

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

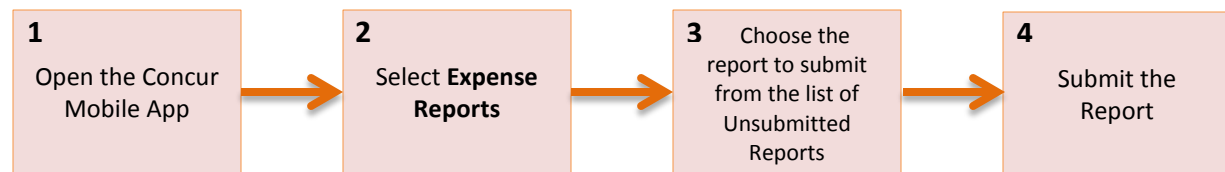
### Summary

This guide will explain how to submit an expense report using the Concur Mobile App on an iPhone. This can be a report that you have created yourself or a report that was created by your delegate. Your delegate is someone that has been assigned to your profile in CardQuest and has the ability to create your expense reports in CardQuest. This guide assumes you have the app already installed. **For help installing the Concur mobile app, please email [cardquesthelp@caltech.edu](mailto:cardquesthelp@caltech.edu).**

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

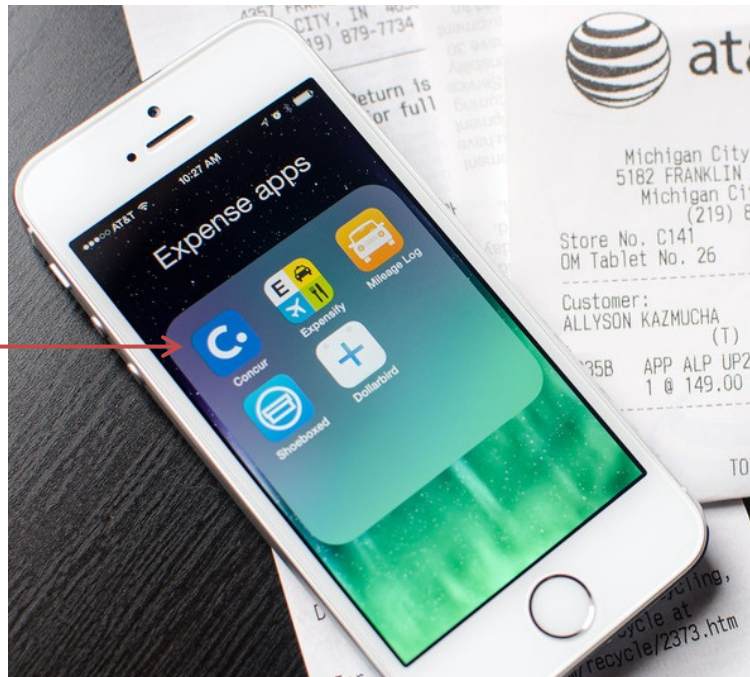
1. Enter or view Project/Task/Award/Expenditure Type allocation detail
2. Requesting or assigning a cash advance
3. Viewing the audit trail
4. Creating per diems

### Procedure



### Step 1

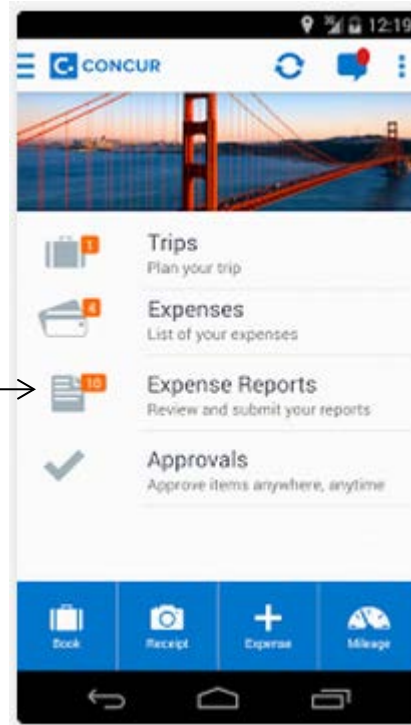
Open the Concur Mobile App.\*



\*This guide assumes you have the Concur app already installed. Contact [cardquesthelp@caltech.edu](mailto:cardquesthelp@caltech.edu) for help installing the app on your phone.

## Step 2

Select **Expense Reports** from the Home Page.



## Step 3

Find the report that your delegate has informed you is ready to submit. 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.

After reviewing the charges, hit the **Submit Report** button. The report has now been submitted and automatically transmitted to your Approver for their review.



## Exceptions

1. If **corrections are needed** before submitting the report, you can either **make the corrections yourself** in the report **or let your delegate know** the changes that are needed so they can make them for you.
2. If you received any **errors or warnings** after hitting **Submit Report** (for example, missing receipts or allocations) you can **make the corrections yourself or contact your delegate** so they can make the necessary corrections before you **submit your report again**.
3. If your **Approver sends back the report** with a request for more information, your delegate will have received an email notification and will work with you to make the changes to the report. After the necessary changes have been made, you can **submit the report again**.
4. **If you need to verify allocation details before submitting, you cannot do this from the mobile app.** You will have to login to the CardQuest desktop application (via [access.caltech](http://access.caltech)) to verify allocation details for your report.

## CardQuest Help

Visit the CardQuest webpage:

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

Email us your questions:

[cardquesthelp@caltech.edu](mailto:cardquesthelp@caltech.edu)

Call the Procurement Services Hotline:

(626) 395-8900

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