

How to Approve an Expense Report in CardQuest via Mobile App (iPhone)

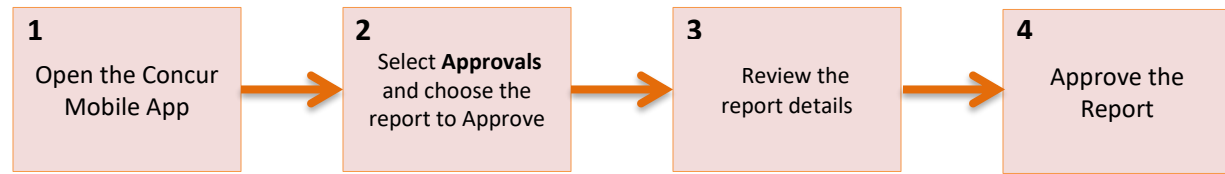
Summary

This guide will explain how to approve an expense report using the Concur Mobile App on an iPhone. This guide assumes you have the app already installed. **For help installing the Concur mobile app, please email cardquesthelp@caltech.edu.**

Expense report Approver functionality **not** available in the mobile app:

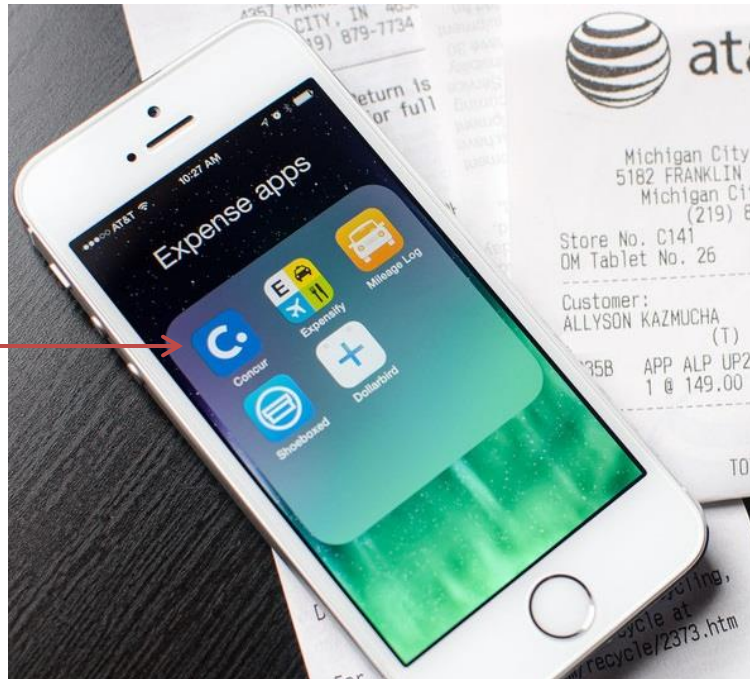
1. View Project/Task/Award/Expenditure Type allocation detail
2. Approve & Forward to another Approver
3. Viewing the audit trail

Procedure



Step 1

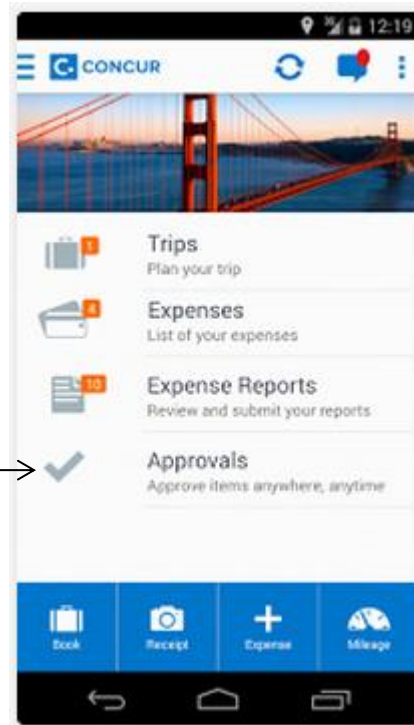
Open the Concur Mobile App.*



*This guide assumes you have the Concur app already installed. Contact cardquesthelp@caltech.edu for help installing the app on your phone.

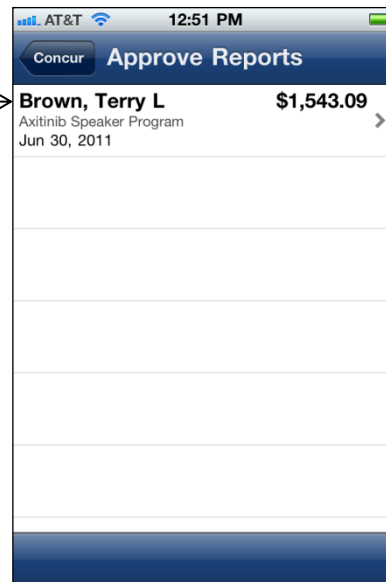
Step 2

Select **Approvals** from the Home Page.



Step 3

Find the report that you would like to approve. Select this report to open.



Step 4

After selecting the report name in **Step 3**, the report will open.

Please **review the charges** in the report to certify that the report correctly describes the actual amount of allowable business expenses incurred in the performance of your assigned duties.

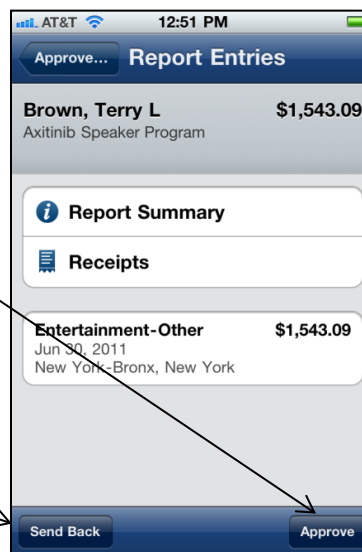
4a) To review charges, **select a charge** from the Report Entries screen. Then **view the receipt** or Attendee details (if applicable).



Important: you will not be able to view the Project/Task/Award allocation details for the expense entries in the mobile app. If you need to verify the PTA allocation as part of your approval, please log into the CardQuest desktop application via access.caltech.

4b) Once you have verified that the receipts and charges are all allowable, select the **Approve** button. The approved report will either be forwarded to the PCard team to audit or be sent for payment if there is a reimbursement owed.

If there was missing info or corrections needed, you can select the **Send Back** button to send the report back to the user with a comment.



Important: The mobile app does not support Approve & Forward functionality. If you need to Approve & Forward, please log into the CardQuest desktop application via access.caltech.

Exceptions

1. You will **not be able to view the Project/Task/Award allocation details** for the expense entries in the mobile app. If you need to verify the PTA allocation as part of your approval, please log into the **CardQuest desktop application via access.caltech.**
2. The mobile app **does not support Approve & Forward functionality.** If you need to Approve & Forward, please log into the **CardQuest desktop application via access.caltech.**

CardQuest Help

Visit the CardQuest webpage:

<https://procurement.caltech.edu/cardquest/>

Email us your questions:

cardquesthelp@caltech.edu

Call the Procurement Services Hotline:

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