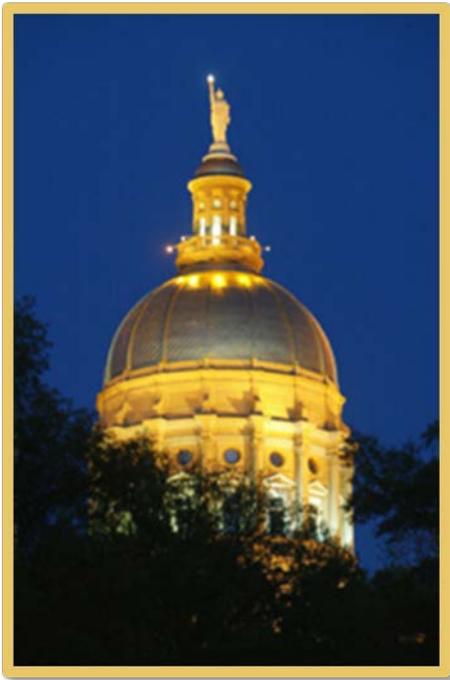


# Introduction to Mobile – iPhone-TTE



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## Overview

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, rental car, or hotel; and view maps and directions from your current location.

## Feature List

<p><b>In Travel, you can:</b></p> <ul style="list-style-type: none"> <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>	<p><b>In Expense, you can:</b></p> <ul style="list-style-type: none"> <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>
<p><b>If you use Travel Request, you can:</b></p> <ul style="list-style-type: none"> <li>• Approve travel requests (if you are an approver)</li> </ul>	<p><b>In Locate &amp; Alert, you can:</b></p> <p>Check in</p>

## 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 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.

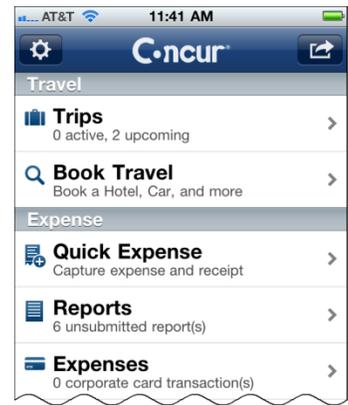
**1) Create your mobile PIN.**

**2) To obtain the app, go to the App Store - Use these search terms: Concur, Concur Mobile, Cliqbook, travel, expense, hotel, 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.



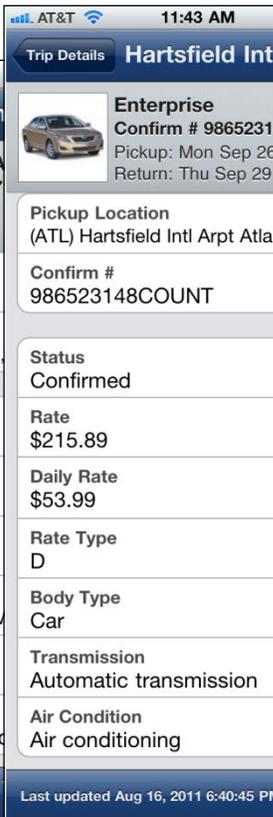
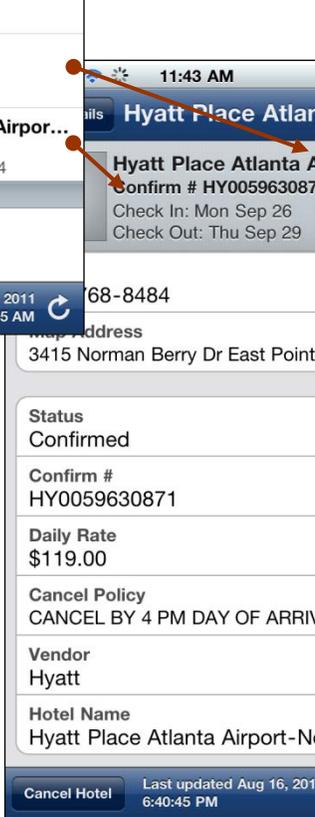
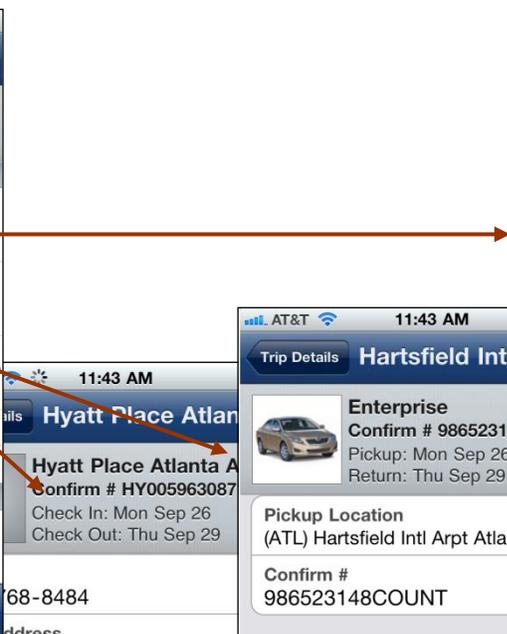
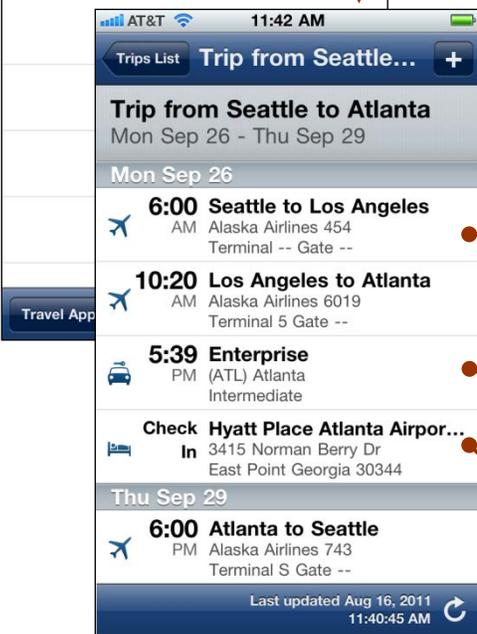
## Trips



### View Itineraries

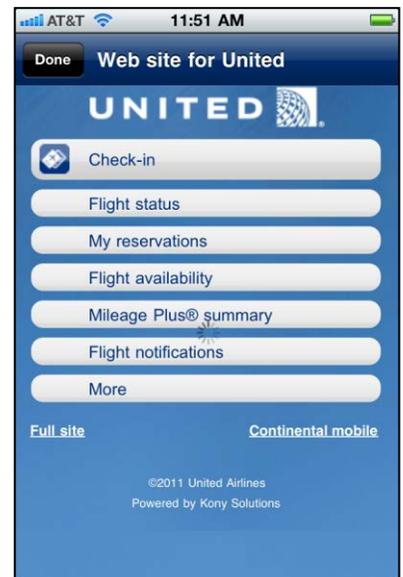
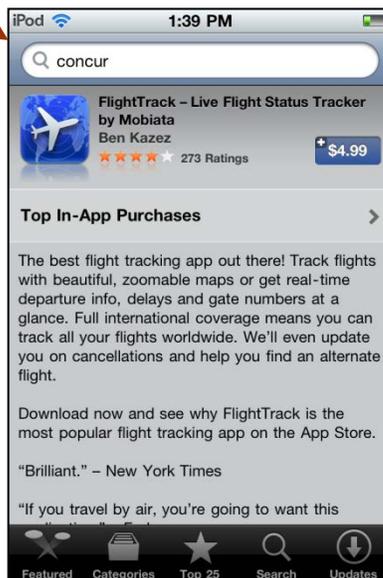
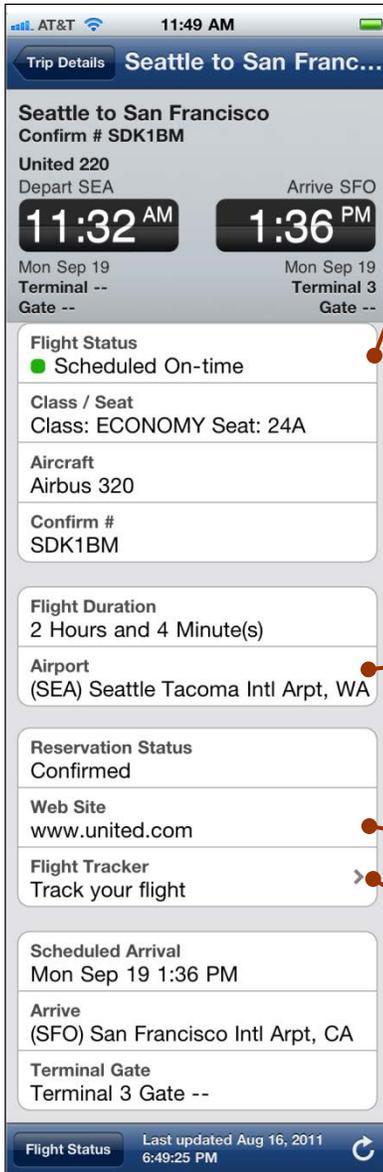
To view information about your trips, select **Trips** on the home screen.

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

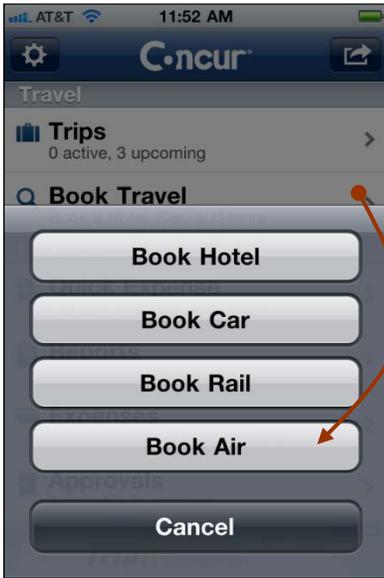


## FLIGHT INFORMATION

Access additional information from the flight screen.



# Book a Flight

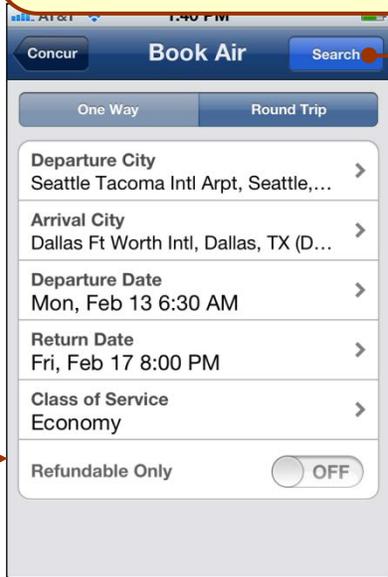


Book a flight by selecting **Book Travel** on the home screen and then **Book Air**.

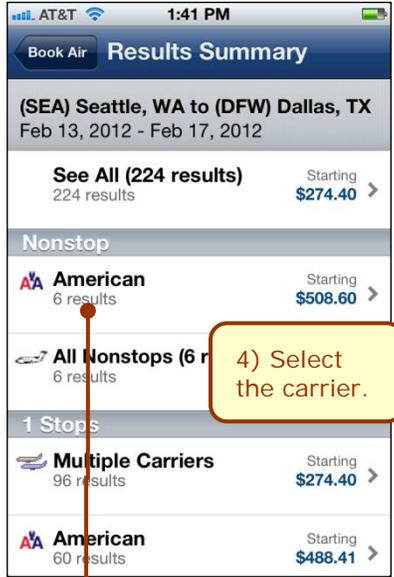
**NOTE:** Your agency's configuration may prevent you from booking flights. Check with your Concur administrator.

- 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.



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



- 4) Select the carrier.

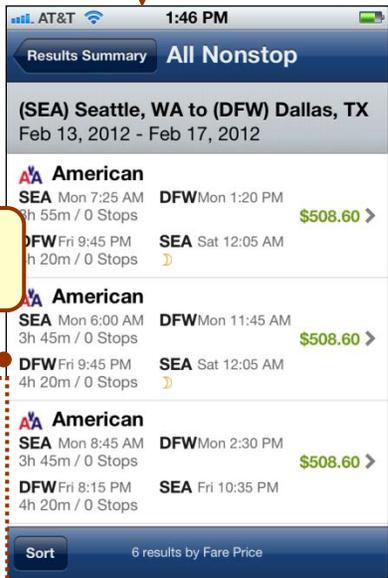


- 6) Complete all other required fields and questions.
- 7) Select **Reserve**.

- 5) Select the flight.

Note the following:

- Airfare is paid directly by the state on the AirPlus card. There is no out of pocket.
- If you have one or more frequent flyer programs, they will appear on this screen so you can choose.



Change the sort order.

## 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**

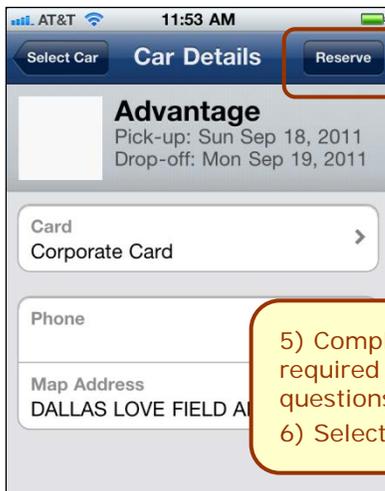
**NOTE:** If you add a car from the itinerary, the airport and pick-up/drop-off dates are pre-populated.



- 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**.

Select to change the sort order.



Hertz and Enterprise are under contract with the state and are direct billed to your agency. There is no out of pocket for rental from them.

## 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.

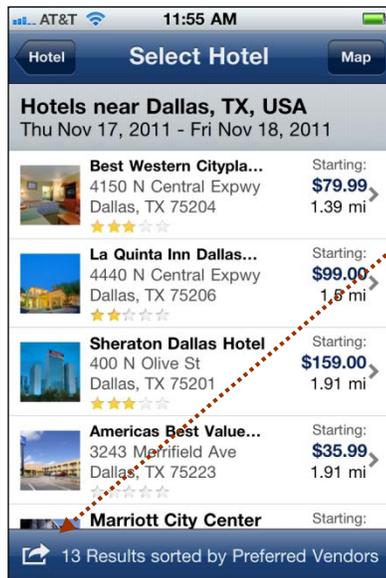
7) Select a room.

8) Complete all other required fields and questions.  
9) Select **Reserve**.

*Personal credit cards are used to book Hotels in TTE. You may use any form of payment when you check out of the hotel; it does not have to be the credit card you held the reservation with*

## MORE INFORMATION ABOUT HOTELS

On the **Select Hotel** screen...



Change the sort order.



Cancel the hotel, if necessary.



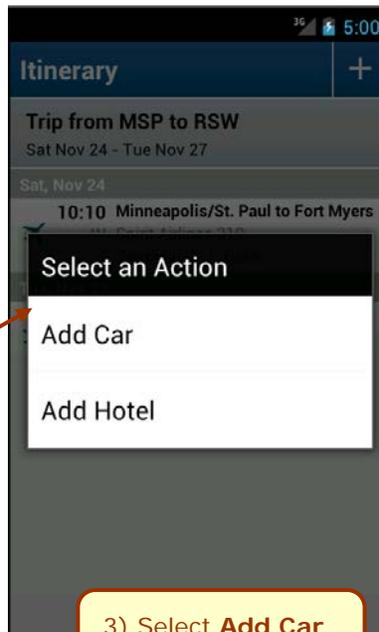
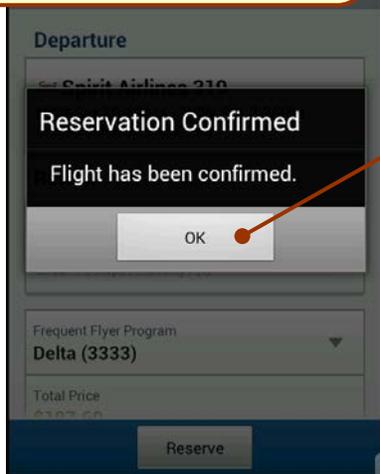
On the reservation screen...



### Shortcut for Car and Hotel

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

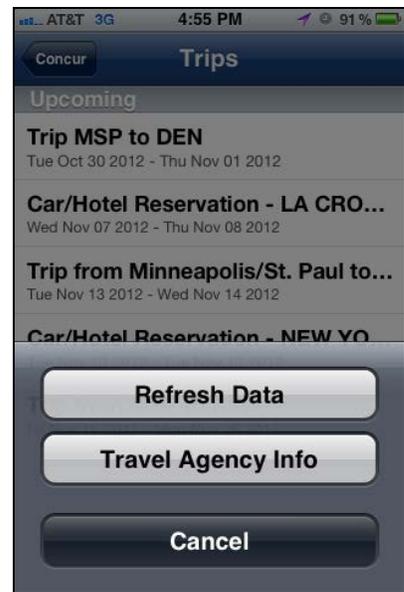
- 1) When you select **Reserve** when booking the flight, a confirmation message appears.
- 2) Select **OK**.



- 3) Select **Add Car** or **Add Hotel**.

### View Agency Contact Information

On the **Trips** screen, access the menu and select **Travel Agency Info**.



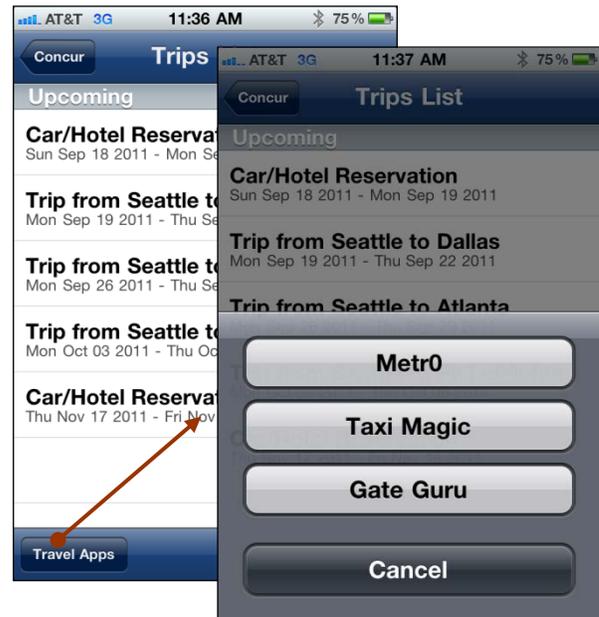
## Use Taxi / Metro / GateGuru

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.



## Expenses and Expense Reports

### List of Expenses (the Expenses Screen)

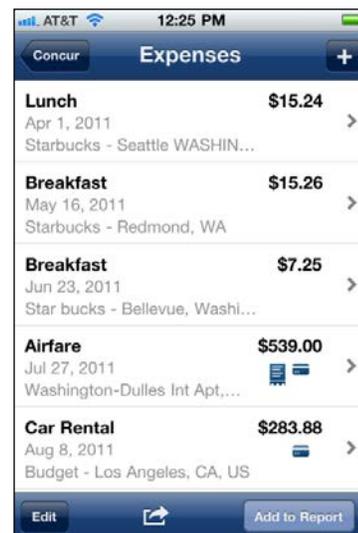
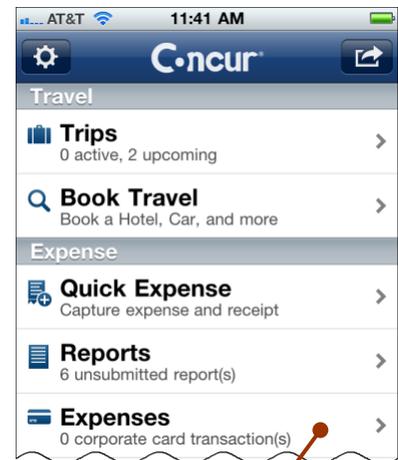
Select **Expenses** on the home screen to access the **Expenses** screen. On the **Expenses** screen, you can:

- 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.



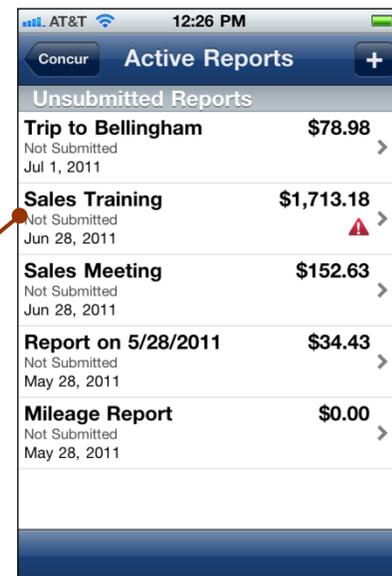
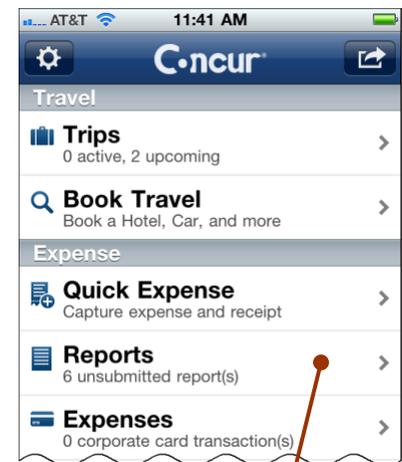
## List of Reports (the Active Reports Screen)

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)

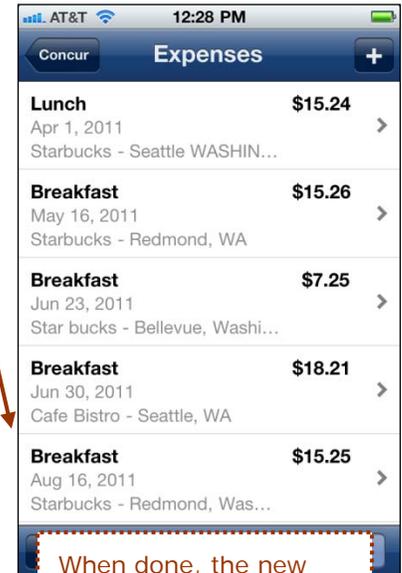
To add a more intricate expense (car mileage/kilometers, attendees, itemizations), add the expense to an open report.



1) Select **Quick Expense**.



2) Enter the required information and attach the receipt image.  
3) Select **Save**.

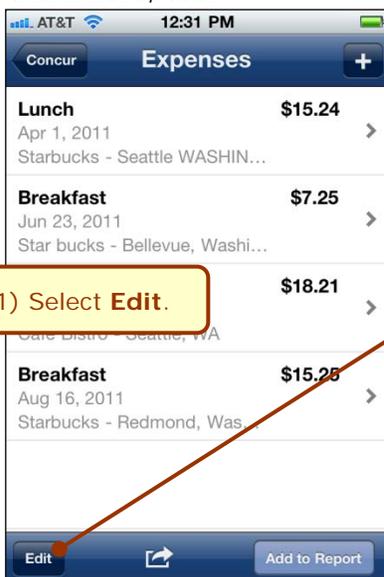


When done, the new expense appears on the **Expenses** screen.

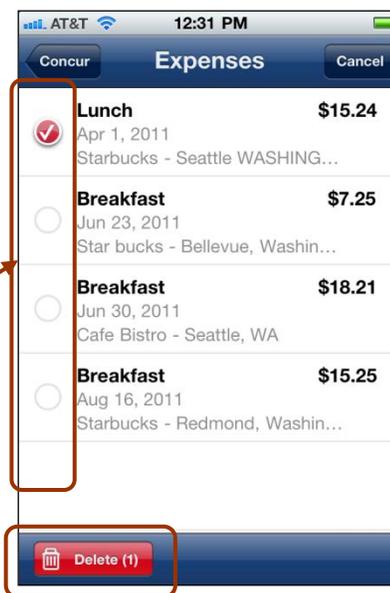
## Delete an Expense from the Expenses Screen

You can delete Quick Expenses from the **Expenses** screen. NOTE: Meals Per Diem are added via the Travel Allowance Wizard and are not entered as an actual cost expense.

**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  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.



NOTE: Most agencies enter Meals Per Diem and not actual expense meals. Please use the Travel Allowance wizard to do this.

## Add a Personal Car Mileage Expense

You can add Personal car mileage expenses.

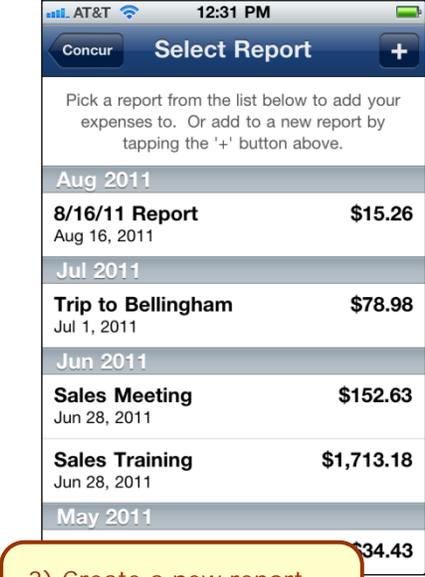
There are two ways to add a personal car mileage expense:

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

- 4) Select correct Vehicle ID
- 5) Create the expense. Complete the fields on the **Add Car Mileage** screen.
- 6) Select **Save**.



**Method #1:**  
 1) On the home screen, select to access the menu.  
 2) Select **Car Mileage**.

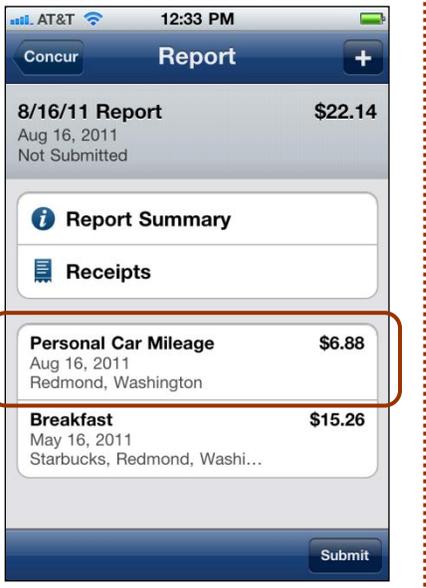
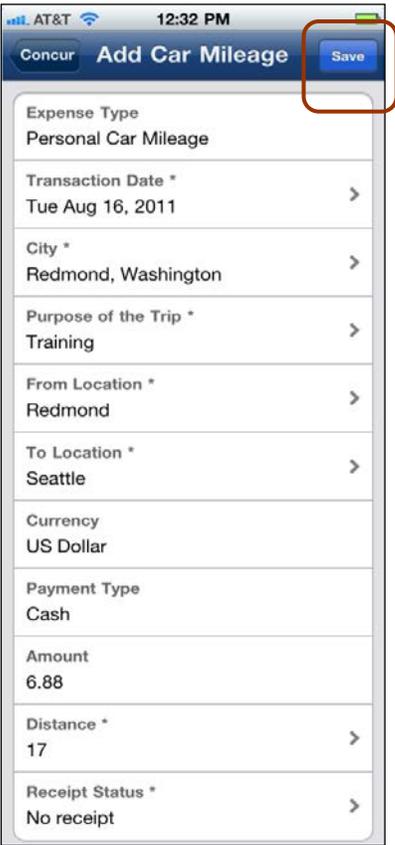


3) Create a new report or select an existing report.

**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.)



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

## Add a Company Car Expense



Add company car expense just like any other expense.

- 1) Open a report, select  to access the menu.
- 2) Select **Add New Expense**.
- 3) On the expense screen, select the *Company Car Use* expense 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.

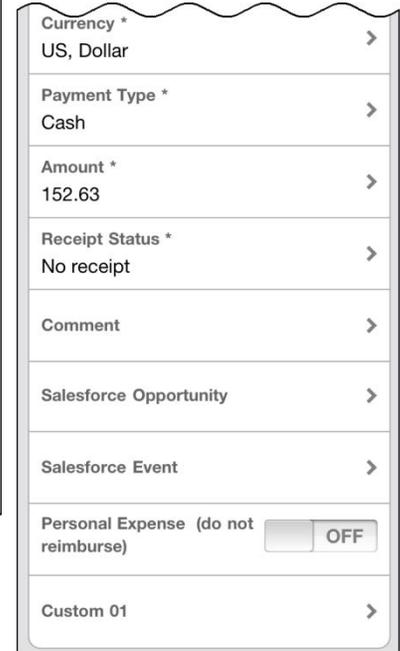
Open a report and select an expense. The **Expense Details** screen appears.



- 1) Open the report and open the expense.



- 2) Make the desired changes.
- 3) Select **Save**.



## Itemize an Expense on an Expense Report

You can itemize an expense if the expense is attached to an expense report. Hotel expenses **MUST** be itemized.

Expense...

Check-in Date \*  
Fri Aug 12, 2011

Check-out Date \*  
Tue Aug 16, 2011

Number Of Nights  
4

Room Rate \*  
175.00

Room Tax  
25.00

Additional C

Expense Type

Amount  
0.00

Expense Type

Amount  
0.00

Itemized: \$0.00  
Remaining: \$823.81

3) Enter the dates and rates, and complete the remaining fields.  
4) Select **Save**.

Report Expense Details Save

Room Rate \$823.81  
Jun 23, 2011  
Residence Inns, Sacramento, California

Itemize

Receipt

Itemizations are required for this entry.

Expense Type \*  
Room Rate

Transaction Date  
Thu Jun 23, 2011

2) Select **Itemize**.

Active Re... Report +

Sales Training \$1,713.18  
Jun 28, 2011  
Not Submitted

Report Summary

Receipts

Room Rate \$823.81  
Jun 23, 2011  
Residence Inns, Sacramento,...

Car Rental \$375.35  
Jun 23, 2011  
Enterprise, Smithfield, North...

Business Meal (attendees) \$153.62  
Jun 22, 2011

1) Open the report and open the expense.

The remaining amount equals zero.

Expense... Itemizations +

Room Rate \$175.00  
Aug 15, 2011 - Residence In...

Room Tax \$25.00  
Aug 15, 2011 - Residence In...

Room Rate \$175.00  
Aug 14, 2011 - Residence In...

Room Tax \$25.00  
Aug 14, 2011 - Residence In...

Room Rate \$175.00  
Aug 13, 2011 - Residence In...

Room Tax \$25.00  
Aug 13, 2011 - Residence In...

Room Rate \$175.00  
Aug 12, 2011 - Residence In...

Itemized: \$823.81  
Remaining: \$0.00

6) Itemize the remaining amount.  
7) Select **Save**.

Expense... Itemizations +

Room Rate \$175.00  
Aug 15, 2011 - Residence In...

Room Tax \$25.00  
Aug 15, 2011 - Residence In...

Room Rate \$175.00  
Aug 14, 2011 - Residence In...

Room Tax \$25.00  
Aug 14, 2011 - Residence In...

Room Rate \$175.00  
Aug 13, 2011 - Residence In...

Room Tax \$25.00  
Aug 13, 2011 - Residence In...

Room Rate \$175.00  
Aug 12, 2011 - Residence In...

Itemized: \$800.00  
Remaining: \$23.81

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.

Itemizations Itemization Save

Currency  
US, Dollar

Payment Type  
IBCP

Amount \*  
23.81

Receipt Status \*  
No receipt

Comment

Personal Expense (do not reimburse)  OFF

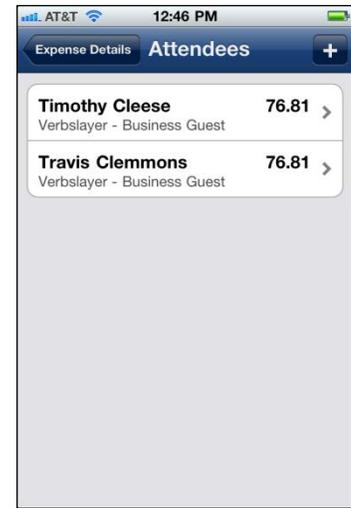
Itemized: \$800.00  
Remaining: \$23.81

## 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 agency's attendee list; search and select from an external source (like Salesforce)

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



### GETTING STARTED

1) Open the report and open the expense.

2) Select **Attendees**.

3) Select **Add Attendee**.

4) Select the desired method.

If the expense already has attendees, they are listed here.

The screenshots show the following flow: 1. A 'Report' screen with a list of expenses. The 'Business Meal (attendees)' expense is selected. 2. The 'Expense Details' screen for the 'Business Meal' expense, with the 'Attendees' option selected. 3. The 'Attendees' screen with the 'Add Attendee' button highlighted. 4. A modal menu with options: 'Select from Contact', 'Add Attendee Manually', 'Search for Attendee', and 'Cancel'.

## 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.

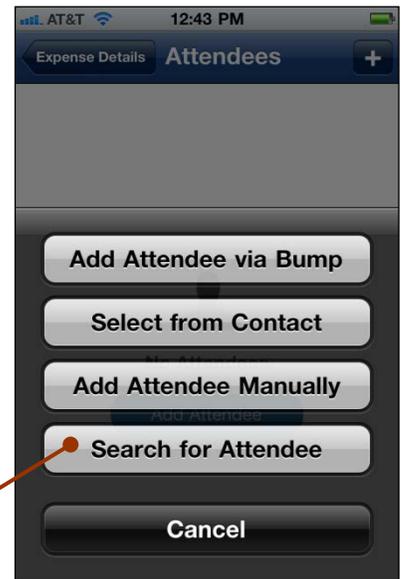
1) Select **Add Attendee Manually**.

2) Enter the required attendee information.  
3) Select **Save**.

## ADD ATTENDEE - SEARCH

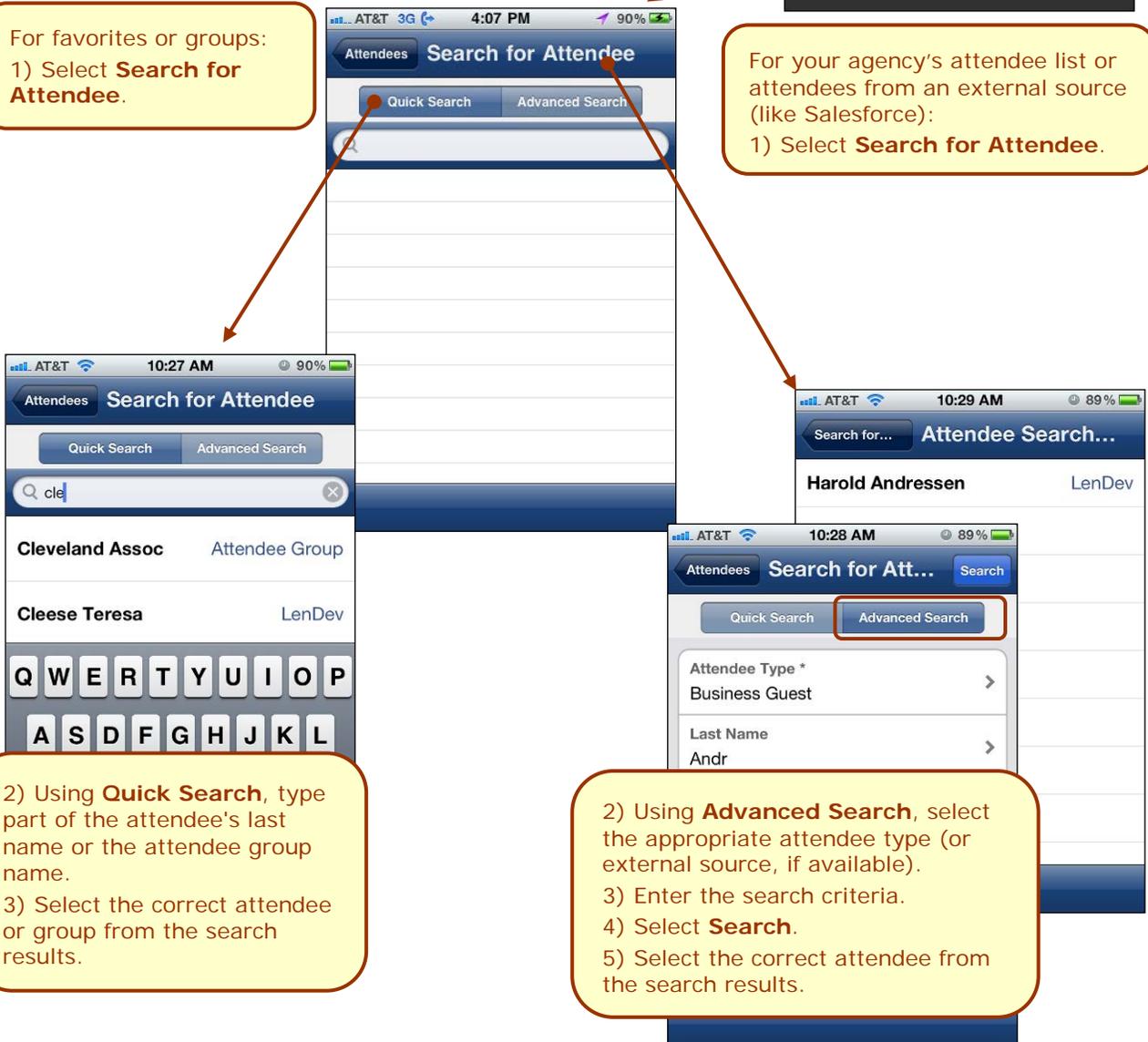
You can search for:

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



For favorites or groups:  
1) Select **Search for Attendee**.

For your agency's attendee list or attendees from an external source (like Salesforce):  
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.

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

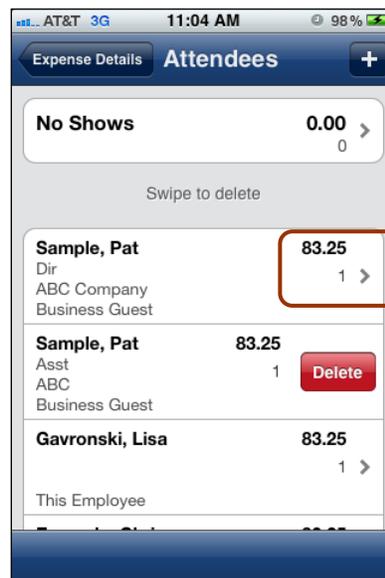
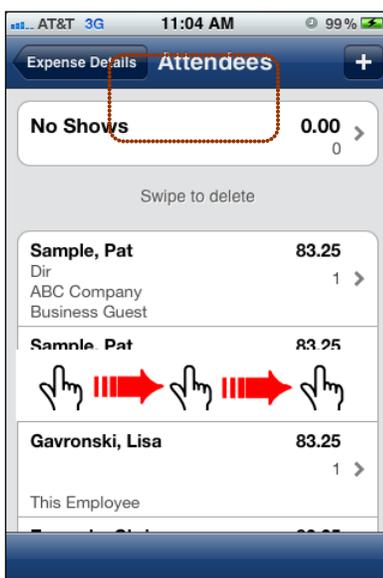
If your company is using these attendee-related features in the web version of Concur, then they are also available in the mobile app:

- 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.

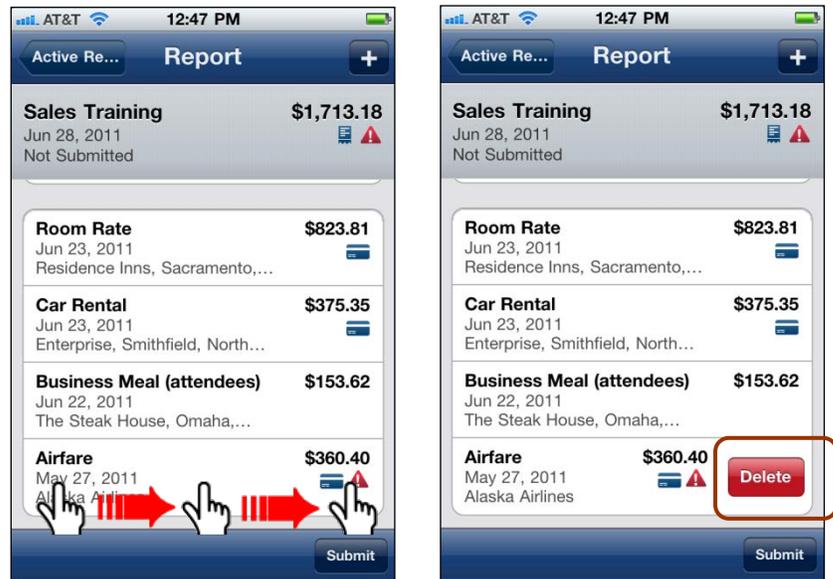


## Remove an Expense from an Expense Report

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

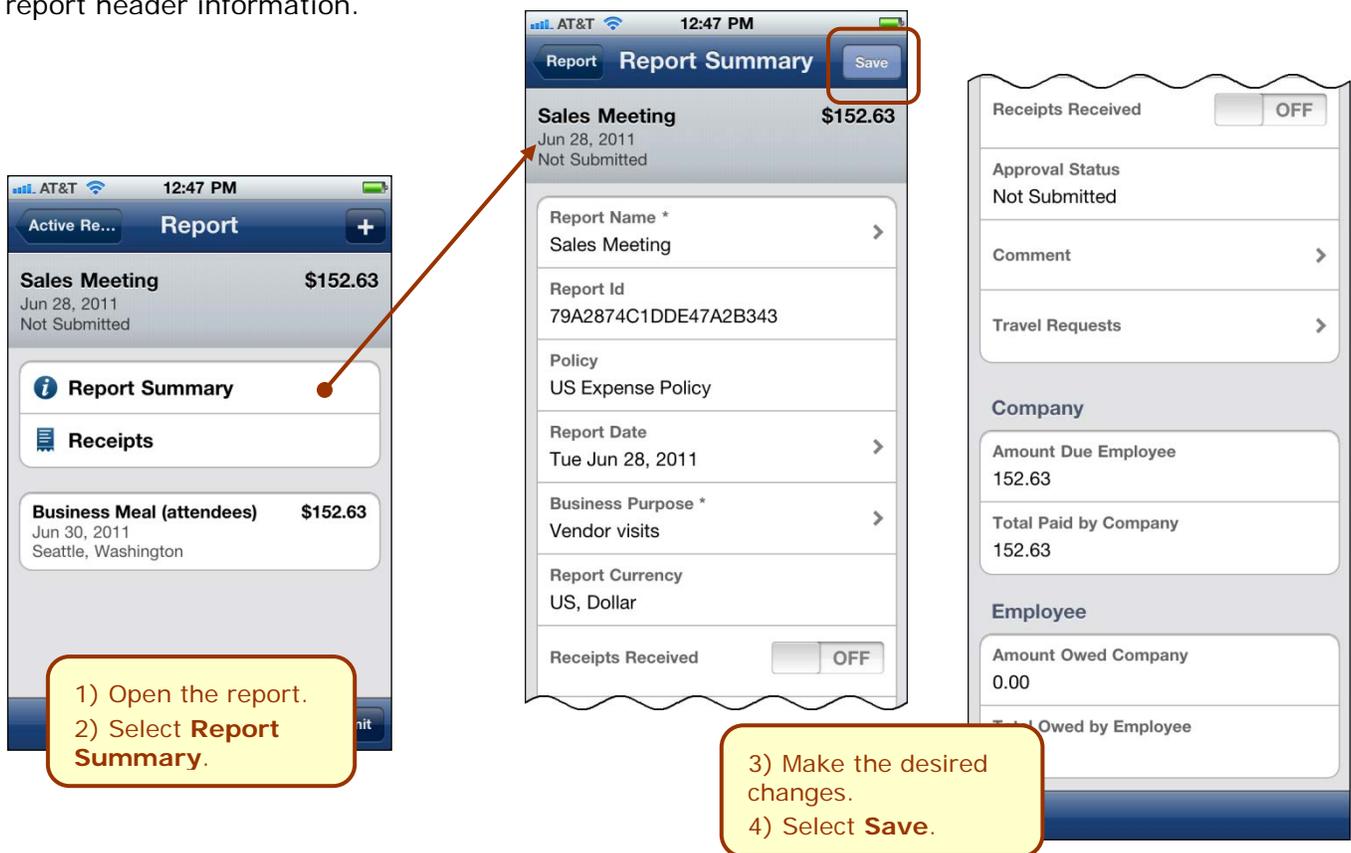
**NOTE:** If you delete a Quick Expense or a card transaction from an expense report, it is not really deleted; it is moved back to your pool of expenses on the **Expenses** screen. (Any receipts associated with Quick Expenses or card transaction expenses remain as well.)

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.)



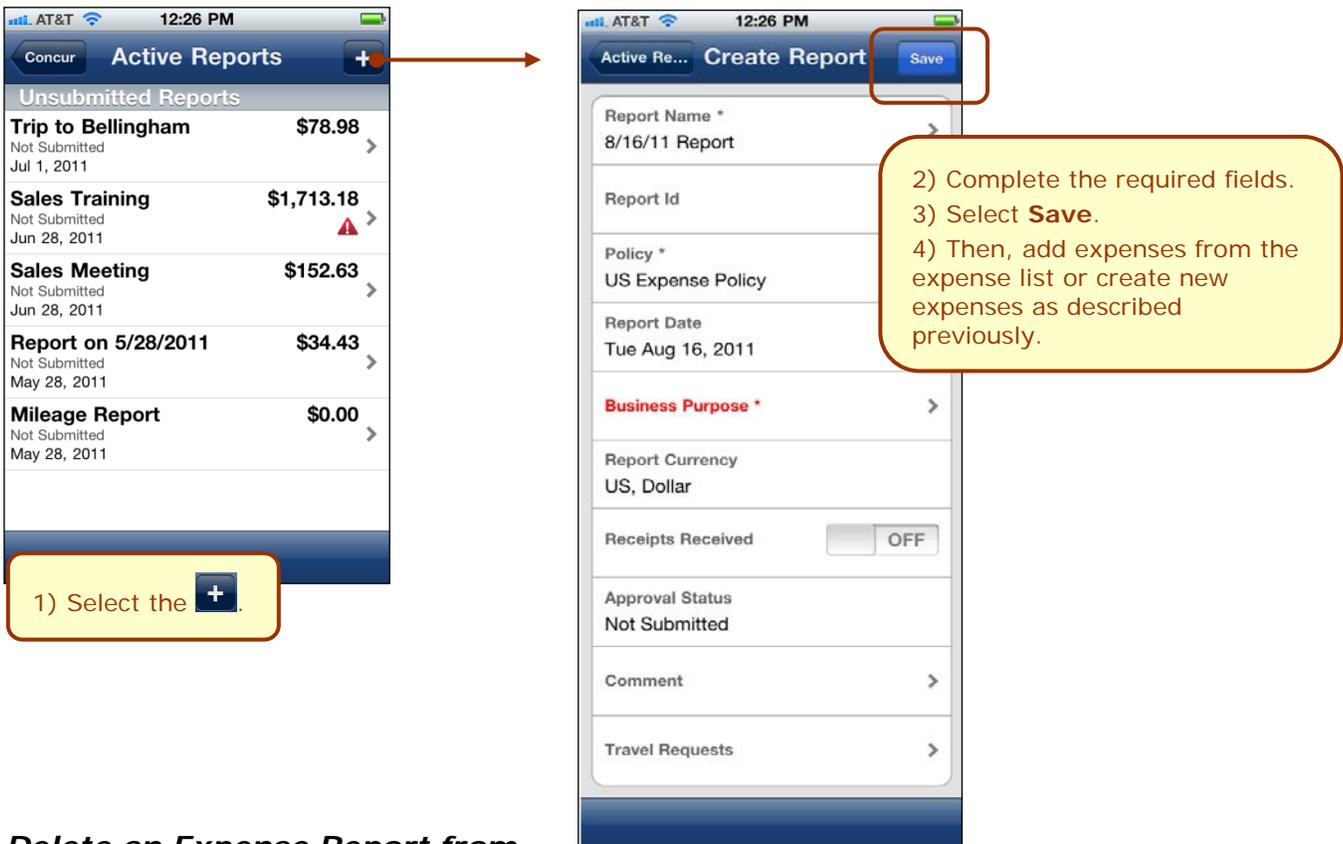
## View and Edit the Report Summary (Report Header)

You can view and edit the report header information.



## 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.

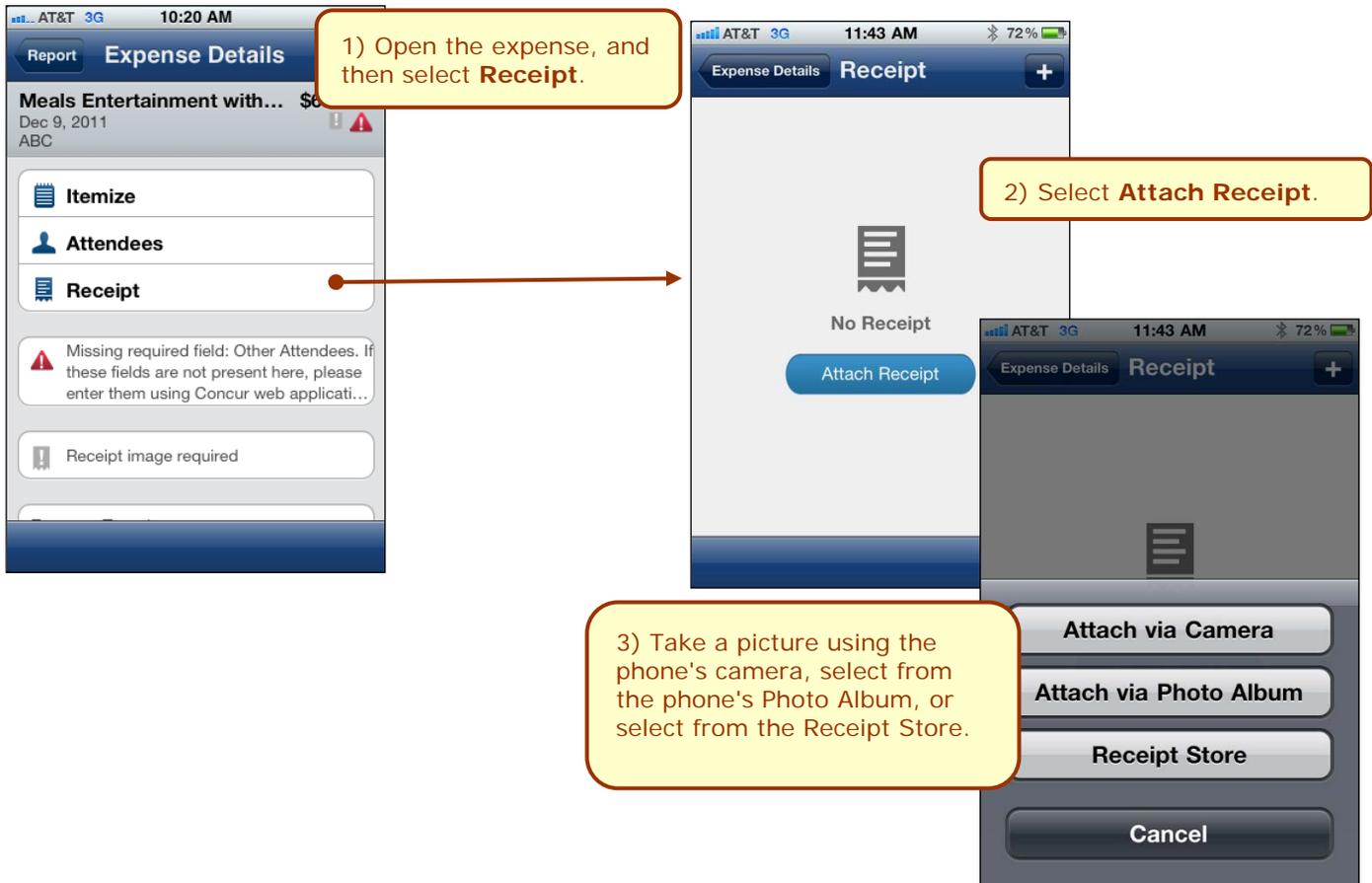
**NOTE:** If you delete a report that contains Quick Expenses or expenses created from card transactions, the Quick Expenses and card transaction expenses are not really deleted; they move back to your pool of expenses on the **Expenses** screen. (Any receipts associated with Quick Expenses or card transaction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



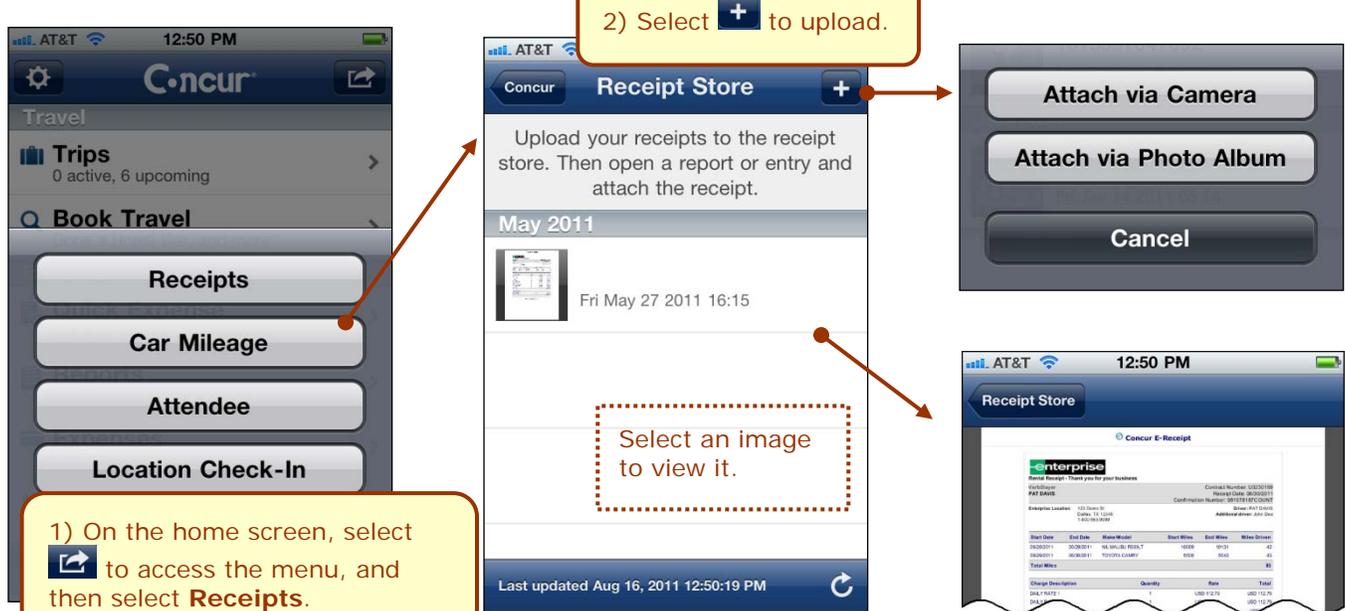
1) Open the expense, and then select **Receipt**.

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.

The screenshots show the 'Expense Details' screen with the 'Receipt' option selected, the 'Receipt' screen with the 'Attach Receipt' button, and the 'Attach Receipt' modal with options for 'Attach via Camera', 'Attach via Photo Album', 'Receipt Store', and 'Cancel'.

## UPLOAD TO THE RECEIPT STORE



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

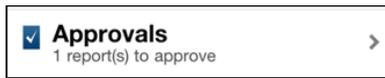
2) Select  to upload.

Select an image to view it.

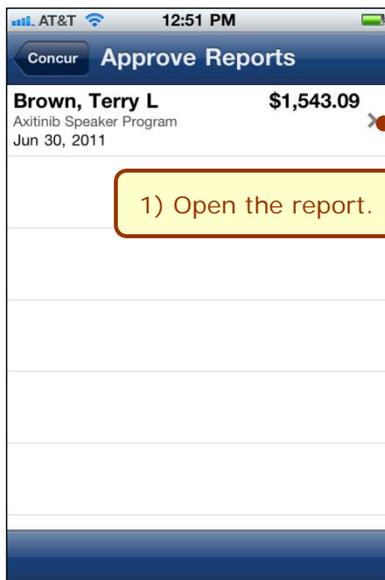
The screenshots show the home screen with the 'Receipts' option selected, the 'Receipt Store' screen with the 'Upload your receipts to the receipt store...' instruction and a '+', and the 'Receipt Store' screen displaying a receipt from Enterprise.

## Approvers

### 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).

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

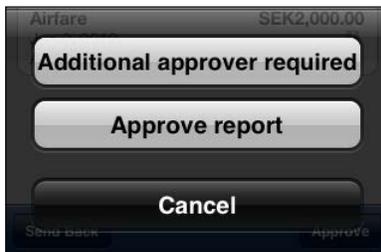


3) Review the expense details, including attendees (if any), itemizations (if any), and receipts (if any).

Depending on your configuration, you may be able to bypass any remaining approvers and send the expense report directly to Accounting Review.

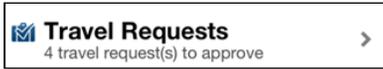
If so, when you select **Approve**, this menu appears.

Select one of these:

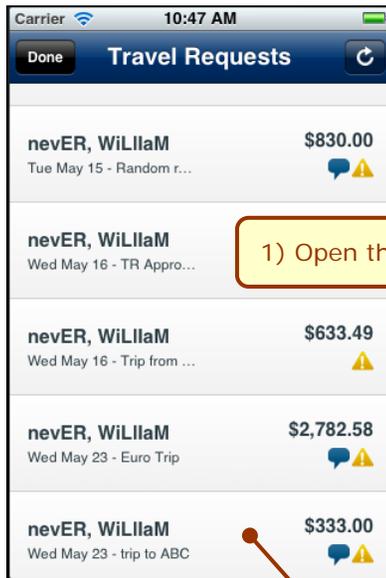


- Select **Additional approver required** to approve the report and send the report to the next approver in the workflow.
- Select **Approve report** to approve the report and send it directly to Accounting Review.
- Select **Cancel** to return to the previous screen (with the **Send Back** and **Approve**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

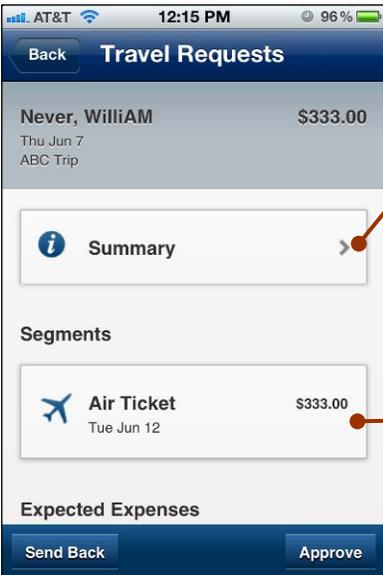
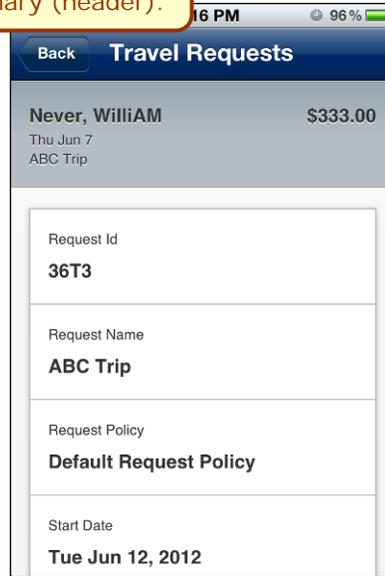
## Approve Requests (for the Request Approver)



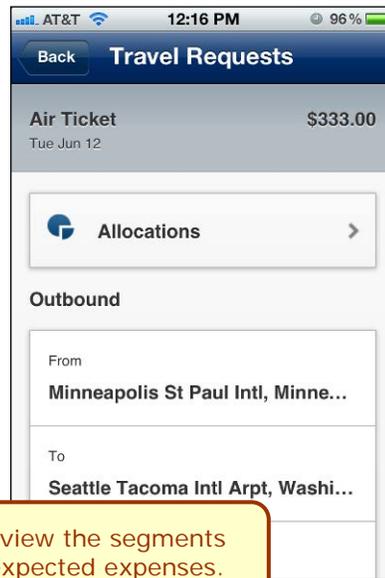
Select **Travel Requests** on the home screen to access the **Travel Requests** screen.



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.

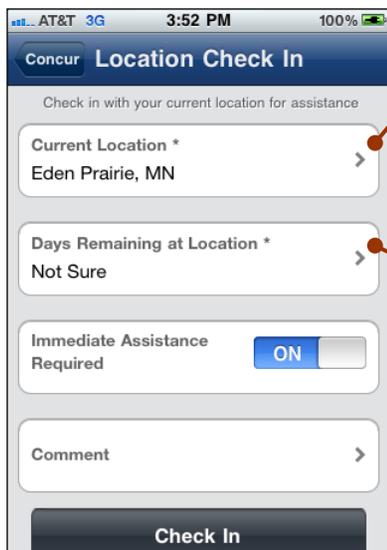
## Miscellaneous

### Use Locate & Alert

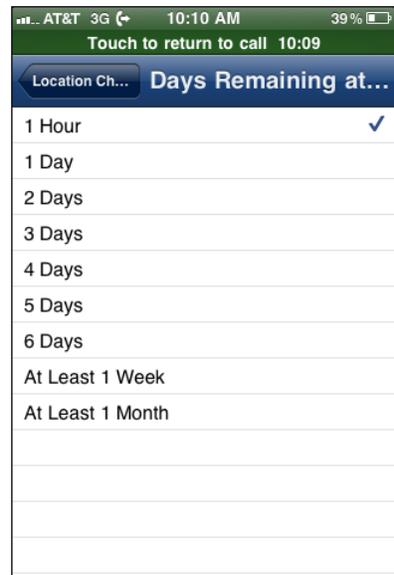
If your company uses Concur's Locate & Alert service, you can check in via the iPhone.



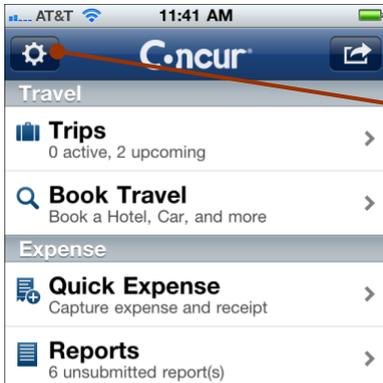
1) On the home screen, select (upper right corner) and then select **Location Check In**.



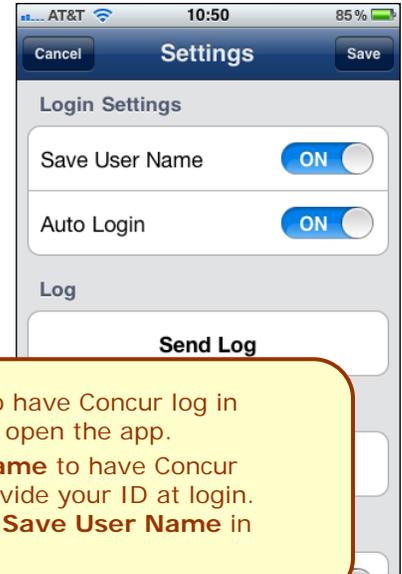
- 2) On the **Location Check In** screen:
- Select your current location
  - Select the number of days remaining at that location
  - Indicate whether immediate assistance is required
  - Enter a comment, if desired
- 3) Select **Check In**.



## Save Login ID and Auto Login



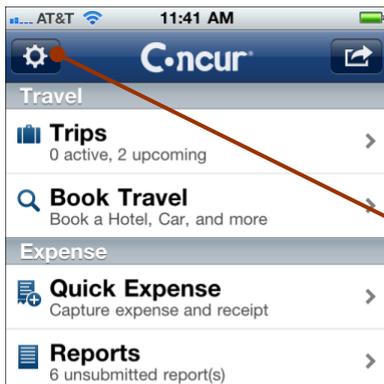
1) Select  to access **Settings**.



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.