Concur Expense
MGA Geo Unit Treasurer Workshop

October 2020

Modified for 2022 Region 5 Annual Meeting
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Concur Introduction

What is Concur?

Concur Expense is a cloud-based expense management application, including secure mobile access for your on-the-go volunteers/employees, company card and electronic receipt integrations.

Advantages of Using Concur

- Quicker Reimbursement
- Access Concur on any platform if you log into IEEE’s network
- The Concur Mobile app expands accessibility to create & approve expense reports anytime/anywhere

When to Use Concur

- Reimbursement of out-of-pocket expenses for Volunteers & IEEE Professional Staff
- IEEE will reimburse for travel and non-travel related expenses such as office supplies, shipping, dues/membership, registration fees, etc.
Logging into Concur Is as Easy as 1-2-3

Always access Concur with your IEEE credentials via ieee.org/concur. Never attempt to access Concur directly through concur.com. (Appendix A)

1. Getting Started
   • You need an IEEE Account (IEEE username/password) -- hit blue Request button if needed
   • Log into your IEEE account with your IEEE username and password, and request to have a Concur account created for you.
   • Account creation takes approximately 24-36 hours. Once your account is created, you will receive an email with log in instructions. (Appendix B/C)

2. Access Concur
   • Click the orange “Log In” button for direct access to Concur

3. Experience the benefits of the mobile app:
   • Submit your reports anytime, anywhere (Appendix D)
Expense Report Process

Creating an Expense Report

- Submitter will select 4-tiered Expense Report Purpose (ERP) Levels and Expense Types
  - The ERP selections drive:
    - Accounting, CB Account number/HOP number
    - Approval Flow
    - The ERP can be changed at the line-item level for splitting/itemizing expenses (Appendix E)
  - Select the expense type associated with the transaction (Appendix F)

Approval Flow of Expense Report

- Approver(s) – Treasurer (at a minimum)
  - Best Practice is to have 2 Approvers per expense report purpose
- Standard IEEE review and processing typically takes 3-5 business days

Report is Ready for Payment

- Payment is made electronically directly to your bank account (paper checks have been discontinued)
Tips & Tricks

Concur Mobile App
- Allows you to create, submit, and/or approve expense reports directly from your phone or tablet
- Take a photo of your receipts with the mobile app and Concur’s OCR Technology will help auto-populate expense lines

Receipt Options
- Email receipts to: receipts@expenseit.com they will automatically upload into your Concur profile
- Integration with 3rd party applications (e.g., Uber, Lyft, etc.) result in electronic receipt creation
- A missing receipt affidavit can be applied if a receipt is lost/damaged (Appendix I)
Tips & Tricks (continued)

- **When Entering Transactions in a Foreign Currency**
  - Use the currency shown on the receipt, Concur converts the transaction to user’s local currency.
  - Reimbursements are made in user’s local currency.

- **When Entering Expense Report Purposes (ERPs)**
  - If you do not know which ERP to use, please contact your Region Treasurer or dedicated IEEE staff support for assistance.

- **Complete your Concur Profile**
  - Click Profile > Profile Settings. View personal information, verify email address and notification preferences, etc.

- **Submit Your Expenses for Reimbursement**
  - Please submit your expenses for reimbursement within 60 days of being incurred, in accordance with the IEEE Travel & Expense Reimbursement Guidelines.
Common Expense Report Mistakes

- Transactions in excess of USD $25 require a receipt
  - Credit Card Statements are not a valid substitute for receipts

- When entering expenses in Concur, you must use the currency in which the transaction was incurred

- Expenses must be recorded on the date the transaction occurred
  - Receipt date = Transaction date

- Concur Account Access *(Appendix A)*
  - You must log into Concur via the link on ieee.org and select the *orange* log in button
  - Username & Password are *not* required due to integration with IEEE Single Sign On Network
Common Mistakes: Receipt Date <> Transaction Date
Advantages of Using Concur

- **Audit Trail & Approval Flow**
  - Real-time audit/status tracking visible to the submitter
  - To view the approval flow for your expense report
    - Details > Approval Flow > Click on the Bolded ERP to expose the approval flow (Appendix J)
    - Please note: you can only see the approval flow after the report has been submitted

- **Currency Conversions** (Appendix F)
  - Concur automatically converts foreign currency transactions on the user's behalf
  - If the currency conversion calculated by Concur differs from the conversion charged on your credit card, you can submit a separate expense line for Currency Exchange Fees to make your reimbursement whole

- **Delegate Responsibility** (Appendix K)
  - Users can designate a delegate to submit/approve expense reports on their behalf
    - A missing receipt affidavit cannot be submitted by a delegate
    - A delegate cannot change profile information i.e., bank info, address, etc.
Additional Resources

Access the Concur Homepage with your IEEE credentials via ieee.org/concur. Once on the page, you will have access to the following resources:

- Concur Checklist

- Mobile App
  - View a comprehensive video on how to log into the Concur Mobile App (Appendix D)

- Training and Quick Reference
  - View a self paced video tutorial
  - View Expense Report Purpose (ERP) library

- Frequently Asked Questions
Questions

Please send all questions, comments, feedback and suggestions to: concurfeedback@ieee.org
Appendix

A. Concur Account Log In
B. Concur Sample Enrollment Email – reimbursement in USD, CAD, EUR, INR
C. Mobile App – Access Anytime, Anywhere
D. Tiered Expense Report Purpose (ERP) Levels
E. Expense Types
F. Missing Receipt Affidavit
G. Approval Flow
H. Delegates
I. Region & Section Treasurer’s Role
J. Region 5 Example
Appendix A

Concur Account Log In

Concur Home Page on ieee.org/concur (no username/password required)
Appendix B

Concur Sample Enrollment Email (reimbursement in USD, CAD, EUR, INR)

--------- Forwarded message ---------
From: <concurfeedback@ieee.org>
Date: Thu, Aug 8, 2019 at 2:22 PM
Subject: Your IEEE Concur account
To: <n.b.chandana@ieee.org>

Dear Anar Vildarsson,

Your account with Concur has been established.

**STEP 1**
To login, please go to the IEEE Expense Report webpage. You **MUST** use this webpage to login.

**STEP 2**
Click on the orange "Log In" button. You may be prompted to enter your IEEE account credentials. A separate username and password are **NOT** needed due to IEEE single sign-on.

**STEP 3**
You **MUST** enter your banking information for electronic reimbursement before submitting an expense report.

To help you get started, please check out the following resources, which can also be found on the IEEE Expense Report webpage.

- [Frequently Asked Questions](#)
- [Self-Service Training Videos](#)

Thank you.

Please do not reply to this email; This address is not monitored. Please refer to the IEEE Expense Report webpage for further assistance.
Appendix C

Mobile App – Access Anytime, Anywhere

Log into the mobile app securely using IEEE’s Single Sign On (SSO) passcode (EDDB6G):

Use the ExpenseIt feature to upload a receipt image directly into your Concur profile as seen below:
Appendix D

Tiered Expense Report Purpose (ERP) Levels

Section Example

Region Example
## Appendix E

### Expense Types

<table>
<thead>
<tr>
<th>All Expense Types</th>
<th>01. Travel Expenses</th>
<th>02. Transportation</th>
<th>03. Meals</th>
<th>07. Fees</th>
<th>08. Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hotel</td>
<td>Parking</td>
<td>Meals with Guests</td>
<td>Agency Booking Fees</td>
<td>Marketing/Promotional Materials</td>
</tr>
<tr>
<td></td>
<td>Laundry</td>
<td>Personal Car Mileage</td>
<td></td>
<td>Passport/VISA Fees</td>
<td>Miscellaneous</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Taxi, Bus, Uber, etc.</td>
<td></td>
<td></td>
<td>Registration Fees</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tolls/Road Charges</td>
<td></td>
<td></td>
<td>Subscriptions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Train</td>
<td></td>
<td></td>
<td>Tips/Gratuites</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Training/Seminars</td>
</tr>
<tr>
<td>02. Transportation</td>
<td>Airfare</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Airline Fees</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Car Rental</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fuel Charges - Rental Car Only</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix F

Missing Receipt Affidavit

Step 1 - How to Navigate

Step 2 - Select Transaction

Step 3 - Final Confirmation
Appendix G

Approval Flow

**Step 1 - How to Navigate**

**Step 2 – Approval Flow expanded showing an Expense Report with Multiple Region ERP’s**

*Please note: You can only see the approval flow after the report has been submitted*
Appendix H

Delegates

**Step 1 - How to Navigate**
Profile > Profile Settings > Expense Delegates

**Step 2 – How to Add Delegate**
Click Add > Type in Users Name > Select the Desired Check Boxes > Save
Appendix I

Region & Section
Treasurer’s Role

- Become Familiar with the Expense Report Purposes (ERP’s) for your Region/Section
- Roll out the Demo & Training Video to all Volunteers who will submit an expense report
- Become a Subject Matter Expert (SME) on how to Create & Approve Concur Expense Reports for your Region/Section
How to Access Concur

- **Always access with your IEEE credentials via [ieee.org/concur](https://ieee.org/concur).**
  - Never attempt to access Concur directly through [concur.com](http://concur.com).

**Getting Started**
- You need an IEEE Account (IEEE username/password) -- hit blue [Request button](https://request-button) if needed
- Log into your IEEE account with your IEEE username and password, and request to [have a Concur account created for you](https://have-a-account).

**Access**
- Click the orange “[Log In](https://log-in)” button for direct access to Concur

**Experience the benefits of the [mobile app](https://mobile-app):**
- Submit your reports anytime, anywhere

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The remaining slides are for reference purposes only.

*If you have any questions, please send an email to: [concurfeedback@ieee.org](mailto:concurfeedback@ieee.org)*
Appendix J

Expense Report Dashboard – Upload Receipts

Available Receipts

Upload New Receipt
Click here or drag & drop files to upload new receipt images.

Cassingham 12-03-2021 Austin trip (4Q0644).pdf

Enable Expense Assistant and these expenses will be placed on a report for you. Learn More
Appendix J

Start an Expense Report

- Review status of Expense Reports in Progress
- Upload Receipts without starting a report
- Start a Report
Appendix J

Expense Report Header – R5 Example

Fields with red vertical lines are required and must be populated

Create a New Expense Report

Report Header

- **Report Name**: 2022 Region 5 Annual Meeting
- **Report Date**: 03/05/2022
- **Comment**: Attend Region 5 Annual Meeting in Houston, April 8-10, 2022

Expense Report Purpose Levels:
- **Level 1**: Regions
- **Level 2**: Southwestern USA - Region
- **Level 3**: (R5) Southwestern USA - Re
- **Level 4**: (5,20,000) 000 Travel Expenses
Airfare Receipt Date = Transaction Date – R5 Example
Airfare Completed Line-Item – R5 Example
Airline Receipt Image – R5 Example

2021 Fall R5 EXCOM

Airport: Southwest Airlines
Date: 11/08/2021
Amount: $307.96
Requested: $307.96

Payment Information

Total Cost:
- Air - 4QO64H: $259.68
- U.S. Transportation Tax: $19.48
- U.S. 9/11 Security Fee: $11.20
- U.S. Flight Segment Tax: $8.60
- U.S. Passenger Facility Chg: $9.00
- Total: $307.96

Payment:
- Visa ending in 9701
- Date: November 8, 2021
- Payment Amount: $307.96

Fare Rules: If you decide to make a change to your current itinerary, it may result in a fare increase. If you are left with travel funds from this confirmation number, you're in luck! We're happy to let you use them towards a future flight for the individual named on the ticket, as long as the new travel is completed by the expiration date.

Your ticket number: 526140458855
Start Mileage Expense by selecting Personal Car Mileage from Recently Used or All Expense Types.
First step is to access the Mileage Calculator.

Concur will populate the Waypoints and Mileage on this tab when the route is saved in the calculator.
Mileage Calculator – R5 Example

**ACTIONS:**

- Enter Waypoints (2 or more as appropriate for the claim)
- **DO NOT CLICK PERSONAL**
- Round Trip Option
- Select “Add Mileage to Expense” to return to the Expense Tab
Waypoints and Distance/Amount carried over from Mileage Calculator
When satisfied with the entry, select SAVE and the expense will be added to the report.
### Adjusting Line-Item Expense Code

#### New Expense

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Transaction Date</th>
<th>Ticket Number</th>
<th>From Airport</th>
<th>Payment Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td>11/08/2021</td>
<td></td>
<td>(USY) New Orleans, La, USA</td>
<td>Out of Pocket</td>
<td>USD</td>
</tr>
<tr>
<td>To Airport</td>
<td>12/03/2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Austin-Bergstrom Airport, USA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airline Travel Service Code</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coach Class</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City of Purchase</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Available Receipts

- **Receipt Status:** Receipt
- **Comment:**
- **Expense Report Purpose Level 1:** Regions
- **Expense Report Purpose Level 2:** Southwestern USA - Region
- **Expense Report Purpose Level 3:** (R5) Southwestern USA - Regions
- **Expense Report Purpose Level 4:** 20,000,000 Travel Expense

#### Type to search by:

- **Text**
- **Code**
- **Text**

- 20,000,000 Publications
- 50,000,000 Salaries
- 51,000,000 Sections Congress
- 48,000,000 Student Activities
- 63,100,000 Student Branch,不同程度
- 56,000,000 Support to Sections/Chapters
- 52,000,000 Support-Region (Council)
- 20,000,000 Travel Expense
Expense Report Dashboard – Open Report

Hello, Paul

MY TRIPS (0)

You currently have no upcoming trips.

ALERTS

As an IEEE employee, you are eligible for a free TripIt Pro subscription.

COMPANY NOTES

IEEE NEXTGEN NEWS - WELCOME TO NEXTGEN EXPENSE REIMBURSEMENT (CONCUR)

Please Note: any reports that were not fully processed prior to May 1, 2021 will need to be deleted, recreated and submitted. Users will receive an error message if they attempt to submit a report that was created or saved prior to the NextGen configuration updates.

If you receive an error message, you can use the "move" command from within the expense entry screen and move all line items to a new report, then delete the original report.

If you have any questions or concerns, please send an email to: NextGenExpense@ieee.org

MY TASKS

- Required Approvals
  - Great! You currently have no approvals.
  - 00

- Available Expenses
  - You currently have no available expenses.
  - 00

- Open Reports
  - 01
  - 12/05 2021 Fall R5 EXCOM
  - $307.96
Questions

Please send all questions, comments, feedback and suggestions to:
concurfeedback@ieee.org