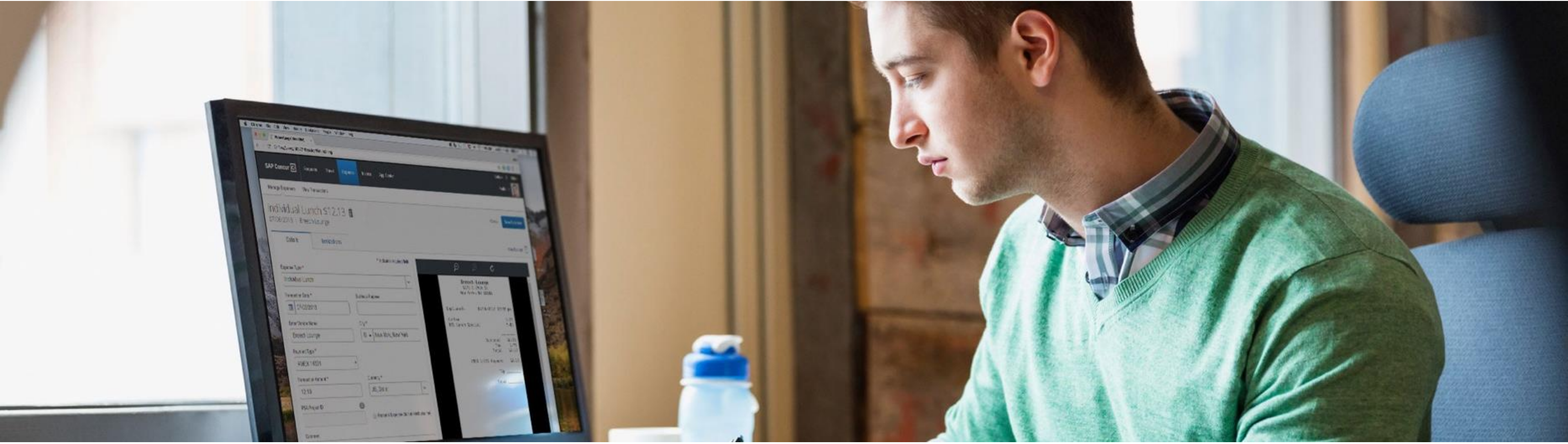


SAP Concur

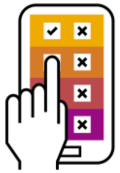
NextGen UI: Key Features and Tips for a smooth migration

INTERNAL

THE BEST RUN SAP

Some background on the WHY new UI….

Benefits



USABILITY

Our more intuitive UI makes it significantly easier for users to learn, leading to quicker adoption and fewer escalations to admins and support.

EFFICIENCY

Testing shows that users spend less time on expense reports, allowing them to get back to their tasks faster.

ACCESSIBILITY

In line with our Accessibility Vision Statement, the improvements we're making to our UI strive to meet WCAG 2.0 guidelines of accessibility.

NextGen UI Client E-Mail Communication

SAP Concur

Introducing the NextGen UI for Concur Request

We want to introduce you to the evolution of the (UI) and announce that we are moving into our o for Concur Expense and Concur Request. Additi users who are already on the NextGen UI, we ar experience on September 15, 2020, moving only UI for both solutions.

Introducing our NextGen UI for Concur Requ

Our NextGen UI for Concur Request helps users what they need to do and how in order to get the approved to get back to business. Our NextGen areas:

- **Usability:** easier to learn and more intuiti and higher satisfaction
- **Efficiency:** optimized task flows to save segments and expected expenses.
- **Accessibility:** provides a more approach visual, auditory, motor, cognitive, or spee more inclusive.

SAP Concur

THE BEST RUN SAP

Opt-in Period Begins for Updated User Interface

We are pleased to announce that our Concur Request user interface (UI) ha this period, it's optional for you to tran with a long transition window.

We have invested significantly in impr response to your feedback. At the sar UI to include Concur Request. Our ne updated UI by default.

You may have previously explored the users, but we want to share this upda the next phase. If you've already mov NextGen UI, you may disregard this n

SAP Concur

THE BEST RUN SAP

Moving to the Updated UI Concur Expense and Cor Request

Note: If you do not manage your Concur Expense message to an appropriate colleague.

We're excited to announce that we ha transition date for the updated Concu interface: October 1, 2022. Make your you can in alignment with your business and an enhanced user experience.

SAP Concur

Make the Move to the New Concur Expense & Concur Request UI

Note: If you do not manage your Concur Expense or Concur Request solution, please forward this message on to an appropriate colleague.

The time is now: make the move to the NextGen UI for Concur Expense and Concur Request user interface. All remaining customers who do not move on their own by October 1, 2022 will be transitioned automatically.

Give it a try yourself or turn it on for the whole company – you are in control.
In response to your feedback, we have significantly improved the feature set and stability of the product. We expanded the updated UI to include Concur

NextGen UI for Concur Expense and Concur Request

As of September 2021, we are entering our active move period for the NextGen user interface (UI). It's ready for you to finish planning your transition and move as early as you can.

All customers will be required to move before October 1, 2022.

Timeline

July 1, 2020
NextGen UI opt-in period begins for Concur Expense and Concur Request

September 2021
Announce automatic transition date for NextGen UI

October 1, 2022
Customers who have not yet moved will be moved automatically to NextGen UI

Next Steps

Review the resources on the next slide

Plan your move to our improved UI

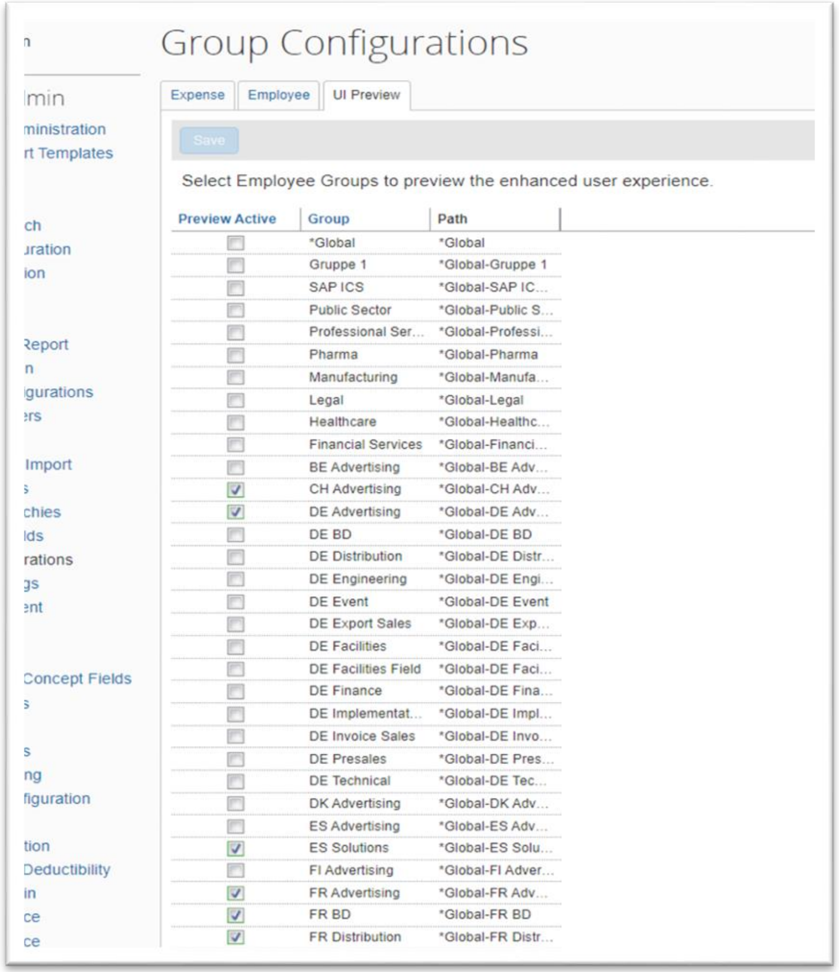
Deploy NextGen UI in your organization

How do we get started with moving to the NextGen UI?

Next Steps

Review the resources on the next slide → **Plan** your move to our improved UI → **Deploy** NextGen UI in your organization

- Watch videos and read documentation provided
- Plan activation per wave – ATTENTION can be activated per user group or per User
- Get in touch with your CIP
- Open a Case



Most important document

See resource center below

Information Sheet | PUBLIC

Faster, Smarter Expenses: Everything You Need to Know About The New SAP Concur NextGen

The new and improved Concur® Expense and Concur Request Experience offers a clean design focused on intuitively guiding users to the next step. It **empowers your business** to drive more value from your investments, boost efficiency, and focus on what's important.

We Listened! Your Upgrade is Available!

The updated UI is the direct result of user research, data analytics, rigorous testing, and offers a significantly improved, guided user experience with added functionality.

More mobile-centric customers wanted a singular experience across all devices, so we've included mobile parity in the new UI. We know that more employees want to travel by car, so we've included a new Mileage Service which provides users with automatic, government-directed mileage rates and taxability support.

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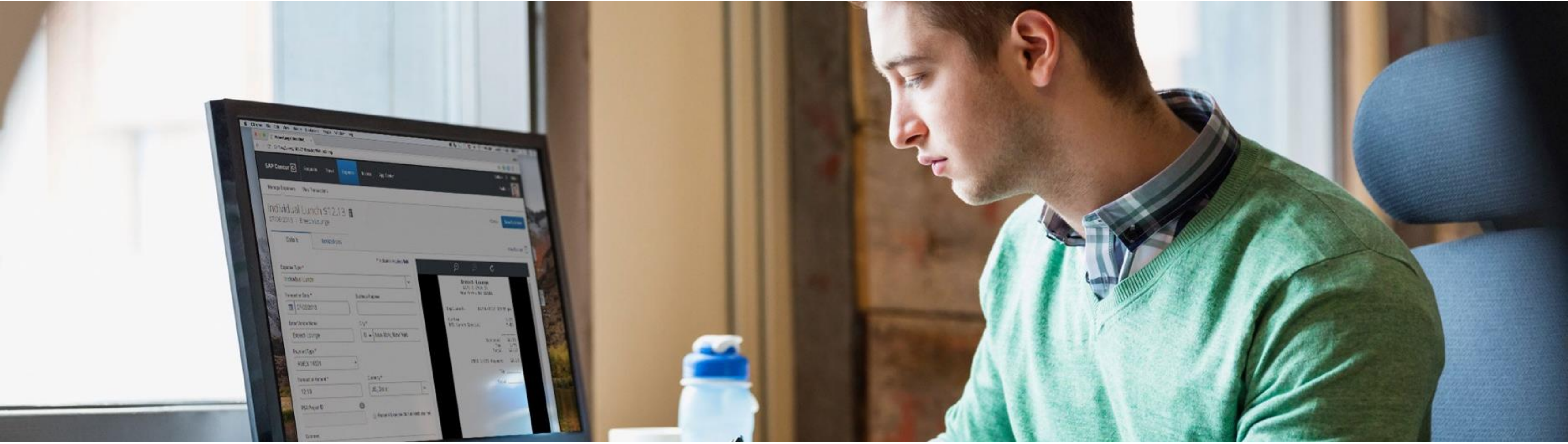


SAP Concur

NextGenUI

What to expect, what has changed?

INTERNAL

THE BEST RUN SAP

Important Changes

New UI (User Interface) for Expense and Request

Expense

- Concur Expense landing page
- Expense Report page
- Expense Entry page
- Itemizations
- Attendees
- Allocations
- Report Menus
- Other:
  - Requesting Travel Allowance, Matching/unmatching expenses, Exception Messages, Report Totals

Request

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

NextGenUI only Functionality - Expense

- Hotel itemization wizard improvements
- User onboarding screens for trip-based Expense Assistant
- Multiple expenses linked to one receipt
- Delta posting for organizations using the SAP Integration to Concur
- Receipt Digitalization for France and Spain
- Japan Public Transport 2.0. (released in April 2022)
- New Travel Allowance Service* - TAS (initially for net-new Travel Allowance customers only)
- New Mileage Service* (initially for net-new Mileage Service customers only)

* See slide “considerations” for additional information

NextGenUI only Functionality - Request

- Automatic creation of an expense report from an approved Request
- Concur Request homepage
- Request Details menu
- Budget service - review and track spending within Concur Request
- New Travel Allowance Service* – TAS (initially for net-new Travel Allowance customers only)
- New Mileage Service* (initially for net-new Mileage Service customers only)

- See slide “considerations” for additional information

Considerations

- New UI only impacts the view of the employee creating / submitting the request and/or expense report – Approver and Processor views will remain unchanged for now
- Travel Allowance
  - Legacy TA (Travel Allowance) will work with New UI
  - Migration of Legacy TA (Travel Allowance) Clients currently not in scope
  - Clients with existing/legacy TA can implement new countries on new TAS (Travel Allowance Service) – both forms of Travel Allowance can co-exist (hybrid) in the same entity
- Mileage Service
  - New Service offering providing best practice government mileage rates for multiple countries
  - Only available for NetNew, currently no migration path for existing clients
  - Legacy Mileage and new Mileage Service cannot co-exist in the same entity – no hybrid option

Features not yet available in NewGenUI

Expense

- Authorize Salesforce Connector for a new user (Q2)
- Detail view: Configurable view or Expense List (Q2)
- Expense Type as first level of connected list (Q2)
- Cost Object view of report timeline (Q3)
- Copy down Attendees to itemization (Q3)
- Improved Approver View (PD)
- Moving personal card transactions from View Transactions page

http://www.concurtraining.com/customers/tech_pubs/NextGenEXP/UpcomingEnhancements.pdf

Request

- Quick search (minor feature)

https://www.concurtraining.com/customers/tech_pubs/NextGenREQ/UpcomingEnhancementsRequest.pdf

Features not available in NewGenUI (discontinued)

Expense

- Quick Expense Entry Grid
- Expense Report (Calendar View)
- Attendees from Outlook
- Drag and Drop receipts
- Manual personal charge card import feature

http://www.concurtraining.com/customers/tech_pubs/NextGenEXP/UpcomingEnhancements.pdf

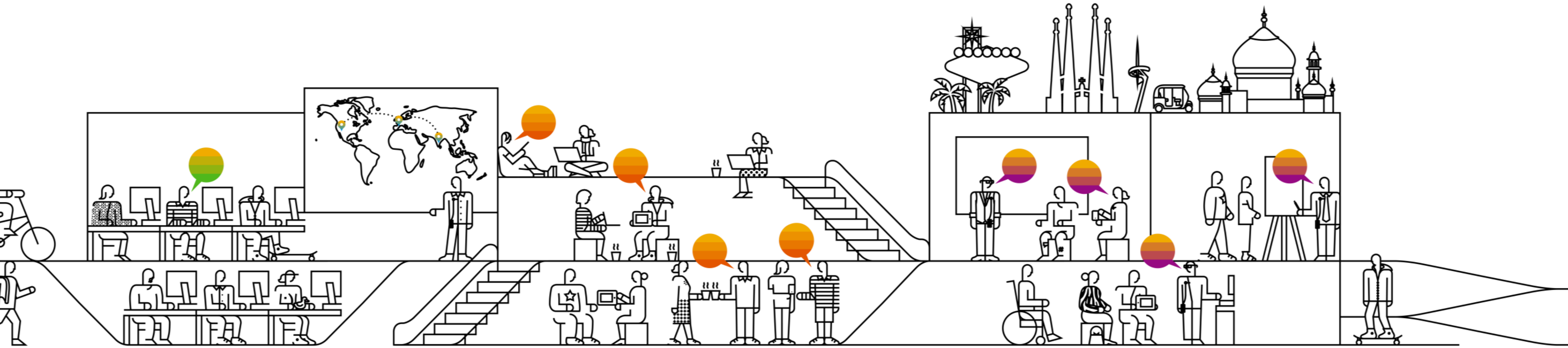
Request

- n/a – not applicable

https://www.concurtraining.com/customers/tech_pubs/NextGenREQ/UpcomingEnhancementsRequest.pdf

Before & After UI Examples

Concur Expense



NextGen Expense In-product Messaging

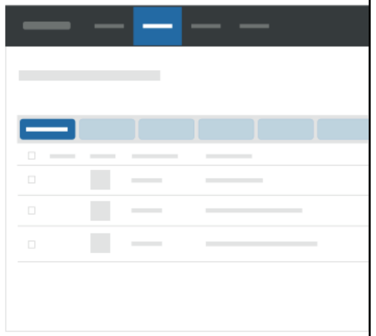
NextGen Expense – Home Page (3 slide product tour):

Get to know the new Concur Expense

We've made a few updates! In the new Concur Expense, you'll notice:

- An improved look and feel.
- Extra space to work.
- Easier access to top features.

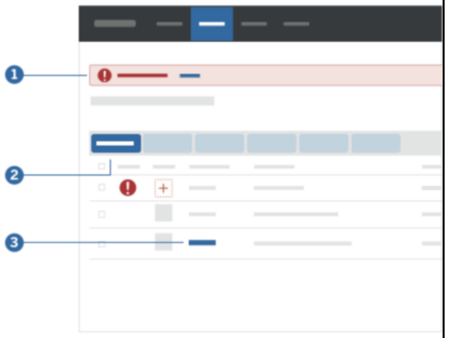
Take a quick tour to learn more.



In an expense report

Now, within a report, you can:

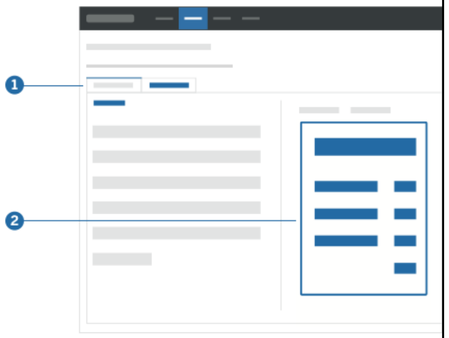
1. Click an alert to go directly to where you can fix the issue.
2. Add or create an expense from a single location.
3. See which expenses have associated corporate card charges ready.



In an expense

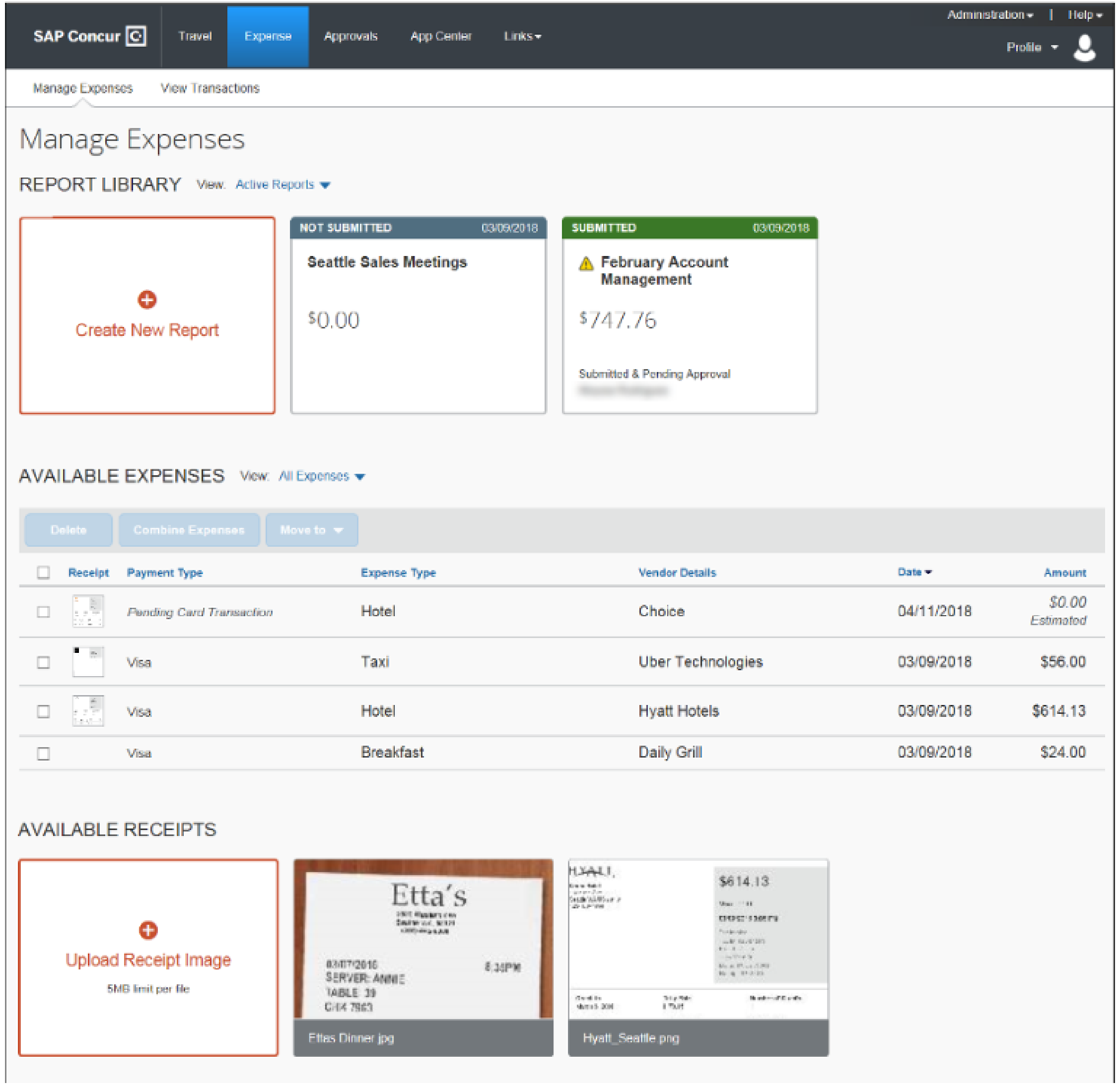
And when you're in an individual expense, you'll be able to:

1. Quickly access advanced features such as Itemizations and Attendees.
2. Easily reference your receipt.



Refer to
[End User Guide]
for full Before/After

Expense Landing Page



When you click the **Expense tab**, the **Manage Expenses** page appears.

It looks very much like the existing user interface.

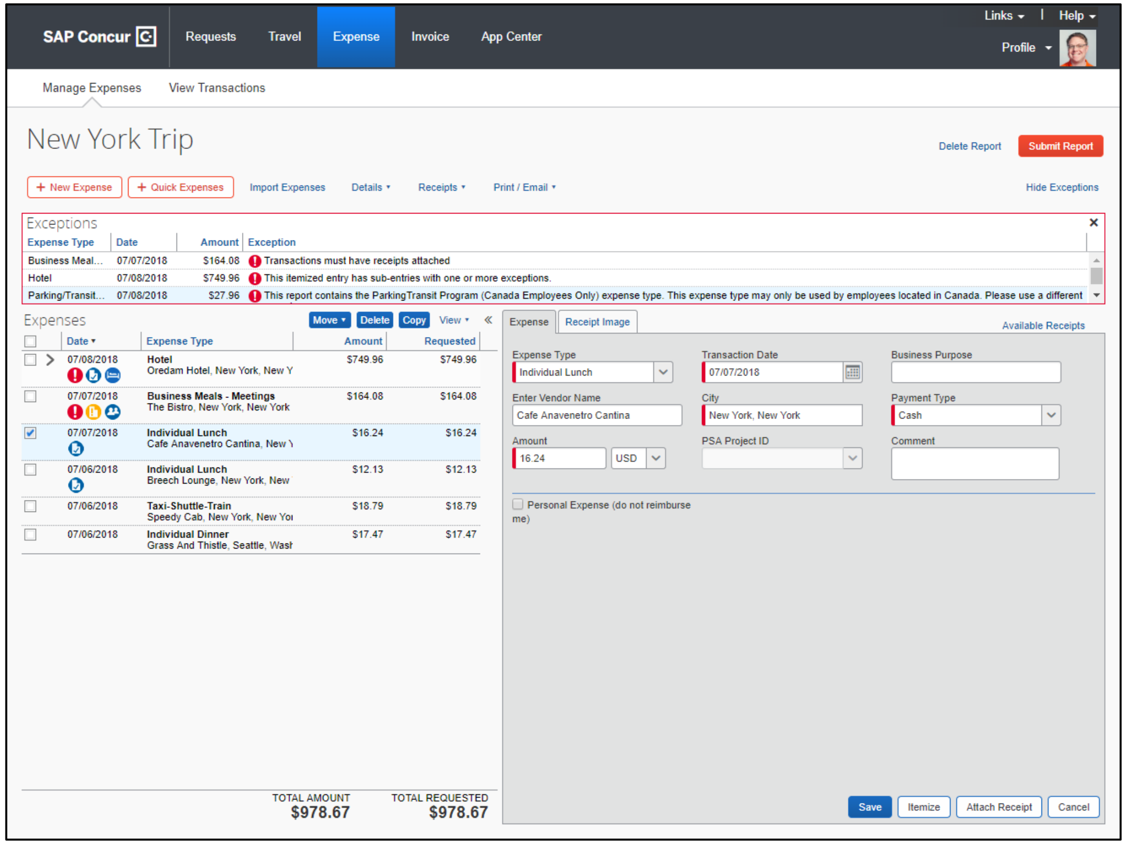
This page has three sections:

- Report Library
- Available Expenses
- Available Receipts

Refer to
[End User Guide]
for full Before/After

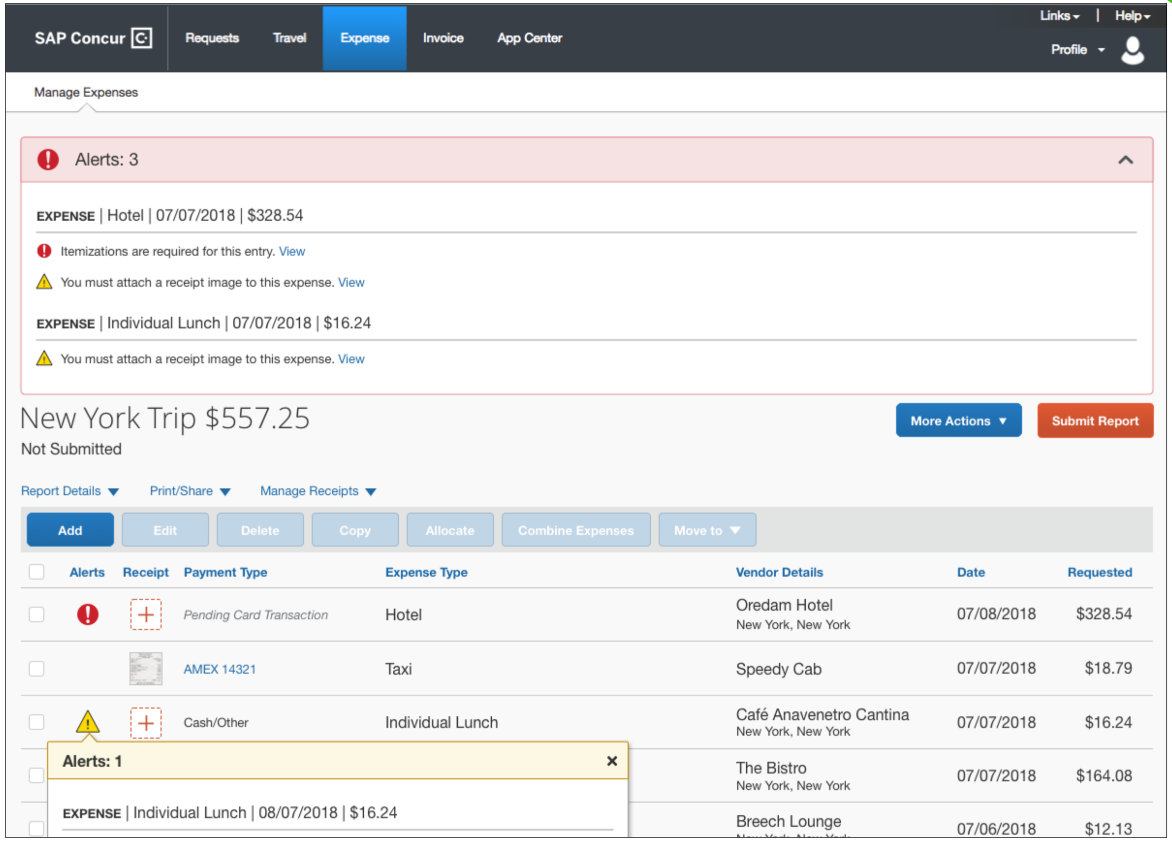
Clean Design Focused on Guiding Users to the Next Step

Before



Old experience had a lot of detail—text and icons—on the page that did not lend itself to helping the user see what the next step in the process of completing and submitting the report should be.

After



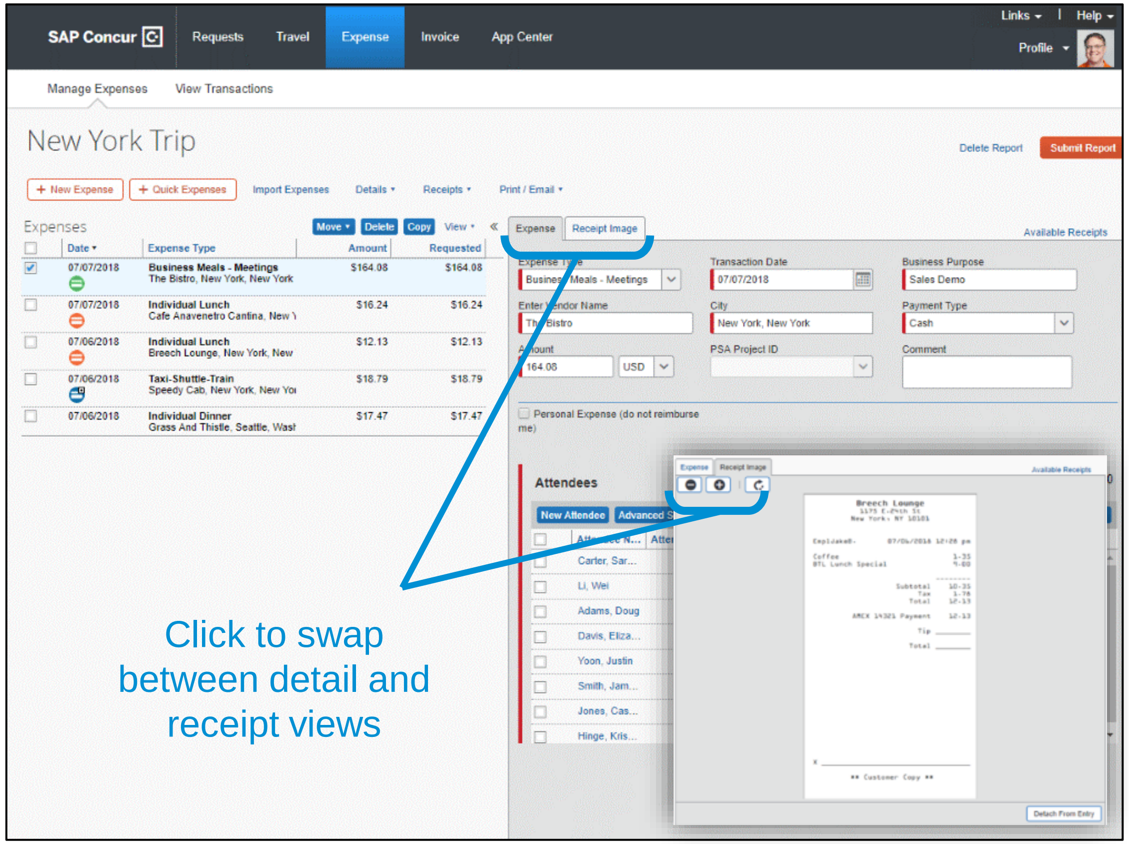
New experience has clean lines that focus the user on the tasks needed to submit the report :

- Add expenses
- Add receipts
- Remove alerts

NEW – Expense Details and Receipt in One View

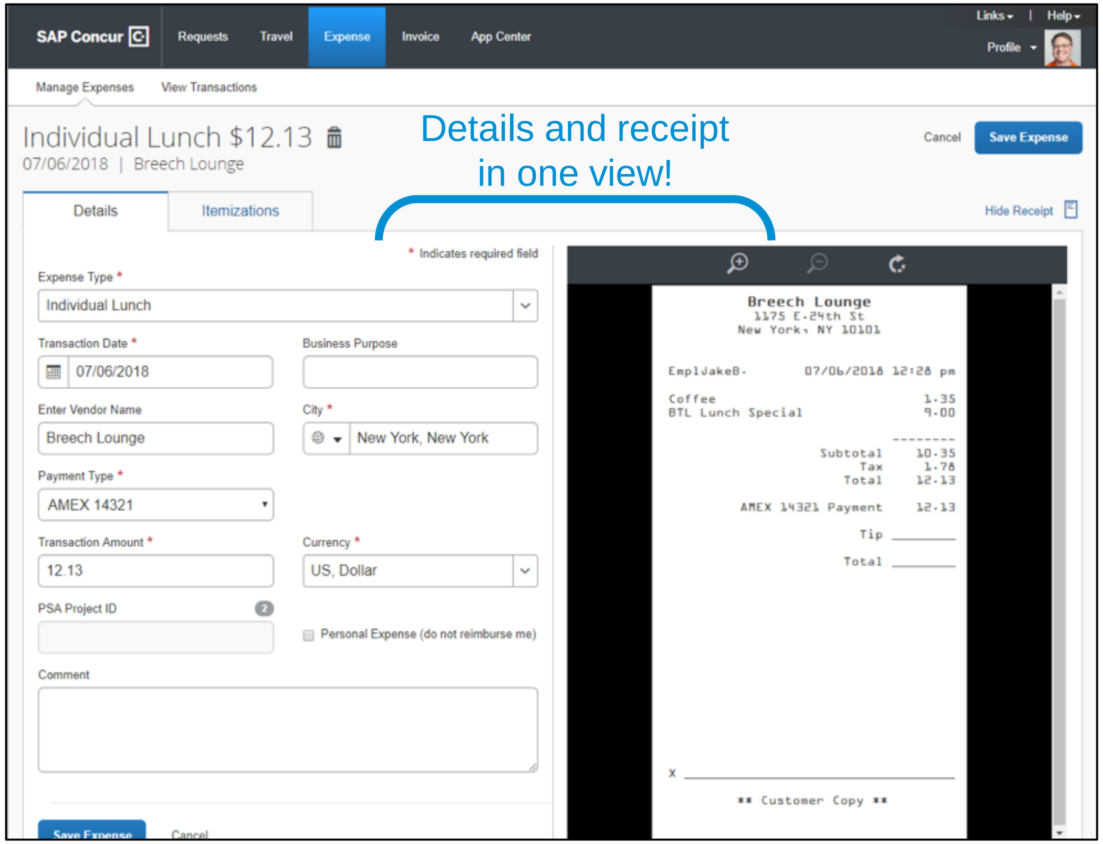
Refer to
[End User Guide]
for full Before/After

Before



Old experience required clicking back and forth between the Expense detail screen and the Receipt Image to know what amounts to enter in each field.

After

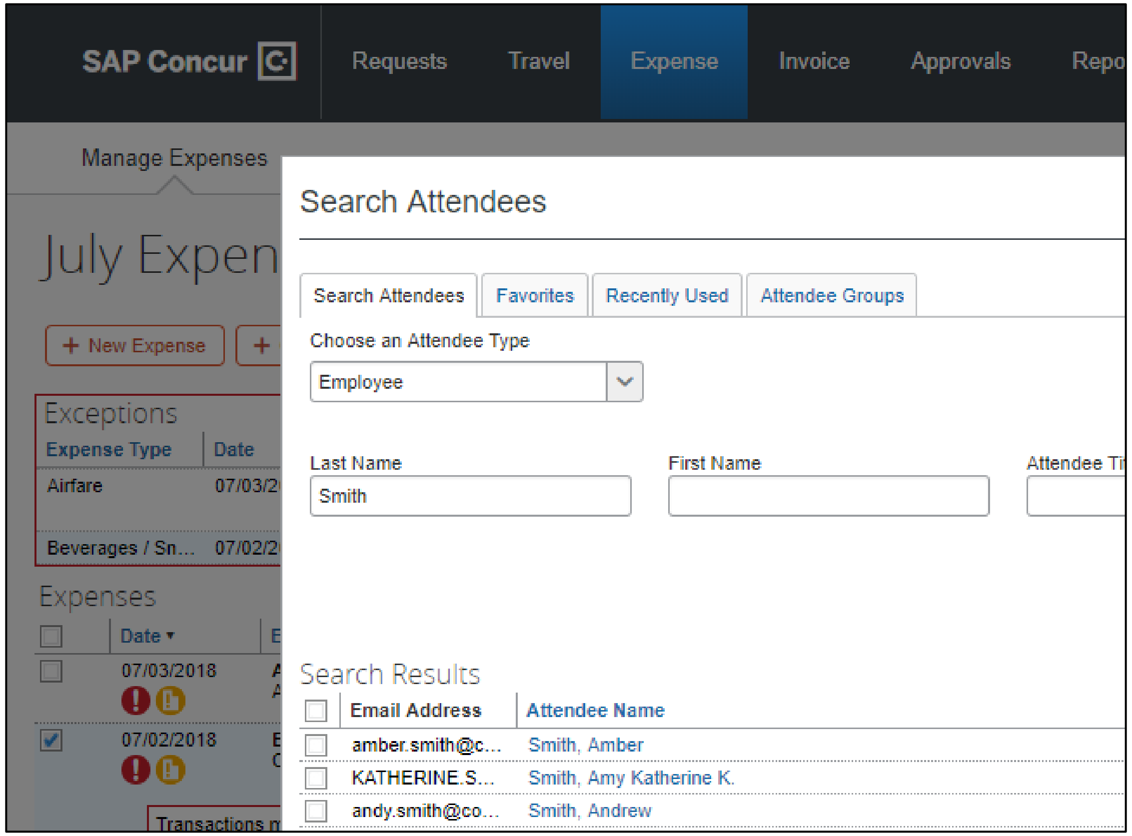


New experience lets you see your Receipt Image next to your Expense details for fast and simple confirmation or entry.

Refer to
[End User Guide]
for full Before/After

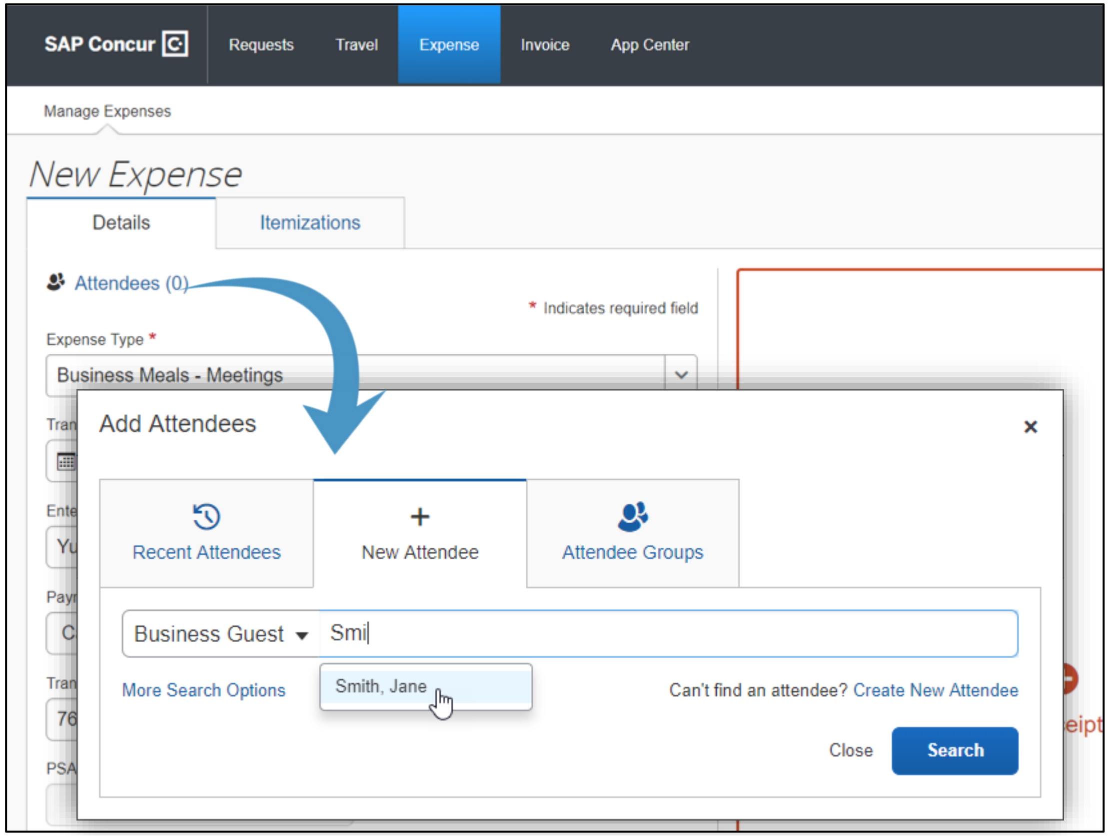
Adding Meal Attendees

Before



Old experience required selecting if you want to add a New Attendee, performing an Advanced Search or choosing from Favorites then searching through a clunky list of results.

After



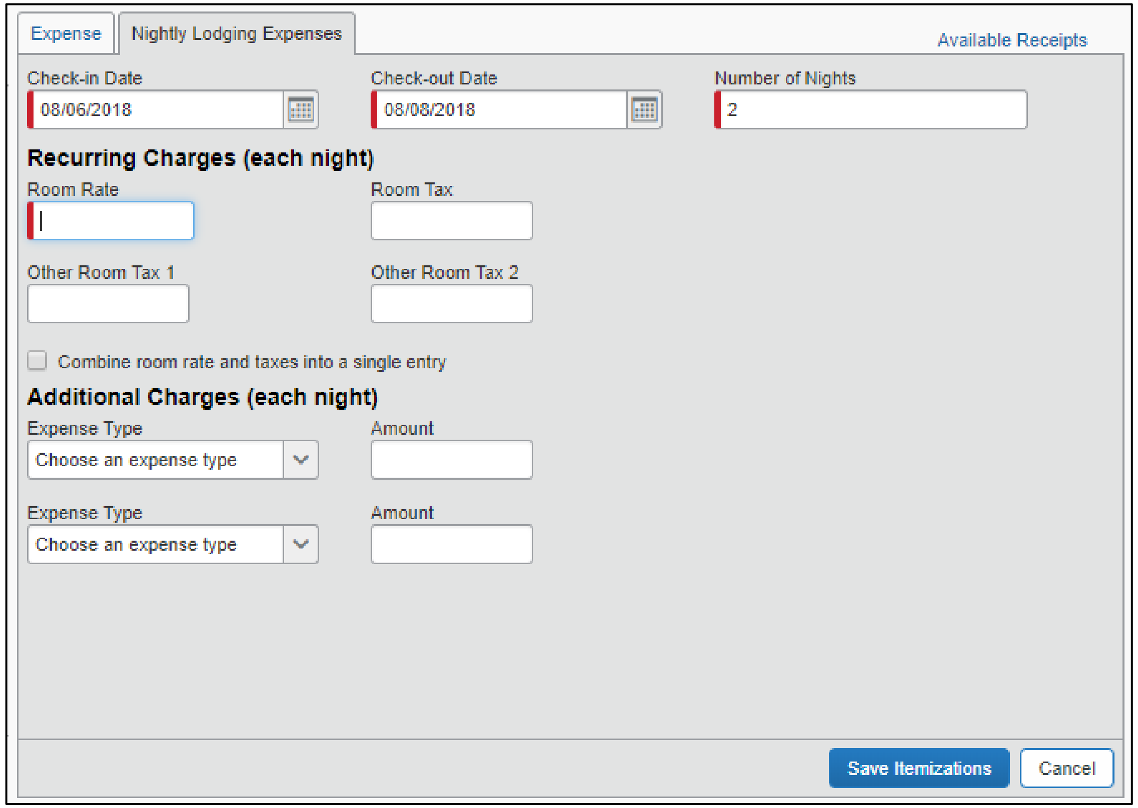
New experience introduces a dedicated page for attendees to:

- Easily add attendees used on recent expense reports
- Use a single search field to find attendees
- Create attendee groups for favorites and regular groups events

Refer to [End User Guide](#) for full Before/After

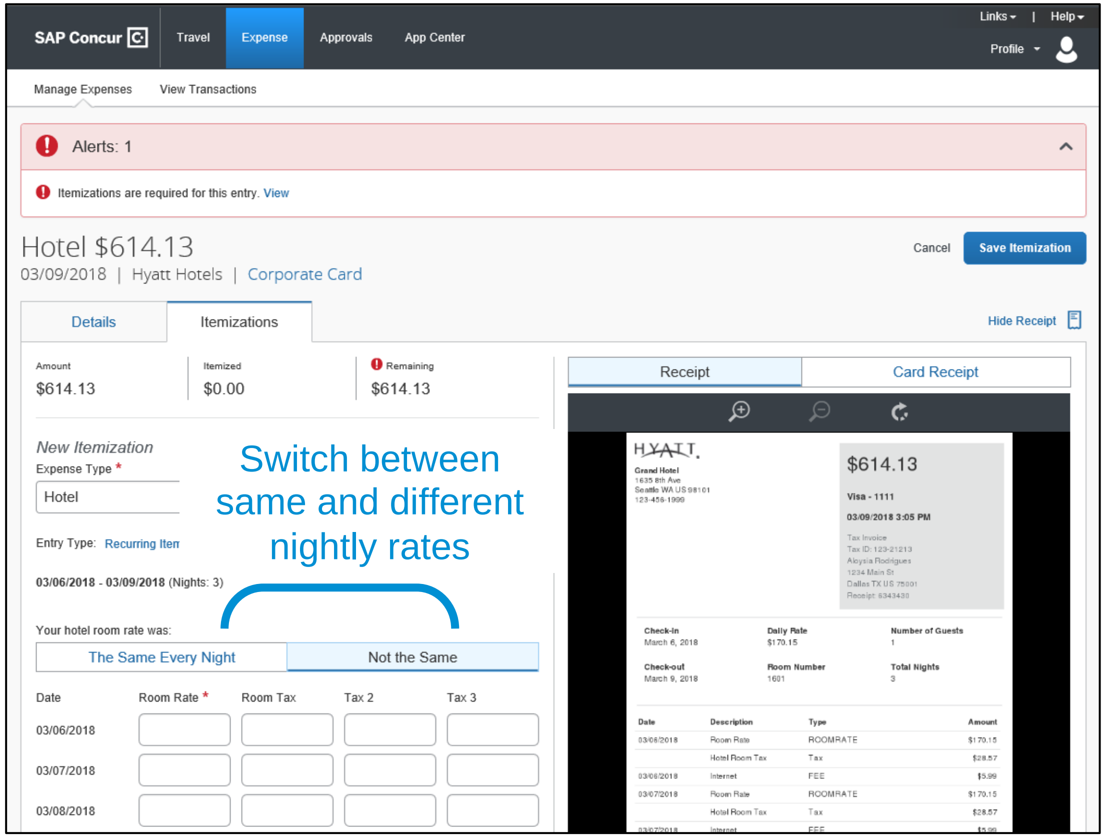
Hotel Itemizations

Before



Old experience required toggling between multiple screens and manually adjusting for multiple nightly rates.

After



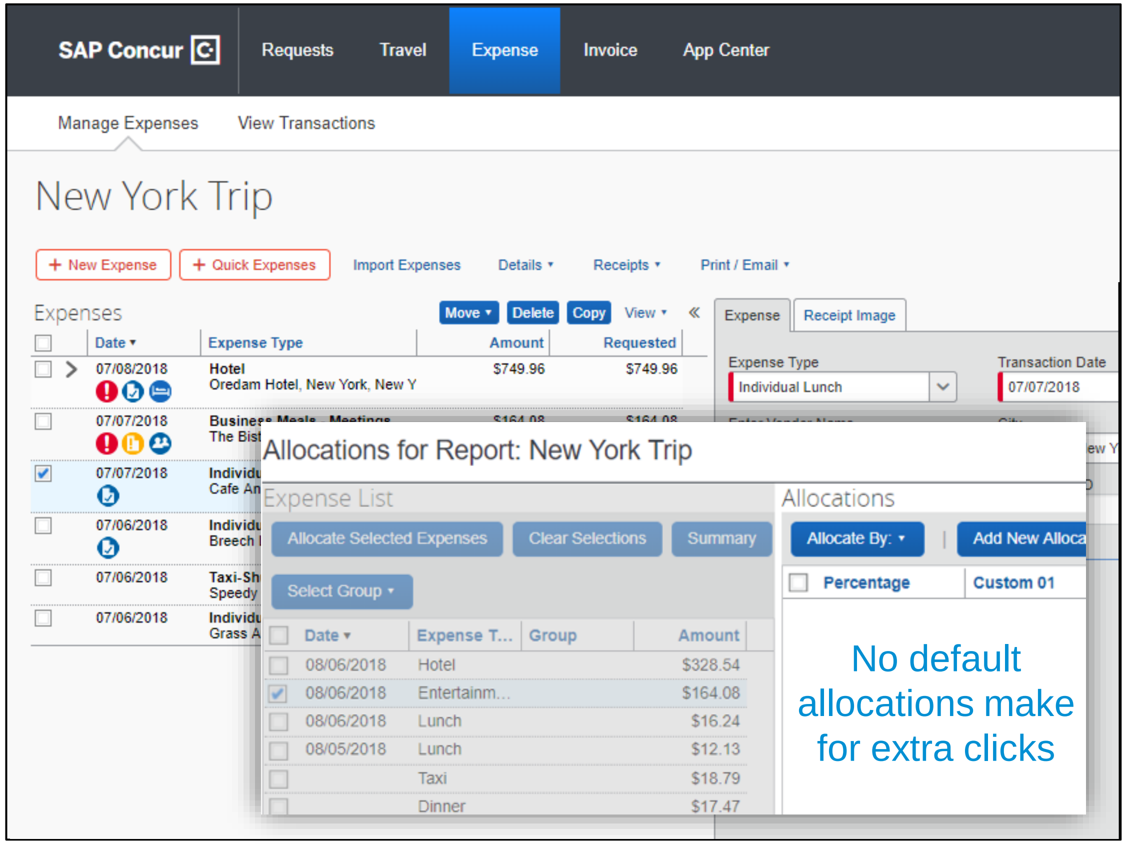
New experience helps users:

- Easily see when itemizations are complete
- Use a table format to enter same or different nightly rates
- See the receipt for faster and more accurate entries

Refer to
[End User Guide](#)
for full Before/After

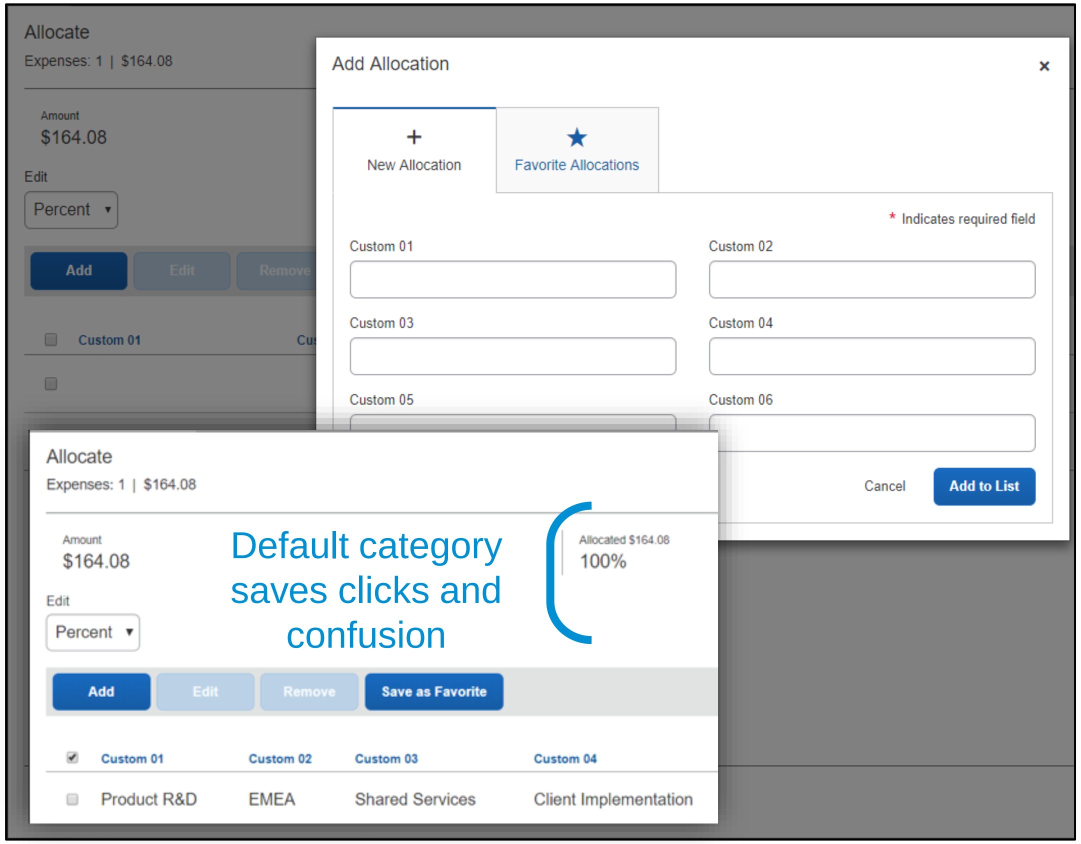
Allocations

Before



Old experience had confusing icons and no default categories making users make perform extra clicks.

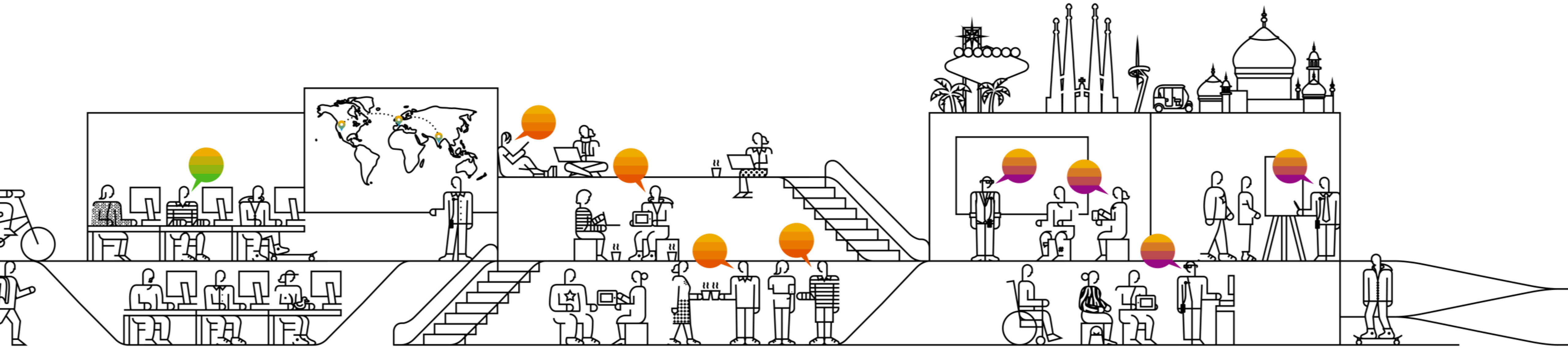
After



New experience has a cleaner look and requires fewer clicks thanks to the ability to set a default allocation category.

Before & After UI Examples

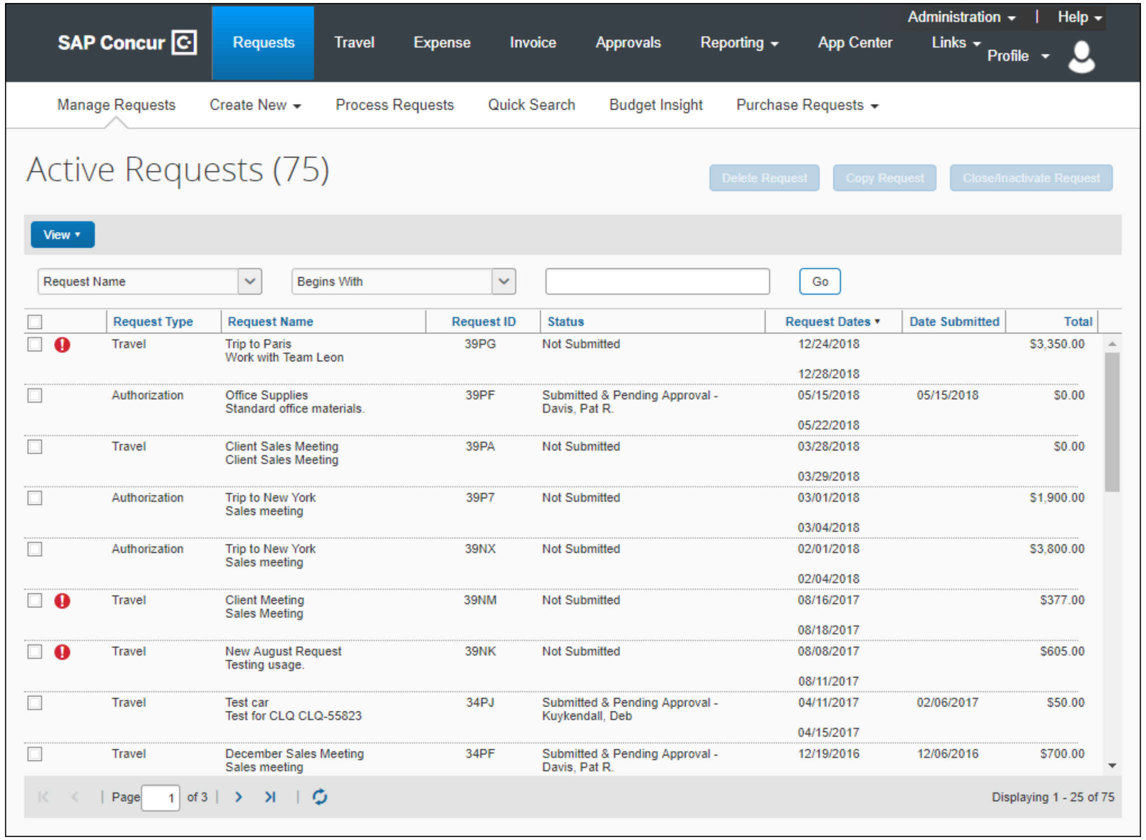
Concur Request



Refer to
[End User Guide]
for full Before/After

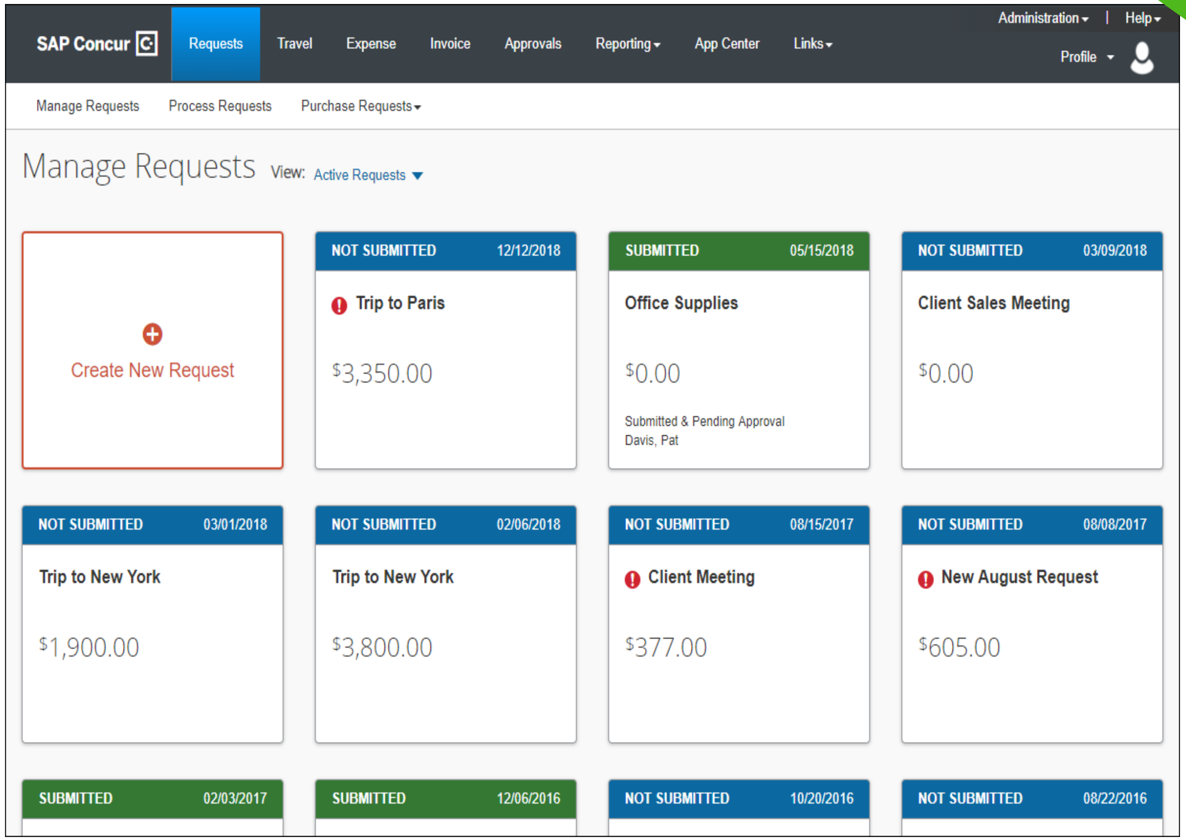
Clean Design Focused on Guiding Users to the Next Step

Before



Legacy experience had a lot of detail—text and icons—on the page that did not lend itself to helping the user see what the next step in the process of completing and submitting the report should be.

After



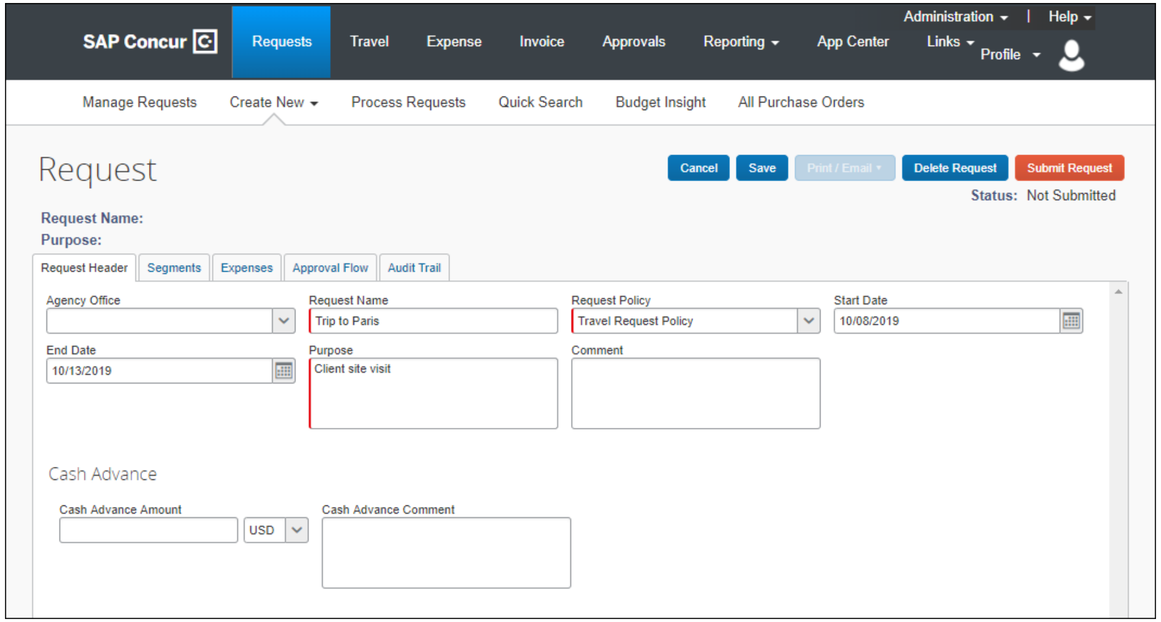
New experience has individual tiles:

- Sorted by date of creation
- Alert Indicator
- Information at-a-glance
- Delete, Copy, Close/Inactivate Buttons

Refer to
[End User Guide]
for full Before/After

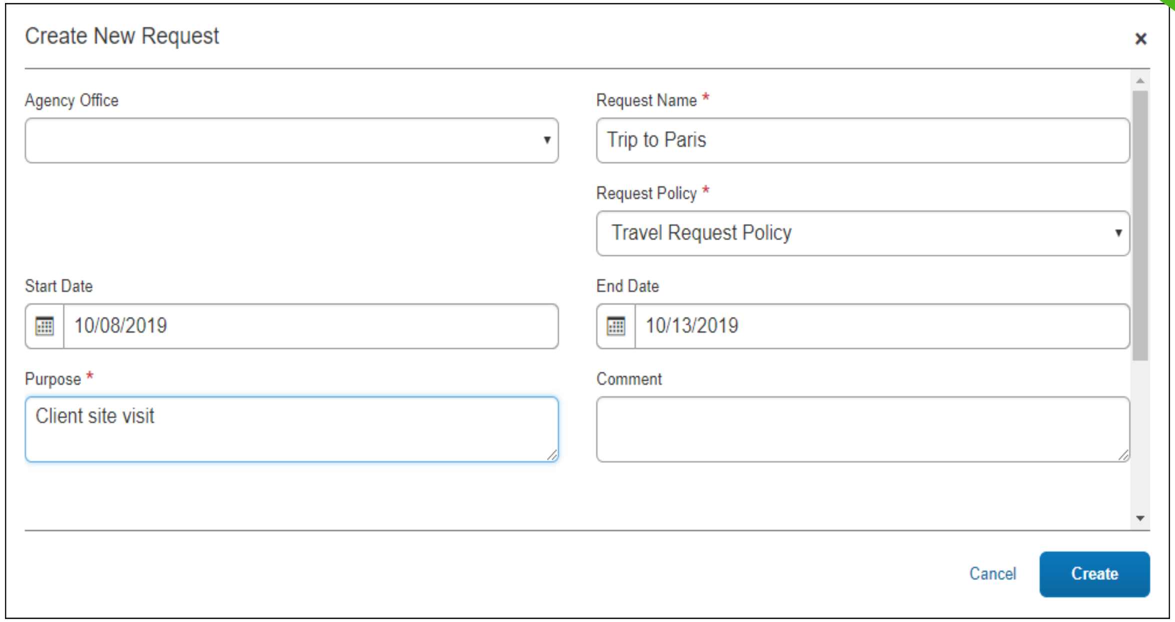
Create New Request

Before



Multiple tabs and fields across the page that can make it seem daunting to submit a request.

After

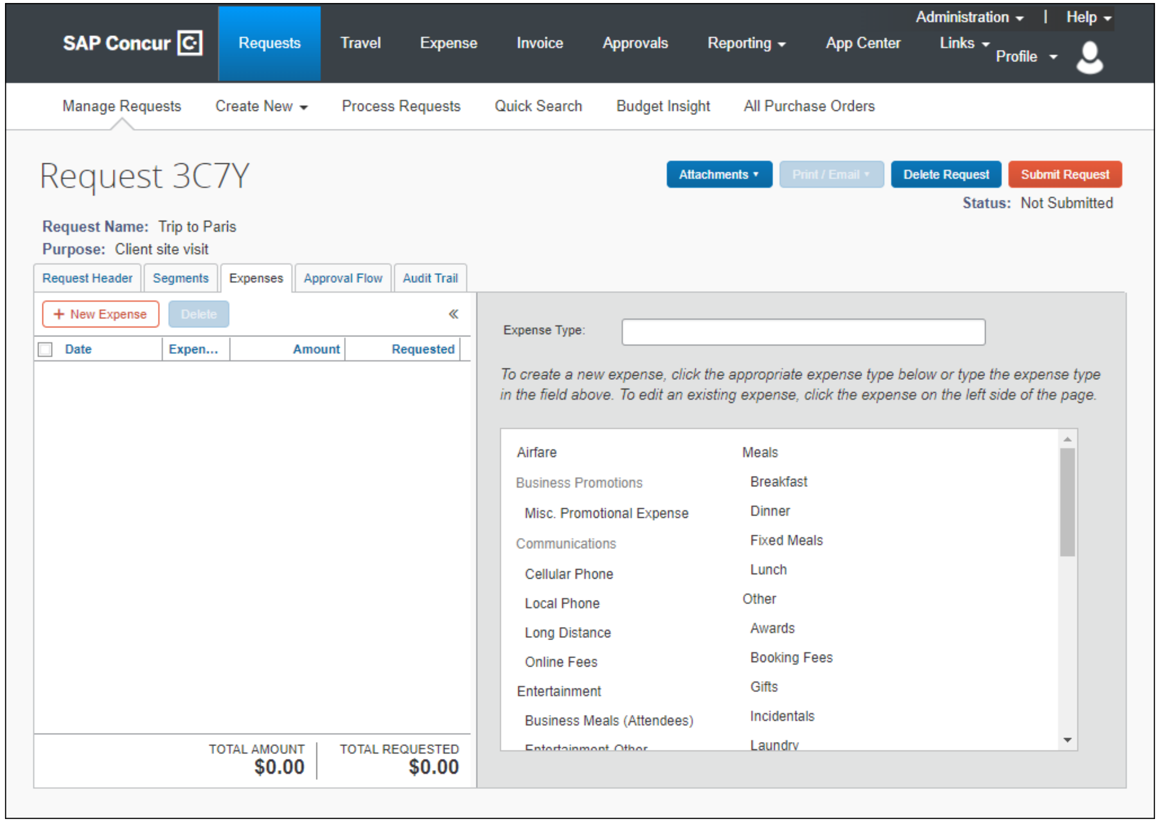


Fields are larger and easier to navigate. The fields that appear on this page are configurable by the customer so appearances may vary.

Refer to
End User Guide
for full Before/After

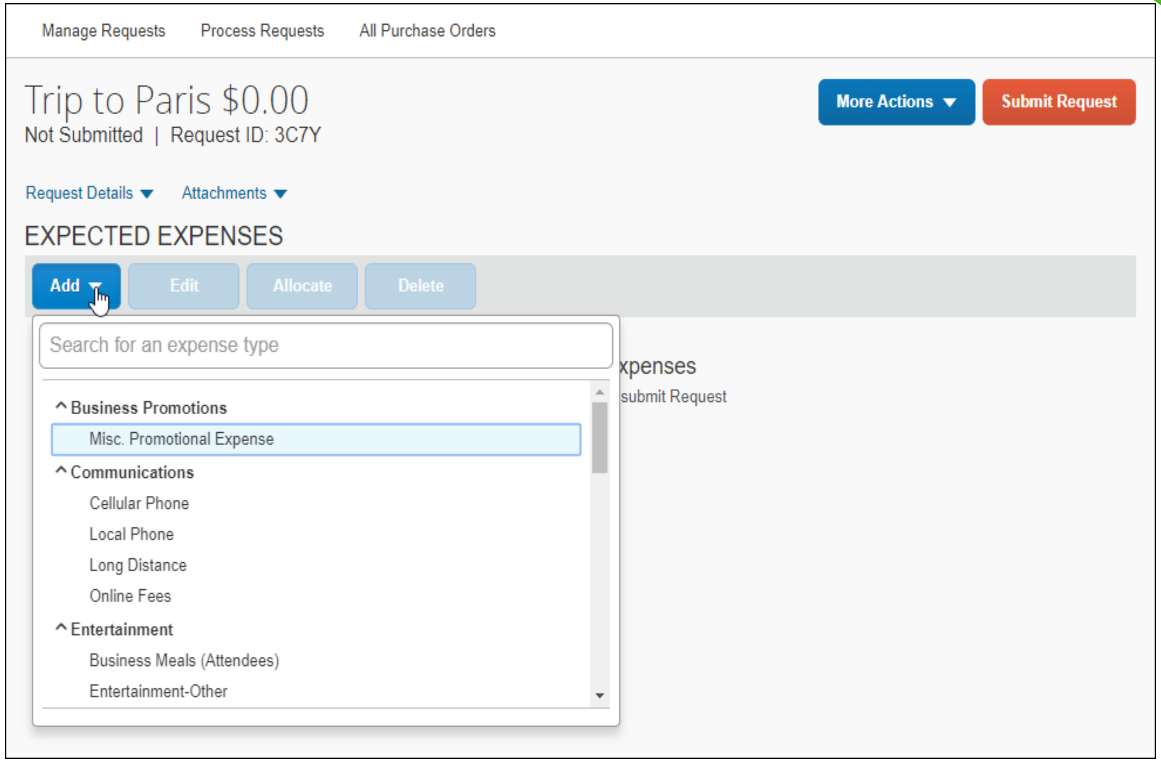
Expected Expenses & Segments

Before



If Expect Expenses feature is enabled, they can be entered on the Expense tab located after the Segments tab. Having a separate tab for adding segments and adding expected expenses can be a confusing process flow.

After

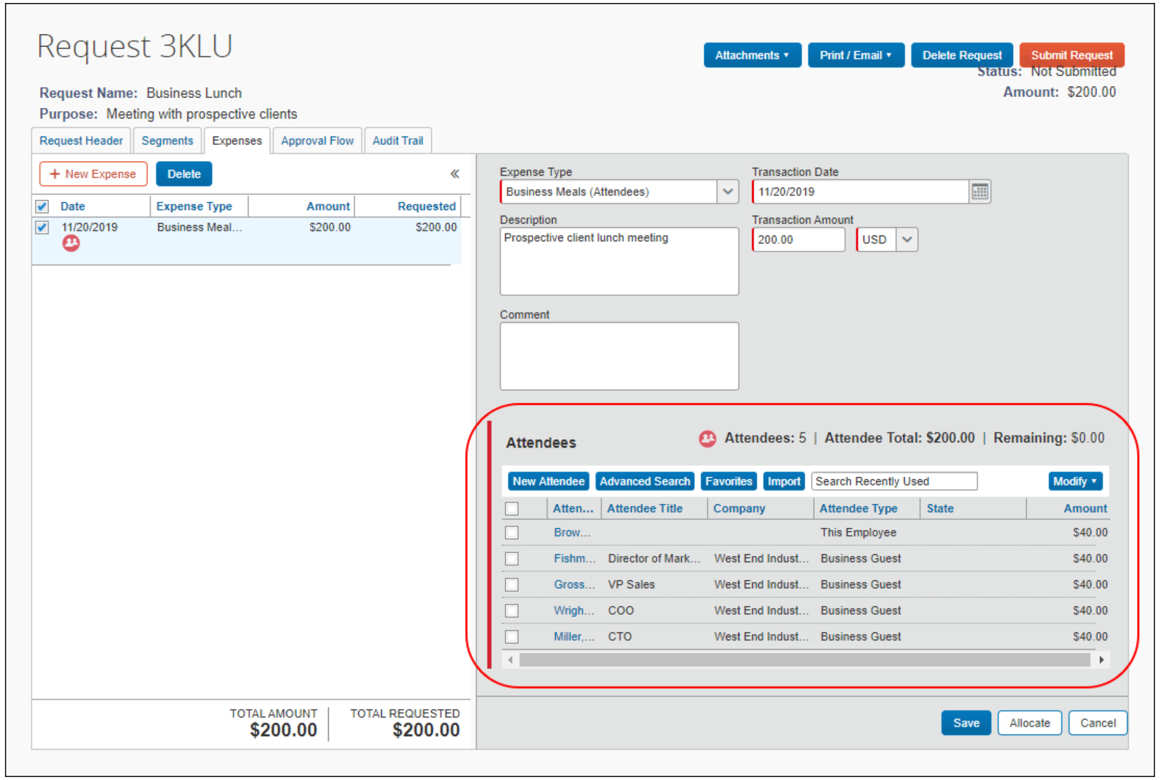


If feature is enabled, the page opens after the user clicks the Create New Request button. This page is cleaner and has fewer sections. The Add button opens up options for expense and segment types in one view, with the ability to search.

Refer to
[End User Guide](#)
for full Before/After

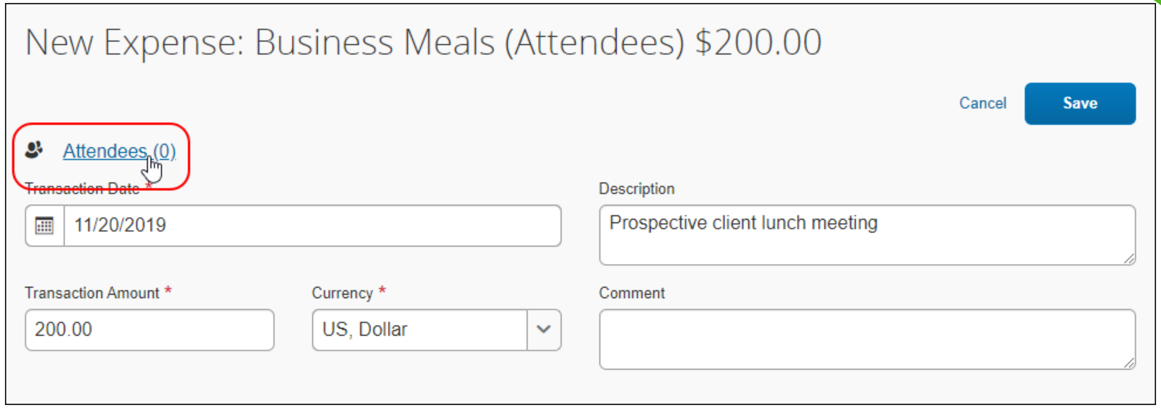
Attendees

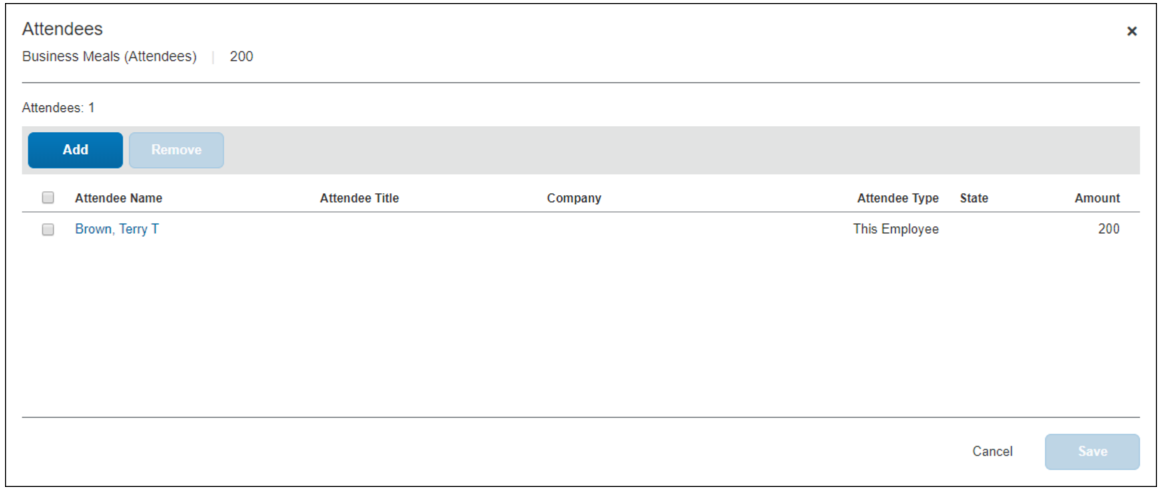
Before



Multiple sections on a single page with a layout that does not intuitively guide the user through the process.

After

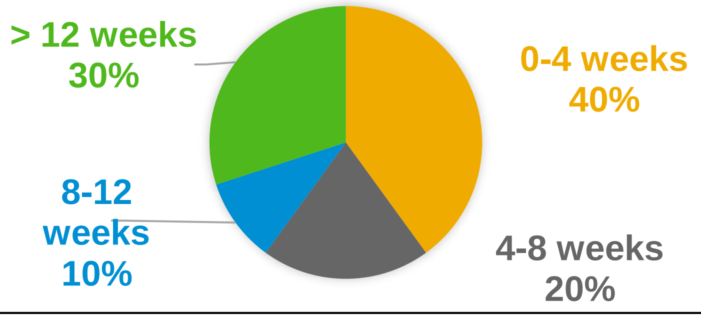




Attendees managed on separate page, providing more workspace for attendees and supporting a cleaner, less confusing experience. Like in the legacy UI, the Attendees feature is only available for expected expense, not for segments.

NextGen UI – some interesting aspects

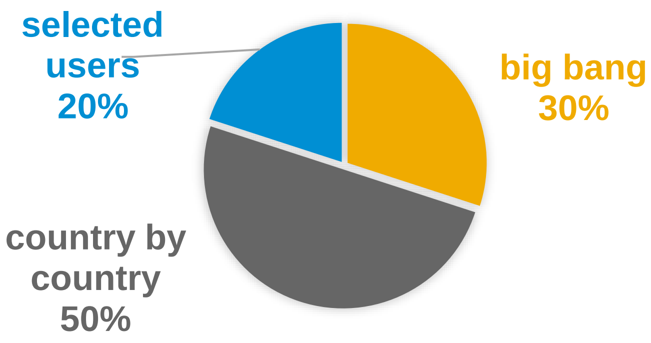
How long did it take you/or you plan it will take you to do the whole change within your organization:



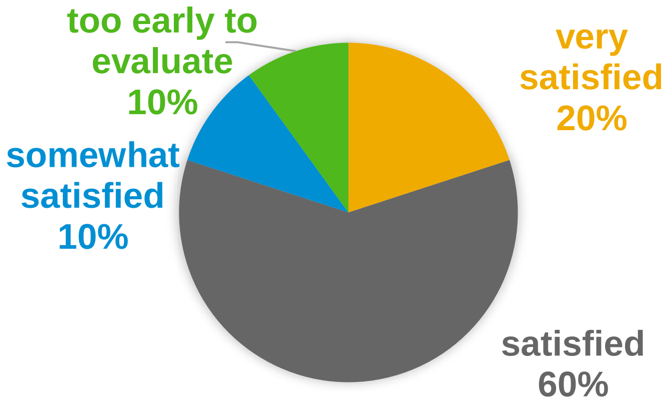
What have you prepared/provided to the end-users? (MULTIPLE CHOICE possible)

78% Created own content (demo videos)
44% Classroom training/ full end-user training
33% Used Concur materials
22% FAQ - One Pager
0% No materials were provided

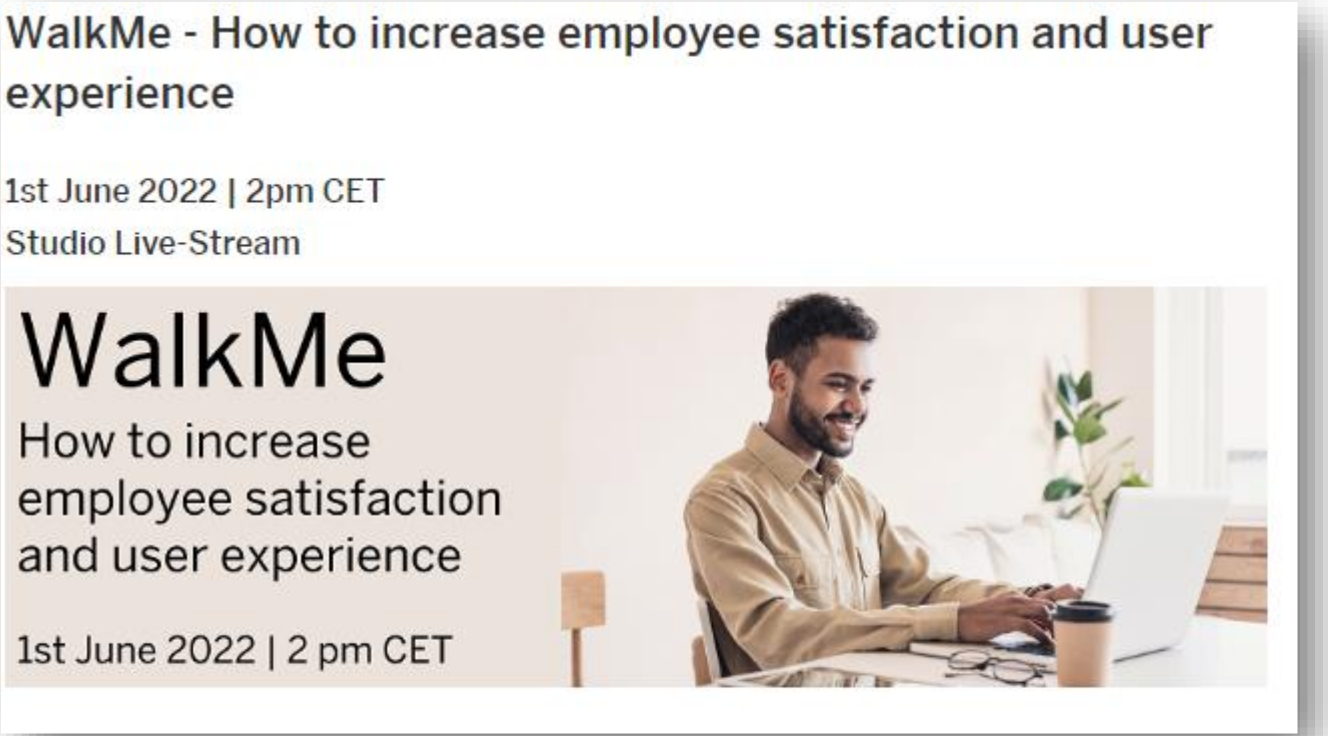
How did you rollout the "upgrade"?



Overall, how satisfied are you with the NextGen UI?



How walk-me can help to smoothen the change



WalkMe - How to increase employee satisfaction and user experience

Appendix

Some Customer voices …

”Let´s be frank, previous UI was not that user-friendly. We really like new UI”

”We haven´t noticed many differences, compared to old UI. Just layout has changed and some buttons are moved….it is very intuitive”

“Existing e-learning materials were updated within 1 business day; no need to spend too much time on the materials as there will be always questions coming and you would need to approach them individually”

“Testing Phase took us most of the time, as we have many countries and many key users. We also had dependencies on key user time”.

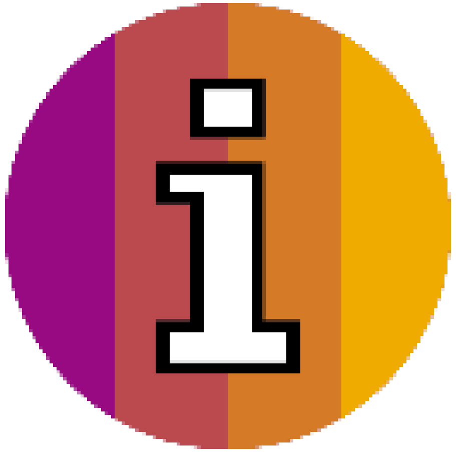
”It took me 1 working day to prepare the main materials, some other local users were working on local materials”

“… materials provided by Concur were really good”.

“We had regular calls to collect users feedback…so far no complaints. It´s just take time for the people to get used to the NextGen”

“We were having a short call with key users in every country. They were testing new UI and providing their feedback afterwards over the call. Once everything was resolved, then we were switching NextGen on to all users”

Change Management Content



Change Management Resources:

Strategy Template | Change Impact Assessment

Communication Best Practices

7 Steps to Planning for Change

7 Step Guide to Preparing for the New SAP Concur UI - SAP Concur Community

7 Steps to Migrating …

01 Identify Impact

- Familiarise yourself with the changes and who they will impact
- Meet up with decision makers
- Communicate the changes and answer any questions

Tip: If you have both Concur Expense and Concur Request you will have to upgrade to both at the same time because many feature and screens are shared.

02 Build Your Team

- Meet regularly with IT, training teams, communication leaders, helpdesk, auditors and executives
- Agree an approach that aligns with company culture
- Plan your rollout according to geography, challenges and roles

Tip: Identify what else is happening in your organisation which might impact the changeover and consider coordinating change events.

03 Test Test Test

- Set clear timelines and flag up important milestones
- Consider running pilots or test groups with key audiences
- Establish any potential obstacles to equip you with answers to common issues

Tip: There will be no impact to data or transactions; only the UI used to access that data has changed.

[7 Steps to Migrating to the SAP Concur NextGen UI]

04 Deliver Training

- Plan for pre-, during and post-deployment training, whether that's instructor-led or self-paced
- Mine your pilot groups for potential pain points
- Think about your audience needs and preferences when deciding formats (PDFS, forums etc.)

Tip: The new UI only applies to the solutions on the web (not mobile), irrespective of edition (Professional or Standard).

05 Talk to Everyone

- Communicate change positively and realistically
- Ensure you are specific to each audience group's needs across email, portals, newsletters, website and webinars etc.
- Users will have questions – open the gateways and wallow feedback

Tip: The first time the user visits the home page in the updated UI, the user will see a three-slide product tour

06 Measure Success

- Identify targets and metrics – what does success look like?
- Use surveys to gauge progress and success
- Measure adoption rates, time savings, help requests and user satisfaction

Tip: The first phase of the UI change is focused on users – additional phases to include approver and processor screens are planned.

07 Offer Help

- Make helpdesk, on-site IT and training teams available to users
- Prepare these teams with additional training
- Give users a choice of support options depending on their needs

Tip: The User Assistance Tool helps drive user adoption by supporting the onboarding process as well as increasing productivity for users.

A sample countdown calendar to change.

Every change takes time, so take a few minutes to examine this sample change management schedule to see how your peers manage change.

T- 5 Months	**Impact Assessment/Analysis** ☐ Define exactly what is changing ☐ Identify the reason(s) for the change ☐ Describe the impact it will have on the company ☐ Determine the size and scope of the change (including forms, home pages, etc.)	
T- 4 Months	**Action Planning** ☐ Plan rollout waves Complete prep work: ☐ System updates ☐ Training materials (point out what's changed, keep it simple) ☐ Communications plan ☐ Special communications to exec leadership	**First Pilot** ☐ Target influencers, exec assistants ☐ Gather feedback, suggestions, and input ☐ Adapt training and communications based on feedback
T- 3 Months	**Messaging/Communications** ☐ Finalize communications ☐ Use simple messaging outlining impact and benefits; be clear, concise and positive ☐ Deliver awareness communications ahead of time (three months); and provide one additional update each month prior to launch ☐ Use multiple channels to deliver communications at each milestone (email, newsletters, portals, webinars, etc.)	**Pilot** ☐ Launch second pilot, if applicable (Ex: in Asia, AMAS, Europe) ☐ Collect learnings from pilot groups to inform subsequent waves ☐ Ensure support groups are adequately staffed and prepared with specific information about what to expect, and key topics
T- 1 Month	**Pre-Deployment** ☐ Deliver pre-launch communications ☐ Deliver training webinars	
Launch	**Deployment Waves** ☐ Typical waves are defined by country, region or by groups (frequent users, sales, etc.) ☐ Monitor feedback, update content and communications accordingly as you go	**Post-Deployment** ☐ Gather feedback and measure user satisfaction via surveys

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Thank You!

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