

Frequently Asked Questions

Overview and Benefits of Concur

1. What is IEEE's new Volunteer Expense Reimbursement (Concur) platform?

IEEE's new Volunteer Expense Reimbursement tool, Concur, is an electronic, cloud-based expense reporting and reimbursement platform that's fast and efficient. Once implemented, IEEE volunteers will use this tool to submit expense reports for reimbursement rather than the current paper process.

2. Why did IEEE choose Concur?

Concur is a robust and user-friendly platform that will deliver a broad range of benefits to users, including:

- Faster reimbursement, due to elimination of the manual paper process and reduction in cycle time from expense report submission to reimbursement
- Integration with other online applications and improved receipt submission
- Ability to track in real time the status of expense reports including an email notification of expense report approval status
- Availability of a mobile app to support users on a smart device at any time
- Improved processing of international payments
- Improved overall reporting

3. Why is IEEE making this process change?

IEEE listened closely to the feedback of its volunteer community. Based on their requests for a more efficient expense reimbursement process that gives volunteers greater visibility to the status of their reimbursements, IEEE is making the change from a paper-based expense process to an electronic platform.

4. What will change from the current process when we move to the Concur process?

We are transitioning from a paper process to an electronic process. Instead of creating and submitting expense reports on paper, IEEE volunteers will be creating, submitting, reviewing, and/or approving expense reports electronically through Concur. Registration is now available; you can request access to the tool by using your IEEE Account (refer to details in Question #12).

5. Does this change in process benefit IEEE as well?

Yes. In addition to creating an easier and more efficient process for volunteers, the new platform will also deliver a range of benefits to IEEE. These benefits include:

- A more efficient and less manual process for reviewing, approving, and paying expense reports
- Enhanced reporting and data capture for more detailed and thorough analysis of expense reimbursements by IEEE

The new platform also supports IEEE's quality and compliance objectives with its simplified internal controls and audit capabilities to validate expenses.

6. What platform is IEEE's new Volunteer Expense Reimbursement tool on?

IEEE's new Volunteer Expense Reimbursement tool relies on the SAP Concur platform. This popular and well known platform provides robust travel and expense management services to many businesses and is endorsed by the IEEE's Finance Committee (FinCom).

User Impact and Rollout Schedule

7. Who is impacted?

Beginning in Q4 2018, Concur was initially rolled out to a pilot group of IEEE volunteers. Phases I and II for Society expenses and IEEE OU Governance-related expenses are complete.

For Phase III-A (Q3 2019 launch): If you currently submit your expense reports directly to your Section, Chapter, or Conference, please continue your current process. These types of expense reimbursements will move to Concur at a later phase. *For all other expenses, the preferred means to submit your expense reports is through Concur.*

For Phase III-B (Q1 2020 launch): If you currently submit your expense reports directly to your Chapter or Conference, please continue your current process. *For all other expenses, the preferred means to submit your expense reports is through Concur.* See multi-phase rollout schedule below.

8. What are the planned phases and timing of the implementation?

Beginning in Q4 2018, IEEE began rolling out the new Volunteer Expense Reimbursement tool (Concur) according to a five-phase process, to proceed as follows:

Tentative Rollout Schedule: IEEE's New Volunteer Expense Reimbursement (Concur)

Phase	Target Audience/Expenses	Estimated Rollout Timing (subject to change)
Phase I	Society expenses and IEEE OU Governance-related expenses (~50 pre-selected Volunteers)	completed Q4 2018
Phase II	<i>If you currently submit your expense reports directly to your Region, Section, Chapter, or Conference, please continue your current process. For all other expenses, the preferred means to submit your expense reports is through Concur.</i>	completed Q1 2019
Phase III-A	<i>If you currently submit your expense reports directly to your Section, Chapter, or Conference, please continue your current process. For all other expenses, the preferred means to submit your expense reports is through Concur.</i>	Q3 2019
Phase III-B	<i>If you currently submit your expense reports directly to your Chapter or Conference, please continue your current process. For all other expenses, the</i>	Q1 2020

	preferred means to submit your expense reports is through Concur.	
Phase IV	IEEE Professional Staff	TBD
Phase V	Conference related activity (All Volunteers)	TBD

9. What do I do if my expense reports aren't part of the current phase? How will I know when I will be impacted?

IEEE volunteers and staff members whose expense reports aren't part of the current phase will continue to submit their expense reports according to their current process (e.g., a paper expense report form). Please review the Phases in chart above.

10. My expenses have moved to Concur -- can I just keep doing expenses the way I used to do them?

No, after the go-live date (see tentative schedule above), all paper expense reports will be returned to the volunteer for re-submission in Concur. The new Concur platform has been endorsed by the IEEE Financial Committee (FinCom) to move IEEE away from paper forms and receipts, delayed payments, and the inability to track the status of reimbursements. Concur is a robust and user-friendly platform that will deliver a broad range of benefits, including electronic submission, ease of use, faster reimbursement, visibility into approval flow, and security of personal information.

Getting Started: Register/Account Login/Mobile App

11. How do I get started?

You can [view a brief informational video](#) (Note: Features such as Concur Request and Triplink will not be immediately available for expense reimbursement). For registration details, please refer to Question #12.

12. How do I register and log in?

Using the new Concur platform is easy.

- You need an IEEE Account to log in to Concur. If you do not have an IEEE Account, [create one here](#).
- If you already have an IEEE Account, [request access to Concur](#). Within 24 hours of creating your Concur account, you will receive an email with login details.

Logging in

- [Log into Concur](#) (you may be prompted to enter your IEEE credentials to log into the IEEE network before entering Concur).
- Fill out your profile, including your banking and traveler profile information (where applicable).
- If your local currency is **not** USD, EUR, CAD, or INR, you will need to create a Western Union profile for reimbursement in your local currency. (See Question # 22A for details.)

[Download the app:](#)

- [For Apple users](#)
- [For Android users](#)

To sign into the mobile app, use the code **EDDB6G** to enable single sign-on.

[View a comprehensive video tutorial on the new application.](#)

13. If I already have Concur today, can I use the same login user ID?

No. Every company or institution's use of Concur is independent from one another, so you'll need to establish a unique account at IEEE in order to use this platform for IEEE expense reports.

14. Is there a mobile app associated with the new Concur platform?

Yes, Concur has a mobile app that allows you to create, submit, and/or approve expense reports directly from your phone or tablet and also enables the easy attachment of photos of receipts.

15. How do I get the mobile app and sign in?

You can download the Concur mobile app for [iPhone here](#) and [Android here](#). Or learn more at: concur.com/en-us/mobile. To sign into the app, use the code **EDDB6G** to enable single sign-on.

Banking/Financial Information

16. Can I delegate the submitting of an expense report to someone else, such as a person on my staff or an IEEE staff member?

Yes, details on how to designate as a “Delegate” are available in training materials.

Note: Individuals who approve expense reports also may identify “Approval Delegates” to serve as a backup when the customary approver is out.

17. How will I get reimbursed for my expenses?

You'll be reimbursed electronically and each user will be responsible for maintaining their own banking information within their user profile. (See also Question #22A regarding the need to sign up for payment through Western Union for certain currencies.)

17A. What is the “Expense Report Purpose (ERP)” field?

The Expense Report Purpose (ERP) field automatically drives the General Ledger (GL) coding and approvals; you cannot edit the GL code in Concur. Your dedicated IEEE staff support provides ERP information. Or, you may refer to the [ERP “cheat sheet.”](#)

Note also that an expense report can have multiple expense report purposes; each line can be different.

18. Will my expense reimbursement be made in my country’s currency?

Yes, all electronic payments processed through Concur will be made in the local currency, based on the country of residence in each user’s personal profile. (See also Question #22A regarding the need to sign up for payment through Western Union for certain currencies.)

18A. How do I enter transactions in a foreign currency?

When entering transactions in a foreign currency, use the currency that is shown on the receipt. Concur converts transactions to your local currency and reimbursements will be made in your local currency. (See also Question #22A regarding the need to sign up for payment through Western Union for certain currencies.)

19. Can volunteers still get checks or do they have to have direct deposit?

IEEE will no longer be issuing checks for these reimbursements. All payments for expense reports processed through Concur will be issued electronically. (See also Question #22A regarding the need to sign up for payment through Western Union for certain currencies.)

20. Are there any issues with direct deposit in some countries?

In accordance with U.S. government regulations, payment is not allowed to some countries ([see list \[PDF\]](#)). In these instances, continue to use the current Excel spreadsheet process.

21. Is my data within the new Concur platform secure?

Yes. Concur meets ISO, SSAE, and PCI Compliance standards, ensuring the utmost in security measures.

22. What if I do not want to give Concur my financial information?

The only way to be reimbursed is electronically and your bank information will need to be entered in your Concur profile (for some countries it will be a Western Union profile – see Question #22A). If you do not provide the banking information, the payment cannot be processed. Personal information entered in the profile is secure and can only be managed by the user.

22A. Do I enter my banking information in Concur or Western Union?

The reimbursement currency in your Concur profile is based on your country of residence. If you reside in a country where one of the currencies listed below is considered the local currency, you must enter your banking information directly into Concur (select Profile > Profile Settings > Bank information).

- U.S. dollar (USD)
- Euro (EUR)
- Canadian dollar (CAD)
- Indian rupee (INR)

If your currency is NOT one of the four listed above, you will need to complete a one-time enrollment with Western Union in order to receive electronic reimbursements from IEEE. To enroll, please [complete the required registration form](#). Please enter your 8-digit IEEE member number in the “Payee ID” field.

Questions regarding the Western Union registration process can be forwarded to Western Union by email at epayvendormanagement@westernunion.com or by phone at +1 800 815 2460 option 1.

For all other general inquiries, please continue to contact the IEEE project team at concurfeedback@ieee.org.

Additional Resources

23. Where can I go for more information?

In addition to the various communications that IEEE volunteers and professional staff members will be receiving over the coming months to help support their understanding of and transition to the new platform, information will also be available [here](#). Users can also find additional information about Concur at concur.com.

Volunteers may reach out to [Concur’s user support desk \(PDF\)](#) for technical assistance. Or contact IEEE’s project team at concurfeedback@ieee.org for general assistance or questions regarding Concur.

24. Can I use Concur for expenses incurred in 2018?

No, please use your current process for 2018 expenses. Concur will be used for expenses incurred beginning in 2019. (The only exception is for pre-selected volunteers participating in the Q4 2018 pilot.)

25. How will volunteer leaders approve the expenses of other volunteers who they have the responsibility to approve?

Those volunteer leaders (i.e., Treasurers that have rights to paper process approval) will have the same approval authority in Concur. For further information, please refer to this link [here](#). Users can also find additional information about Concur at concur.com.

26. The IEEE Travel Program uses Concur Travel as its primary online booking tool. Will this be integrated with IEEE's Concur volunteer expense reimbursement platform?

Yes, upon launch of IEEE's volunteer expense reimbursement platform, the Concur Expense and Travel tools will be integrated. Volunteers who want to learn more about IEEE's Travel Program and the benefits of Concur Travel, click [here](#).

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