

CONCUR REIMBURSEMENT GUIDELINES

Concur is the platform used by IEEE to process reimbursements and payments. This guideline has been prepared to assist IAS members to complete travel reimbursements on the Concur system. All information pertaining to Concur (FAQs, Training & Quick reference, informational video and Support Information) can also be found at the following link: [IEEE Expense Report](#)

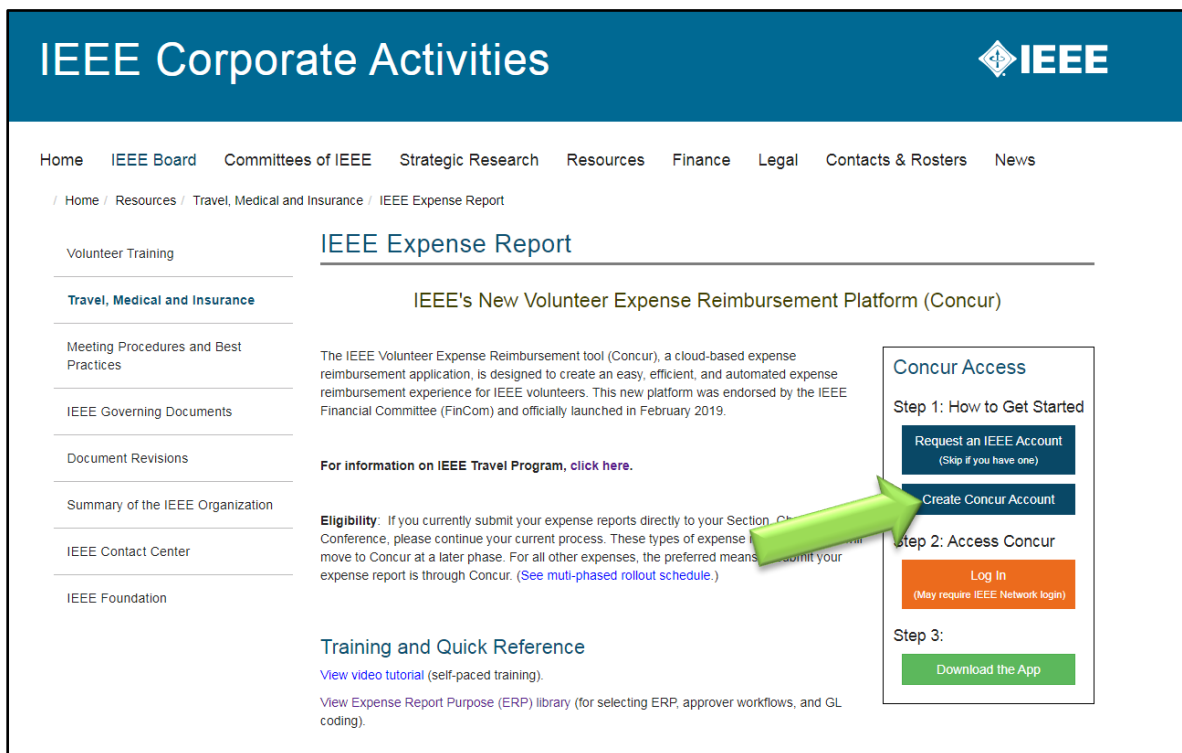
Please follow the step-by-step guidelines below to process your travel reimbursement.

1. Concur User Registration

Click on the following link to open the IEEE Expense Report webpage:

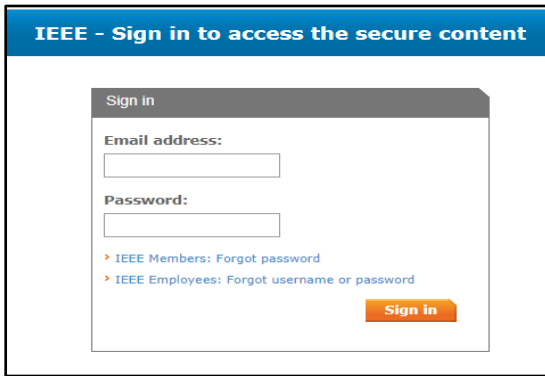
https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report?_ga=2.88374299.1054005028.1570435217-1484028441.1565462342

The webpage below will open. Click on “Create Concur Account” under Step 1 of Concur Access on the right hand side of the webpage below as indicated with the green arrow.



The screenshot displays the IEEE Corporate Activities website. The main header is blue with the IEEE logo. The navigation menu includes Home, IEEE Board, Committees of IEEE, Strategic Research, Resources, Finance, Legal, Contacts & Rosters, and News. The breadcrumb trail shows: Home / Resources / Travel, Medical and Insurance / IEEE Expense Report. The page title is "IEEE Expense Report". The main content area is titled "IEEE's New Volunteer Expense Reimbursement Platform (Concur)". It contains a paragraph describing the Concur platform, a link for more information, and an eligibility section. On the right side, there is a "Concur Access" sidebar with three steps: Step 1: How to Get Started (with buttons for "Request an IEEE Account" and "Create Concur Account"), Step 2: Access Concur (with a "Log In" button), and Step 3: (with a "Download the App" button). A green arrow points to the "Create Concur Account" button.

The webpage below will open once you click “Create Concur Account.” Please log in to the webpage using your IEEE login credentials i.e. the same credentials you use to access your IEEE account.



Please create your concur profile by completing the Concur registration page. The information with a red asterisk is compulsory. Please complete the registrations as follows:

For the two questions – please answer as follows:

1. Will you be submitting expense reimbursement requests through Concur? **Select Yes**
2. Would you like to book travel reservations through Concur Travel? **Select No**

The following profile information needs to be completed:

- First Name
- Middle Name (Optional)
- Last Name
- Email Address
- Member ID
- Country of Residence

Please select Yes for at least one of the options below

Will you be submitting expense reimbursement requests through Concur? * Yes No

Would you like to book travel reservations through Concur Travel? * Yes No

Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

First Name *

Middle Name/Middle Initial

Last Name *

Email Address *

Member ID *

Country of Residence *

* Fields with an asterisk are required

 Click “Submit” when Done

Please click “Submit” after all the required information is completed.

The box below will appear once you submit the form.

Thank You

We have received your request for access to Concur. We are processing your request which can take up to 24 hours. You will access Concur via the link on the [Volunteer Resource page](#).

For general questions regarding Concur, please contact concurfeedback@ieee.org.

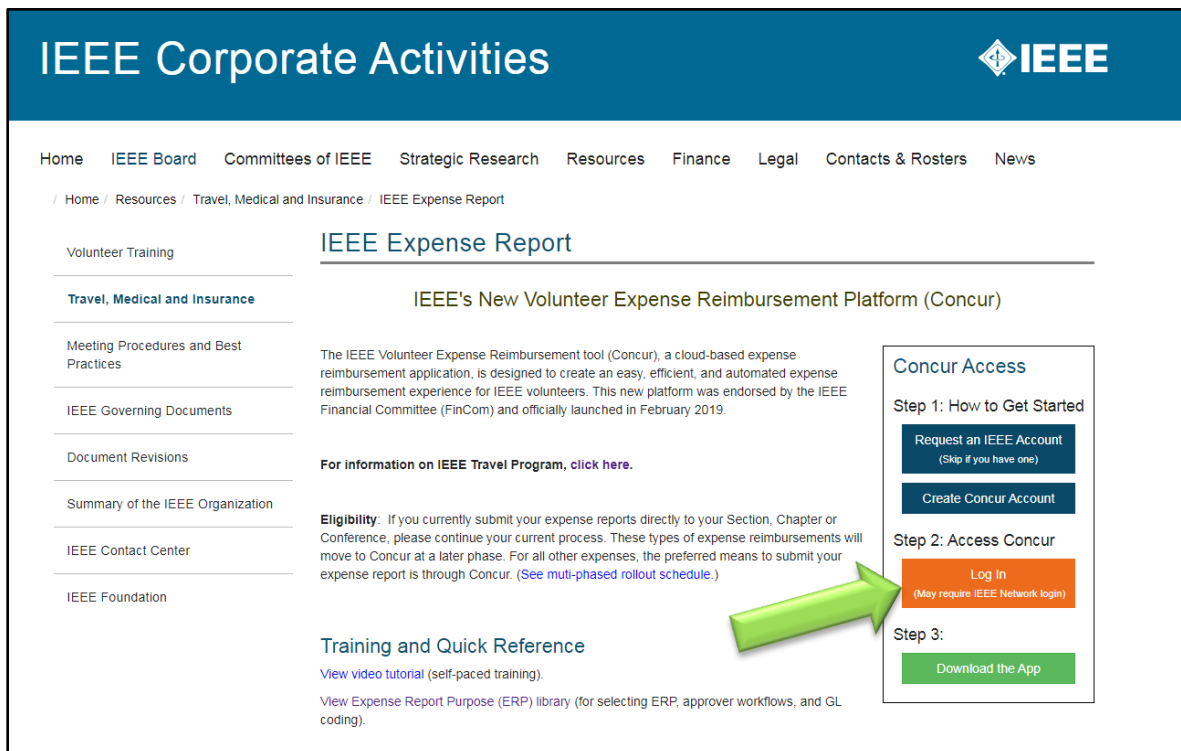
It will take up to 24 hours for your Concur profile to be completed. Once your registration is complete and profile is created – you can proceed with your travel reimbursement.

2. Access Concur and complete reimbursement

Click on the following link to open the IEEE Expense Report webpage once your Concur Account is created.

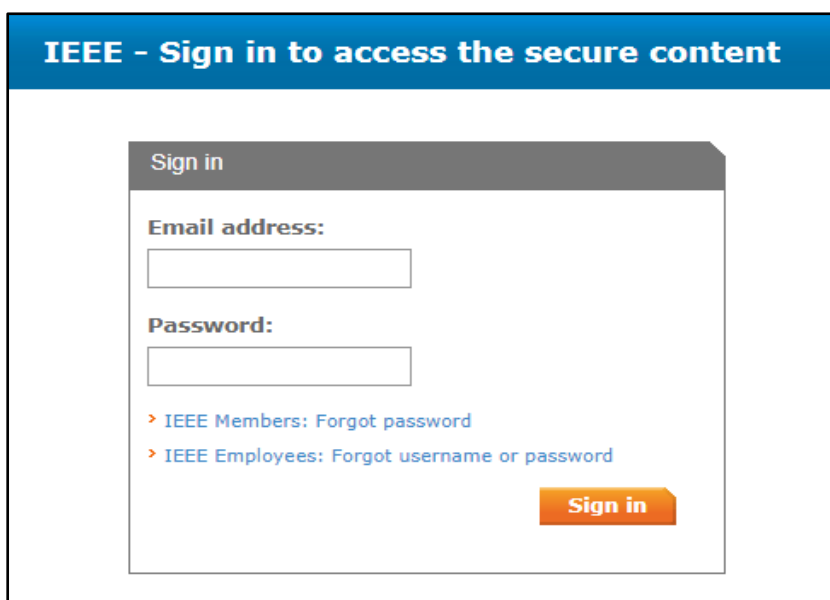
https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report?_ga=2.88374299.1054005028.1570435217-1484028441.1565462342

The webpage below will open. Click on “Access Concur” under Step 2 of Concur Access on the right hand side of the webpage below as indicated below.



The screenshot shows the IEEE Corporate Activities webpage. The main header is "IEEE Corporate Activities" with the IEEE logo. The navigation menu includes Home, IEEE Board, Committees of IEEE, Strategic Research, Resources, Finance, Legal, Contacts & Rosters, and News. The breadcrumb trail is Home / Resources / Travel, Medical and Insurance / IEEE Expense Report. The main content area is titled "IEEE Expense Report" and "IEEE's New Volunteer Expense Reimbursement Platform (Concur)". It contains a description of the Concur tool, an eligibility note, and a link to a video tutorial. On the right side, there is a "Concur Access" sidebar with three steps: Step 1: How to Get Started (Request an IEEE Account, Create Concur Account), Step 2: Access Concur (Log In), and Step 3: Download the App. A green arrow points to the "Log In" button in Step 2.

The webpage below will open once you click “Create Concur Account.” Please log in to the webpage using your IEEE login credentials.



The screenshot shows the IEEE sign-in page. The header is "IEEE - Sign in to access the secure content". The sign-in form has a title "Sign in" and two input fields: "Email address:" and "Password:". Below the fields are two links: "> IEEE Members: Forgot password" and "> IEEE Employees: Forgot username or password". At the bottom right of the form is a "Sign in" button.

Note: 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 click on the following link and complete your registration. Please see Western Union information and step-by-step guideline for registration in **Part 10** of this document.

<https://payee.globalpay.westernunion.com/PayeeManager/BeneficiaryEnrollment/SpecifyPayeeID.aspx?id=F1810E0E0077373DA43DBACFF6679AAB>

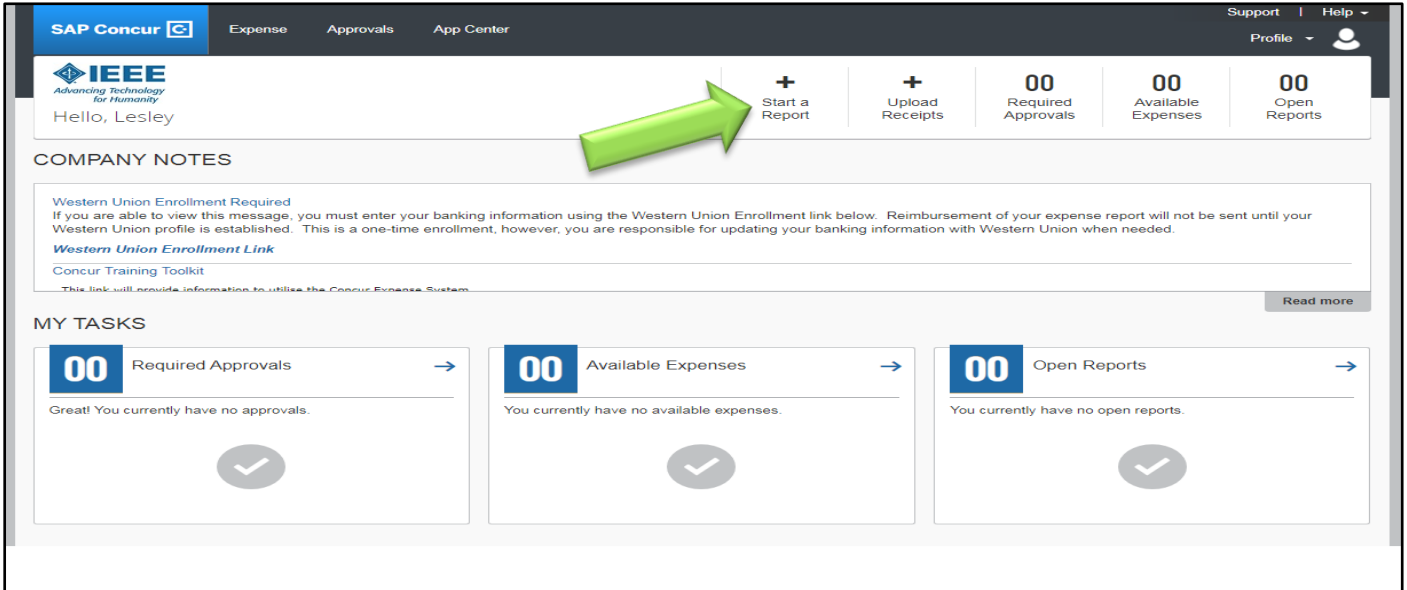
Please enter your 8-digit IEEE member number in the “Payee ID” field. You will need to complete your Western Union registration before completing your reimbursement.

SAP Concur App: You can also download the “SAP Concur” App from both the App Store for Apple users and on Google Play for Android users. Reimbursements can be done using the SAP Concur Application. To sign into the mobile app, use the code **EDDB6G** to enable single sign-on. A comprehensive video tutorial for the Concur App is available at the following link: <https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report/concur-training>

Part 1: Start an Expense Report

Please follow the steps below to complete your Travel Reimbursement on Concur

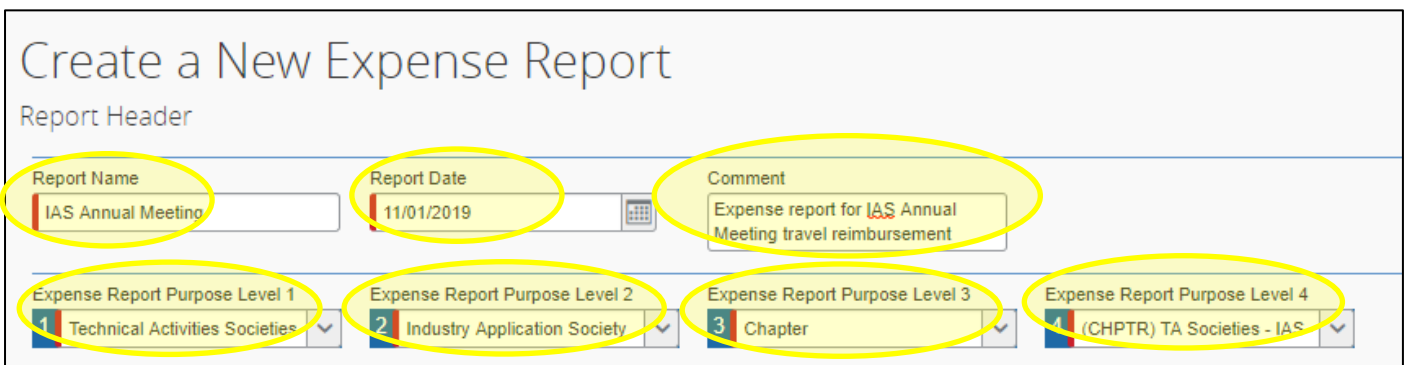
Step 1: Click “Start a Report”



The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'Expense', 'Approvals', and 'App Center'. The user's name 'Lesley' is displayed. A green arrow points to the '+ Start a Report' button. Other buttons include '+ Upload Receipts', '00 Required Approvals', '00 Available Expenses', and '00 Open Reports'. Below the navigation bar, there is a 'COMPANY NOTES' section with a message about Western Union Enrollment. Underneath, the 'MY TASKS' section shows three cards: 'Required Approvals', 'Available Expenses', and 'Open Reports', each with a '00' status and a checkmark icon.

Step 2: Enter the Expense Report details as explained below and highlighted in yellow in the figure.

- Report Name: Enter the name of your expense report under Report Name. In the example below, the expense report was done for the IAS Annual Meeting.
- Report Date: The report date will automatically indicate the date you create the report. Leave the date as is.
- Enter any additional information regarding your Expense Report under the comments section.
- Expense Report Purpose Level 1: Select “Technical Activities Societies” from the dropdown menu
- Expense Report Purpose Level 2: Select “Industry Application Society” from the dropdown menu
- Expense Report Purpose Level 3: Select “Chapter” from the dropdown menu
- Expense Report Purpose Level 4: Select “(CHPTR) TA Societies – IAS – Chapter”



The screenshot shows the 'Create a New Expense Report' form. The 'Report Header' section includes the following fields, all highlighted in yellow:

- Report Name: IAS Annual Meeting
- Report Date: 11/01/2019
- Comment: Expense report for IAS Annual Meeting travel reimbursement
- Expense Report Purpose Level 1: 1 Technical Activities Societies
- Expense Report Purpose Level 2: 2 Industry Application Society
- Expense Report Purpose Level 3: 3 Chapter
- Expense Report Purpose Level 4: 4 (CHPTR) TA Societies - IAS

Once the information above has been selected, click “Next” on the bottom right of the page once done to proceed

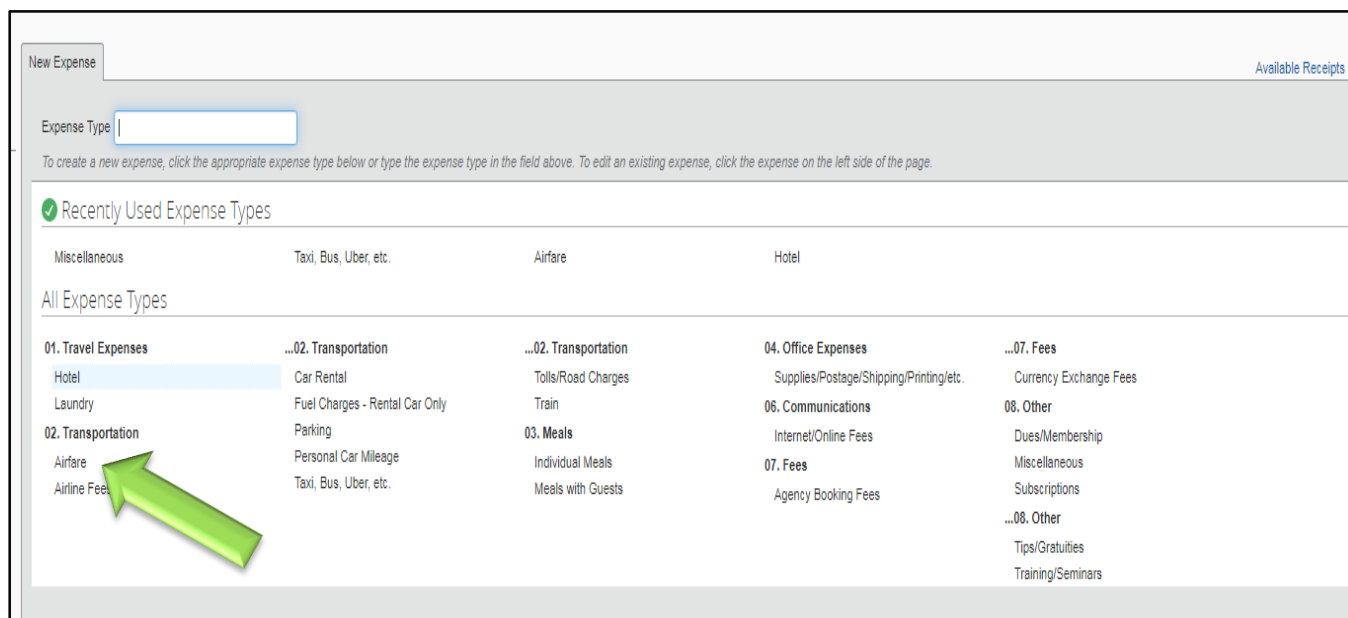
Step 3: The page below will appear. Click “New Expense” on the left hand pane as indicated by the green arrow once the new expense report window opens to select the various expenses to be included as part of the expense report.

The screenshot displays the SAP Concur Expense Management interface. At the top, the navigation bar includes 'SAP Concur', 'Expense', 'Approvals', and 'App Center'. The main header shows 'Manage Expenses' and 'AMTGP'. A green arrow points to the '+ New Expense' button in the left-hand pane. The right-hand pane is titled 'New Expense' and contains an 'Expense Type' input field. Below this field, there are two sections: 'Recently Used Expense Types' and 'All Expense Types'. The 'Recently Used Expense Types' section lists 'Miscellaneous', 'Taxi, Bus, Uber, etc.', 'Airfare', and 'Hotel'. The 'All Expense Types' section is organized into a grid with categories: '01. Travel Expenses', '02. Transportation', '03. Meals', '04. Office Expenses', and '07. Fees'. Under '01. Travel Expenses', 'Hotel' is highlighted. Under '02. Transportation', 'Car Rental' is highlighted. Under '03. Meals', 'Individual Meals' is highlighted. Under '04. Office Expenses', 'Supplies/Postage/Shipping/Printing/etc.' is highlighted. Under '07. Fees', 'Currency Exchange Fees' is highlighted. The bottom of the page shows 'No Expenses Found' in the left pane and 'Available Receipts' in the right pane.

Part 2: Airfare Expense Reimbursement

Please follow the steps below to add airfare reimbursements on Concur. The steps outline how to enter your flight ticket details and attach your flight ticket.

1. **Step 1:** Click on “Airfare” under “02. Transportation” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow below.



The screenshot shows the 'New Expense' window in Concur. At the top, there is a 'New Expense' tab and an 'Available Receipts' link. Below that is an 'Expense Type' dropdown menu. A note below the dropdown reads: '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.' The main area is divided into 'Recently Used Expense Types' and 'All Expense Types'. Under 'All Expense Types', there are several categories: 01. Travel Expenses, ...02. Transportation, ...02. Transportation, 04. Office Expenses, ...07. Fees, 08. Other, 06. Communications, 07. Fees, and ...08. Other. The 'Airfare' option under '02. Transportation' is highlighted with a green arrow.

2. Step 2: Enter Air Ticket Expense Details

The expense window for the airfare expense will pop out. Please enter your airfare details as follows and also highlighted in the figure:

- Expense Type: Keep as “Airfare”
- Transaction Date: Enter date that your ticket was purchased
- Ticket Number: Enter your ticket number (optional)
- From Airport: Enter the airport you departed from (if you cannot find your specific airport from the dropdown list provided – please email concurfeedback@ieee.org to add your airport)
- To Airport: Enter the airport you travelled to (if you cannot find your specific airport from the dropdown list provided – please email concurfeedback@ieee.org to add your airport)
- From Date: Enter the date you departed on (should be same as flight ticket)
- To Date: Enter the date you landed back home (should be the same as the flight ticket)
- Vendor: Select the Airlines from the list provided. If you cannot find your airlines, simply type in the name of your airlines.
- Airline Travel Service Code: Select class of travel from options provided. Coach class is the same as Economy class.
- City of Purchase: Enter the City of Purchase for your flight ticket (optional)
- Payment Type: Leave as “Out of Pocket”
- Amount: Enter the cost of the ticket. The cost will automatically appear in your local currency. The currency used in the example is ZAR, this can be changed by selecting the downward arrow and choosing the desired currency.

The air ticket used for the example below can be found in the appendix at the end of this document.

The screenshot shows the 'New Expense' form with several fields highlighted by yellow circles. The highlighted fields are: Expense Type (Airfare), Transaction Date (08/31/2019), Ticket Number (1723292673094), From Airport (JNB Johannesburg - OR Tambo), To Airport (JFK New York - John F. Kennedy), From Date (09/26/2019), To Date (10/06/2019), Vendor (Emirates Airlines), Airline Travel Service Code (Coach Class), City of Purchase (Johannesburg, SOUTH AFRICA), Payment Type (Out of Pocket), and Amount (10,863.93 ZAR). The form also includes sections for Expense Report Purpose Levels, Entity, Business Unit, Cost Center, and CB Account #.

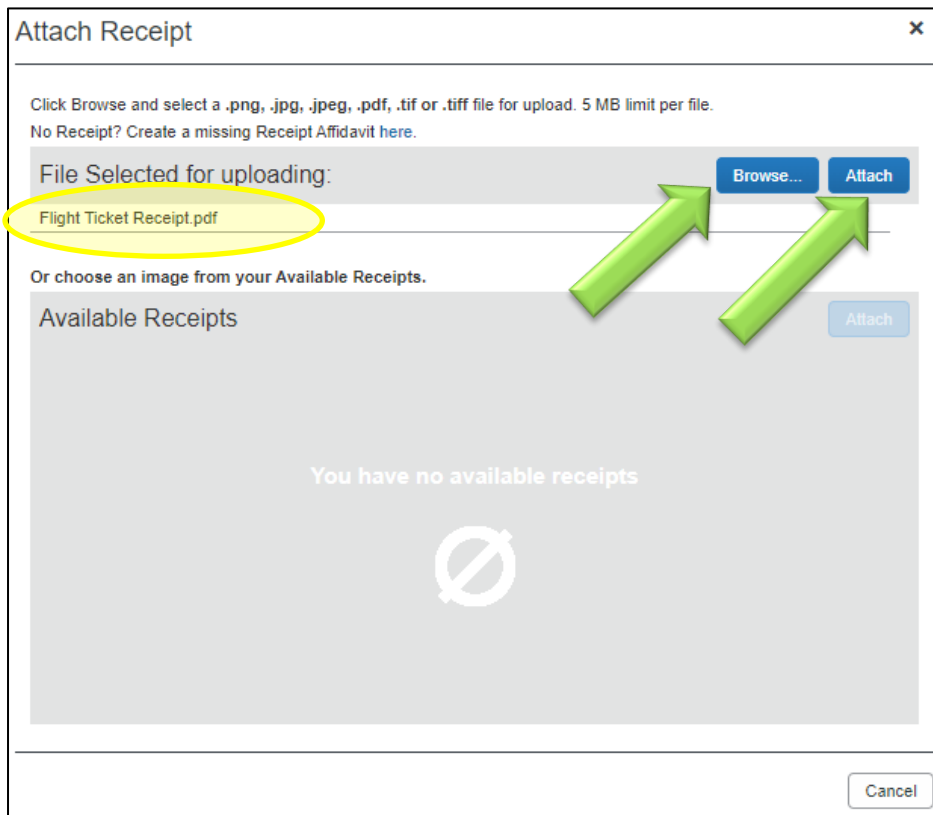
3. Step 3: Attach Air Ticket Receipt

Once you have completed all your airfare information, you can proceed to attach your air ticket/receipt. Please click "Attach Receipt" at the bottom right of the page as indicated with the green arrow below.

This screenshot is identical to the one above, but with a large green arrow pointing down towards the 'Attach Receipt' button at the bottom right of the form. The 'Attach Receipt' button is highlighted in blue, indicating it is the next step in the process.

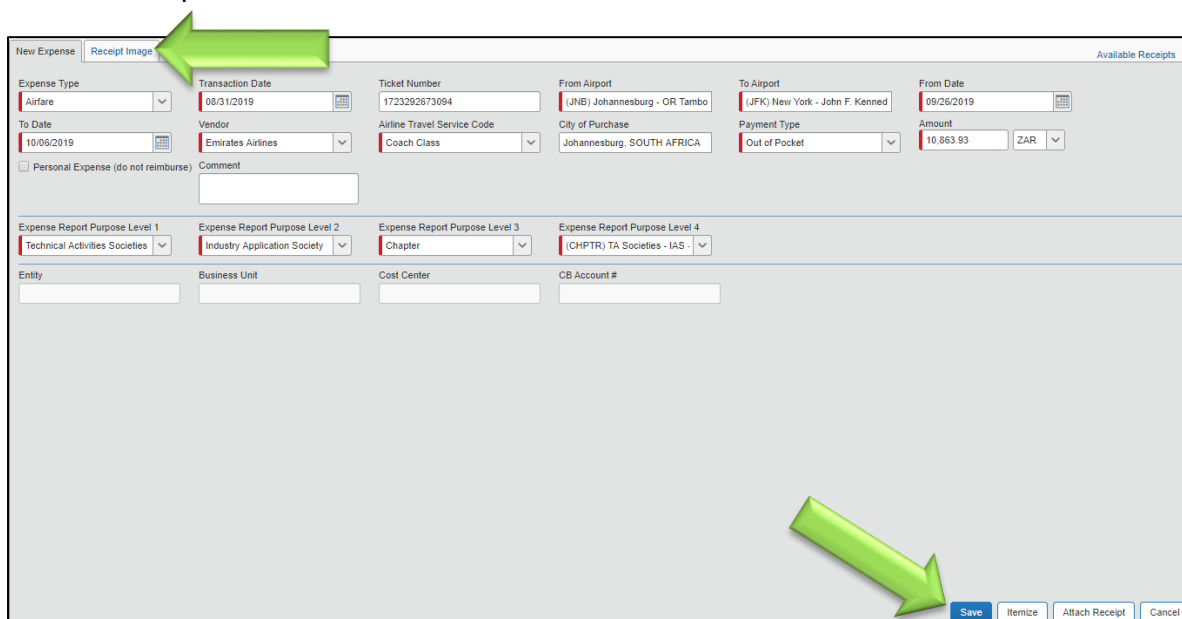
4. Step 4: Browse and Attach Flight Ticket Receipt

The window below will open. First click “Browse” to find and open the flight ticket to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the receipt. In the example below, the document to be uploaded is “Flight Ticket Receipt.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.



5. Step 5: Save the Airfare Expense

Once the flight ticket is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the flight ticket attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the airfare expense. The expense will now appear on the left pane under the “Expenses” section.



The Airfare expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.

The screenshot displays the Concur Expense Report interface for the "IAS Annual Meeting".

Expenses Table:

Date	Expense Type	Amount	Requested
08/31/2019	Airfare Emirates Airlines, Johannesburg	ZAR 10,863.93	ZAR 10,863.93

New Expense Form:

Expense Type:

Recently Used Expense Types:

- Airfare
- Personal Car Mileage
- Taxi, Bus, Uber, etc.
- Training/Seminars
- Hotel

All Expense Types:

- 01. Travel Expenses
 - Hotel
 - Laundry
 - 02. Transportation
 - Airfare
 - Airline Fees
- ...02. Transportation
 - Car Rental
 - Fuel Charges - Rental Car Only
 - Parking
 - Personal Car Mileage
 - Taxi, Bus, Uber, etc.
- ...02. Transportation
 - Tolls/Road Charges
 - Train
- 03. Meals
 - Individual Meals
 - Meals with Guests
- 04. Office Expenses
 - Supplies/Postage/Shipping/Printing/etc.
- 06. Communications
 - Internet/Online Fees
- 07. Fees
 - Agency Booking Fees
- ...07. Fees
 - Currency Exchange Fees
- 08. Other
 - Dues/Membership
 - Miscellaneous
 - Subscriptions
 - ...08. Other
 - Tips/Gratuities
 - Training/Seminars

Part 3: Conference Registration Fee Reimbursement

Please follow the steps below to attach your conference registration invoice on Concur under the Training/Seminar category

- Step 1:** Click on “Training/Seminars” under “08. Other” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

The screenshot shows the 'New Expense' form in Concur. At the top, there is an 'Expense Type' dropdown menu. Below it, a message reads: '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.' The interface is divided into two main sections: 'Recently Used Expense Types' and 'All Expense Types'. The 'Recently Used Expense Types' section lists: Airfare, Personal Car Mileage, Taxi, Bus, Uber, etc., Training/Seminars, and Hotel. The 'All Expense Types' section is organized into columns: 01. Travel Expenses (Hotel, Laundry), ...02. Transportation (Car Rental, Fuel Charges - Rental Car Only, Parking, Personal Car Mileage, Taxi, Bus, Uber, etc.), ...02. Transportation (Tolls/Road Charges, Train), 03. Meals (Individual Meals, Meals with Guests), 04. Office Expenses (Supplies/Postage/Shipping/Printing/etc.), 06. Communications (Internet/Online Fees), 07. Fees (Agency Booking Fees), ...07. Fees (Currency Exchange Fees), 08. Other (Dues/Membership, Miscellaneous, Subscriptions, ...08. Other (Tips/Gratuities, Training/Seminars)). A green arrow points to the 'Training/Seminars' option under the '08. Other' category.

- Step 2:** Enter details for the Training/Seminars expense detailed below and highlighted in yellow in the figure below. The example below was completed using the registration invoice in the appendix.
 - Transaction Date: Enter date conference registration fee was paid
 - Enter Vendor Name: Enter conference name
 - City of Purchase (optional): Enter the city of purchase
 - Payment Type: “Out of Pocket”
 - Amount: Select the applicable currency and enter the amount indicated on your conference registration invoice. In the example below, the currency was in USD. The expense is automatically converted to your local currency.
 - Comment (optional): Enter any additional comments if applicable.

The screenshot shows the 'New Expense' form with several fields highlighted in yellow. The 'Expense Type' dropdown is set to 'Training/Seminars'. The 'Transaction Date' is '08/21/2019'. The 'Enter Vendor Name' field contains 'IEEE IAS Annual Meeting'. The 'Amount' field is '475.00' and the 'Currency' is 'USD'. The 'Payment Type' dropdown is set to 'Out of Pocket'. Below these fields, there are sections for 'Expense Report Purpose Level 1' through 'Level 4', 'Entity', 'Business Unit', 'Cost Center', and 'CB Account #'. The 'Expense Report Purpose Level 1' is 'Technical Activities Societies', 'Level 2' is 'Industry Application Society', 'Level 3' is 'Chapter', and 'Level 4' is '(CHPTR) TA Societies - IAS'.

3. Step 3: Attach Registration Invoice

Once all the details of the conference registration is complete, Click “Attach Receipt” at the bottom right of New Training/Seminar Expense as indicated with the green arrow below.

The screenshot shows the 'New Expense' form with the following fields and values:

- Expense Type: Training/Seminars
- Transaction Date: 08/21/2019
- Enter Vendor Name: IEEE IAS Annual Meeting
- City of Purchase: (empty)
- Payment Type: Out of Pocket
- Amount: 475.00 USD
- Rate (ZAR=1 USD): 15.39184184
- =Amount in ZAR: 7,311.12
- Expense Report Purpose Level 1: Technical Activities Societies
- Expense Report Purpose Level 2: Industry Application Society
- Expense Report Purpose Level 3: Chapter
- Expense Report Purpose Level 4: (CHPTR) TA Societies - IAS
- Entity: (empty)
- Business Unit: (empty)
- Cost Center: (empty)
- CB Account #: (empty)

At the bottom right, there are buttons for 'Save', 'Itemize', 'Attach Receipt', and 'Cancel'. A large green arrow points to the 'Attach Receipt' button.

4. Step 4: Browse and Attach the Registration Invoice

The window below will open. First click “Browse” to find and open the Registration invoice to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the invoice. In the example below, the document to be uploaded is “Registration Invoice.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.

The 'Attach Receipt' dialog box contains the following information:

- Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.
- No Receipt? Create a missing Receipt Affidavit here.
- File Selected for uploading: Registration Invoice.pdf (highlighted with a yellow oval)
- Buttons: Browse..., Attach
- Or choose an image from your Available Receipts.
- Available Receipts: (empty list)
- You have no available receipts (with a refresh icon)
- Buttons: Attach, Cancel

Two green arrows point to the 'Browse...' and 'Attach' buttons.

5. Step 5: Save the Registration Fee Expense

Once the Registration Invoice is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Registration fee invoice attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Registration fee expense. The expense will now appear on the left pane under the “Expenses” section.

The screenshot shows the 'New Expense' form with the following fields and values:

- Expense Type:** Training/Seminars
- Transaction Date:** 08/21/2019
- Enter Vendor Name:** IEEE IAS Annual Meeting
- City of Purchase:** (empty)
- Payment Type:** Out of Pocket
- Amount:** 475.00 USD
- Rate (ZAR=1 USD):** 15.39184184
- =Amount in ZAR:** 7,311.12
- Expense Report Purpose Level 1:** Technical Activities Societies
- Expense Report Purpose Level 2:** Industry Application Society
- Expense Report Purpose Level 3:** Chapter
- Expense Report Purpose Level 4:** (CHPTR) TA Societies - IAS
- Entity:** (empty)
- Business Unit:** (empty)
- Cost Center:** (empty)
- CB Account #:** (empty)

Buttons at the bottom right: Save, Itemize, Attach Receipt, Cancel.

The Registration expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.

The screenshot shows the 'Expenses' section of the 'IAS Annual Meeting' report. The table below is highlighted in yellow:

Date	Expense Type	Amount	Requested
08/31/2019	Airfare Emirates Airline Johannesburg	ZAR 10,863.93	ZAR 10,863.93
08/21/2019	Training/Seminars IEEE IAS Annual Meeting	ZAR 7,311.12 USD 475.00	ZAR 7,311.12

The right side of the screen shows the 'Recently Used Expense Types' and 'All Expense Types' lists.

Part 4: Hotel Fee Reimbursement

Please follow the instructions below to submit your Hotel expense

- Step 1:** Click on **“Hotel”** under **“01. Travel Expenses”** which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

The screenshot shows the 'New Expense' form with a 'Recently Used Expense Types' section. Under the '01. Travel Expenses' category, the 'Hotel' option is highlighted with a green arrow. Other categories include '02. Transportation', '03. Meals', '04. Office Expenses', '06. Communications', '07. Fees', and '08. Other'.

- Step 2:** Enter details for the Hotel expense as outlined and highlighted in yellow in the figure below. The hotel invoice used in the example below can be found in the Appendix.
 - Expense type: Type needs to be “Hotel”
 - Transaction Date: Enter date the accommodation was paid (usually the check-in date)
 - Enter Vendor Name: Select your hotel from the dropdown list or alternatively type in your hotel name.
 - City of Purchase: Enter your city of purchase i.e. the city where the hotel is located.
 - Payment Type: “Out of Pocket”
 - Amount: Select the currency indicated on the hotel invoice and enter the amount for the hotel. In the example below, the amount was \$241.40 in USD.

The screenshot shows the 'New Expense' form with several fields highlighted in yellow: 'Expense Type' (Hotel), 'Transaction Date' (10/03/2019), 'Vendor' (Hilton Hotels), 'City of Purchase' (Baltimore, Maryland), 'Payment Type' (Out of Pocket), and 'Amount' (241.40 USD). The form also includes fields for 'Expense Report Purpose Level 1-4', 'Entity', 'Business Unit', 'Cost Center', and 'CB Account #'.

3. Step 3: Itemization of Hotel Invoice

Once the hotel expense details are entered, click on “**Itemize**” at the bottom right corner of the page as indicated in the next figure with the green arrow. Itemization is needed to itemize various fees on the hotel invoice i.e. room rate, room tax, tourism levy etc.

The screenshot shows the 'New Expense' form with the following details:

- Expense Type: Hotel
- Transaction Date: 10/03/2019
- Vendor: Hilton Hotels
- City of Purchase: Baltimore, Maryland
- Payment Type: Out of Pocket
- Amount: 241.40 USD
- Rate (ZAR=1 USD): 15.30743866
- Amount in ZAR: 3.695.22
- Expense Report Purpose Level 1: Technical Activities Societies
- Expense Report Purpose Level 2: Industry Application Society
- Expense Report Purpose Level 3: Chapter
- Expense Report Purpose Level 4: (CHPTR) TA Societies - IAS
- Entity, Business Unit, Cost Center, and CB Account # fields are empty.

A large green arrow points to the 'Itemize' button at the bottom right of the form.

The Nightly Lodging Expenses window will appear below once the “Itemize” is clicked. Enter the details for the Hotel Accommodation as outlined in the figure below and highlighted in yellow.

- Check-in Date: Please enter the check-in date
- Check-out Date: Please enter the check-out date
- Number of Nights: Make sure the number of nights indicated is correct
- Room Rate: Enter the daily room rate as indicated in your invoice
- Room Tax: Enter any applicable daily taxes
- Additional Charges: Enter any additional charges if applicable

Click on Save Itemization at the bottom right corner when done. Make sure the itemization adds up to the total amount entered under hotel expense. In the example above, the total was \$241.50. The amount was made up of the room rate (\$209), city tax (\$19.86) listed as room tax and state tax (\$12.54) listed as other room tax 1.

The screenshot shows the 'Nightly Lodging Expenses' form with the following details:

- Check-in Date: 10/03/2019
- Check-out Date: 10/04/2019
- Number of Nights: 1
- Recurring Charges (each night):
 - Room Rate: 209.00
 - Room Tax: 19.86
 - Other Room Tax 1: 12.54
 - Other Room Tax 2: (empty)
- Additional Charges (each night):
 - Expense Type: Choose an expense type
 - Amount: (empty)
 - Expense Type: Choose an expense type
 - Amount: (empty)

The 'Room Rate', 'Room Tax', and 'Other Room Tax 1' fields are highlighted in yellow.

Once all the itemization information is entered, click on “Save Itemization” at the bottom right of the page as indicated with the green arrow below.

The screenshot shows the 'Nightly Lodging Expenses' form. At the top, there are fields for 'Check-in Date' (10/03/2019), 'Check-out Date' (10/04/2019), and 'Number of Nights' (1). Below this is the 'Recurring Charges (each night)' section with fields for 'Room Rate' (209.00), 'Room Tax' (19.86), 'Other Room Tax 1' (12.54), and 'Other Room Tax 2'. There is a checkbox for 'Room rate and taxes will be shown as separate expenses'. The 'Additional Charges (each night)' section has two rows, each with a dropdown for 'Expense Type' and a text field for 'Amount'. A large green arrow points down to the 'Save Itemizations' button at the bottom right, next to a 'Cancel' button.

4. Step 4: Attach the Hotel Invoice

Once all the details of the Hotel expense is complete and the itemization is done, Click “Attach Receipt” at the bottom right of the expense as indicated with the green arrow below.

The screenshot shows the 'Nightly Lodging Expenses' form with more details. At the top right, it says 'Total Amount: USD 241.40 | Itemized: USD 241.40 | Remaining: USD 0.00'. The 'Expense Type' is 'Hotel', 'Transaction Date' is '10/03/2019', 'Vendor' is 'Hilton Hotels', 'City of Purchase' is 'Baltimore, Maryland', and 'Payment Type' is 'Out of Pocket'. The 'Amount' is '241.40' USD, with a rate of '15.30743066' ZAR per USD, resulting in an amount of '3,695.22' ZAR. There is a 'Comment' field. Below this are 'Expense Report Purpose' levels 1 through 4, with values: 'Technical Activities Societies', 'Industry Application Society', 'Chapter', and '(CHPTR) TA Societies - IAS'. At the bottom, there are fields for 'Entity' ((30) S/C), 'Business Unit' ((0340) Industry Applications), 'Cost Center' ((01900) Committee & Other), and 'CB Account #'. A large green arrow points down to the 'Attach Receipt' button at the bottom right, next to 'Save', 'Add Itemization', and 'Cancel' buttons.

5. Step 5: Browse and attach the Hotel Invoice

The window below will open. First click “Browse” to find and open the Hotel Invoice to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the invoice. In the example below, the document to be uploaded is “Hotel Invoice.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.

Attach Receipt

Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.
No Receipt? Create a missing Receipt Affidavit [here](#).

File Selected for uploading:
Hotel Invoice.pdf

Browse... Attach

Or choose an image from your Available Receipts.

Available Receipts

You have no available receipts

Attach

Cancel

6. Step 6: Save the Hotel Expense

Once the Hotel Invoice is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Hotel invoice attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Hotel expense. The expense will appear on the left pane under the “Expenses” section.

Expense | Nightly Lodging Expenses | Receipt Image | Available Receipts

Total Amount: USD 241.40 | Itemized: USD 241.40 | Remaining: USD 0.00

Expense Type: Hotel | Transaction Date: 10/03/2019 | Vendor: Hilton Hotels | City of Purchase: Baltimore, Maryland | Payment Type: Out of Pocket

Amount: 241.40 USD | Rate (ZAR=1 USD): 15.30743866 | Amount in ZAR: 3,695.22

Comment:

Expense Report Purpose Level 1: Technical Activities Societies | Expense Report Purpose Level 2: Industry Application Society | Expense Report Purpose Level 3: Chapter | Expense Report Purpose Level 4: (CHPTR) TA Societies - IAS

Entity: (30) S/C | Business Unit: (0340) Industry Applications | Cost Center: (01900) Committee & Other | CB Account #:

Save | Add Itemization | Attach Receipt | Cancel

The Hotel expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense also includes the itemizations defined previously. The expense appears both in USD and in your local currency.

IAS Annual Meeting Delete Report

Receipts Print / Email

Expenses	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	10/03/2019	Hotel Hilton Hotels, Baltimore, Maryland	ZAR 3,695.22 USD 241.40	ZAR 3,695.22
<input type="checkbox"/>	10/03/2019	Hotel	ZAR 3,199.26/USD	ZAR 3,199.26
<input type="checkbox"/>	10/03/2019	Hotel Tax	ZAR 495.96/USD 3	ZAR 495.96
<input type="checkbox"/>	08/31/2019	Airfare Cape Town, South Africa - Johannesburg	ZAR 10,863.93	ZAR 10,863.93
<input type="checkbox"/>	08/21/2019	Training Seminars IEEE IAS Annual Meeting	ZAR 7,311.12 USD 475.00	ZAR 7,311.12

Total Amount: USD 241.40 | Itemized: USD 241.40 | Remaining: USD 0.00

Expense Type: Transaction Date: Vendor: City of Purchase: Payment Type:

Amount: USD Rate (ZAR=1 USD) =Amount in ZAR

Comment:

Expense Report Purpose Level 1: Expense Report Purpose Level 2: Expense Report Purpose Level 3: Expense Report Purpose Level 4:

Entity: Business Unit: Cost Center: CB Account #:

TOTAL AMOUNT **ZAR 21,870.27** TOTAL REQUESTED **ZAR 21,870.27**

Part 5: Ground Transportation Reimbursement

Please follow the instructions below to submit your ground transportation reimbursement. Instructions are provided for both personal vehicle usage and claims using receipts.

5.1) Transportation Claim for Taxi

- Step 1:** Click on **“Taxi, Bus, Uber, etc.”** under **“02. Transportation”** which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

The screenshot shows the 'New Expense' interface. At the top, there is a search bar for 'Expense Type' and a link for 'Available Receipts'. Below this is a section for 'Recently Used Expense Types' with a grid of categories: Hotel, Training/Seminars, Airfare, Personal Car Mileage, and Taxi, Bus, Uber, etc. Underneath is the 'All Expense Types' grid, which lists various expense categories and their sub-items. A green arrow points to the 'Taxi, Bus, Uber, etc.' option under the '02. Transportation' category.

- Step 2:** Enter details for the Taxi expense as outlined and highlighted in yellow in the figure below. The Taxi Receipt used in the example below can be found in the Appendix.

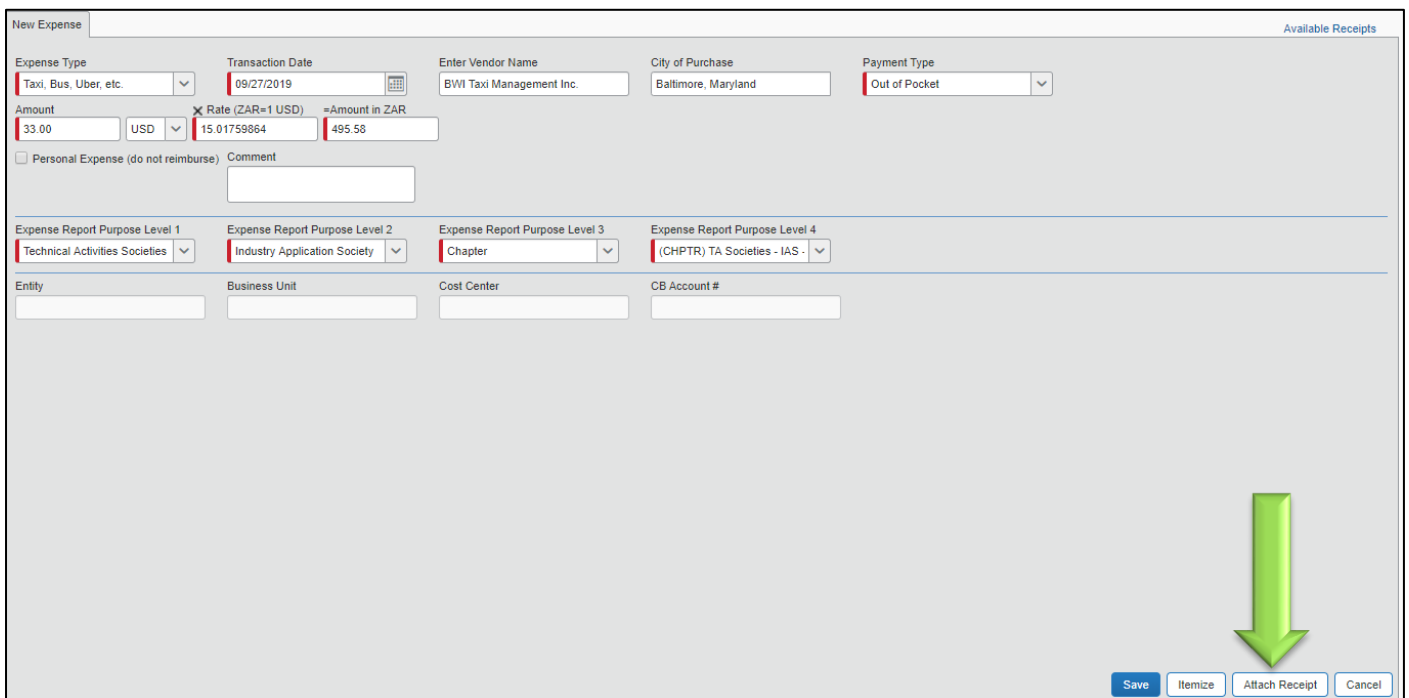
- Expense type: Type needs to be “Taxi, Bus, Uber, etc.”
- Transaction Date: Enter date the trip was made
- Enter Vendor Name: Enter the name of the vendor that provided the transportation service. In the example below, the vendor was “BWI Taxi Management Inc.”
- City of Purchase: Enter your city of purchase i.e. the city where the transportation service was rendered.
- Payment Type: “Out of Pocket”
- Amount: Select the currency indicated on the taxi receipt and enter the amount on the receipt.

Note: For Uber trips, the Uber receipt that is emailed to you can be used. The Uber receipt is normally emailed to the traveler immediately after their trip.

The screenshot shows the 'New Expense' form with several fields highlighted in yellow. The 'Expense Type' dropdown is set to 'Taxi, Bus, Uber, etc.'. The 'Transaction Date' is '09/27/2019'. The 'Enter Vendor Name' field contains 'BWI Taxi Management Inc'. The 'City of Purchase' field contains 'Baltimore, Maryland'. The 'Payment Type' dropdown is set to 'Out of Pocket'. The 'Amount' field is '33.00' with a currency dropdown set to 'USD'. The 'Rate (ZAR=1 USD)' is '15.01759864' and the calculated amount in ZAR is '495.58'. There are also sections for 'Expense Report Purpose Level 1-4' and 'Entity', 'Business Unit', 'Cost Center', and 'CB Account #'.

3. Step 3: Attach the Taxi Receipt

Once all the details of the travel expense is complete, Click “Attach Receipt” at the bottom right of the expense as indicated with the green arrow below.



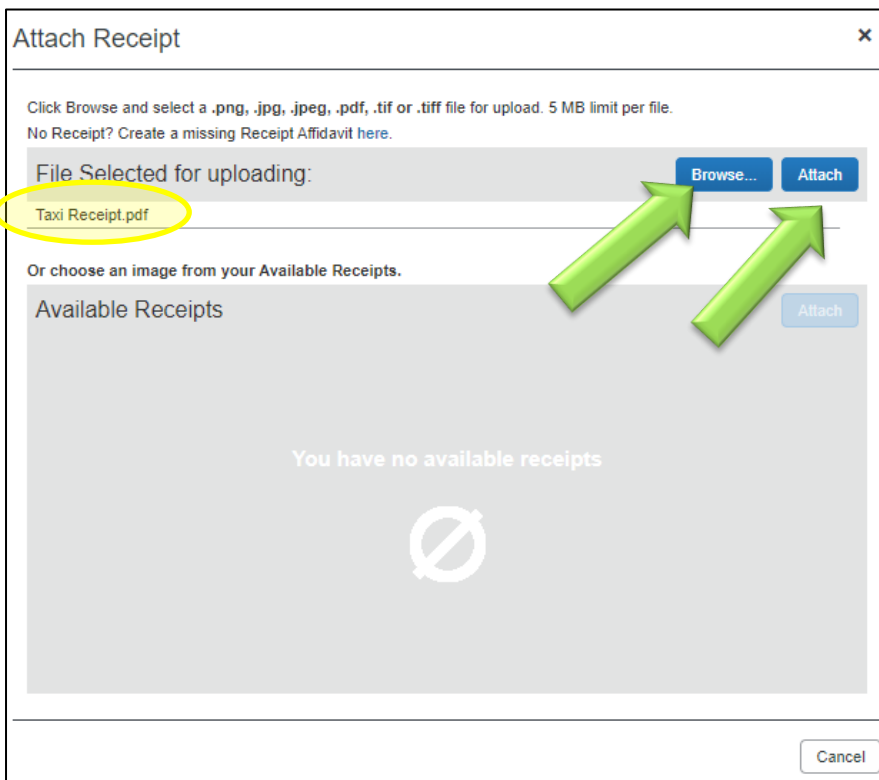
The screenshot shows the 'New Expense' form with the following details:

- Expense Type: Taxi, Bus, Uber, etc.
- Transaction Date: 09/27/2019
- Enter Vendor Name: BWI Taxi Management Inc.
- City of Purchase: Baltimore, Maryland
- Payment Type: Out of Pocket
- Amount: 33.00 USD
- Rate (ZAR=1 USD): 15.01759864
- =Amount in ZAR: 495.58
- Expense Report Purpose Level 1: Technical Activities Societies
- Expense Report Purpose Level 2: Industry Application Society
- Expense Report Purpose Level 3: Chapter
- Expense Report Purpose Level 4: (CHPTR) TA Societies - IAS
- Entity, Business Unit, Cost Center, and CB Account # fields are empty.

A green arrow points to the 'Attach Receipt' button at the bottom right of the form.

4. Step 4: Browse and attach the Taxi Receipt

The window below will open. First click “Browse” to find and open the Taxi Receipt to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the invoice. In the example below, the document to be uploaded is “Taxi Receipt.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.



The 'Attach Receipt' dialog box contains the following information:

- Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.
- No Receipt? Create a missing Receipt Affidavit here.
- File Selected for uploading: Taxi Receipt.pdf (highlighted with a yellow circle)
- Buttons: Browse... and Attach
- Or choose an image from your Available Receipts.
- Available Receipts section: You have no available receipts (with a crossed-out circle icon)
- Button: Attach
- Button: Cancel

Two green arrows point to the 'Browse...' and 'Attach' buttons.

5. Step 5: Save the Taxi Expense

Once the Taxi Receipt is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Hotel invoice attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Taxi expense. The expense will appear on the left pane under the “Expenses” section.

The screenshot shows the 'New Expense' form with the following details:

- Expense Type:** Taxi, Bus, Uber, etc.
- Transaction Date:** 09/27/2019
- Enter Vendor Name:** BVI Taxi Management Inc.
- City of Purchase:** Baltimore, Maryland
- Payment Type:** Out of Pocket
- Amount:** 33.00 USD
- Rate (ZAR=1 USD):** 15.01759864
- =Amount in ZAR:** 495.58
- Expense Report Purpose Level 1:** Technical Activities Societies
- Expense Report Purpose Level 2:** Industry Application Society
- Expense Report Purpose Level 3:** Chapter
- Expense Report Purpose Level 4:** (CHPTR) TA Societies - IAS
- Entity:** (Empty)
- Business Unit:** (Empty)
- Cost Center:** (Empty)
- CB Account #:** (Empty)

Buttons at the bottom: Save, Itemize, Attach Receipt, Cancel.

The Taxi expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.

IAS Annual Meeting

Click to edit report name and other details

Receipts Print / Email

Expenses	Date	Expense Type	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	10/03/2019	Hotel Hilton Hotels, Baltimore, Marylan	ZAR 3,695.22 USD 241.40	ZAR 3,695.22
<input type="checkbox"/>	09/27/2019	Taxi, Bus, Uber, etc. BVI Taxi Management Inc. Balli	ZAR 495.58 USD 33.00	ZAR 495.58
<input type="checkbox"/>	08/31/2019	Airfare Emirates Airlines, Johannesburg	ZAR 10,863.93 USD 723.51	ZAR 10,863.93
<input type="checkbox"/>	08/21/2019	Training/Seminars IEEE IAS Annual Meeting	ZAR 7,311.12 USD 475.00	ZAR 7,311.12

New Expense

Expense Type

Recently Used Expense Types

All Expense Types	01. Travel Expenses	02. Transportation	03. Meals	04. Office Expenses	07. Fees
Hotel	Car Rental	Tolls/Road Charges	Supplies/Postage/Shipping/Printing/etc.	Currency Exchange Fees	
Laundry	Fuel Charges - Rental Car Only	Train	06. Communications	08. Other	
02. Transportation	Parking	03. Meals	Internet/Online Fees	Dues/Membership	
Airfare	Personal Car Mileage	Individual Meals	07. Fees	Miscellaneous	
Airline Fees	Taxi, Bus, Uber, etc.	Meals with Guests	Agency Booking Fees	Subscriptions	
				..08. Other	
				Tips/Gratuities	
				Training/Seminars	

5.2) Personal Vehicle Usage

The instructions below pertain to usage of your own vehicle. The reimbursement is calculated based on your travel distance.

- Step 1:** Click on **“Personal Car Mileage”** under **“02. Transportation”** which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

The screenshot shows the 'New Expense' form with the 'Expense Type' dropdown menu open. The '02. Transportation' category is expanded, and 'Personal Car Mileage' is highlighted with a green arrow. Other categories visible include '01. Travel Expenses', '03. Meals', '04. Office Expenses', '06. Communications', and '07. Fees'.

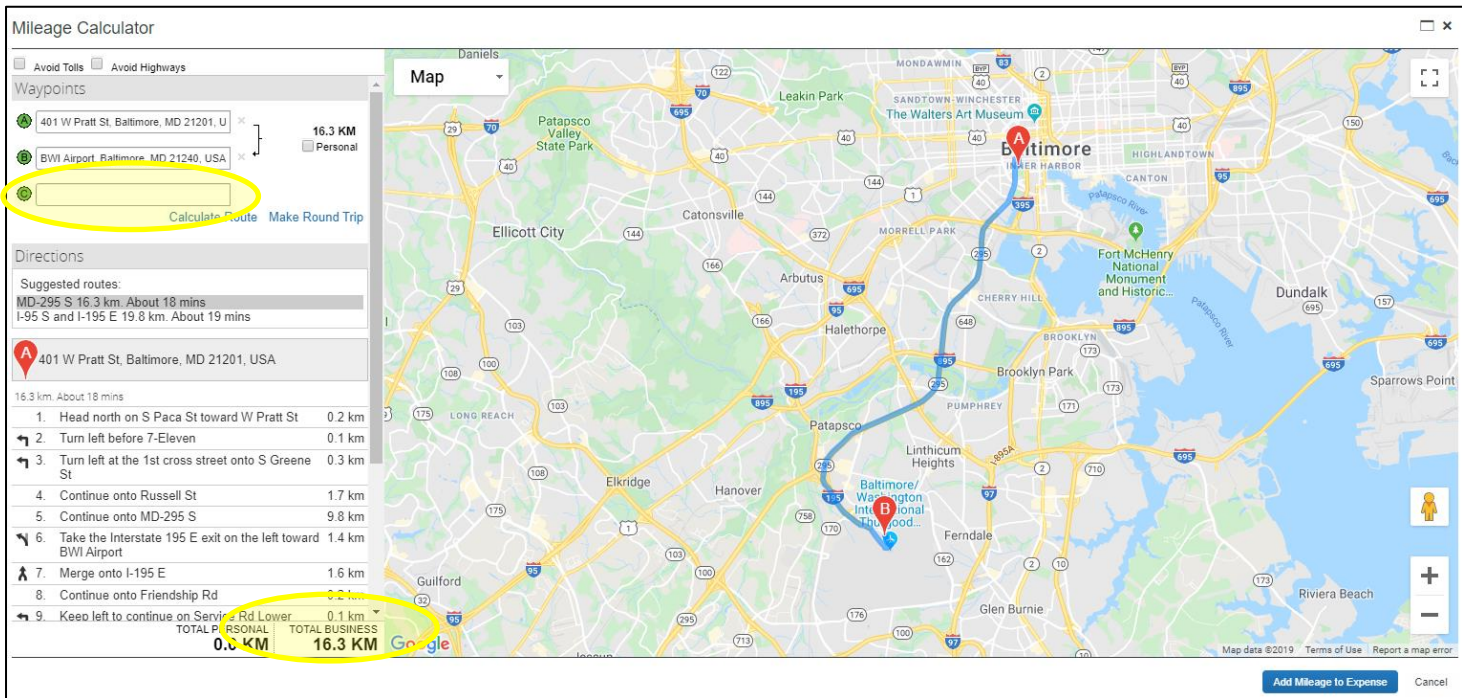
- Step 2:** Enter details for the Personal car mileage as outlined and highlighted in yellow in the figure below.

- Expense type: Type needs to be **“Personal Car Mileage”**
- Transaction Date: Enter date the trip was made
- Purpose of the trip: Enter the reason the trip was made. In the example below, the reason is travel from **“Hotel to Airport”**
- From Location: Enter the address or name of the location you departed from
- To Location: Enter the address or name of the location you travelled to

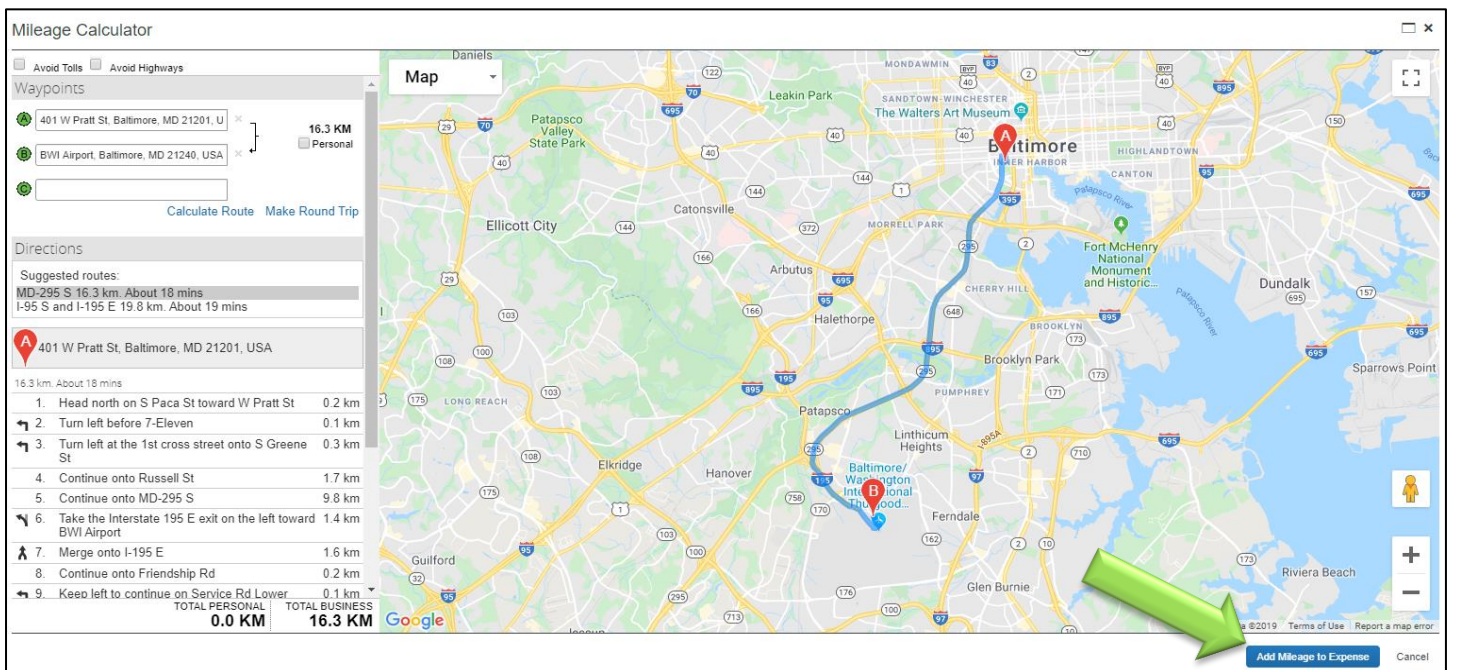
Once you have entered the details above, click on the **“Mileage Calculator”** link at the bottom right as indicated with the green arrow.

The screenshot shows the 'New Expense' form with several fields highlighted in yellow: 'Expense Type' (Personal Car Mileage), 'Transaction Date' (09/26/2019), 'Purpose of the Trip' (Travel Hotel to Airport), 'From Location' (401 West Pratt Street, Baltimore, US), and 'To Location' (BWI Airport, Baltimore, USA). A green arrow points to the 'Mileage Calculator' link at the bottom right.

The Mileage Calculator window as depicted in the figure below will open with the destinations indicated in the previous page. You can edit the locations on the mileage calculator if needed or add additional destinations. In the figure below, the additional destination can be added under waypoints as “C” indicated with the yellow circle. You also have the option to make a round trip by clicking on the “Make Round Trip” option. The total business distance is indicated at the bottom of the page.



Once all your locations have been added and you are satisfied with the trip, you can click “Add Mileage to Expense” at the bottom right of the page as indicated with the green arrow.



3. Step 3: Save the Mileage Expense

Once the Mileage expense is added, distance and amount will be automatically populated under the mileage expense as indicated with the yellow circle below. The amount will be reflected in your local currency. Click "Save" at the bottom right of the page to add the mileage expense to your expense report.

The screenshot shows the 'New Expense' form with the following details:

- Expense Type:** Personal Car Mileage
- Transaction Date:** 09/26/2019
- Purpose of the Trip:** Travel Hotel to Airport
- From Location:** 401 W Pratt St. Baltimore, MD 2120
- To Location:** BWI Airport, Baltimore, MD 21240, L
- Payment Type:** Out of Pocket
- Distance - Amount:** 16 miles, 81.89 ZAR (highlighted with a yellow circle)
- Expense Report Purpose Level 1:** Technical Activities Societies
- Expense Report Purpose Level 2:** Industry Application Society
- Expense Report Purpose Level 3:** Chapter
- Expense Report Purpose Level 4:** (CHPTR) TA Societies - IAS
- Entity:** (empty)
- Business Unit:** (empty)
- Cost Center:** (empty)
- CB Account #:** (empty)
- Mileage Calculator:** (button)
- Buttons:** Save, Attach Receipt, Cancel

The Mileage expense will now appear under the "Expenses" section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.

The screenshot shows the 'IAS Annual Meeting' expense report with the following table of expenses:

Date	Expense Type	Amount	Requested
10/03/2019	Hotel Hilton Hotels, Baltimore, Maryland	ZAR 3,695.22 USD 241.40	ZAR 3,695.22
09/27/2019	Taxi, Bus, Uber, etc. BWI Taxi Management Inc. Balli	ZAR 495.58 USD 33.00	ZAR 495.58
09/26/2019	Personal Car Mileage	ZAR 81.89	ZAR 81.89
09/21/2019	Airfare Emirates Airlines, Johannesburg	ZAR 10,863.83 USD 683.93	ZAR 10,863.83
08/21/2019	Training/Seminars IEEE IAS Annual Meeting	ZAR 7,311.12 USD 475.00	ZAR 7,311.12

The 'Personal Car Mileage' entry for 09/26/2019 is highlighted in yellow in the original image.

Part 6: Meals Reimbursement

6.1) Individual Meal Reimbursement

- Step 1:** Click on **“Individual Meals”** under **“03. Meals”** which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

The screenshot shows the 'New Expense' form with a search bar and a list of expense types. Under the '03. Meals' category, 'Individual Meals' is highlighted with a green arrow. Other categories include 01. Travel Expenses, 02. Transportation, 04. Office Expenses, 06. Communications, 07. Fees, and 08. Other.

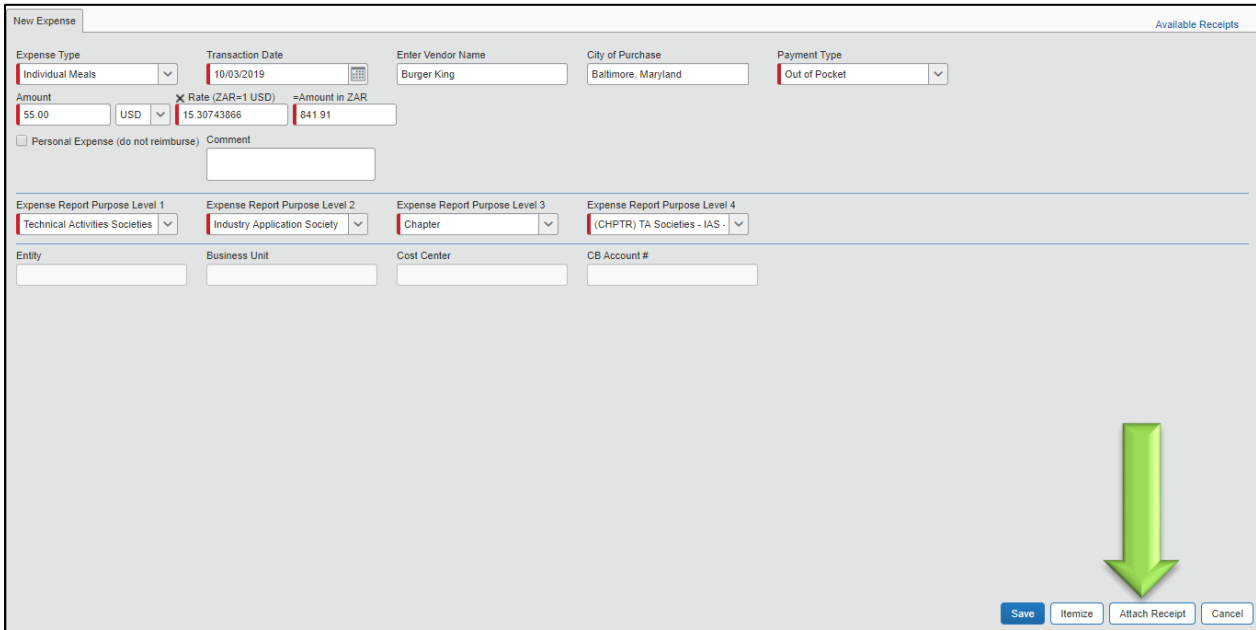
- Step 2:** Enter details for the Meal expense as outlined and highlighted in yellow in the figure below.

- Expense type: Type needs to be “Individual Meals”
- Transaction Date: Enter date the meal was purchased
- Enter Vendor Name: Enter the name of the restaurant/shop that the food was purchased from. In the example below, the vendor was “Burger King.”
- City of Purchase: Enter your city of purchase i.e. the city where the meal was purchased from.
- Payment Type: “Out of Pocket”
- Amount: Enter the total amount on the meal receipt.

The screenshot shows the 'New Expense' form with several fields highlighted in yellow. The 'Expense Type' is set to 'Individual Meals', the 'Transaction Date' is '10/03/2019', the 'Enter Vendor Name' is 'Burger King', the 'City of Purchase' is 'Baltimore, Maryland', and the 'Payment Type' is 'Out of Pocket'. The 'Amount' field is set to '55.00' USD, which is converted to '841.91' ZAR at a rate of 15.30743866. The form also includes sections for 'Expense Report Purpose Level' and 'Entity'.

3. Step 3: Attach the Meal Receipt

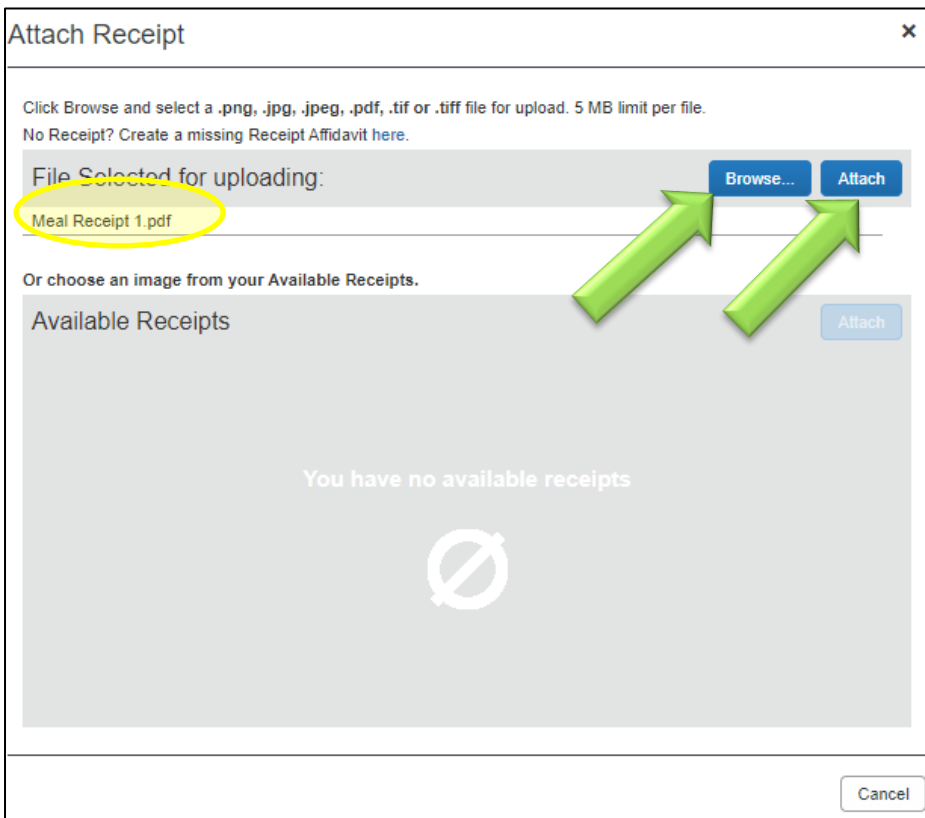
Once all the details of the Meal expense is complete, Click “Attach Receipt” at the bottom right of the expense as indicated with the green arrow below.



The screenshot shows the 'New Expense' form with the following fields filled out: Expense Type: Individual Meals; Transaction Date: 10/03/2019; Enter Vendor Name: Burger King; City of Purchase: Baltimore, Maryland; Payment Type: Out of Pocket; Amount: 55.00 USD; Rate (ZAR=1 USD): 15.30743866; Amount in ZAR: 841.91. The form also includes sections for Expense Report Purpose Levels 1-4, Entity, Business Unit, Cost Center, and CB Account #. A large green arrow points to the 'Attach Receipt' button at the bottom right of the form.

4. Step 4: Browse and attach the Meal Receipt

The window below will open. First click “Browse” to find and open the Meal Receipt to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the receipt. In the example below, the document to be uploaded is “Meal Receipt 1.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.



The screenshot shows the 'Attach Receipt' dialog box. It contains the following text: 'Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file. No Receipt? Create a missing Receipt Affidavit here.' Below this is a section titled 'File Selected for uploading:' with a text input field containing 'Meal Receipt 1.pdf'. To the right of this field are two buttons: 'Browse...' and 'Attach'. Below this is another section titled 'Or choose an image from your Available Receipts.' with a text input field and an 'Attach' button. The 'Available Receipts' section is currently empty, displaying 'You have no available receipts' and a large 'X' icon. A 'Cancel' button is located at the bottom right of the dialog box. Two green arrows point to the 'Browse...' and 'Attach' buttons.

5. Step 5: Save the Meal Expense

Once the Meal Receipt is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Meal Receipt attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Meal expense. The expense will appear on the left pane under the “Expenses” section.

The screenshot shows the 'New Expense' form with the following fields:

- Expense Type:** Individual Meals
- Transaction Date:** 10/03/2019
- Enter Vendor Name:** Burger King
- City of Purchase:** Baltimore, Maryland
- Payment Type:** Out of Pocket
- Amount:** 55.00 USD
- Rate (ZAR=1 USD):** 15.30743886
- Amount in ZAR:** 841.91
- Expense Report Purpose Level 1:** Technical Activities Societies
- Expense Report Purpose Level 2:** Industry Application Society
- Expense Report Purpose Level 3:** Chapter
- Expense Report Purpose Level 4:** (CHPTR) TA Societies - IAS
- Entity:**
- Business Unit:**
- Cost Center:**
- CB Account #:**

Buttons at the bottom right: Save, Itemize, Attach Receipt, Cancel.

The Meal expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.

IAS Annual Meeting

+ New Expense Import Expenses Details Receipts Print / Email

Expenses

Date	Expense Type	Amount	Requested
10/03/2019	Hotel Hilton Hotels, Baltimore, Maryland	ZAR 3,695.22 USD 241.40	ZAR 3,695.22
10/03/2019	Individual Meals Burger King, Baltimore, Maryland	ZAR 841.91 USD 55.00	ZAR 841.91
09/27/2019	Taxi, Bus, Uber, etc. BWN Taxi Management Inc., Bali	ZAR 495.58 USD 33.00	ZAR 495.58
09/26/2019	Personal Car Mileage	ZAR 81.89	ZAR 81.89
08/31/2019	Airfare Emirates Airlines, Johannesburg	ZAR 10,863.93	ZAR 10,863.93
08/21/2019	Training/Seminars IEEE IAS Annual Meeting	ZAR 7,311.12 USD 475.00	ZAR 7,311.12

New Expense

Expense Type

Recently Used Expense Types

Individual Meals	Personal Car Mileage	Taxi, Bus, Uber, etc.	Hotel	Training/Seminars
01. Travel Expenses	...02. Transportation	...02. Transportation	04. Office Expenses	...07. Fees
Hotel	Car Rental	Tolls/Road Charges	Supplies/Postage/Shipping/Printing/etc.	Currency Exchange Fees
Laundry	Fuel Charges - Rental Car Only	Train	06. Communications	08. Other
02. Transportation	Parking	03. Meals	Internet/Online Fees	Dues/Membership
Airfare	Personal Car Mileage	Individual Meals	07. Fees	Miscellaneous
Airline Fees	Taxi, Bus, Uber, etc.	Meals with Guests	Agency Booking Fees	Subscriptions
				...08. Other
				Tips/Gratuities
				Training/Seminars

6.2) Meals with Guests Reimbursement

- Step 1:** Click on “Meals with Guests” under “03. Meals” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

The screenshot shows the 'New Expense' form with the 'Expense Type' dropdown menu open. The 'All Expense Types' list is visible, and 'Meals with Guests' is highlighted under the '03. Meals' category. A green arrow points to this option.

- Step 2:** Enter details for the Meal expense as outlined and highlighted in yellow in the figure below.

- Expense type: Type needs to be “Meals with Guests”
- Transaction Date: Enter date the meal was purchased
- Enter Vendor Name: Enter the name of the restaurant/shop that the food was purchased from. In the example below, the vendor was “Burger King.”
- City of Purchase: Enter your city of purchase i.e. the city where the meal was purchased from.
- Payment Type: “Out of Pocket”
- Amount: Enter the total amount on the meal receipt.
- Attendees: Enter the names of attendees. Click on “New Attendee” to enter the details of each attendee.

The screenshot shows the 'New Expense' form with several fields highlighted in yellow: 'Expense Type' (Meals with Guests), 'Transaction Date' (10/03/2019), 'Enter Vendor Name' (Burger King), 'City of Purchase' (Baltimore, Maryland), and 'Payment Type' (Out of Pocket). The 'Attendees' section is also visible, showing a table with one attendee: 'Doe, John H' (Employee) for an amount of USD 155.00. A green arrow points to the 'Attendees' section.

- The name of the person submitting the expense report automatically appears on the attendee list. For each new attendee, select the “Attendee Type”, Last name of the attendee (compulsory), first name of the attendee (optional), attendee title (optional) and Company name (compulsory).
- Click “Save & Add Another” to add more attendees.
- Click “Save” once all the attendees have been added.
- The full list of attendees will appear under attendees once complete.
- The bill will be automatically split amongst all the attendees.

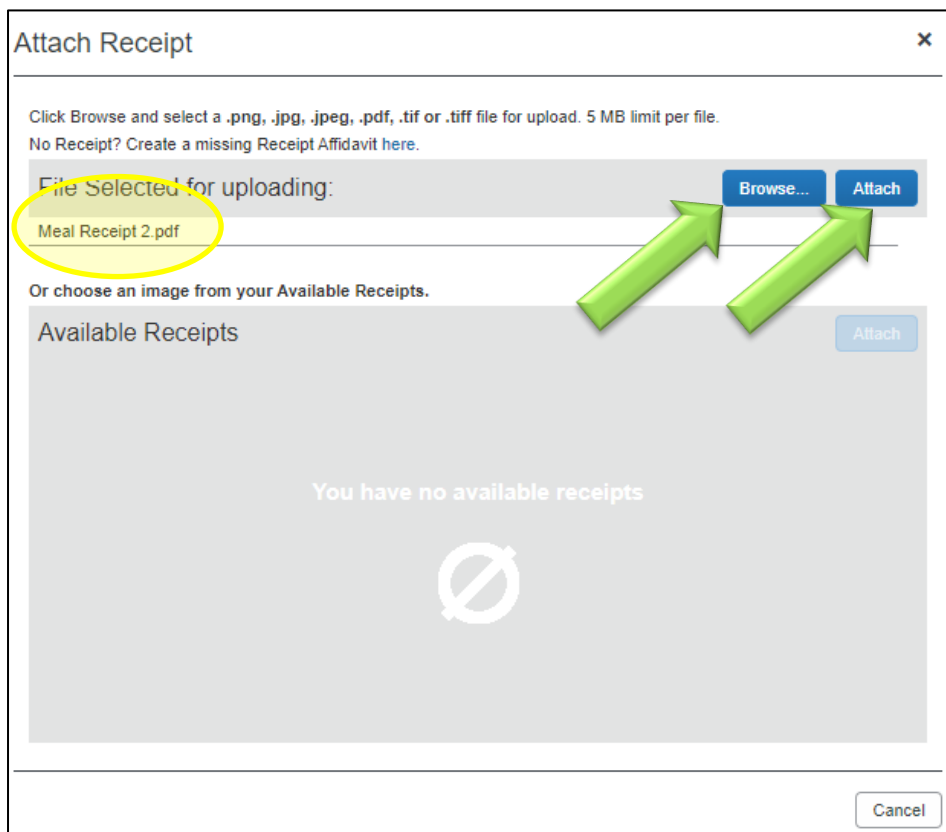
3. Step 3: Attach the Meal Receipt

Once all the details of the Meal expense is complete, Click “Attach Receipt” at the bottom right of the expense as indicated with the green arrow below.

Attendee Name	Attendee Title	Company	Attendee Type	Amount
Jones, Jane	Ms	PLP Electric	Business Guest	USD 77.50
Doe, John H			Employee	USD 77.50

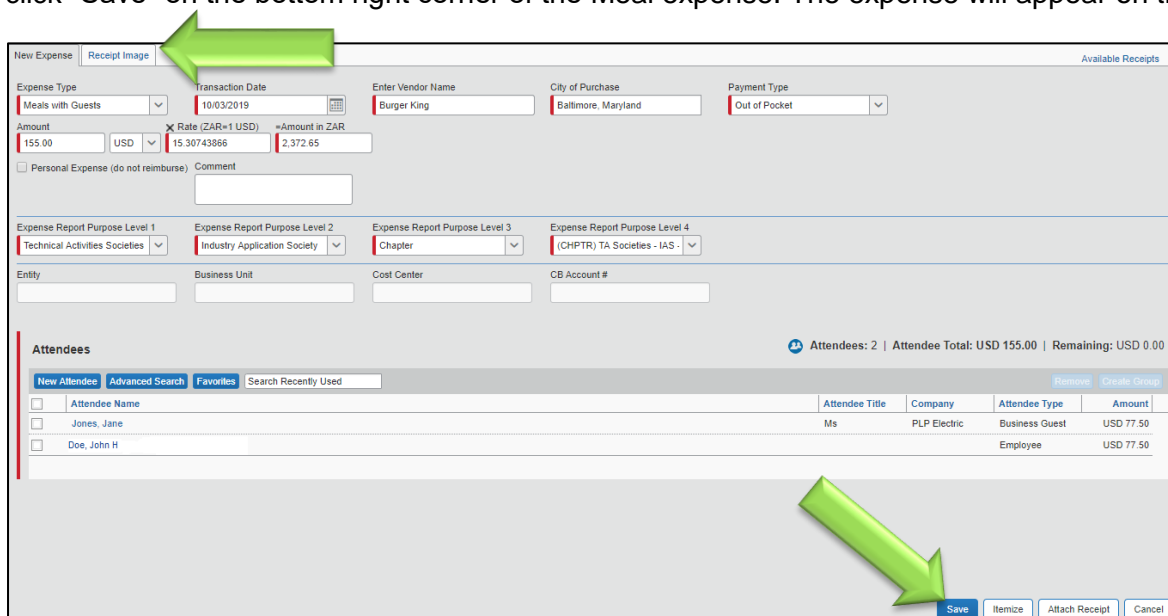
4. Step 4: Browse and attach the Meal Receipt

The window below will open. First click “Browse” to find and open the Meal Receipt to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the receipt. In the example below, the document to be uploaded is “Meal Receipt 2.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.



5. Step 5: Save the Meal Expense

Once the Meal Receipt is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Meal Receipt attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Meal expense. The expense will appear on the left pane



Part 7: Attach Signed Expense Report (CMD)

All CMD travel expenses need to include an expense report signed and approved by either the CMD Chair (Lesley Arakkal) or the CMD Director (Peter Magyar). The signed expense report will need to be uploaded on the Concur platform as part of the expense report. Please follow the instructions below to upload the expense report.

No CMD Reimbursements will be Apporved without the signed Expense Report attached.

- Step 1:** Click on “Receipts” which can be found on the top left hand pane as indicated in the figure below. A dropdown menu will appear once you click “Receipts.”

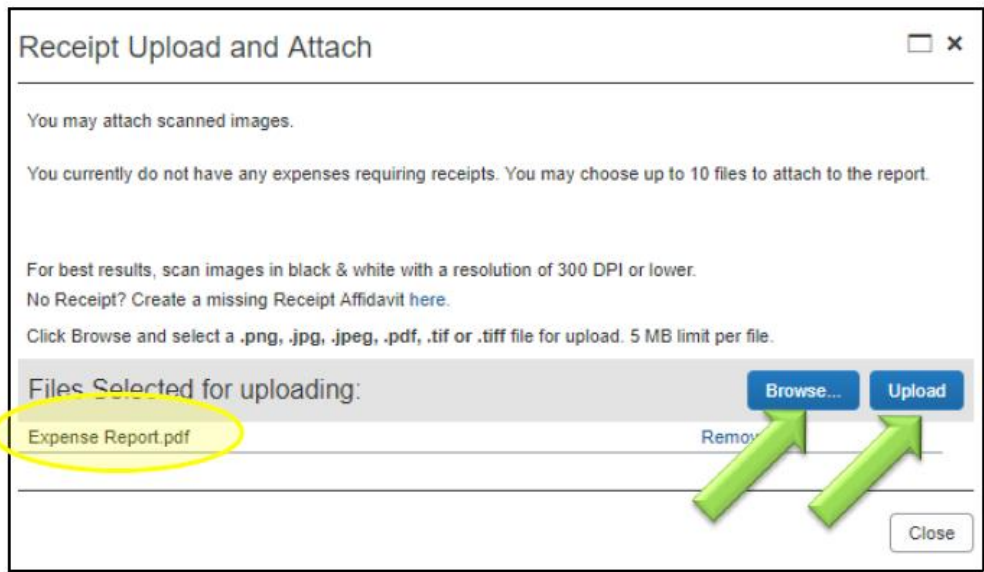
The screenshot shows the Concur interface for the IAS Annual Meeting. At the top, there are navigation buttons: '+ New Expense', 'Import Expenses', 'Details', 'Receipts', and 'Print / Email'. A green arrow points to the 'Receipts' button. Below this, there is a table of expenses with columns for Date, Expense Type, Amount, and Requested. To the right, there is a 'New Expense' form with an 'Expense Type' dropdown and a list of 'Recently Used Expense Types' and 'All Expense Types'.

Date	Expense Type	Amount	Requested
10/03/2019	Hotel Hilton Hotels, Baltimore, Marylan	ZAR 3,695.22 USD 241.40	ZAR 3,695.22 USD 241.40
10/03/2019	Individual Meals Burger King, Baltimore, Marylan	ZAR 841.91 USD 55.00	ZAR 841.91 USD 55.00
10/03/2019	Meals with Guests Burger King, Baltimore, Marylan	ZAR 2,372.65 USD 155.00	ZAR 2,372.65 USD 155.00
09/27/2019	Taxi, Bus, Uber, etc. BWI Taxi Management Inc., Balti	ZAR 495.58 USD 33.00	ZAR 495.58 USD 33.00
09/26/2019	Personal Car Mileage	ZAR 81.89	ZAR 81.89
08/31/2019	Airfare Emirates Airlines, Johannesburg	ZAR 10,863.93	ZAR 10,863.93
08/21/2019	Training/Seminars IEEE IAS Annual Meeting	ZAR 7,311.12 USD 475.00	ZAR 7,311.12 USD 475.00

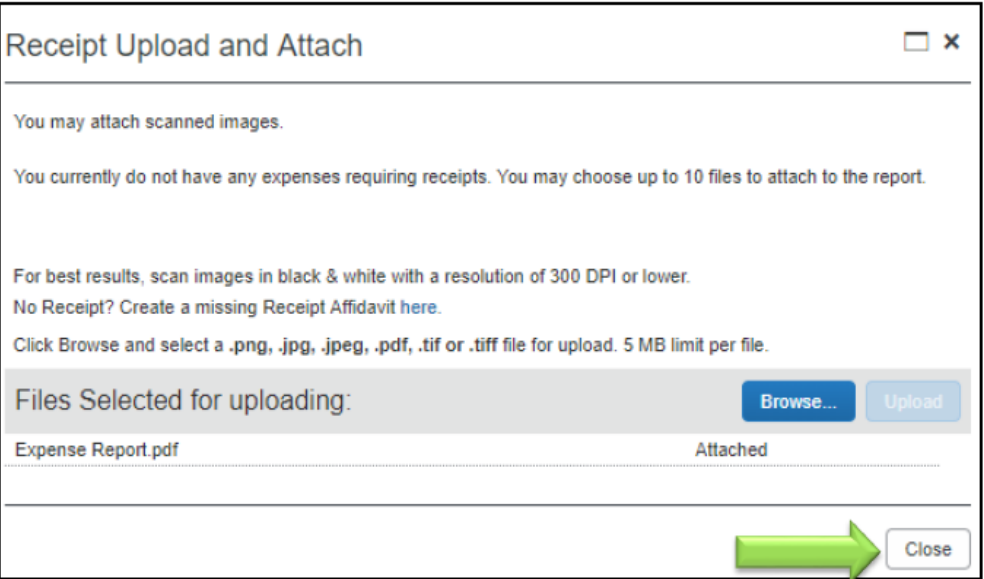
- Step 2:** The dropdown menu indicated in the figure below will appear once you click on “Receipts.” Please select “Attach Receipt Images” from the dropdown menu. The option is highlighted in yellow in the figure below.

The screenshot shows the Concur interface for the IAS Annual Meeting. The 'Receipts' dropdown menu is open, showing options: 'Receipts Required', 'View Receipts in new window', 'View Receipts in current window', 'Attach Receipt Images' (highlighted in yellow), 'View Available Receipts', 'Missing Receipt Affidavit', and 'Delete Receipt Images'. The background shows the same expense table as in the previous screenshot.

3. **Step 3:** The Receipt Upload and Attach window will pop out once you click on “Attach Receipt Images.” Click “Browse” to find and open your signed expense report. Once the Expense report is listed under “Files Selected for uploading”, click on “upload.” In the example below, “Expense Report.pdf” is the file that was uploaded.



4. **Step 4:** Once the Expense Report is uploaded, click “close” to close the window.



Note: The example of a signed expense report can be found at the end of this document in the Appendix.

Part 8: Submit the Expense Report

Once all the expenses are listed on the left hand pane of your expense report, you can proceed to submit your expense report. Please check and ensure that the total at the bottom of the page is the correct amount to be reimbursed to you. You can then submit your expense report by clicking on the orange “Submit Report” button at the top right corner of the expense report.

IAS Annual Meeting

[Delete Report](#)
[Submit Report](#)

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

Expenses	Date	Expense Type	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	10/03/2019	Hotel Hilton Hotels, Baltimore, Maryland	ZAR 3,695.22 USD 341.40	ZAR 3,695.22
<input type="checkbox"/>	10/03/2019	Individual Meals Burger King, Baltimore, Maryland	ZAR 841.91 USD 55.00	ZAR 841.91
<input type="checkbox"/>	10/03/2019	Meals with Guests Burger King, Baltimore, Maryland	ZAR 2,372.65 USD 155.00	ZAR 2,372.65
<input type="checkbox"/>	09/27/2019	Taxi, Bus, Uber, etc. BWI Taxi Management Inc., Balli	ZAR 495.58 USD 33.00	ZAR 495.58
<input type="checkbox"/>	09/26/2019	Personal Car Mileage	ZAR 81.89	ZAR 81.89
<input type="checkbox"/>	08/31/2019	Airfare Emirates Airlines, Johannesburg	ZAR 10,863.93	ZAR 10,863.93
<input type="checkbox"/>	08/21/2019	Training/Seminars IEEE IAS Annual Meeting	ZAR 7,311.12 USD 475.00	ZAR 7,311.12

TOTAL AMOUNT	TOTAL REQUESTED
ZAR 25,662.30	ZAR 25,662.30

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	Individual Meals	Personal Car Mileage	Taxi, Bus, Uber, etc.	Hotel
-------------------	------------------	----------------------	-----------------------	-------

All Expense Types

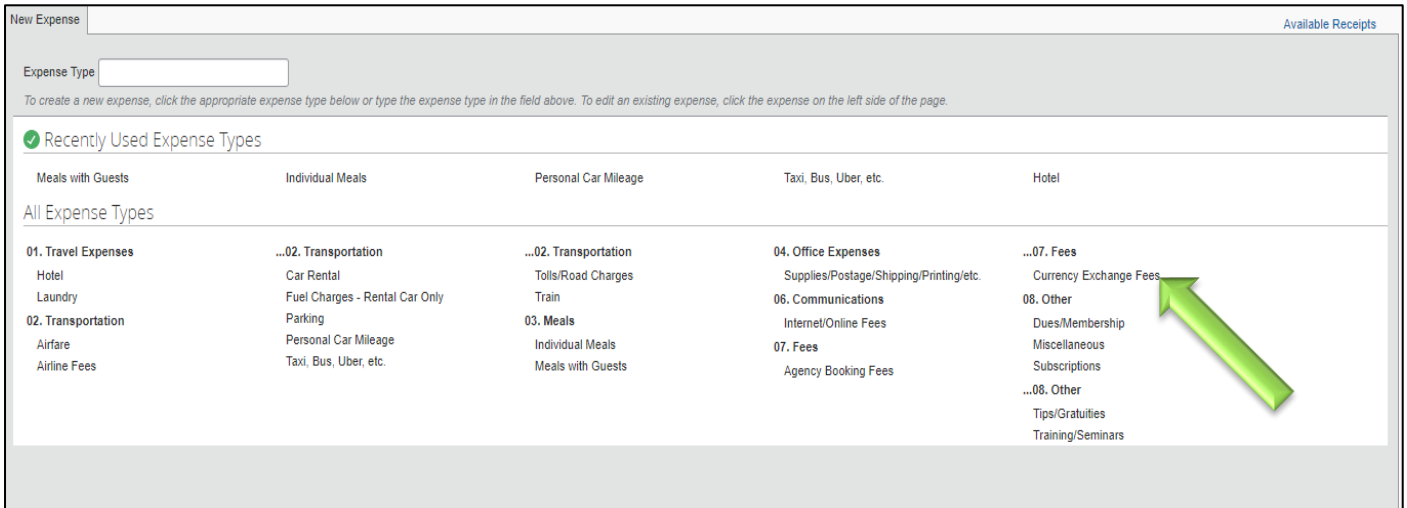
01. Travel Expenses	...02. Transportation	...02. Transportation	04. Office Expenses	...07. Fees
Hotel	Car Rental	Tolls/Road Charges	Supplies/Postage/Shipping/Printing/etc.	Currency Exchange Fees
Laundry	Fuel Charges - Rental Car Only	Train	06. Communications	08. Other
02. Transportation	Parking	03. Meals	Internet/Online Fees	Dues/Membership
Airfare	Personal Car Mileage	Individual Meals	07. Fees	Miscellaneous
Airline Fees	Taxi, Bus, Uber, etc.	Meals with Guests	Agency Booking Fees	Subscriptions
				...08. Other
				Tips/Gratuities
				Training/Seminars

Part 9: Additional Information

Currency Conversion Fee: If the currency conversion in Concur differs from the amount charged from the amount charged to your credit card, you are entitled to add a separate lump sum line item as “Currency Exchange Fees” to your expense report. No receipt documentation is required when submitting a line item for “Currency Exchange Fees.”

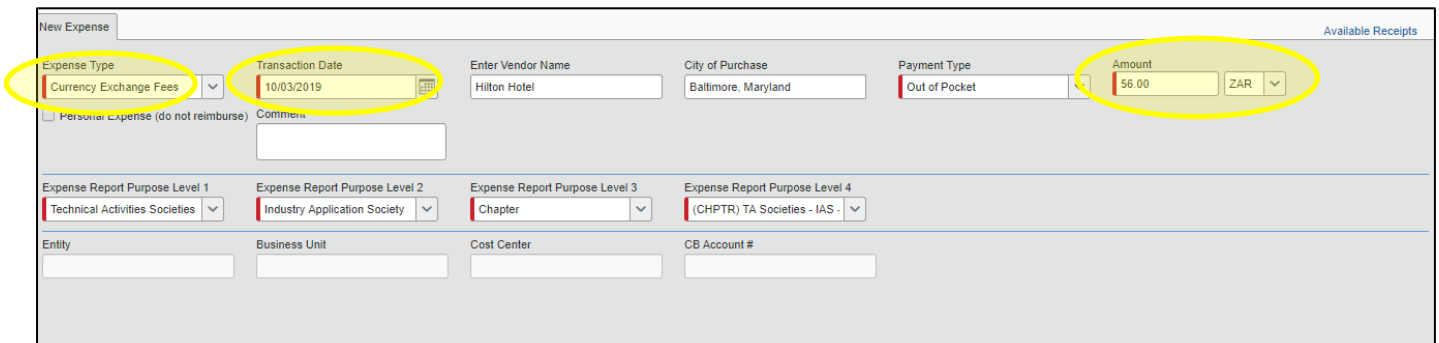
Please follow the instructions below to claim “Currency Exchange Fees.”

- Step 1:** Click on “**Currency Exchange Fees**” under “**07. Fees**” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.



The screenshot shows the 'New Expense' form with the 'All Expense Types' list. The list is organized into columns: 'Meals with Guests', 'Individual Meals', 'Personal Car Mileage', 'Taxi, Bus, Uber, etc.', and 'Hotel'. Under the '07. Fees' category, 'Currency Exchange Fees' is highlighted with a green arrow.

- Step 2:** Enter the details below for the Currency Exchange Fees
 - Transaction Date: Enter the date of the transaction
 - Enter Vendor Name: Enter the name of the Vendor (Optional)
 - City of Purchase: Enter the details of the city of purchase (Optional)
 - Select the currency to be used.
 - Enter the amount: Enter the difference between the amount indicated on your credit card statement and the amount listed on the expense report for the respective transaction.



The screenshot shows the 'New Expense' form with several fields highlighted in yellow. The 'Expense Type' dropdown is set to 'Currency Exchange Fees'. The 'Transaction Date' is '10/03/2019'. The 'Vendor Name' is 'Hilton Hotel', the 'City of Purchase' is 'Baltimore, Maryland', and the 'Payment Type' is 'Out of Pocket'. The 'Amount' is '56.00' and the currency is 'ZAR'.

Finally, Click on “Save” at the bottom right of the expense to add the “Currency Exchange Fees” as part of the expense report.

Contact Details for Assistance: The information below provides contact information for SAP Concur's Support Desk.

1. Online Submission - Available 24/7/365

- Users can enter the end-user support portal by logging into SAP Concur with your existing credentials and clicking on the **Contact Support** option in the Help menu in the upper right-hand corner of SAP Concur. Once in the end-user support portal, click "+Create a Case."
- Please use the Contact Support option noted above to check status of, update, and open new cases online. Cases can be created 24/7/365.

2. Live Chat - Available 24/7/365

- At this time, support is provided in English only.
- To get to Chat, click on the **Contact Support** option within the Help menu of your SAP Concur Program and then "Chat with support."

3. Phone Support - Available in English 24/7/365

- US, Canada and Puerto Rico – 1 866 793 4040
- To access the complete list of contact telephone numbers depending on country from which you are calling:
 - Click the **Contact Support** option within the Help menu of your SAP Concur Program to access the end-user support portal.
 - Click the "View global phone numbers" link in the "Support hotline" box on the right side of the screen.
 - Select the telephone number that corresponds to the country from which you are calling.

4. Or contact IEEE's project team at concurfeedback@ieee.org for general assistance or questions regarding Concur.

Part 10: Western Union Registration (Other Currencies)

Note: This section is only for recipients who reside in a country which does not make use of any of the currencies listed below:

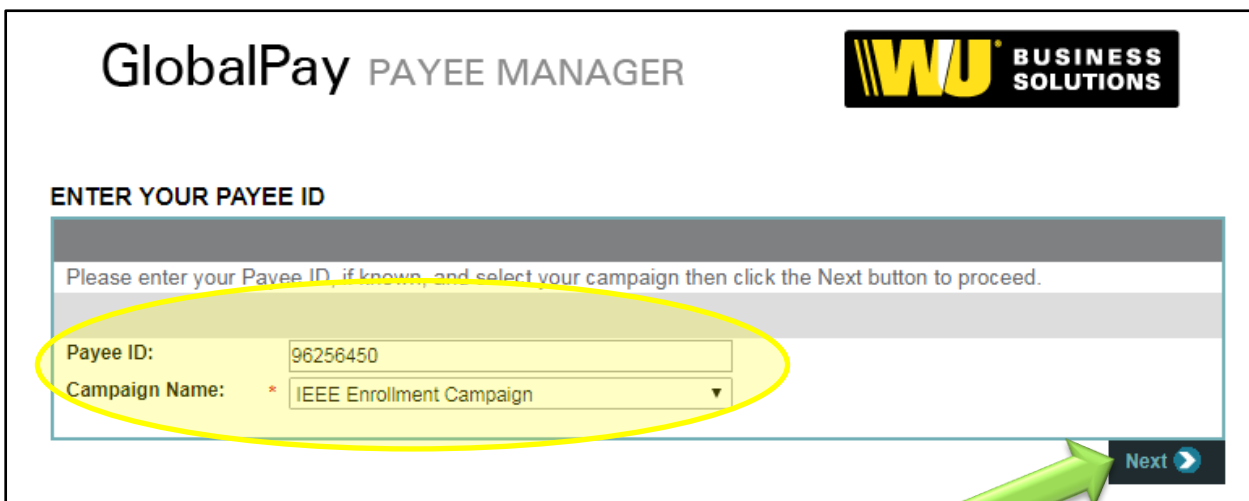
- U.S. dollar (USD)
- Euro (EUR)
- Canadian dollar (CAD)
- Indian rupee (INR)


If your currency is not listed above, you need to register with Western Union for your payment to be processed.

Step 1: Click on the following link to open the Western Union Registration site:

<https://payee.globalpay.westernunion.com/PayeeManager/BeneficiaryEnrollment/SpecifyPayeeID.aspx?id=F1810E0E0077373DA43DBACFF6679AAB>

Step 2: Enter your IEEE number for Payee ID and select “IEEE Enrollment Campaign” for Campaign Name. Click Next at the bottom right of the page to proceed with registration.




GlobalPay PAYEE MANAGER 

ENTER YOUR PAYEE ID

Please enter your Payee ID, if known, and select your campaign then click the Next button to proceed.

Payee ID:

Campaign Name: *

Next 

Step 3: Complete all your details for the beneficiary enrollment. Enter your name, address, city, country, province/state, postal code and phone number. Click Next to proceed.

IEEE
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for Humanity

WU BUSINESS SOLUTIONS

BENEFICIARY ENROLLMENT

1 • 2 • 3 • 4 • 5 • 6

Please provide contact information for the business or individual represented in this enrollment.

Beneficiary Contact Information

Payee ID: 96256450

Individual's Name: * John Doe

Address Line 1: * 55 Acorn Avenue

Address Line 2:

City: * Montevideo

Country: * Uruguay

State/Province: * Canelones

Postal Code: * 11300

Phone Number: * +598 2628 7777

* Required Information

Next >

Step 4: Enter your first name, last name, email address and phone number. Click Next to proceed once completed. Click Next to proceed.

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BENEFICIARY ENROLLMENT

1 • 2 • 3 • 4 • 5 • 6

< Back

Please provide contact information for the person completing this enrollment.

Enrollee Contact Information

First Name: * John

Last Name: * Doe

E-mail: * john.doe@gmail.com

Confirm E-mail: * john.doe@gmail.com

Phone Number: * +598 2628 7777

* Required Information

Next >

Step 5: Enter a new username and password for your Western Union profile. Choose a security question and answer in case you forget your login credentials. Click Next to proceed.

BENEFICIARY ENROLLMENT

1 • 2 • 3 • 4 • 5 • 6

[← Back](#)

Please create a unique username and password for accessing Payee Manager.

Login Information

Existing User

New User

Username: * (6-50 characters)

Password: * (6-20 alpha-numeric characters)



Confirm Password: *

Challenge Question: * ▼

Challenge Answer: *
* Required Information

[Next >](#)

Step 6: Provide your bank details – bank account number, name on bank account, bank country and currency. Also provide additional details – bank name, bank SWIFT number and bank address. Finally complete your pay-alert email and language information. Click Next to proceed.

BENEFICIARY ENROLLMENT

1 •
 2 •
 3 •
 4 •
 5 •
 6

[← Back](#)

Please provide your bank instructions and remittance option for receipt of payment.

Bank Account Information

Bank Account No.(including IBAN, Clabe, etc.):	* 1234567890
Name on Bank Account:	* John Doe
Bank Country:	* Uruguay ▼
Currency:	* UYU - Uruguayan Nuevo Peso ▼

[Find A Bank ▶](#)

Please use Find a Bank to pre-populate your bank account details.

Enter Bank Manually Details ▼

Bank Name:	* Central Bank of Uruguay
Bank Account Type:	Checking ▼
Bank SWIFT Address:	CBCUUYMMGPA
Bank Street Address:	Diagonal Fabini 777
Bank City:	Montevideo
Bank Province/State:	Montevideo
Bank Postal/Zip Code:	11100
SWIFT Branch Details:	

Fastest Electronic Payment

Enabled
 Preferred form of payment

Bank Routing Code:

Intermediary Bank

Enabled
 Details ▼

Notification of Electronic Payment Initiation

Pay Alert e-mails are generated when a payment is initiated and allow you to track your payment online at our secure website. Multiple e-mail addresses should be separated by a comma or a semicolon.

Pay Alert E-mail:	* john.doe@gmail.com
Language:	* English ▼
Other Information/Notes:	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

* Required Information

[Next ▶](#)

Step 7: Finally tick acceptance of service agreement and Click Submit Enrollment Request at the bottom right of the page.

The screenshot shows a web page for IEEE Beneficiary Enrollment. At the top left is the IEEE logo with the tagline "Advancing Technology for Humanity". At the top right is the WU Business Solutions logo. Below the logos is a progress bar with six steps, where step 3 is highlighted. The main heading is "BENEFICIARY ENROLLMENT". Below this is a navigation bar with a "Back" button. The main content area contains the following text:

Please indicate your acceptance of the Western Union Service Agreement, or download for further review.

Service Agreement

You must accept the terms of this agreement before sending the enrollment request.

GlobalPay Payee Manager Terms and Conditions

Custom House (UK) Limited ("we" "us" "our") offers you access to our website ("site") on the following terms and conditions (the "Terms" or the "Agreement").

By selecting 'I ACCEPT' below, you agree to the following terms.

Background.
We have made this web platform available to you as a convenience to our customers, to whom we, or one of our affiliates, provide payments and foreign exchange services. Our customers have requested us to make payments to you on their behalf. In order to make such payments, you must access the site and provide us with the information we and/or our third party service providers deem necessary. These Terms describe the terms and conditions applicable to your access to and use of the site. In remitting payments on behalf of our customers, we, or our affiliate(s), act as service provider to our customers – not as a service provider to you. We only accept and act upon payment instructions from our customers, and will not act on your payment instructions or otherwise act as a payment service provider to you.

Payee Information. You shall be solely responsible for the accuracy and completeness of your information. You acknowledge and understand that your failure to provide us with and maintain accurate information may result in a delayed or non-delivered payment(s).

[Download Agreement](#)

I agree to the Service Agreement and have reviewed the [Online Privacy Statement](#).

Submit Enrollment Request [!]

You will receive the email below from Western Union once your Enrollment is complete. You will now be able to receive reimbursements directly to your personal bank account.

The screenshot shows an email notification with the following content:

Hello [John Doe](#),

Your enrollment as a beneficiary for client Institute Of Electrical & Electronic Engineers has been approved.

You can now access Western Union GlobalPay Payee Manager, our secure vendor self-management service enabling you to:

Manage
Update your contact and bank account information online

Track
Track the status of your incoming payments to help you better manage your own cash flow.

To access Payee Manager, click [Here](#) and log in using the credentials you supplied during your enrollment, or using the credentials provided to you.

Thank you,

IEEE
Institute Of Electrical & Electronic Engineers

APPENDIX

1. Air Ticket Example

All Air tickets should have the traveller's full names, travel itinerary (departure and arrival dates), names of departure city/airport name and destination city/airport name and price of ticket. The example air ticket below is used in the Concur guidelines in Part 2 for air ticket reimbursement. The information used in the Concur reimbursement is highlighted in blue below.

The image shows a screenshot of an Emirates air ticket receipt. The title is "Ticket & receipt". The ticket number is 172 3292673094. The passenger name is DOE JOHN MR, issued on 31AUG2019. The booking reference is JFGIKL. The receipt includes instructions on how to check in online or at the airport, with time requirements of 90, 60, and 45 minutes. The travel information section shows two legs of the journey: Leg 1 from Johannesburg to Dubai on flight EK 764, and Leg 2 from Dubai to New York on flight EK 201. The departure times and city names are highlighted in blue.

Emirates EXPO 2020 DUBAI UAE OFFICIAL PREMIER PARTNER

Ticket & receipt

Ticket number: 172 3292673094
Scan the bar code or use the ticket number above at the self check-in points in the airport.

Passenger name: DOE JOHN MR
Issued by / Date: 31AUG2019

Your booking reference: **JFGIKL**

Your ticket is stored in our booking system. This receipt is your record of your ticket and is part of your conditions of carriage. For more information you can [read the notices and conditions of contract \(Opens a new window\)](#).

You might need to show this receipt to enter the airport or to prove your return or onwards travel to immigration. Check with your departure airport for restrictions on the carriage of liquids, aerosols and gels in hand baggage and check your visa requirements.

Check in online, or 90 minutes 60 minutes 45 minutes

Check in at the airport. Arrive up to 3 hours before your flight and follow the signs to our check-in counters.

If you're checking in bags, go to our check-in counters at least 90 minutes before your flight.

Once you have checked in, go through security. You should do this at least 60 minutes before your flight.

Arrive at the boarding gate 45 minutes before departure. The gates close 20 minutes before the flight leaves.

Your travel information All times shown are local for each city

→ Departing » From Johannesburg, South Africa

Leg 1 of 4 | Johannesburg (JNB) to Dubai (DXB) | Operated by Emirates (equipment owner - Emirates)

Flight EK 764 Economy Flex	Check-In Opens 26Sep2019 16:10	Departure 26Sep2019 19:10	→ JOHANNESBURG Departing JNB, O R Tambo International Airport
Seat 44K	Status Confirmed	Arrival 27Sep2019 05:25	→ DUBAI Arriving DXB, Dubai International Airport Terminal 3

Coupon validity: not before 26Sep2019 / not after 26Sep2019 **Baggage 2Piece**

Leg 2 of 4 | Dubai (DXB) to New York John F Kennedy (JFK) | Operated by Emirates (equipment owner - Emirates)

Flight EK 201 Economy Flex	Check-In Opens 27Sep2019 05:30	Departure 27Sep2019 08:30	→ DUBAI Departing DXB, Dubai International Airport Terminal 3
Seat 48G	Status Confirmed	Arrival 27Sep2019	→ NEW YORK



OFFICIAL PREMIER PARTNER



Ticket number: 172 3292673094
Scan the bar code or use the ticket number above at the self check-in points in the airport.

Your travel information

All times shown are local for each city

→ Departing » From New York, United States

Leg 3 of 4 | New York John F Kennedy (JFK) to Dubai (DXB) | Operated by Emirates (equipment owner - Emirates)

Flight EK 202 Economy Flex	Check-in Opens 04Oct2019 20:00	Departure 04Oct2019 23:00		NEW YORK Departing JFK, John F Kennedy International Airport Terminal 4
Seat 47G	Status Confirmed	Arrival 05Oct2019 19:45		DUBAI Arriving DXB, Dubai International Airport Terminal 3
Coupon validity: not before 04Oct2019 / not after 04Oct2019		Baggage 2Piece		

Leg 4 of 4 | Dubai (DXB) to Johannesburg (JNB) | Operated by Emirates (equipment owner - Emirates)

Flight EK 767 Economy Flex	Check-in Opens 05Oct2019 20:20	Departure 05Oct2019 23:20		DUBAI Departing DXB, Dubai International Airport Terminal 3
Seat 41K	Status Confirmed	Arrival 06Oct2019 05:30		JOHANNESBURG Arriving JNB, O R Tambo International Airport Terminal A
Coupon validity: not before 05Oct2019 / not after 05Oct2019		Baggage 2Piece		

Fare information

Fare ZAR6270	Equivalent fare -	Taxes / Fees / Charges (TFC) ZAR238.07-ZA ZAR190.00- WC ZAR24.86-EV ZAR22.00- UM ZAR292.00-F6 ZAR42.00- ZR ZAR86.00-AY ZAR570.00- US ZAR61.00-XA ZAR107.00-	Total fare (Incl. TFC) ZAR10863.93	Form of payment CREDIT CARD
-----------------	----------------------	--	---	--------------------------------

Fare calculation
JNB EK X/DXB EK NYC149.66KLXESZA1 EK X/DXB EK JNB292.96WLWESZA1 NUC442.62 XF JFKZAR4.5END ROE14.165331

Additional information
NON-END/FLEX



2. Registration Invoice Example

The example registration invoice below is used in the Concur guidelines in Part 3 for conference registration fee reimbursement. The information used in the Concur reimbursement is highlighted in blue below.

 IEEE <i>Advancing Technology for Humanity</i>	<h1>Receipt/Invoice</h1>																
IEEE 445 Hoes Lane Piscataway, NJ 08854 United States Tax ID: 13-1656633	Event Title: IAS 2019 Event Location: Baltimore, Maryland, United States Event Dates: 29 September - 3 October, 2019 Confirmation Number: 1294																
To: John Doe Westville University 88 Willow Street, Denver USA																	
Order: IAS20191294																	
Order Date: 08-21-2019																	
<table border="0"><thead><tr><th>Item</th><th>Price</th><th>Quantity</th><th>Amount</th></tr></thead><tbody><tr><td>ECCE and IAS Conference Student IEEE Member Early</td><td>\$350</td><td>1</td><td>\$350</td></tr><tr><td>CMD Dinner</td><td>\$125</td><td>1</td><td>\$125</td></tr><tr><td colspan="3"></td><td style="text-align: right;">Order Total: \$475</td></tr></tbody></table>	Item	Price	Quantity	Amount	ECCE and IAS Conference Student IEEE Member Early	\$350	1	\$350	CMD Dinner	\$125	1	\$125				Order Total: \$475	
Item	Price	Quantity	Amount														
ECCE and IAS Conference Student IEEE Member Early	\$350	1	\$350														
CMD Dinner	\$125	1	\$125														
			Order Total: \$475														
Payment Details:																	
<table border="0"><thead><tr><th>Date</th><th>Type</th><th>Amt Paid</th></tr></thead><tbody><tr><td>08-21-2019</td><td>American Express</td><td>\$475</td></tr></tbody></table>	Date	Type	Amt Paid	08-21-2019	American Express	\$475											
Date	Type	Amt Paid															
08-21-2019	American Express	\$475															
Prepared by:  Tonya Stanback IEEE Registrar IEEE Meetings, Conferences, and Events																	
<small>All fees shown above are in US Dollars(US\$).</small>																	

3. Hotel Invoice Example

The Hotel invoice below is used in the Concur guidelines in Part 4 for Hotel fee reimbursement. The information used in the Concur reimbursement is highlighted in blue below.

		HILTON BALTIMORE 401 West Pratt Street Baltimore, MD 21201 T: 443 573 8700 F: 443 683 8841 W: baltimore.hilton.com				
NAME AND ADDRESS: JOHN DOE 88 Willow Street, Denver, USA		Room: 1127/D2 Arrival Date: 10/3/2019 12:13:00 PM Departure Date: 10/4/2019 Adult/Child: 1/0 Room Rate: 209.00 Rate Plan: 2G HH # AL: Car:				
Confirmation Number: 3149257198 10/4/2019						
DATE	DESCRIPTION	ID	REF. NO	CHARGES	CREDITS	BALANCE
10/3/2019	4870847	GUEST ROOM			\$209.00	
10/3/2019	4870847	CITY TAX (R)			\$19.86	
10/3/2019	4870847	STATE TAX (R)			\$12.54	
10/4/2019	4871457	TOTAL			(\$241.40)	
		BALANCE			\$0.00	

4. Taxi Receipt Example

The Taxi Receipt below is used in the Concur guidelines in Part 5 for Ground Transportation reimbursement. The information used in the Concur reimbursement is highlighted in blue below.

BWI TAXI MANAGEMENT, INC. BALTIMORE/WASHINGTON INTERNATIONAL AIRPORT MARYLAND...21240		410-859-1100 410-859-1102 Operator of	BWI 27036-043 AIRPORT CAB																		
RECEIVED FROM: NAME <u>Saleem Mujhid</u> TRANSPORTATION TO _____ DATE <u>09/27/2019</u> CAB NO. <u>201</u> hauffeur <u>car 76</u>	<table border="1"> <tr><td>METER FARE</td><td></td><td></td></tr> <tr><td>BAGGAGE</td><td></td><td></td></tr> <tr><td>TOLLS</td><td>33.0</td><td></td></tr> <tr><td>OTHER</td><td></td><td></td></tr> <tr><td>TIP</td><td></td><td></td></tr> <tr><td>TOTAL</td><td></td><td></td></tr> </table>	METER FARE			BAGGAGE			TOLLS	33.0		OTHER			TIP			TOTAL				
METER FARE																					
BAGGAGE																					
TOLLS	33.0																				
OTHER																					
TIP																					
TOTAL																					
Please refer to rate schedules in each taxicab. Should you have any questions regarding lost articles or service, please call BWI Taxi Management, Inc. (410-859-1102) or the Maryland Aviation Administration (410-859-7033). Thank you																					

5. Expense Report Example (Signed by both the Travel Recipient and the CMD Chair)

The Institute of Electrical and Electronics Engineers, Inc.

1250

Expense Report

2019

Name: **JOHN DOE** For Period Ending: **15 JULY 2019**

Send check to the following address : Member of: **Other**

Check to be provided in Baltimore at IAS Annual Meeting If Other, please describe :
The SB of my university has not yet been formed

****For IEEE Staff Use Only**** If the payee is U.S. based, are they enrolled in iSupplier for electronic reimbursement (ACH)? YES NO
 If YES, it is not necessary to provide any banking information. If NO, please contact iSupplier@ieee.org to initiate the ACH on-boarding process.
 U.S. based Volunteers should not contact iSupplier@ieee.org directly. Instead, they should contact the appropriate staff admin to request ACH enrollment.

Member No. 92489148 Purpose of Trip - Note each day's activity

Supplier No. _____

Site: _____

Provide details and full support on items (1) through (6)

Details	Date	Town	KM	Mile	PERSONAL AUTO USAGE MAKE ONLY ONE CHOICE, MILES OR KILOMETERS				Total Expense	Chrg. Dir. to IEEE(7)		
Personal Auto Usage : (Enter " X ")									NO			
Mileage Allowance (\$0.58/Mile, \$0.36/Km) in US\$			0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Trans. - Tolls & Parking									0.00			
Taxi/Bus - See Itemized Expenses (1)									0.00			
Plane, Train, Auto Rental (Provide Backup)			800.00						800.00			
Lodging - Self									649.57			
Meals/Self - see Itemized Expenses (2)			0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Official Guest - see Itemized Expenses (3)			0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Miscellaneous - Tel. & Telegraph									0.00			
Tips & Gratuities (4)									0.00			
Other (5) - complete section below or provide receipt			350.00						350.00			
Other (6) - complete section below or provide receipt			100.00						100.00			
Total Expense w/o Mileage Allowance			1250	0.00	0.00	0.00	0.00	0.00	1250	0.00		
Currency Conversion Rate									1.000			
Total Expenses wo/Mileage Allowance in US \$												
Details for expenses classified as Misc or Other must be provided if \$25 or less. In lieu of providing a detailed summary, a receipt may be attached. Receipts are still required if over \$25.									Mileage Allowance in US\$	w/Conversion	0.00	0.00
									Less Charged Directly to IEEE in US\$	0.00		
(5)									Less Advance from IEEE in US\$	0.00		
									Total Balance due w/Mileage Allowance from(to) IEEEw/conversion			
(6)									Total Balance due w/Mileage Allowance from(to) IEEE in US\$	1250		

ENTITY	BUSI.UNIT	COST CTR	ACCT	PROJ	AMOUNT
DISTRIBUTION TOTAL					0.00

Originator's Name & Signature: **JOHN DOE** Date: **15-July-2019**

Approved By: **Lesley Arakkal** Date: **10 October 2019**

Print Name Signature

By signing and submitting this reimbursement request to IEEE, I attest all expenses identified on this expense report have been used solely for the purposes of IEEE business. I also certify these expenses have not been previously reimbursed by IEEE.

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