Procurement & Payment Services

Concur Next Generation (NextGen)

Expense User Interface

October 1, 2022

Why is Concur updating the user interface (UI)?

- When is it coming?
- What's Not Changing..
- What exactly is changing?

Manage Expenses Page

- Report Library Section
- Available Expenses Section
- Available Receipts Section

New Report and New Expenses – The Basics

- New Expense Report (NextGen UI)
- New Expense (NextGen UI)
- Create an Expense –Typical Process (NextGen UI)
- Expense-Level Alerts and Exceptions
- Attendees
- Hotel/Lodging Itemizations
- Allocations

Why is Concur 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 to get their expenses done and get back to business. The NextGen UI is optimized to give you more value from the Expense solution:

- Accessible design for everyone: they used an inclusive approach to the design and engineering of the NextGen UI.
- Improved employee experience: the updated UI is designed to be more intuitive and provide a guided experience for all users.
- Built for continuous innovation: they are committed to delivering new features and enhancements on the NextGen UI.

When is it coming?

The Next Generation Expense User Interface will launch October 1, 2022

What's Not Changing..

- **Is there any change in functionality?**
  No. There is no change in functionality, but the way in which a task is completed in the UI may change.

- **Are any administrator / approver / processor screens or processes changing?**
  No. Only the end user experience is changing.

- **How will the Concur Mobile app change?**
  The Concur mobile app **will not change** as a result of this UI change.

- **How does this impact my data or user transactions during this process?**
  There will be **no impact** to data or transactions; only the UI used to access that data will change.

- **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.**

What exactly is changing?

- While changes can be seen throughout the product, the primary updates are being made to allocations, itemizations, and attendees.

- Changes to the following specific pages and activities include:
  - Concur Expense Landing page
  - Expense Report page
  - Expense Entry page
  - Report Modals
  - Itemizations
  - Attendees
  - Allocations

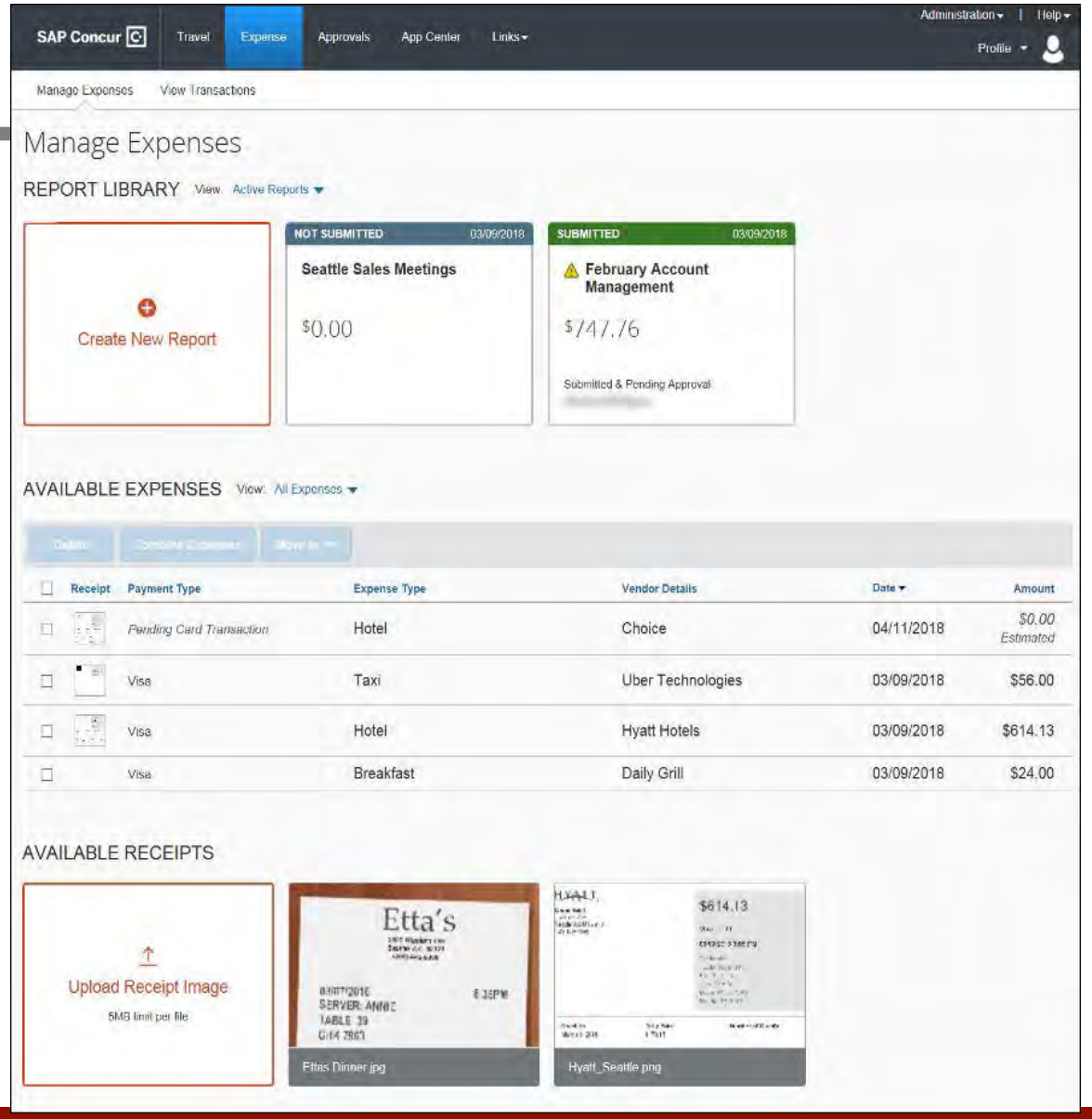
- Are any icons being removed or altered? If so, why? **Yes,** a number of icons have been removed and replaced with cleaner error messaging for a better user experience. By removing the icons, cleaner space was created that allowed for clearer text and direction to guide the user through exactly what needs to be done to complete their expense report.

Manage Expenses Page

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

It looks very much like the existing user interface. It has three sections – all of which are described on the following pages:

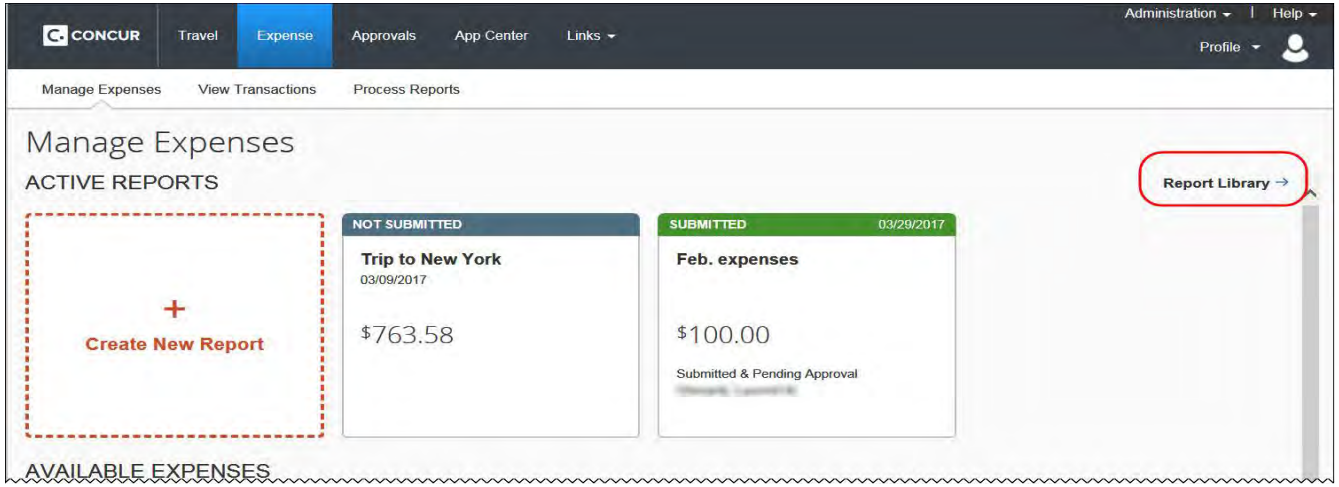
- Report Library
- Available Expenses
- Available Receipts



Report Library Section (Existing UI)

At the top of the **Manage Expenses** page is the **Report Library** section.

In the existing UI, your active reports are automatically visible. To see other reports, click **Report Library**.



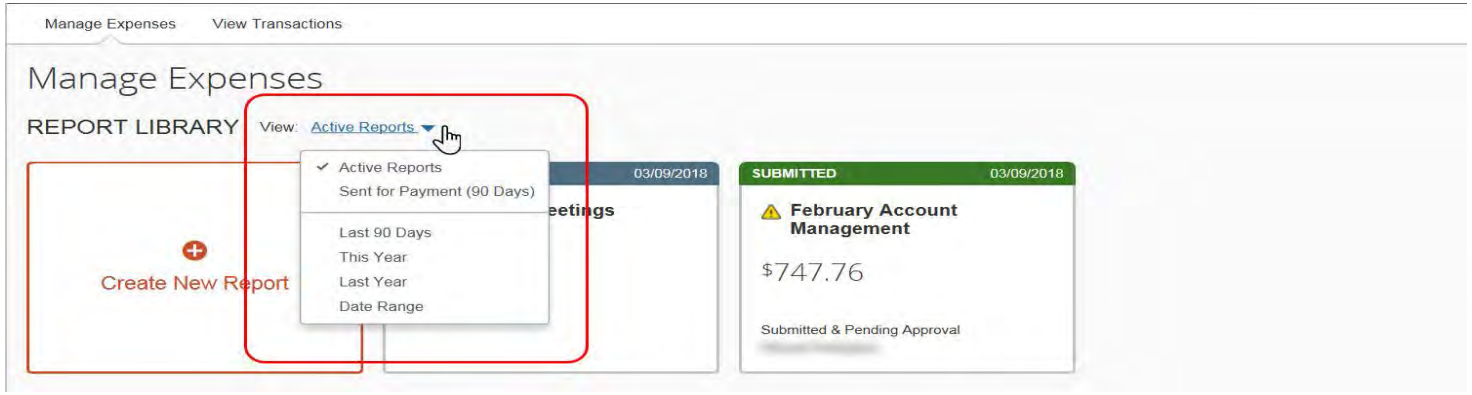
NOTE: In the existing UI, you can copy and delete selected reports from this page. In the NextGen UI for Concur Expense, those tasks are completed from within a report.

In the library, click **View** to access other reports.

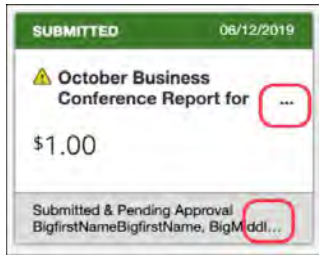
Report Library Section (NextGen UI)

In the NextGen UI for Concur Expense, your active reports and the library are combined so all reports are available on one page. The active reports appear by default, but you can easily view other reports.

From the **View** list, select one of the predefined options or define a custom date range.



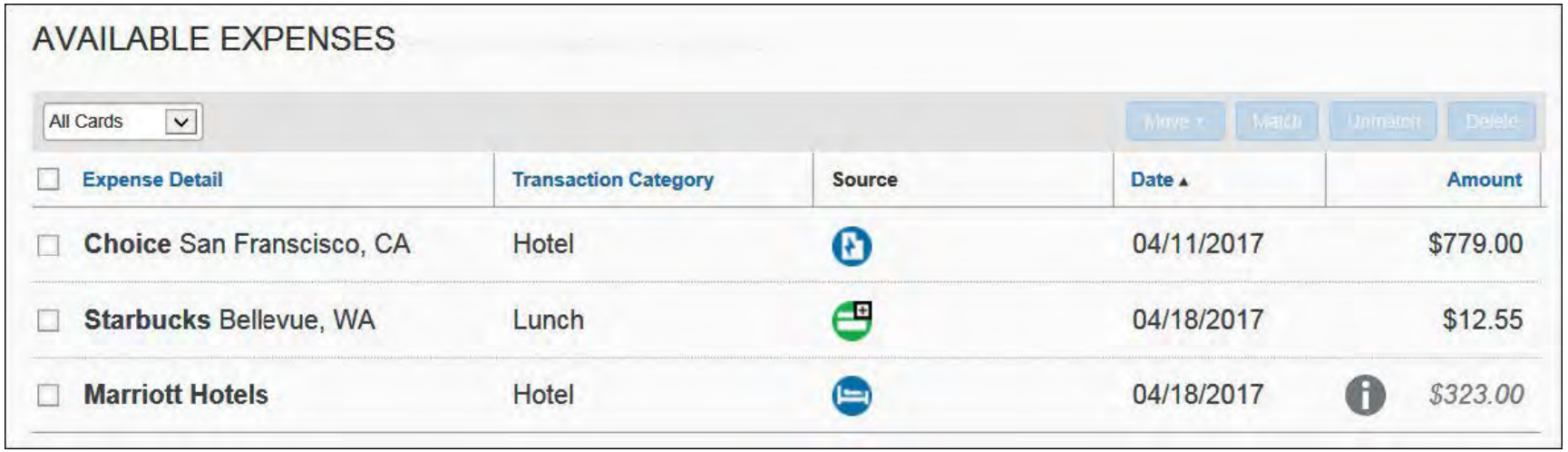
NOTE: If the report name or text is too long for the report tile, an ellipsis appears on the tile. When you click on the ellipsis, a tooltip appears with the full text.



Available Expenses Section (Existing UI)

The **Available Expenses** section is located in the middle of the **Manage Expenses** page.

In the existing UI, the **Available Expenses** section looks like this.



Available Expenses Section (NextGen UI)

In the NextGen UI for Concur Expense, there are a few changes to this table

AVAILABLE EXPENSES View: All Expenses

Delete | Combine Expenses | Move to

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
	Pending Card Transaction	Hotel	Choice	04/11/2018	*$0.00 Estimated*
	Visa	Taxi	Uber Technologies	03/09/2018	$56.00
	Visa	Hotel	Hyatt Hotels	03/09/2018	$614.13
	Visa	Breakfast	Daily Grill	03/09/2018	$24.00

- The **Receipt** column has been added to help you easily scan the list for items needing a receipt. You can sort (by clicking the column heading) to bring these to the top for action. The thumbnail image in the **Receipt** column indicates that the expense has an image attached.
- The **Source** column has been replaced with the **Payment Type** column to help you quickly scan for the expenses that have card information attached (so they are ready to be submitted) and which are still waiting for additional source information to arrive.
- In the **Amount** column, *Estimated* appears for hotel and car itinerary amounts. *Estimated* indicates that the actual amount is unknown, since the itinerary likely does not include other taxes, fees, etc. that will appear in the final card charge.

Available Receipts Section

The **Available Receipts** section is located at the bottom of the **Manage Expenses** page.

Existing UI

In the existing UI, the **Available Receipts** section looks like this.

NextGen UI

In the NextGen UI for Concur Expense, the look-and-feel is similar.

Click a receipt image to view it. You can zoom, rotate, and delete the image.

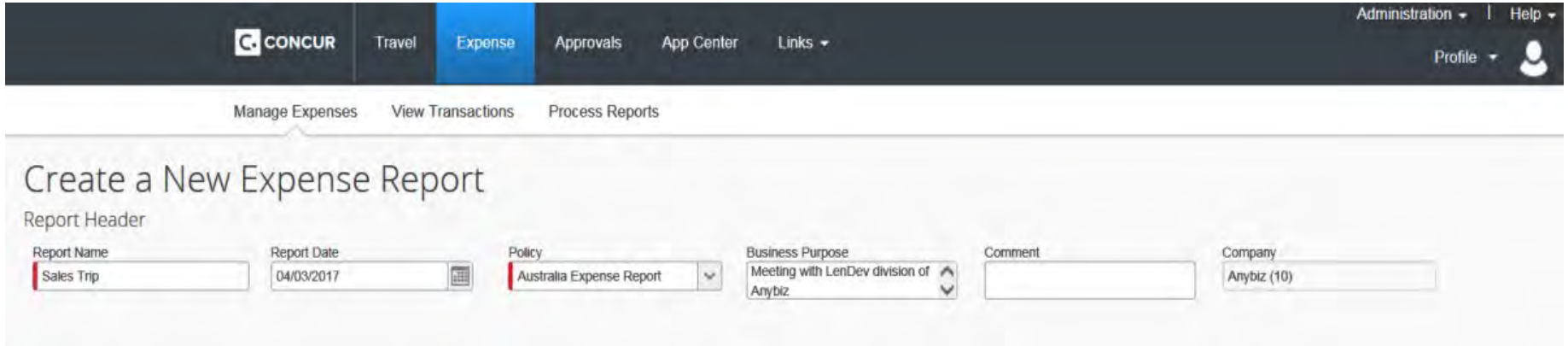
New Report and New Expenses – The Basics

Just as before, typically when you create a new expense report, you start with the report *header* and then move to the expense page to add the expenses and attach any required receipt images. **Though this basic process has not changed,** the pages are more streamlined and easier to manage. In virtually all cases, when working with expenses:

- The fields are larger and easier to navigate.
- Required fields are now marked with a red asterisk instead of a red band at the left edge of the field.

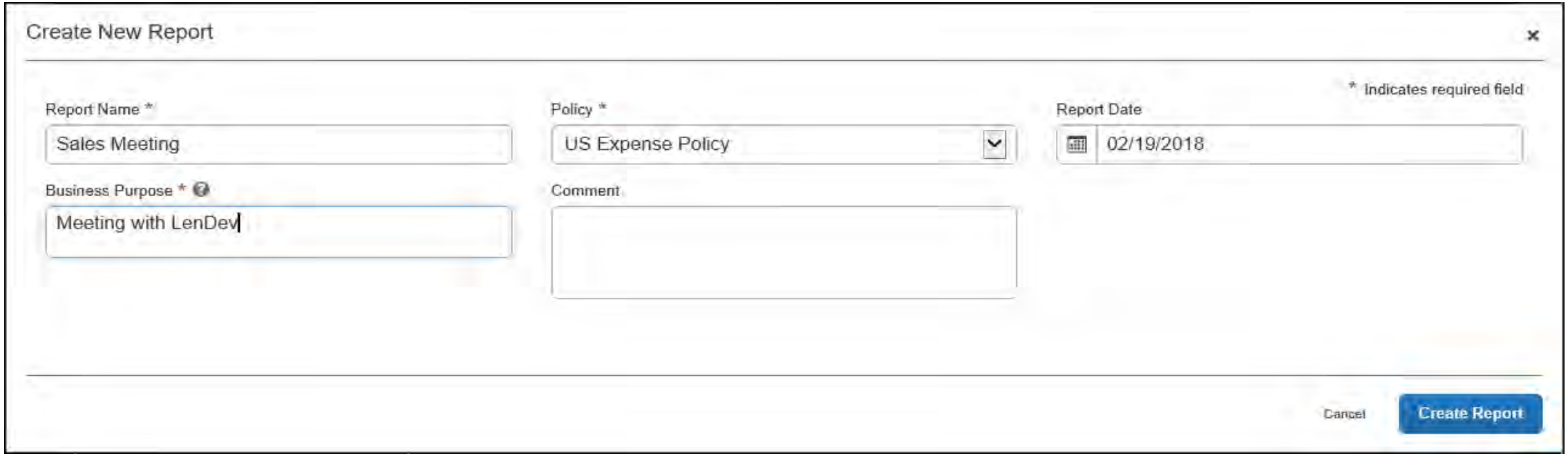
Existing UI

In the existing UI, the **Create a New Expense Report** page looks like this.



New Expense Report (NextGen UI)

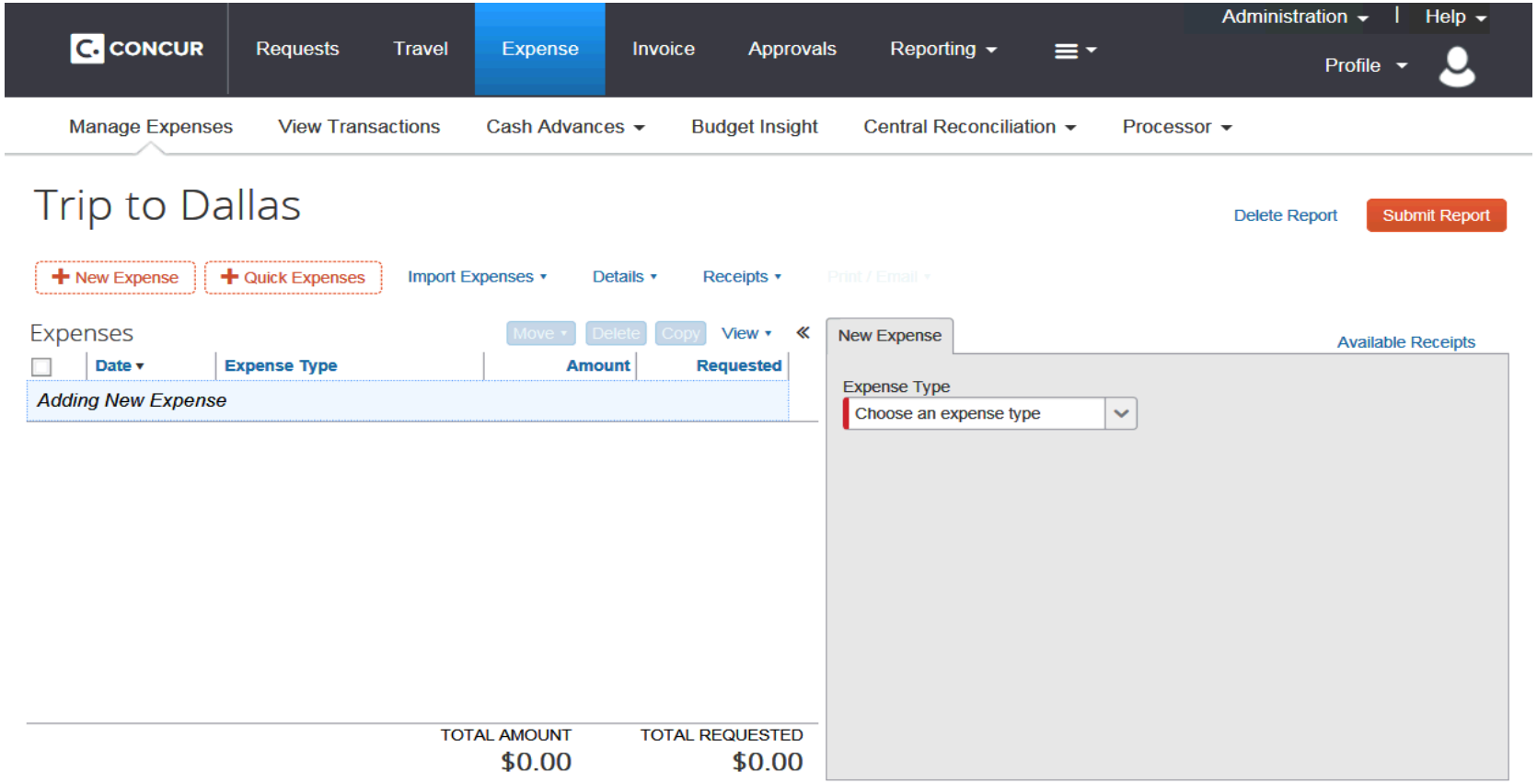
In the NextGen UI for Concur Expense, the header page is called **Create New Report**. The fields are larger and easier to navigate.



Required fields are now marked with a red asterisk instead of a red band at the left edge of the field.

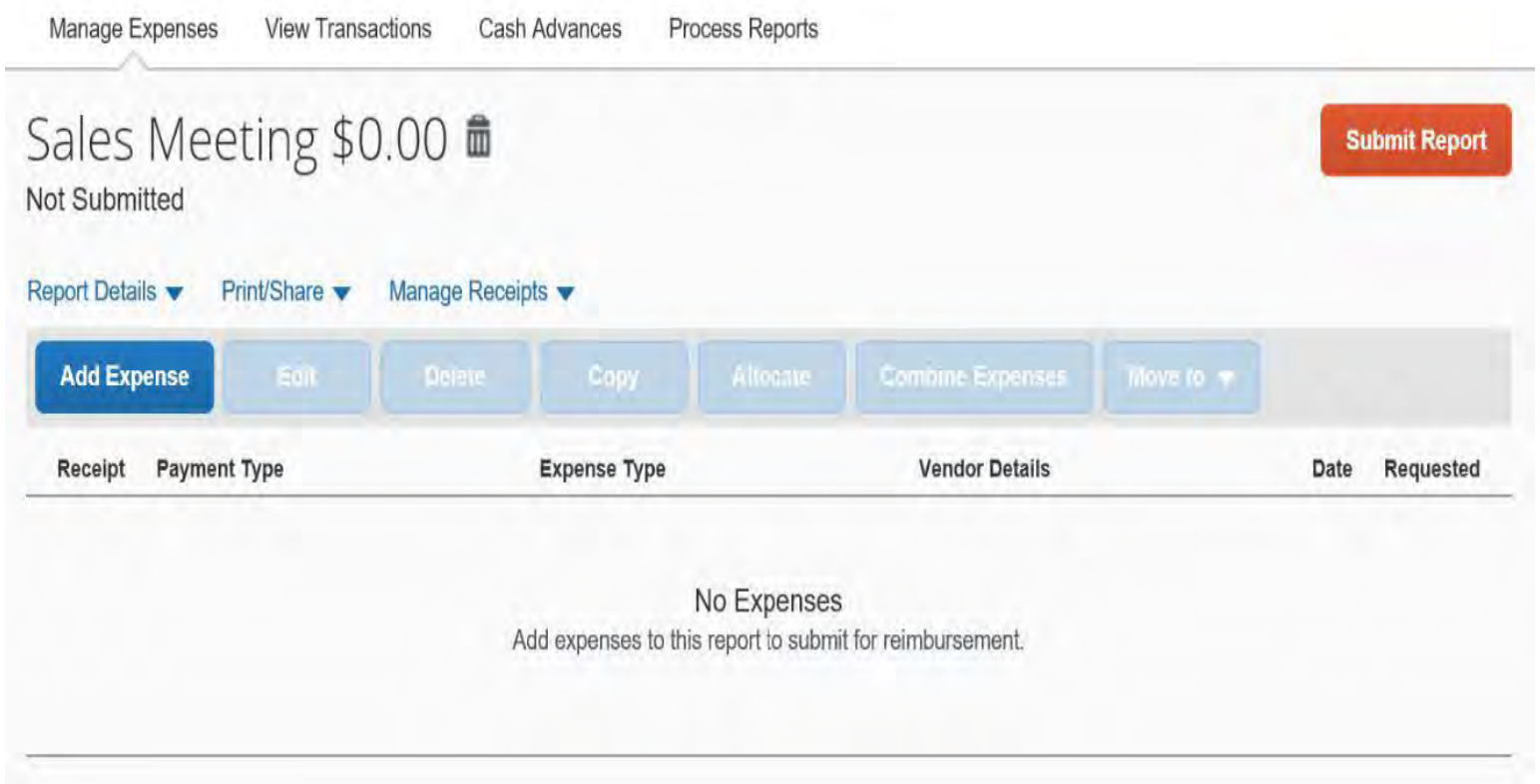
New Expense (Existing UI)

In the existing UI, after completing the report header page, the expense page appears.



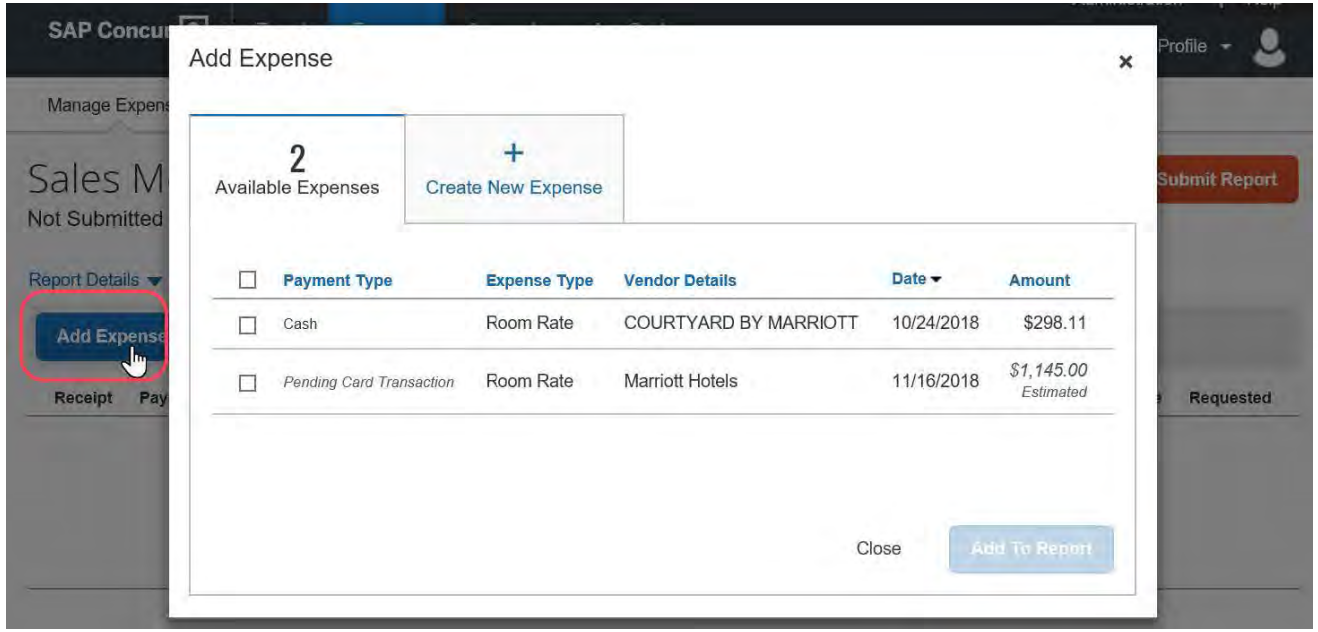
New Expense (NextGen UI)

In the NextGen UI for Concur Expense, the report page is cleaner and has fewer "sections" making the page easier to navigate.



Create an Expense –Typical Process (NextGen UI)

To get started, click **Add Expense**. The **Add Expense** window appears; all of the options for adding expenses to the report are available in this window. The default choice is to add items from your Available Expenses library, to encourage you to use those expenses first before creating a new expense – which helps reduce duplicate entries.



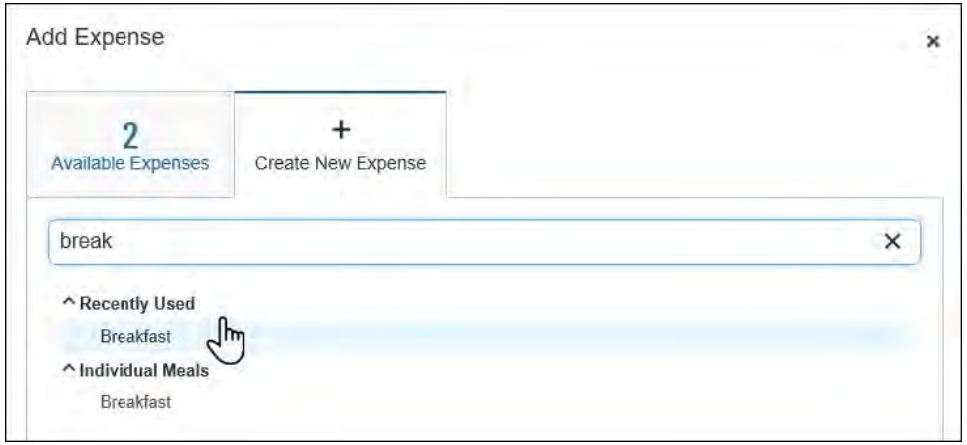
In the **Add Expense** window:

- To add Available Expenses, select the desired expenses and then click **Add To Report**.

Create an Expense –Typical Process (NextGen UI)

To create a new expense, click **Create New Expense**. This process is shown below.

In the following example, we will assume you clicked **Create New Expense**.

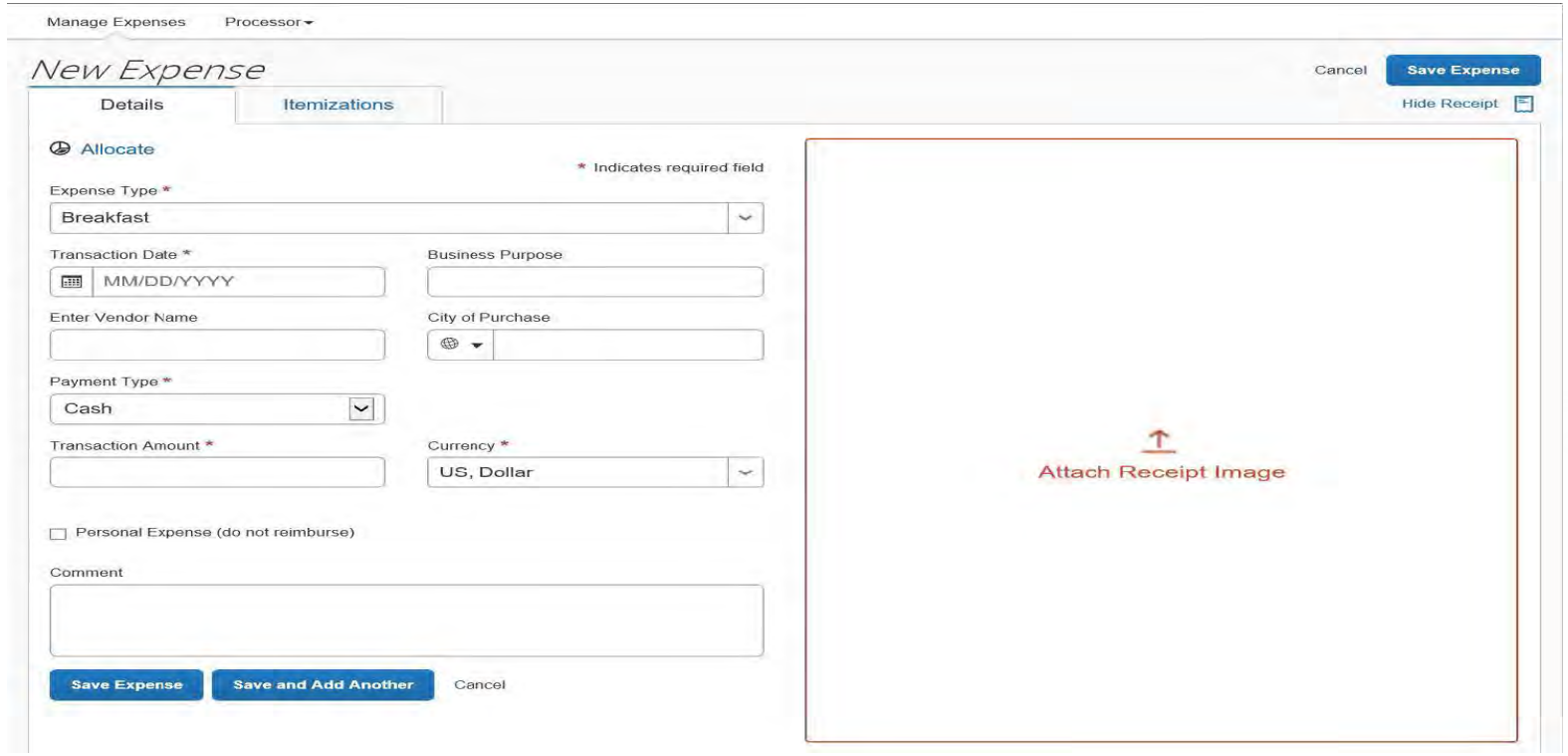


NOTE: In the search box at the top of the list, you can enter all or part of an expense type name. The list of available expense types shown will be filtered to show only those with matching text.

After you click **Create New Expense**, click the desired expense type.

Create an Expense –Typical Process (NextGen UI)

When you click the desired expense type, the **New Expense** page appears.

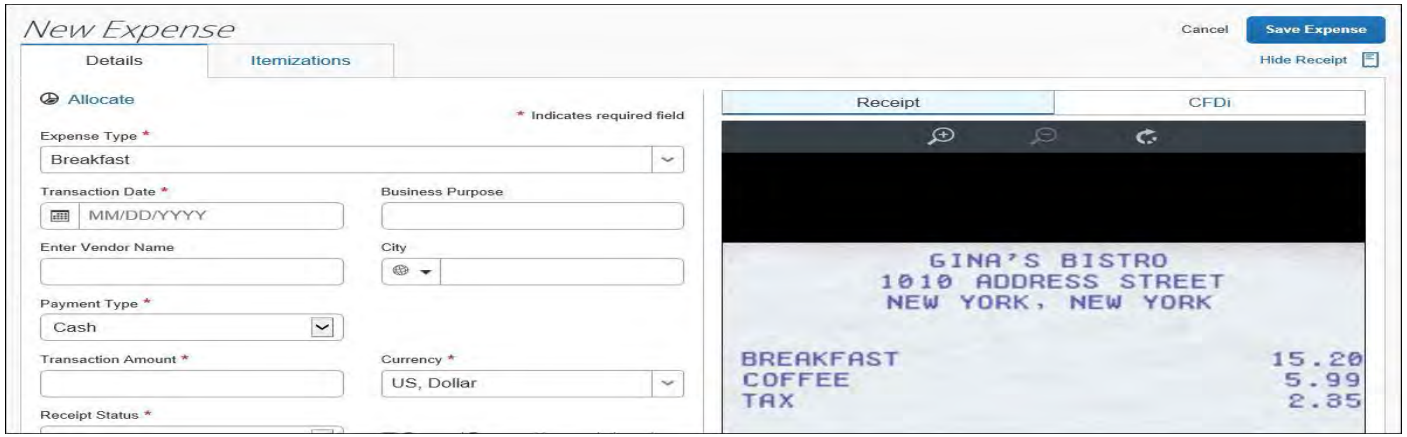


NOTE: If a receipt is not required for the specialized expense types handling mileage and daily allowances, then the receipt area is hidden by default. To display the receipt area so that a receipt may be added, click **Show Receipt**.

On the **Details** tab, the expense fields are on the left and the receipt image area is on the right. Click **Attach Receipt Image** to attach a receipt to the expense – by selecting from the receipt images in your Available Receipts library or by uploading a new image.

Create an Expense –Typical Process (NextGen UI)

You can attach the image first and then read the receipt image to easily complete the fields on the left. When done, click **Save Expense** (or **Save and Add Another** to quickly add another expense).



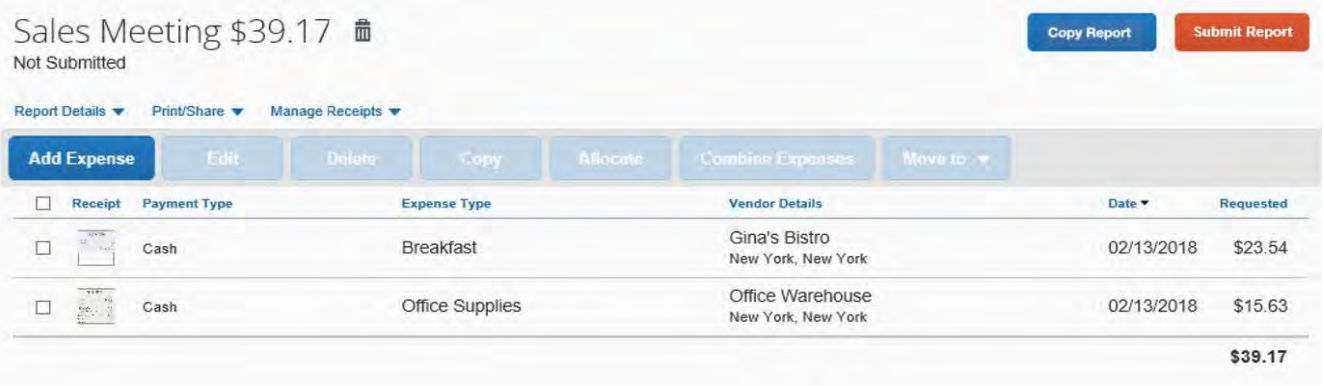
NOTE: On this sample report, receipt images were added manually while creating the expense entry; the image appears in the **Receipt** column.

If the expense does not yet have an image, then the icon appears in the **Receipt** column.

You can click the icon to add the receipt image – without having to open the expense entry.

If a receipt is not required, for example, for a mileage expense, then the icon does not appear.

Once expenses have been saved, the expense report looks like this:



Create an Expense –Typical Process (NextGen UI)

When you click **Submit Report**, the report totals appear. The top section summarizes the overall movement of funds projected for this expense report, providing a quick view of the expected (prior to submission) or actual payments.

In the existing UI, the report totals appear ***after*** you finished submitting the report.

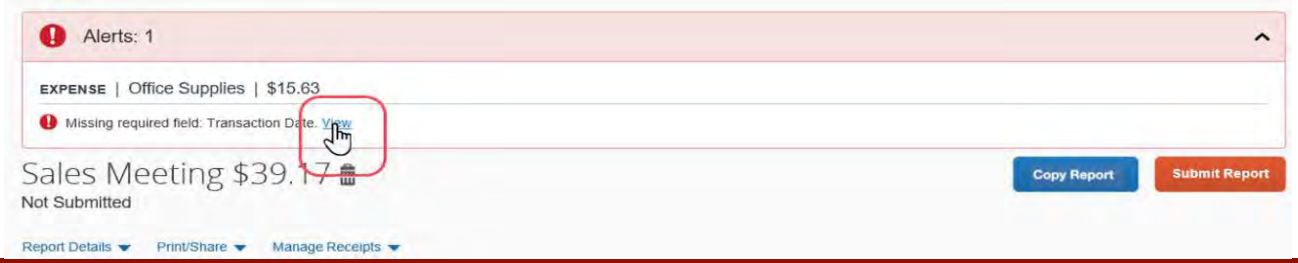
In the NextGen UI for Concur Expense, if adjustments are required, you can easily return to the report, make the changes, and then submit the report.

Expense-Level Alerts and Exceptions

If there are any issues when you save the expense (such as a missing required receipt image, a blank required field, or over-limit expense), an alert appears.

Click the down-pointing arrow (right side of the message); the area expands to show the alert details.

The alert message appears along with a **View** link. Click **View** to access the field with the issue.



Expense-Level Alerts and Exceptions

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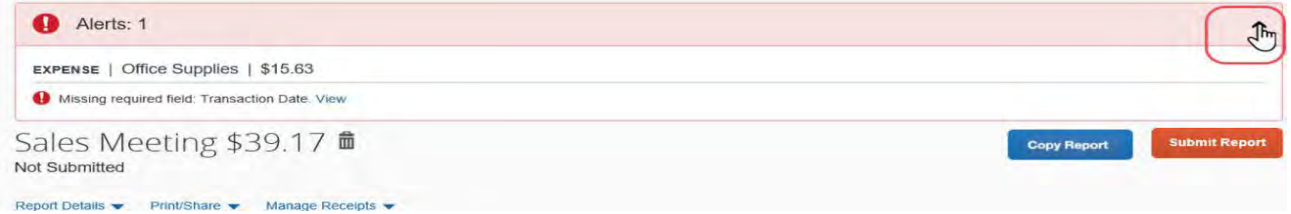
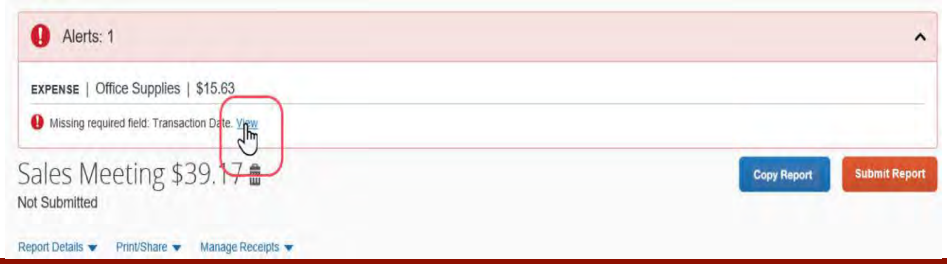
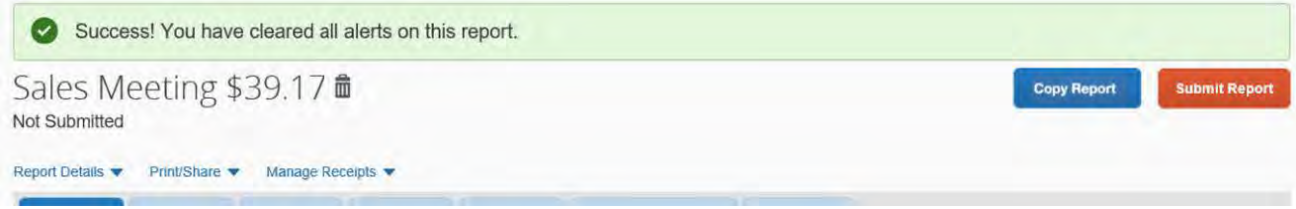


The alert message appears along with a **View** link. Click **View** to access the field with the issue.

Correct the issue and then click **Save Expense**.



When all issues are resolved, the **Success!** message appears.

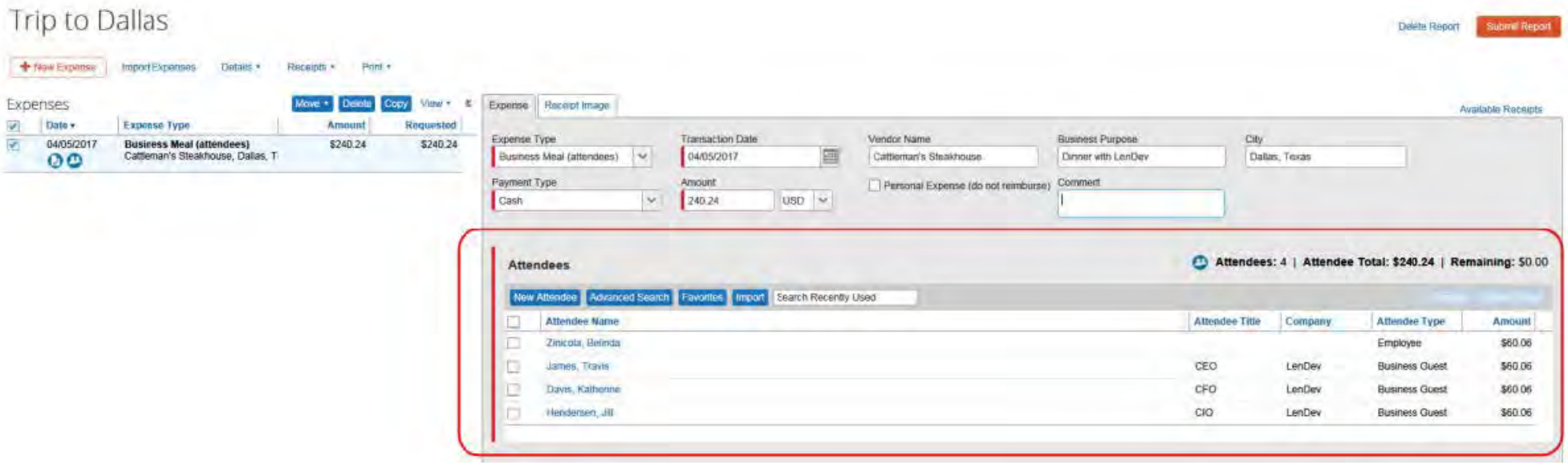


Attendees

In the NextGen UI for Concur Expense, attendees are no longer managed on the request's **Expenses** tab. Attendees are managed on a separate page, the **Attendees** page, providing more workspace for attendees and making the experience cleaner and less confusing.

Existing UI

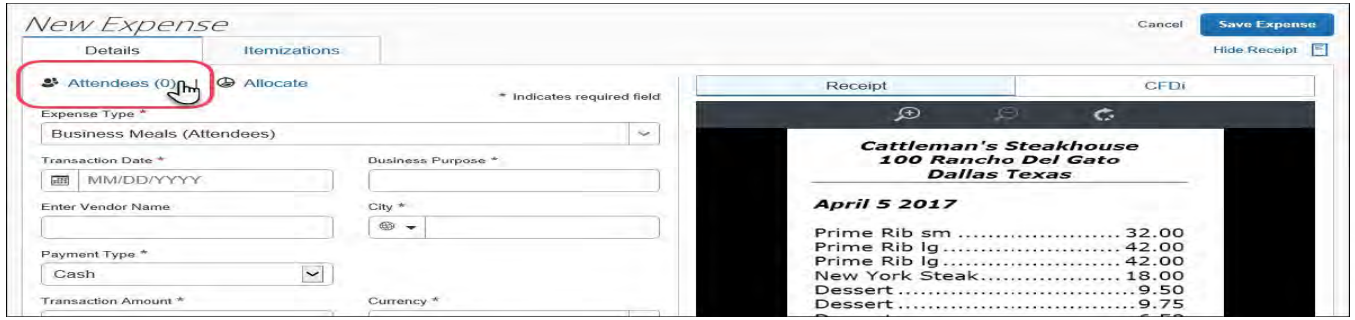
In the existing UI, the **Attendees** section looks like this on the **Expense** tab.



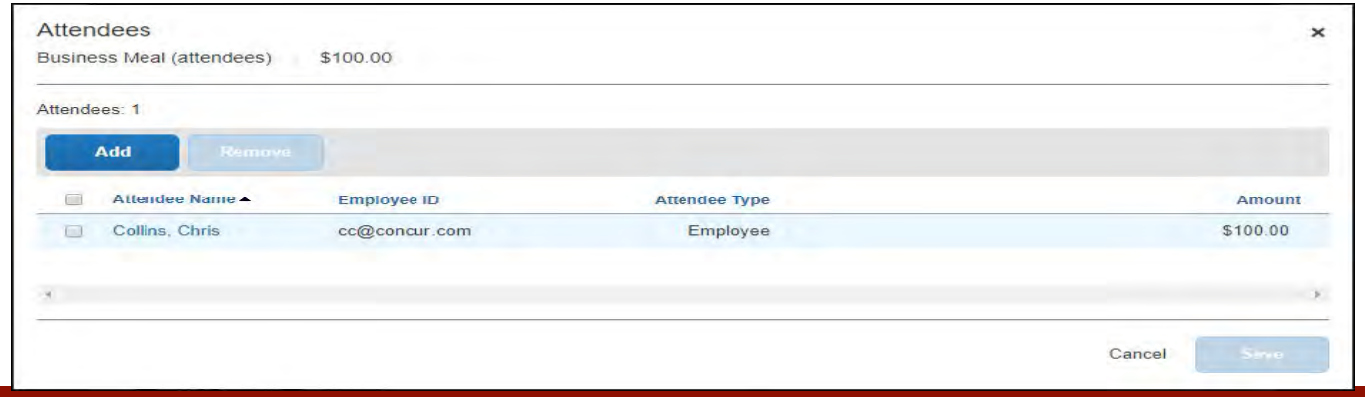
Attendees (NextGen UI)

In the NextGen UI for Concur Expense, attendees are added and managed on the **Attendees** page.

You can access the **Attendees** page by clicking the **Attendees** link on the **New Expense**, edit expected expense, and **Expected Expenses** pages. The **Attendees** link only appears for expense types that your company has defined as requiring attendees. Complete the expense and then click **Attendees** on the **New Expense** page.



The **Attendees** page appears. From the Attendees page you can add and remove attendees from the expected expense.



Hotel/Lodging Itemizations (Existing UI)

In the existing UI, the **Nightly Lodging Expenses** tab looks like this.

Trip to Dallas

New Expense | Import Expenses | Details | Receipts | Print

Exceptions

Expense Type	Date	Amount	Exception
Hotel	03/10/2017	$614.13	This expense requires a receipt
Hotel	03/10/2017	$614.13	Itemizations are required for this entry.

Expenses

Move | Delete | Copy | View

Date	Expense Type	Amount	Requested
04/05/2017	**Business Meal (attendees)** Cattleman's Steakhouse, Dallas, T	$240.24	$240.24
03/10/2017	**Hotel**	$614.13	$614.13

This expense requires a receipt
Itemizations are required for this entry.

TOTAL AMOUNT $854.37 TOTAL REQUESTED $854.37

Expense | Nightly Lodging Expenses

Check-in Date | Check-out Date 03/10/2017 | Number of Nights

Recurring Charges (each night)

Room Rate | Room Tax

Other Room Tax 1 | Other Room Tax 2

Combine room rate and taxes into a single entry

Additional Charges (each night)

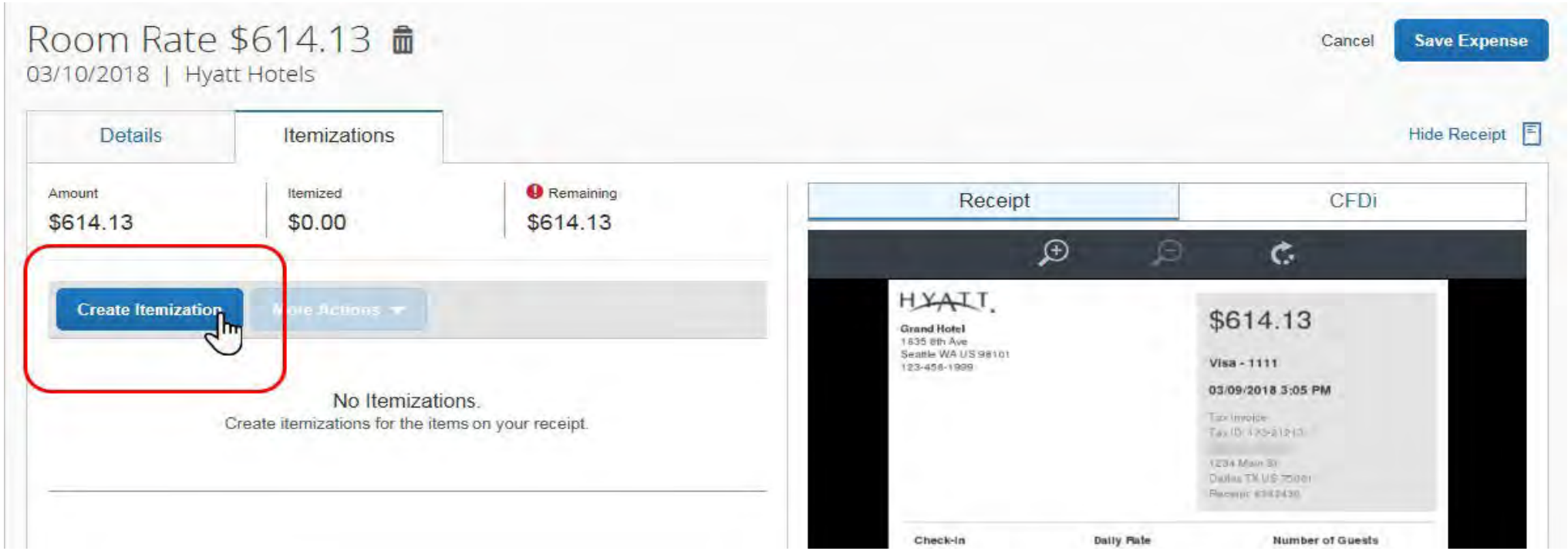
Expense Type: Choose an expense type | Amount

Expense Type: Choose an expense type | Amount

Hotel/Lodging Itemizations (NextGen)

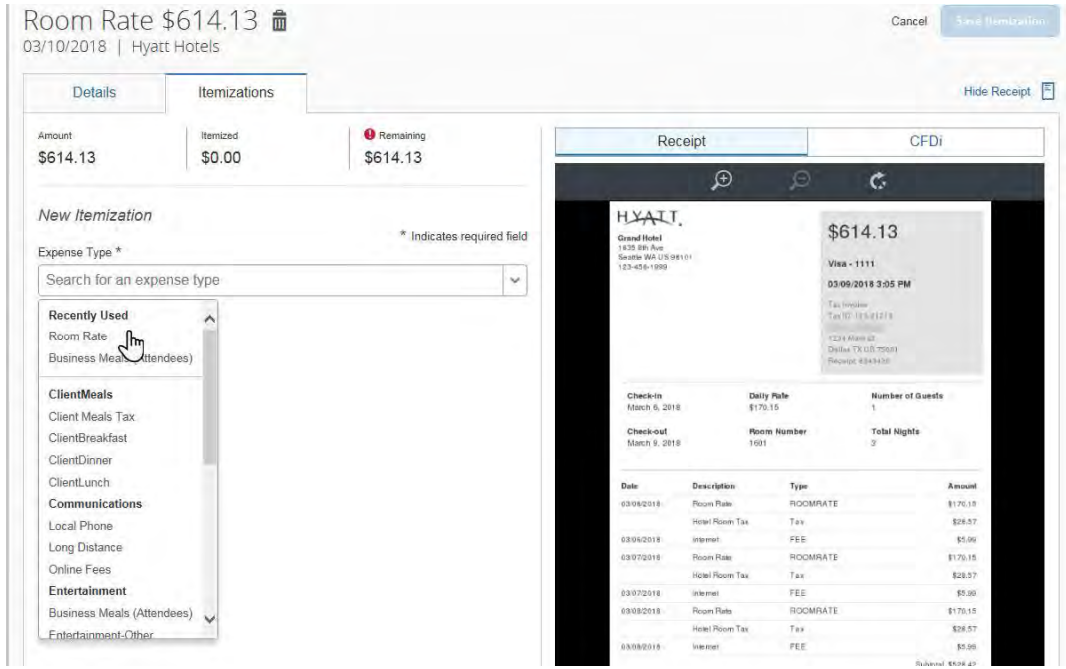
If you started the expense with a card charge (from the **Available Expenses** list), the itemizations may have been created automatically, depending on the hotel charge details provided by the vendor. If not, follow the steps below.

Click **Create Itemization**.



Hotel/Lodging Itemizations (NextGen)

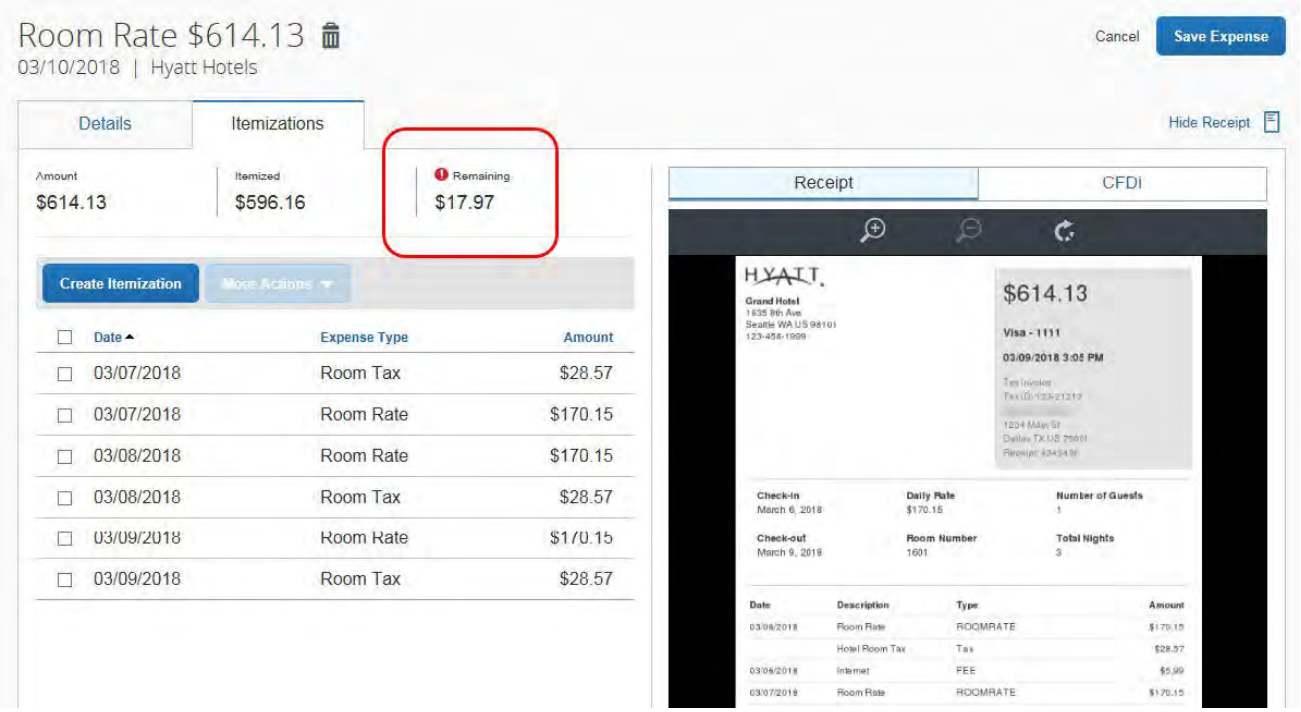
Click the desired expense type, in this case, *Room Rate*.



Enter the daily room rate and taxes and click **Save Itemization**. The check-in and check-out dates from the main hotel expense are used here to define the dates that require a recurring itemization.

Hotel/Lodging Itemizations (NextGen)

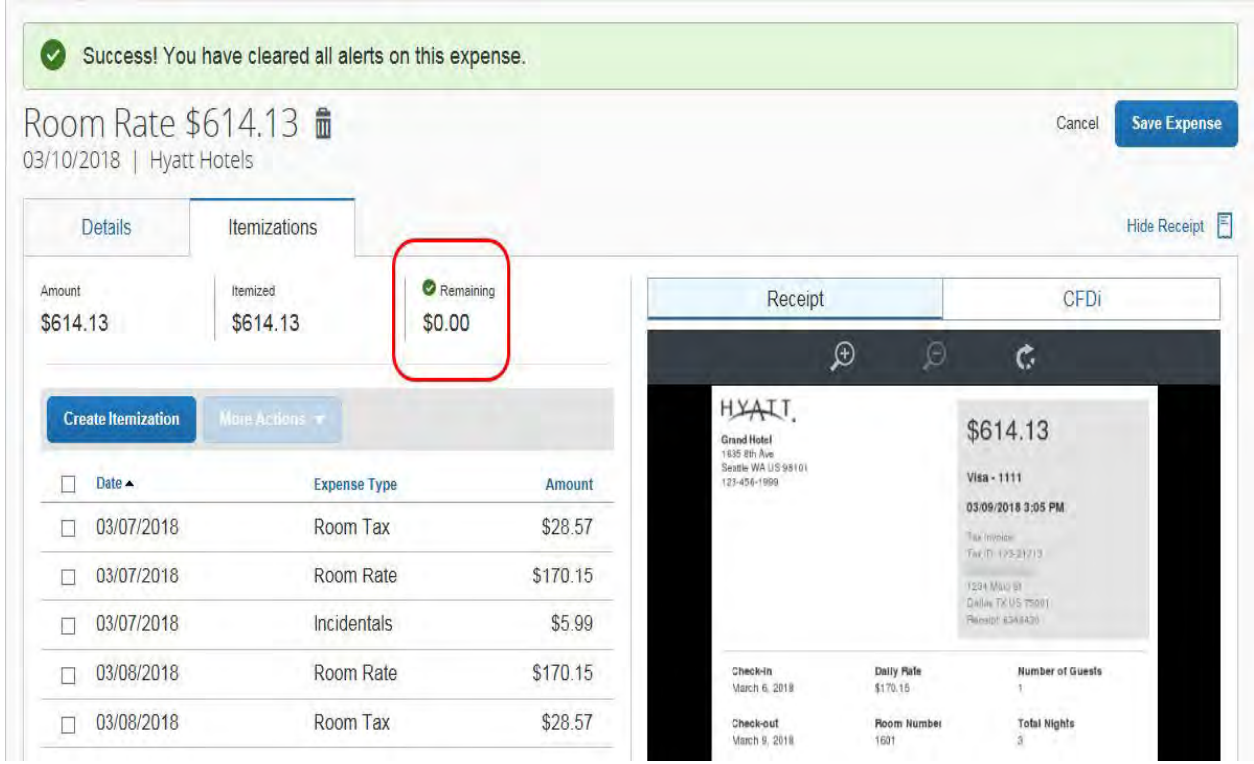
The itemizations appear along with any remaining balance.



If there is a remaining balance, click **Create Itemization** and select the expense type for the remaining amount, in this case, Internet (5.97 USD for each of the 3 nights). Complete the expense and then click **Save Itemization**.

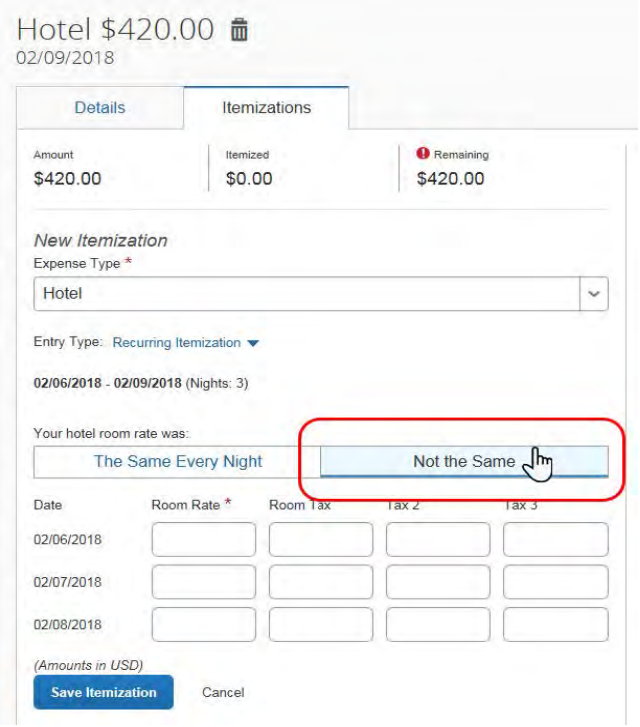
Hotel/Lodging Itemizations (NextGen)

An alert appears until the entire amount is itemized. A one-time success message appears when you clear all the alerts on the expense and the remaining amount is 0.00).



Not the Same" Tab

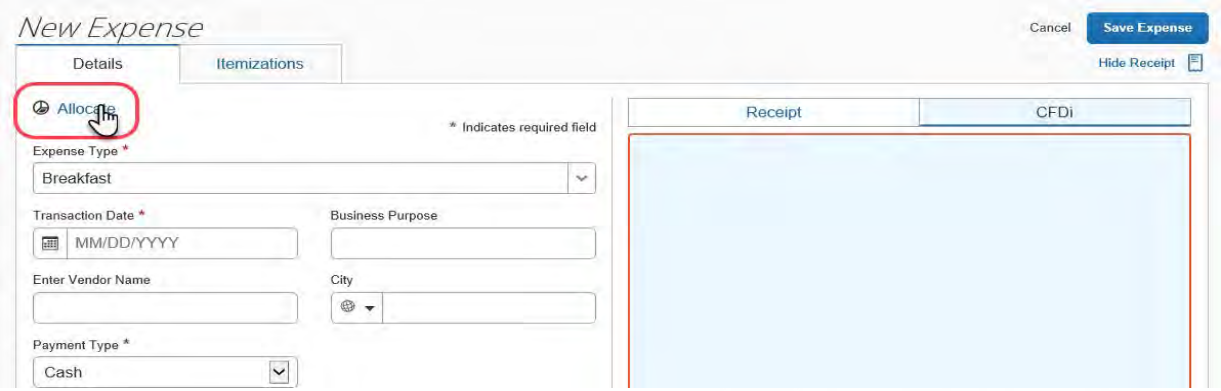
If the nightly rates are different, use the **Not the Same** tab to define the rates for each date of the hotel stay.



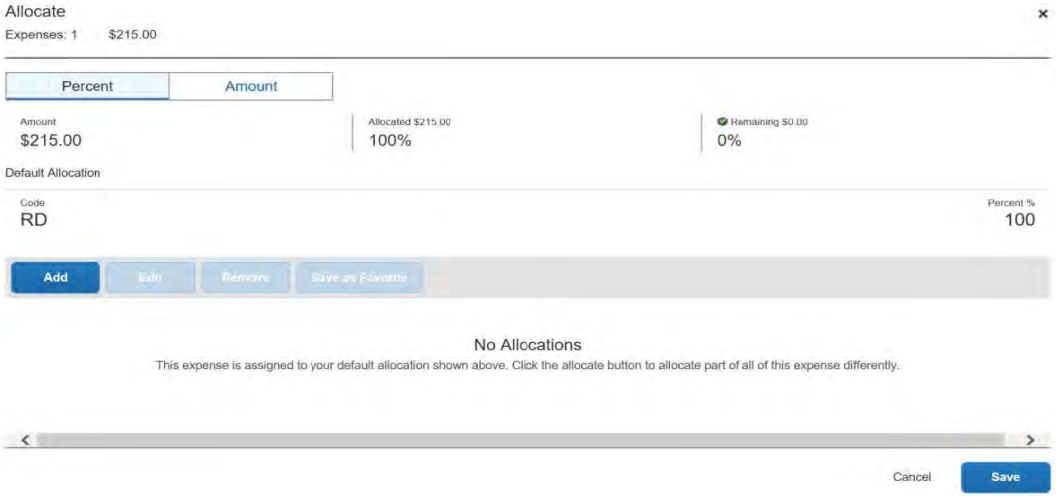
Allocations

You can allocate a single expense or several expenses at the same time.

Allocate an Individual Expense

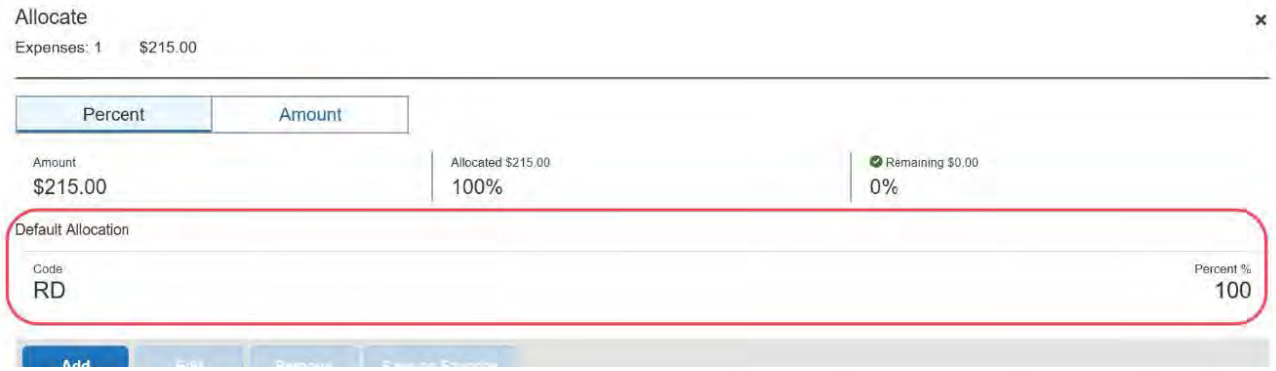


The **Allocate** page appears.

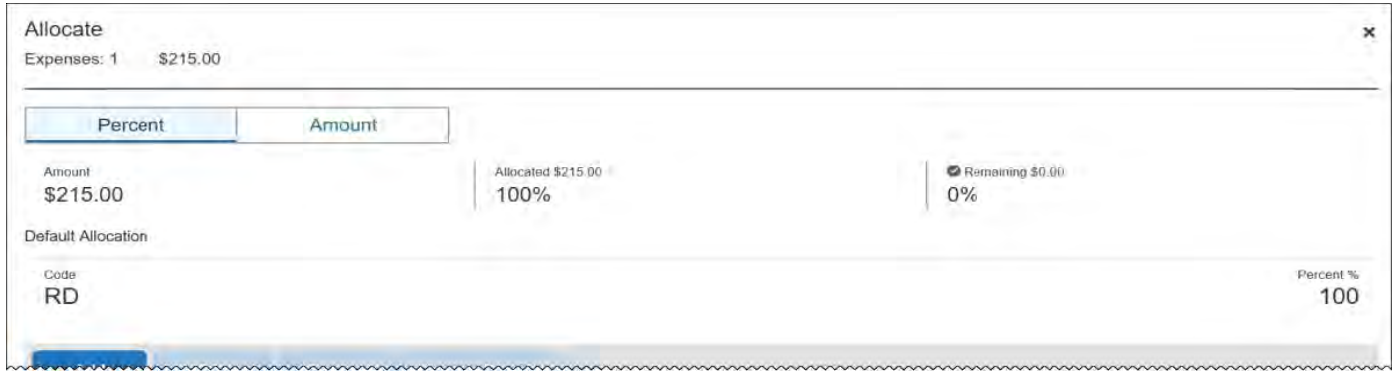


Allocations

On the "blank" **Allocate** page, a default allocation appears. It is a reminder to you that any amount that you do not allocate is automatically charged to your default allocation, for example, to your own department. In this example, the default allocation code (user's cost center) is *RD*.

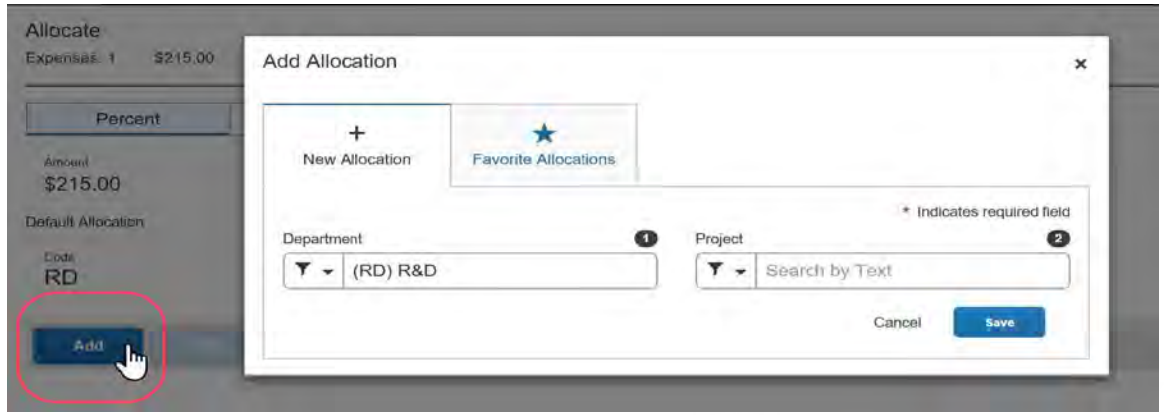


On the top of the page, click **Percent** or **Amount**,



Allocations

To add a new allocation, click **Add**. The **Add Allocation** window appears



On the **New Allocation** tab, select or enter the appropriate information for each field. Click **Save**. The allocation is added to the list and the ***entire*** allocation amount (100%) is added to the newly added allocation.

In this example, assume that Account Management is responsible for the entire cost of the expense.

Allocations

In this example, assume that Account Management is responsible for half and your department is responsible for the remaining half. Adjust the Account Management percentage to 50%; the default row (your cost center) automatically adjusts to assume the remaining 50%.

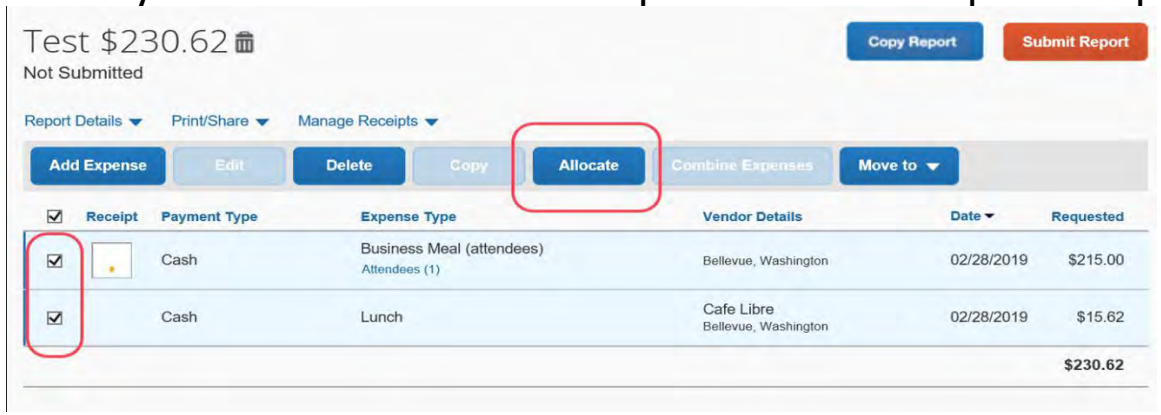
In this example, assume that Account Management is responsible for half and Sales is responsible for the remaining half. None of the expense is to be charged to your cost center.

Add as many allocations as desired. Depending on your configuration, you may be able to adjust percentages/amounts.

Allocations

Allocate Multiple Expenses

When you select one or more expenses on the expense report, the **Allocate** button becomes available. Click **Allocate**.



Note that the amount on the **Allocate** page includes only the selected expenses.