SAP Concur

Frequently Asked Questions | EXTERNAL

Concur Request

NextGen UI for Concur Request

Updated: September 2021

The continued evolution of the Concur® Request solution user interface experience is the result of thoughtful design and research that provides a modern, intuitive, and streamlined experience for the request process.

This FAQ is also available in Japanese.

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FREQUENTLY ASKED QUESTIONS

Why are you updating the Concur Request user interface (UI)?

The continued evolution of the Concur Request user interface (UI) helps users of all types easily understand what they need to do and how in order to get their requests submitted and approved to 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 expected expenses and having these at the same level.
- 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 Request only applies to Concur Request 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 updated Concur Request UI?

Yes, all customers are required to transition to the updated Concur Request 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.

All remaining customers will be moved automatically starting October 1, 2022. 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 Request here.

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. While enabling the NextGen UI for Concur Request is easy (see below), transitioning users to a different experience can be challenging. The NextGen UI is intended to be more intuitive and streamlined, and we are excited to share upcoming in-app user assistance to help guide users through the updated UI (more information below). Once users get started, they will be on their way in no time. We have detailed documentation for Concur Request administrators on how to enable their users on the updated user interface, along with additional configuration items to consider. As we continue to innovate, like all of our solutions, our administrator and user guides will be updated.

- Professional: Documentation / Admin Guide / User Resources / User Guide
- Standard: Documentation / Admin Guide / User Resources / User Guide

You can also 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 Expense (if applicable)?

Concur Request and Concur® Expense 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 Expense, please visit our FAQ.What new features will we be able to take advantage of with the NextGen UI?

Now and in the future, certain enhancements will only be released on the updated Concur Request UI, meaning that your organization must transition to the NextGen UI for Concur Request before being able to use the new / enhanced feature.

Below is a list of major features that will only be release on the updated UI. Consider your organization's timeline carefully if you want to use one of these features sooner or later.

- The Concur Request homepage provides a new way to list all active requests. The updated user experience based on color code and bold text enhances the user experience and helps users to easily identify key information.
- The Request Details menu is the main source for Concur Request content. This menu gives the user access to the Request Header, Audit Trail, Timeline, and other add-ons like Cash Advance.
- Budget service: With the NextGen UI for Concur Request, customers who have Budget can review and track spending within Concur Request. Review Budget documentation for more information.
- New Travel Allowance Service (initially for net-new Travel Allowance customers only)
- New Mileage Service (initially for net-new Mileage Service customers only)

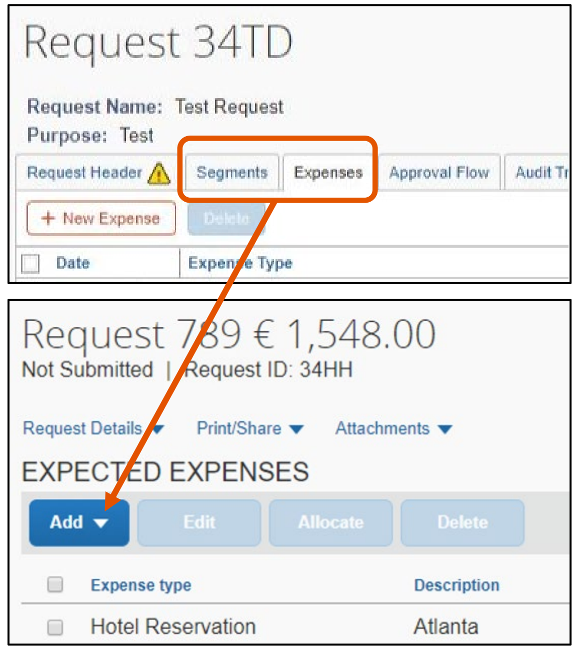
Are there features that are not yet available in the NextGen UI?

Yes. Consider the features that are not yet available on the updated UI before transitioning. There is a list of features that are not yet available, as well as a handy tool to help you decide what groups to transition over and when. However, the vast majority and most-used features are now available.

What exactly is changing?

Our NextGen UI for Concur Request improves the overall efficiency, usability, and accessibility from our previous UI.

A major improvement is the removal of the "tabbed" view that requires a user to click on each tab for different items on the request header, segments, expected expenses, approval flow, and more. Items are now combined in single, easy-to-use drop-down menus that are grouped intelligently, with clear action buttons for managing the request.



Other important improvements can be found in these areas:

- Manage Requests / View Request
- Request Details Menu
  - Updated Timeline and Audit Trail
- Expected Expenses (Combined Expenses and Segments)
- Common set of icons with Concur Expense
- Request Header
- Additional Comments View
- Cash Advance

For a detailed list of all changes, please refer to the User Guide. This guide will be continually updated as new features become available so please refer to this online document for the most recent information.

How do we get started?

As of July 2, 2020, there are two possible scenarios through which your organization can transition to the NextGen UI for Concur Request. Align with any colleagues who administer Concur Expense, if applicable.

How To Transition Users to NextGen UI

Check this first >>>	If Request Administer can view the "Administration > Request > User Experience Settings" page	If Request Administer can NOT view the "Administration > Request > User Experience Settings" page
General situation	Generally, this applies if you transitioned any users to the NextGen UI for Concur Expense or Request prior to July 2, 2020.	Generally, this applies if you did not transition any users to the NextGen UI for Concur Expense or Request prior to July 2, 2020.
Transition scenario	You are on a **hybrid model** since you previously enabled the NextGen UI for some users. You will use two separate pages to transition additional users (if you have both Concur Request and Expense). If you want to be able to use one page and move to the unified model, please submit a Support Case. This would also allow the ability to transition by group for Professional edition for Concur Request.	You are on a **unified model**, only using one page to transition your users regardless of the solutions you have.
How to transition Concur Request users	Follow this path: Administration > Request > User Experience Settings. See screenshot below. Request Admins can enable by user or the entire organization.	Follow this path: Administration > Expense > User Experience Settings. See screenshot below. • Professional: Request Admins can enable the organization or any subset of users • Standard: Request Admins can enable themselves or the entire organization only Note that even if you do not have Concur Expense, this same path applies

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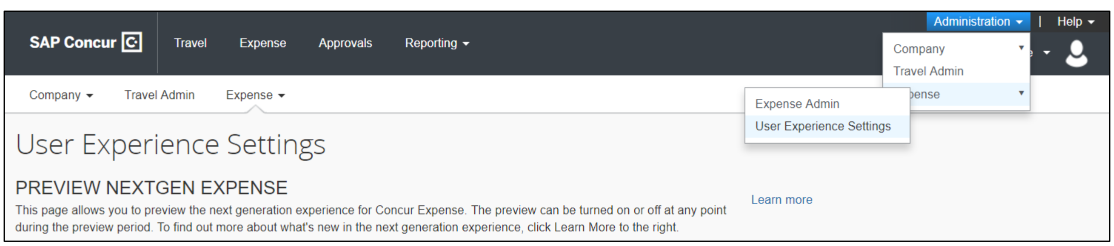
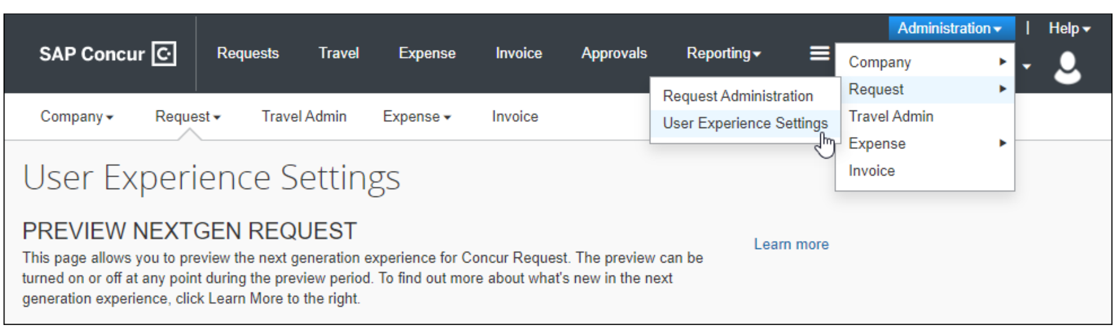
Check this first >>>	If Request Administer can view the “Administration > Request > User Experience Settings” page	If Request Administer can NOT view the “Administration > Request > User Experience Settings” page
How to transition Concur Expense users (if applicable)	Follow this path: Administration > Expense > User Experience Settings. See screenshot below. • Professional: Request and Expense Admins can enable the entire organization or any subset of users • Standard: Request and Expense Admins can enable themselves or the entire organization only Note: this page will not transition Concur Request users even though it states so because you are on the hybrid model. See above to transition Concur Request users.	The path above impacts both Concur Expense and Concur Request users. Use Administration > Expense > User Experience Settings page. See screenshot below.
How to transition back, if needed.	Use the same tools to return to the current UI as you used to turn on the NextGen UI.	Use the same tools to return to the current UI as you used to turn on the NextGen UI.

Administration > Expense > User Experience Settings



Administration > Request > User Experience Settings (only viewable by hybrid model customers)



Note these Professional edition screenshots are different for Standard customers.

How are you communicating about the NextGen UI?

As we are providing a long runway for customers to transition, we plan to communicate throughout the active move period. In-product messaging directed to administrators will also be starting as part of our communication plan.

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

Yes. We will continue to innovate the NextGen UI for Concur Request. Our regular update and release note process will continue. The features not yet available document and release notes will continue to be published on a regular basis. It is possible that some enhancements are released in additional cycles outside of the monthly release cadence. The limited access release information is published here. Once we get closer to the automatic transition date, all release notes are planned to be published along with all our regular release notes.

What will the user experience be when we transition over?

The first time a user opens Concur Request after the Request Administrator transitions the user or organization to the NextGen UI for Concur Request, the user will see a notification message welcoming the user to the NextGen UI for Concur Request.

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

Requests 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 request process with no interruption. Users can continue to work on the current Concur Request 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.

Is there any change in functionality?

Concur Request functionality is the same, meaning that your existing configuration for policies, groups, custom fields, segments, expenses, and more will be used the same way.

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 request.

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

The approver view in Concur Request is being updated with the NextGen UI. This is not only to 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 and Processor are 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 view the data has changed. Users can take any action on either UI during the transition period.

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

There will be no impact to any backend processes or reporting.

How might this impact any custom translations or labels?

This should not impact any translated labels that are already in place. Please note that custom text on alerts are plain text only. This is not a change from what is currently supported on the current UI.

How are test sites being moved to the updated UI?

When they are released, the same tools available to Request Administrators will be available on test sites. Deploying the NextGen UI for Concur Request in your test site will not impact your production site. Any test sites that have not been moved by October 1, 2022 will be moved automatically on or after that date.

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 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 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 any other questions, reach out to your SAP Concur account team.

Learn more at concur.com

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