

Next Generation Expense User Interface

Next Generation (NextGen) Expense is the continued evolution of the SAP Concur user experience. It is the result of thoughtful design and research that provides a modern, intuitive and streamlined experience for creating and submitting expense reports. Users of all types can easily understand what they need to do and how in order to get their expenses done quickly and accurately.

Why is SAP Concur updating the user interface (UI)?

SAP Concur is dedicated to the consistent improvement of our products. How users interact with technology changes over time, along with their needs and expectations. We are constantly listening to our clients and actively soliciting feedback on how we can improve the user experience. NextGen Expense incorporates these up-to-date trends and customer inputs to deliver a superior experience.

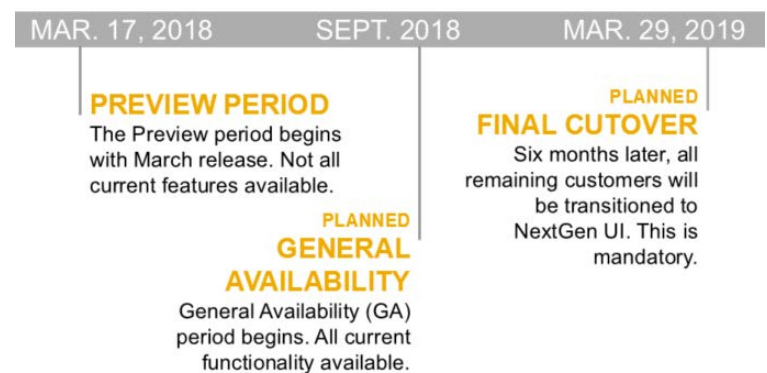
In addition to enhancing the user interface, we are also taking advantage of technology to allow us to react more quickly to customer requests and the ever-changing industry.

What products and editions are impacted? What about the Concur mobile app?

This user interface evolution only applies to Concur Expense irrespective of edition (Professional or Standard). The Concur mobile app will not change as a result of this UI change.

When is it coming?

Limited Concur Expense functionality begins in our planned Preview period with the March 2018 release on March 17, 2018. You can expect current functionality availability with General Availability (GA) currently planned for September 2018. Your organization will have six months to transition on your own time until the planned mandatory Final Cutover on March 29, 2019. Any customers that have not moved to NextGen Expense by the Final Cutover will be moved automatically.



When will the planned mandatory final cutover be?

All customers who have not moved to the NextGen UI on their own are planned to be automatically migrated at 12:00AM (midnight) Pacific Standard Time on Friday, March 29th, 2019. No action is required if you have not already moved by this time.

Will all customers be required to move to NextGen Expense?

Yes. This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for streamlining support and other services. It will also allow SAP Concur to continue to enhance our solutions.

How should we plan our transition?

We have detailed documentation to guide Expense administrators on how to move their users to NextGen Expense along with recommended configuration changes. These guides detail the timeline and transition options. Details may change and the guides will be updated over time, so check back often.

- [Professional edition](#)
- [Standard edition](#)

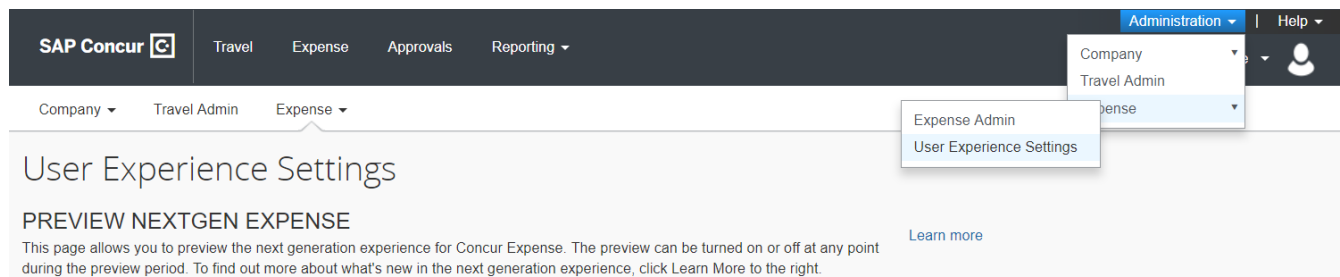
How should we use the Preview period?

The Preview period provides an opportunity for your project team to familiarize yourselves with the NextGen Expense UI, to update any internal documentation, and to plan your communications and timing for rollout. Consider the features that are not yet available on the NextGen Expense UI before transitioning. There is [a list of features that are not yet available](#), as well as a handy tool to help you decide what groups to transition over and when ([Professional](#) or [Standard](#)). If your organization isn't using any of the features that are not yet available, then you can transition as soon as you're ready.

How do we get started with the Preview period?

To get started, follow this path from within Concur Expense: Administration > Expense > User Experience Settings.

- **Professional Edition:** Expense Admins may enable themselves, the entire organization or any subset of users
- **Standard Edition:** Expense Admins can enable themselves or the entire organization only



Note this Professional edition screenshot is different for Standard customers.

Use the same tools to return to the current Concur Expense user interface (UI) as you used to turn on the NextGen Expense UI. Follow this path from within Expense: Administration > Expense > User Experience Settings.

What functionality will not be available during the Preview period?

Not all functionality will be available during the Preview period. The list of unavailable features at any given time [can be found here](#). The list of features will be continually updated, so please refer to the published list for current details. As of March 2018, the list is as follows:

Standard edition

Attendee import from Outlook	AU: Travel Diary
JP: e-Bunsho timestamp	DE or US: Travel Allowances
JP: Japan Public Transportation	

Professional edition

Travel Allowances	Sponsored Guest	Company Billed Statements
Redirect Funds	Travel Diary	Cash Advance Requested by User
Conditional Display Fields	JP: e-Bunsho timestamp	Attendee import from Outlook
Configured Itemization Wizard	JP: Japan Public Transportation	Attendee Import from Excel

During the Preview Period and planned General Availability Period, will SAP Concur be implementing additional changes, features and enhancements?

Yes. SAP Concur is expecting to provide scheduled releases of features, functionality enhancements, and issue resolutions during these periods. Some of these features will only be released on NextGen Expense. During the Preview Period, these Concur Expense releases are planned twice per month, but the frequency may be adjusted depending on the issue. Changes will be incorporated into release notes, however changes may be published prior to appearing in the release notes as warranted. During and after General Availability, releases will resume their standard monthly cadence. Information about these changes will be accessible from the Learn More link on the User Experience Settings page.

What new major features and enhancements are *only* being built on NextGen Expense UI?


During this transition time, certain enhancements will only be released on NextGen Expense, meaning that your organization *must* transition to NextGen Expense before being able to use the new / enhanced feature. Below is a list of major features that will only be release on NextGen Expense. Consider your organization's timeline carefully if you want to use one of these features sooner or later.

- New Travel Allowance Service
- Enhanced options for controlling deletion of card transactions
- Multiple expenses linked to one receipt image
- Automatic creation of an expense report from an approved Request

Please note that this list is *not* exhaustive. Common questions about these features are:

When are these features available? The availability of new features will be covered in the Concur Expense release notes as they are released.

What do I need to do in order to use the new Travel Allowance service? Customers who want to use the new Travel Allowance service will need to first transition to NextGen Expense UI. Please note



that the NextGen Expense UI will allow you to continue to use the current Travel Allowance service without changes. SAP Concur is developing a plan to ensure the best transition possible. Additional communication regarding migration plans for existing customers of Travel Allowance will be forthcoming.

What will the end user experience be when we transition over?

The first time an end user opens Concur Expense after his/her Expense Administrator transitions the organization or group to the NextGen Expense UI, the user will see a notification message welcoming him/her to the new Concur Expense.

After the March release, the first time the end user creates an expense report (or opens a previously created expense report) in the new UI, the user will see a 1-slide 'product tour' in English. Later in 2018, this will be replaced with a 5-slide 'product tour' and text translation that points out some of the UI changes and the benefits of those changes for the user.

What methodology was used to create the new UI?

NextGen Expense was built from extensive user research and data analytics that included 680 1:1 conversations, 58 usability studies, 3,000+ survey responses and 1.3B monthly user actions. The UI underwent both internal and external trial period testing. External trial customers represent nearly 300 organizations across a spectrum of sizes and industries. The goal is to pressure-test the new UI across a broad range of use cases, document the outcomes and make changes accordingly.

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.

What exactly is changing?

While changes can be seen throughout the product, the primary updates are being made to allocations, itemizations, and attendees. For a detailed list of all changes, [please refer to the End User Guide](#). This guide will be continually updated as new features become available so please refer to this online document for the most recent information. It is not recommended that you save local copies.

Specific pages / activities include:

- Expense Landing page
- Expense Report page
- Expense Entry page
- Report Modals
- Itemizations
- Attendees
- Allocations
- Mileage



Are any icons being removed or altered? If so, why?

Yes, a number of icons have been removed. As a result of user testing we learned much of our iconography did not have significant meaning to our users. By removing the icons, cleaner space was created that allowed for clearer text and direction to guide the user through exactly what needs to be done to complete their expense report.

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

No. Only the end-user experience is changing.

How does this impact my data or user transactions during the process?

There will be no impact to data or transactions; only the UI used to access that data has changed. Users can take any action on either UI during the transition period.

How does this impact reporting, web connectors, etc.?

There will be no impact to any backend processes or reporting. Only the Concur Expense UI has changed.

How might this impact any custom translations or labels?

This should not impact any translated labels that are already in place.

Concur Expense will suggest specific areas of your configuration where a text review might allow better optimization of your exception messages.

What will happen if my users and I are working in Concur Expense during the mandatory Final Cutover at 12:00AM on March 29, 2019?

Nothing will happen if a user is signed in to Concur Expense during the mandatory cutover. Users can continue to work on the current Concur Expense UI and will only see the NextGen Expense UI after they sign off and then sign back on. No other action will be required from the user.

How are test sites being migrated to the NextGen UI?


When they are released, the same tools available to Expense Administrators in the production sites will be available on test sites. Deploying NextGen UI in your test site will not impact your production site. Just like production sites, all test sites will also be moved to NextGen Expense on March 29, 2019.

Are there any special requirements for the new UI to function? (browsers, bandwidth, etc.)

The standard list of [supported configurations](#) will apply. Note that clients running Internet Explorer 11 in compatibility mode will need to turn that off for SAP Concur sites.

How do I provide feedback on the new UI?

Depending on your type of feedback, there are two methods, both through the Customer Support Portal accessed by Authorized Support Contacts. These are the standard methods to provide feedback.

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- If you have a change that would be considered an enhancement to the new UI, submit a Solution Suggestion through the Customer Support Portal. In your suggestion, please include the phrase “NextGen UI”.
 - If you believe you have found a mistake or bug, please submit a Support Case. In your case, please include the phrase “NextGen UI”.

If you have other questions, reach out to your SAP Concur account team.

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