

- CLIENT FAQ -
Concur for Mobile
Android - BlackBerry - iPhone/iPad/iPod touch - Windows Phone
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General Information and Requirements

1. How is Concur for Mobile useful?

Concur for Mobile is a natural extension of Concur's full-featured, web-based service – Travel & Expense – which integrates travel and expense processes. With the mobile app, travelers can manage trips and expenses as well as book taxis, hotels, rail, and rental cars – all from a mobile device.

The solution allows business travelers to access important travel and expense information when it isn't easy to use a laptop that's connected to the Internet, such as in the back of a cab or in a meeting. With the mobile app, travelers can take advantage of a variety of features to manage these tasks.

Managers can review employees' expense reports, invoices (for clients who use Concur Invoice), trips, and requests (for clients who use Concur Request) in detail, allowing them to approve or reject reports/requests/trips wherever they may be traveling.

2. Does the mobile app offer the same functionality as Concur's full-featured, web-based service?

This app is a mobile companion to Travel & Expense – offering the flexibility to perform tasks from a mobile device. While it complements Concur's end-to-end solution functionality, it does not contain full functionality.

3. Why would a traveler need to manage travel, expenses, and payment requests using their mobile devices?

Business travelers can manage their itineraries and expense transactions in a timely manner and within company policies. Managers can review employees' expense reports, trips, and requests (for clients who use Concur Request) in detail, allowing them to approve or reject reports wherever they may be traveling.

With the convenience of Concur Invoice approvals on mobile devices, invoice cycle time is reduced, which reduces the risk of late payment fees and provides the opportunity to take advantage of early-pay discounts.

4. How does Concur for Mobile differ from competitive offerings?

Concur for Mobile encompasses travel features (like booking hotels and transportation) and expense features – to provide a comprehensive mobile solution for the business traveler. The mobile app makes the mobile worker more efficient and productive.

5. Is the mobile app available only to customers of Travel & Expense or can others, for example, stand-alone Travel customers, use it?

The mobile app is available to any client using Concur's integrated Travel & Expense. In addition:

- Stand-alone Travel users can access the Travel-related features.
- Stand-alone Expense users can access the Expense-related features. These users can also search for, book, and cancel taxi and dining (depending on the device).

NOTE: Concur for Mobile is *not* available to clients using Concur's *on-premise* stand-alone solution.

- Stand-alone Invoice approvers can review, approve, or reject payment requests as well as search for, book, and cancel taxi and dining (depending on the device).
- If the company uses Concur Request, request approvers can review and approve requests.
- If the company uses Concur's Locate & Alert service, all devices can be used by travelers to check-in and request assistance from their companies.

Over time, additional features will be added.

Also:

- Partner Travel Management Companies (TMCs) can send trip information to Concur using Web Services, enabling TMC customers – who are not Concur customers – to view itineraries on Concur for Mobile.
- For clients who use Travel and an expense solution **other than** Concur's expense service – the Travel-related features of the mobile app are available; the Expense-related features are not.
- TripLink users can also access their travel itineraries using a mobile device.

6. How does this mobile app differ from the mobile offering Concur announced in 2002?

Our previous mobile product allowed users to work offline in a disconnected laptop version and then synchronize the data while online. This version of Concur for Mobile allows users to access their expense and travel information using a mobile device.

7. Can a client make the mobile app available to only certain users?

No. Concur for Mobile is available for all of a client's users, based on general user roles – not a *mobile user* role:

- Users with the Travel Wizard User role can access the Travel-related features.
- Users with the Expense User role can access the Expense-related features.
- Users with the Expense Approver role can review and approve expense reports.
- Users with the Payment Approver role can access the Invoice-related features (if available on the device).
- Users with the Request Approver role can review and approve requests (if available on the device).

8. In which countries/languages is Concur for Mobile supported?

Concur for Mobile is available worldwide and supports U.S. English, U.K. English, Canadian French, French, German, Italian, Spanish, Japanese, Chinese, Brazilian Portuguese, Dutch, Latin American Spanish, Russian, and Swedish.

9. Which mobile devices can be used with the mobile app?

Currently, the app can be used with the BlackBerry, Android, Windows Phone, iPad, iPod touch, and iPhone – though features differ by device. On the Windows Phone, the features are currently limited to viewing trip information (car, air, hotel, rail, etc.), approving trips, creating mobile expenses, and capturing receipt images.

Users can check with their Concur administrators about the appropriate operating systems for each device. Clients can also access the supported configuration information located on Concur Support Portal.

10. Why isn't it offered for Palm or Symbian?

Concur plans to extend the mobile app to other platforms – based on client demand and market requirements.

11. Must the mobile user have access to the Internet?

Yes. Internet access is required to get started the first time.

12. If a mobile user has a mobile device but not a data plan, can he/she use the mobile app?

Yes. Users can connect over Wi-Fi.

13. Can one person use multiple devices for Concur for Mobile?

Yes. The same login can be used on multiple devices.

14. Can one mobile device be used for multiple people?

Yes. Multiple users can use the same device.

15. Is there a fee for the mobile app?

No. There is no additional charge to install or use the mobile app.

16. If service is lost, will the device save the activity/expenses that have already been created?

Yes.

17. How does Concur ensure that personal information remains secure?

Concur for Mobile is designed to conduct transactions without transmitting sensitive credit card or other personal data. Clients' credit card information stays in Concur's secure data center only – not on the mobile device. Using established technologies and practices, Concur ensures that our clients' information is safe and protected and that our services are available and perform properly, whether clients use Concur's web-based service or the mobile app.

Deployment, Installation, Configuration, and Logins/Mobile-Only Passwords

1. How is the mobile app activated?

Concur automatically activates the mobile app for all clients.

2. Do clients need a project team to deploy the app?

No. Concur for Mobile is activated for all users and will not require additional resources from the client's side.

3. How does a user install Concur for Mobile?

Users can access the app in these ways:

- On the Mobile Registration page (**Profile > Mobile Registration** in the web version of Concur), the user can:
 - ◆ Request that an email is sent to his/her device, where the user opens the email and follows the instructions.
– or –
 - ◆ Obtain the link using the appropriate (BlackBerry, App Store, Android, or Windows Phone) icon.
- On the mobile device, the user can go to appropriate store (BlackBerry App World, App Store, Google Play, or Windows Phone Store) and search for *Concur*.

In addition, companies using BlackBerry Enterprise Servers can also *push* it to its users.

4. The question above describes the individual installation emails. Is there a way to send these emails to a group of users?

Yes. The admin can select one or more Concur users and email them the Concur for Mobile instructions. This email is the same as the one that can be generated by the user on the Mobile Registration page.

The admin uses **Administration > Company Admin > Send Mobile Instructions** (left menu).

5. BlackBerry – Can Concur for Mobile be deployed via a BES (BlackBerry Enterprise Server)?

Yes. The app can be deployed via BlackBerry Enterprise Server (BES). There are three ways to manage this:

- **OTA:** Clients can configure their BES server to permit over-the-air (OTA) download and installation of third-party applications in order for their employees to use them.
- **BlackBerry App World:** Clients can configure their BES server to permit employees to download Concur from the BlackBerry App World.

There is a reference document available that explains the steps that a client must take in order to use BES. The document is available via the Concur Support Portal.

- **Push:** Concur can provide the installation files directly to clients, who can then provide them to their users. The client can install these files on the BlackBerry Enterprise Server and automatically *push* the application to all their users' BlackBerry.

Clients using the *push* installation method must also manage the upgrade of new releases of the app. These upgrades will occur quarterly. Clients will download a new set of files from the Concur Support Portal and push the new files to their users. There is a grace period before users are required to upgrade.

6. How does a user log in to the app?

The user can simply sign in with his/her email address (as shown in the user's Concur profile) or Concur username. Concur for Mobile then determines the company's logon method and directs the user to the proper sign-in page.

First-time users then enter their web password (if they know it) or tap **Forgot Password?** to create a mobile-only password.

A user can create (and change at any time) the mobile-only password using **Profile > Mobile Registration** in the web version of Concur. The user clicks **Forgot Mobile PIN** in the left-side menu to reset the existing mobile-only password. Concur sends a reset link to the registered email address of the user. The email contains a unique reset link that allows the user reset the password.

7. What is the average time to get up and running on the mobile app?

A user can complete the mobile-only password creation process and access the app in about five minutes.

8. BlackBerry – Is Concur for Mobile available for BlackBerry 10 devices?

BlackBerry 10 is not currently supported but it will be in the future.

9. BlackBerry – Does it require MDS to function?

Concur for Mobile is available as a BlackBerry application. BlackBerry Mobile Data Service (MDS) is supported but is not required.

10. BlackBerry – What does the Network Settings mean on the Options screen?

Auto Detect: This is the default setting. When this is set, the application will attempt each of the following connection types until it finds one that works. Order of attempt: Wi-Fi, BES, BIS, TCP/IP, WAP2, and MDS Public

- **Wi-Fi:** Wireless local area network

- **BES:** BlackBerry Enterprise Server; this is available only if the BlackBerry has been registered on a corporate server
 - ◆ **BES:** it has the EndToEnd**Required** option.
 - ◆ **BES-2:** it has the EndToEnd**Desired** option.
 - ◆ **BES-3:** it has no end-to-end option.
- **BIS:** BlackBerry Internet Service; the service is usually provisioned through a mobile phone service provider
- **TCP/IP:** Transmission Control Protocol (TCP) and the Internet Protocol (IP)
- **WAP2:** Wireless Application Protocol
- **MDS Public:** Used for international users with devices from one country in conjunction with a different country's wireless provider

NOTE: When Concur is installed on the BlackBerry, it is installed with **Auto Detect** selected, which is the preferred network setting. If a connection type other than **Auto Detect** is selected, only that connection type will be attempted.

11. As Concur enhances the application, how will users receive software updates?

The method for receiving software updates depends on the device and how the application was first installed.

BlackBerry:

- Users who downloaded the application from BlackBerry App World will automatically be notified by App World when an update is available. Users should download updates promptly.
- BlackBerry users who work for companies that deploy applications using the BlackBerry Enterprise Server (BES) will either have the updated application *pushed* to their BlackBerry or receive other instructions from their administrator.
- Users who have download from <http://mobile.ota.concursolutions.com/mobile.aspx> will be prompted the next time they login and a new version is available

All other devices: Users who downloaded the application from a store will automatically be notified by the store when an update is available. Users should download updates promptly.

12. How does a user re-set his/her mobile-only password?

Users can reset the mobile-only password on the Mobile Registration page (**Profile > Mobile Registration**) in the web version of Concur.

13. How does an administrator re-set a mobile-only password?

The company's mobile administrator can clear a user's mobile-only password. When done, the user must re-enter a new mobile-only password to access the mobile app.

To do so, the administrator can access the user's information in **Administration > Company Admin** (in the web version of Concur) and select the **Remote wipe mobile device** check box for the user.

14. What should a Concur for Mobile user do if his/her mobile device is lost or stolen?

If the user logs in to the mobile app using his/her web login, then the user should immediately change that password. If the user logs in to the mobile app using a mobile-only password, the user should access **Profile > Mobile Registration** (in the web version of Concur) and change his/her mobile-only password.

Minimal information is stored locally on the mobile device, for example, information entered off-line is stored until the app reconnects to the Internet and syncs with Concur. **Credit card information is never stored on the mobile device.** As an added precaution after losing a device, the company's mobile administrator may remotely wipe data from device through the User Administration tool.

If the administrator selects the **Remote wipe mobile device** check box for the user, the next time a user logs into the mobile app (either through manual login or auto-login), all mobile data will be cleared from the device.

Expenses and Expense Reports

1. Are all Expense-related features available on all devices?

The features differ by device, client configuration, and user permissions.

- **By device:** For example, devices without cameras cannot capture receipt images.
- **By client configuration:** For example, the client configuration may or may not allow certain types of expenses. Also, some features (menu options) may appear on the device but are unavailable (gray) to the user.
- **By user permissions:** For example, only Expense approvers can see the features related to Expense approvals.

The Windows Phone offers limited features at this time.

2. Which functions can a user perform with regards to managing their expenses and reports?

A user can add, view, and edit expenses and expense reports (including report status and expense details); create *mobile* "quick" expenses (for items such as meals) as well as edit or delete them; take a picture of the associated receipt; create new expense reports; attach downloaded credit card transactions and mobile "quick" expenses to an expense report; and submit reports.

3. How much information can be edited by the user?

iPhone/iPad/iPod touch, Android, and BlackBerry users can edit report header fields and most expense fields after the expense is attached to a report. When using lists, the same list data is available on the mobile device as is available in the web version of Expense.

4. Can a user itemize an expense using the mobile app?

iPhone/iPad/iPod touch, Android, and BlackBerry users can itemize an expense (after the expense is added to a report), if allowed in the client configuration.

5. Can a user remove itemizations from an expense?

Yes. Itemizations can be removed via the mobile device.

iPhone/iPad: The user:

- Opens the expense and the list of itemizations.
- Swipes across the desired itemization. A red **Delete** button appears.
- Selects **Delete**.

Android: The user:

- Opens the expense and the list of itemizations.
- Long presses on the desired itemization. A menu appears.
- Selects **Remove from Report** on the menu.

BlackBerry: The user:

- Opens the expense and the list of itemizations.
- Highlights the desired itemization.
- Accesses the BlackBerry menu.
- Selects the **Remove Itemization** option on the menu.

6. Can a user add attendees using the mobile app?

iPhone/iPad/iPod touch, Android, and BlackBerry users can add attendees to an expense *after* the expense is added to a report. The user can:

- Search the user's contact list on the mobile device
- Search for attendees in the user's *favorites* attendee list
- Search for attendees in all company attendee lists
- Search an external source (if this feature is available on the web version or Expense)
- Add the attendee manually

7. Can users enter personal car mileage?

iPhone/iPad/iPod touch, Android, and BlackBerry users can add fixed-rate and variable-rate mileage expenses, if allowed in the client configuration.

8. How is a *quick* expense different from a *regular* expense – an expense entered using the web version of Concur?

A mobile user can create a "quick" expense (which contains basic information such as date, amount, and expense type) and attach an image of the receipt. More intricate expenses – with attendees, car mileage, and itemizations – can be added to an expense once the expense is included in a report.

9. Can a user delete expenses using a mobile device?

That depends.

- **Deleting an expense from the expense list:** The expense list contains mobile expenses (expense created on the mobile device) and card transactions.
 - ◆ A user can delete a mobile expense.
 - ◆ In some cases, the user must access the web version of Concur to delete card transactions - assuming the user's company allows the user to do so.
- **Deleting an expense from an expense report:** A report may contain all kinds of expenses.
 - ◆ If the user deletes a mobile expense or a card transaction from an expense report, it is not really deleted; it is moved back to the pool of expenses on the **Expenses** screen (the expense list).
 - ◆ If the user deletes any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of Expense.)

10. How does a user delete a mobile expense?

A mobile expense (an expense created on the mobile device) can be deleted only on the mobile device itself from the **Expenses** screen (the expense list). Once deleted from the mobile device, it will no longer appear online or be available for import into an expense report.

If a user deletes an expense in the web version of Concur and that expense was originally a mobile expense – that expense is not deleted from the system – instead, it moves back to the "pool" of mobile expense on the user's device. The user must then delete it using the mobile device.

11. Can my delegate manage my expenses and reports via the mobile app?

The mobile app does not support delegates or proxies.

12. Do all expenses entered on the mobile device appear with the purple smartphone icon when viewed in the web version of Expense?

No. Only mobile expense will have the icon. Expenses added to an open report will not have the icon. Mobile expense usually contain minimal information; the icon could remind the user to add any missing information.

13. Do expense types have to be mapped for the mobile app? Are there defined expense types in the mobile app that need to be mapped to the client's configuration?

No. By default, the expense types used for the mobile app are the same as the expense types used in the web version of Concur. However, the full list of expense types may be cumbersome so the client may want to shorten the list for mobile users.

To do so, the client contacts Concur Client Support for assistance.

14. Does everything in a client's configuration appear on the mobile device (for example, vendor lists or attendee lists)?

Lists are generally available but some parts of the configuration (such as travel allowances) are not currently available in the mobile app. The user enters that information once the mobile expenses are imported into an expense report in the web version of Concur.

15. Can a user capture an image of the receipt and attach the image to the expense?

Yes. All receipt images, captured by the mobile device's camera, will upload into Travel & Expense immediately or the next time the mobile app connects to the Internet. Once the digital image is imported into an expense report, the receipt image is treated like other receipt images and can be viewed (in a PDF viewer) by the user, approver, and processor.

16. Does a digital photo of a receipt meet IRS guidelines for expense documentation?

Yes.

17. BlackBerry – Does the user need any special settings to use the BlackBerry camera for receipts?

In the camera options:

- The picture size should be set to medium (1024 x 768) or smaller.
- The picture quality should be set to normal.

The user should refer to the owner guide for information about accessing these settings.

18. iPhone/iPad/iPod Touch – Does it take a long time to upload the receipt images?

When the user takes a receipt image and attaches it to either an expense or report header, Concur will compress the image. This increases the performance of loading receipt images and reduces the file size by automatically resizing the image. The image quality is retained while performance is enhanced.

19. BlackBerry – Does a user or an approver need any special settings to view receipt images?

Occasionally, with a BlackBerry, the image details are not initially very clear. The user can improve the view by selecting the BlackBerry menu while viewing the image and then use the option to zoom in/out or to change the view to page view, column view, or desktop view. (View options differ by model.)

20. What functionality is available for Expense managers with regards to expense report approval?

Approvers can view employee expense reports including expense detail, report header information, receipt images, attendees, itemizations, and exceptions. Managers can approve or reject the *entire* expense report from their mobile device. (Just like the web version, managers must enter a comment when rejecting a report.)

Managers cannot, however, adjust expense amounts. That task must be done using the web version of Concur. (This is assuming that the company's configuration allows approvers to adjust amounts).

21. Are all Expense approval workflows available in the mobile app?

Concur for Mobile does not currently support dynamic workflow. If an approver needs to select the next approver, he/she will see a message that the mobile app does not support this workflow; therefore, the report must be approved using the web version of Expense.

If the web version of Expense is configured so that an approver can send the expense report directly to Accounting Review, bypassing all remaining approvers, then the approver can do the same using the mobile app.

If the web version of Expense is configured so that the user can select his/her approver on submit, then the user can do the same using the mobile app. However, that approver cannot select a different approver.

Travel

1. With Concur for Mobile, can a user manage his/her trip itinerary?

A user can view his/her itineraries, with details about flights, hotels, rental cars, vendors, and maps.

iPhone/iPad/iPod touch, Android, and BlackBerry users can search for and book air, rental car, hotel, and Amtrak, if allowed in the client's configuration.

Note the following:

- If Concur Request is integrated with Concur Travel, then the user **cannot book travel using the mobile device**. The user must book travel in the web version of Concur to ensure the proper interaction between Request and Travel.
- Users cannot book flights if the feature is deactivated by the company's TMC.
- **The Windows Phone is view only.**

Also, depending on the type of device, there are third-party apps available. Using these apps, the user may also be able to book taxi, dining, and public transportation.

2. Will a user incur a charge by using the mobile app?

If a user appends an existing itinerary by adding a hotel or car reservation through Concur for Mobile, there is not an additional booking fee applied.

3. Can a user change his/her itinerary?

Yes. A user can change his/her itinerary such as add or cancel dining (depending on the device), hotels, taxis, or rental cars. Flight information cannot be changed using the mobile app.

4. Can a user manage his/her hotel reservations?

Yes. The user can book hotel from the mobile device home screen or from an existing itinerary. Either way, the search results include rates, images, descriptions, cancellation policy, star rankings, maps, hotel policy, and hotel facilities.

5. Can a user see hotel properties that are company-preferred?

Yes. A maximum of 30 results are returned, sorted as follows:

- First: All company-preferred properties sorted by preference level, and then secondary sorted by distance
- Next: All properties that are not company-preferred but have rooms in compliance, and then secondary sorted by distance (Note that these properties may also have non-compliant rooms)
- Next: All properties that are not company approved and have no rooms in compliance, and then secondary sorted by distance

For the iPhone / iPad / iPod touch and Android, the **Load more hotels** link appears after the first 30 hotel search results. The user can tap that link to access more results.

6. Can a user see hotel properties that support e-receipts?

No.

7. If a user books a hotel room after business hours but the user's manager is not available to approve the reservation, will the reservation be confirmed?

If the client's workflow does not allow a user to book a hotel without manager approval, the user must contact the hotel or travel agent directly.

8. Can a user manage his/her ground transportation?

Yes. A user can book ground transportation by renting a car or booking a local taxi. The user receives a car confirmation and an updated itinerary (if applicable).

9. What about public transportation?

On the iPhone/iPad/iPod touch and BlackBerry, users can locate public transportation using the mobile device. The first step is to download the MetrO app, using the link provided on the mobile device. The user selects the desired city and then enters the criteria. Public transportation options are provided.

10. How does a user rent a car?

The user can rent a car from the home screen or from an existing itinerary. Either way, the search results provide a list of available cars, rates, images, and vendor phone numbers.

11. How does a user reserve a taxi?

The first step is to download the Taxi Magic (RideCharge) app, using the link provided on the mobile device. The user enters the search criteria and selects the appropriate ride.

If the user has set up his/her Taxi Magic account in the web version of Concur, the taxi reservation will appear on both the web version and mobile under **Trips**.

12. Must a user use Travel in order to pay for a taxi using his/her mobile device?

No.

13. Does the mobile app use GPS for dining reservations?

The mobile BlackBerry app uses leading dining application such as OpenTable. This application makes use of the user's location to improve the search experience.

14. Will GPS information be available on all mobile devices?

The GPS capability depends on the device *and* provider.

If a client is having issues with GPS, there are several troubleshooting steps that the user should take:

- First, does the user have a third-party mapping application like Google Maps installed?
 - ◆ If so, does it recognize the user's GPS?
 - ◆ If not, then the user's mobile device may not have GPS.

NOTE: In some office buildings, GPS signal is too weak to determine location. The user should stand by a window or go outside to test it.

- If the device is a Verizon phone, note that Verizon has locked the GPS on many models so that it works *only* with Verizon VZNavigator. However, Verizon has recently published ROM updates that unlock some of their premium models, including the HTC Touch Pro, Samsung Saga, Samsung Omnia i910, BlackBerry Pearl 8339, and BlackBerry Curve 8130.

Note that updating the ROM on a device may remove all of the user's contacts, email messages, and other data.

For more information, the user must contact Verizon directly.

15.What functionality is available for travel managers (trip approvers) with regards to trip approval?

Travel managers can approve trips.

16.Do mobile bookings that require manager approval trigger the approval email?

Just like the web version of Concur, the trip is flagged for approval, it is placed in the approval queue, and the manager is sent an approval email.

17.What corporate card information is stored on the Mobile device?

The *only* piece of card information that is held on the mobile device is the name the user has set up for the corporate card (in Profile in the web version of Concur) and the last 4 digits. The full card number is never displayed on the device.

18.If the company uses a ghost card, can the user use it for the mobile app?

Yes. It will be presented to the user as a form of payment. The user can use it or any other card that is listed in his/her profile.

NOTE: A *ghost* card is a specific type of company credit card.

19.If a company uses only ghost cards for booking travel, can a user book travel if only a ghost card is available?

Yes.

20.Sometimes, a TMC can affect a client's ability to use a feature. For instance, if a TMC partner does not support a particular feature, then that feature is not available to the client. Is this the case with the mobile app?

The only feature that TMCs can affect is the ability to book flight if the TMC uses Sabre.

TMCs can enable non-Concur clients to use Concur for Mobile by sending itineraries to Concur's itinerary database using web services. For additional information about web services, refer to the Concur Support Portal.

21.Does the mobile app allow the user to view weather conditions at their final destination?

The user may have to access this information using the weather apps on the mobile device.

22.Does the mobile app support client-defined (custom) trip fields?

Yes.

23.Can I use voice with Concur for Mobile?

Currently, users can use voice to search for hotel, car, and air on Android and iPhone/iPad devices.

Payment Requests (Concur Invoice)

1. Which Invoice features are available using Concur for Mobile?

On the iPhone/iPad/iPod touch, Android, and BlackBerry, a payment approver can use Concur for Mobile to view line items, header information, vendor information, and images. The approver can then approve the payment request or send it back to the invoice owner.

Purchase requests can be approved on the Android and iPhone/iPad/iPod touch.

2. Can the approver do anything else?

The approver can also use the mobile device to search for, book, and cancel taxi and dining on the device.

Requests (Concur Request)

1. Which Request features are available using Concur for Mobile?

A request approver can use Concur for Mobile to view header, segment, and expected expense information as well as images. The approver can then approve the request or send it back to the request user. Additional features will be added over time.