

Introduction to.....

Concur Mobile

June 15 2009

Applies to these Concur solutions:

- Expense in Concur Travel & Expense
- Concur Cliqbook Travel
- Concur Cliqbook Travel in Concur Travel & Expense
- Concur Invoice

You can use Concur Mobile on your hand-held device (smartphone) to assist with your Expense and Travel needs. Because you are using your smartphone, you can access your Expense and Travel 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. You can check your itinerary, reserve a car, check the status of your expense reports, finish your expense report approvals, and make a dinner reservation.



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About this Guide

This guide provides instructions for users to set up and use Concur Mobile.

All sample screen shots show the Blackberry Curve and Blackberry Bold. Your device may look slightly different.

Overview

Feature List

Concur Mobile is available for use with Concur Expense and/or Concur Cliqbook Travel.

If you use Concur Cliqbook Travel, you can use Concur Mobile to:

- View your itinerary
- Complete online check-in
- Check your flight status
- Check weather conditions
- Search flight schedules
- View seat availability
- Search, book, and cancel:
 - ◆ Dining
 - ◆ Hotel
 - ◆ Rental car
 - ◆ Taxi
- View vendor details
- Capture policy violations
- Call:
 - ◆ Travel agent
 - ◆ Hotel
 - ◆ Restaurant
 - ◆ Taxi
 - ◆ Rental car
- Map locations for:
 - ◆ Hotel
 - ◆ Dining
 - ◆ Car rental
- Obtain driving directions

If you use Concur Expense, you can use Concur Mobile to:

- Add, edit, and delete out-of-pocket expenses
- Capture and upload receipt images
- View your expense report status and details
- View expense entries
- Approve or reject expense reports (if you are a report approver)
- Search for taxi and dining

Devices

Currently, Concur Mobile can be used with the Blackberry (OS 4.2 or higher) or Windows Mobile (OS 6.0 and higher). If your device does not have the appropriate operating system, upgrade as per normal procedures, which may involve contacting your cell provider.

User Roles and Permissions

The only required permissions/roles are that of Travel User and/or Expense User.

Setting Up Concur Mobile

If Concur Mobile has been activated by Concur for your company and if you have the Travel User and/or Expense User role, then **Concur Mobile Registration** appears in the **Other Settings** section of the left menu on your profile page.

The screenshot shows the Concur Mobile Registration page. The left sidebar has 'Concur Mobile Registration' highlighted. The main content area is titled 'Concur Mobile Registration' and includes a 'Welcome To Concur Mobile' section, a 'What is Concur Mobile?' section with images of mobile devices, and a 'Concur Mobile Check List' section. The check list shows the following items:

- Valid Credit Card found.
- Valid Billing Address found.
- Valid Home Address missing.
- Valid Mobile Phone missing.
- Valid Mobile Carrier missing.

Below the list is a 'Warning' message: 'Warning: One or more of these settings is missing or invalid. Access your profile and make the appropriate corrections before attempting to use Concur Mobile. [Go to the Profile page](#)'.

Step 1: in this section indicates missing profile information. Click **Go to the Profile page** to provide the missing information.

When all are resolved, two more sections appear on your profile page.

The screenshot shows the Concur Mobile Registration page with the 'Concur Mobile Check List' section now showing all items as found. Below it are two new sections: 'Concur Mobile Launch Instructions' and 'Concur Mobile Login and PIN'.


Concur Mobile Launch Instructions: This section provides instructions on how to install Concur Mobile on a mobile device. It includes a 'Send Instructions' button.

Concur Mobile Login and PIN: This section shows a login screen for a BlackBerry device. It includes fields for 'User Name' (pre-filled with 'Chris.Miller@lende.com') and 'Mobile PIN', along with a 'Set Mobile PIN' button.

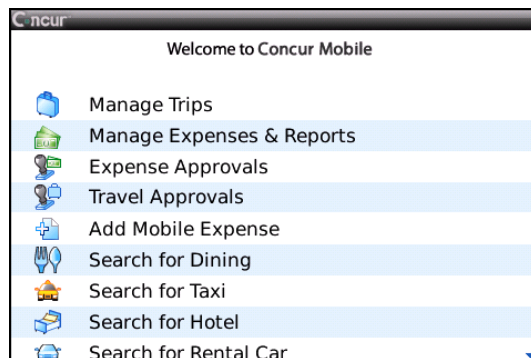
Step 2: Obtain your launch instructions using this URL or have them emailed to you. Follow the launch instructions and then return to this profile page.

Step 3: Set your numeric Mobile PIN. You can now log on to Concur Mobile on your hand-held device using the User Name and PIN shown in this section.

Logging On to Concur Mobile

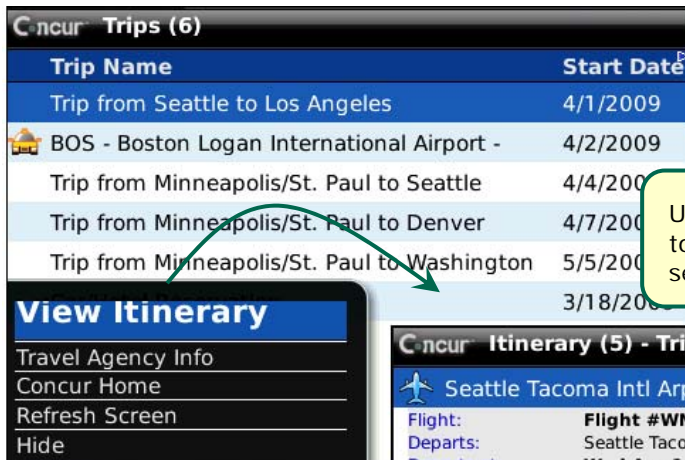
 Locate the Concur Mobile icon, which may be on the main screen of your device or in your device's folder for downloads.

Start the application, log in, and access the Concur Mobile menu.




Manage Trips

On the Concur Mobile menu, select **Manage Trips**. A list of your upcoming trips appears.




Concur Trips (6)

Trip Name	Start Date
Trip from Seattle to Los Angeles	4/1/2009
 BOS - Boston Logan International Airport -	4/2/2009
Trip from Minneapolis/St. Paul to Seattle	4/4/2009
Trip from Minneapolis/St. Paul to Denver	4/7/2009
Trip from Minneapolis/St. Paul to Washington	5/5/2009
	3/18/2009


View Itinerary

- Travel Agency Info
- Concur Home
- Refresh Screen
- Hide





Use the menu on this page to view your itinerary for the selected trip.



Concur Itinerary (5) - Trip from Seattle to Los Angeles

 Seattle Tacoma Intl Arpt (SEA) to Los Angeles Intl (LAX)

Flight: **Flight #WN0712 Economy(Y)**
Departs: Seattle Tacoma Intl Arpt (SEA) Terminal
Departs at: **Wed Apr 1 - 10:25 AM**
Arrives: Los Angeles Intl (LAX) Terminal 2
Arrives at: Wed Apr 1 - 1:00 PM
Status: **Confirmed; JLN473**
Duration: 2 hours, 5 minutes; Stops: 1
Ticketing: E-Ticket; Seat:

 Connecting at Metro Oakland Intl Arpt(OAK) to Los Angeles
 Thrifty
 Los Angeles Intl (LAX) to Seattle Tacoma Intl Arpt (SEA)
 Connecting at Metro Oakland Intl Arpt(OAK) to Seattle Tacoma Intl Arpt (SEA)

On the **Itinerary** page...

Concur Itinerary (5) - Trip from Seattle to Los Angeles

Seattle Tacoma Intl Arpt (SEA) to Los Angeles Intl (LAX)

Flight #WN0712 Economy(Y)

Arpt (SEA) Terminal AM

X) Terminal 2

Stops: 1

Flight Schedule

- Flight Status
- Online Check In
- Weather
- Add Taxi To
- Add Taxi From
- Add Dining
- Add Hotel
- Add Rental Car
- Travel Agency Info
- Concur Home
- Hide

Use the menu on this page to:

- Check in online
- Check the flight schedule, seat map, and status
- Add/change/cancel a taxi/dining/hotel/rental car reservation
- Check the weather
- and more...

NOTE: The menu options change depending on the itinerary item you have selected. You will see different options for car, hotel, etc.

Dining

Access via the itinerary menu...

- Flight Schedule
- Flight Status
- Online Check In
- Weather
- Add Taxi To
- Add Taxi From
- Add Dining**
- Add Hotel
- Add Rental Car
- Travel Agency Info
- Concur Home
- Hide

or the main menu

- Manage Trips
- Manage Expenses & Reports
- Expense Approvals
- Travel Approvals
- Add Mobile Expense
- Search for Dining**
- Search for Taxi
- Search for Hotel
- Search for Rental Car

NOTE: An advantage of using the *itinerary* menu is that Concur Mobile prepopulates fields whenever possible.

NOTE: This link may appear for US clients only.

On the **Search for Dining** page...

Choose the desired search tab.
Then, enter or select the remaining search criteria.

Concur Search for Dining

Airport Location Company Location

Search by Airport

Los Angeles Airport, United States
e.g. 'BOS' or 'Boston Airport'

Date Time: Apr 1 2009 10:25 AM

Party Size: 1

Name:

Find restaurants within

Number: 5
Scale: miles

Price Range: Any Price

Cuisine: Any Cuisine

Concur Select Restaurant (23)

Find:

Restaurant	Price	Cuisine
Capistrano's - El Segundo 1440 E. Imperial Ave El Segundo, CA 1.01 Mile(s) away	\$\$	Californian
Proud Bird	\$\$	American
Piknic	\$\$	Californian
Pancho's	\$\$	Mexican / Sou
Second Story - Hotel Belamar	\$\$\$	Contemporary
Sashi Sushi & Sake Lounge	\$\$\$	Japanese
Daily G		
Rock'n		

Later: 11:00 AM

Concur Select Restaurant (23)

Find:

Restaurant	Price	Cuisine
Capistrano's - El Segundo	\$\$	Californian
Proud Bird	\$\$	American
Piknic	\$\$	Californian
Pancho's	\$\$	Mexican / Southw
Second Story - Hotel Belamar	\$\$\$	Contemporary An
Sashi Sushi & Sake Lounge	\$\$\$	Japanese
Daily G	\$\$\$	American
Rock'n	\$\$	Seafood

Dining Info

- Make 11:00 AM Reservation
- Map Restaurant Location
- View Website
- Dial 310.640.1070
- Sort by...
- New Dining Search
- Refresh Screen
- Concur Home
- Travel Agency Info
- Hide

View the search results.

Use the menu on this page to:

- Make reservations
- Map the location (Concur Mobile will prepopulate the address in your device's mapping tool and map your route)
- Call the restaurant
- and more...

Hotel

Access via the itinerary menu...

- Flight Schedule
- Flight Status
- Online Check In
- Weather
- Add Taxi To
- Add Taxi From
- Add Dining
- Add Hotel**
- Add Rental Car
- Travel Agency Info
- Concur Home
- Hide

or the main menu

Welcome to Concur Mobile

- Manage Trips
- Manage Expenses & Reports
- Expense Approvals
- Travel Approvals
- Add Mobile Expense
- Search for Dining
- Search for Taxi
- Search for Hotel**
- Search for Rental Car

NOTE: An advantage of using the *itinerary* menu is that Concur Mobile prepopulates fields whenever possible.

On the **Search for Hotel** page...

Choose the desired search tab.
Then, enter or select the remaining search criteria.

Concur Search for Hotel

Airport | Location | Company Location

Search by Airport

Los Angeles Airport, United States
e.g. 'BOS' or 'Boston Airport'

Check In: Apr 1, 2009
Check Out: Apr 2, 2009

Find hotels within

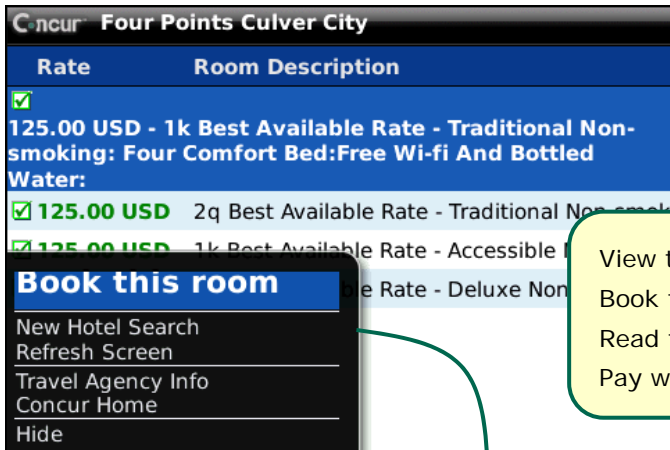
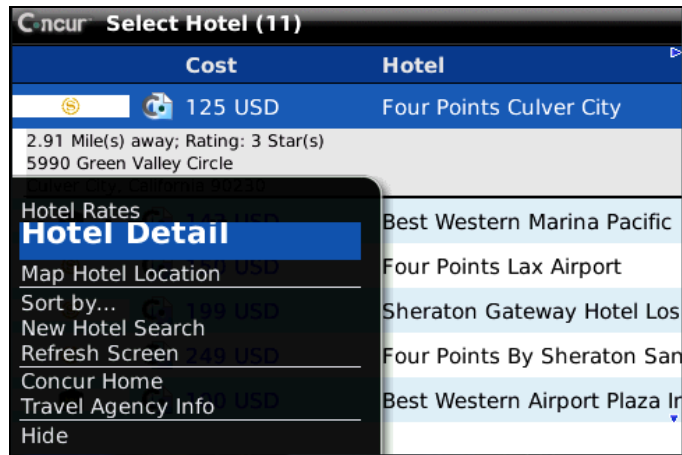
Number: 5
Scale: miles

Hotel Name:
Smoking: Non-smoking
Room Type: King
Guests: 1

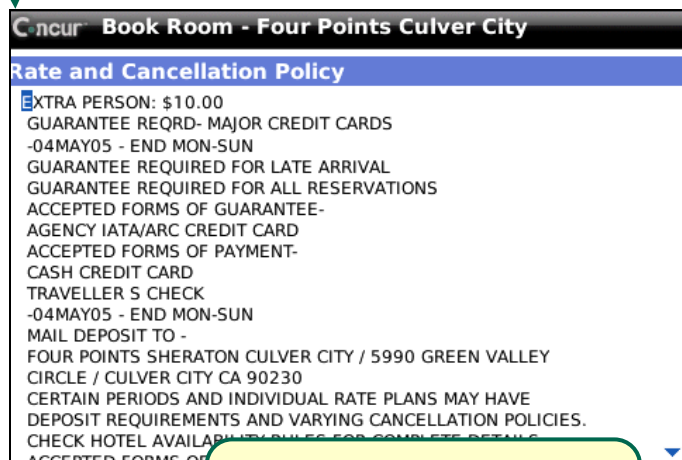
View the search results. Just like the online version, you can see which vendors are preferred, e-receipt enabled, and green/yellow/red in policy.

Use the menu on this page to:

- View hotel details
- Map the location (Concur Mobile will prepopulate the address in your device's mapping tool and map your route)
- Check hotel rates
- and more...



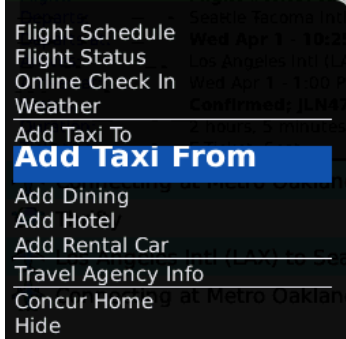
View the hotel details.
Book the room.
Read the cancellation policy.
Pay with your company card.



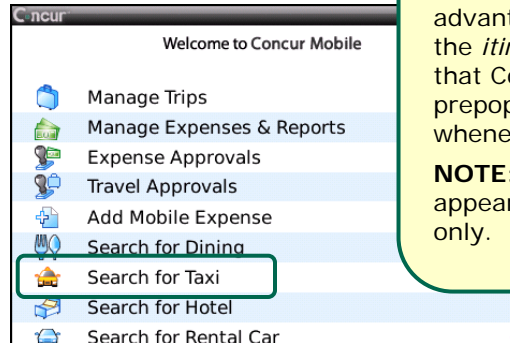
NOTE: Your company card number *never* appears on your mobile device.

Taxi

Access via the itinerary menu...



or the main menu



NOTE: An advantage of using the *itinerary* menu is that Concur Mobile prepopulates fields whenever possible.

NOTE: This link may appear for US clients only.

On the **Search for Taxi** page...

Enter the pick-up address (if one is not already provided).

On the search results page, the RideCharge taxis (if any) are listed first.

Use the menu to make the RideCharge reservation.

Confirm the ride.

In the car, at the end of the ride, enter the amount you want to pay for the taxi into Concur Mobile.

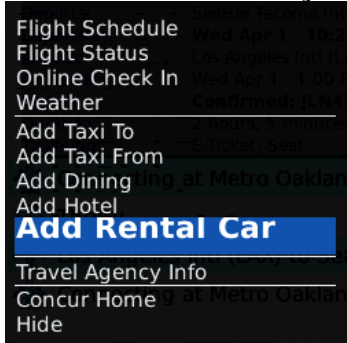
Payment is charged to your company card, your driver receives an instant message, and you receive an e-receipt online.



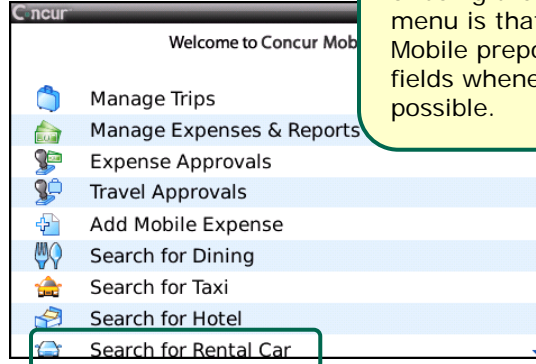
If RideCharge is not available in the area, select a taxi.
 Call the taxi company to make arrangements. You cannot pay through Concur Mobile or receive an e-receipt.

Rental Car

Access via the itinerary menu...



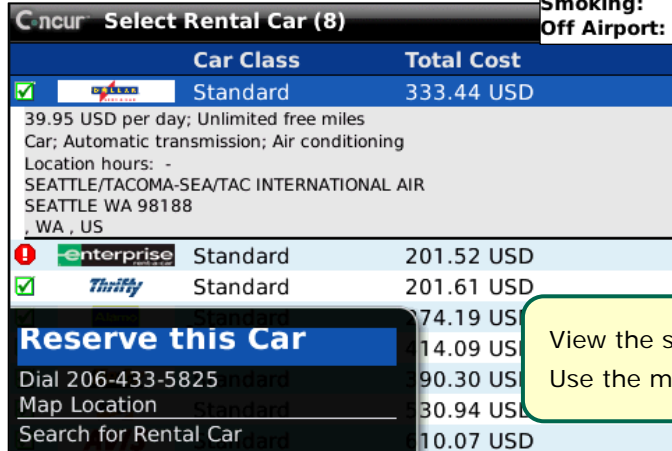
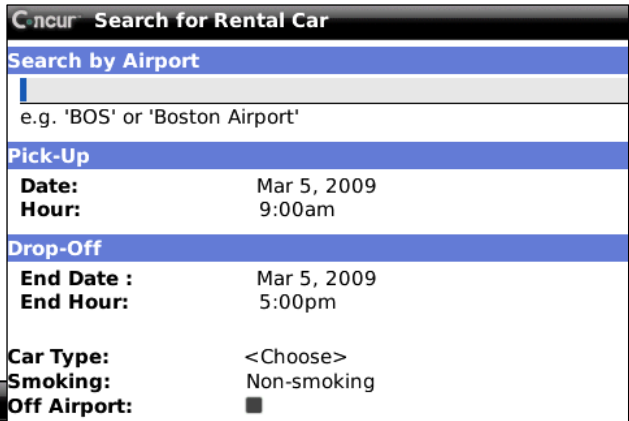
or the main menu



NOTE: An advantage of using the *itinerary* menu is that Concur Mobile prepopulates fields whenever possible.

On the **Search for Rental Car** page ...

Enter an airport (if one is not already provided).
 Then, enter or select the remaining search criteria.

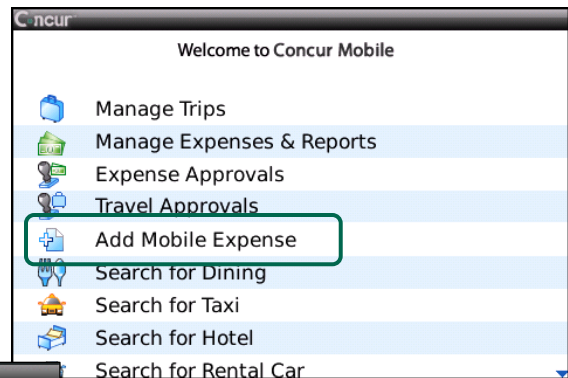


View the search results.
 Use the menu on this page to reserve the car.

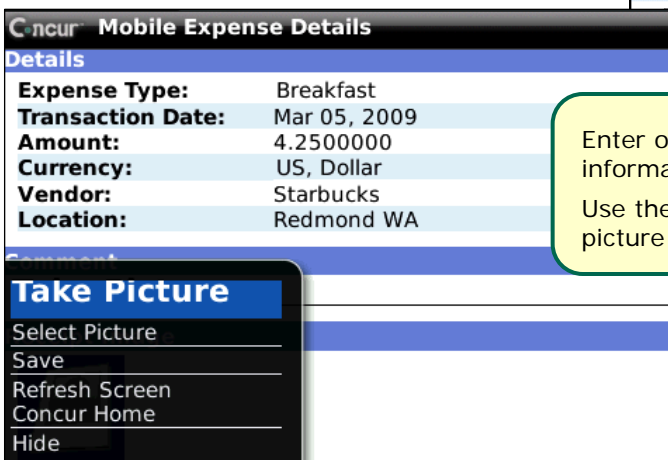
Add a Mobile Expense

You can use Concur Mobile to add basic out-of-pocket expense information and take a picture of your receipt. You can then use Concur Expense to upload both. Once uploaded, you can edit the expense to add any other required information. The receipt picture appears in Expense like any other uploaded scanned image.

You can add a Mobile expense using the main menu:



On the **Add Mobile Expense** page...

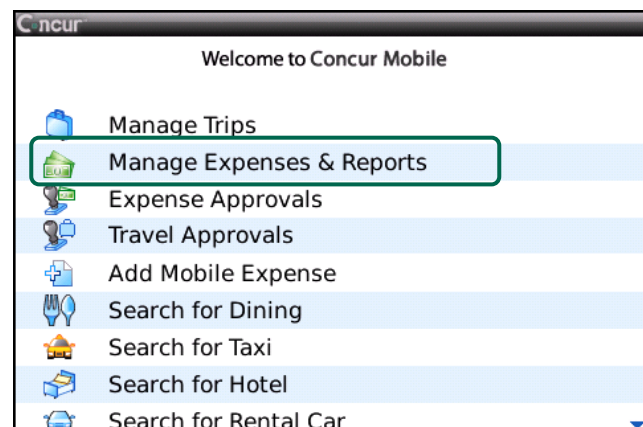


Enter or select the basic expense information.
Use the menu on this page to take a picture of the receipt.

Manage Expenses and Expense Reports

You can view, edit, and delete your Mobile expenses. You can check the status of your existing expense reports and view your expenses.

You can manage your Mobile expenses and expense reports using the main menu:



Manage your Mobile expenses

You can add, edit, view, and delete Mobile expenses.

Concur Manage Expenses & Reports (2)

Mobile Expenses Expense Reports

Date	Amount	Type
3/10/2009	9.00 USD	Breakfast
Vendor: Starbucks Location: Redmond WA		
3/10/2009	37.00 USD	Taxi

Edit/View Details

- Delete Mobile Expense
- Add Mobile Expense
- Refresh Screen
- Concur Home
- Hide

Use the **Mobile Expenses** tab.
Use the menu on this page to:

- Edit Mobile expenses
- Delete Mobile expenses
- and more...

View your expense reports

You can view your existing expense reports, expense details, and report status.

Concur Manage Expenses & Reports (8)

Mobile Expenses Expense Reports

Report Name	Status	Tot. Amt
Vendor Visits	Not Submitted	863.63 USD
Pmt Status: Not Paid Tot. Amt: 863.63 Currency: USD Purpose: Contracts		
Training	Not Submitted	1,752.06 USD
temp	Not Submitted	0.00 USD
Sales Class	Not Submitted	2,251.00 USD
LevDev	Not Submitted	658.00 USD
temp	Not Submitted	0.00 USD
GlobalTech	Not Submitted	3,434.00 USD
Crayton Book	Not Submitted	43.00 USD

Use the **Expense Reports** tab.

Use the menu on this page to:

- View the expense entries on the report
- View the report header information
- View receipt images
- Create additional Mobile expenses
- and more...

Concur Manage Expenses & Reports (8)

Mobile Expenses Expense Reports

Report Name	Status	Tot. Amt
Vendor Visits	Not Submitted	863.63 USD
Pmt Status: Not Paid Tot. Amt: 863.63 Currency: USD Purpose: Contracts		
Training	Not Submitted	1,752.06 USD
temp	Not Submitted	0.00 USD
Sales Class	Not Submitted	2,251.00 USD
LevDev	Not Submitted	658.00 USD
temp	Not Submitted	0.00 USD
GlobalTech	Not Submitted	3,434.00 USD
Crayton Book	Not Submitted	43.00 USD

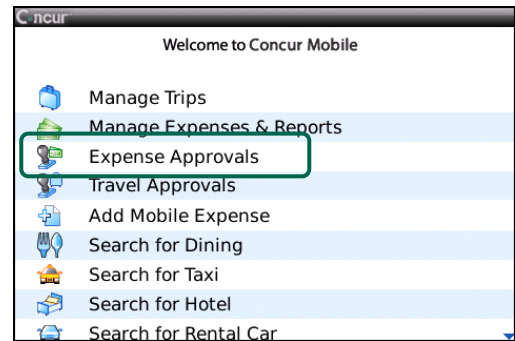
View Expense Entries

- View Report Header
- View Receipts
- Add Mobile Expense
- Refresh Screen
- Concur Home
- Hide

Review and Approve Expense Reports

If you are an expense report approver, you can use Concur Mobile to review a report along with its expense details, header details, and receipt images. You can either approve the entire report "as is" or reject the entire report. You cannot make changes to the report, for example, to partially approve amounts.

On the **Manage Expense Approvals** page...



Concur **Manage Expense Approvals (1)**

Report Name	Employee	Report Date	Tot. Amt
Vendor Visits	Never, William	2/11/2009	4,502.00

Purpose: Contracts

View Expense Entries

- View Report Header
- View Receipts
- Approve Expense Report
- Reject Expense Report
- Refresh Screen
- Concur Home
- Hide

Concur Mobile

Use the menu on this page to:

- View the expense details
- View the header information
- View the receipt images
- Approve the report
- Reject the report
- and more...

Review and Approve Trips

If you are a trip approver, you can manage your approvals using Concur Mobile. You can review the itinerary, approve the trip, or reject the trip.

On the **Manage Trip Approvals** page...



Concur **Manage Trip Approvals (5)**

Traveler	Trip
Vernon Bear	Trip from Minneapolis/St. Paul to Seattle
Vernon Bear	Trip from Minneapolis/St. Paul to Boston
Vernon Bear	Hotel Reservation
Vernon Bear	Car/Hotel Reservation
Vernon Bear	Trip from Washington to Atlanta - for C

View Itinerary

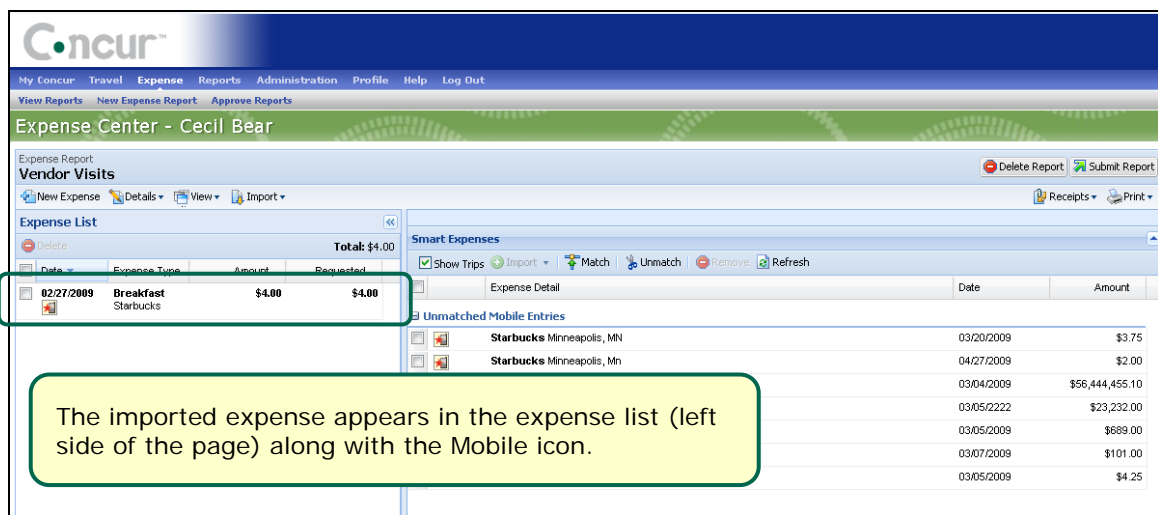
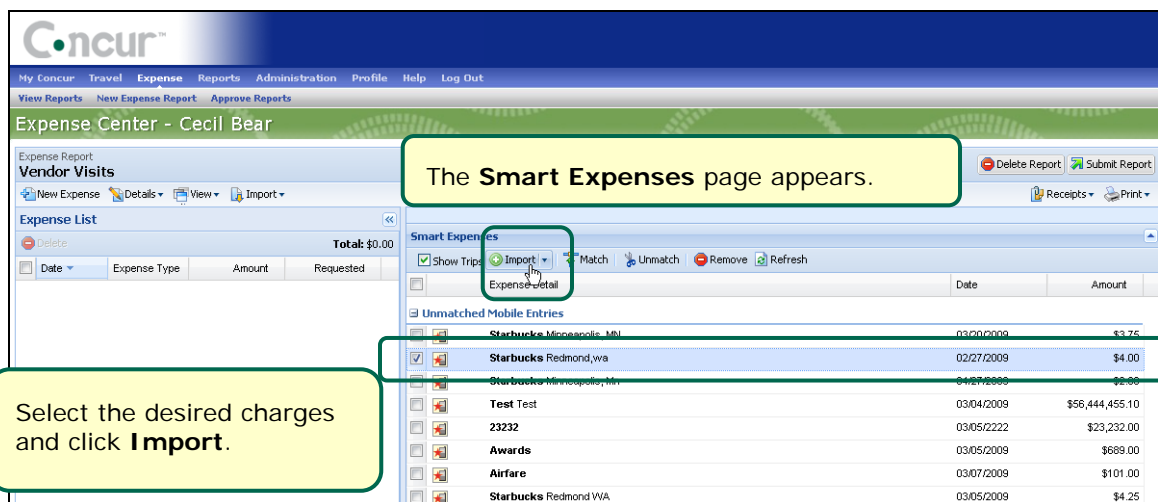
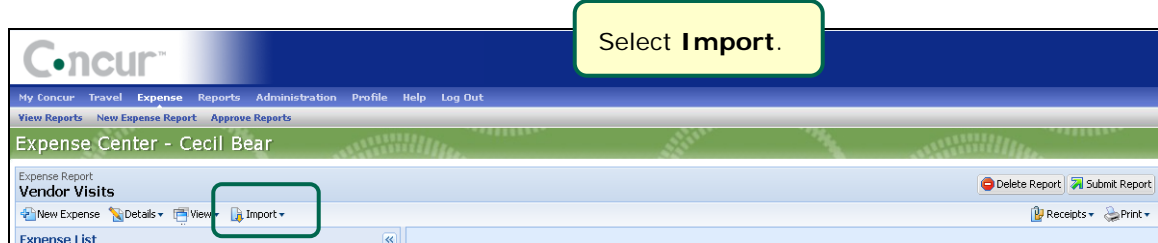
- Approve Trip
- Reject Trip
- Refresh Screen
- Concur Home
- Hide

Use the menu on this page to:

- View the itinerary
- Approve the trip
- Reject the trip
- and more...

Uploading Your Mobile Expenses into Concur Expense

Your Mobile expenses will generally upload to Expense automatically. You can also upload them manually. To upload your Mobile expenses, log on to Concur Expense and open the appropriate report.



NOTE: If you delete an expense from an expense report and that expense was generated in Concur Mobile, that expense is not deleted from the system – it moves back to the "pool" of Mobile expenses on your device.