Concur User Experience Evolution
Transition Guide for York University Users
Introduction

Beginning January 31st, faculty and staff will notice a change to the Concur user interface ("UI"). The enhanced UI will modernize the experience with Concur and improve the usability of the tool.

Concur users should note the following important changes in the enhanced UI:

(i) redesigned home (formerly My Concur), expense, and approvals pages; and

(ii) changes in navigating to certain pages/tasks within the tool.

In addition, while the layout of the expense forms and most other pages in Concur remain unchanged, Concur users will notice a different look and feel with these areas.

This document provides additional information regarding the changes noted above in order to assist you with the transition to the enhanced UI. This document is designed for experienced Concur users that have attended training sessions conducted in the current UI.

Additional Training

For additional training on Concur Expense, refer to the following resources:

1. Community demonstrations of the enhanced UI. For upcoming sessions click here.
2. Comprehensive in-lab training courses available on the York Employee Learning Calendar include:
   - Concur Expense: Preparing an Expense Claim
   - Concur Expense: Reviewing/Approving an Expense Claim
3. On-line training materials can be accessed:
   - Using your Passport York account Click Here
   - Directly from Concur Expense by hovering over the "Help" icon and clicking “Training”
Changes to the Home, Expense and Approvals pages

The following summarizes the changes to the home, expense, and approvals pages.

**Concur Home Page – Fully Redesigned**

The homepage is the landing page when you log into Concur. 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.

The following summarizes the enhancements to the home page.

**QUICK TASK BAR**

The new Quick Task Bar gives you quick access to your most important tasks. It also includes the count of associated tasks. The tasks that appear depend on your roles/permissions. For example, if you are not set up to approve expense reports, you will not see a count of required approvals on your Quick Task Bar.

As shown below, this user has 2 required approvals, 4 available expenses, 1 open report, and 1 cash advance.

![Quick Task Bar Example]

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Page 2
• 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 4 available expenses. (**Available Expenses** is the new name for **Smart Expenses** such as quick expenses created with your mobile device)

• The **New** task provides one or more additional options. The user hovers the mouse pointer over **New** to start a new report, start a new cash advance, or upload a new receipt.

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**COMPANY NOTES**

The Company Notes (formerly known as Company Info) will appear below the Quick Task Bar. Company Notes will be condensed to a smaller section on the Concur home page. Click on the **Read More** link to view all the information contained in the Company Notes.

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**MY TASKS**

This section replaces the **Active Work** section on the **My Concur** page and is similar to the Quick Task Bar – it provides users quick access to the most important tasks.
**NOTE:**
If you only have a few required approvals, the reports or cash advance requests will appear individually. Click on the report or cash advance request name to access the specific report or cash advance request.

**FACTS & STATS**
This section lets you track 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.
Expense Page – Fully Redesigned

This page shows the active reports and available expenses and receipts. Historical reports can also be accessed from this page.

The following summarizes the enhancements to the expense page.

- **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.
- **All reports:** To the right of the tiles is the **All reports** link. The user clicks this link to see all reports – active, paid, etc.
- **New:** To create a new report, the user clicks **Create New Report**.
- **Available Expenses:** Available expenses (formerly known as Smart Expenses) appear next on the page. The user can add them to an expense report.
- **Available Receipts:** Available receipts (formerly known as the Receipt Store) appear at the bottom of the page. The user can attach them to an expense.
Approvals Page – NEW

The Approvals page is new. It contains all items that require the user's approval, such as expense reports and cash advances. Click a tab to quickly access each type of item that requires approval. Click an individual item to open it.
Menus
To access other information, click the appropriate sub-menu option.

Expense Menu

![Expense Menu Image]

Approvals Menu

![Approvals Menu Image]

Resizing – Responsive Design
If the width of the screen is reduced,amburger menu appears. Click to access the additional menu options.
Profile – Accessing Profile Options, Acting as a Delegate, and Sign Out

Profile settings, sign out, and the delegate function have been moved to the Profile menu on the right of your screen.
**Profile Menu**

Click Profile to access these functions.

**Profile Settings**

In the enhanced UI, click Profile > Profile Settings to access the Profile Options page. The Profile Options page remains the same. Only the look and feel has changed in the enhanced UI.
**Acting as a Delegate (i.e. Administer for Another User)**

In the enhanced UI, delegates access the delegate function from the **Profile** menu. To act as a delegate, click **Profile**. In the “Administer for another user...” box, select the desired user as follows:

- If you act as a delegate for 10 or less users, then select another user from the drop list.
- If you act as a delegate for more than 10 users, then enter the first few letters of the desired users name and select from the search results.

Click **Apply** when done.

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

To return to working for yourself, click **Administer for <name>** and then click **End admin session**.

**Sign Out (Log Out)**

To sign out click **Profile > Sign Out**.
Additional Expense Pages

**Attendees Table within an Expense**

In the enhanced UI:
- The buttons above the attendee names have been rearranged.
- As the browser size is reduced, the attendee button bar can now collapse from both the right and the left side to compensate.

**Compatible browsers**

With the rollout of enhanced UI, Concur will no longer support Internet Explorer 7 (IE 7). If you currently use IE 7 at home or at work to access Concur, please update your browser. Below is a list of the supported browser and operating system configurations for Concur Expense.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Desktop Operating System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firefox 31.0, 32.0, &amp; 33.0</td>
<td>Windows 8.1, Windows 7 (SP1), Windows Vista (SP2), Windows XP Professional (SP3), Mac OS X 10.4 or later</td>
</tr>
<tr>
<td>Google Chrome 36.0, 37.0, &amp; 38.0</td>
<td>Windows 8.1, Windows 7 (SP1), Windows Vista (SP2), Windows XP Professional (SP3), Mac OS X 10.x or later</td>
</tr>
<tr>
<td>Internet Explorer 11.0</td>
<td>Windows 8.1, Windows 7 (SP1), Windows 8</td>
</tr>
<tr>
<td>Internet Explorer 10.0</td>
<td>Windows 7 (SP1), Windows 8</td>
</tr>
<tr>
<td>Internet Explorer 9.0</td>
<td>Windows 7 (SP1), Windows Vista (SP2)</td>
</tr>
<tr>
<td>Internet Explorer 8.0</td>
<td>Windows 7 (SP1), Windows Vista (SP2), Windows XP Professional (SP3)</td>
</tr>
<tr>
<td>Safari 6.0 &amp; 7.0</td>
<td>Mac OS X version 10.8 or later</td>
</tr>
<tr>
<td>Safari 5.1 &amp; 5.0.5</td>
<td>Mac OS X version 10.5 or later</td>
</tr>
</tbody>
</table>

For assistance updating your browser on a University supported device, please contact Client Services (UIT) at ithelp@yorku.ca or at (416)736-5800.