations, obtain driving directions, view vendor details</td>
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<tr>
<th>If you use Expense, you can use your mobile device to:</th>
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<tr>
<td>• Add, edit, and delete out-of-pocket expenses</td>
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<tr>
<td>• Capture and upload receipt images</td>
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<tr>
<td>• View and edit downloaded card transactions</td>
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<tr>
<td>• Add attendees and itemizations to expenses</td>
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<tr>
<td>• Attach expenses to an expense report</td>
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<tr>
<td>• Create, view, edit, delete, and submit expense reports</td>
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<tr>
<td>• Approve or reject expense reports (for report approvers)</td>
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<tr>
<td>• Access Taxi Magic (available to US clients)</td>
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<tr>
<th>If you use Invoice, you can use your mobile device to:</th>
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<tbody>
<tr>
<td>• Approve payment requests (for request approvers)</td>
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User Roles and Permissions
Users with the Travel Wizard User role can access the Travel-related features.
Users with the Expense User role can access the Expense-related features.
Users with the Invoice approver role can approve payment requests.
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.

Logging On to Concur

Once you have downloaded the Concur app, locate the Concur icon on your iPad.

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.

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.
Trips

View Itineraries

You can view information about any of your trips.

1) Select the current trip on the Concur home screen.

To see a list of all trips, select the Trips icon.

2) Scroll to view all segments of the itinerary.
ADDITIONAL FLIGHT INFORMATION ON THE ITINERARY
**Book a flight**

To search for and book a flight:

- Use the **Book Air** button on the home screen
- Use the **Travel** icon on the menu (bottom of the screen) and then select **Air**

1. Enter the search criteria.
2. Select **Search**.
3. Select the desired carrier.
4. Select the desired flight.
5. Select **Reserve**.

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

Select ON for **Refundable Only** so the search results include only refundable fares.

If you have one or more frequent flyer programs, they appear here so you can select.
**Book a Rental Car**

To search for and book rental cars:

- Use the **Book Car** button on the home screen
  - or –
- Use the **Travel** icon on the menu (bottom of the screen) and then select **Car**
  - or –
- Use the **Book Car** button on an itinerary

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

1) Enter/Verify the location and dates, and then select your preference.
2) Select **Search**.
3) Select the car type.
4) Select **Reserve**.

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**Note about credit cards:**

*Ghost cards* are special credit cards used by some companies. *Ghost cards* cannot be used with Concur's mobile app.
**Book a Hotel**

To search for and book hotel:

- Use the **Book Hotel** button on the home screen – or –
- Use the **Travel** icon on the menu (bottom of the screen) and then select **Hotel** – or –
- Use the **Book Hotel** button on an itinerary

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

1) Enter/Verify the location and dates.
2) Select **Search**.
3) Select a hotel.
4) Select a room.
5) Select **Reserve**.

**View the map.**

**Note about credit cards:**

*Ghost cards* are special credit cards used by some companies. *Ghost cards cannot* be used with Concur’s mobile app.
ADDITIONAL INFORMATION ABOUT HOTELS

You can cancel the hotel reservation from the itinerary.

The prices that appear in the mobile app on the hotel page are the same as the web version of Concur:
- Green = the price is in-policy and can be selected.
- Yellow = your manager will be notified.
- Red = your manager must approve the trip.
- Gray (unavailable) = the price is out-of-policy and cannot be booked (such as room requiring deposit).

Use to change the sort order.

Use to review the cancellation policy.
Use Taxi Magic / MetrO / GateGuru

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.

To access these options:

- Use the Travel Apps menu on the Trips screen
- or -
- Use the Apps button on the home page
Book Amtrak Direct Connect

Use the Rail icon to book rail – if your company uses Amtrak Direct Connect.

1) Enter the search criteria.
2) Select Search.

The trip appears on your itinerary.

3) Select the train
4) Select the fare.
5) 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.
Expenses and Expense Reports

List of Expenses (Expenses screen)

Use the Expenses icon to access the Expenses screen. On the Expenses screen, you can:

- Add, view, edit, and delete Quick Expenses (expenses created on your iPad).

**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 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.
  - If you are allowed to delete card transactions in the web version of Expense, then you can delete them here, too.

- Attach expenses - both mobile and card - to a new or existing expense report.

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

Use the Reports icon 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:

- See the name, status, date, and amount of each report
- Delete a report
- Create a new report

Open a report to:

- 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

With a report open, use and at the top of the screen to navigate through your reports.
Create a Quick Expense

To add a Quick Expense:

- Use the + on the top of the Expenses screen - or -
- Use the Quick Expense button on the home screen

1) Select the date and the expense type.

2) Enter the remaining information.
3) Select Save.

When done, the new expense appears on the Expenses screen.

To add a more intricate expense (car mileage/kilometers, attendees, itemizations) - add the expense to an open expense 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.

1) On the Expenses screen, select Add to Report.

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

3) Select Add to Report.

4) Then:
   - To create a new report, select at the top of the screen.
   - or -
   - To add to an existing report, select the report.

**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 Expense, then you can delete them here, too.

1) On the Expenses screen, select Edit.

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

3) Select Delete.
Add a Car Mileage/Kilometer Expense

To add a personal car mileage expense:

- Use the **Personal Car Mileage** button on the home page - or -

- Use **Add New Expense** on an open report

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.

1) When you select **Personal Car Mileage** on the home screen, you are prompted to create a new report or select an existing report.

2) After you create a new report or select a report, the **Add Car Mileage** screens appears.

3) Enter the required information.

4) Select **Save**.

The other way to create a personal car expense – with a report open, select **Add New Expense**. Select the **Personal Car Mileage** expense type. (Your company may use a different expense type name.) The page refreshes, showing the **Add Car Mileage** page.

Expense calculates the amount based on the distance and rate. The expense appears on the report.
Itemize an Expense on an Expense Report

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

1) Open a report and open the expense to be itemized.

2) Select Itemize.

3) Enter the dates and rates and then complete the remaining fields.

4) Select Save.

5) Expense creates the expenses and indicates if there is a remaining amount to be itemized. If so, select at the top of the screen.

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 full-featured, web version of Expense, only certain expense types require attendees.) You can:

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

**NOTE:** Mobile 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 not include the expense user as an attendee. For these activities, use the web version of Expense.

1. Open the report and open the expense.
2. Select Attendees.
3. Select + at the top of the screen.
4. Select the desired method. (Each method is described on the following pages.)

If the expense already has attendees, they are all listed here.
ADD ATTENDEE - BUMP

You can add an attendee using the "bump" feature if the other person (attendee) also uses Expense on an iPhone, iPad, or iPod touch.

1) Select **Add Attendee via Bump**.

At the same time ... the attendee selects the **Attendee** icon on the home page.

2) You and the attendee then bump your phones together to transfer the information. The attendee is added to the expense and to your favorite attendee list.

The attendee selects **Become an Attendee**.
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) Select the appropriate attendee type and then complete the remaining fields.

3) Select **Save**.

**ADD ATTENDEE - SEARCH**

You can search for attendees.

1) Select **Search for Attendee**.

2) Select **Quick Search** or **Advanced Search**.
   - Use **Quick Search** to quickly find an attendee in your Favorite attendees list.
   - Use **Advanced Search** for a more extensive search.
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.

Make the desired changes, and then select Save.

For expenses or reports, any field with a can be edited.

Lists (like City or Vendor) contain the same data as the full-featured, web version of Expense.

View and Edit the Report Summary (Report Header)

You can view and edit the report header information.
**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 an expense created from a card transaction, it is not really deleted; it is moved back to the pool of expenses on the *Expenses* screen.

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.)

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**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 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 + on the top of the screen.

2) Complete the Create Report screen.

3) Select Save.

4) On the open report, create a new expense or import from the expense list.
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 the 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.)

1) Swipe the unsubmitted report.
2) Select Delete.
**Work with Receipts**

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

If attaching to a report:
1) Open the report and select **Attach Receipt**.
2) Select either **Attach via Photo Album** or **Receipt Store**.

If attaching to an expense entry:
1) Open the report and the expense entry.
2) Select **Receipt**.
3) Select either **Attach via Photo Album** or **Receipt Store**.
Approvals

Expense Reports
If you are an approver, use the Approvals icon to access the reports that require your approval.

1) Open the expense report to be reviewed.

2) View expense entry detail, attendee information (if any), itemizations (if any), exception information (if any), receipt images, and header details.

3) Select Approve Report or Send Back.
   If you select Send Back, you will be prompted to enter a comment.
**Invoice**

If you are an Invoice approver, use the **Invoice** icon to access the payment requests that require your approval.

1) Open the request to be reviewed.
2) Review the summary (header) information, the line-item detail, images, and the vendor information.

3) Select **Approve** or **Send Back**.

If you select **Send Back**, you will be prompted to enter a comment.
Miscellaneous

Save Login ID and Auto Login

1) On the home screen, select **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**

On the home screen, select **Settings**. On the **Settings** screen, change the **Show Twitter** setting to **OFF**.