Introduction to........

Concur's mobile app – BlackBerry®

Version 8.4 - May 11 2012

Applies to these Concur solutions:

- ☒ Expense
- ☒ Travel
- ☒ Travel & Expense
- ☒ Invoice

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 your receipt; create, edit, and submit your expense reports; and complete your expense approvals. You can check your itinerary; book a taxi, rental car, or hotel; and view the map.

Contents

About this Guide

This guide provides instructions for BlackBerry users to set up and get started with Concur's mobile app. There are many kinds of BlackBerry. Your device may look slightly different than the samples shown here.

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 web version of Concur.

NOTE: If your company uses Single Sign On (SSO), this page will be slightly different.

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.

NOTE: If your company uses Single Sign On (SSO), you may be directed to your company's mobile page where you log in with your regular company network credentials.

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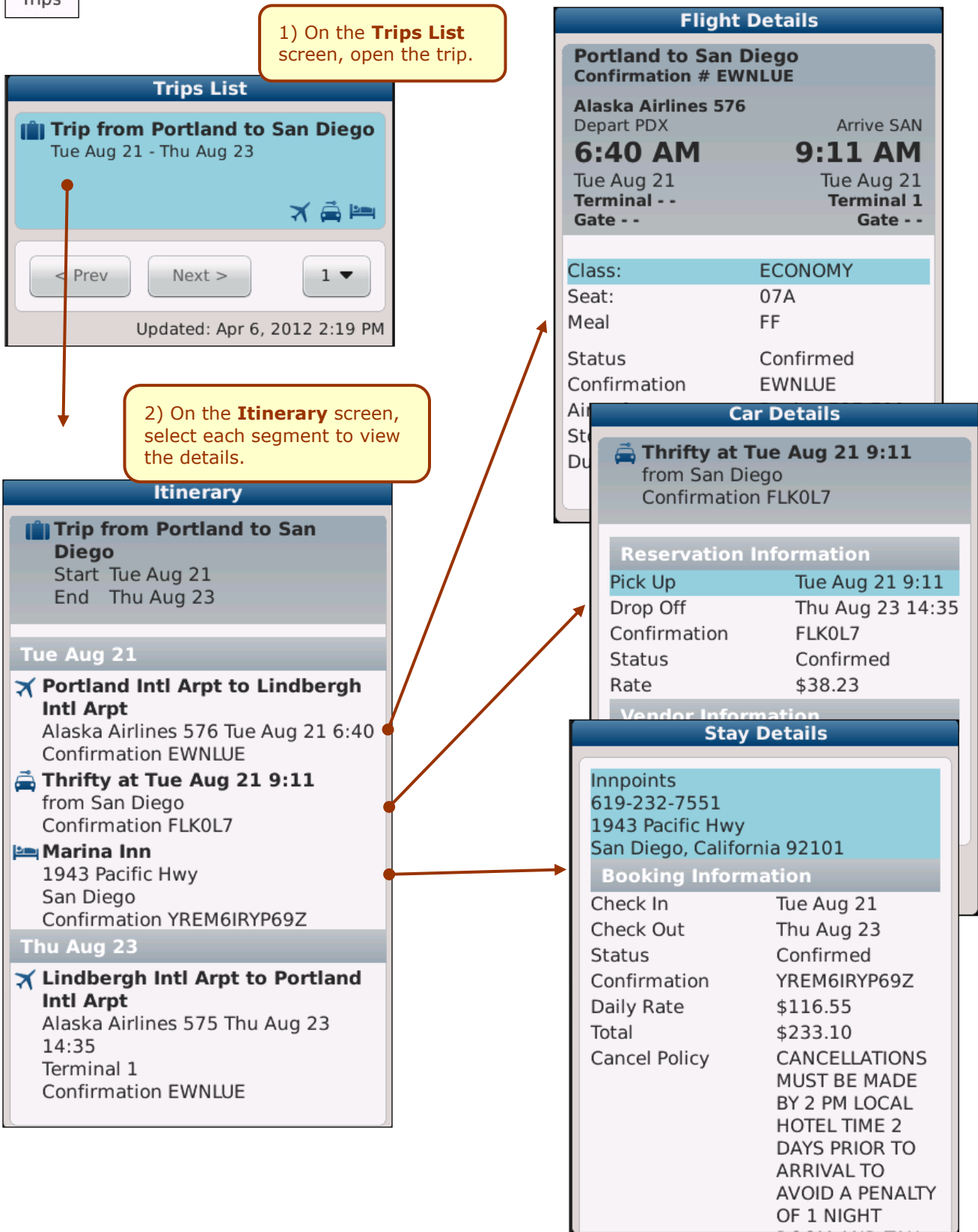
The sections that display – and the icons in each section – depend on your company's configuration and your permissions.
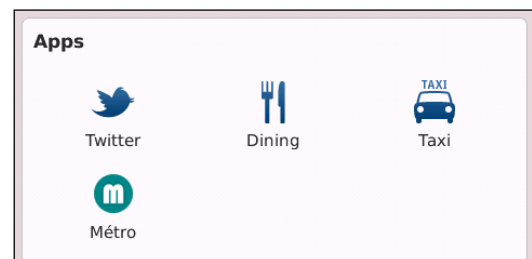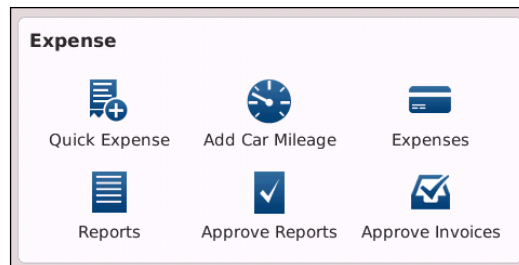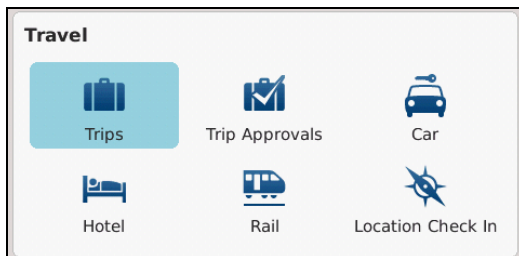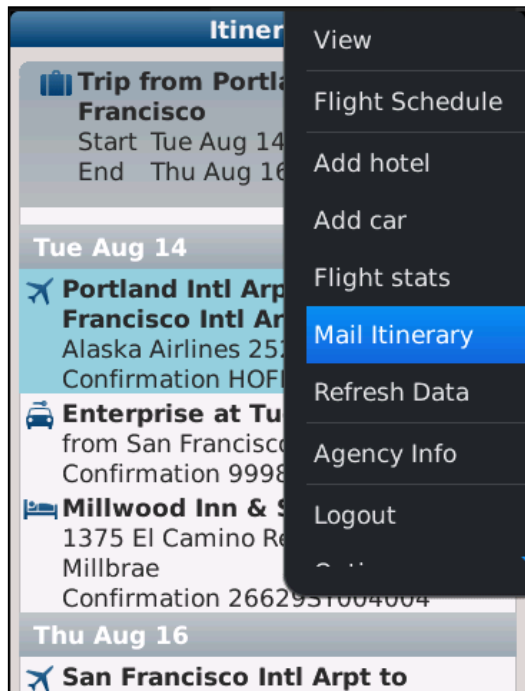
Trips

Trips

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

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

Trips List

Trip from Portland to San Diego
Tue Aug 21 - Thu Aug 23

< Prev   Next >   1 ▼

Updated: Apr 6, 2012 2:19 PM

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

Itinerary

Trip from Portland to San Diego
Start Tue Aug 21
End   Thu Aug 23

Tue Aug 21

✈ **Portland Intl Arpt to Lindbergh Intl Arpt**
Alaska Airlines 576 Tue Aug 21 6:40
Confirmation EWNLUE

🚗 **Thrifty at Tue Aug 21 9:11**
from San Diego
Confirmation FLK0L7

🛏 **Marina Inn**
1943 Pacific Hwy
San Diego
Confirmation YREM6IRYP69Z

Thu Aug 23

✈ **Lindbergh Intl Arpt to Portland Intl Arpt**
Alaska Airlines 575 Thu Aug 23 14:35
Terminal 1
Confirmation EWNLUE

Flight Details

Portland to San Diego
Confirmation # EWNLUE

Alaska Airlines 576
Depart PDX   Arrive SAN
6:40 AM   **9:11 AM**
Tue Aug 21   Tue Aug 21
Terminal - -   Terminal 1
Gate - -   Gate - -

Class: ECONOMY
Seat: 07A
Meal   FF

Status   Confirmed
Confirmation   EWNLUE
Air
St
Du

Car Details

🚗 **Thrifty at Tue Aug 21 9:11**
from San Diego
Confirmation FLK0L7

Reservation Information
Pick Up   Tue Aug 21 9:11
Drop Off   Thu Aug 23 14:35
Confirmation   FLK0L7
Status   Confirmed
Rate $38.23
Vendor Information

Stay Details

Innpoints
619-232-7551
1943 Pacific Hwy
San Diego, California 92101
Booking Information
Check In   Tue Aug 21
Check Out   Thu Aug 23
Status   Confirmed
Confirmation   YREM6IRYP69Z
Daily Rate $116.55
Total $233.10
Cancel Policy   CANCELLATIONS
                   MUST BE MADE
                   BY 2 PM LOCAL
                   HOTEL TIME 2
                   DAYS PRIOR TO
                   ARRIVAL TO
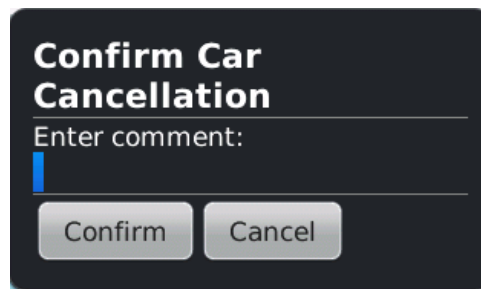   AVOID A PENALTY
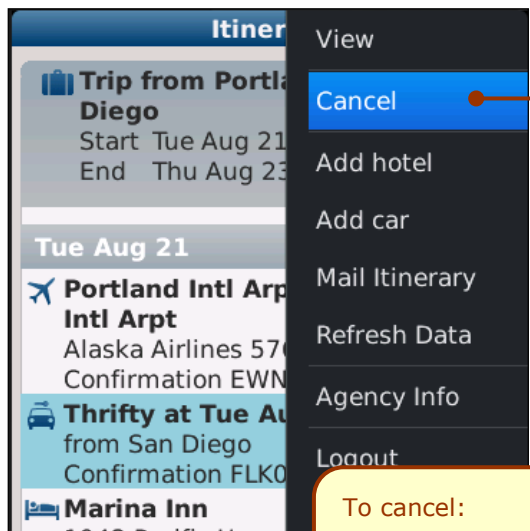   OF 1 NIGHT

Other Itinerary Options

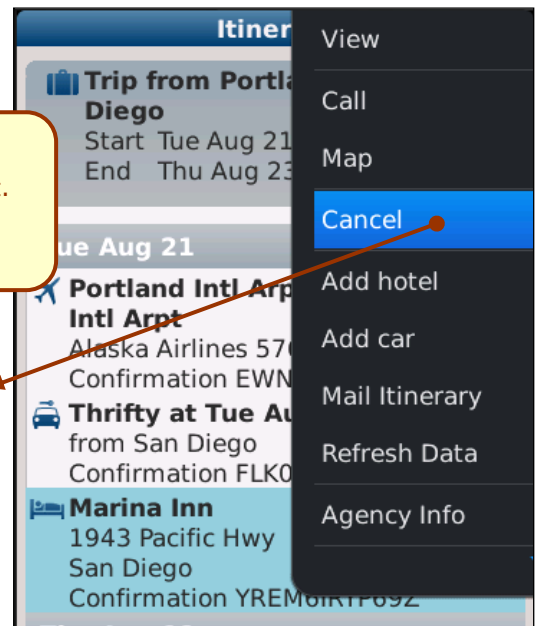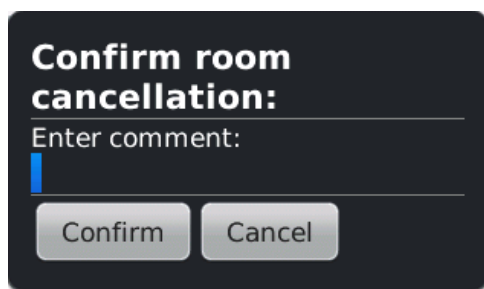Access the menu on this page to:
- see alternative flights for the same airline and the same day (**Flight Schedule**)
- add a car or hotel to the current trip
- check the flight stats
- refresh the itinerary data
- email your itinerary
- and more....

Cancel Car and Hotel

To cancel:
1) Select the car or hotel segment.
2) Access the menu.
3) Select **Cancel**.

Book a 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. Also, depending on your company's configuration, you may not be able to book a car unless you add it to an existing itinerary.

Rental Car Search

Location
- Airports
- Offices

Will Rogers World Arpt, Oklahoma City, OK (OKC)

Pick Up
Tue, Aug 07, 2012 09 AM

Drop Off
Thu, Aug 09, 2012 05 PM

Car Type
Any ▾

Search

> 1) Enter/Verify the search criteria.
> 2) Select **Search**.

Select Vendor

Thrifty
NOT Preferred
2 Cars from $37.36

Dollar
NOT Preferred
12 Cars from $39.33

Advantage
NOT Preferred
6 Cars from $46.25

Hertz
$7.49

$8.00

Next >   1 ▾

> 3) Select the vendor.

Ghost cards available:
Ghost cards are special credit cards used by some companies. If a ghost card is available to you, it will appear in the credit card list.

Advantage

$46.25
Economy Car
Automatic transmission

$46.25
Compact Car
Automatic transmission

$48.25
Standard Car
Automatic transmission

$50.25
Intermediate Car
Automatic transmission

$54.25
Full-size Car
Automatic transmission

$78.25
Premium Car
Automatic transmission

> 4) Select the car.

Reserve Car

Advantage

$48.25
Standard Car
Automatic transmission

Credit Card
Demo Visa ***********1111 ▾

Reserve Car

> 5) Select **Reserve Car**.

Book a 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. Also, depending on your company's configuration, you may not be able to book a hotel unless you add it to an existing itinerary.

Hotel Search

Location

☐ only office locations

Will Rogers World Airport (OKC), 7100 Terminal Dr #937, Oklahoma City, OK 73159, USA

Hotel Name or Brand

Search Within

5   ▼   miles   ▼

Check In
Tue, Aug 07, 2012

Check Out
Thu, Aug 09, 201

Search

1) Enter/Verify the search criteria.
2) Select **Search**.

3) Highlight a hotel and access the menu.

Select
Oklahoma City, OK 73
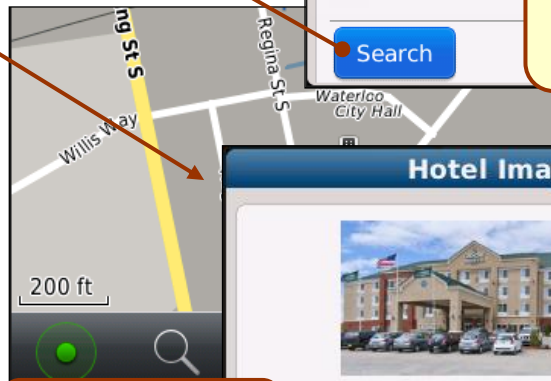
Country Inn & Suite
★★☆☆☆
Rooms from $87.00
2401 S Meridian Ave
Oklahoma City, OK 73

Wingate by Wyndh
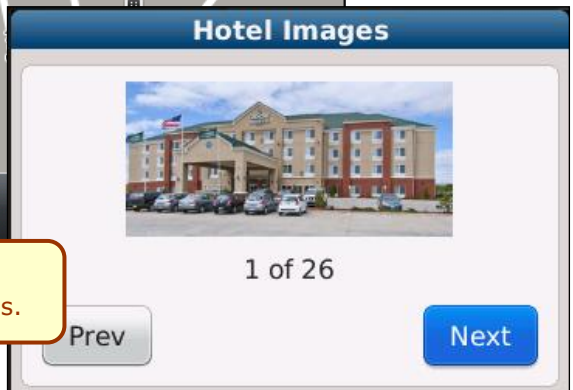★★★☆☆
Rooms from $71.20
2001 S Meridian
Oklahoma City, OK 73

Cambria Suites
★★★☆☆
Rooms from $129.00
4410 SW 19th Street
Oklahoma City, OK 73

Call
Map
Map all
Hotel Images
Logout
Options
About
Switch Applicatio
Exit Application
DEBUG

< Prev   Next >   1 ▼

5) Press Enter to open the hotel.

200 ft

4) Review the map and images.

Hotel Images

1 of 26

Prev   Next

Country Inn & Suites By Carlson ...

$87.00
2q-nsk-guest Room-accessible-hi Spd Net-fridge

$92.00
1k-nsk-guest Room-hi Spd Net-fridge-microwave

$92.00
1k-nsk-guest Room-accessible-hi Spd Net-fridge

$99.00
1k-nsk-studio Suite-hi Spd Net-fridge-microwave

$102.00
1k-nsk-1 Bedroom Suite-accessible-hi Speed Net

< Prev   Next >

6) Select the room.

Reserve Room

Country Inn & Suites B... 3.17 mi
★★☆☆☆
2401 S Meridian Ave
Oklahoma City, OK 73108
405-605-8300

$102.00
1k-nsk-1 Bedroom Suite-accessible-hi Speed Net

Credit Card

Demo Visa ************1111 ▼

Reserve

7) Select **Reserve**.

Ghost cards available:
Ghost cards are special credit cards used by some companies. If a ghost card is available to you, it will appear in the credit card list.

Book Rail

Rail — Select the **Rail** icon on the home screen to search for and book Amtrak - if your company is configured to use Amtrak Direct Connect.

Amtrak

◉ Round Trip
○ One Way

Departure Station
Chicago - Union Station, IL

Arrival Station
Milwaukee Airport, WI

Departure Date
Tue, Sep 04, 2012 09 AM

Return Date
Thu, Sep 06, 2012 05 PM

[Search]

1) Select the departure and arrival stations and times.
2) Select **Search**.

Select Train

Departs 8:25 AM, Sep 4
Arrives 9:39 AM, Sep 4
MKA > CHI
Departs 5:55 PM, Sep 6
Arrives 7:14 PM, Sep 6

CHI > MKA
Departs 8:25 AM, Sep 4
Arrives 9:39 AM, Sep 4
MKA > CHI
Departs 7:45 PM, Sep 6
Arrives 9:04 PM, Sep 6

CHI > MKA
Departs 10:20 AM, Sep 4
Arrives 11:34 AM, Sep 4
MKA > CHI
Departs 5:55 PM, Sep 6
Arrives 7:14 PM, Sep 6

CHI > MKA
Departs 10:20 AM, Sep 4
Arrives 11:34 AM, Sep 4
MKA > CHI
Departs 7:45 PM, Sep 6
Arrives 9:04 PM, Sep 6

3) Select the train.

Ghost cards available:
Ghost cards are special credit cards used by some companies. If a ghost card is available to you, it will appear in the credit card list.

Reserve Train

$46.00
333 CHI > MKA, Coach Unreserved Sea

Departs 10:20 AM, Sep 4
Arrives 11:34 AM, Sep 4

Duration 1:14

Return trip
340 MKA > CHI, Coach Unreserved Sea

Departs 5:55 PM, Sep 6
Arrives 7:14 PM, Sep 6

Duration 1:19

Credit Card

Demo Visa ***********1111 ▾

Quik-Trak Machine ▾

Delivery Fee: $0.00

[Reserve Train]

Select Seat

$46.00
CHI > MKA, Coach Unreserved Seat
MKA > CHI, Coach Unreserved Seat

[< Prev] [Next >]   1 ▾

4) Select the seat.

5) Select **Reserve Train**.

Access 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.
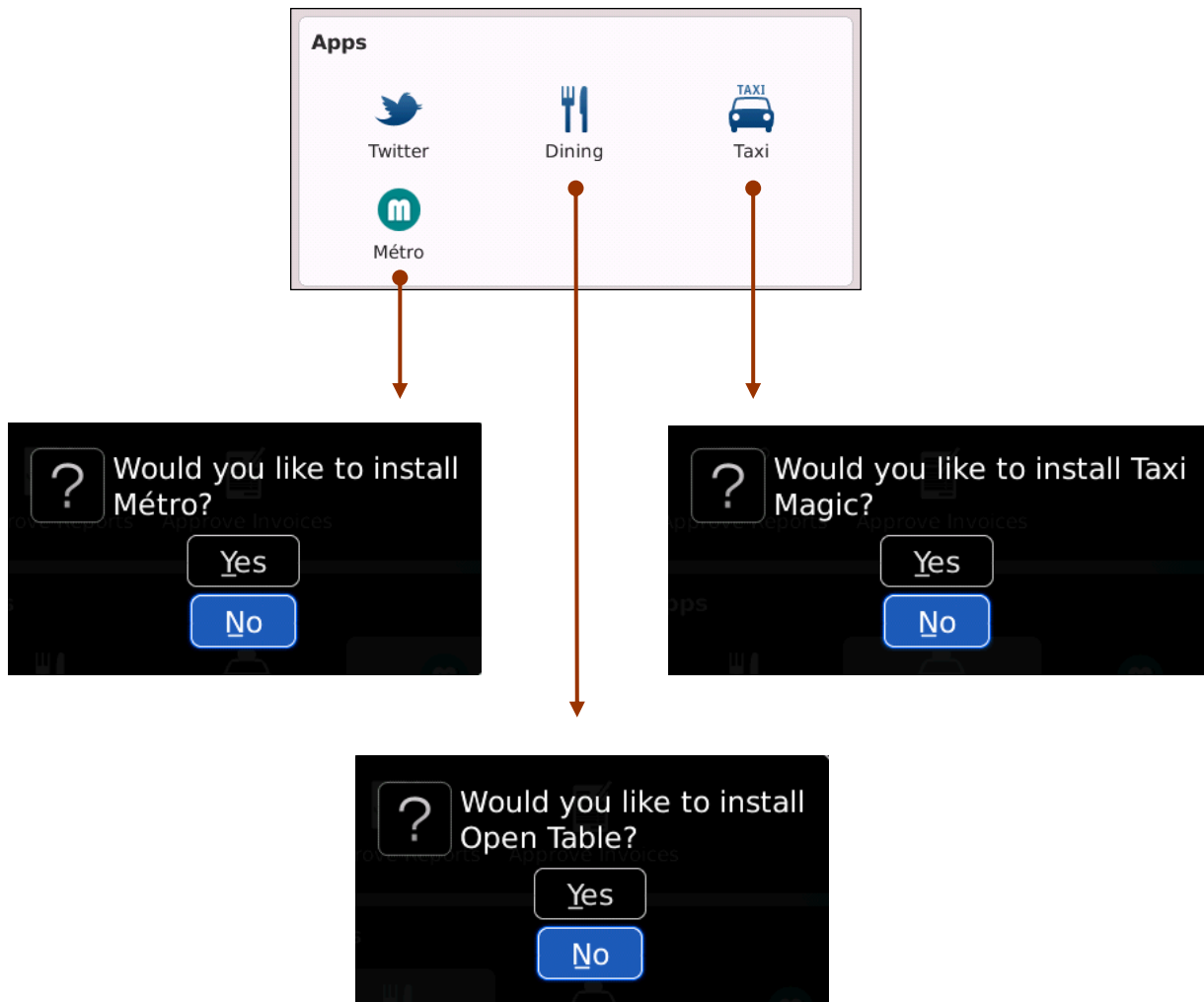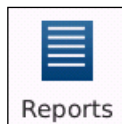
Expenses and Expense Reports

List of Expenses (the Expenses screen)

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

Expenses	
☐ **Room Rate** Fairfield Inns 9/30/2011 Corporate Card	$814.40
☐ **Breakfast** Cafe Bistro, Seattle, Washington 9/26/2011	$18.21
☐ **Airfare** Alaska Airlines 9/3/2011 Corporate Card	$343.40

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 web version of Concur, if your company allows you to delete card transactions.

- Attach expenses - both Quick Expenses and card transactions - to a new or existing expense report.

List of Reports (the Active Reports screen)

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

Active Reports	
Seminar in San Diego Not Submitted 8/25/2011	$466.02
Mileage August 2011 Not Submitted 8/25/2011	$75.74
Client Dinner Not Submitted 8/2/2011	$153.33
Trip to LenDev Client Site Not Submitted 7/1/2011	$4,521.01

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

Create a Quick Expense
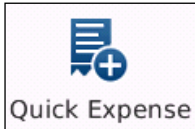
Quick Expense

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.
> 2) Select the expense type.

Quick Expense

Transaction Date
Mon, Jun 20, 2011

Expense Type
Breakfast

Amount
18.21

Currency
USD, US, Dollar ▼

Vendor
Cafe Bistro

Location
Seattle, Washington

Comments

Take Photo
Import Image

Save Expense   Cancel

> 5) Select **Save Expense**.

Quick expense   EN

Search |

Commonly Used
Breakfast
Bus
Dinner
Gas
Lunch
Miscellaneous
Parking ▼

Vendor

> 3) Enter the remaining information.

> 4) Take a photo of the receipt.

Café Bistro
100 West 5th Ave
Seattle WA 98025

206.555.1212

June 20 2011

Bacon and Eggs 11.00
Coffee................................. 3.00
Tax 1.21
Tip 3.00
Total.................................... 18.21

> **NOTE:** 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.
> 3) Select **Add To Report**.

Expenses

	Add Quick Expense
11/29/2011 Corporate Card	**Add To Report**
☐ **Dinner** Cafe Monte 11/29/2011 Corporate Card	Delete Selected
	Refresh Data
☐ **Airfare** Alaska Airlines 11/29/2011 Corporate Card	Logout
	Options
	About
☑ **Breakfast** Cafe Bistro, Seattle, 6/20/2011	Switch Application
	Exit Application

Expenses EN

Add to new report:
Report on 9/3/2011 [save]
9/30/2011

Add to existing report:

Seminar in San Diego	$466.02
Mileage August 2011	$75.74
Client Dinner	$153.33
Trip to LenDev Client...	$4,521.01

> 4) 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.

Expenses

	Add Quick Expense
11/29/2011 Corporate Card	Add To Report
☐ **Dinner** Cafe Monte 11/29/2011 Corporate Card	**Delete Selected**
	Refresh Data
☐ **Airfare** Alaska Airlines 11/29/2011 Corporate Card	Logout
	Options
	About
☑ **Breakfast** Cafe Bistro, Seattle, 6/20/2011	Switch Application
	Exit Application

< Prev	Next >	4 ▼

Updated: Apr 6, 2012 3:50 PM

NOTE: To delete a *card* transaction, use the web version of Concur, if your company allows you to delete card transactions.
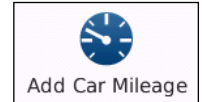
> 1) On the **Expenses** screen, select the check box for the desired expense -- you can use Enter or the spacebar.
> 2) Access the menu.
> 3) Select **Delete Selected**.

Add a Car Mileage/Kilometer Expense
FIXED RATE

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

Add Car Mileage (icon)

Add Car Mileage EN

Add to new report:
Report on 9/3/2011

Add to existing report:

Seminar in San Diego	$466.02
Mileage August 2011	$75.74
Client Dinner	$153.33
Trip to LenDev Client...	$4,521.01

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.

Add Car Mileage

Expense Type *
Personal Car Mileage

Transaction Date *
Apr 6, 2012

2) Search for and select the location.

City *
Seattle, Washington

Purpose of the Trip *
Vendor visit

From Location *
Seattle - home office

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

To Location *
Tacoma - LenDev office

Add Car Mileage

Search City
seatt

Seattle, Washington
Seattle Tacoma Intl Arpt, Washington
Seattle Tacoma Intl Arpt,WA,United States...
Seattle-Kenmore, Washington

Currency *
US, Dollar

Payment Type *
Cash

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.)

Amount *
34.43

Distance (MILE) *
85

4) Enter the number of miles.
Concur calculates the amount based on the number of miles and the rate.
5) Select **Save**.

Salesforce Opportunity

Save   Cancel

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.

Vehicle ID *
DE51 RED

Number of Passengers

Distance to Date
0

Open an Expense Report

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

Report Details

On-site Client Training $1,230.26
Not Submitted
3/30/2012

Check Receipts

Add New Expense

Room Rate $620.00
Executive Inns & Suites
3/22/2012

Breakfast $12.63

3/21/2012

Active Reports

On-site Client Training $1,230.26
Not Submitted
3/30/2012

Client $550.00
Approved & In Accounting Review
3/29/2012

Client Training $550.00
Approved & In Accounting Review
3/29/2012

> To open, tap the report or select the desired report and Enter.

Add an Expense to an Open Report

Expense Detail

Expense Type *
Dinner

Transaction Date *
Apr 9, 2012

Business Purpose

Enter Vendor Name

City

Currency *
US, Dollar

Payment Type *
Cash

Amount *
0.00

Comment

Personal Expense (do not reimburse) *
○ Yes
● No

Save   Cancel

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

Report Details

On-site Client Training $1,121.83
Not Submitted
3/30/2012

Check Receipts

Add New Expense

Room Rate $620.00
Executive Inns & Suites
3/22/2012

Report Details EN

Search |

Commonly Used
Breakfast
Bus
Dinner
Gas
Lunch
Miscellaneous
Parking

Airfare $367.40

> 2) Select the expense type.

> 3) Complete the remaining fields.
> 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

Report Details

On-site Client Training $1,121.83
Not Submitted
3/30/2012

Check Receipts

Add New Expense

Room Rate $620.00
Executive Inns & Suites
3/22/2012

Breakfast

Expense Detail

Room Rate $620.00
Executive Inns & Suites
3/22/2012

Attach Expense Receipt

Itemizations

Exceptions

Itemizations are required for this entry.

Details

1) With the report open, open the desired expense.
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

Report D...

On-site Client Trai...
Not Submitted
3/30/2012

Check Receipts

Add New Expense

Room Rate
Executive Inns & Suite...
3/22/2012

Breakfast

3/21/2012

Submit
Report Summary
Expense Details
Add New Expense
Attach Receipt
Remove Expense
Logout
Options
About

Comment

Expense Report

Report Total
$1,121.83

Less Personal Amount
$0.00

Amount Claimed
$1,121.83

Amount Rejected
$0.00

Company Disburseme...

Amount Due IBCP
$489.20

Amount Due Employee
$632.63

Total Paid by Company
$1,121.83

Employee Disburseme...

Amount Owed Compan...
$0.00

Total Owed by Employe...
$0.00

Report Summary

On-site Client Training $1,121.83
Not Submitted
3/30/2012

Attach Report Receipt

Check Receipts

Exceptions

Report has entry level exceptions

Header

Report Name *
On-site Client Training

Report Id *
DB934FD7EBA547D0B155

Policy *
US Expense Policy

Report Date
Mar 30, 2012

Business Purpose *
training classes

Report Currency *
US, Dollar

Approval Status *
Not Submitted

Department *
Client Training

Save   Cancel

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

Itemize an Expense on an Expense Report

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

Report Details

On-site Client Training $1,121.83
Not Submitted
3/30/2012   ⚠

Check Receipts

Add New Expense

Room Rate $620.00
Executive Inns & Suites
3/22/2012   ⚠

Breakfast $12.63

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

Expense Detail

Room Rate $620.00
Executive Inns & Suites
3/22/2012   ⚠

Attach Expense Receipt

Itemizations

Exceptions

Itemizations are required for this entry.

Details

Expense Type *
Room Rate

> 2) Select **Itemizations**.

Hotel Itemization

Check In
Sun, Mar 18, 2012

Check Out
Thu, Mar 22, 2012

Room Rate
131.00

Room Tax
21.00

Additional Charge
[select type]
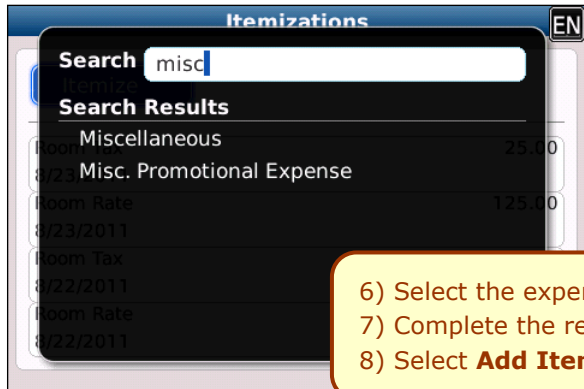
Amount
0.00

Additional Charge
[select type]

Amount
0.00

Itemize Hotel   Cancel

> 3) Enter the daily room rate, the daily tax rate, and any other daily charges (like parking).
> 4) Select **Itemize Hotel**.

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

Itemize

Itemized: 608.00
Remaining: 12.00

Room Tax $21.00
3/21/2012

Room Rate $131.00
3/21/2012

Room Tax $21.00
3/20/2012

Room Rate $131.00
3/20/2012

Room Tax $21.00
3/19/2012

Room Rate $131.00
3/19/2012

Itemization

Expense Type *

Miscellaneous

Transaction Date *

Mar 22, 2012

Business Purpose

City

Dallas, Texas

Currency *

US, Dollar

Payment Type *

Cash

Amount *

12.00

Comment

Personal Expense (do not reimburse) *

○ Yes

◉ No

Add Itemization   Cancel

Itemizations

Search misc

Search Results

Miscellaneous   25.00
Misc. Promotional Expense

Room Rate   125.00
8/23/2011

Room Tax
8/22/2011

Room Rate
8/22/2011

6) Select the expense type.
7) Complete the remaining fields.
8) Select **Add Itemization**.

NOTE: When done, the itemization 📋 icon appears and the exception ⚠ icon is gone.

Report Details

On-site Client Training $1,121.83
Not Submitted
3/30/2012

Check Receipts

Add New Expense

Room Rate   **$620.00**
Executive Inns & Suites
3/22/2012

Breakfast   **$12.63**

NOTE: To remove an itemization, select the itemization, access the menu, and select **Remove Itemization**.

Itemiz...

Itemize

Itemized: 620.00
Remaining: 0.00

Miscellaneous
3/22/2012

Room Tax
3/21/2012

Room Rate

Remove Itemizatio

Logout

Options

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DEBUG

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 web version of Concur, only certain expense types require attendees.) You can:

- Search and select from your Favorite Attendees list (attendees or attendee groups).
- Search and select from your company's list of attendees.
- Select from the device's Address Book.
- Enter attendee information manually.

NOTE: The mobile app currently does not support all of the configurable options, like editing the count of attendees. For these activities, use the web version of Concur.

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

2) Select **Attendees**.

3) Select **Search Favorites**, **Search Attendees**, **From Address Book**, or **Create New Attendee**.
These processes are described on the following pages.

ADD ATTENDEE - SEARCH FAVORITES

You can search for an attendee or attendee group in your Favorite Attendees list.

Attendees

Search Favorites

Search Attendees

From Address Book

Create New Attendee

Edit Amounts

Brown, Terry $221.69

1) Select **Search Favorites**.

Attendees

Search Favorites

cr

Cragen, Cynthia : TW Global

Cramer, David : TW Global

2) Type the first few letters of the attendee's last name and select 🔍.
3) Select the correct attendee or attendee group.

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

Brown, Terry $110.85

Cragen, Cynthia $110.84
TW Global

ADD ATTENDEE - ADDRESS BOOK

You can search for an attendee in your device contact list (Address Book).

Attendees

Search Favorites

Search Attendees

From Address Book

Create New Attendee

Edit Amounts

Brown, Terry $110.85

Cra
TW

1) Select **From Address Book**.

Attendees

Search Attendees

a

David Ashmore

Jessyca Andersson

Trace Alexander

2) Type the first few letters of the attendee's last name and select 🔍.
3) Select the correct attendee.

Attendee

Attendee Type

Business Guest ▼

Last Name *

Ashmore

First Name

David

Attendee Title

Company

TW Global

4) Select the appropriate attendee type.
5) Complete the remaining attendee fields.
6) Select **Add Attendee**.

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

Brown, Terry $73.90

Cragen, Cynthia $73.90
TW Global

Ashmore, David $73.89
TW Global

ADD ATTENDEE - SEARCH ATTENDEES

You can search for an attendee in your company's list of attendees.

Attendees

Search Favorites

Search Attendees

From Address Book

Create New Attendee

Edit Amounts

Brown, Terry	$73.90
Cragen, Cynthia TW Global	$73.90
Ashmore, David TW Global	$73.89

1) Select **Search Attendees**.

Search Attendees

Business Guest ▼

Last Name

andre

First Name

Attend

Compa

Search

2) Select the attendee type.
3) Enter the search criteria.
4) Select **Search**.

Atten

☑**Andressen, Harold**
   CEO
   LenDev

< Prev   Next

Add Attendees

View Details

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Exit Application

DEBUG

Full Menu

5) Select the desired attendee in the search results.
6) Access the menu.
7) Select **Add Attendees**.

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

Brown, Terry	$55.43
Cragen, Cynthia TW Global	$55.42
Ashmore, David TW Global	$55.42
Andressen, Harold	$55.42

ADD ATTENDEE - CREATE NEW ATTENDEE

Attendees

Search Attendees

From Addressbook

Create New Attendee

Cynthia Cragen TW Global	$57.90
Terry Brown	$57.90
David Ashmore TW Global	$57.89

1) Select **Create New Attendee**.

Attendee

Attendee Type
Business Guest ▼

Last Name *
Hale

First Name
Sandy

Attendee Title
VP, Sales

Company
TW Global

Add Attendee   Cancel

2) Select the attendee type.
3) Complete the remaining fields.
4) Select **Add Attendee**.

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

Cynthia Cragen TW Global	$43.43
Terry Brown	$43.42
David Ashmore TW Global	$43.42
Sandy Hale TW Global	$43.42

OTHER ATTENDEE OPTIONS

Atten...

Search Attende...   Remove Attendee

From Addressbo...   Logout

Create New Atten...   Options

Edit Amounts   About

Switch Applicatio...

Cynthia Cragen   Exit Application
TW Global
Terry Brown   DEBUG

Full Menu

To remove an attendee:
1) Select the attendee.
2) Access the menu.
3) Select **Remove Attendee**.

Edit Attendee Amounts

Brown, Terry
55.43

Cragen, Cynthia
55.42

Ashmore, David

Attendees

Search Favorites

Search Attendees

From Address Book

Create New Attendee

Edit Amounts

To edit attendee amounts (if allowed):
1) **Select Edit Amounts**.
2) Make the desired changes.
3) Select **Done**.

Attach Receipts

You can attach receipts to an expense report (submitted and approved) or to individual expense entries.

To add a receipt to a *report*:
1) Open the desired report.
2) Access the menu.
3) 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

You can submit a report from an open report or an open expense entry.

To submit:
1) Open the report or expense entry.
2) Access the menu.
3) 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, open the desired trip.
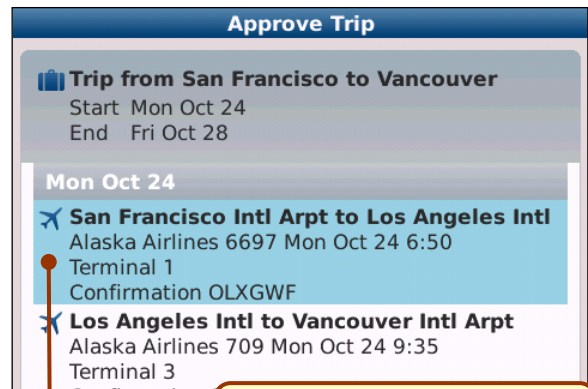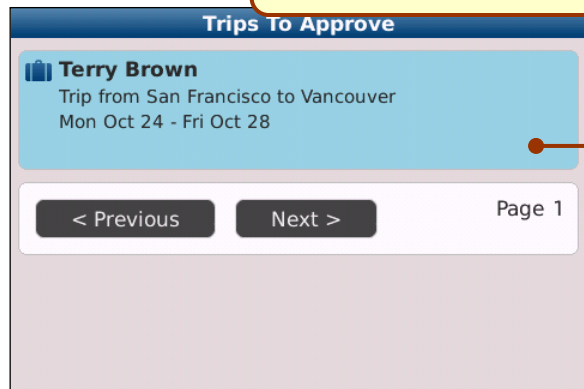
2) Open each segment to review the details.
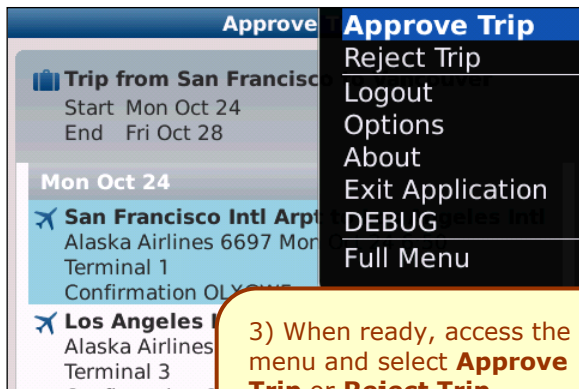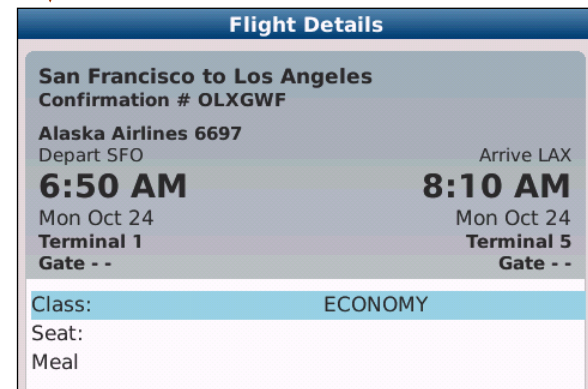
3) When ready, access the menu and select **Approve Trip** or **Reject Trip**.
NOTE: If you reject a trip, you must enter a comment for the user.

Expense Reports
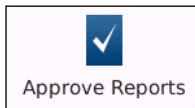
Approve Reports

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

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

Approve Reports

Brown, Terry L	**$523.15**
Sales Training	
8/25/2011	

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Report Details

Brown, Terry L	**$523.15**
Sales Training	

View All Receipts

Business Meal (attendees)	**$240.24**
7/28/2011	
Airfare	**$282.91**
Delta Air Lines	
7/28	

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

GetReceiptsAsImage.ashx?ic=n... 4 3g

> 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.

Report

Brown, Terry L	
Sales Training	

View All Receipts

Business Meal (attende	
7/28/2011	
Airfare	
Delta Air Lines	
7/28/2011	

Approve
Send Back
Report Summary
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Payment Requests (Invoice)
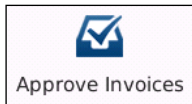
Select the **Approve Invoices** icon to view, approve, and/or send back payment requests.
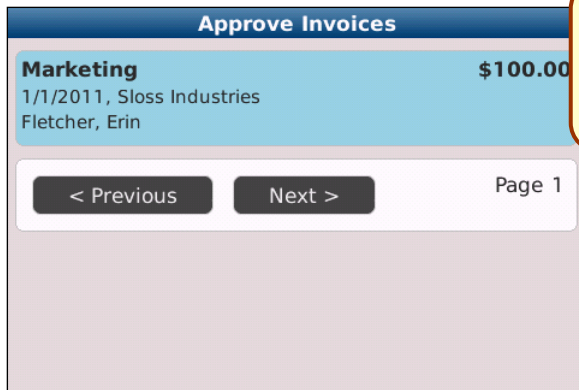
1) On the **Approve Invoices** screen, open the request.
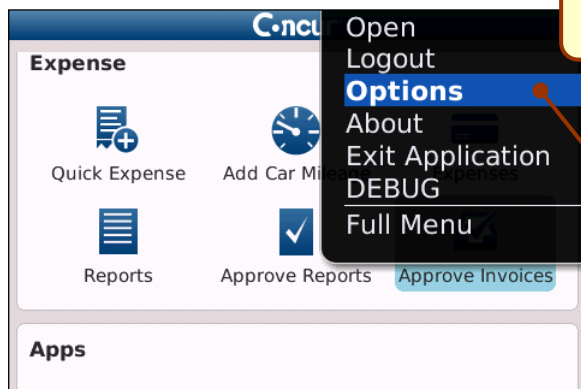
2) Review the header, vendor, and line item information.
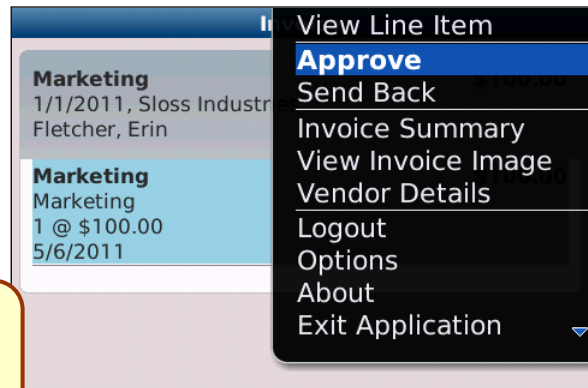
3) When ready, access the menu and select either **Approve** or **Send Back**.

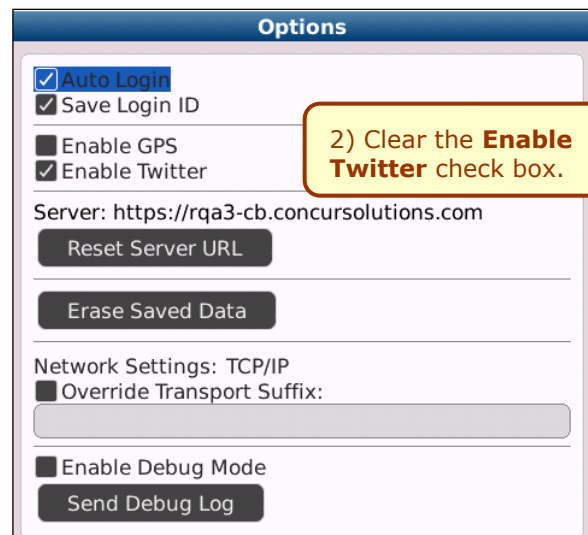**NOTE:** If you send back a request, you must enter a comment for the user.

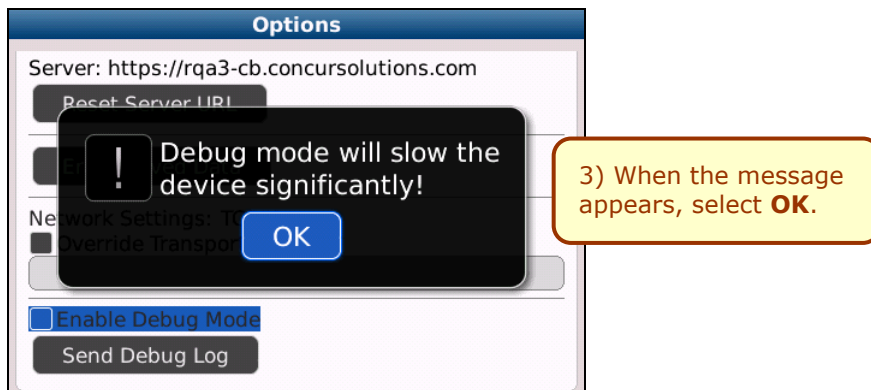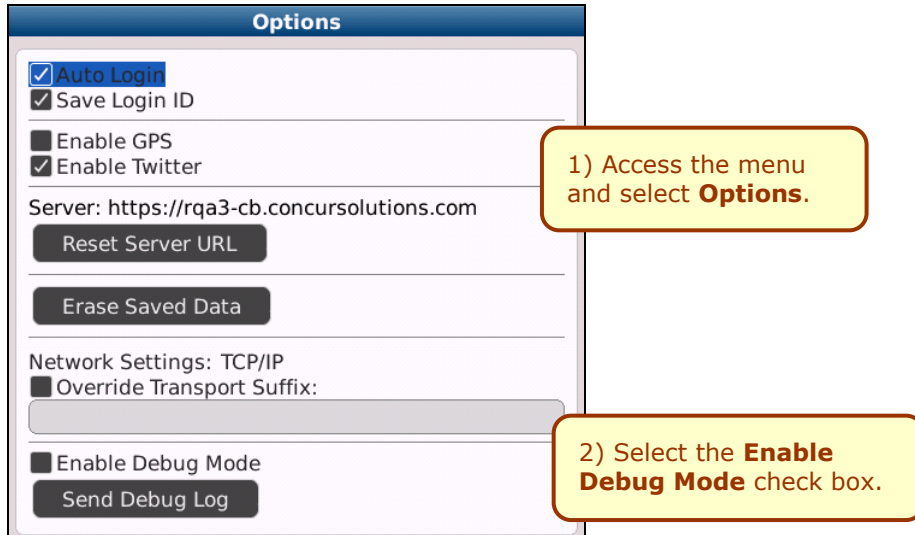## Miscellaneous

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

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

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

Then:

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**.
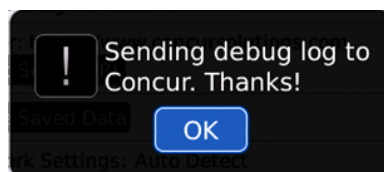
Change Network Settings

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
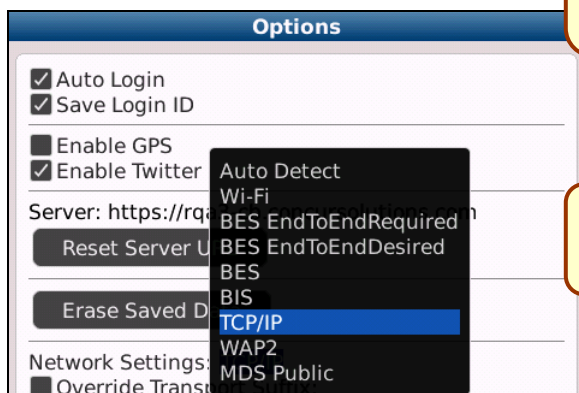
1) Access the main menu and select **Options**.
NOTE: You can access **Options** from the login screen.

2) Select **Network Settings**.
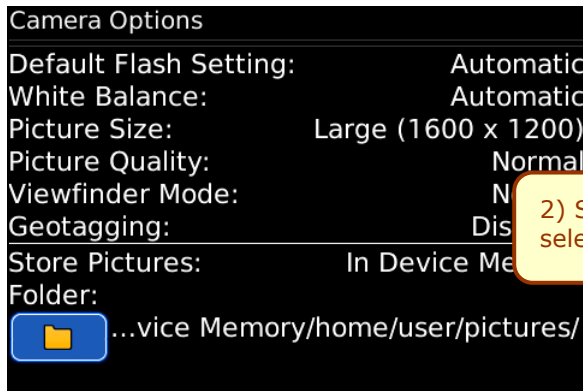3) Select the desired option.

Change Image Folder

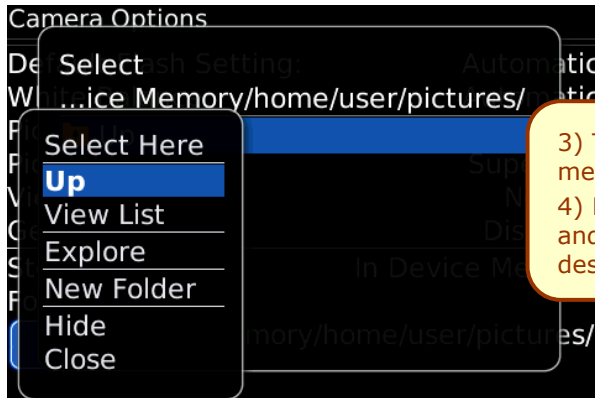The import image screen uses the device's default image folder.

To change the default folder, open the camera application on the BlackBerry.
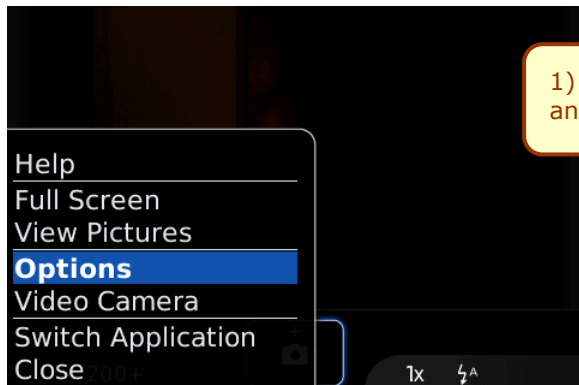
1) Select the main menu and select **Options**.

Camera Options
Default Flash Setting: Automatic
White Balance: Automatic
Picture Size: Large (1600 x 1200)
Picture Quality: Normal
Viewfinder Mode: N
Geotagging: Dis
Store Pictures: In Device Me
Folder:
          ...vice Memory/home/user/pictures/

2) Scroll to the folder and select it to open the folder.

Camera Options

Select
...ice Memory/home/user/pictures/

Select Here
Up
View List
Explore
New Folder
Hide
Close

3) To add a new folder, select the BlackBerry menu and select **New Folder**.

4) Navigate by selecting the BlackBerry menu and then selecting **Explore** or **Up**. Select the desired folder.

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.

Import Image
Directory: /store/home/user/pictures/

IMG00002-20110825-2029

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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**.
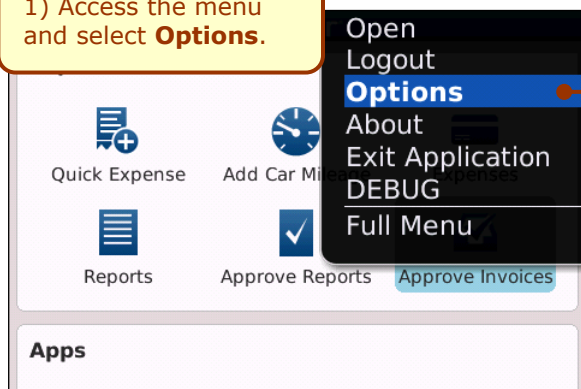
2) Select **Auto Login** to have Concur log in automatically when you open the app.
3) Select **Save Login ID** to have Concur remember and then provide your ID at login.
NOTE: You must select **Save Login ID** in order to use auto login.