



# Transition Guide for the Concur Enhanced User Interface

Rev: January 29 2015

The Concur User Experience Evolution is a key initiative that will accomplish three primary goals.

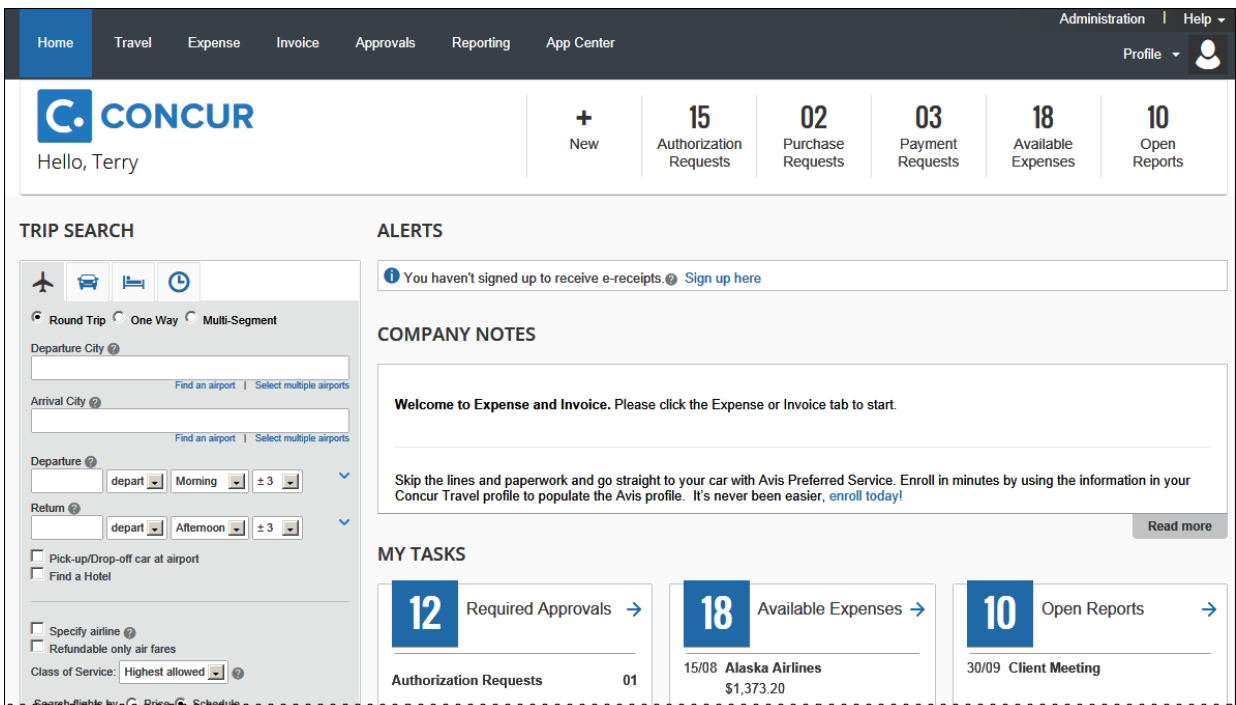
- Modernize the user experience and increase the usability of Concur applications, while maintaining the ability to apply and enforce company policies
- Implement features and functionality in a manner that provides clients with the maximum benefits for their Travel, Expense, and Invoicing needs, while minimizing change-management impacts
- Allow effortless navigation and access to features for all products on the web and mobile devices

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## Enhanced and New Pages

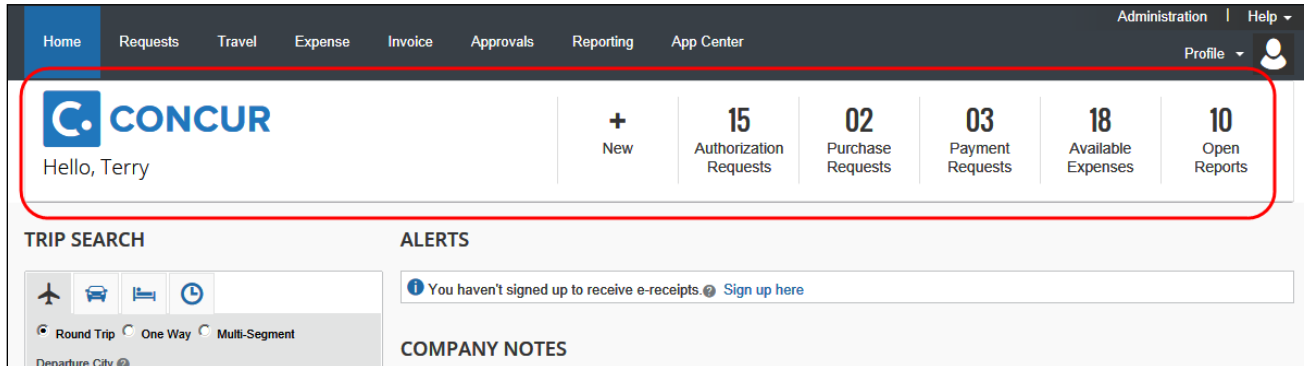
### Concur Home Page – Fully Redesigned

In the current UI, the home page for Concur is known as **My Concur**. In the enhanced UI, the page is called the home page.



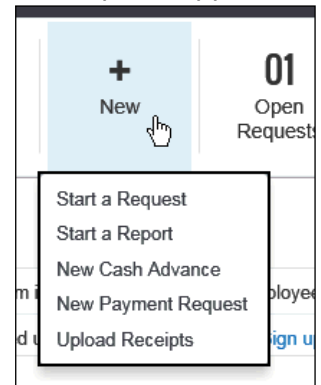
## QUICK TASK BAR

The new Quick Task Bar gives users quick access to their most important tasks. The tasks that appear depend on the user's roles/permissions.



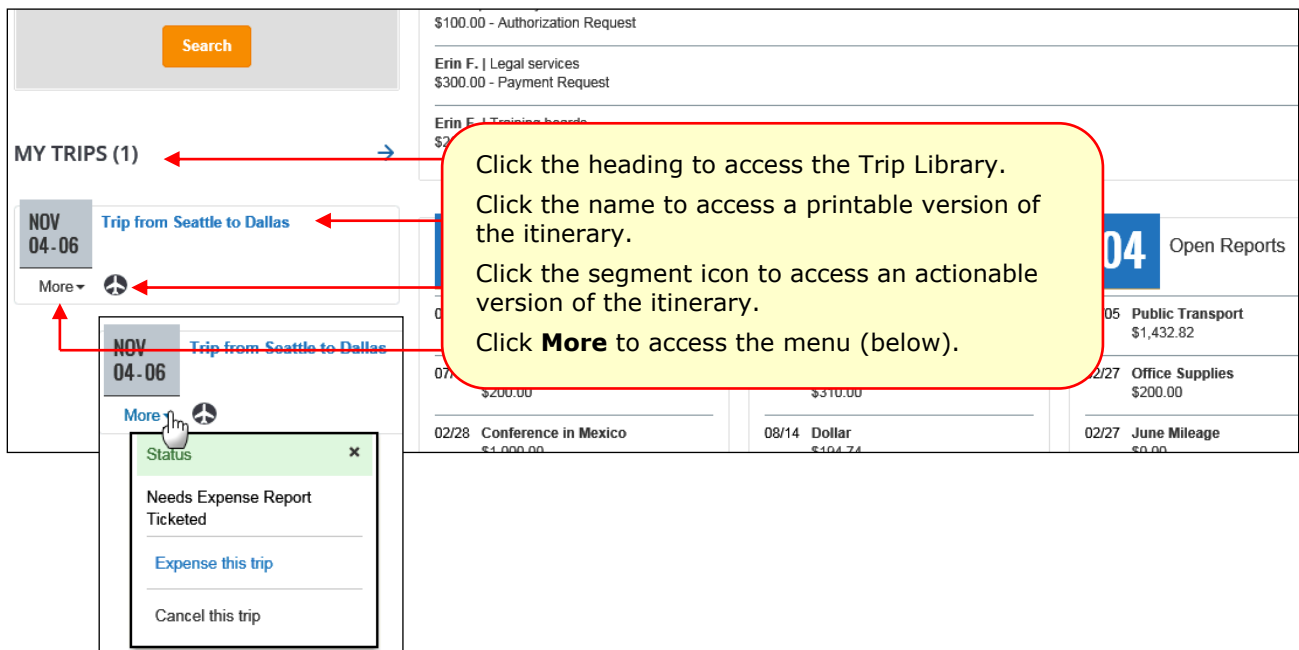
It also includes the count of associated tasks. As shown here, this user has 10 open reports.

- The user clicks a task for quick access to the associated page. For example, when the user clicks the **Open Reports** task, the page listing the user's expense reports appears.
- The user also has 18 available expenses. (*Available Expenses* is the new name for *Smart Expenses* – card charges, receipt images, e-receipts that can be used to create or attach to expense entries.)
- The **New** task provides one or more additional options. The user hovers the mouse pointer over **New** to start a new report, new cash advance, new request, etc. The options that appear depend on the user's roles/permissions.



## MY TRIPS

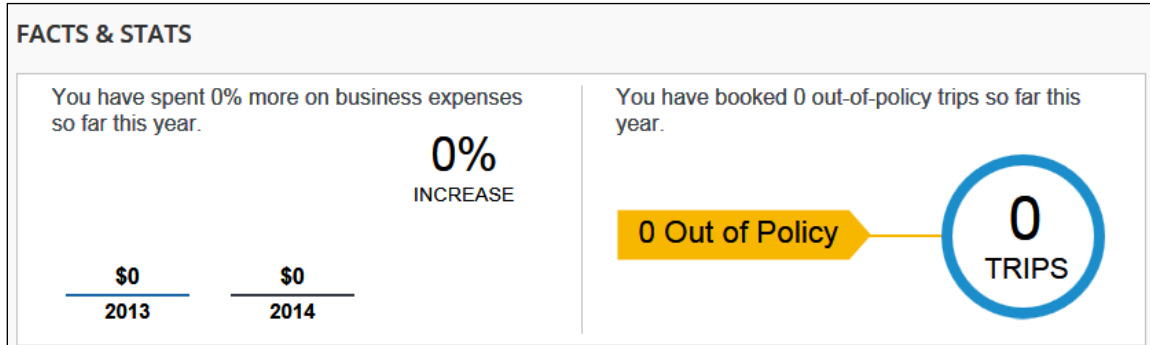
This section appears just below the **Trip Search** section.





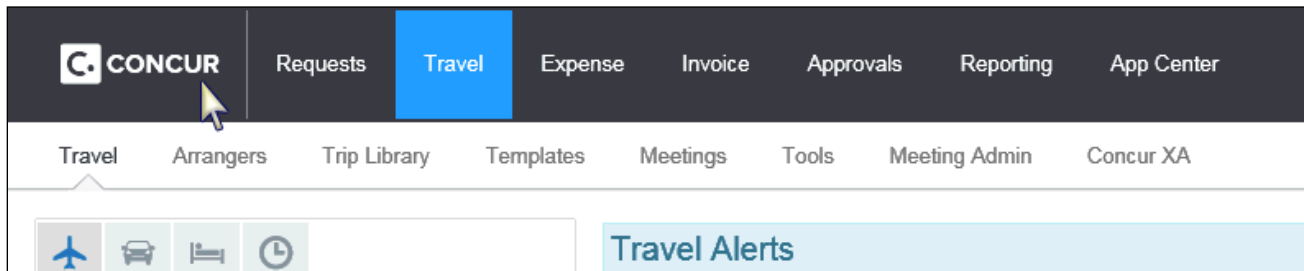
## FACTS & STATS

**THIS SECTION LETS YOU TRACK OF YOUR PERSONAL STATS AND READ HELPFUL HINTS.**

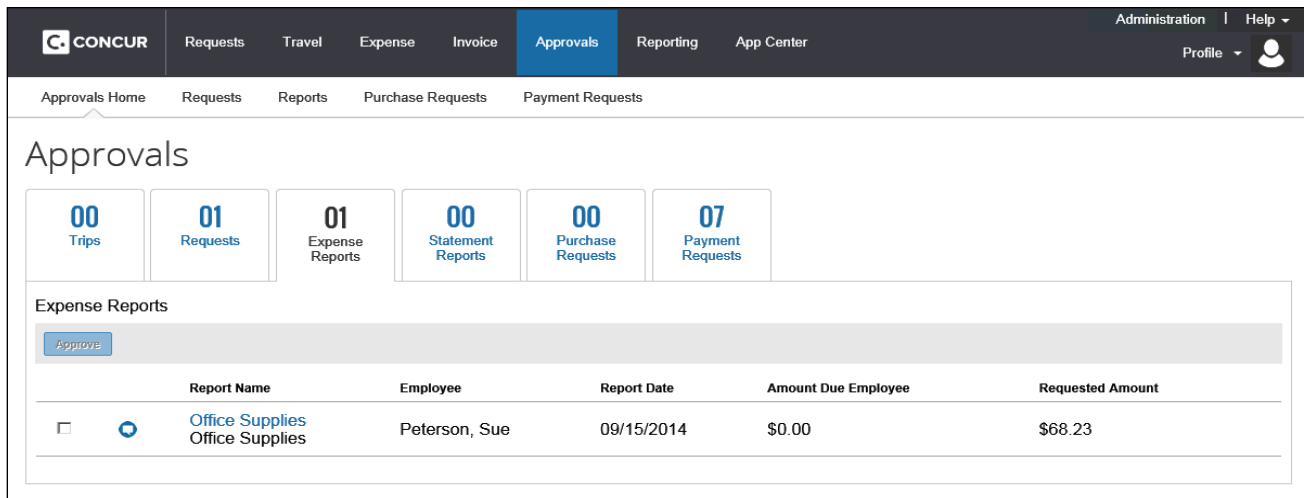


## RETURNING TO HOME

Once you leave the home page, the **Home** menu is replaced by the Concur logo. To return to the home page, click the logo.



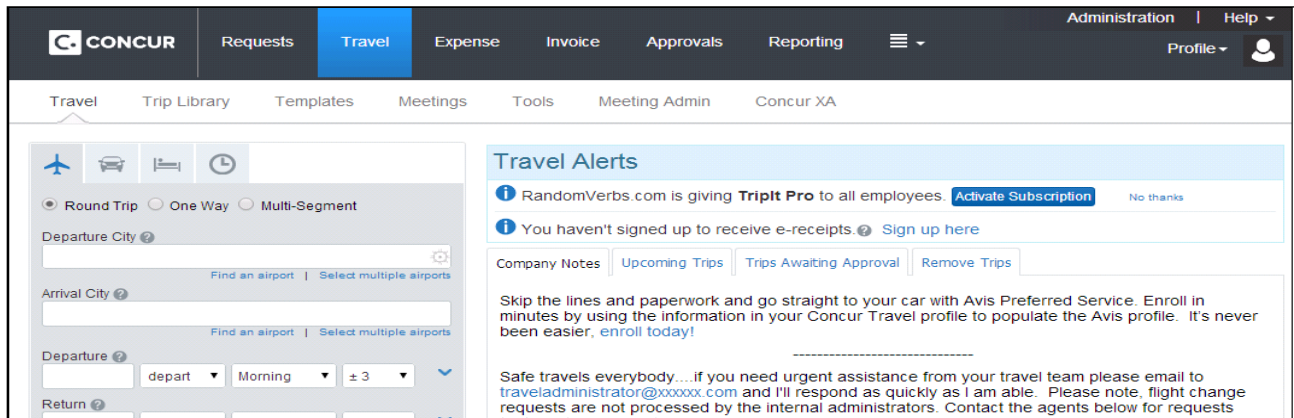
## Approvals Page – (if applicable)



The **Approvals** page is new. It contains all items that require the user's approval, such as trips, requests, reports, and cash advances. The user clicks a tab to quickly access each type of item that requires approval. The user clicks an individual item to open it. The user can click the check box for an item and click **Approve**, if the company configuration allows approval without opening. To access historical information, the user clicks the appropriate sub-menu option.

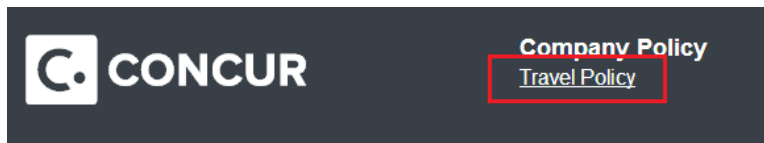


## Travel Page – Enhanced



For the most part, the enhancements involve look-and-feel, except:

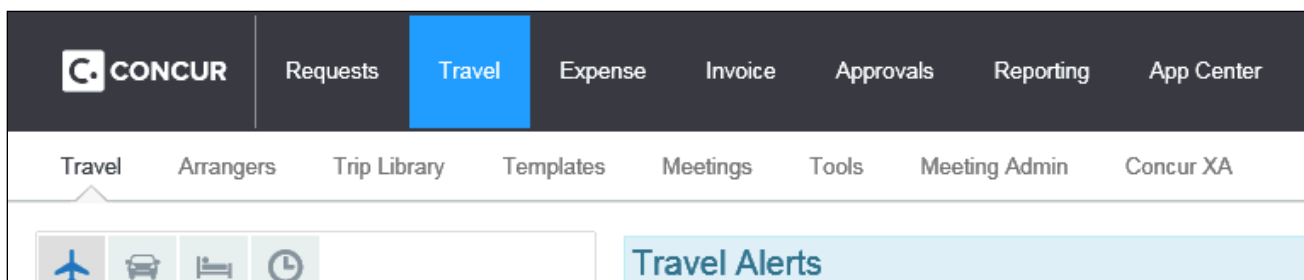
- **Travel Map:** The Travel Map has been removed.
- **Travel policy:** In the current UI, there was a menu option called *Travel Policy*. It highlights all the travel policy rules enabled for the user/arranger's travel class. In the enhanced UI, the link is in the footer:



## Menus

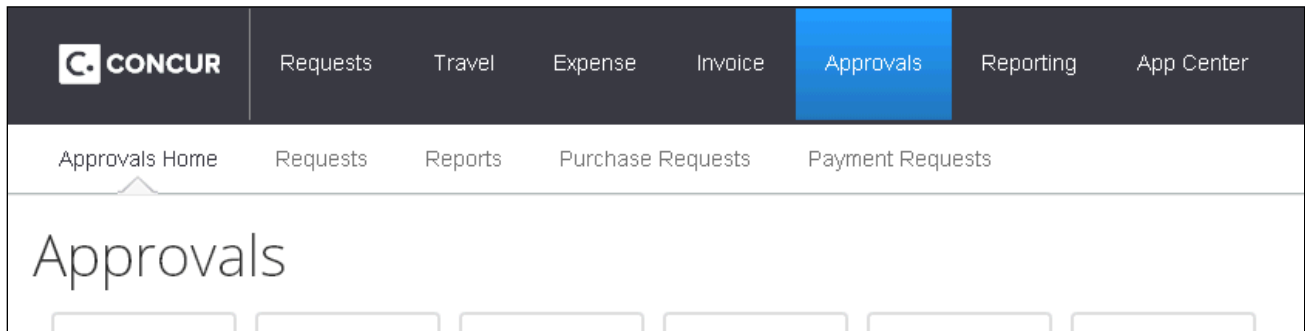
Here is a quick look at some of the menu options that have moved.

### TRAVEL MENU

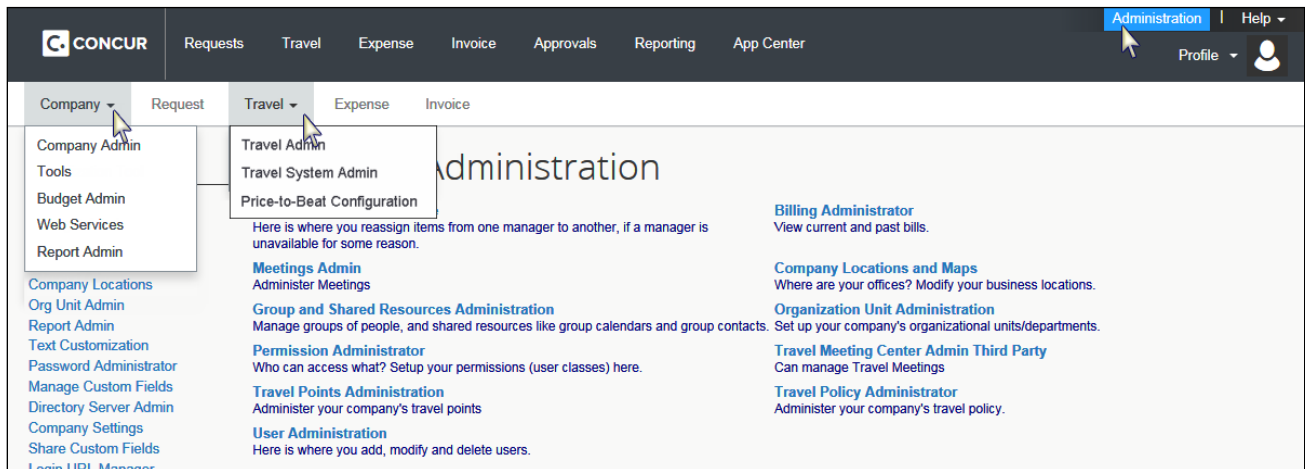




## APPROVALS MENU (IF APPLICABLE)



## ADMINISTRATION MENU

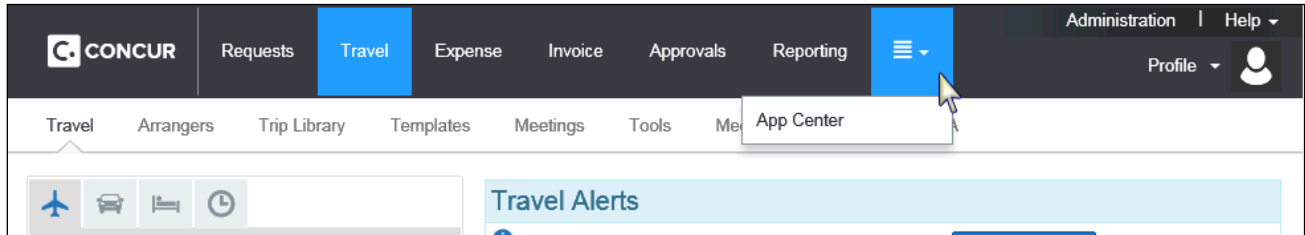


Some of the menus options have moved but the actual pages remain unchanged.

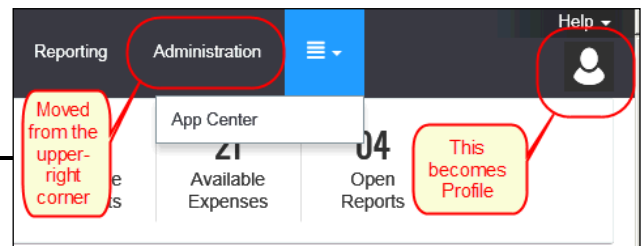
Current Administration menu option	Now available at...
Company Admin	Administration > Company > Company Admin
Report Admin	Administration > Company > Report Admin
Web Services	Administration > Company > Web Services
Price-to-Beat Configuration	Administration > Travel > Price-to-Beat Configuration
Request Admin	Administration > Request
Expense Admin	Administration > Expense
Expense Tools	Administration > Company > Tools
Invoice Admin	Administration > Invoice
Budget Admin	Administration > Company > Budget Admin
Travel System Admin	Administration > Travel > Travel System Admin

## Resizing – Responsive Design

If the width of the screen is reduced,  appears. Click to access the additional menu options.



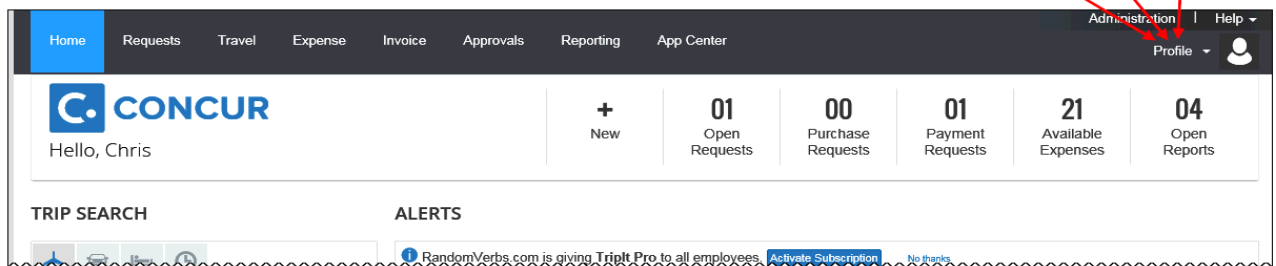
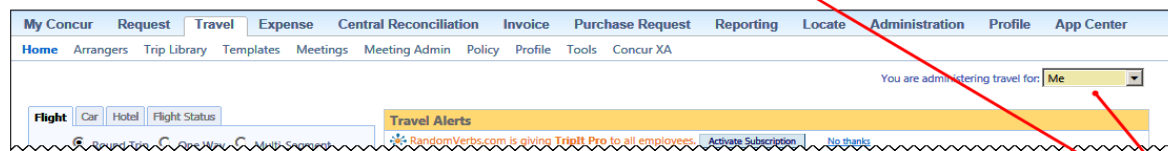
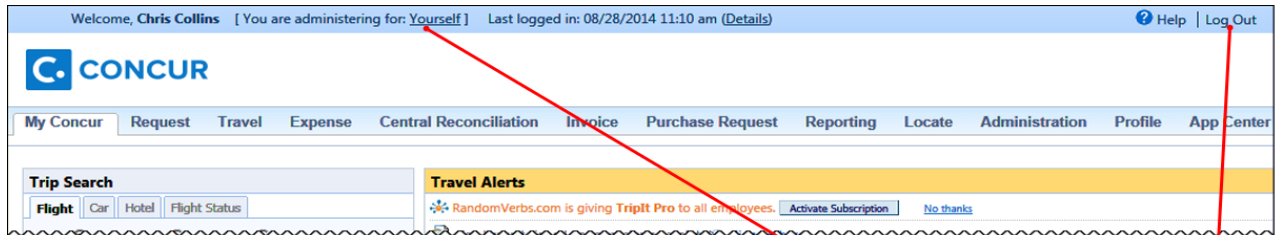
If the width is further reduced (for example, to display on a tablet) the **Administration** menu moves from the upper-right corner and the icon below **Help** becomes **Profile**.



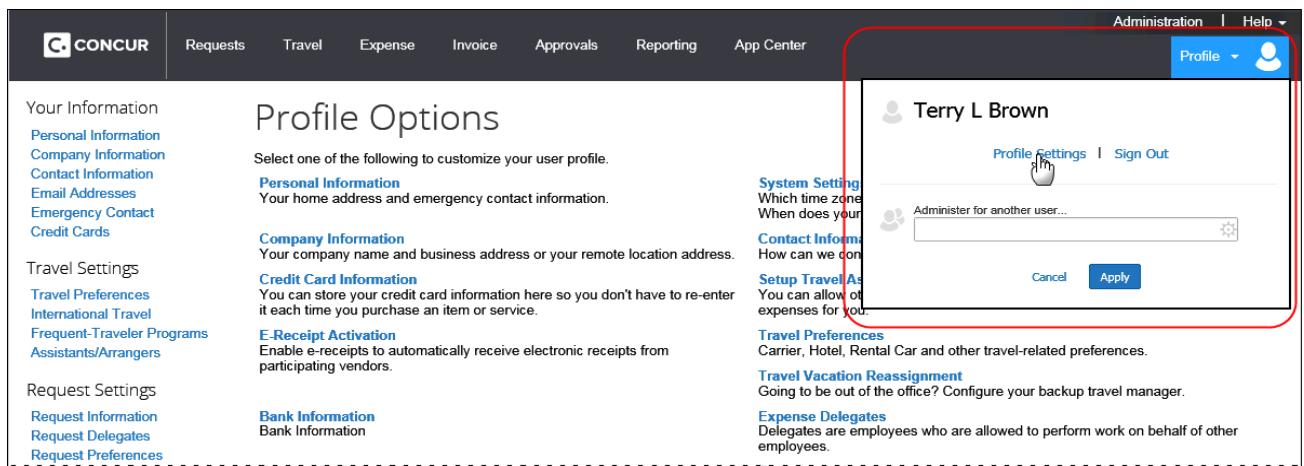


## Profile – Profile, Sign Out, Delegate, Proxy, Travel Assistant/Arranger

Profile settings, sign out, and administer for another user (for the delegate, proxy, travel assistant/arranger) have been moved to the **Profile** menu.



## Profile Menu



## Profile Settings

In the enhanced UI, the user clicks **Profile > Profile Settings**. The changes in the **Profile Options** page involve look-and-feel except Expense credit Card. Refer to *Additional Expense Pages* in this document.

## Sign Out (Log Out)

With the enhanced UI, users click **Profile > Sign Out**.

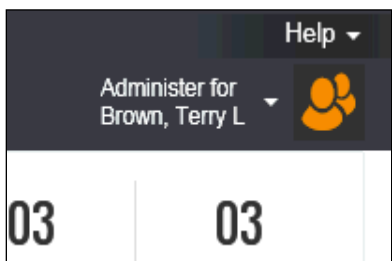
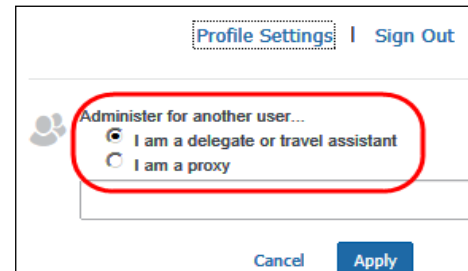
## Administer for Another User – Delegate, Proxy, Travel Assistant/Arranger

The delegate, proxy, or travel assistant/arranger uses **Profile** to select a user. He/She clicks **Profile**, selects the desired user, and clicks **Apply**.



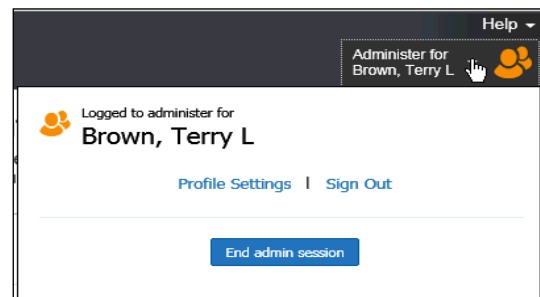
### NOTES:

- If the delegate has 10 or less users, then they appear in a drop list. If there are more than 10, then the user enters the first few letters of the desired user's name and selects from the search results.
- This section is used by delegates, proxies, and travel arrangers. If a user has more than one of these roles, the user selects the appropriate option.



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

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





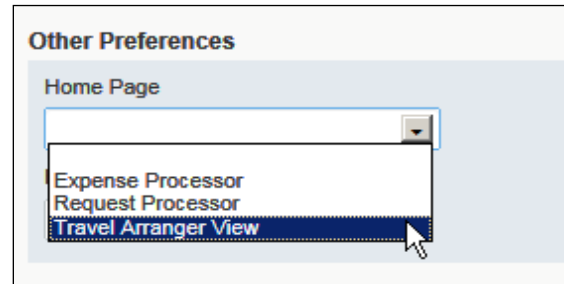
## Additional Travel Pages

Here are the other changes to Travel. Most enhancements involve look-and-feel.

### ARRANGER VIEW HOME PAGE

In the current UI, arrangers in Travel see the **Make this my homepage** link (top right) when viewing the Arranger home page. This has been removed in the enhanced UI.



Now, arrangers can elect to have the Arranger page as the home page via **Profile > Profile Settings > System Settings** (left menu). In the **Other Preferences** section, in the **Home Page** list, the arranger clicks *Travel Arranger View*.



### Search Results Pages

Change Flight Search, Filters, and Total Estimated Cost have moved from the right side of the search results page to the left side of the page.

All 31 results	Mini Car	Economy Car	Compact Car	Intermediate Car	Intermediate Car Hybrid	Standard Car	Standard Convertible	Full-size Car	Pr
<b>AVIS</b>	--	53.00	53.00	54.00	--	55.00	312.48	57.00	
<b>Hertz</b>	48.25	46.62	47.22	48.25	82.33	49.43	--	51.11	

Also note that – for air, car, hotel, and rail bookings – the **Reserve**  button now reads **Select** .



## Travel Review Pages – NEW

This is a new feature with the enhanced UI. This page allows the user/arranger to see, review, and change pertinent options about each segment. Here are a few samples:

- A review of the segments booked

### REVIEW RENTAL CAR

Avis Car Rental [Location details](#)

Type	Pick-up	Drop-off
Economy Car	Airport Terminal	Airport Terminal
<a href="#">Features</a>	ORD: Chicago	ORD: Chicago
	09:10 am Tue, 10/14/2014	02:00 pm Wed, 10/15/2014

- Preferences (comments previously called Message to Vendor)

### PROVIDE HOTEL ROOM PREFERENCES

Your preferences and comments will be passed to the hotel.

Comments (30 character max)

- Traveler information including name, contact information and frequent guest program details

### ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. ⓘ

**PRIMARY TRAVELER** [Edit](#) | [Review all](#)

**Name:** William Never **Phone:** 314-769-9055

Document Type  
 [View Details](#)

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**Frequent Flyer Programs**  
For American Airlines

- Seat Assignments for Air/Rail

### SEAT ASSIGNMENT

Make your trip more enjoyable by selecting your seats now. Otherwise, Concur will request them for you.



- Method of Payment

### SELECT A METHOD OF PAYMENT

How would you like to pay?

**Choose a credit card**

Mobile Test Card\* (...1111) [Add credit card](#)

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\* Indicates credit card is a company card

- Rules and Restrictions

### ACCEPT FARE RULES AND RESTRICTIONS

**NON-REFUNDABLE TICKET**

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only. Select these flights anyway?

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**RULE APPLICATION AND OTHER CONDITIONS**

NOTE - THE FOLLOWING TEXT IS INFORMATIONAL AND NOT VALIDATED FOR AUTOPRICING. EXCURSION FARES APPLICATION CLASS OF SERVICE THESE FARES APPLY FOR FIRST/BUSINESS/ECONOMY/COACH CLASS SERVICE. CAPACITY LIMITATIONS SEATS ARE LIMITED.

**ELIGIBILITY**

NO ELIGIBILITY REQUIREMENTS APPLY.

**DAY/TIME**

PERMITTED MON/TUE/WED/THU/SAT.

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\* I agree to the above fare rules and restrictions.