Concur New User Interface
Overview

- Procurement Services has been working with Concur in order to improve the usability experience based on the feedback received from the University community.
- Concur has launched a new User Interface in order to improve the usability experience of the users and the interface was piloted with a group of users.
- Pilot feedback has mostly been positive and has also helped identify some challenges related to the new interface.
- The University community will be switching to the new user interface at end of January 2015.
- Concur will be releasing next phase of improvements sometime in spring/summer of 2015.
Getting started

- New user interface offers easier and more intuitive navigation
- Home and Expense pages are redesigned and easier to use
- True dashboard experience with ‘work to zero’ focus
We're excited to show you what we've done

We've made quite a few changes to make your key tasks easier - making you more efficient. Take a short tour and learn what's new.

- Show me tips next time

Let's get started!
Homepage Cont’d

• Key actions are highlighted at the top of the screen
• ‘Work to Zero’ – Know at a glance what work needs to be done
• All approvals are easier to access and are located in one area for better accessibility
• The booking process is simplified through detailed steps that are logically organized
• The Trip Summary clearly shows users where they are in the process.
Expense landing page

Active Reports

Create New Report

NOT SUBMITTED

scott
$100.00

NOT SUBMITTED

scott
$0.00

Available Expenses

Drag expenses on the report

Available Receipts

Upload New Receipt
Expense landing page  *Cont’d*

- Key actions and notifications are clear and easy to find
- Everything users need to manage expenses (*active reports, available expenses, available receipts*) is located on a single screen which allows faster report creation
- Drag-and-drop of expenses on report is now available
- Receipts and related details appear on the same page, allowing more efficient matching to reports
Pilot Feedback

• Home page is better organized and provides visibility into what needs to be done
• Colored title bars on expense reports makes it easier to distinguish between different reports status
• Seeing all the receipts on expense pages serves as a reminder that more reports need to be created
• Navigation is much improved and easier to follow
Pilot Feedback Cont’d

• Some pilot users have experienced difficulty with the white background and small fonts
• Actual expense report creation is still the same as in the older User Interface
• Sign-Out location has been changed and harder to find
How does this impact you?

– As an approver
  • All approvals are located in one place and are easier to find
  • Adding additional approver is different in the new user interface

– As a delegate
  • Administering for other users is in a new location
  • Receipts and related details are located on the page to enable more efficient matching to reports
How does this impact you?

• What does the change mean for you?
  – As a submitter
    • Adding ad-hoc approver has been changed in the new UI.
  – As a reviewer
    • The reports to review are under Approvals
  – Job aids will be updated to reflect the new user interface
Next Steps

• Challenges reported by pilot users have been shared with Concur to be analyzed
• Some of the issues have already been resolved and others are being evaluated by Concur
• Procurement Services will start planning for the next round of enhancements around expense report creation scheduled to be released around spring/summer of 2015
• Procurement Services is also working on releasing the mobile app to campus as well evaluating other apps which will improve the usability experience for the users. The mobile release is scheduled for late winter in 2015.