



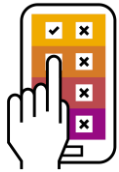
SAP Concur 

# NextGen UI: Key Features and Tips for a smooth migration

INTERNAL

# 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



SAP Concur

THE BEST RUN SAP

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 Reque

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 i segments and expected expenses.
- **Accessibility:** provides a more approach visual, auditory, motor, cognitive, or spee more inclusive.

## Opt-in Period Begins for Updated User Interface

We are pleased to announce that our Concur Request user interface (UI) hz 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

## Moving to the Updated U Concur Expense and Con Request

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

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

THE BEST RUN SAP

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

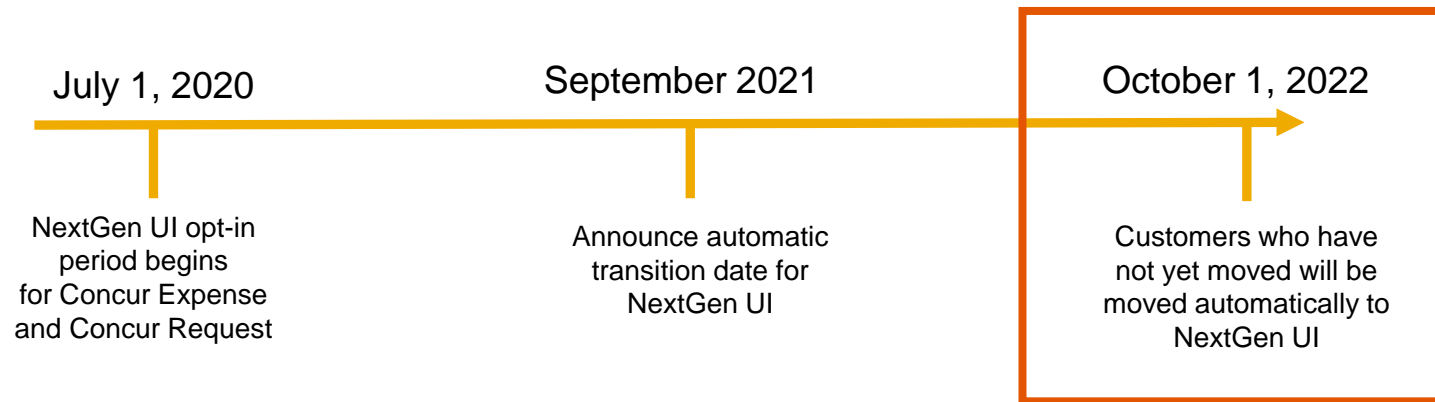
# NextGen UI for Concur Expense and Concur Request



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



## Next Steps



# 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

The screenshot shows the 'Group Configurations' interface in SAP. It has tabs for 'Expense', 'Employee', and 'UI Preview'. The 'Employee' tab is selected. Below the tabs is a 'Save' button and a text prompt: 'Select Employee Groups to preview the enhanced user experience.' Below this is a table with columns 'Preview Active', 'Group', and 'Path'. The table lists various employee groups, some with checkboxes in the 'Preview Active' column.

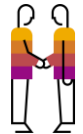
Preview Active	Group	Path
<input type="checkbox"/>	*Global	*Global
<input type="checkbox"/>	Gruppe 1	*Global-Gruppe 1
<input type="checkbox"/>	SAP ICS	*Global-SAP IC...
<input type="checkbox"/>	Public Sector	*Global-Public S...
<input type="checkbox"/>	Professional Ser...	*Global-Professi...
<input type="checkbox"/>	Pharma	*Global-Pharma
<input type="checkbox"/>	Manufacturing	*Global-Manufa...
<input type="checkbox"/>	Legal	*Global-Legal
<input type="checkbox"/>	Healthcare	*Global-Healthc...
<input type="checkbox"/>	Financial Services	*Global-Financi...
<input type="checkbox"/>	BE Advertising	*Global-BE Adv...
<input checked="" type="checkbox"/>	CH Advertising	*Global-CH Adv...
<input checked="" type="checkbox"/>	DE Advertising	*Global-DE Adv...
<input type="checkbox"/>	DE BD	*Global-DE BD
<input type="checkbox"/>	DE Distribution	*Global-DE Distr...
<input type="checkbox"/>	DE Engineering	*Global-DE Engi...
<input type="checkbox"/>	DE Event	*Global-DE Event
<input type="checkbox"/>	DE Export Sales	*Global-DE Exp...
<input type="checkbox"/>	DE Facilities	*Global-DE Faci...
<input type="checkbox"/>	DE Facilities Field	*Global-DE Faci...
<input type="checkbox"/>	DE Finance	*Global-DE Fina...
<input type="checkbox"/>	DE Implementat...	*Global-DE Impl...
<input type="checkbox"/>	DE Invoice Sales	*Global-DE Invo...
<input type="checkbox"/>	DE Presales	*Global-DE Pres...
<input type="checkbox"/>	DE Technical	*Global-DE Tec...
<input type="checkbox"/>	DK Advertising	*Global-DK Adv...
<input type="checkbox"/>	ES Advertising	*Global-ES Adv...
<input checked="" type="checkbox"/>	ES Solutions	*Global-ES Solu...
<input type="checkbox"/>	FI Advertising	*Global-FI Adver...
<input checked="" type="checkbox"/>	FR Advertising	*Global-FR Adv...
<input checked="" type="checkbox"/>	FR BD	*Global-FR BD
<input checked="" type="checkbox"/>	FR Distribution	*Global-FR Distr...



**Watch** videos and read documentation provided



**Plan** activation per wave – **ATTENTION** can be activated per user group or per User



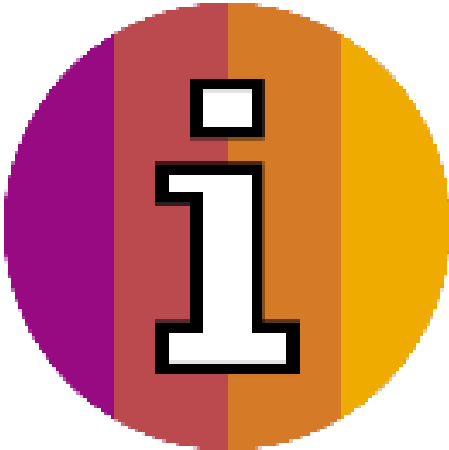
**Get in touch** with your CIP



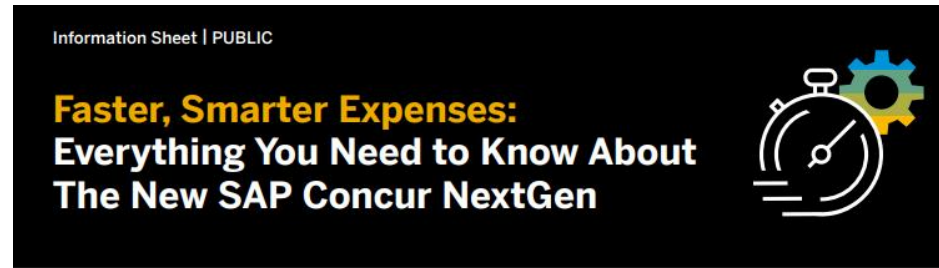
**Open a Case**



# Most important document



See resource center below



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.





SAP Concur 

# NextGenUI

## What to expect, what has changed?

INTERNAL

# 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](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](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](http://www.concurtraining.com/customers/tech_pubs/NextGenEXP/UpcomingEnhancements.pdf)

## Request

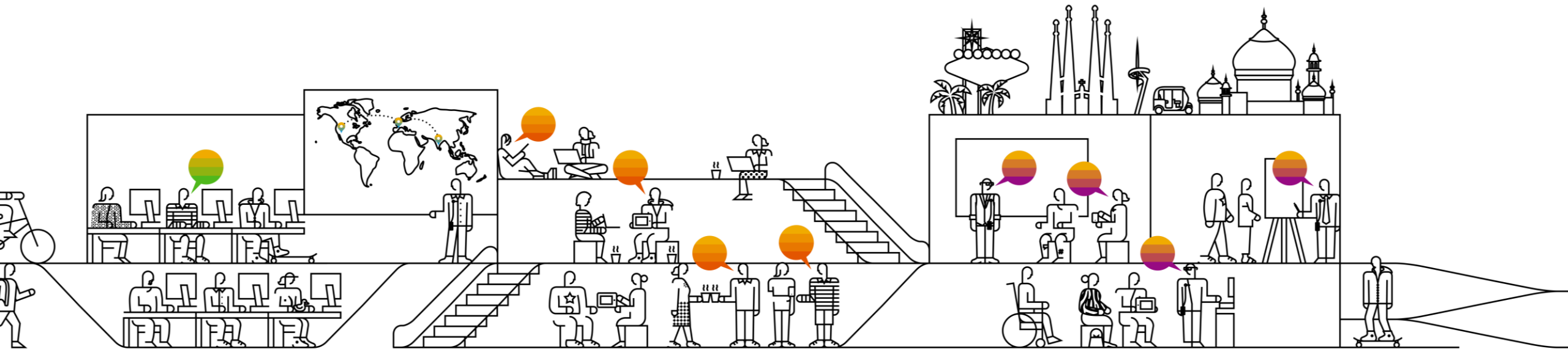
- n/a – not applicable

[https://www.concurtraining.com/customers/tech\\_pubs/NextGenREQ/UpcomingEnhancementsRequest.pdf](https://www.concurtraining.com/customers/tech_pubs/NextGenREQ/UpcomingEnhancementsRequest.pdf)



# Before & After UI Examples

Concur Expense



# NextGen Expense In-product Messaging

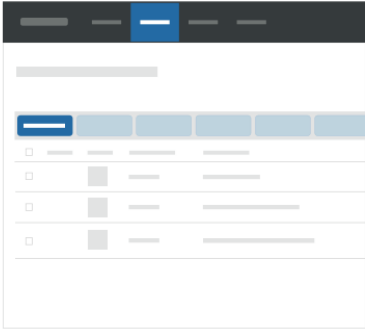
## NextGen Expense – Home Page (3 slide product tour):

### 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.

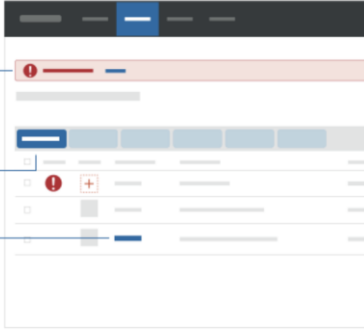
Take a quick tour to learn more.



### In an expense report

Now, within a report, you can:

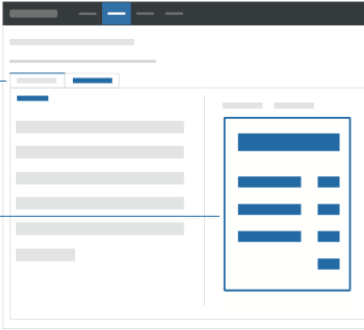
- 1 Click an alert to go directly to where you can fix the issue.
- 2 Add or create an expense from a single location.
- 3 See which expenses have associated corporate card charges ready.



### 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.



# Expense Landing Page

**Manage Expenses**

REPORT LIBRARY View: Active Reports ▼

**NOT SUBMITTED** 03/09/2018  
Seattle Sales Meetings  
\$0.00

**SUBMITTED** 03/09/2018  
February Account Management  
\$747.76  
Submitted & Pending Approval

**AVAILABLE EXPENSES** View: All Expenses ▼

Delete Combine Expenses Move to ▼

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date ▼	Amount
<input type="checkbox"/>		Pending Card Transaction	Hotel	Choice	04/11/2018	\$0.00 <i>Estimated</i>
<input type="checkbox"/>		Visa	Taxi	Uber Technologies	03/09/2018	\$56.00
<input type="checkbox"/>		Visa	Hotel	Hyatt Hotels	03/09/2018	\$614.13
<input type="checkbox"/>		Visa	Breakfast	Daily Grill	03/09/2018	\$24.00

**AVAILABLE RECEIPTS**

**Upload Receipt Image**  
5MB limit per file

Etta's Dinner.jpg

Hyatt Seattle.png

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

# Clean Design Focused on Guiding Users to the Next Step

## Before

The 'Before' interface is cluttered with many elements. At the top, there's a navigation bar with 'SAP Concur' and tabs for 'Requests', 'Travel', 'Expense', 'Invoice', and 'App Center'. Below this, a 'Manage Expenses' section shows 'New York Trip' with buttons for '+ New Expense', '+ Quick Expenses', 'Import Expenses', 'Details', 'Receipts', and 'Print / Email'. A large 'Exceptions' table is prominent, listing items like 'Business Meal...', 'Hotel', and 'Parking/Transit...' with dates, amounts, and exception messages. Below the exceptions, there's a table of 'Expenses' with columns for Date, Expense Type, Amount, and Requested. The bottom right features a detailed form for adding an expense, including fields for Expense Type, Transaction Date, Business Purpose, Vendor Name, City, Payment Type, Amount, and PSA Project ID. At the very bottom, there are buttons for 'Save', 'Itemize', 'Attach Receipt', and 'Cancel'.

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

The 'After' interface is much cleaner and more focused. The top navigation bar is identical. The 'Manage Expenses' section shows 'New York Trip' with a total amount of '\$557.25' and a 'Not Submitted' status. A prominent 'Submit Report' button is visible. Below this, there's a 'Report Details' section with a table of expenses. The table has columns for Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The expenses listed are 'Hotel', 'Taxi', 'Individual Lunch', and 'Breach Lounge'. A 'More Actions' dropdown menu is also present. The overall design is more modern with clear lines and a focus on the next steps.

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

## Before

The 'Before' interface shows a list of expenses on the left and a detailed view on the right. A blue arrow points from the 'Receipt Image' button in the top right of the expense list to a separate window showing the receipt details.

**Expenses Table:**

Date	Expense Type	Amount	Requested
07/07/2018	Business Meals - Meetings The Bistro, New York, New York	\$164.08	\$164.08
07/07/2018	Individual Lunch Cafe Anavenetro Cantina, New York	\$16.24	\$16.24
07/06/2018	Individual Lunch Breach Lounge, New York, New York	\$12.13	\$12.13
07/06/2018	Taxi-Shuttle-Train Speedy Cab, New York, New York	\$18.79	\$18.79
07/06/2018	Individual Dinner Grass And Thistle, Seattle, Washington	\$17.47	\$17.47

**Expense Details (Right Panel):**

- Expense Type: Business Meals - Meetings
- Transaction Date: 07/07/2018
- Business Purpose: Sales Demo
- Enter Vendor Name: The Bistro
- City: New York, New York
- Payment Type: Cash
- Amount: 164.08 USD
- PSA Project ID: [Empty]
- Comment: [Empty]

**Attendees (Bottom Left):**

- Carler, Sar...
- Li, Wei
- Adams, Doug
- Davis, Eliza...
- Yoon, Justin
- Smith, Jam...
- Jones, Cas...
- Hinge, Kris...

**Receipt Image (Bottom Right):**

Breach Lounge  
1175 E 24th St  
New York, NY 10101

Employee: 07/06/2018 12:28 pm

Coffee 1.35  
BTL Lunch Special 9.00

Subtotal 10.35  
Tax 1.78  
Total 12.13

AMEX 14321 Payment 12.13

Tip  
Total

\*\* Customer Copy \*\*

Click to swap  
between detail and  
receipt views

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

The 'After' interface shows a single view where expense details and the receipt image are displayed side-by-side. A blue arrow points from the text 'Details and receipt in one view!' to the combined view.

**Expense Details (Left Panel):**

- Expense Type: Individual Lunch
- Transaction Date: 07/06/2018
- Business Purpose: [Empty]
- Enter Vendor Name: Breach Lounge
- City: New York, New York
- Payment Type: AMEX 14321
- Transaction Amount: 12.13
- Currency: US, Dollar
- PSA Project ID: [Empty]
- Comment: [Empty]

**Receipt Image (Right Panel):**

Breach Lounge  
1175 E 24th St  
New York, NY 10101

Employee: 07/06/2018 12:28 pm

Coffee 1.35  
BTL Lunch Special 9.00

Subtotal 10.35  
Tax 1.78  
Total 12.13

AMEX 14321 Payment 12.13

Tip  
Total

\*\* Customer Copy \*\*

Details and receipt  
in one view!

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



# Adding Meal Attendees

## Before

**Manage Expenses**

**Search Attendees**

Search Attendees Favorites Recently Used Attendee Groups

Choose an Attendee Type

Employee

Last Name First Name Attendee Title

Smith

**Search Results**

Email Address	Attendee Name
amber.smith@c...	Smith, Amber
KATHERINE S...	Smith, Amy Katherine K.
andy.smith@co...	Smith, Andrew

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

**Manage Expenses**

**New Expense**

Details Itemizations

Attendees (0)

Expense Type \* Business Meals - Meetings

**Add Attendees**

Recent Attendees New Attendee Attendee Groups

Business Guest Smil

More Search Options Smith, Jane

Can't find an attendee? Create New Attendee

Close Search

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

# Hotel Itemizations

## Before

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

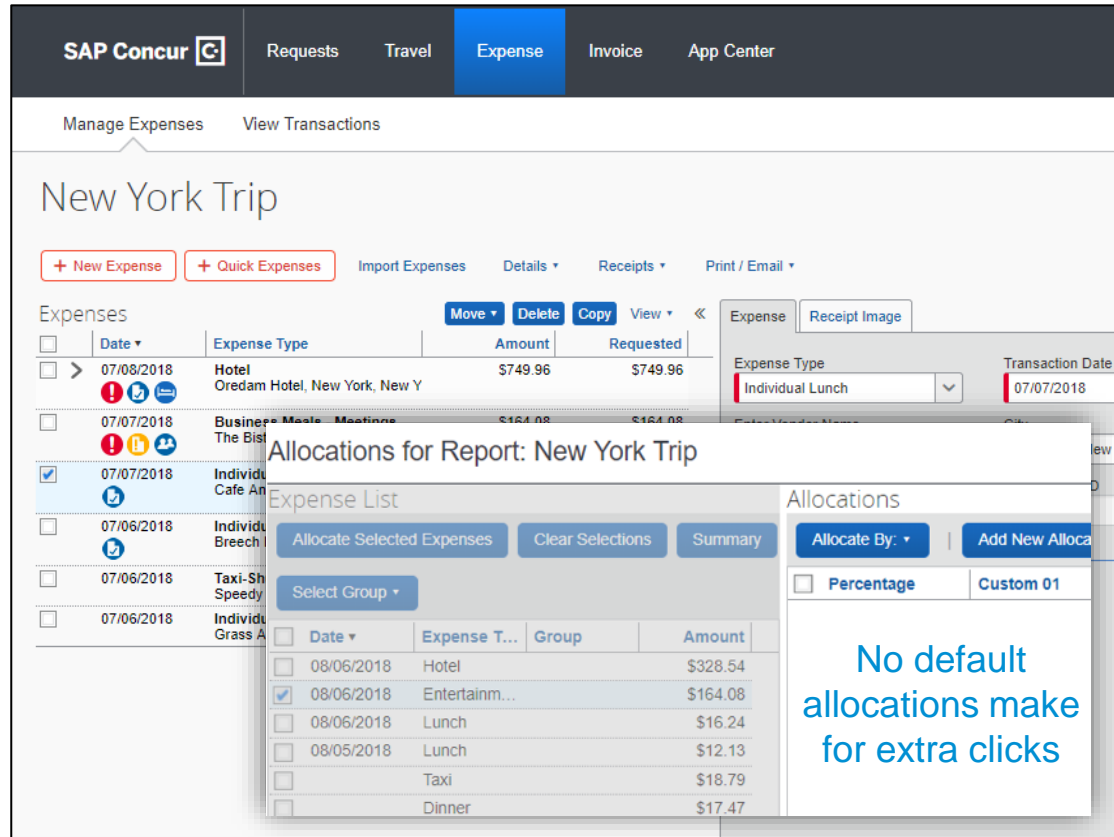
## After

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

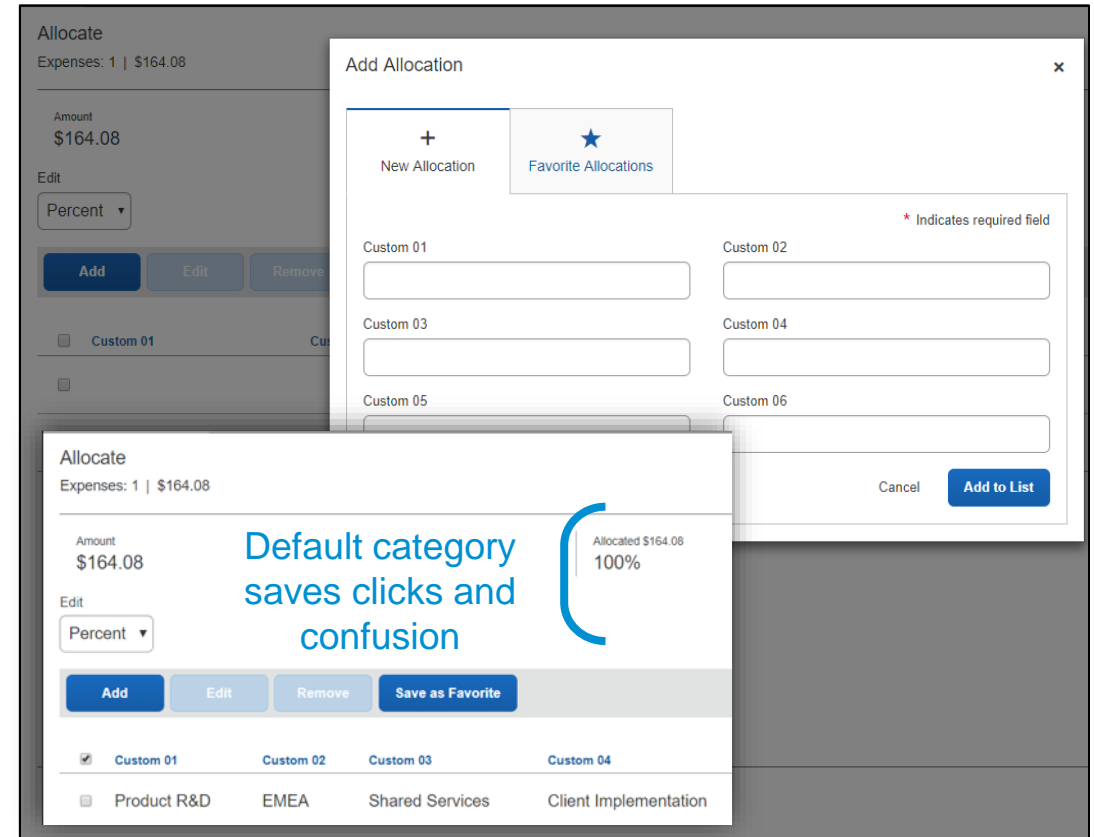
# Allocations

## Before



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

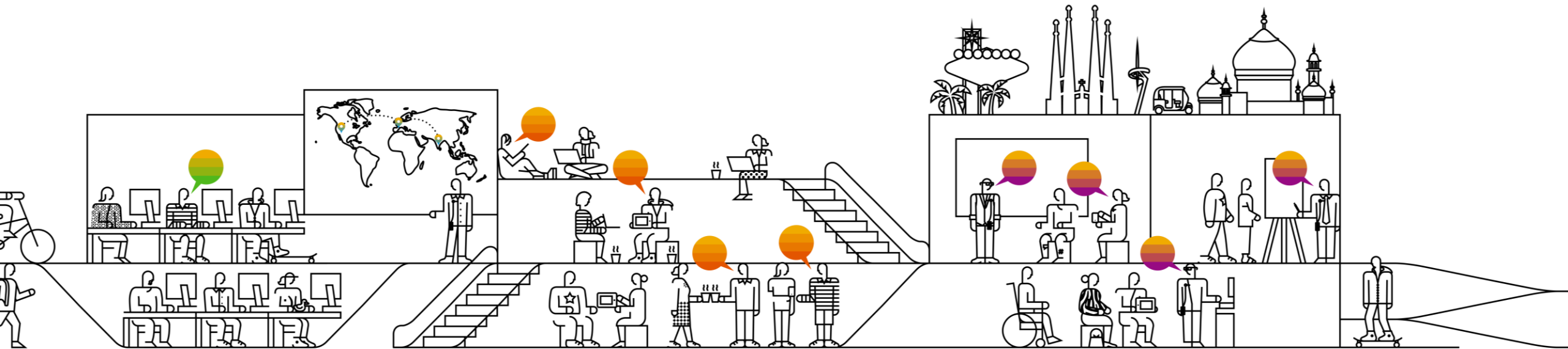
## After



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



# Clean Design Focused on Guiding Users to the Next Step

## Before

	Request Type	Request Name	Request ID	Status	Request Dates	Date Submitted	Total
<input type="checkbox"/>	Travel	Trip to Paris Work with Team Leon	39PG	Not Submitted	12/24/2018		\$3,350.00
<input type="checkbox"/>	Authorization	Office Supplies Standard office materials.	39PF	Submitted & Pending Approval - Davis, Pat R.	12/28/2018	05/15/2018	\$0.00
<input type="checkbox"/>	Travel	Client Sales Meeting Client Sales Meeting	39PA	Not Submitted	05/22/2018		\$0.00
<input type="checkbox"/>	Authorization	Trip to New York Sales meeting	39P7	Not Submitted	03/28/2018		\$1,900.00
<input type="checkbox"/>	Authorization	Trip to New York Sales meeting	39NX	Not Submitted	03/29/2018		\$3,800.00
<input type="checkbox"/>	Travel	Client Meeting Sales Meeting	39NM	Not Submitted	03/01/2018		\$377.00
<input type="checkbox"/>	Travel	New August Request Testing usage.	39NK	Not Submitted	02/01/2018		\$605.00
<input type="checkbox"/>	Travel	Test car Test for CLQ CLQ-55823	34PJ	Submitted & Pending Approval - Kuykendall, Deb	02/04/2018	08/16/2017	\$50.00
<input type="checkbox"/>	Travel	December Sales Meeting Sales meeting	34PF	Submitted & Pending Approval - Davis, Pat R.	08/18/2017	12/06/2016	\$700.00

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

Request Name	Status	Date	Amount
Trip to Paris	NOT SUBMITTED	12/12/2018	\$3,350.00
Office Supplies	SUBMITTED	05/15/2018	\$0.00
Client Sales Meeting	NOT SUBMITTED	03/09/2018	\$0.00
Trip to New York	NOT SUBMITTED	03/01/2018	\$1,900.00
Trip to New York	NOT SUBMITTED	02/06/2018	\$3,800.00
Client Meeting	NOT SUBMITTED	08/15/2017	\$377.00
New August Request	NOT SUBMITTED	08/08/2017	\$605.00
Trip to New York	SUBMITTED	02/03/2017	
Trip to New York	SUBMITTED	12/06/2016	
Client Meeting	NOT SUBMITTED	10/20/2016	
New August Request	NOT SUBMITTED	08/22/2016	

New experience has individual tiles:

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



# Create New Request

## Before

The screenshot shows the SAP Concur 'Create New Request' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', 'Links', 'Profile', and 'Help'. Below this, a secondary bar contains 'Manage Requests', 'Create New', 'Process Requests', 'Quick Search', 'Budget Insight', and 'All Purchase Orders'. The main content area is titled 'Request' and includes buttons for 'Cancel', 'Save', 'Print / Email', 'Delete Request', and 'Submit Request'. The 'Status' is 'Not Submitted'. The 'Request Name' field is highlighted with a red border. The 'Purpose' field is also highlighted with a red border. The 'Request Policy' field is highlighted with a red border. The 'Start Date' field is highlighted with a red border. The 'End Date' field is highlighted with a red border. The 'Cash Advance' section includes 'Cash Advance Amount' and 'Cash Advance Comment' fields.

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

## After

The screenshot shows the redesigned 'Create New Request' page. The layout is simplified with larger input fields and a clear 'Create' button. The 'Request Name' field is highlighted with a red border. The 'Purpose' field is also highlighted with a red border. The 'Request Policy' field is highlighted with a red border. The 'Start Date' field is highlighted with a red border. The 'End Date' field is highlighted with a red border. The 'Comment' field is highlighted with a red border. The 'Cash Advance' section is simplified with a single 'Cash Advance Amount' field and a 'Cash Advance Comment' field.

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

# Expected Expenses & Segments

## Before

**SAP Concur** | Requests | Travel | Expense | Invoice | Approvals | Reporting | App Center | Links | Profile | Help

Manage Requests | Create New | Process Requests | Quick Search | Budget Insight | All Purchase Orders

### Request 3C7Y

Request Name: Trip to Paris  
Purpose: Client site visit  
Status: Not Submitted

Attachments | Print / Email | Delete Request | Submit Request

Request Header | Segments | Expenses | Approval Flow | Audit Trail

+ New Expense | Delete

Date	Expen...	Amount	Requested
------	----------	--------	-----------

Expense Type:

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.

Airfare	Meals
Business Promotions	Breakfast
Misc. Promotional Expense	Dinner
Communications	Fixed Meals
Cellular Phone	Lunch
Local Phone	Other
Long Distance	Awards
Online Fees	Booking Fees
Entertainment	Gifts
Business Meals (Attendees)	Incidentals
Entertainment-Other	Laundry

TOTAL AMOUNT: \$0.00 | TOTAL REQUESTED: \$0.00

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

Manage Requests | Process Requests | All Purchase Orders

### Trip to Paris \$0.00

Not Submitted | Request ID: 3C7Y

More Actions | Submit Request

Request Details | Attachments

### EXPECTED EXPENSES

Add | Edit | Allocate | Delete

Search for an expense type

- Business Promotions
  - Misc. Promotional Expense
- Communications
  - Cellular Phone
  - Local Phone
  - Long Distance
  - Online Fees
- Entertainment
  - Business Meals (Attendees)
  - Entertainment-Other

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.

# Attendees

## Before

Request 3KLU

Request Name: Business Lunch  
Purpose: Meeting with prospective clients

Attachments Print / Email Delete Request Submit Request  
Status: Not Submitted  
Amount: \$200.00

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
11/20/2019	Business Meal...	\$200.00	\$200.00

Expense Type: Business Meals (Attendees) Transaction Date: 11/20/2019

Description: Prospective client lunch meeting Transaction Amount: 200.00 USD

Comment

Attendees Attendees: 5 | Attendee Total: \$200.00 | Remaining: \$0.00

Atten...	Attendee Title	Company	Attendee Type	State	Amount
<input type="checkbox"/>	Brow...		This Employee		\$40.00
<input type="checkbox"/>	Fishm...	Director of Mark...	Business Guest		\$40.00
<input type="checkbox"/>	Gross...	VP Sales	Business Guest		\$40.00
<input type="checkbox"/>	Wrigh...	COO	Business Guest		\$40.00
<input type="checkbox"/>	Miller...	CTO	Business Guest		\$40.00

TOTAL AMOUNT \$200.00 TOTAL REQUESTED \$200.00

Save Allocate Cancel

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

## After

New Expense: Business Meals (Attendees) \$200.00

Cancel Save

Attendees (0)

Transaction Date: 11/20/2019 Description: Prospective client lunch meeting

Transaction Amount: 200.00 Currency: US, Dollar Comment

Attendees Business Meals (Attendees) | 200

Attendees: 1

Add Remove

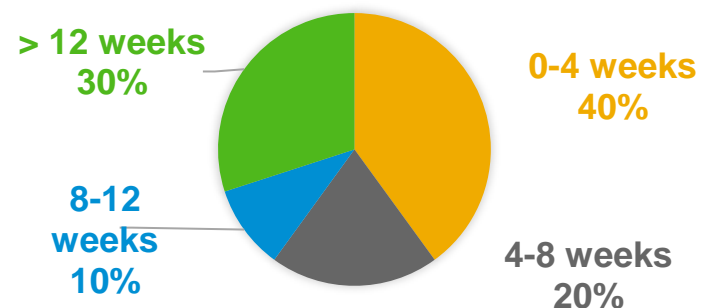
Attendee Name	Attendee Title	Company	Attendee Type	State	Amount
<input type="checkbox"/>	Brown, Terry T		This Employee		200

Cancel Save

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

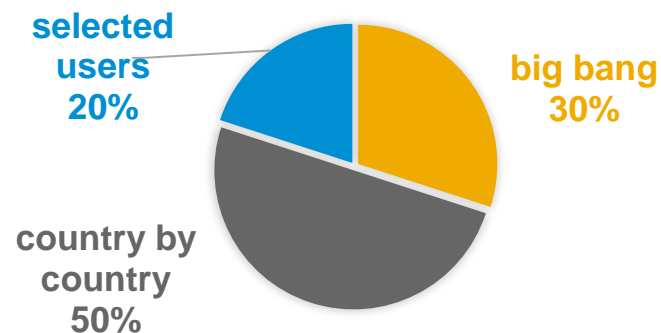
How long did it take you/or you plan it will take you to do the whole change within your organization:



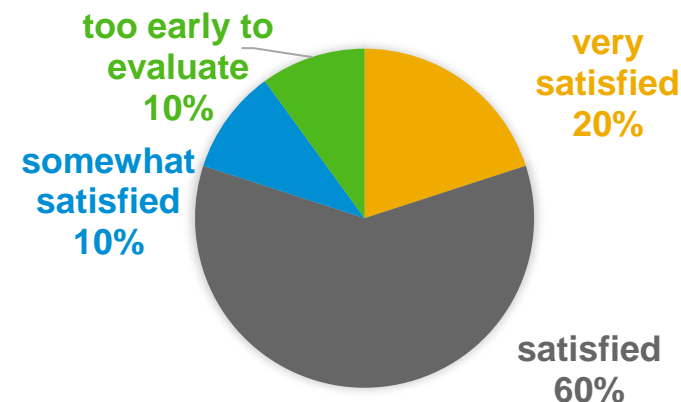
What have you prepared/provided to the end-users? (MULTIPLE CHOICE possible)

- 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

1st June 2022 | 2pm CET

Studio Live-Stream

WalkMe

How to increase  
employee satisfaction  
and user experience

1st June 2022 | 2 pm CET



[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".*

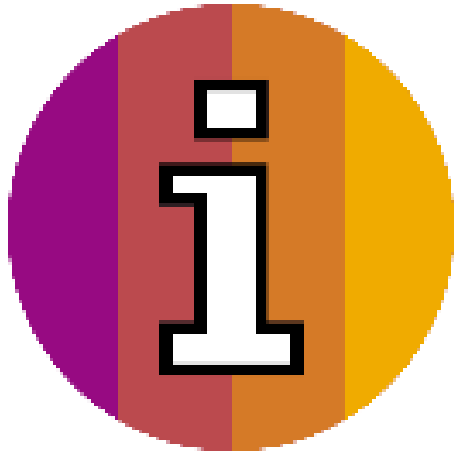
*"It took me 1 working day to prepare the main materials, some other local users were working on local materials"*

*"... 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.

## 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.

## 7 Steps to Migrating to the SAP Concur NextGen UI

## 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.



<b>T- 5 Months</b>	<b>Impact Assessment/Analysis</b>	
	<input type="checkbox"/> Define exactly what is changing <input type="checkbox"/> Identify the reason(s) for the change <input type="checkbox"/> Describe the impact it will have on the company <input type="checkbox"/> Determine the size and scope of the change (including forms, home pages, etc.)	
<b>T- 4 Months</b>	<b>Action Planning</b>	<b>First Pilot</b>
	<input type="checkbox"/> Plan rollout waves Complete prep work: <ul style="list-style-type: none"> <li><input type="checkbox"/> System updates</li> <li><input type="checkbox"/> Training materials (point out what's changed, keep it simple)</li> <li><input type="checkbox"/> Communications plan</li> <li><input type="checkbox"/> Special communications to exec leadership</li> </ul>	<input type="checkbox"/> Target influencers, exec assistants <input type="checkbox"/> Gather feedback, suggestions, and input <input type="checkbox"/> Adapt training and communications based on feedback
<b>T- 3 Months</b>	<b>Messaging/Communications</b>	<b>Pilot</b>
	<input type="checkbox"/> Finalize communications <input type="checkbox"/> Use simple messaging outlining impact and benefits; be clear, concise and positive <input type="checkbox"/> Deliver awareness communications ahead of time (three months); and provide one additional update each month prior to launch <input type="checkbox"/> Use multiple channels to deliver communications at each milestone (email, newsletters, portals, webinars, etc.)	<input type="checkbox"/> Launch second pilot, if applicable (Ex: in Asia, AMAS, Europe) <input type="checkbox"/> Collect learnings from pilot groups to inform subsequent waves <input type="checkbox"/> Ensure support groups are adequately staffed and prepared with specific information about what to expect, and key topics
<b>T- 1 Month</b>	<b>Pre-Deployment</b>	
	<input type="checkbox"/> Deliver pre-launch communications <input type="checkbox"/> Deliver training webinars	
<b>Launch</b>	<b>Deployment Waves</b>	<b>Post-Deployment</b>
	<input type="checkbox"/> Typical waves are defined by country, region or by groups (frequent users, sales, etc.) <input type="checkbox"/> Monitor feedback, update content and communications accordingly as you go	<input type="checkbox"/> Gather feedback and measure user satisfaction via surveys

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

# Thank You!

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