Concur Mobile Quick-start Guide



Step 1: Log into Concur

Cliqbook and Concur are now 'connected' and so you can access them from one URL: <u>ConcurSolutions.com</u>. The previous Cliqbook log in URL (<u>www.MyOuttask.com</u>) will also continue to work and provide access to the combined Concur/Cliqbook website. Your log in information is the same for both websites.

Go to <u>ConcurSolutions.com</u> to log in to the system. Your user name is your Planar email address. The password for all users is **Welcome1** (case sensitive). Even if you have previously used the Cliqbook website, your password has been reset to **Welcome1**. When you log in the first time, you will be prompted to change your password.

After you have logged in for the first time, confirm that your name appears correctly in the upper left hand corner.

C. My Concur - Diana Rae Baumgartner							
Welcome,	Welcome, Diana Rae Baumgartner [You are administering for: <u>Yourself</u>]						
C•n	C-ncur						
My Concur	Travel	Expense	Reporting	Administration	Profile		

Step 2: Set your Registration PIN

From the My Concur page select Profile and then select Mobile Registration

	Welcome, Diana Rae Baumgar	tner						
ĺ	C-ncur [•]							
	My Concur Travel Exp	ense Reporting	Administration	Profile				
	Personal Information Change Pas	sword System Settin	gs Mobile Registration	Travel Vacation Reassignment	System E-Mail Settings			
	My Profile	Select one of the folk	wing to customize your	user profile.				
	Your Information Personal Information Company Information Contact Information Emergency Contact Credit Cards	Personal Information You home address and emergency contact information. Company Information Your company name and business address or your remote location address.						
	Travel Settings	You can st	ord Information Fore your credit card information	tion here so you don't have to re-ent	er it each time you purchase an item			
	Travel Preferences International Travel Frequent-Traveler Programs Assistants/Arrangers	Enable e-	t Activation receipts to automatically rec	eive electronic receipts from participa	ating vendors.			
	Expense Settings	Soing to b	cation Reassignment	re vour backup travel manager.				
	Expense Information Bank Information Expense Delegates Expense Approvers Favorite Attendees	Expense Delegates	Expense Delegates Delegates are employees who are allowed to perform work on behalf of other employees.					
	Other Settings	Change p	arameters for automated sy	stem E-Mails.				
	E-Receipt Activation System Settings Change Password Privacy Statement System E-mail Settings Travel Vacation Reassignment Vobbie Regression	Set up PIN	eqistration I to access Concur for mobili	e on your BlackBerry or Windows Mob	ile Device			

Create a mobile PIN and enter it into the provided fields. Your PIN can include letters, numbers, and special characters such as 1,\$ or # but no spaces.



iPhone Users: Search for **Concur Mobile** in the App Store.

Blackberry Users: Download Concur for mobile by going to <u>http://mobile.ota.concursolutions.com/mobile.aspx</u> from your device web browser. Android Users: Search for **Concur Mobile** in the Android Market, or use your phone to scan the barcode on the **Mobile Registration** page

Welcome To Concur for Mobile	
Set PIN	
Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso Concurso	To log in to Concurrently device, you must enter your User Name and a Mobile 70X. Your User Name Is Diana.Baxenganteer@planar.com 17 you have not yet set up or need to change a 70X, enter a 70X (which can include letter), numbers, and spaced changes to up. 1.5 or 6 burno spaced in the Read balow. Mobile 70X Venty Mobile 70X Creater Updater Mobile 70X Creater Updater Mobile 70X
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Concur for mobile is available on BlackBerry	y, iPhone and Android devices!
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Step 4: Log in to Concur Mobile

Open the Concur Mobile App on your phone and enter your user name (your Planar email address) and the PIN that you set up in Step 2 above.

Step 5: Use Concur Mobile

You can now use your phone to do nearly everything you can on the full website, including (but not limited to) the following:

- Create a new expense report
- Enter a new expense and either add it to an expense report or wait and attach it to an expense report the next time you log in to the full website
- Attach receipts to expense reports using the camera on your mobile phone
- Submit an expense report to your manager
- Review and approve an expense report for your direct report

There are certain expense types that will require you to log into the full website prior to submitting your expense report. The application will automatically prompt you to do this if you attempt to submit an expense that requires additional information. For example—Group Meals and Entertainment items can be entered in the mobile application. However, attendees at these meals must be added via the full website. Concur is continually updating Concur Mobile, and we hope that within the relatively near future, full functionality will be available on the Mobile application.

Additional Guidance

The look and feel of each Smartphone App is slighty different. For a more detailed explanation of each of the applications and its features, please refer to the user guides prepared by Concur:

Concur Mobile for the iPhone: <u>http://www.concurtraining.com/customers/tech_pubs/MobileDocs/Intro_Mobile_iPhone.pdf</u> Concur Mobile for the Blackberry: <u>http://www.concurtraining.com/customers/tech_pubs/MobileDocs/Intro_Mobile_BB2.pdf</u> Concur Mobile for the Android: <u>http://www.concurtraining.com/customers/tech_pubs/MobileDocs/Intro_Mobile_Android.pdf</u>