



# **Concur User Experience Evolution**

## **Transition Guide for York University Users**



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## 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.

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## Additional Training

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

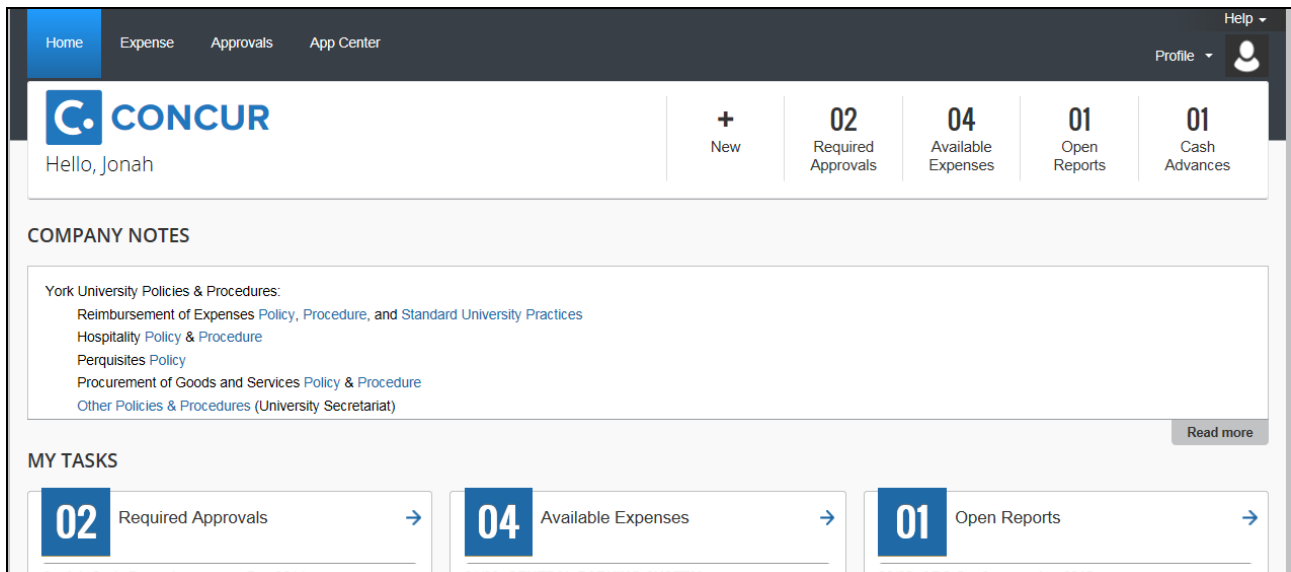
1. Community demonstrations of the enhanced UI. For upcoming sessions [click here](#).
2. Comprehensive in-lab training courses available on the [York Employee Learning Calendar](#) include:
  - Concur Expense: Preparing an Expense Claim
  - Concur Expense: Reviewing/Approving an Expense Claim
3. On-line 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.

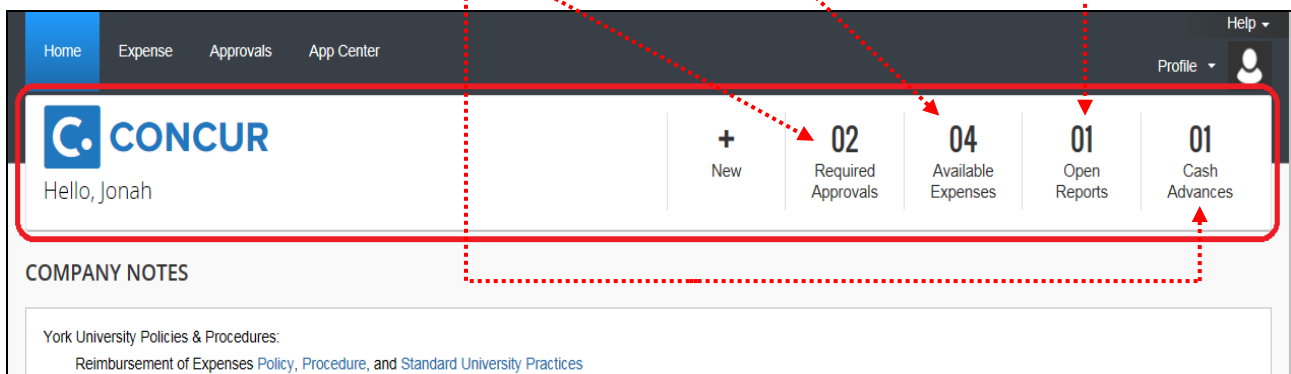


The following summarizes the enhancements to the home page.

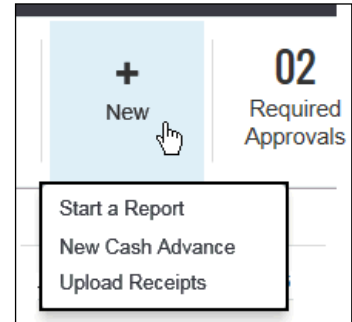
### QUICK TASK BAR

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.

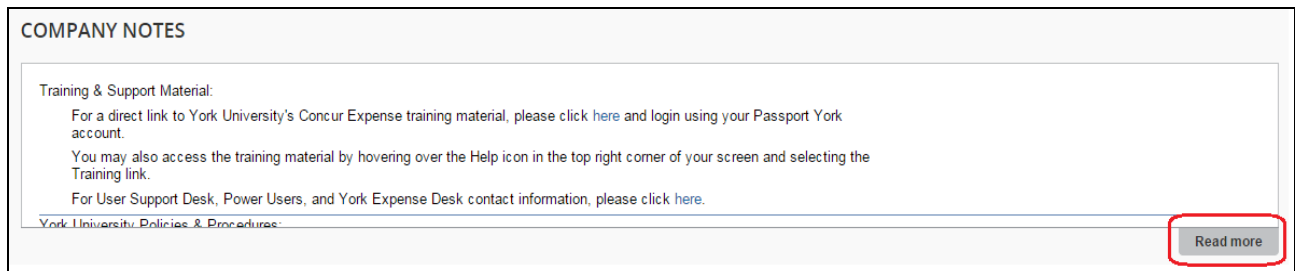


- The user clicks a task for quick access to the associated page. For example, when the user clicks the **Open Reports** task, the page listing the user's expense reports appears.
- The user also has 4 available expenses. (*Available Expenses* is the new name for *Smart Expenses* such as quick expenses 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.



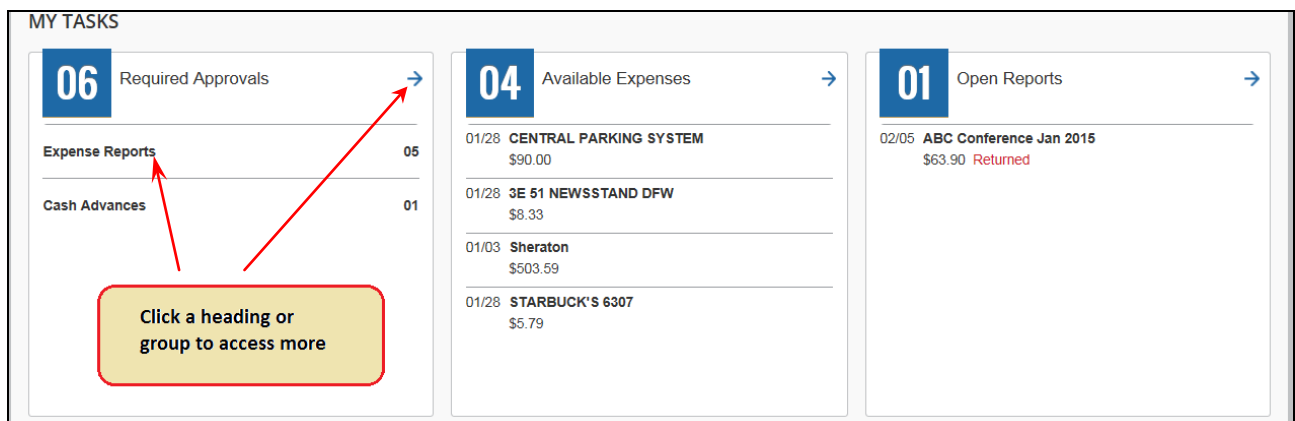
## COMPANY NOTES

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.



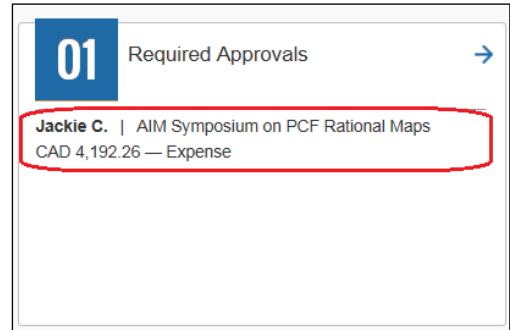
## MY TASKS

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.



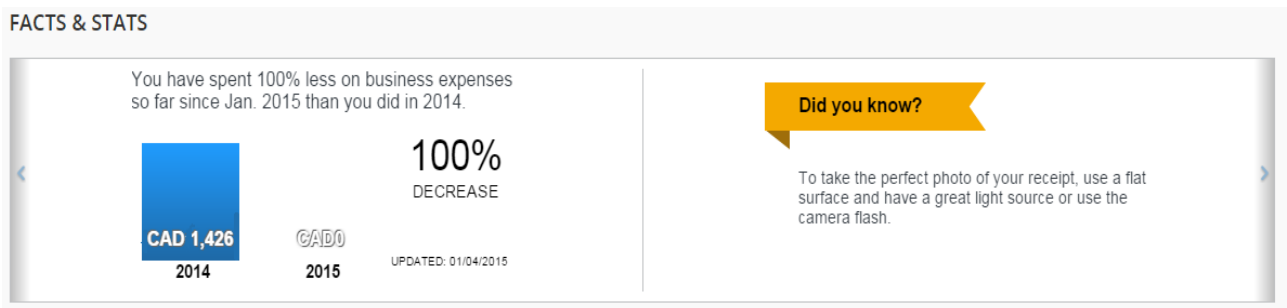
## NOTE:

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.



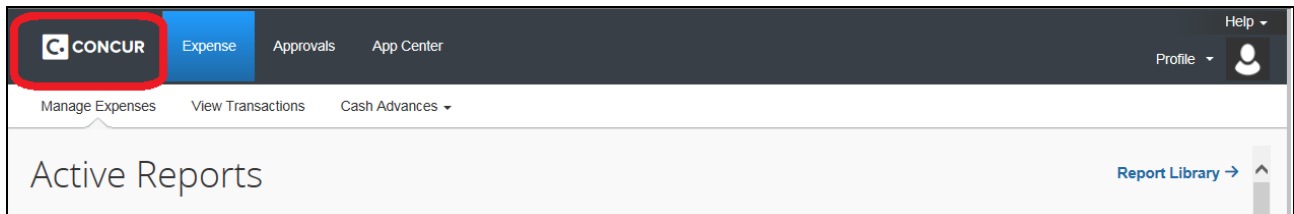
## FACTS & STATS

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 screenshot displays the Concur Expense Page interface. At the top, there is a navigation bar with the Concur logo, 'Expense' (selected), 'Approvals', and 'App Center'. On the right, there are links for 'Help', 'Profile', and a user icon. Below the navigation bar, there are tabs for 'Manage Expenses', 'View Transactions', and 'Cash Advances'. The main content area is divided into three sections:

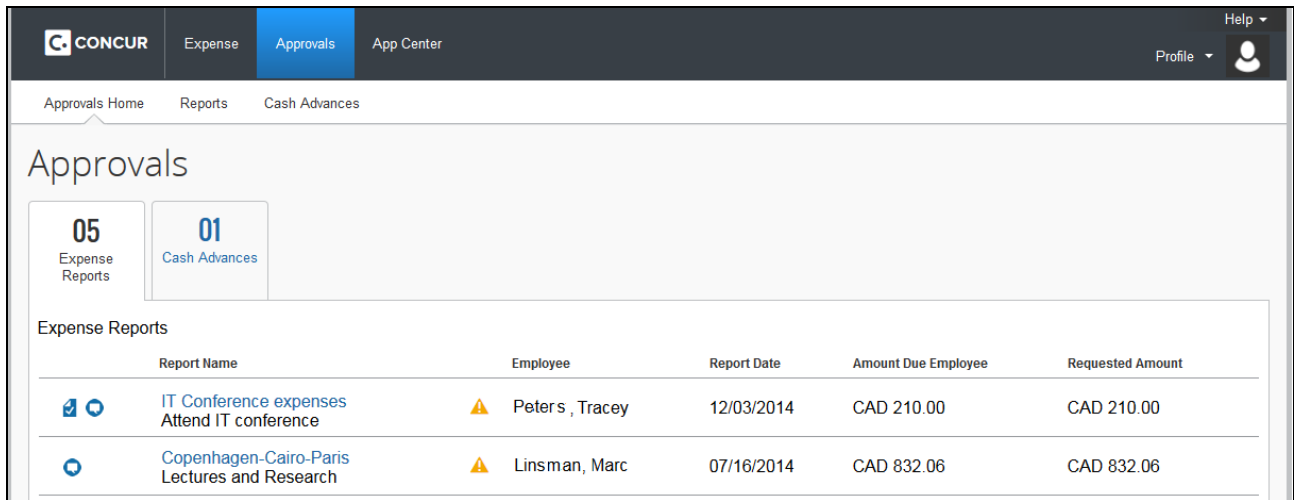
- Active Reports:** This section features a 'Create New Report' button (indicated by a dashed orange box) and three report tiles. The first tile, 'Trip to France', is marked 'RETURNED' on 02/26/2014 with an amount of \$1,119.00. The second tile, 'Public Transport', is marked 'NOT SUBMITTED' with an amount of \$1,432.82. The third tile, 'Office Supplies', is also marked 'NOT SUBMITTED' with an amount of \$200.00. An 'All reports' link is located to the right of the tiles.
- Available Expenses:** This section shows a table of expenses. A 'Move' button is visible in the top right of the table area. The table has columns for 'Expense Detail', 'Expense', 'Source', 'Date', and 'Amount'. One row is visible: 'Office Warehouse Seatt...' with an amount of \$68.23.
- Available Receipts:** This section features an 'Upload New Receipt' button (indicated by a dashed red box) and two receipt thumbnails. The first thumbnail is for 'Toronto-New Orleans (Fusion).pdf' and the second is for 'W sheraton.pdf'. Each thumbnail has a 'Delete' button in the top right corner.

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.



The screenshot displays the Concur Approvals page. At the top, there is a navigation bar with the Concur logo and tabs for Expense, Approvals (selected), and App Center. A user profile icon and a Help dropdown are visible in the top right. Below the navigation bar, there are sub-tabs for Approvals Home, Reports, and Cash Advances. The main heading is "Approvals". Two summary cards are shown: "05 Expense Reports" and "01 Cash Advances". Below these, a section titled "Expense Reports" contains a table with the following data:

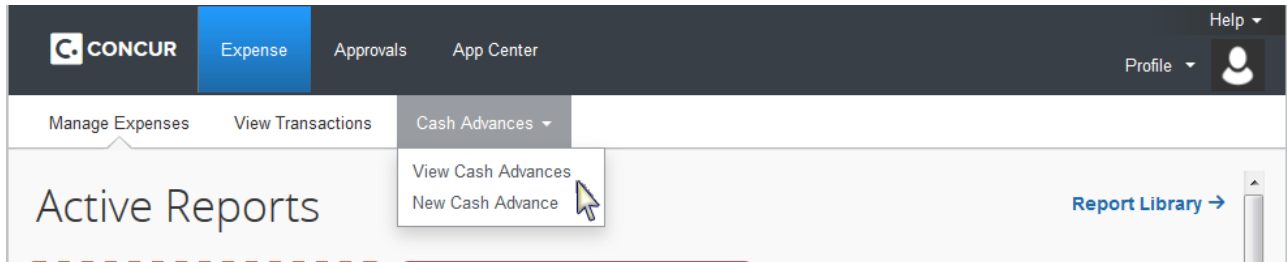
Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
 IT Conference expenses Attend IT conference	 Peters, Tracey	12/03/2014	CAD 210.00	CAD 210.00
 Copenhagen-Cairo-Paris Lectures and Research	 Linsman, Marc	07/16/2014	CAD 832.06	CAD 832.06

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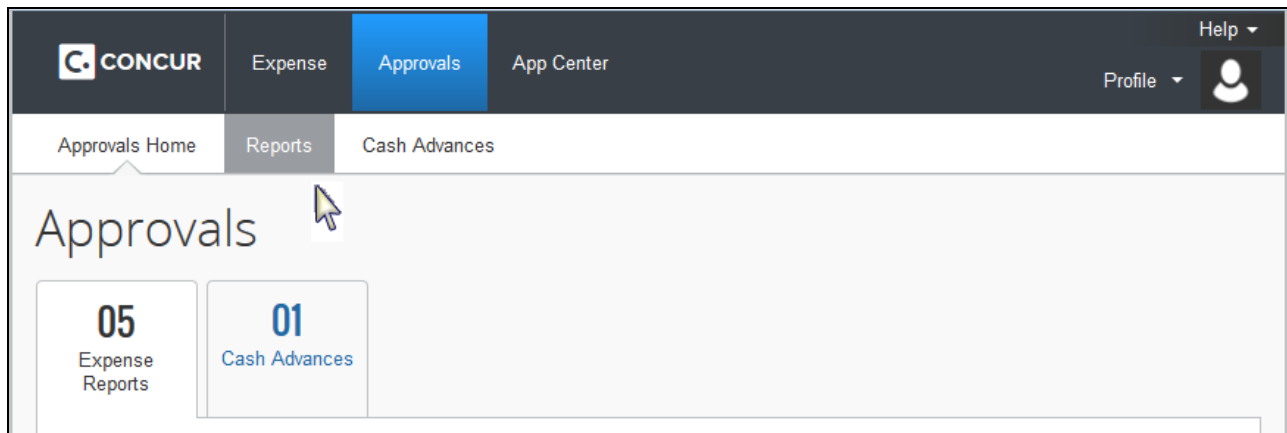
## Menus

To access other information, click the appropriate sub-menu option.


### EXPENSE MENU



### APPROVALS MENU



### Resizing – Responsive Design

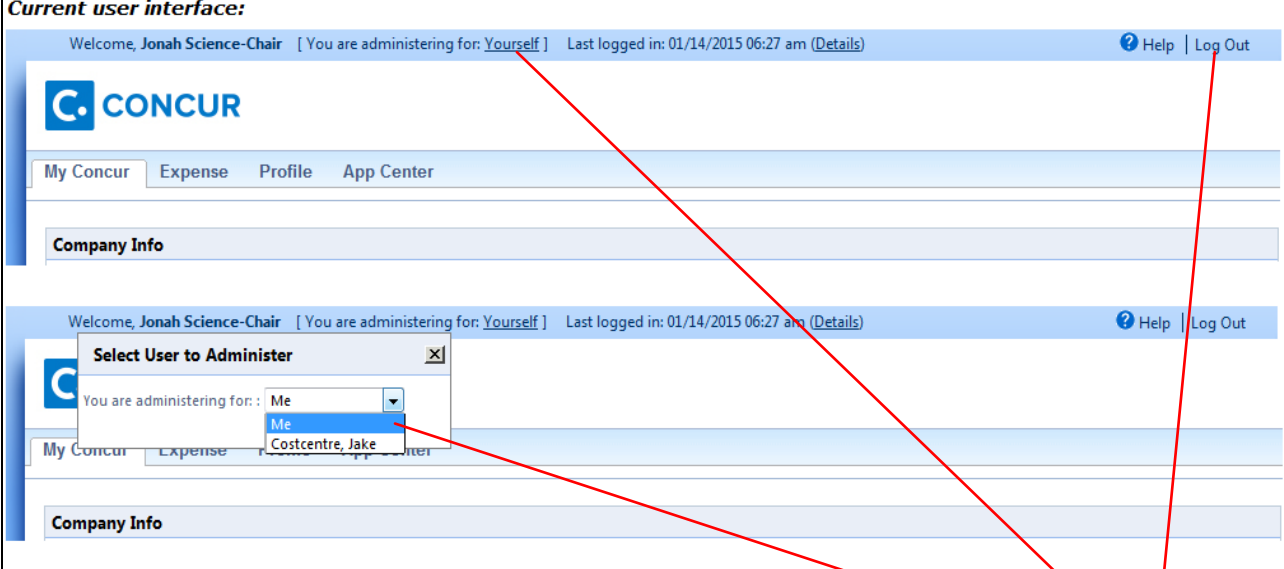
If the width of the screen is reduced,  appears. Click to access the additional menu options.



# Profile – Accessing Profile Options, Acting as a Delegate, and Sign Out

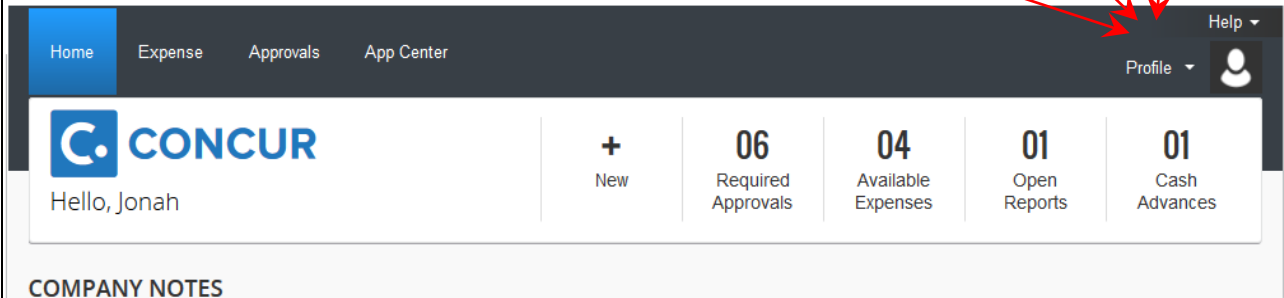
Profile settings, sign out, and the delegate function have been moved to the **Profile** menu on the right of your screen.

**Current user interface:**



The current user interface shows a top navigation bar with the Concur logo and tabs for 'My Concur', 'Expense', 'Profile', and 'App Center'. A 'Company Info' section is visible below. A 'Select User to Administer' dialog box is open, showing a dropdown menu with 'Me' selected and 'Costcentre, Jake' as an option. Red arrows point from the 'You are administering for: Yourself' text in the top bar and the 'Me' option in the dialog box to the 'Profile' menu in the enhanced interface below.

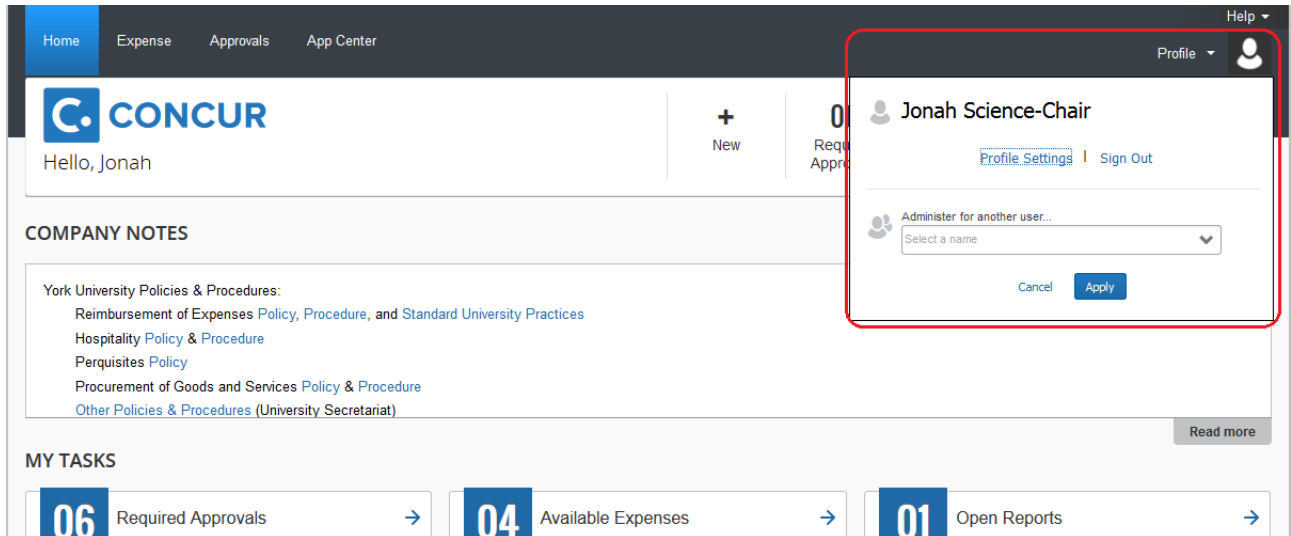
**Enhanced user interface:**



The enhanced user interface features a dark navigation bar with tabs for 'Home', 'Expense', 'Approvals', and 'App Center'. On the right side of the navigation bar, there is a 'Profile' menu and a user profile icon. Below the navigation bar, the Concur logo is displayed along with a greeting 'Hello, Jonah'. A dashboard area shows five metrics: '+ New', '06 Required Approvals', '04 Available Expenses', '01 Open Reports', and '01 Cash Advances'. A 'COMPANY NOTES' section is visible at the bottom.

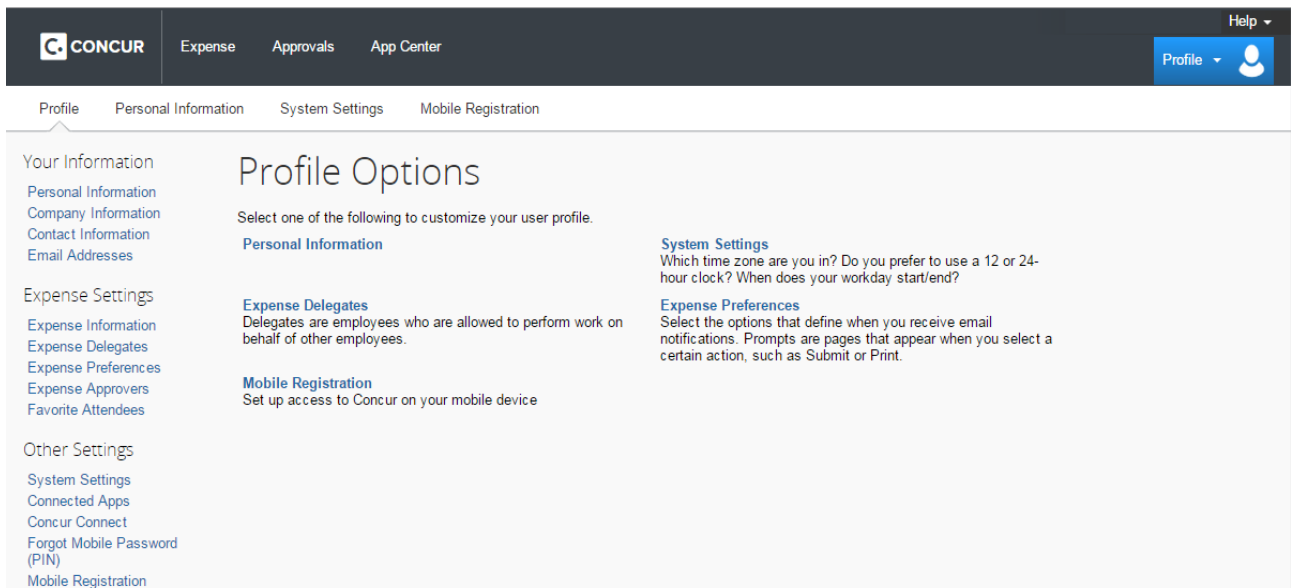
## Profile Menu

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)

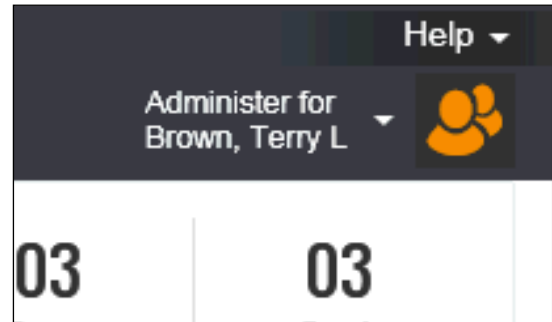
In the enhanced UI, delegates access the delegate function from the **Profile** menu. To act as a delegate, click **Profile**. In the “**Administer for another user...**” box, select the desired user as follows:

- 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.

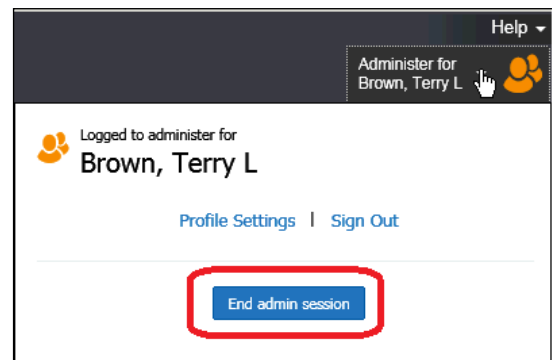


Click **Apply** when done.

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

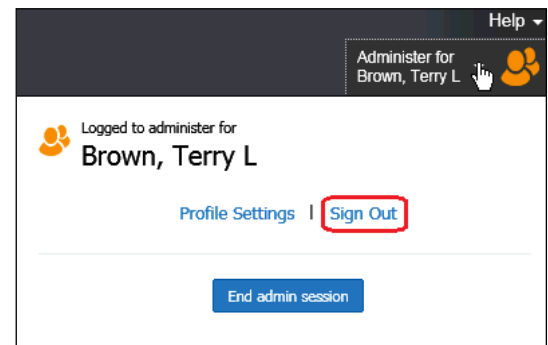


To return to working for yourself, click **Administer for <name>** and then click **End admin session**.



## Sign Out (Log Out)

To sign out click **Profile > Sign Out**.



## Additional Expense Pages

### Attendees Table within an Expense

**Attendees**      Attendees: 1 | Attendee Total: \$0.00 | Remaining: \$0.00 | No Shows: 0 \$0.00

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Attendee Count	Amount
<input type="checkbox"/>	Brown, Terry			This Employee	1	\$0.00

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.

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

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