

The Concur User Experience Evolution 2014 Client FAQs

Objectives

Modernize the user experience and increase the usability of Concur applications that delight end users while maintaining the ability to apply and enforce company policy; To implement features and functionality for our customers in a manner that provides them with the maximum benefits our products offer, while minimizing impacts to their organizations and the change they need to manage; And, finally, to implement a stunning user interface designed to allow effortless navigation and access to features for all products on the web and mobile devices.

1. Why is Concur updating the User Interface?

Organizations and their end users are holding their enterprise solutions to higher standards as the requirements of their business change. Many are demanding that their enterprise solutions be intuitive, effortless, integrated, and allow them to accomplish their work more efficiently. Concur continues to be committed to delivering the best Travel, Expense, Invoice and related solutions for the company's 20,000 plus clients worldwide, and is focused building a solid foundation that will be leveraged to meet these goals. Enhancement and modernization of the user interface is the first step in this evolutionary process.

2. How big of a deal is this change and should I be worried?

To ensure Concur solutions focused on clients' needs, current and potential clients, as well as competitors, were engaged in usability studies and research to develop the overall design and implementation strategy. One key consideration was minimizing impact to clients in terms of the change to their organization.

To address this, the 2014 changes will be focused only on enhancement and modernization of the user interface for all products and pages on <http://concursolutions.com>, with the exception of some functionality

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changes on the Home, Expense, Administrative, and Approval pages, and enhancements to the Travel Summary and Booking Flow. All other core functionality and common tasks have been grouped together on certain pages to minimize clicks, steps and to simplify the overall experience. Note that localization, including language translation, will remain the same.

Helpful hints and task-based overlays will also be incorporated as well as a comprehensive launch plan that includes a website (<https://www.concur.com/en-us/introducing-concur-user-experience-updates>) and an updated [Training Toolkit](#).

Because of these steps, impacts to clients should be minimal, as was validated during our detailed usability studies. Participants in the studies were able to navigate and complete all tasks without any coaching, training or additional learning required.

3. What will be changing in 2014?

The enhancements planned for 2014 will focused on modernizing the current user interface for all product lines (Travel, Expense, Invoice) and solutions on <http://concursolutions.com>. In addition, the current Home Page will be enhanced to include not only a new interface, but also some functionality changes as well as additional capabilities. (See below table) The Expense management page will also be enhanced with additional changes and the current “Receipt Store” will be incorporated into the page. Finally, an enhanced summary will be included in the Travel Booking page, and there will be changes to the Approval page as well as the Administration pages to allow for a toggle option of the enhanced UI during a product preview period. There will NOT be a new web site for users to visit – www.concursolutions.com will remain the website address throughout and beyond the “preview” period.

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Detailed changes for 2014 are as follows:

<p><u>A redesigned, modern user interface for all products on concursolutions.com</u></p> <ul style="list-style-type: none">• Modern consumer based application “Look-and-Feel” that will be applied across all products• Consistent terminology, iconography, and interaction across web and mobile applications• Dashboard design with grouping of like functions and tasks together and positioning key steps needed to complete a process at logical locations on the page.	<p><u>Enhanced Home Page</u></p> <ul style="list-style-type: none">• Modern consumer based application “Look-and-Feel” that will be applied across all products...web, tablet friendly, and smart phones• Consistent terminology, iconography, and interaction across web and mobile applications• Dashboard design with grouping of like functions and tasks together and positioning key tasks at the top of the page• Effortless, streamlined navigation• A ‘Work to zero’ concept to improve management of tasks (i.e. number of outstanding tasks clearly shown at top and center of page, so user will be able to focus and resolve these accordingly).• In Product Messaging and customized New and Notes• A facts and stats section with key information for the user• Footer with easy access to help and other key information	<p><u>Enhanced Expense Landing Page</u></p> <ul style="list-style-type: none">• Key actions, alerts, and notifications are clearly defined and positioned to be easy to find• Vastly improved smart matching and handling of available expenses by combining key functions on the same page, in a logical order.• Receipts are displayed clearly to allow for quick viewing and reconciliation• Toggles allow users to quickly show different views of the expense• Everything related to the expense is on one screen
<p><u>Administrative & Approvals Enhancements</u></p> <ul style="list-style-type: none">• Ability for Admins to opt in/opt-out for themselves, a new role call “”, or for the whole company during the preview period.• New Approvals page	<p><u>Enhanced Travel Summary and Booking Enhancements</u></p> <ul style="list-style-type: none">• Enhanced and consolidated workflow to and trip summary.• Merging of a number of pop-ups into a single, easy to read page• Trip costs & other important details are clearly visible	

Common questions from clients about other aspects of Concur solutions that will be part of the User Experience Evolution include Concur Request, Expense Processor, Payment Manager, Reimbursement Manager, Integration Administrator, Expense Tools and E-Receipt Notifications. These will be receiving a new “Look and Feel.” For clients with **User Support Desk**, the support link and phone number will be located in the footer section.

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4. What about smartphones and tablets? Will they be impacted?

The Concur Mobile Web app, Expenselt and Triplt will not be impacted. However, if users use their mobile smartphone or tablet web browser to access <http://concursolutions.com>, then they would experience the enhanced user interface once they have been moved over to the new user interface on the browser as well.

5. What should I expect as an Administrator and how do I preview the new User Experience?

There will be a period where Admins will be able to preview and transition their company to the enhanced UI. While they can toggle on/off the new UI as often as required based on the following matrix, Concur recommends preparing your users and transitioning your company to the enhanced UI as soon as possible to ensure the smoothest transition for your users. End Users will NOT be able to toggle the new UI for themselves.

Admin Preview Options by Role for Enhanced UI					
Preview page links	Preview for self	Preview for EXP/INV/REQ employee groups	Preview for individuals	Preview for travel groups	Preview for Company
Role/Permission					
Professional * for Expense/Invoice/Request Configuration Administrator - includes both restricted and unrestricted					
Expense Configuration Administrator (not global)	✓	✓			
Expense Configuration Administrator (global)	✓	✓			✓
Invoice Configuration Administrator (not global)	✓	✓			
Invoice Configuration Administrator (global)	✓	✓			✓
Request Configuration Administrator (not global)	✓	✓			
Request Configuration Administrator (global)	✓	✓			✓
Permission/Role Administrator	✓		✓	✓ - if travel	
Company Administration	✓				✓

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Preview page links	Preview for self	Preview for EXP/INV/REQ employee groups	Preview for individuals	Preview for travel groups	Preview for Company
Role/Permission					
Standard					
Can administer (Expense) or Travel & Expense Administrator (Expense +Travel)	✓				✓
Is Invoice Admin? (Invoice)	✓				✓
Travel only Administrator (Travel)	✓				✓
Small Business Edition (Breeze)					
Can Administer (Expense)	✓				✓

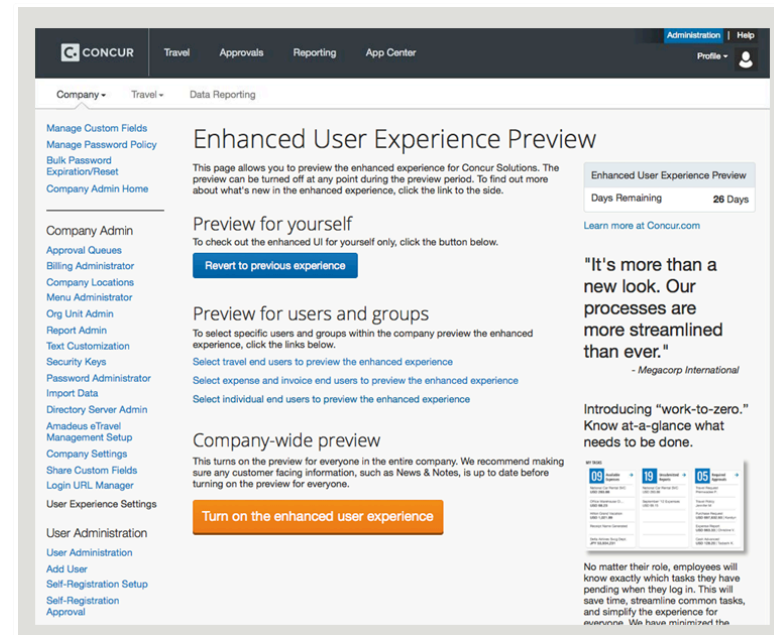
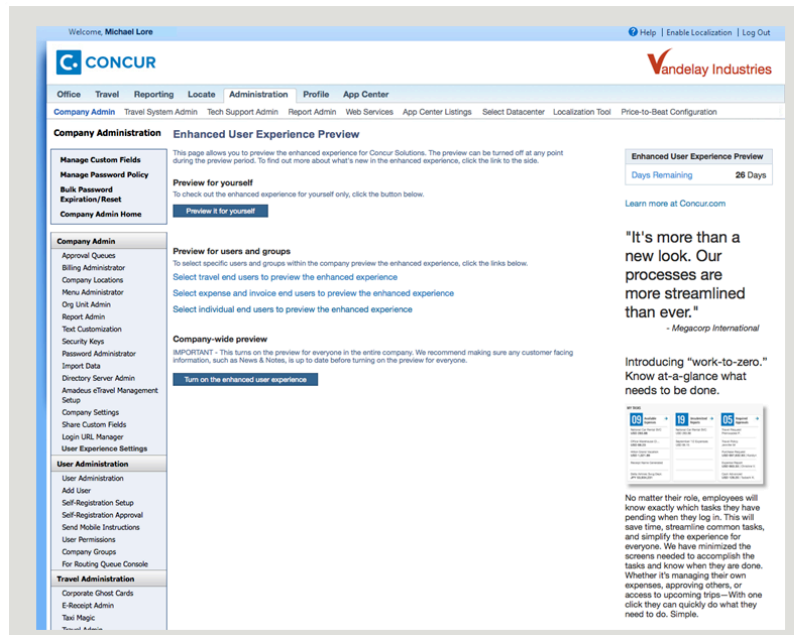
This strategy will give Admins sufficient flexibility to preview the enhancements for them and others they select prior to implementing for the whole company. Concur recommends communicating with end users and implementing as soon as possible to ensure the smoothest transition possible for your company. However, on January 31st 2015, all Concur users will be switched over automatically by Concur and the toggle capability will be removed. Administrators do not need to take any action at that point.

Admins can review one of the documents below for additional information on the toggle feature. Keep in mind these are draft versions and subject to change.

[Admin Transition Guide \(Professional\)](#)

[Admin Transitional Guide \(Standard\)](#)

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Admins with appropriate rights will have access to one of the screens above via the Administration menu option based on if they are using the current, or enhanced UI. Options in the center of the screen will allow users to determine who they would like to preview the enhanced UI and to toggle back to the current as needed during the preview period. Specific breakdown of roles/permissions and their capabilities are outlined on the table above.

Keep in mind that all underlying functionality, data, reports, trips, etc., will be preserved no matter which interface is used and is not impacted from the toggle feature. Also, at the end of January 2015, ALL users will be automatically switched over to the enhanced UI. No action is required by Admins, and the toggle feature will be disabled.

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6. During the “preview” or “toggle” period (late Oct 2014 to late Jan 2015), will the new UI be fully functional – can we submit expense reports, book travel and process invoices just as on the older UI?

Yes. Any user (whether admin or end user) can use the enhanced or current UI to perform any functions. If a user is toggled by the Admin onto the new UI and then is toggled back by the Admin for some reason, full functionality will still exist on both User Experiences. Remember – end users cannot move themselves to the enhanced UI or back to the current UI. Only Admins will have the permissions to move users. All end users will be permanently moved to the new user experience by Concur on January 31 2015 beginning at 12:01 am PST. There will be no Concur service downtime in connection with either initiating the preview period or the final switchover. The new user experience will have no effect on service.

7. How will the new user interface affect my data and any localized customization?

Your data, custom processes and custom labels will be unaffected by the new User Experience. Since only the “look and feel” of Concur solutions is changing, all existing localized information that a customer has entered for things like expense type names - basically anything that is maintained on the localization option under Expense Admin/Request Admin/Invoice Admin - will not be affected. That includes:

1. Custom Expense Types
2. Custom Field Labels
3. Custom Generated Automated Email Reminders
4. Custom Audit Rule Messaging
5. Custom Text such as message boards, report headers, notifications and pop ups
6. Custom approval processes
7. Language translations and country specific information
8. News and notes
9. Log in credentials
10. Bank information

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8. What other aspects of Concur's solutions will NOT be affected by the User Experience Evolution?

Aside from aspects of our solutions not affected that are listed above, other commonly inquired about aspects of Concur solutions that will NOT be affected are:

- Reports and reporting screens (including Cognos)
- Connectors (including QuickBooks)
- Extract files
- Batch processing
- Support (the process to file a support case will not be affected)
- Integration with Credit Cards
- Smart matching of expenses

Please note this list is not exhaustive.

9. So when can I see screens and access them so I can replace screen shots of my training materials or develop specific end-user communications?

A website page with key information related to “what’s coming” has been developed and [is accessible by clicking here](#). Concur recommends using the “preview” period to obtain screenshots, explore the new user experience and update any of your own training materials before rolling out to your end users.

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10. Will new users that Administrators create during the “preview” or “toggle” period go straight to the new User Experience, or will we have to take an action to move them over?

When a new user is created during the “preview” or “toggle” period, it depends on the new user’s role:

- **New user is added and is NOT an Admin:** The user will default to the “previous” UI and will need to be granted the privilege by the Admin to preview the new UI during the preview period.
- **New user is added and is granted Admin rights:** The user will default to the “previous” UI, and will have the ability to change this via the Administrative Menu option by using the toggle back and forth feature.
- **New user is added AFTER the preview / toggle period (after Jan 2015):** All newly created users regardless of their role/permissions will default to the new User Experience.

11. If my company has both Travel and Expense (or another combination of solutions), can we move products over to the new UI separately?

The toggle feature for the UI is based on login. If an end user uses both Travel and Expense and an Expense administrator moves that user to the new UI, the end user will see the new UI in all solutions. However, if an end user only has Expense and the company’s Travel admin moves over Travel users, the Expense-only user will NOT see the enhanced UI.

12. What if our Travel Management Company (TMC) manages Concur Travel for our company?

If your Travel Management Company (TMC) manages your Concur Travel solution, they have created a migration plan for your company to move to the enhanced UI. Your TMC will contact your Travel Manager to communicate and discuss your organization’s timeline for moving to the new user experience. If you are a Concur Expense or Invoice administrator, please reach out to your Travel Manager so that you are aware and prepared for the migration.

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13. Why did the icon colors change in the new user experience?

- Concur is committed to ensuring all products are 508 compliant. 508 compliance rules and regulations ensure products meet accessibility requirements for individuals with disabilities and have strict requirements for coloring, size, text and other qualities. In order to adhere to these standards, particularly the factors above, the UX team selected the icon color.
- The enhanced UI is designed to have the symbols, as well as the hover-over information, to describe the task that needs to be completed. This was part of the intuitive design of the system and was tested thoroughly during usability studies to ensure this was the correct approach.
- One of the key goals of the enhanced UI was to have a consistent look-and-feel across all products and devices as well as use colors to draw users' eyes to desired locations. In order to meet these goals, our UX team tested a number of colors and determined the one selected was the best to meet all requirements.
- The new icons are not graphics but instead are character-based. Best practice for user experience is moving away from using graphics icons as a method to increase efficiencies in response times and page loads. Concur made the decision to adopt this standard by using characters to represent tasks instead of graphics.

14.If my company has a test site, when does that make the switch?

Since test sites do have the same coding as production sites (live sites), each test site will get its own separate toggle ability just like your production site. For example, an administrator could toggle the new user experience on for their test site before toggling their production site. Both test sites and production sites will be moved over to the enhanced UI on January 31 2015 at 12:01 am PST.

15.Why do I have to switch and when do I need to switch?

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Concur's goal is to continue to evolve the user experience to ensure products meet client's needs. This, along with technology and competitive drivers, are key inputs to internal strategies and will continue to drive innovation. As Concur continues to move down the path of offering the best solutions for our clients, the company must also ensure that we are leveraging all these factors, or we will not be able to move product lines forward and continue to offer the best solutions for clients. Concur recommends transitioning your company to the enhanced UI as soon as possible prior to January 31st. This is to ensure the smoothest transition possible for your users. All users not on the enhanced UI will be transitioned to it on January 31 2015 beginning at 12:01 am PST. There are no exceptions to this transition time.

16. Does my company need to dedicate any IT resources to aid in the transition?

If you have users on Internet Explorer 7 (IE 7), you may need to reach out to your IT department to help determine how to upgrade browsers away from IE 7. Other than IE 7, you will not need your IT department to do anything related to the User Experience Evolution. [Click here to read more on IE 7.](#)

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