



Content

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What is Concur?

- The IEEE Volunteer Expense Reimbursement tool, cloud based, paperless
- Direct reimbursement from IEEE CB account to your account or using Western Union
- Runs both in browsers (PC) and as an app on smart phones
- Main website:
<https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report>

How does it work?

1. You: upload or scan the receipts
You: create a report (claim) and specify its “purpose”
2. You: submit the report
3. The first Approver receives notification about the report
4. The Approver checks the report and the receipts
5. If all is correct, the report goes to the next Approver
If it is last Approver, the payment is processed
6. If there are questions, the Approver sends you comments

Note: in Region 8 we have maximum two Approvers

Three Steps to Access Concur

Step 1: How to Get Started

Request an IEEE Account
(Skip if you have one)

Bank account details needed

Create Concur Account

Direct payment in EUR for most EU countries

For the remaining countries, registration with Western Union

Step 2: Access Concur

Log In
(May require IEEE Network login)

Transaction costs covered by IEEE

Step 3:

Download the App

Expense Report Purpose (ERP) – hierarchical system

Determines the budget from which expense will be paid and who will approve it

Create a New Expense Claim

Claim Header

Report Name

Report Date

10/12/2019



Comment

Expense Report Purpose Level 1

1

Expense Report Purpose Level 2

2

Expense Report Purpose Level 3

3

Expense Report Purpose Level 4

4

Type to search by:

☒ Text ☐ Code

(Code) Text

Corporate Activities

Educational Activities

Finance & HR

IEEE Foundation

IEEE-USA

Marketing Sales & Design (MSD)

Member & Geo. Activities (MGA)

Publications

Regions

Expense Report Purpose – Region 8

Create a New Expense Claim

Claim Header

Report Name	Report Date	Comment	
<input type="text"/>	<input type="text" value="10/12/2019"/>	<input type="text"/>	

Expense Report Purpose Level 1	Expense Report Purpose Level 2	Expense Report Purpose Level 3	Expense Report Purpose Level 4
1 Regions	2 Region 8 EMEA	3	4

Type to search by:

☒ Text ☐ Code

(Code) Text

- Region 1 Northeast USA
- Region 10 Asia & Pacific
- Region 2 Eastern USA
- Region 3 Southeastern USA
- Region 4 Central USA
- Region 5 Southwestern USA
- Region 6 Western USA
- Region 7 Canada
- Region 8 EMEA

Expense Report Purpose – main budget code group

Create a New Expense Claim

Claim Header

Report Name	Report Date	Comment	
<input type="text"/>	<input type="text" value="10/12/2019"/>	<input type="text"/>	

Expense Report Purpose Level 1	Expense Report Purpose Level 2	Expense Report Purpose Level 3	Expense Report Purpose Level 4
1 Regions	2 Region 8 EMEA	3 <input type="text"/>	4 <input type="text"/>

Type to search by:

☒ Text ☐ Code
(Code) Text

- 100: R8 Committee
- 100: R8 Committee Meeting
- 100: R8 OpCom Meetings
- 100: Sections Congress
- 100: SYP Congress
- 200: Director
- 300: Director Elect
- 400: Past-Director
- 500: Technical Activities

Expense Report Purpose – detailed budget code

Create a New Expense Claim

Claim Header

Report Name

Report Date

10/12/2019



Comment

Expense Report Purpose Level 1

1 Regions ▼

Expense Report Purpose Level 2

2 Region 8 EMEA ▼

Expense Report Purpose Level 3

3 100: R8 Committee Meeting ▼

Expense Report Purpose Level 4

4 ▼

Type to search by:

☒ Text ☐ Code

(Code) Text

102: Spring

104: Fall

Report Name and Comment

The screenshot shows the 'Create New Expense Claim' form. Three callout boxes with arrows point to specific fields: 'Meeting description' points to the 'Report Name' field, 'Your role' points to the 'Comment' field, and 'Budget code 104' points to the 'Expense Report Purpose Level 4' dropdown.

Meeting description

Your role

Budget code 104

Create New Expense Claim

Claim Header

Report Name	Report Date	Comment
113th Region 8 meeting Valencia	10/12/2019	Treasurer

Expense Report Purpose Level 1	Expense Report Purpose Level 2	Expense Report Purpose Level 3	Expense Report Purpose Level 4
1 Regions	2 Region 8 EMEA	3 100: R8 Committee Meeting	4 104: Fall

Note: the choice of codes is remembered in the mobile app

Adding Expenses to the Report

113th Region 8 meeting Valencia

[Delete Claim](#)[Submit Claim](#)

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

Expenses

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

<input type="checkbox"/>	Date ▾	Expense	Amount	Requested
Adding New Expense				

New Expense

[Available Receipts](#)

Expense

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.

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

...03. Meals

Meals with Guests

04. Office Expenses

Supplies/Postage/Shipping/Printing/etc.

06. Communications

Internet/Online Fees

07. Fees

Agency Booking Fees

Currency Exchange Fees

08. Other

Dues/Membership

Miscellaneous

Subscriptions

Tips/Gratuities

Training/Seminars

Helpful Hints & Most Frequent Issues

- ▶ The Expense Report Purpose (ERP) field drives the approval flow and account to charge
- ▶ All electronic payments processed through Concur will be made in the local currency based on the country of residence
- ▶ If your local currency is not USD, EUR, CAD or INR, you will need to create a Western Union profile for reimbursement (some Euro countries will also need Western Union account)
- ▶ When entering expenses in Concur, you must use the currency in which the transaction was incurred
- ▶ Transaction date on receipt must be entered in Concur
- ▶ Reports without required receipts for transactions over \$25 will be rejected (credit card statements are not valid receipts)

Training video from IEEE website

- <https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report/concur-training>

THANK YOU!



EURO Currency Countries

No highlight –direct payment from Concur

Highlight in red - payment processed through Western Union.

Pay Group	Currency Code	Country
Euro Volunteer Expense Pay	EUR	Austria
	EUR	Belgium
	EUR	Cyprus
	EUR	Estonia
	EUR	Finland
	EUR	France
	EUR	Germany
	EUR	Greece
	EUR	Ireland
	EUR	Italy
	EUR	Latvia
	EUR	Lithuania
	EUR	Luxembourg
	EUR	Malta
	EUR	Netherlands
	EUR	Portugal
	EUR	Slovakia
	EUR	Slovenia
	EUR	Spain

Expense Report Purpose – Technical Activities

Level 1	Level 2	Level 3 (max 32 characters)	Level 4 (max 32 characters)	Approver 1	Approver 2
Geo Unit - Region	Region 8	500: Technical Activities	501: TA Sub-Cttees Coord	Sohaib Sheikh	Adam Jastrzebski
Geo Unit - Region	Region 8	500: Technical Activities	502: R8 Conference Committee	Sohaib Sheikh	Adam Jastrzebski
Geo Unit - Region	Region 8	500: Technical Activities	503: Chapters Coordination	Sohaib Sheikh	Adam Jastrzebski
Geo Unit - Region	Region 8	500: Technical Activities	504: Prof & Ed Act	Sohaib Sheikh	Adam Jastrzebski
Geo Unit - Region	Region 8	500: Technical Activities	505: Standards Coordinator	Sohaib Sheikh	Adam Jastrzebski
Geo Unit - Region	Region 8	500: Technical Activities	506: Industrial Relations Initiatives	Sohaib Sheikh	Adam Jastrzebski
Geo Unit - Region	Region 8	500: Technical Activities	507: Projects and Initiatives	Sohaib Sheikh	Adam Jastrzebski
Geo Unit - Region	Region 9	500: Technical Activities	590: Other	Sohaib Sheikh	Adam Jastrzebski