



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 iee.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)*

Concur Access

Step 1: How to Get Started

Request an IEEE Account
(Skip if you have one)

Create Concur Account

Step 2: Access Concur

Log In
(May require IEEE Network login)

Step 3:

Download the App

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 iee.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

Receipt for confirmation number OWYK6C

[United logo link to home page](#)

Issue Date: January 15, 2019 Confirmation: OWYK6C

[Check-In >](#)

TRAVELER INFORMATION

Traveler	eTicket Number	Frequent FlyerNumber	Seats
[REDACTED]	0162433945614		---

FLIGHT INFORMATION

Day, Date	Flight Class	Departure City and Time	Arrival City and Time	Aircraft	Meal
Wed, 13FEB19	UA1890N	NEWARK, NJ (EWR - LIBERTY) 11:25 AM	TAMPA/ST. PETERSBURG, FL (TPA) 2:21 PM	737-800	Purchase
Sat, 16FEB19	UA259 N	TAMPA/ST. PETERSBURG, FL (TPA) 9:55 AM	NEWARK, NJ (EWR - LIBERTY) 12:31 PM	A-320	Purchase

FARE INFORMATION

Fare Breakdown

Airfare:

203.72U
S
D

Form of Payment:
VISA
Last Four Digits
[REDACTED]

Expense

Expense Type Airfare	Transaction Date 01/15/2019	Ticket Number	From Airport (EWR) New York - Newark, NJ, U
To Airport (TPA) Tampa - International, FL, I	From Date 02/13/2019	To Date 02/16/2019	Vendor United Airlines
Airline Travel Service Code Coach Class	City of Purchase	Payment Type Out of Pocket	Amount 203.72 USD
<input type="checkbox"/> Personal Expense (do not reimburse) Comment			
Expense Report Purpose Level 1 Regions	Expense Report Purpose Level 2 Region 6 Western USA	Expense Report Purpose Level 3 OpCom Meeting	Expense Report Purpose Level 4 (N/A) Region 6 OpCom Meet
Entity (40) Regions & Sections	Business Unit (5050) Geographical Units	Cost Center (50506) Region-6	CB Account # 600000 (Region 6 Western USA)

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](https://www.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

Concur Account Log In

Concur Home Page on [ieee.org/concur](https://www.ieee.org/concur) (no username/password required)

The screenshot shows the IEEE Corporate Activities website. The browser address bar displays corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report. The main navigation bar includes links for Home, IEEE Board, Committees of IEEE, Strategic Research, Resources, Finance, Legal, Contacts & Rosters, and News. A breadcrumb trail reads: Home / Resources / Travel, Medical and Insurance / IEEE Expense Report. The left sidebar lists various resources, with 'Travel, Medical and Insurance' selected. The main content area is titled 'IEEE Expense Report' and features a sub-header 'NextGen Expense Reimbursement - Concur'. A text block explains that the Concur tool is an automated platform for reimbursement, designed to be fast, easy, and efficient. It notes that IEEE volunteers will save time with a streamlined experience, and that the tool is directly reimbursing users. It also mentions that the tool was endorsed by the IEEE Financial Committee (FinCom) and officially launched in February 2019. Below this, a section titled 'IEEE Sections and Standards Working Group -- Concur Availability Fall 2020' contains an 'Important:' notice: 'The NextGen Expense Reimbursement tool uses a single sign-on process for logging in through [ieee.org/concur](https://www.ieee.org/concur), not concur.com. All users will need an IEEE account (IEEE username and password) to access the platform.' To the right of this notice is a 'Concur Access' box with three steps: Step 1: How to Get Started, with buttons for 'Request an IEEE Account (Skip if you have one)' and 'Create Concur Account'; Step 2: Access Concur, with a 'Log In (May require IEEE Network login)' button; and Step 3: 'Download the App' button. At the bottom, a 'Concur Checklist' section is partially visible, with the text 'Do you need assistance? Refer to this checklist (PDF, 569KB) for help.'

corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report

IEEE Corporate Activities



- Home
- IEEE Board
- Committees of IEEE
- Strategic Research
- Resources
- Finance
- Legal
- Contacts & Rosters
- News

/ Home / Resources / Travel, Medical and Insurance / IEEE Expense Report

Volunteer Training

Travel, Medical and Insurance

Meeting Procedures and Best Practices

IEEE Governing Documents

Document Revisions

Summary of the IEEE Organization

IEEE Contact Center

IEEE Foundation

IEEE Expense Report

NextGen Expense Reimbursement - Concur

The NextGen Expense Reimbursement tool, Concur, is an automated platform that is designed to be fast, easy, and efficient. IEEE volunteers will save time with a streamlined experience, with IEEE directly reimbursing you. Plus, you can use the [mobile app](#) for easy on-the-go expense reporting. This new platform was endorsed by the IEEE Financial Committee (FinCom) and officially launched in February 2019.

IEEE Sections and Standards Working Group -- Concur Availability Fall 2020

Important:

The NextGen Expense Reimbursement tool uses a single sign-on process for logging in through [ieee.org/concur](https://www.ieee.org/concur), not concur.com.

All users will need an IEEE account (IEEE username and password) to access the platform.

Concur Access

Step 1: How to Get Started

Request an IEEE Account
(Skip if you have one)

Create Concur Account

Step 2: Access Concur

Log In
(May require IEEE Network login)

Step 3:

Download the App

Concur Checklist

Do you need assistance? Refer to this checklist (PDF, 569KB) for help.

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.chandanala@ieee.org>

Dear Arnar Vidarsson,

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.

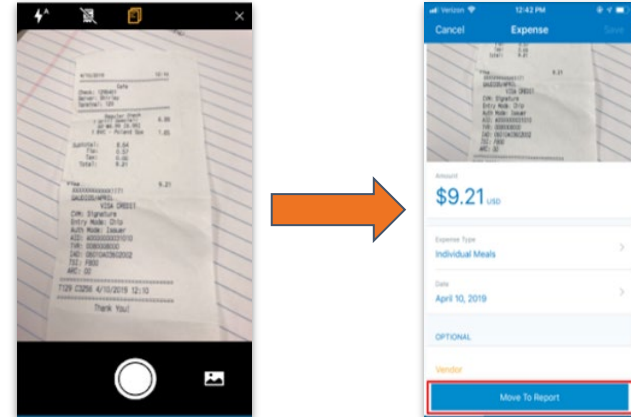
Appendix C

Mobile App – Access Anytime, Anywhere

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

The image shows two screenshots of the SAP Concur mobile app login interface. The first screenshot on the left shows the 'Sign in to Concur' screen with a 'Work Email or Username' field, a 'Next' button, and a 'Forgot Password?' link. An orange arrow points to the second screenshot on the right, which shows the 'Sign in with SSO' screen. This screen has the SSO passcode 'EDDB6G' entered in the field, a 'Sign in with SSO' button, and a note: 'Use SSO if your company has issued an SSO company code.' A back arrow is visible at the top left of the second screenshot.

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



Appendix D

Tiered Expense Report Purpose (ERP) Levels

Create a New Expense Report

Report Header

Report Name <input type="text"/>	Report Date <input type="text" value="10/17/2019"/>	Comment <input type="text"/>	
Expense Report Purpose Level 1 <input type="text"/>	Expense Report Purpose Level 2 <input type="text"/>	Expense Report Purpose Level 3 <input type="text"/>	Expense Report Purpose Level 4 <input type="text"/>

Section Example

Report Name <input type="text" value="MGA Geo Unit Treasurer Workshop"/>	Report Date <input type="text" value="08/06/2020"/>	Comment <input type="text"/>	
Expense Report Purpose Level 1 1 Sections	Expense Report Purpose Level 2 2 Region 9 Sections	Expense Report Purpose Level 3 3 Mexican Council	Expense Report Purpose Level 4 4 N/A

Region Example

Report Name <input type="text" value="MGA Treasurer Workshop"/>	Report Date <input type="text" value="08/06/2020"/>	Comment <input type="text"/>	
Expense Report Purpose Level 1 1 Regions	Expense Report Purpose Level 2 2 Region 2 Eastern USA	Expense Report Purpose Level 3 3 Region 2 Meeting	Expense Report Purpose Level 4 4 4.10 Annual Region Meeting

Appendix E

Expense Types

All Expense Types

01. Travel Expenses

Hotel

Laundry

02. Transportation

Airfare

Airline Fees

Car Rental

Fuel Charges - Rental Car Only

...02. Transportation

Parking

Personal Car Mileage

Taxi, Bus, Uber, etc.

Tolls/Road Charges

Train

03. Meals

Individual Meals (Food/Beverage)

...03. Meals

Meals with Guests

04. Office Expenses

Office Supplies

Postage

Shipping/Printing/etc.

06. Communications

Phone/Internet/Online Fees

07. Fees

Agency Booking Fees

Currency Exchange Fees

Passport/VISA Fees

08. Other

Computer Hardware < \$1,000

Computer Software < \$1,000

Dues/Membership

...08. Other

Marketing/Promotional Materials

Miscellaneous

Registration Fees

Subscriptions

Tips/Gratuities

Training/Seminars

Appendix F

Missing Receipt Affidavit

Step 1 - How to Navigate

The screenshot shows the 'Expenses' section of a software interface. At the top, there are buttons for '+ New Expense', 'Import Expenses', 'Details', 'Receipts', and 'Print / Email'. Below these is a table with columns for 'Date' and 'Expense Type'. One row is highlighted with a blue background, showing '10/01/2019' and 'Parking'. A dropdown menu is open under the 'Receipts' button, listing several options: 'Receipts Required', 'Check Receipts', 'Attach Receipt Images', 'View Available Receipts', and 'Missing Receipt Affidavit'. The 'Missing Receipt Affidavit' option is highlighted in yellow.

Step 2 - Select Transaction

The screenshot shows a dialog box titled 'Missing Receipt Affidavit'. It contains a table with columns for 'Expense Type', 'Date', and 'Amount'. One row is selected, showing 'Parking', '10/01/2019', and '\$45.00'. Below the table is a text field for 'Acceptance: I certify that I lost my receipt and this is a valid business expense.' At the bottom right, there are two buttons: 'Accept & Create' and 'Cancel'. The 'Accept & Create' button is highlighted with a red circle.

Step 3 - Final Confirmation

Missing Receipt Affidavit - Parking

Date of Expense: 10/01/2019
Amount: \$45.00
Business Reason: Test Report

Acceptance: I certify that I lost my receipt and this is a valid business expense.

Elyn Perez
10/17/2019
8:02 PM Greenwich Mean Time

Appendix G

Approval Flow

Step 1 - How to Navigate

The screenshot shows a software interface with a top navigation bar containing 'Summary', 'Details', 'Receipts', and 'Print / Email'. Below this is a table of expenses with columns for 'Date' and 'Expenses'. A dropdown menu is open under 'Details', listing options: 'Report', 'Report Header', 'Totals', 'Audit Trail', 'Approval Flow', 'Comments', 'Allocations', and 'Allocations'. The 'Approval Flow' option is highlighted in yellow.

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

The screenshot shows a window titled 'Approval Flow for Report: Mary - Test Vol 7 - Multiple Reg'. It displays two expense reports with their respective approval flows:

- Region 3 SoutheastCon Awardee Travel 4.85.300 (Regions-Region 3 Southeastern USA-SoutheastCon Awardee Travel-4.85.300)**
 - Approver: Perez, Elyn
 - Approval Date: (09/12/2019 Approved)
- Region 8 800: Secretary - 801: Administrative Support (Regions-Region 8 EMEA-800: Secretary-801: Administrative Support)**
 - Approver: Ringle, David
 - Approval Date: (09/06/2019 Approved)

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

Delegates

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

The screenshot shows the 'Profile Options' section of a user interface. The 'Expense Delegates' option is highlighted in yellow. Below it, a description states: 'Delegates are employees who are allowed to perform work on behalf of other employees.' Other options include 'Personal Information', 'Change Password', 'System Settings', and 'Expense Preferences'. A sidebar on the right shows the user's name 'Mary A Murray' and a 'Profile Settings' link.

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

The screenshot shows the 'Expense Delegates' table. The 'Add' button is highlighted in yellow. The table has columns for 'Name', 'Can Prepare', 'Can Submit Reports', 'Can View Receipts', 'Receives Emails', 'Can Approve', 'Can Approve Temporary', 'Can Preview For Approver', and 'Receives Approval Emails'. The first row, for 'Plank, Joseph', is highlighted in light blue. A red oval highlights the 'Can Prepare', 'Can Submit Reports', 'Can View Receipts', 'Receives Emails', 'Can Approve', and 'Can Approve Temporary' columns.

Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
Plank, Joseph j.t.plank@discard.mail.us2.cloud.oracle.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 iee.org/concur.**
 - *Never attempt to access Concur directly through concur.com.*
- **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](#).
- **Access**
 - Click the orange “[Log In](#)” button for direct access to Concur
- **Experience the benefits of the [mobile app](#):**
 - Submit your reports anytime, anywhere

The remaining slides are for reference purposes only.

*If you have any questions, please send an email to:
concurfeedback@ieee.org*

Concur Access

Step 1: How to Get Started

Request an IEEE Account
(Skip if you have one)

Create Concur Account

Step 2: Access Concur

Log In
(May require IEEE Network login)

Step 3:

Download the App

Expense Report Dashboard – Upload Receipts

The screenshot displays the SAP Concur Expense Report Dashboard. At the top, the SAP Concur logo is on the left, and navigation links for Travel, Expense, Approvals, and App Center are in the center. On the right, there are links for Support, Help, and a user profile dropdown. Below the navigation bar, the user is greeted with "Hello, Paul" and the IEEE logo. A row of action buttons includes "Start a Report", "Enter Reservation", "Upload Receipts" (highlighted with a red arrow), "Required Approvals", "Available Expenses", and "Open Reports". Below these buttons, a table header is visible with columns for Expense Item, Transaction Category, Source, Date, and Amount, and the text "All Clear" is centered. A light blue banner contains the message: "Enable Expense Assistant and these expenses will be placed on a report for you. [Learn More](#)". The "AVAILABLE RECEIPTS" section features a large "Upload New Receipt" button (highlighted with a red box) and a card for an existing receipt titled "Cassingham 12-03-2021 Austin trip (4QO64H).pdf" (highlighted with a red arrow). The receipt card shows a thumbnail of the PDF document and a "Delete" link.

Start an Expense Report

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

The screenshot shows the SAP Concur user interface. At the top left is the 'SAP Concur' logo. A navigation bar contains tabs for 'Travel', 'Expense', 'Approvals', and 'App Center'. On the right side of the navigation bar, there are links for 'Support | Help', a 'Profile' dropdown menu, and a user icon. Below the navigation bar is a dashboard area. On the left of the dashboard is the IEEE logo and the text 'Hello, Paul'. The dashboard contains several cards: a 'Start a Report' card with a plus sign icon, an 'Enter Reservation' card with a plus sign icon, an 'Upload Receipts' card with a plus sign icon, a 'Required Approvals' card with '00' and a bar chart icon, an 'Available Expenses' card with '00' and a bar chart icon, and an 'Open Reports' card with '00' and a bar chart icon. A red arrow points to the 'Start a Report' button.

Expense Report Header – R5 Example

Fields with red vertical lines are required and must be populated

SAP Concur 

Travel

Expense

Approvals

App Center

Manage Expenses

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 Level 1

1 Regions 


Expense Report Purpose Level 2

2 Southwestern USA - Region 

Expense Report Purpose Level 3

3 (R5) Southwestern USA - Re 

Expense Report Purpose Level 4

4 (5.20.000) 000 Travel Expen 

Airfare Receipt Date = Transaction Date – R5 Example

New Expense

Expense Type: Airfare

Ticket Number:

To Airport: Austin-Bergstrom Airport, USA

To Date: 12/05/2021

Airline Travel Service Code: Coach Class

Payment Type: Out of Pocket

Receipt Status: Receipt

Transaction Date: 11/08/2021

From Airport: (MSY) New Orleans, La, USA

From Date: 12/03/2021

Vendor: Southwest Airlines

City of Purchase:

Amount: | USD

Personal Expense (do not reimburse)

Comment:

Available Receipts Gallery

Southwest Airlines.pdf
Received 11/30/2021 09:40 AM

← Previous | 2 of 4 | Next →

Payment Information

Total cost		Payment
Air - 4Q064H		Visa ending in 9701
Base Fare	\$ 250.88	Date: November 8, 2021
U.S. Transportation Tax	\$ 19.48	Payment Amount: \$307.96
U.S. 9/11 Security Fee	\$ 11.20	
U.S. Flight Segment Tax	\$ 8.00	
U.S. Passenger Facility Chg	\$ 9.00	
Total	\$ 307.96	


Fare Rules: You may decide to make a change to your current itinerary. It may result in a fare increase. In the case you're left with travel funds on 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: 5261450468055

Prepare for takeoff

For a touch-free day of travel download the Southwest® app.

Download app now (Apple) | Download app now (Android)



Airfare Completed Line-Item – R5 Example

Manage Expenses

2021 Fall R5 EXCOM

Delete Report [Submit Report](#)

[+ New Expense](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print / Email](#)


Expenses

[Move](#) [Delete](#) [Copy](#) [View](#)

<input checked="" type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	11/08/2021	Airfare Southwest Airlines	\$307.96	\$307.96

Expense [Receipt Image](#)

Available Receipts



Expense Type: Airfare
Transaction Date: 11/08/2021
Ticket Number:
From Airport: (MSY) New Orleans, La, USA

To Airport: (AUS) Austin, TX - Austin-Bergstr
From Date: 12/03/2021
To Date: 12/05/2021
Vendor: Southwest Airlines

Airline Travel Service Code: Coach Class
City of Purchase:
Payment Type: Out of Pocket
Amount: 307.96 USD

Receipt Status: Receipt Personal Expense (do not reimburse)
Comment:

Expense Report Purpose Level 1: 1 Regions
Expense Report Purpose Level 2: 2 Southwestern USA - Region
Expense Report Purpose Level 3: 3 (R5) Southwestern USA - Re
Expense Report Purpose Level 4: 4 (5.20.000) 000 Travel Expen

Entity:
Operating Unit:
Product:
Cost Center:

CB Account #: 500000 (Southwestern USA - Regic)

Airline Receipt Image – R5 Example

SAP Concur
Support | Help

Travel
Expense
Approvals
App Center
Profile

Manage Expenses

2021 Fall R5 EXCOM

+ New Expense
Import Expenses
Details ▾
Receipts ▾
Print / Email ▾

	Date ▾	Expense Type	Amount	Requested	
<input checked="" type="checkbox"/>	11/08/2021	Airfare Southwest Airlines	\$307.96	\$307.96	

Move ▾
Delete
Copy
View ▾

Expense
Receipt Image

Available Receipts

2 of 4
Automatic Zoom ▾

Southwest Airlines

Austin
New Orleans

Payment information

Total cost		Payment	
Air - 4QO64H		Visa ending in 9701	
Base Fare	\$ 259.68	Date: November 8, 2021	
U.S. Transportation Tax	\$ 19.48	Payment Amount: \$307.96	
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		

Fare Rules: If you decide to make a change to your current itinerary it may result in a fare increase. In the case you're 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: 5261450468055



Mileage Expense – R5 Example

Mileage Sample

[+ New Expense](#) [Import Expenses](#) [Details ▾](#) [Receipts ▾](#) [Print / Email ▾](#)

Expenses

[Date ▾](#) [Expense Type](#) [Amount](#) [Requested](#)

[Adding New Expense](#)

TOTAL AMOUNT
\$0.00

TOTAL REQUESTED
\$0.00

Start Mileage Expense by selecting Personal Car Mileage from Recently Used or All Expense Types

[Delete Report](#)

[Submit Report](#)

New Expense

[Available Receipts](#)

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

✓ Recently Used Expense Types

Meals with Guests	Personal Car Mileage	Airfare
Parking	Hotel	

All Expense Types

01. Travel Expenses

- Hotel
- Laundry
- 02. Transportation**
- Airfare
- Airline Fees
- Car Rental
- Fuel Charges - Rental Car Only
- Parking
- Personal Car Mileage**
- Taxi, Bus, Uber, etc.
- Tolls/Road Charges
- Train
- 03. Meals**
- Individual Meals (Food/Beverage)

...03. Meals

- Meals with Guests
- 04. Office Expenses**
- Office Supplies
- Postage & Mailing
- Printing
- Shipping
- 05. Computer Expenses**
- Computer Hardware
- Computer Software
- 06. Communications**
- Phone/Internet/Online Fees
- 07. Other Travel**
- Agency Booking Fees

...07. Other Travel

- COVID Testing/Inoculations
- Currency Exchange Fees
- Passport/VISA Fees
- 08. Other**
- Dues/Membership
- Marketing/Promotional Materials/Advertising
- Miscellaneous
- Registration Fees
- Subscriptions
- Tips/Gratuities
- Training/Seminars

Mileage Calculator – R5 Example

New Expense Available Receipts

[View Reimbursement Rates](#)

Expense Type <input type="text" value="Personal Car Mileage"/>	Transaction Date <input type="text"/>	Purpose of the Trip <input type="text"/>	From Location <input type="text"/>
To Location <input type="text"/>	Payment Type <input type="text" value="Out of Pocket"/>	Distance - Amount <input type="text" value="0"/> <input type="text" value="00"/> USD	Receipt Status <input type="text" value="No Receipt"/>


Comment

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

Expense Report Purpose Level 1 <input type="text" value="Regions"/>	Expense Report Purpose Level 2 <input type="text" value="Southwestern USA - Region"/>	Expense Report Purpose Level 3 <input type="text" value="(R5) Southwestern USA - Re"/>	Expense Report Purpose Level 4 <input type="text" value="(5.20.000) 000 Travel Expen"/>
Entity <input type="text"/>	Operating Unit <input type="text"/>	Product <input type="text"/>	Cost Center <input type="text"/>

CB Account #

First step is to access the Mileage Calculator.

 [Mileage 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

Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

- Hoes Lane, Piscataway., NJ 08854, US 25.8 MI
- Newark Liberty International Airport (EV)

Personal

Calculate Route **Make Round Trip**

Directions

Suggested routes:

- I-287 S and I-95 N 25.8 mi. About 30 mins
- I-95 29.0 mi. About 34 mins
- Garden State Pkwy 29.3 mi. About 35 mins

A 445 Hoes Ln, Piscataway, NJ 08854, USA

25.8 mi. About 30 mins

- Head south toward Sidney Rd 253 ft
- Turn left onto Sidney Rd 0.7 mi
- Turn right to stay on Sidney Rd 0.2 mi
- Continue onto S Randolphville Rd 0.6 mi
- Take the ramp onto I-287 S 7.2 mi
- Take the exit onto I-95 N/NJ Turnpike exit 0.5 mi

TOTAL PERSONAL 0.0 MI **25.8 MI**

Map

Keyboard shortcuts Map data ©2022 Google Terms of Use

Add Mileage to Expense Cancel

Mileage Expense – R5 Example

New Expense Available Receipts

[View Reimbursement Rates](#)

Expense Type Personal Car Mileage	Transaction Date	Purpose of the Trip	From Location 445 Hoes Lane, Piscataway, NJ 08
To Location Newark Liberty International Airport	Payment Type Out of Pocket	Distance : Amount 26 : 15.21 USD	Receipt Status No Receipt


Comment

Waypoints and Distance/Amount carried over from Mileage Calculator

Expense Report Purpose Level 1 Regions	Expense Report Purpose Level 2 Southwestern USA - Region	Expense Report Purpose Level 3 (R5) Southwestern USA - Re	Expense Report Purpose Level 4 (5.20.000) 000 Travel Expen
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Entity	Operating Unit	Product	Cost Center
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CB Account #

 [Mileage Calculator](#)

[Save](#) [Attach Receipt](#) [Cancel](#)

Mileage Expense – R5 Example

Mileage Sample

Delete Report [Submit Report](#)

[+ New Expense](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses

[Move](#) [Delete](#) [Copy](#) [View](#)

<input checked="" type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	03/01/2022	Personal Car Mileage	\$15.21	\$15.21

Add Transaction Date and Purpose of the Trip.

[Available Receipts](#)

Expense

View Reimbursement Rates

Expense Type <input type="text" value="Personal Car Mileage"/>	Transaction Date <input type="text" value="03/01/2022"/>	Purpose of the Trip <input type="text" value="Travel to Airport"/>	From Location <input type="text" value="445 Hoes Lane, Piscataway, NJ 08"/>
To Location <input type="text" value="Newark Liberty International Airport"/>	Payment Type <input type="text" value="Out of Pocket"/>	Distance : Amount <input type="text" value="26"/> : <input type="text" value="15.21"/> <input type="text" value="USD"/>	Receipt Status <input type="text" value="No Receipt"/>
Comment <input type="text"/>			

Expense Report Purpose Level 1 <input type="text" value="Regions"/>	Expense Report Purpose Level 2 <input type="text" value="Southwestern USA - Region"/>	Expense Report Purpose Level 3 <input type="text" value="(R5) Southwestern USA - Re"/>	Expense Report Purpose Level 4 <input type="text" value="(5.20.000) 000 Travel Expn"/>
--	--	---	---

Entity <input type="text"/>	Operating Unit <input type="text"/>	Product <input type="text"/>	Cost Center <input type="text"/>
--------------------------------	--	---------------------------------	-------------------------------------

CB Account #

[Mileage Calculator](#)

When satisfied with the entry, select SAVE and the expense will be added to the report.

[Save](#) [Attach Receipt](#) [Cancel](#)

TOTAL AMOUNT
\$15.21

TOTAL REQUESTED
\$15.21



Adjusting Line-Item Expense Code

New Expense Available Receipts

Expense Type Airfare	Transaction Date 11/08/2021	Ticket Number	From Airport (MSY) New Orleans, La, USA
To Airport Austin-Bergstrom Airport, USA	From Date 12/03/2021	To Date 12/05/2021	Vendor Southwest Airlines
Airline Travel Service Code Coach Class	City of Purchase	Payment Type Out of Pocket	Amount USD
Receipt Status Receipt	<input type="checkbox"/> Personal Expense (do not reimburse) Comment		

Expense Report Purpose Level 1 1 Regions	Expense Report Purpose Level 2 2 Southwestern USA - Region	Expense Report Purpose Level 3 3 (R5) Southwestern USA - Re	Expense Report Purpose Level 4 4 (20,000) 000 Travel Expense
---	---	--	---

Entity	Operating Unit	Product
CB Account #		


Type to search by:

Text Code

(Code) Text

- (4.70.000) 000 Professional Activities
- (4.20.000) 000 Publications
- (5.30.000) 000 Salaries
- (5.15.000) 000 Sections Congress
- (4.80.000) 000 Student Activities
- (6.31.000) 000 Student Branch Rebate Disbursement
- (5.50.000) 000 Support to Sections/Chapters
- (5.52.000) 000 Support-Region (Council)
- (5.20.000) 000 Travel Expense

Expense Report Dashboard – Open Report



Hello, Paul

+ Start a Report + Enter Reservation + Upload Receipts 00 Required Approvals 00 Available Expenses 01 Open Reports

MY TRIPS (0) →
You currently have no upcoming trips.

ALERTS
As a IEEE employee, you are eligible for a free **Tript Pro** subscription. [Learn More and Activate](#) Not right now

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

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

00 Available Expenses →
You currently have no available expenses.

01 Open Reports →
12/05 **2021 Fall R5 EXCOM**
\$307.96

[Read more](#)

Questions



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