Transition Guide for the Enhanced UI – Highlights
Standard Edition
Rev: October 16 2014

The Concur User Experience Evolution is a key initiative that will accomplish three primary goals.

- Modernize the user experience and increase the usability of Concur applications, while maintaining the ability to apply and enforce company policies
- Implement features and functionality in a manner that provides clients with the maximum benefits for their Travel, Expense, and Invoicing needs, while minimizing change-management impacts
- Allow effortless navigation and access to features for all products on the web and mobile devices
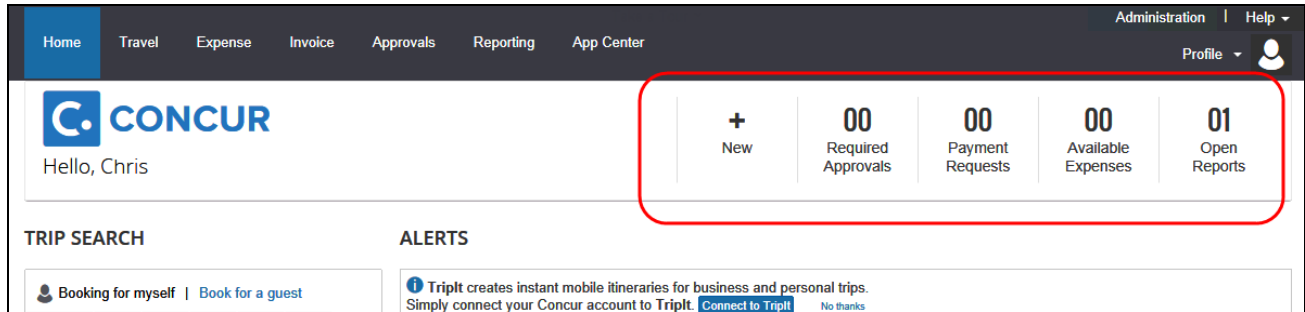
Enhanced and New Pages

Concur Home Page – Fully Redesigned

In the current UI, the home page for Concur is known as **My Concur**. In the enhanced UI, the page is called the home page.
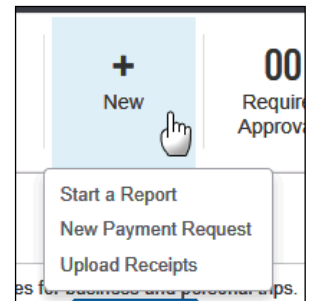
QUICK TASK BAR

The new Quick Task Bar gives users quick access to their most important tasks. The tasks that appear depend on the user's roles/permissions.
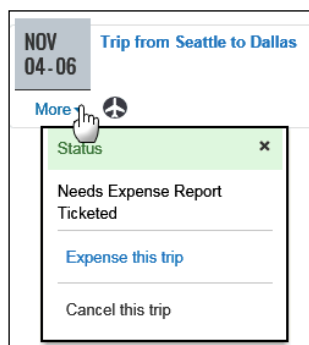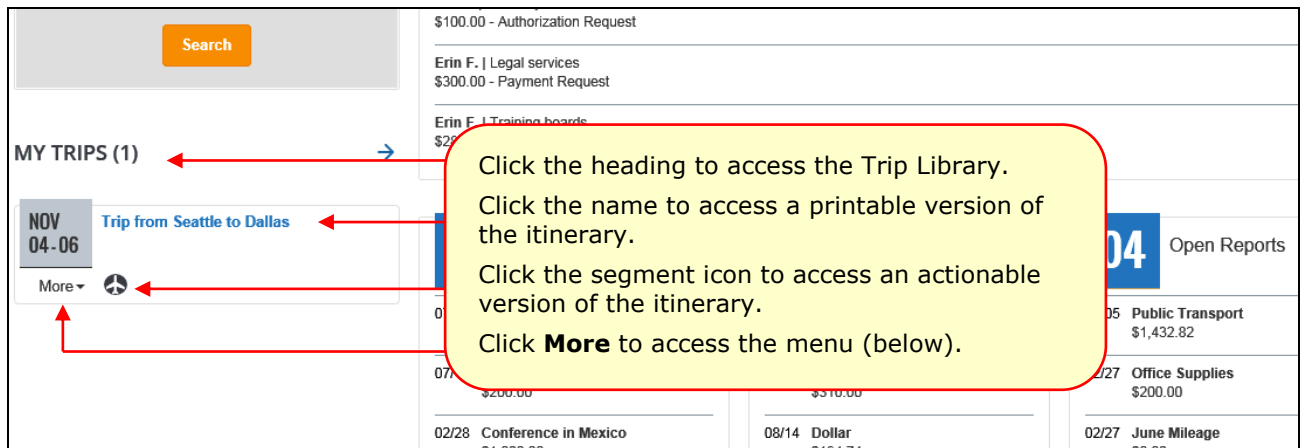

It also includes the count of associated tasks. As shown here, this user has 1 open report.

- The user clicks any of the tasks for quick access to the associated page. For example, when the user clicks the **Open Reports** task, the page listing the user's expense reports appears.

- Available expenses are also listed. (*Available Expenses* is the new name for *Smart Expenses* – card charges, receipt images, e-receipts that can be used to create or attach to expense entries.)

- There may be several **+** tasks for starting a new report, uploading receipts, etc. The **+** tasks that appear depend on the user's roles/permissions. Also, there may be only one **+** task and it may display multiple options when the user hovers the mouse pointer over it.

MY TRIPS

This section appears just below the **Trip Search** section.

Click the heading to access the Trip Library.

Click the name to access a printable version of the itinerary.

Click the segment icon to access an actionable version of the itinerary.

Click **More** to access the menu (below).

MY TASKS

This section replaces the **Active Work** section on the **My Concur** page and is similar to the Quick Task Bar – it provides users quick access to the most important tasks.

RETURNING TO HOME

Once you leave the home page, the **Home** menu is replaced by the Concur logo. To return to the home page, click the logo.

Approvals Page – NEW

The **Approvals** page is new. It contains all items that require the user's approval, such as trips, requests, reports, and cash advances. The user clicks a tab to quickly access each type of item that requires approval. The user clicks an individual item to open it.

The user can click the check box for an item and click **Approve**, if the company configuration allows approval without opening.

To access historical information, the user clicks the appropriate sub-menu option.

Expense Page – Fully Redesigned

This page shows the user's active reports and available expenses and receipts.

- **Tiles:** The user's active reports are shown as tiles. Name, amount, status, and comments appear on each tile. The user clicks a tile to open a report.
- **All reports:** To the right of the tiles is the All reports link. The user clicks this link to see all reports – active, paid, etc.
- **New:** To create a new report, the user clicks Create New Report.
- **Available Expenses:** Available expenses (formerly known as Smart Expenses) appear at the bottom of the page. The user can add them to an expense report.
- **Available Receipts:** Available receipts appear at the bottom of the page. The user can attach them to an expense.

Travel Page – Enhanced

For the most part, the enhancements involve look-and-feel, except:

- **Travel Map:** The Travel Map has been removed.
- **Travel policy:** In the current UI, there was a menu option called *Travel Policy.* It highlights all the travel policy rules enabled for the user/arranger's travel class. In the enhanced UI, the link is in the footer:
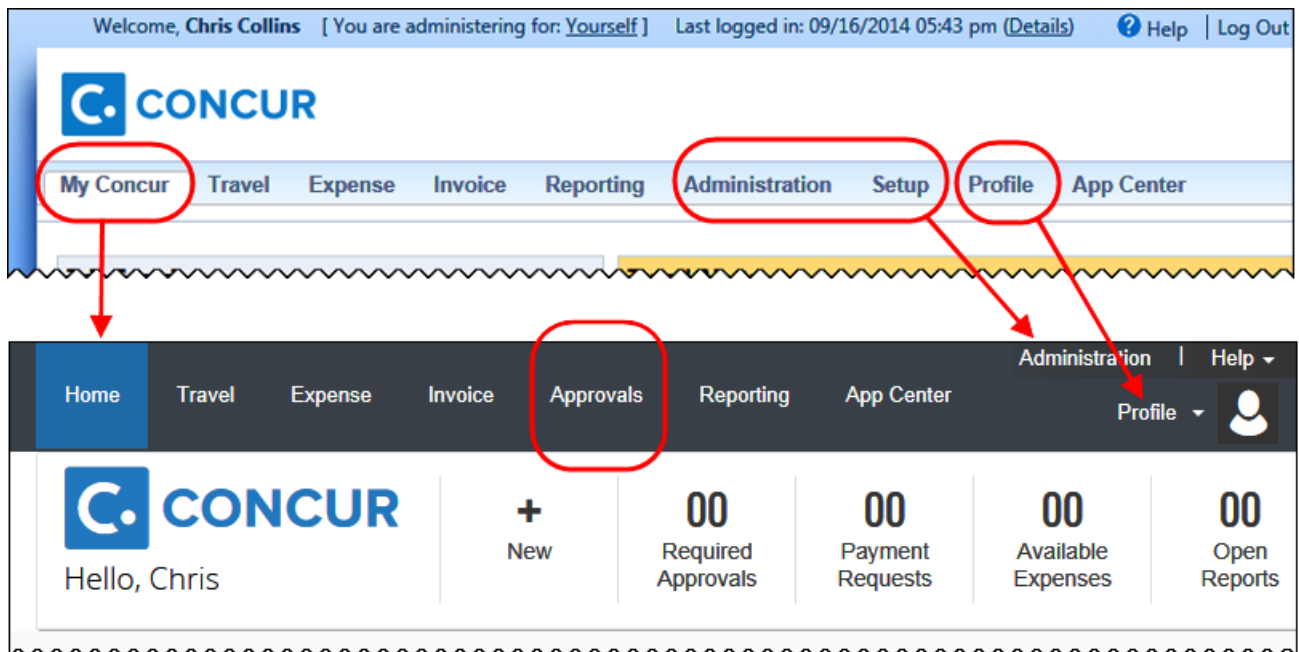

Invoice, Reporting, and App Center Pages – Look and Feel

The changes on these pages involve look and feel. Samples are not shown here.

Menus

Here is a quick look at some of the menu options that have moved.

The enhancements are:

- **My Concur** is now **Home**.
- **Approvals** is new.
- **Administration** and **Setup** are combined.
- **Profile** contains additional options.

ADMINISTRATION MENU
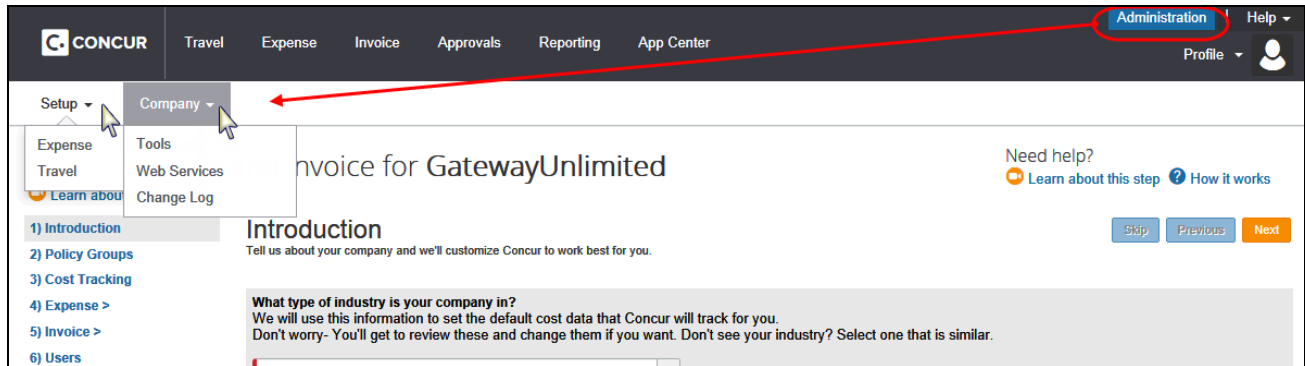
Some of the menus options have moved but the actual pages remain unchanged.

Current *Administration* menu option	Now available at...
Web Services	Administration > Company > Web Services
Expense Tools	Administration > Company > Tools Depending on your permissions, Tools may appear immediately after to click Administration.
Change Log	Administration > Company > Change Log
Current *Setup* menu option	**Now available at...**
Expense	Administration > Setup > Expense Depending on your permissions, Expense setup may appear immediately after to click Administration.
Travel	Administration > Setup > Travel Depending on your permissions, Travel setup may appear immediately after to click Administration.

Resizing – Responsive Design

If the width of the screen is reduced, ☰▾ appears. Click to access the additional menu options.
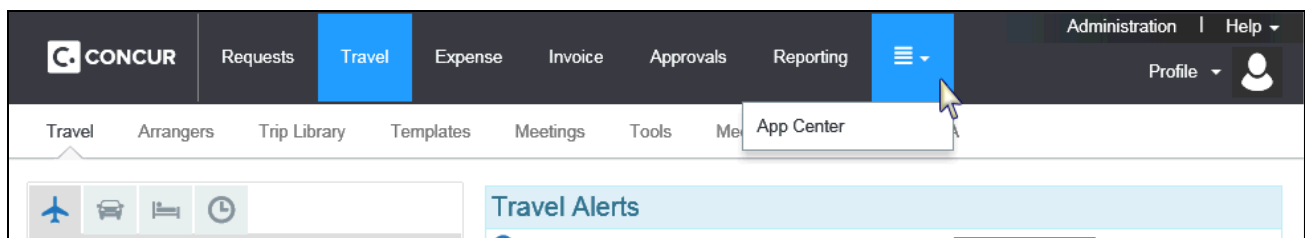
If the width is further reduced (for example, to display on a tablet) the **Administration** menu moves from the upper-right corner and the icon below **Help** becomes **Profile**.
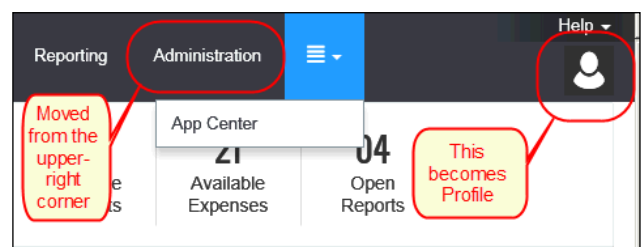
Profile – Profile, Sign Out, Delegate, Travel Assistant/Arranger

Profile settings, sign out, and administer for another user (for the delegate or travel assistant/arranger) have been moved to the **Profile** menu.
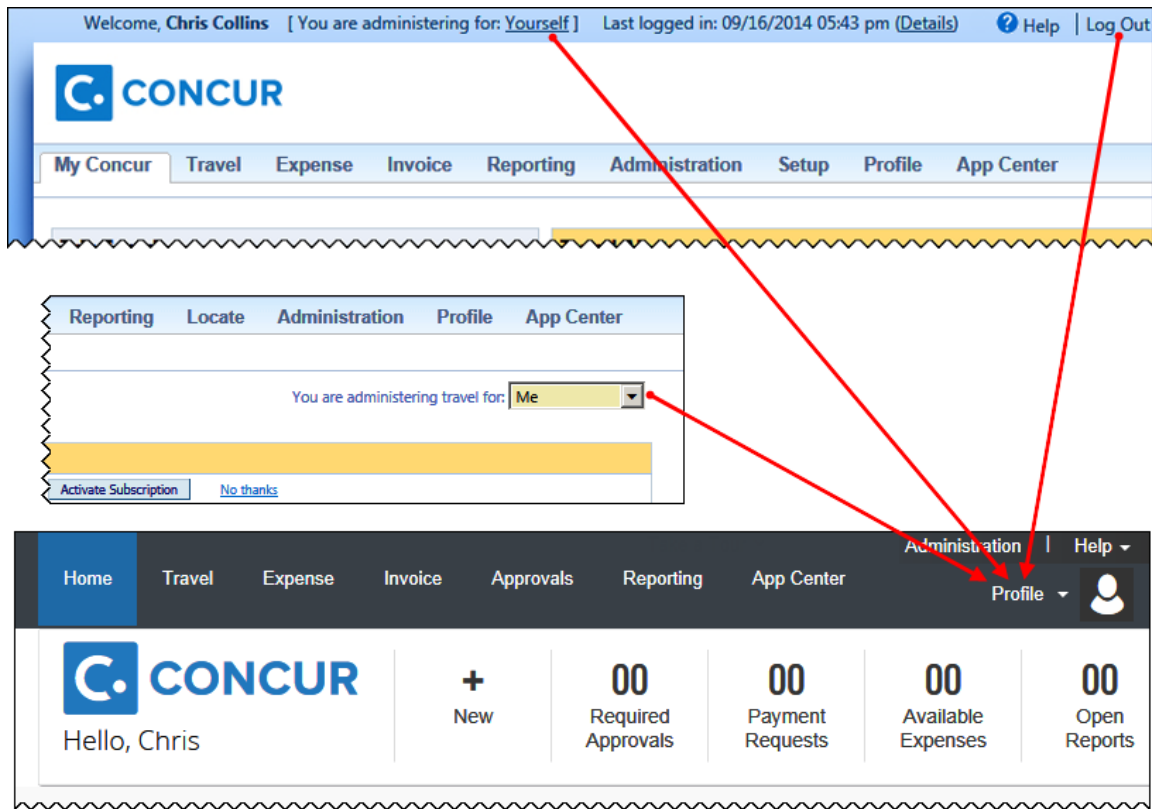
Profile Menu
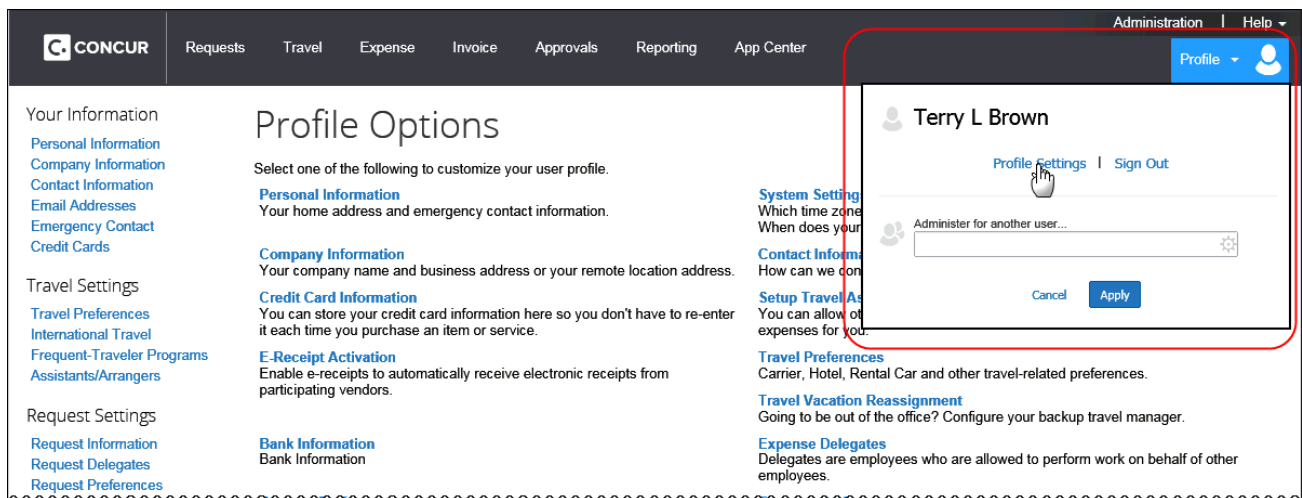
Profile Settings

In the enhanced UI, the user clicks **Profile** > **Profile Settings**. The changes in the **Profile Options** page involve look-and-feel except Expense credit Card. Refer to *Additional Expense Pages* in this document.

Sign Out (Log Out)

With the enhanced UI, users click **Profile** > **Sign Out**.

Administer for Another User – Delegate or Travel Assistant/Arranger

Chris L Collins

Profile Settings | Sign Out

Administer for another user…

Brown, Terry L
TerryBrown@RandomVerbs.com (User Name)

Cancel | **Apply**

The delegate or travel assistant/ arranger uses **Profile** to select a user. He/She clicks **Profile**, selects the desired user, and clicks **Apply**.

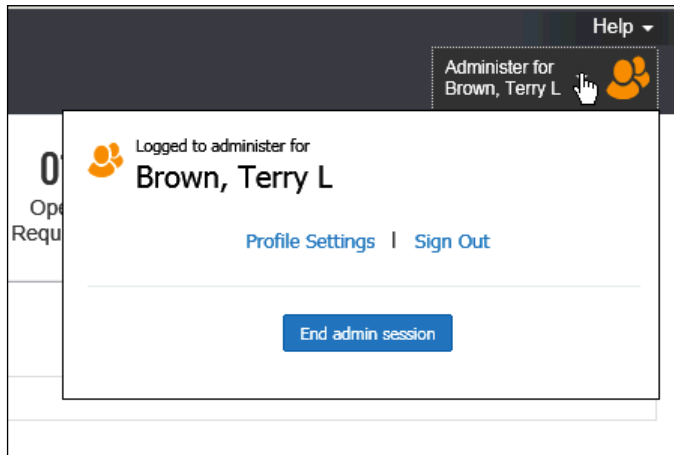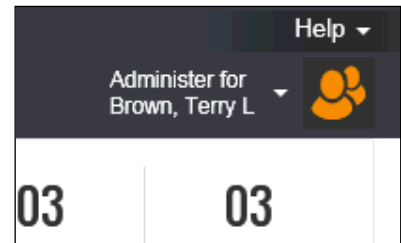**NOTE:** If the delegate has 10 or less users, then they appear in a drop list. If there are more than 10, then the user enters the first few letters of the desired user's name and selects from the search results.

The **Profile** menu option then becomes **Administer for <name>** and the single "user" icon becomes a double "user" icon.

Help ▾
Administer for
Brown, Terry L

03   03

Help ▾
Administer for
Brown, Terry L

Logged to administer for
Brown, Terry L

Profile Settings | Sign Out

End admin session

To return to working for himself/herself, the user clicks **Administer for <name>** and then clicks **End admin session**.

Additional Travel Pages

Here are the other changes to Travel. Most enhancements involve look-and-feel.

ARRANGER VIEW HOME PAGE

In the current UI, arrangers in Travel see the **Make this my homepage** link (top right) when viewing the Arranger home page. This has been removed in the enhanced UI.

Now, arrangers can elect to have the Arranger page as the home page via **Profile** > **Profile Settings** > **System Settings** (left menu). In the **Other Preferences** section, in the **Home Page** list, the arranger clicks *Travel Arranger View*.

Other Preferences

Home Page

Expense Processor
Request Processor
Travel Arranger View
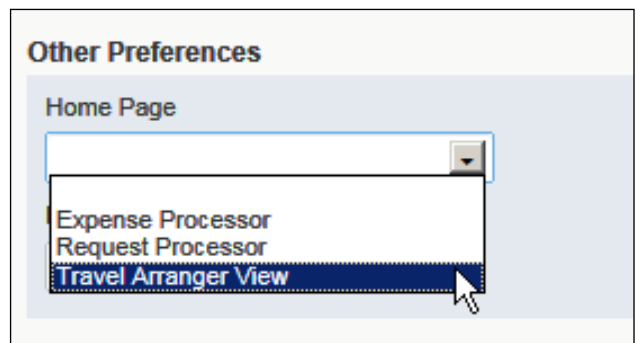
Search Results Pages

Change Flight Search, Filters, and Total Estimated Cost have moved from the right side of the search results page to the left side of the page.

Also note that – for air, car, hotel, and rail bookings – the **Reserve** button now reads **Select** .

Travel Review Pages – NEW

This is a new feature with the enhanced UI. This page allows the user/arranger to see, review, and change pertinent options about each segment. Here are a few samples:

- A review of the segments booked

- Preferences (comments previously called Message to Vendor)

- Traveler information including name, contact information and frequent guest program details

ENTER TRAVELER INFORMATION
Ensure all traveler information below is correct. ⓘ

PRIMARY TRAVELER   Edit | Review all

Name: William Never   **Phone:** 314-769-9055   [heidi.worms@concur.com ▾]

Document Type
[Passport ▾] View Details

Frequent Flyer Programs
For American Airlines
[American Airlines -- 34P13Y8 ▾]

- Seat Assignments for Air/Rail

SEAT ASSIGNMENT

Make your trip more enjoyable by selecting your seats now. Otherwise, Concur will request them for you.

[Select Seats]

- Method of Payment

SELECT A METHOD OF PAYMENT

How would you like to pay?
◉ **Choose a credit card**
[Mobile Test Card* (...1111) ▾]   Add credit card

* Indicates credit card is a company card

- Rules and Restrictions

ACCEPT FARE RULES AND RESTRICTIONS
NON-REFUNDABLE TICKET
Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only. Select these flights anyway?

RULE APPLICATION AND OTHER CONDITIONS
NOTE - THE FOLLOWING TEXT IS INFORMATIONAL AND NOT VALIDATED FOR AUTOPRICING. EXCURSION FARES APPLICATION CLASS OF SERVICE THESE FARES APPLY FOR FIRST/BUSINESS/ECONOMY/COACH CLASS SERVICE. CAPACITY LIMITATIONS SEATS ARE LIMITED.

ELIGIBILITY
NO ELIGIBILITY REQUIREMENTS APPLY.

DAY/TIME
PERMITTED MON/TUE/WED/THU/SAT.

☐ * I agree to the above fare rules and restrictions.

Additional Expense Pages

Here are the other changes to Expense.

Attendees Table within an Expense

In the enhanced UI:

- The buttons above the attendee names have been rearranged.
- As the browser size is reduced, the attendee button bar can now collapse from both the right and the left side to compensate.

Personal Credit Card in Profile

If your company allows you to import your personal credit card transactions, note that your card information now appears in Profile instead of on My Concur.

Also be aware that your card transactions no longer appear on My Concur. They appear in the **Available Expenses** section of the Expense page.