This version shows the previous user interface. Though the home screen is different in the newest user interface, most procedures and processes remain the same. Videos are available in the training toolkit.

**Introduction to……..**

**Concur’s mobile app – BlackBerry®**

Version 8.6.3 - October 30 2012

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 flight, taxi, rental car, or hotel; and view the map.

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Applies to these Concur solutions:
- Expense
- Travel
- Travel & Expense
- Invoice
- Travel Request
Overview

Feature List

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

- View your itinerary
- Search for and book flights, hotel, rental car, and 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, taxi, and 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)

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

- Approve or reject travel requests (if you are a Travel Request approver)

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.
Users with the Travel Request Approver role have access to the travel request-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.

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.

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.
**Trips**

**Itinerary**

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

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

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

Access the menu on this screen 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 Flight**

Select the **Flight** icon on the home screen to search for and book a flight.

**NOTE:** Your company's configuration may prevent you from booking flights.

1) **Book Flight** screen, select **One Way** or **Round Trip**.
2) Enter the search criteria.
3) Select **Search Flights**.

4) Select the airline.

5) Select the flight.

6) Review the flight information.
7) Enter your frequent flyer information, if applicable.
8) Select/Verify your credit card.
9) Answer all trip-related questions that may appear on this screen.
10) Select **Reserve**.
**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.

---

**Ghost cards** are special credit cards used by some companies. If a ghost card is available to you in the web version of Concur, it will appear in the credit card list here, too.

---

1) Enter/Verify the search criteria.

2) Select **Search**.

3) Select the vendor.

4) Select the car.

5) Select/Verify your credit card.

6) 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.

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

**Ghost cards** are special credit cards used by some companies. If a ghost card is available to you in the web version of Concur, it will appear in the credit card list here, too.
Book 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.

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

3) Select the train.

**Ghost cards** are special credit cards used by some companies. If a ghost card is available to you in the web version of Concur, it will appear in the credit card list here, too.

4) Select the seat.

5) Select/Verify your credit card.
6) Select **Reserve Train**.
**Access Dining, Taxi, and Metro**

Depending on your company's configuration, you may be able to 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.

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.

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

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.
3) Enter the remaining information.
4) Take a photo of the receipt.
5) Select Save Expense.

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

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

1) On the Expenses screen, select the check box for the desired expense.
2) Access the menu.
3) Select Add To Report.
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.

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.
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.

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

2) Search for and select the location.

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

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

5) Select Save.

**VARIABLE RATE**

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

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

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

---

Add an Expense to an Open Report

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

2) Select the expense type.

3) Complete the remaining fields.

4) Select Save.

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

1) With the report open, 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**.

### View and Edit the Expense Report Header

1) With the report open, access the menu.
2) Select **Report Summary**.
3) Make the desired changes. Attach a receipt, add attendees, and itemize (as described on the following pages).
4) Select **Save**.
Itemize an Expense on an Expense Report

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

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

2) Select Itemizations.

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

When done, the itemization icon appears and the exception icon is gone.

To remove an itemization, select the itemization, access the menu, and select **Remove Itemization**.
**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 (including 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 configuration options. 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.

1) Select **Search Favorites**.

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.

**ADD ATTENDEE - ADDRESS BOOK**

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

1) Select **From Address Book**.

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

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.
**ADD ATTENDEE - SEARCH ATTENDEES**

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

1. Select **Search Attendees**.
2. Select the attendee type.
3. Enter the search criteria.
4. Select **Search**.
5. Select the desired attendee(s) in the search results.
6. Access the menu.
7. Select **Add Attendees**.

The attendee appears in the list and the totals are adjusted accordingly.
**ADD ATTENDEE - CREATE NEW ATTENDEE**

You can also create an attendee, if the attendee is not currently listed in your favorites of in Expense.

1) Select **Create New Attendee**.

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

When you add a new attendee, the system may check for duplicates. You may be asked to verify that the newly added attendee is, in fact, a new attendee and not a duplicate of an existing attendee.

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

**REMOVE ATTENDEES**

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

**EDIT COUNTS AND AMOUNTS**

Depending on your configuration, you may be able to edit counts and amounts:
1) Access the menu.
2) Select **Edit Amounts** or **Edit Counts**.
3) Make the desired changes.
4) Select **Done**.
   Totals are adjusted accordingly.

**ACCOUNT FOR "NO SHOWS"**

Depending on your configuration, you may be able to account for "no shows":
1) Access the menu.
2) Select **Edit Attendee No Shows**.
3) Enter the number of attendees who did not participate.
4) Select **Done**.
   Totals are adjusted accordingly.
**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)

**Approve 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.
Approve Expense 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.

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

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

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

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, these options appear:
- 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.
**Approve Travel Requests**

Select the **Travel Requests** icon to view, approve, and/or send back travel requests.

**IMPORTANT:** Clicking the **Travel Requests** icon will open up the BlackBerry Browser. You must then log into the mobile-enabled website. *Also, this is only supported for BlackBerries with OS 6.0 or higher.*

1) Select the **Travel Requests** icon.
2) Log in to the site.

3) Select **Travel Request Approvals**.
4) Select the desired travel request.

5) Review the summary (header), comments, segments, allocations, expected expenses, etc.
6) Select **Send Back** or **Approve**.
Approve 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. 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**.

Then:

1. Access the menu and select **Options**.
2. Select the **Enable Debug Mode** check box.
3. When the message appears, select **OK**.

![Debug mode will slow the device significantly!](image)

![Sending debug log to Concur. Thanks!](image)
**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**.
2) Scroll to the folder and select it to open the folder.

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.
**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** screen:
   - 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.