Frequently Asked Questions | EXTERNAL

Concur Expense

NextGen UI for Concur Expense

Updated: September 2021

The continued evolution of the Concur® Expense solution user interface experience is the result of thoughtful design and research that provides a modern, intuitive, and streamlined experience for creating and submitting expense reports.

This FAQ is also available in Japanese.

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FREQUENTLY ASKED QUESTIONS

Why are we updating the user interface (UI)?

The continued evolution of the Concur Expense user interface (UI) helps users of all types easily understand what they need to do and how in order to get their expenses done and get back to business. Our NextGen UI is focused on three key areas:

- Usability: the updated UI is designed to be more intuitive. It results in fewer errors, hence fewer calls to administrators and higher satisfaction for users.
- Efficiency: we have optimized our task flows and made the interface more intuitive to save users time, especially for tasks such as adding attendees and itemizing hotel expenses.
  - Our data shows that users on the updated UI completed complex expense reports about 10% quicker and simple reports about 25% quicker (based on web data collected in 2019).
- Accessibility: developed taking an inclusive approach to design and engineering using the SAP Accessibility Standard. Learn more about accessibility here.

In addition to updating the user interface, we are taking advantage of technology to more efficiently enhance our solutions to deliver even greater value, often in response to your ideas and feedback.

Watch our session from Fusion (March 2021) on "Lessons in Adopting the New User Experience".

What editions are impacted? What about the SAP® Concur® mobile app?

This user interface evolution for Concur Expense only applies to Concur Expense on the web, irrespective of edition (Professional or Standard). The SAP Concur mobile app experience will not change as a result of this UI change.

Will all customers be required to move to the NextGen UI?

Yes, all customers are required to transition to the updated UI. We already have thousands of customers who have moved and are receiving all the updated functionality being delivered in every release. With all customers on a single UI, we are able to offer a consistent user experience for all customers and it allows for streamlining support and other services. It will also allow us to more efficiently enhance our solutions to deliver even greater value.

When is it coming?

We are providing a long runway for transition planning. We have now moved from the opt-in period to the active move period starting September 2021. During this period, we expect you to start your transition planning and move now that most features are available.

It’s been great to see thousands of customers using and rolling out the updated UI, and data shows the NextGen UI is providing improved efficiency and user satisfaction, especially to first-time users.

- Our data shows that users on the updated UI completed complex expense reports about 10% quicker and simple reports about 25% quicker (based on web data collected in 2019).

All remaining customers who have not yet moved by October 1, 2022 will be automatically transitioned to the NextGen UI for Concur Expense. We therefore encourage you to start planning now and move as early as you can in alignment with your business priorities. We expect you to move well before October 1, 2022, and you should not wait for this date.

Updates will continue to be communicated throughout 2021 and 2022 in the Release Notes. You can track any outstanding features not yet available in the NextGen UI for Concur Expense here: Professional | Standard.

How are you communicating about the NextGen UI?

As we are providing a long runway to transition, we are communicating throughout this period. In-product messaging directed to administrators will also be starting.

How should we plan our transition?

The long transition period provides an opportunity for your project team to familiarize yourselves with the updated UI, to update any internal documentation, and to plan your communications and timing for rollout. We expect you to move your organization to the updated UI well before the automatic transition date and not to wait. We are excited to share upcoming in-app user assistance to help guide users through the updated UI (more information below). We have detailed documentation to guide Concur Expense administrators on how to move their users to the updated UI along with recommended configuration changes. These guides detail the timeline and transition options. As we add more features, details may change, and the guides will be updated over time, so check back often.

- Professional edition
- Standard edition

Additionally, you can reference our User Adoption Resources or hear from your peers through our session from Fusion (March 2021) on “Lessons in Adopting the New User Experience”.

What is a user assistance solution?

A user assistance solution in your SAP Concur solution will help drive user adoption by supporting the onboarding process as well as increase productivity for users of all levels by enhancing usability.

When is the user assistance functionality planned to be available?

We plan to offer standardized user assistance content to end users in the future to coincide with the migration efforts to the updated Concur Expense and Concur Request user experience. This opt-in functionality will allow your administrators to decide whether they want to enable the user assistance experience or if they would prefer to wait, allowing customers to control how their users experience the updated SAP Concur interface.

More information on market availability, features, and timeline is planned to be available later in 2021. As we are able to release more information, we will provide this to our customers.

How does your user assistance functionality help me drive adoption of the updated UI?

Our user assistance functionality will help users navigate unfamiliar experiences in SAP Concur solutions to improve their product proficiency and reduce time on task. By making guidance available to users in the product, we're able to proactively provide support and help users navigate experiences they aren't familiar with yet. Users can choose whether or not they leverage this feature for assistance. In order to avoid disruption, once they successfully complete a task using assistance, the feature will no longer appear when the user repeats the same or similar tasks. By improving familiarity and expediting tasks, users' productivity will increase.

How should we plan our move to the NextGen UI for Concur Request (if applicable)?

Concur Expense and Concur® Request are two different solutions that we offer, and they are both moving to the NextGen UI. If you have both solutions, you will have to move to the NextGen UI for Concur Expense and Concur Request at the same time since many features and screens are shared. In this way, you will only need one change management plan, and this approach allows your users to enjoy a single, refreshed experience for both solutions at the same time.

For more information about the NextGen UI for Concur Request, please visit our FAQ.

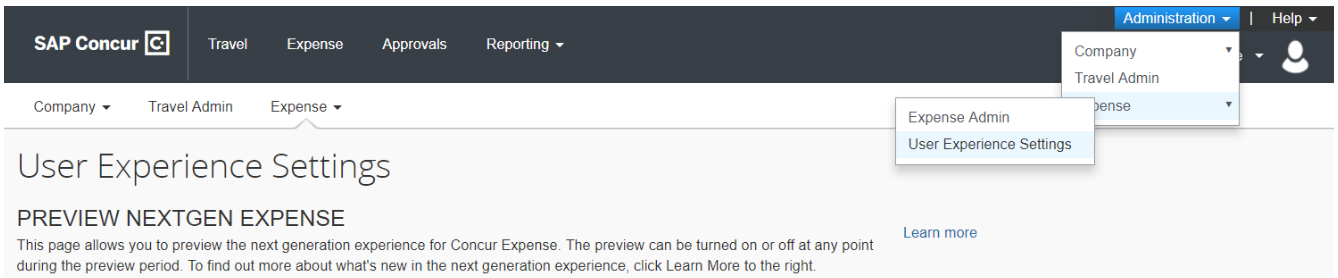
Are there features that are not yet available in the NextGen UI?

Yes. Not all functionality is available in the NextGen UI yet. However, the vast majority and most-used features are now available. There is a small list of features that are not yet available (Professional | Standard). The list of features will be continually updated, so please refer to the published list for current details. There are also some features that will not be made available in the updated UI because of very low user or customer adoption. To best prioritize delivering future innovation, we are retiring a few features. These can be found in Table #3.

How do we get started?

To get started, follow this path from within Concur Expense: Administration > Expense > User Experience Settings. If you have Concur Request, please review the FAQ for Concur Request as there are a couple of different scenarios for Concur Request customers.

- **Professional edition:** Expense Admins may enable themselves, the entire organization or any subset of users
- **Standard edition:** Expense Admins can enable themselves or the entire organization only



Note this Professional edition screenshot is different for Standard customers.

Use the same tools to return to the current Concur Expense UI as you used to turn on the NextGen UI. Follow this path from within Expense: Administration > Expense > User Experience Settings.

During this period, will you be implementing additional changes, features and enhancements?

Yes. We are providing scheduled releases of features, functionality enhancements, and issue resolutions during this period and beyond. Some new features will only be released on the NextGen UI. These Concur Expense releases are planned twice per month, but the frequency may be adjusted depending on the issue. Changes will be incorporated into Release Notes, however, changes may be published prior to appearing in the Release Notes as warranted. Once we get closer to the automatic transition date, all release notes are planned to be published along with our regular release notes. Information about these changes will be accessible from the Learn More link on the User Experience Settings page.

Why should we move our organization before the automatic transition date?

In order for your users to take advantage of all the new features and enhancements available on Concur Expense, your organization must move to the Next Gen UI. The sooner you plan this move, the more time you have to prepare your users and the faster they will be able to benefit from SAP Concur product innovations.

What new major features and enhancements are only being built on the NextGen UI?

Now and in the future, certain enhancements will only be released on the NextGen UI, meaning that your organization must transition to the updated UI before being able to use the new or enhanced feature. Below is a list of major features that will only be release on NextGen UI for Concur Expense. Consider your organization's timeline carefully if you want to use one of these features sooner or later.

- Hotel itemization wizard improvements
- User onboarding screens for trip-based Expense Assistant
- Enhanced options for controlling deletion of card transactions
- Multiple expenses linked to one receipt image
- Automatic creation of an expense report from an approved request
- Delta posting for organizations using the SAP Integration to Concur solutions, allowing the user to re-open a paid report to make corrections
- Receipt Digitalization for France and Spain
- New Travel Allowance service (initially for net-new Travel Allowance customers only)
- Japan Public Transport 2.0 (JPT 2.0) (planned for Q2 2021 for net-new JPT customers only)

Please note that this list is not exhaustive. Common questions about these features are:

> When are these features available? The availability of new or updated features will be covered in the Concur Expense Release Notes as they are released. If you have additional questions about our planned future feature enhancements, please reach out to your account team for information about our roadmap.
>
> What do I need to do in order to use the new Travel Allowance service? The NextGen UI for Concur Expense will allow you to continue to use the current Travel Allowance configuration without changes. Customers should transition to the NextGen UI now and not wait for the new Travel Allowance service.
>
> What should I know about transitioning to Japan Public Transport 2.0 (JPT 2.0)? Customers who use JPT 1.0 need to transition to JPT 2.0 at the same time they move to the NextGen UI for Concur Expense (for example, by group for those users who rely on JPT). The current JPT is not available on the NextGen UI for Concur Expense. The updated JPT functionality for existing customers is currently product direction on our roadmap, and more information on timing and transition will be released when it's available. For now, those customers who use JPT should continue to keep those users on the current UI.

What will the user experience be when we transition over?

The first time the user visits the expense home page in the updated UI, the user will see a three-slide product tour. This tour will introduce the updated UI and briefly explain the most notable changes and their benefits. All messages will be displayed in the language the user has selected in their settings.

Is there any change in functionality?

Although the UI and feature changes are separate initiatives, some functionality currently under development will only be available on the updated UI and will not be released to customers using the current UI. There are also some features that will not be made available in the updated UI because of very low user or customer adoption. To best prioritize delivering future innovation, we are retiring a few features. These can be found here in Table #3: Professional | Standard.

What exactly is changing?

While changes can be seen throughout the product, the primary updates are being made to allocations, itemizations, and attendees. For a detailed list of all changes, please refer to the End User Transition Guide. This guide will be continually updated as new features become available so please refer to this online document for the most recent information. It is not recommended that you save local copies.

Specific pages / activities include:

- Concur Expense landing page
- Expense Report page
- Expense Entry page
- Report Modals
- Itemizations
- Attendees
- Allocations
- Mileage

Are any icons being removed or altered? If so, why?

Yes, a number of icons have been removed and replaced with cleaner messaging. User testing demonstrated that much of our iconography did not have significant meaning to our users. By removing the icons, cleaner space was created that allowed for clearer text and direction to guide the user through exactly what needs to be done to complete their expense report.

We are always working to improve the experience and some icons may be added back where useful.

Are any administrator / approver / processor screens or processes changing?

The first phase of the UI change is focused on users. Additional phases are planned that will include approver and processor screens. These future phases will not only bring the benefits of greater accessibility and ease-of-use to approvers, but also create a more consistent experience for creating, submitting, and approving an expense. An updated UI for Approvers is product direction on our roadmap.

How does this impact my data or user transactions during the process?

There will be no impact to data or transactions; only the UI used to access that data has changed. Users can take any action on either UI during the transition period.

How does this impact reporting, web connectors, and other processes?

There will be no impact to any backend processes or reporting. Only the Concur Expense UI has changed.

How might this impact any custom translations or labels?

This should not impact any translated labels that are already in place.

Concur Expense will suggest specific areas of your configuration where a text review might allow better optimization of your exception messages.

What will happen if users and administrators are working in Concur Expense when we transition?

Expenses or expense reports created on the current user interface will not be affected when a user is switched to the NextGen UI. The user, approver, and processor may continue the expense reporting process with no interruption. Users can continue to work on the current Concur Expense UI and will only see the updated UI after they sign out and then sign back on. No other action will be required from the user.

How are test entities being moved to the updated UI?

The same tools available to Expense Administrators in the production sites will be available on test entities. Deploying the NextGen UI in your test site will not impact your production entity. Any test entities that have not been moved by October 1, 2022 will be automatically transitioned.

Are there any special requirements for the updated UI to function? (browsers, bandwidth, and others)

The standard list of supported configurations will apply.

How do I know which edition we are on (Standard or Professional)?

There are two editions of Concur Expense: Standard and Professional. To find out which edition you have, sign in to Concur Solutions > click Help in the upper-right corner > click Expense Help. Users will see their edition at the top of the page.

How do I provide feedback on the updated UI?

These are the methods to provide feedback:

- If you have a change that would be considered an enhancement to the UI, Authorized Support Contacts can submit a Solution Suggestion through the Customer Support Portal. In your suggestion, please include the phrase “NextGen UI”.
- If you believe you have found a mistake or bug, Authorized Support Contacts can submit a Support Case through the Customer Support Portal. In your case, please include the phrase “NextGen UI”.

If you have other questions, reach out to your SAP Concur account team.

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