

NextGen Expense Reimbursement (Concur)

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NextGen Expense Reimbursement (Concur) Introduction

➤ What is NextGen Expense Reimbursement?

- Cloud based expense management application, including electronic receipt integrations and secure mobile access



➤ Benefits of Using NextGen Expense

- Fully integrated with NextGen Finance (Projects) and NextGen Banking
 - Expense Tagging transactions (ERP level 4/WBS) happens automatically between Concur - Coupa
- The Concur Mobile app expands accessibility to create & approve expense reports anytime/anywhere
- Concur designed an updated UI for a better end user experience which was rolled out late September 2022

➤ When to Use NextGen Expense

- IEEE will reimburse for travel and non-travel related expenses such as office supplies, shipping, dues/membership, registration fees, etc.
 - For personal “Out of Pocket” and “IEEE Corporate Card” (if applicable) expenses

➤ When **Not** to Use NextGen Expense

- CB Card transactions do not get processed/entered in Concur
- Local bank account activity

NextGen Expense (Concur) Documentation

➤ ieeexplore.org/expense

➤ One stop shopping for NextGen Expense related documentation and training

- **How to Log in to Concur**
- **NextGen Expense Reimbursement Checklist**
 - View a checklist of items needed prior to creating your 1st expense report in addition to tips on submitting your report
- **Concur Mobile App**
 - View a comprehensive video on how to log into the mobile application on your cellular device
- **Training & Quick Reference**
 - Review self paced training or NextGen Expense Concur
 - View recorded training sessions from previous training events
- **Expense Report Purpose (ERP) Library**
- **Frequently Asked Questions (FAQs)**

ieeexplore.org/expense (sample screenshot)

IEEE Expense Report

NextGen Expense Reimbursement

View a recorded DEMO featuring Concur's New User Interface which launched on September 26, 2022.

Please note: the system's functionality did not change, however, you may notice some visual changes which we cover in the recording. Any questions, please send an email to: NextGenExpense@ieee.org

The NextGen Expense Reimbursement tool 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. NextGen Expense Reimbursement is part of the IEEE NextGen platform. [Learn more](#).

Important:

The NextGen Expense Reimbursement tool uses a single sign-on process for logging in through ieeexplore.org/expense, not concur.com.

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

NextGen Expense Reimbursement Checklist

Do you need assistance? Refer to this checklist (PDF, 233KB) for help

Download the App

[View comprehensive video](#) (How to log into the mobile app).

Create, submit, and approve expense reports anytime/anywhere with the [mobile app](#).

Training and Quick Reference

[View video tutorial](#) (self-paced training).

[Watch recorded training](#) for Sections & Standards Working Groups; see [PowerPoint slides and appendix](#).

[View Expense Report Purpose \(ERP\) library](#) (for selecting ERP, approver workflows, and GL coding).

[Exceptions Icons & Definitions - Travel & Expense](#)

[GST Requirements for Canadian Residents](#)

Need Help?

- For general questions, contact IEEE's project team at nextgenexpense@ieee.org.
- For technical assistance, contact [Concur's user support desk \(PDF\)](#).
- [Frequently asked questions](#)

✚ [Getting Started: Register/Account Login/Mobile App](#)

✚ [Using NextGen Expense Reimbursement](#)

✚ [Overview and Benefits of NextGen Expense Reimbursement](#)

✚ [Additional Resources](#)

[Print all Frequently Asked Questions \(PDF, 232KB\)](#).

Access

Step 1: How to Get Started

[Request an IEEE Account](#)
(Skip if you have one)

[Create Your Expense Reimbursement Account](#)

Step 2: Access

[Log In](#)
(May require IEEE Network login)

Step 3:

[Download the App](#)

Logging into NextGen Expense is as Easy as 1-2-3

Always access Concur with your IEEE credentials via ieee.org/expense. Never attempt to access Concur directly through concur.com

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 & password, then 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.

2. Access Concur

- Click the orange “[Log In](#)” button for direct access to Concur, a username/password are NOT required due to integration with Single Sign On (SSO)

3. Experience the benefits of the [mobile app](#):

- Submit your reports anytime, anywhere

Access

Step 1: How to Get Started

Request an IEEE Account
(Skip if you have one)

Create Your Expense
Reimbursement Account

Step 2: Access

Log In
(May require IEEE Network login)

Step 3:

Download the App

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

----- 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 Amar 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.

Western Union Sample Enrollment Email (all currencies except USD, CAD, EUR, INR, and JPY)

----- 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 Amar Hjartarson,

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 are required to complete a one-time enrollment with Western Union before you can begin receiving electronic reimbursements from IEEE. Please [click here](#) for the enrollment instructions.

IEEE has leveraged Western Union for all electronic payments in countries that Concur does not support directly. Please note you are responsible for maintaining your banking information with Western Union and making any updates when needed. If you need any assistance completing your Western Union registration, please contact Western Union by email at epayvendormangement@westernunion.com or by phone 1-800-815-2460 option 1.

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.

Mobile App – Access Anytime, Anywhere

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

SAP Concur

Sign in to Concur

Work Email or Username

Next

Forgot Password?

OR

SSO Company Code Sign In

→

SAP Concur

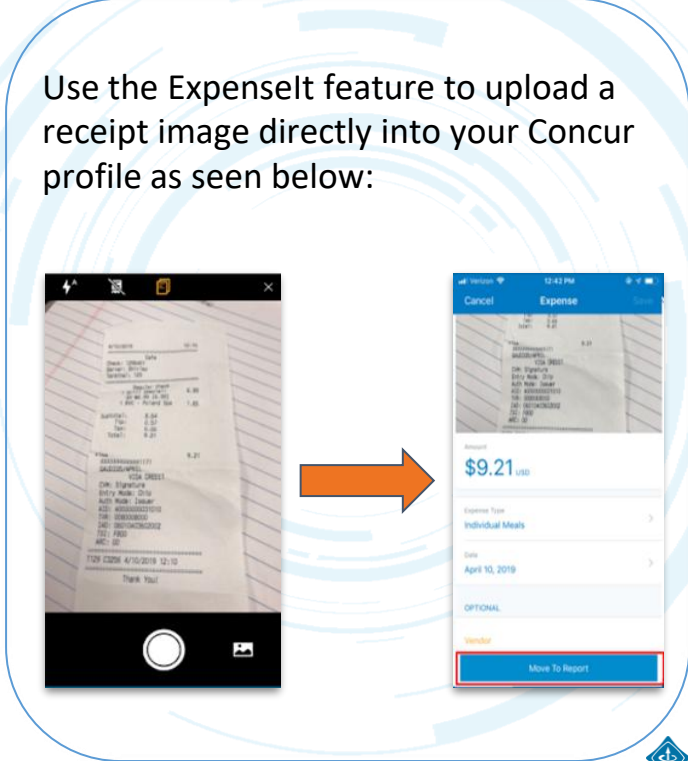
Sign in with SSO

EDDB6G

Sign in with SSO

Use SSO if your company has issued an SSO company code.

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



Expense Report Life Cycle

➤ Create Expense Report

- Volunteers/Members select 4-tiered Expense Report Purpose (ERP) Levels & Expense Type, which generates the:
 - Approvers
 - IEEE financial accounting and CB Account/HOP # for NextGen Banking
 - ERP Level 3 = Oracle PPM Project # and Project Name/Description
 - ERP Level 4 = Oracle PPM WBS Task # and Task Description

➤ Expense Report Processes through “Approval Flow”

- Approver(s) – Treasurer (at a minimum)
 - Best Practice is to have 2 Approvers per expense report purpose
 - *To change an Approver of an ERP, please send an email to: NextGenExpense@ieee.org*
 - The NextGen Expense team will make the system change and notify the Finance Solutions team via email
 - Following approvals, Concur audit and payment processing begins

➤ Report is Processed for Payment

- Payment is made electronically directly to your bank account via Concur or Western Union
- Standard Concur audit, IEEE review and payment processing typically takes **3-5 business days**

Concur & Western Union Payment Processing

➤ Concur or Western Union (aka Convera)?

- The reimbursement currency in your Concur profile is based on your Country of Residence. If you reside in a Country where the local currency is **USD, EUR, CAD, JPY or INR** you must enter your banking information directly into Concur.
- All other currencies require the user to enroll in **Western Union**, this is a one-time enrollment
 - *Additional benefit of Western Union is more flexibility to choose your bank (e.g. use your US bank even if your main country of residence is perhaps the UK)*
 - *Payment cannot be completed until banking information is provided*
 - **Western Union Contact Information:**
 - Phone: 1-800-815-2460, option # 1
 - Email: Vendormanagement@convera.com

➤ Security of Banking Information

- Personal information entered in the profile is secure and can only be managed by the user
- Concur and Western Union meet ISO, SSAE, and PCI Compliance standards, ensuring the utmost in security measures

Note: IEEE and Concur abide by OFAC regulations; in some cases, users may not be granted access to Concur

Payment Currencies Supported by Concur

EURO Countries Supported by Concur

Austria	Ireland
Belgium	Italy
Finland	Luxembourg
France	Netherlands
Germany	Portugal
Greece	Spain

in addition to USD, CAD, INR, and JPY
(otherwise, payment completed via Western Union)

Report Submitter Responsibilities

➤ Complete your Concur Profile

- Click Profile > Profile Settings. Personal information, verify email address, notification preferences & enter banking if required, etc.

➤ Submit Your Expenses for Reimbursement

- Submit your expenses for reimbursement within 60 days of being incurred, in accordance with the IEEE Travel & Expense Reimbursement Guidelines

➤ Expense reports should be consolidated as much as possible

- Multiple ERPs on a single report is permitted/encouraged – each transaction can utilize separate ERPs
- When possible, combine various trips and submit 1 expense report per month

➤ Delete/Remove any old expense reports in your Concur profile

Process change for our Canadian Residents – GST will need to be manually added on each expense line starting 1/2023

Concur “User” Profile

The screenshot shows the SAP Concur user interface. At the top, a navigation bar includes links for Travel, Expense, Approvals, Reporting, and App Center. On the right, there is a 'NextGen Help' link and a 'Profile' dropdown menu, which is circled in red. The dropdown menu is open, showing the user's name 'Mary Murray', a 'Profile Settings' link (circled in red), and a 'Sign Out' link. Below the user name, there is a section titled 'Acting as other user' with two radio button options: 'Act on behalf of another user' (selected) and 'Act as user in assigned group (Proxy)'. A search bar with the placeholder text 'Search by name or ID' and a magnifying glass icon is also present. Below the search bar are 'Cancel' and 'Start Session' buttons. The main content area is titled 'Profile Options' and lists various settings categories: Personal Information, Company Information, Credit Card Information, E-Receipt Activation, Travel Vacation Reassignment, Expense Delegates, Change Password, System Settings, Setup Travel Assistant, Travel Profile Options, Bank Information, Expense Preferences, and Concur Mobile Registration. The left sidebar contains a list of links under the 'Profile' heading, including 'Personal Information', 'Company Information', 'Email Addresses', 'Emergency Contact', 'Credit Cards', 'Travel Settings', 'Expense Settings', and 'Other Settings'. Several links in the sidebar are highlighted in yellow.

SAP Concur Travel Expense Approvals Reporting App Center NextGen Help **Profile**

Profile Personal Information Change Password System Settings Concur Mobile Registration Travel Vacation

Your Information

- Personal Information**
- Company Information
- Contact Information
- Email Addresses**
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Expense Settings

- Expense Information
- Bank Information**
- Expense Delegates**
- Expense Preferences**
- Expense Approvers
- Favorite Attendees

Other Settings

- E-Receipt Activation
- System Settings
- Concur Connect
- Change Password
- Travel Vacation Reassignment
- Concur Mobile Registration

Profile Options

Select one of the following to customize your user profile.

Personal Information
Your home address and emergency contact information.

Company Information
Your company name and business address or your remote location address.

Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.

Change Password
Change your password.

System Settings
Which time zone are you in? When does your workday start and end? When does your workday end?

Contact Information
How can we contact you about your account?

Setup Travel Assistant
You can allow other people to enter expenses for you.

Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.

Bank Information
Bank Information

Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Concur Mobile Registration
Set up access to Concur on your mobile device

Acting as other user

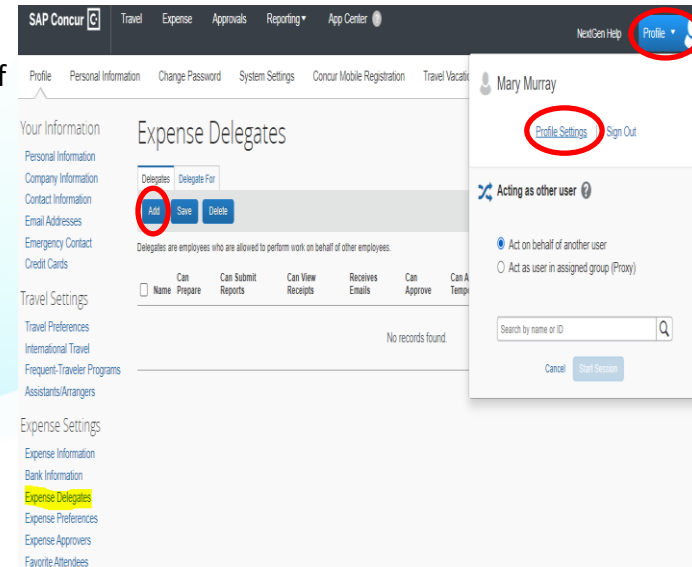
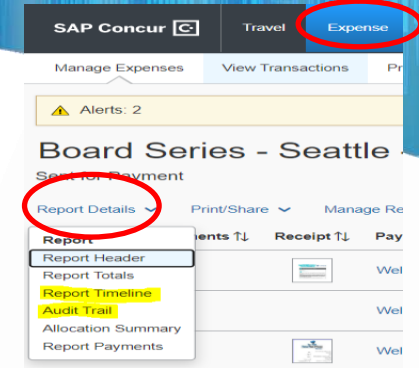
- ☒ Act on behalf of another user
- ☐ Act as user in assigned group (Proxy)

Search by name or ID

Cancel Start Session

Report Submitter “Self Service” Features

- **View the Status of your Expense Report (Approval Flow & Audit Trail)**
 - Real-time audit/status tracking visible to the submitter
 - To view the status of your expense report after it's submitted
 - *Report Details > Click on “Report Timeline” or “Audit Trail”*
- **Delegate Responsibility**
 - Users can designate a delegate to submit/approve expense reports on their behalf
 - A **missing receipt declaration** cannot be submitted by a delegate
 - A delegate cannot change profile information i.e., bank info, address, etc.
- **Receipt Options**
 - Email receipts to: receipts@expenseit.com, they will automatically upload into your Concur Profile (must verify email in Concur for this to work)
 - Integration with 3rd party applications (e.g., Uber, Lyft, etc.) which results in electronic receipt creation



Delegates

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

Expense Approvals App Center Profile

Profile Options

Select one of the following to customize your user profile.

- Personal Information
- Expense Delegates**
- Change Password

System Settings

Which time zone are you in? When does your workday start?

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Mary A Murray

Profile Settings | Sign Out

Acting as other user ?

Search by name or ID

Cancel Start Session

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

Expense Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

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"/>

Approver Responsibilities

- **Provide Demo & Training to all Volunteers/Users who will submit an expense report**
 - Coordinate any training within your Region/Section, etc.
 - Supporting documentation/training can be found on iee.org/expense
- **Become Familiar with the Expense Report Purposes (ERP's) for your Region/Section**
- **Maintain the approvers/approval flow of an ERP**
 - To make changes to Approver(s) in the system, send an email to: NextGenExpense@iee.org
 - ERP Level 4 (WBS Task) changes need to originate in PPM
- **View the expense reports that you have previously approved**
 - Click Approvals > Reports > View – select your report criteria
 - *Tip: if you do not see a report that you have approved listed in report view this means the expense report has been returned to submitter*

Approvers - View all Expense Reports You've Approved

- **View the expense reports that you have previously approved**
 - Click Approvals > Reports > View – select your report criteria
 - *Tip: if you do not see a report that you have approved listed in report view this means the expense report has been returned to submitter*

The screenshot displays the SAP Concur web application interface. At the top, a dark navigation bar contains the SAP Concur logo and several menu items: Travel, Expense, Approvals, Reporting, and App Center. The 'Approvals' menu item is circled in red. Below this bar, a breadcrumb trail shows 'Approvals Home' followed by 'Reports', which is also circled in red. The main content area is titled 'Expense Report List' and 'Reports Pending your Approval(0)'. A 'View' button with a dropdown arrow is circled in red. A dropdown menu is open below the 'View' button, listing various report filters: 'Reports Pending your Approval', 'Reports you Approved this Month', 'Reports you Approved last Month', 'Reports you Approved this Quarter', 'Reports you Approved last Quarter', 'Reports you Approved this Year', 'Reports you Approved last Year', and 'All Reports you Approved' (which is highlighted in yellow). To the right of the dropdown, there is a search bar with a 'Go' button and a table with columns for 'Report Name' and 'Comments'.



- **Always access Concur with your IEEE credentials via ieeexplore.org/expense**
 - For members that have access to the MNGE, you can always access Concur via the NextGen Dashboard (ieeexplore.org/nextgen)
- **Self Service Featuring NextGen Help Menu**
- **When Entering Transactions in a Foreign Currency**
 - Use the currency shown on the receipt, Concur automatically converts the transaction to user's local currency
 - 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
- **When Entering Expense Report Purposes (ERPs)**
 - If you're unsure which ERP to use, please contact your Region/Section Treasurer and/or your dedicated IEEE Staff Support Contact for assistance
- **Expenses must be recorded on the date the transaction occurred**
 - Receipt Date = Transaction Date
- **Reimbursements are made in user's local currency, per your country of residence**
 - If your currency is incorrect in your Concur profile and you have already updated your address within your IEEE member profile, please send an email to: NextGenExpense@ieee.org

My NextGen Experience “Dashboard”

Welcome to NextGen Kelli!

Welcome to your NextGen experience. Here, you can access your financial tasks and reports and stay up to date with the latest training.

My Top Activities

All your most common tasks at the touch of a button.

All Financial Expenses Contracts



Access Accounts



Make Conference Payments



Forecasting



Create & Manage Budgets



Upload External Costs & Revenue



Access 1099 Form



Access Grants & Awards Form



Create Expense Reports



View Expense Report Library



Upload Expense Receipts



Approve Expense Reports



My Contracts

IEEE
NextGen

- Log into NextGen Expense via the “**My NextGen Experience Dashboard**” or iee.org/nextgen
- User audience is limited (e.g. Treasurers and Chairs of the Geo Unit). Access is driven based on your vTools profile title.
- If you are having an issue with one of the NextGen Expense buttons going through the Dashboard, please log into Concur using the instructions in the previous slide and contact the **IEEE Contact Center** for further assistance.
- **IEEE Contact Center**
Email: contactcenter@ieee.org
Phone: +1 800 678 4333 (USA and Canada)
Phone: +1 732 981 0060 (Worldwide)

Currency Exchange Fee

Expense Type

SAP Concur

Manage Expenses View Transactions

Region Meeting

Not Submitted

Receipts Print/Share

Add Expense

Receipt Payment Type

Out of Pocket

0 Available Expense + Create New Expense

Search for an expense type

- 06. Communications
 - Phone/Internet/Online Fees
- 07. Other Travel
 - Agency Booking Fees
 - COVID Testing/Inoculations
 - Currency Exchange Fees
 - Passport/VISA Fees

Sample Expense Line **DO NOT** change Conversion Rate

Expense Type *
Parking

Transaction Date *
10/05/2022

Enter Vendor Name

Payment Type *
Out of Pocket

Business Purpose
concur table

City of Purchase

Amount *
33.24

Currency *
Euro

Conversion Rate *
1 EUR = 0.9910176328088

Amount in USD *
32.94

Reverse
USD

When Entering Transactions in a Foreign Currency

- Use the currency shown on the receipt, Concur automatically converts the transaction to user's local currency
- 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

Verify 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
	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	Form of Payment:
Airfare: 203.72USD 	VISA
	Last Four Digits

Expense Type *

Airfare

Transaction Date *

01/15/2019

Ticket Number

From Airport *

(EWR) New York - Newark, N...

To Airport *

(TPA) Tampa - International, F...

From Date *

02/13/2019

To Date *

02/16/2019

Vendor *

United Airlines

City of Purchase

Amount *

Receipt Status *

No Receipt

Expense Report Purpose Level 1 *

Regions

Expense Report Purpose Level 2 *

Eur. Mid. East Africa - Region 8

Expense Report Purpose Level 3 *

Eur. Mid. East Africa - Region ...

Expense Report Purpose Level 4 *

108 Stud&Young Prof.Congre...

Airline Travel Service Code *

Coach Class

Payment Type *

Out of Pocket

Currency *

Euro

☐ Personal Expense (do not reimburse)



NextGen Expense Reimbursement New User Interface

Expense Entry Line

- More room to work on your expense line
- Receipts are viewable while entering your expense

New ExpenseCancelSave Expense

DetailsItemizations

Expense Type *

Individual Meals (Food/Beverage)

Transaction Date *

MM/DD/YYYY

City of Purchase

Amount *

Receipt Status *

No Receipt

Expense Report Purpose Level 1 *

Regions

Expense Report Purpose Level 3 *

Canada - Region 7 (R7)

Enter Vendor Name

Payment Type *

Out of Pocket

Currency *

Pakistan, Rupee

☐ Personal Expense (do not reimburse)

Expense Report Purpose Level 2 *

Canada - Region 7

Expense Report Purpose Level 4 *

000 Chapter & Affinity Group ...

Upload Receipt Image

Tiered Expense Report Purpose (ERP) Levels

Report Header

Create New Report

Report Name *

Report Date *

Expense Report Purpose Level 1 *

Expense Report Purpose Level 2 *

Expense Report Purpose Level 3 *

Expense Report Purpose Level 4 *

Comment

Expense Report Purpose Level 1 *

- Text
- Code
- Either**

Expense Line Entry

Expense Type *

Transaction Date *

City of Purchase

Amount *

Receipt Status *

Expense Report Purpose Level 1 *

Expense Report Purpose Level 2 *

Expense Report Purpose Level 3 *

Expense Report Purpose Level 4 *

Enter Vendor Name

Payment Type *

Currency *

☐ Personal Expense (do not reimburse)

**ERP 3 = Oracle
PPM Project**

**ERP 4 = Oracle
PPM Task/WBS**

IEEE
NextGen

IEEE

Self Service Featuring “NextGen Help Menu”

Click on Menu to Expand

SAP Concur Expense Approvals App Center ? Profile Help

Hello, IEEE

+ Start a Report + Upload Receipts 03 Required Approvals 00 Available Expenses 09 Open Reports

COMPANY NOTES ?

Concur Training Toolkit
This link will provide information to utilise the Concur Expense System.

MY TASKS

03 Required Approvals ? →

Mary M. | Volunteer Test
USD 10.00 — Expense

Mary M. | Mary Murray
USD 20.00 — Expense

Mary M. | Mary Murray
USD 20.00 — Expense

00 Available Expenses ? →

You currently have no available expenses.

09 Open Reports ? →

04/12 Non CB - Non Project - Volunteer
CAD 5.00

04/08 Test Report for John Demo
USD 10.00 Returned

04/08 test
USD 5.00

04/08 Non CB - Non Project - Volunteer
USD 10.00



Expanded Menu (3 Sections)

How can we help you?

? Help ✓ Tasks

Type in your question...

My NextGen Experience

- Create Expense Report
- Upload Expense Receipts
- Approve Expense Report
- View Expense Report Library
- Welcome to WalkMe Tour

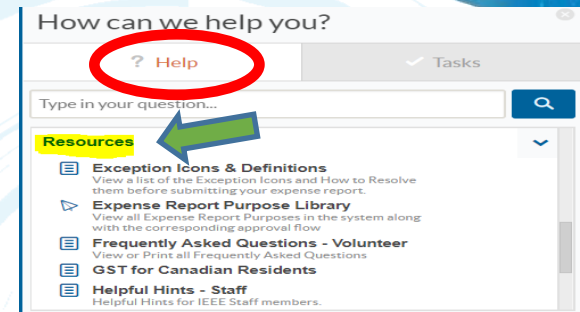
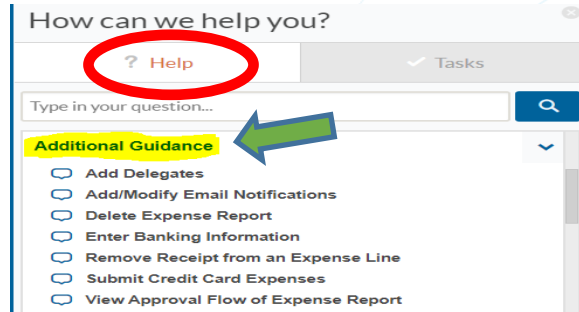
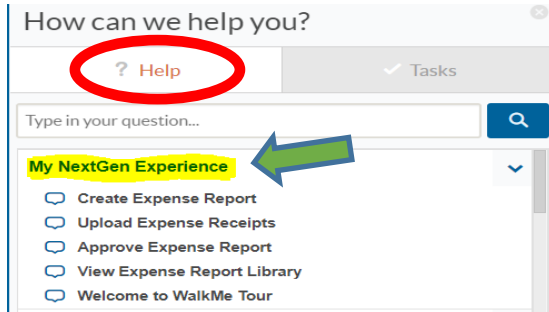
Additional Guidance

- Add Delegates

Assistance from NextGen Help (WalkMe)

- Walkthroughs (step-by-step guided learning)
- Smart Tips (helpful hints)

NextGen Help “Help Menu”



NextGen Help – Help Menu

- Consists of 3 Sections:
 - My NextGen Experience
 - Additional Guidance
 - Click on items listed to experience step-by-step guided learning
 - Resources
 - Click on items for additional documentation/information

NextGen Help “Tasks Menu”



How can we help you?

? Help

✓ Tasks

0% Completed

> **Verify Email Address**

If you do not verify your email address, you will not receive email notifications or any receipts that you have emailed to: receipts@expenseit.com



> **Enter Banking Information**

NextGen Help – Tasks Menu

- Suggested tasks to complete before using Concur
 - Verify Email Address
 - Needed for:
 - Email Notifications
 - Using receipts@expenseit.com
 - Enter Banking Information
 - Concur requirement if you are receiving your reimbursements via Concur

Report Library

- View your “Active Reports” for current status
- View your report history by changing the view to: This Year, Last Year, etc.

SAP Concur  Travel **Expense** Approvals Reporting ▾ App Center 

Manage Expenses View Transactions Process Reports

Manage Expenses

REPORT LIBRARY View: **Active Reports** ▾

+

Create New Report

✓ Active Reports

Sent for Payment (90 Days)

Last 90 Days



This Year

Last Year

Date Range

ing - New Jersey	10/13/2022	NOT SUBMITTED	09/20/2022
Boston Board Series Meeting		\$985.74	

Displayed reports: 2, Total: 2

SAP Concur  Travel **Expense** Approvals Reporting ▾ App Center  Administration ▾
NextGen Help Profile

Manage Expenses View Transactions Process Reports

Manage Expenses

REPORT LIBRARY View: **This Year** ▾

Create New Report

Active Reports

Sent for Payment (90 Days)

Last 90 Days

This Year

Last Year

Date Range

Report Name	Status	Report Date	Amount	Requested
Board Series - Seattle - June No: VRAQBS / ID: 0A73038169194	Sent for Payment	06/18/2022	\$181.08	\$181.08
Boston Board Series Meeting No: RUH0BG / ID: 42BFBD8E36724D71BE3A	Not Submitted	09/20/2022	\$985.74	\$985.74
Region Meeting - New Jersey No: WV06NZ / ID: 17F1787DCECE434C9D84	Not Submitted	10/13/2022	\$33.24	\$33.24

“What’s the Status of my Expense Report?”

Approval Flow/Report Timeline

Step 1 – Click on “Expense”

The screenshot shows the SAP Concur interface with the 'Expense' tab selected in the top navigation bar. Below the navigation bar, there are three tabs: 'Manage Expenses', 'View Transactions', and 'Process Reports'. The 'Manage Expenses' tab is active, displaying a 'REPORT LIBRARY' section. The 'View' dropdown is set to 'Active Reports'. There are two report cards visible: 'Region Meeting - New Jersey' with a status of 'NOT SUBMITTED' and a date of '10/13/2022', and 'Boston Board Series Meeting' with a status of 'NOT SUBMITTED' and a date of '09/20/2022'. The first report has a value of \$33.24 and the second has a value of \$28.39. A red box highlights the 'Create New Report' button. At the bottom, it says 'Displayed reports: 2, Total: 2'.

Step 2 – Change the “View” in Report Library

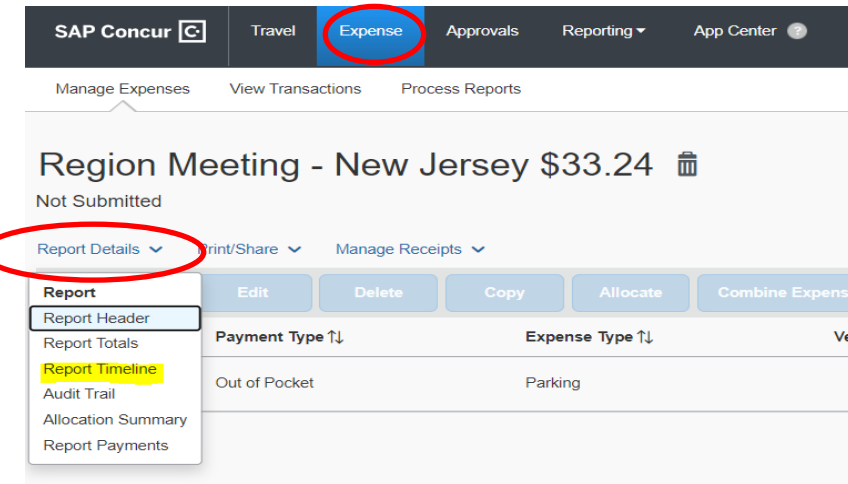
The screenshot shows the same SAP Concur interface as Step 1, but with the 'View' dropdown menu open. The dropdown menu shows options: 'Active Reports' (selected), 'Sent for Payment (90 Days)', 'Last 90 Days', 'This Year', 'Last Year', and 'Date Range'. The report cards are partially visible behind the dropdown. The first report is 'Region Meeting - New Jersey' and the second is 'Boston Board Series Meeting' with a value of \$985.74. A red box highlights the 'Create New Report' button. At the bottom, it says 'Displayed reports: 2, Total: 2'.

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

“What’s the Status of my Expense Report?” (cont.)

Approval Flow/Report Timeline

Step 3: Open Report, click on Report Timeline



SAP Concur

Travel **Expense** Approvals Reporting App Center

Manage Expenses View Transactions Process Reports

Region Meeting - New Jersey \$33.24

Not Submitted

Report Details Print/Share Manage Receipts

Report

Report Header

Report Totals

Report Timeline

Audit Trail

Allocation Summary

Report Payments

Edit Delete Copy Allocate Combine Expense

Payment Type Expense Type

Out of Pocket Parking

Step 4: Review Report Timeline to see Status



Report Timeline

Board Series - Seattle - June 22 | \$181.08

Approval Flow

Manager Approval
DeSimone, John D.

Concur Audit Service
Auditor1, Concur

Approval for Processing
NY, Mahalakshmi

Report Summary




REPORT COMMENT
Murray, Mary 06/18/2022
Traveled from 6/22 - 6/25 - Trip was cancelled due to weather

EXPENSE COMMENT Printing | 06/17/2022 | \$46.38 View
Murray, Mary 06/24/2022
Flyers for NextGen Table


EXPENSE COMMENT Agency Booking Fees | 05/03/2022 | \$15.00 View
Murray, Mary 06/24/2022
World Travel Fee

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




Combine Expense Reports using MOVE command


SAP Concur  Travel **Expense** Approvals Reporting App Center  NextGen Help Profile 







Manage Expenses View Transactions Process Reports

Region Meeting - New Jersey \$33.24 

Not Submitted

Report Details  Print/Share  Manage Receipts 

Add Expense Edit Delete Copy Allocate Combine Expenses **Move to **

<input checked="" type="checkbox"/>	Receipt 	Payment Type 	Expense Type 	Vendor	Date 	Requested 
<input checked="" type="checkbox"/>		Out of Pocket	Parking		10/05/2022	\$33.24
						\$33.24

TAB Meeting - December

Boston Board Series Meeting

New Report

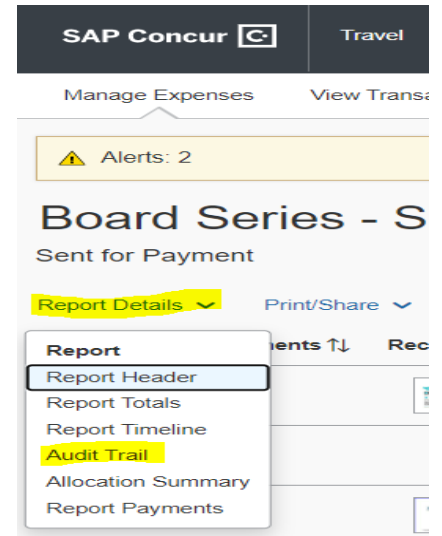
Available Expenses

How to “Move” an expense line to another expense report

1. Please check the expense line(s) that you would like to move
2. Click the blue “Move to” box
3. Select the report that you would like to move the expense(s) to: New Report, TAB Meeting – December or Boston Board Series Meeting

Audit Trail

Step 1 - How to Navigate



Step 2 – Click on Audit Trail

Audit Trail

Board Series - Seattle - June 22 | \$181.08

Report Level

Date/Time	Updated By	Action	Description
08/10/2022 2:24 AM	System, Concur	Queued for processing	The report was added to the Expense Pay processing queue.
08/05/2022 9:16 PM	DeSimone, John	Confirmation Agreement Acceptance	Approver Electronic Agreement
08/05/2022 5:21 PM	Murray, Mary	Confirmation Agreement Acceptance	User Electronic Agreement
08/05/2022 4:55 PM	Murray, Mary	Confirmation Agreement Acceptance	User Electronic Agreement
08/03/2022 5:22 PM	Murray, Mary	Receipt Images Deleted	Receipt images have been deleted
08/03/2022 5:18 PM	Murray, Mary	Receipt Images Deleted	Receipt images have been deleted

Entry Level

Date/Time	Updated By	Action	Description
08/10/2022 2:23 AM	NY,Mahalakshmi	Receipt Reviewed	Expense Type: Airfare; Date: 2022-05-03 Entry receipt reviewed.
08/10/2022 2:05 AM	NY,Mahalakshmi	Receipt Reviewed	Expense Type: Airfare; Date: 2022-05-03 Entry receipt reviewed.
08/10/2022 2:05 AM	NY,Mahalakshmi	Receipt Reviewed	Expense Type: Printing; Date: 2022-06-17 Entry receipt reviewed.
08/10/2022 2:05 AM	NY,Mahalakshmi	Receipt Reviewed	Expense Type: Taxi, Bus, Uber, etc.; Date: 2022-06-22 Entry receipt reviewed.

Please note: You can only see the audit trail after the report has been submitted

Missing Receipt Declaration

Step 1 - How to Navigate

Region Meeting - New Jersey \$33.24

Not Submitted

Report Details

Print/Share

Manage Receipts

Add Expense

Edit

Manage Attachments

Allocate

<input type="checkbox"/>	Alerts	Receipt	Payment type	Expense T
<input type="checkbox"/>			Out of Pocket	Parking

Step 2 - Select Transaction

Create Receipt Declaration

A receipt is required for this expense. If you are missing your receipt please use this missing receipt affidavit.
To create a Missing Receipt Declaration, select the expense(s) below that require a receipt.

<input checked="" type="checkbox"/>	Expense Type	Vendor	Date	Amount
<input checked="" type="checkbox"/>	Parking		10/05/2022	\$33.24

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

Cancel

Accept & Create

Step 3 - Final Confirmation

Missing Receipt Affidavit - Parking

Date of Expense: 10/05/2022

Amount: \$33.24

Business Reason: concur table

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

Mary Murray

10/19/2022

4:38 PM Greenwich Mean Time

Contact Information



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

(formally known as: concurfeedback@ieee.org)