User interface changes reference guide

Introduction

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.

Homepage changes

The look and the feel for the homepage have several changes to improve the user experience. In the current user interface the homepage for Concur is known as My Concur. The homepage in the new user interface is called Home. The new Home page is organized with more of a dashboard look and feel.
‘Work to Zero’ – The **new user interface** focuses on making it easy to know at a glance what work needs to be done.

- **Quick Task Bar (New*)** - Key tasks are highlighted at the top of the screen. This is dependent on user’s role and permissions. The end user taskbar will look like:

![Quick Task Bar](image)

The **+New** Task provides additional options:

![New Task](image)

- **My Tasks** – This section replaces the **Active Work** section on the **My Concur** page. It provides quick access to users’ most important tasks.

**Current user interface**

![Current User Interface](image)

**New user interface**

![New User Interface](image)
- **Approvals**: All approvals are easier to access and are located in one area for better accessibility.

  **Current user interface**

<table>
<thead>
<tr>
<th>Approval Queue (0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Name</td>
</tr>
<tr>
<td>------------</td>
</tr>
</tbody>
</table>

  **New user interface**

<table>
<thead>
<tr>
<th>MY TASKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>00 Required Approvals →</td>
</tr>
<tr>
<td>00 Available Expenses →</td>
</tr>
<tr>
<td>04 Open Reports →</td>
</tr>
</tbody>
</table>

  - **Trip Search**: Trip search has been given a new look and text has been replaced by icons.

  **Current user interface**

  **TRIP SEARCH**

  - Booking for myself | Book for a guest
  - Air/Rail Search
  - Class or Service: Economy class
  - Search flights by: Price, Schedule
  - Flights with no double connections
  - Search

  **New user interface**

  **Trip Search**

  - Plan your flight, car and hotel:
  - e.g. Flight from JFK to Paris on Tuesday
  - Search

  **Air/Rail**

  - Car, Hotel, Limos, Rail, Flight Status
  - Round Trip, One Way, Multi-Segment

  **Departure City**

  - DTW - Detroit Wayne County Arpt - Detroit, MI
  - Find an airport | Select multiple airports

  **Arrival City**

  - Find an airport | Select multiple airports

  **Departure**

  - Depart: 08:00 am, 10:00 am
  - Return: Depart: 05:00 pm, 08:00 pm

  - Pick-up/Drop-off car at airport
  - Find a Hotel

  - Refundable only air fares
  - Class of Service: Economy class
  - Search flights by: Price, Schedule
  - Flights with no double connections
  - Search
• **Trip Summary**: The enhanced Trip Summary in the new user interface clearly shows users where they are in the process of booking the trip.

• **Alerts** – The look and feel of this section has been changed in the new user interface.

```
Current user interface

Travel Alerts
TripIt creates instant mobile itineraries for business and personal trips.
Simply connect your Concur account to TripIt. Connect to TripIt No thanks
You haven’t signed up to receive e-receipts. Sign up here

New user interface

ALERTS

TripIt creates instant mobile itineraries for business and personal trips. Simply connect your Concur account to TripIt. Connect to TripIt No thanks
You haven’t signed up to receive e-receipts. Sign up here
```

• **Company Notes**: This section provides information related to processes and procedures, best practice, training and resources available to end users.

```
Current user interface

Company Info

UNIVERSITY OF MICHIGAN RESOURCES
Find out more about the U-M Travel and Expense System, look up answers for Concur FAQs, and review Concur Best Practices. Access Concur Training & Resources - (click Start to view all Concur training and resources in a single page). For system navigation help contact dougp@umich.edu - 734.764.4357 (4-Help). For answers to policy questions contact procurement_services@umich.edu - 734.764.0212, opt 2

UNIVERSITY OF MICHIGAN RESOURCES
Helpful Hints – Preparing an Expense Report Click on the following links for more information on these topics:

<table>
<thead>
<tr>
<th>Per Diem</th>
<th>Personal Car Mileage</th>
<th>E-Receipts</th>
<th>Foreign Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel Reservations</td>
<td>Editing Itineraries (Per Diem)</td>
<td>Importing PCard Transactions</td>
<td>Complete List of Helpful Hints</td>
</tr>
</tbody>
</table>
```
Note: in order to see resources in Company Notes the end user must click on Read more.

- **Facts & Stats (New*)**
  A new Facts and Stats section has been introduced in the new user interface. At this point, the data for this section is not up to date and we are working with Concur to enhance this feature to provide more timely data.

  ![FACTS & STATS](image)

  **Did you know?**
  89% of business travelers agree that mobile technology improves their travel experience.

- **Trips:** Trip information has been made more robust and actionable.

![Current user interface](image)
New user interface

My Trips

This section appears just below the Trip Search section.

Returning to home: Once you leave the home page, the Home menu is replaced by the Concur logo. To return to the home page, click the Concur logo.
Profile Settings

The user’s current profile page looks similar to one of these, depending on the user’s roles/permissions.

To access the profile settings in the new user interface, User now has to click **Profile > Profile Settings**.
Sign Out

In the current UI, the user clicks Log Out in the upper-right corner.

With the New user interface, the user will have to click on Profile > Sign Out.
Delegate changes

In the new user interface, delegates will have to use Profile to select the user they wish to administer for.

**Current user interface**

![Current user interface](image)

**New user interface**

![New user interface](image)

Note: If the delegate has 10 or less users, then they appear in a dropdown list. If there are more than 10, then the user types in the first few letters of the desired user's name and selects from the search results.

The Profile menu option then becomes Administer for <name> and the single “user” icon becomes a double “user” icon.

![Profile menu option](image)

To return to working for himself/herself, the user clicks Administer for and then clicks End admin session.

![End admin session](image)
**Travel Page and Menu**

In the current user interface, it is known as the Travel home page.

In the **New user interface**, it is known as the Travel page.
Enhancements done to Travel

- **Travel Wizard**
  Icons replace the text for each of the segment types in the Travel Wizard

- **Search using Text:** The "plan your flight car and hotel" text search has moved to the bottom of the page in the new user interface.
• **Alternate traveler:** The location to choose an alternate traveler (booking as a travel arranger for another employee or a guest) has changed in the new user interface.

  **Current user interface**

  ![Current user interface](image)

  **New user interface**

  ![New user interface](image)

• **Guest booking:** Booking travel for a **guest** is now part of **Trip search** in the new user interface.

  **Current user interface**

  ![Current user interface](image)

  **New user interface**

  ![New user interface](image)

• **Travel Policy:** In the new user interface, travel policy has been provided as a link in the footer versus a menu option as it appears in the current user interface.

  **New user interface**

  ![New user interface](image)
Expense page and menu

Expense Page

Current UI:

New user interface:

The default display shows the user’s active reports and available expenses (formerly known as Smart Expenses).
The enhancements are:

- **Tiles**: The user’s active reports are shown as tiles. Name, amount, status, and comments appear on each tile. The user clicks a tile to open a report.
- **Report Library**: To the right of the tiles is the Report Library link. The user clicks this link to see all reports for the quarter – active, paid etc. The user can change a different timeframe to view reports using the ‘View’ dropdown.

  ![Expense Home](Image)

  Reports for this Quarter

  - **New**: To create a new report, the user clicks the Create New Report.
  - **Available Expenses**: Available expenses (formerly known as Smart Expenses) appear at the middle of the page. The user can add them to an expense report via drag-and-drop or menu options.
  - **Available Receipts**: Available receipts appear at the bottom of the page. The user can attach them to an available expense.
• **Adding ad-hoc approver** – Adding an ad-hoc approver has been changed in the new user interface. You now have to click on + sign to add new approvers.

**Current user interface:**

![Current user interface image]

**New user interface:**

![New user interface image]