

NextGen UI for Concur Expense: Administrators

Transition Guide – Professional Edition

Last Revised: January 7, 2021

Applies to:

- Professional/Premium edition
 - Expense
 - Travel
 - Request
 - Invoice

- Standard edition
 - Expense
 - Travel
 - Request
 - Invoice

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Revision History

| Date | Revision Notes/Comments |
|-------------------|--|
| January 7, 2021 | Added the <i>Report Key in Report Header</i> section. |
| September 4, 2020 | Added the <i>Audit Rule Enhancement for Travel Diary</i> section. |
| July 2, 2020 | Clarifications made in the <i>Enablement Considerations</i> section. |
| July 1, 2020 | Made the following updates: <ul style="list-style-type: none"> Added the <i>Enablement Considerations</i> section. |
| June 10, 2020 | Made the following updates: <ul style="list-style-type: none"> Updated the information about new customers in the <i>Phased Approach Section</i>. Updated and renamed the <i>Using the Preview NextGen UI Page</i> section to <i>Using the User Experience Settings Page</i>. The Preview NextGen Expense page was renamed and combined with the page used to enable the NextGen UI for Concur Expense. The page now enables the NextGen UI for both Concur Expense and Concur Request. Updated the <i>Early Access / Opt-In / Mandatory Move</i> section Replaced term "NextGen Expense" with "NextGen UI" or "the NextGen UI for Concur Expense" for accurate product branding. Added the <i>Configuring Attendee Search for Attendee Types</i> section. Replaced term "NextGen Expense" with "NextGen UI" or "the NextGen UI for Concur Expense" for accurate product branding. |
| February 13, 2020 | Updated the copyright; no other changes; cover date not updated |
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| June 18, 2018 | Added additional information about "Fully Allocated" allocation audit rules |
| April 9, 2018 | Added: <ul style="list-style-type: none"> Clarification when previewing for yourself Additional examples in the <i>IMPORTANT: Considerations Before Transitioning</i> section |
| March 14, 2018 | Added the following: <ul style="list-style-type: none"> Pending Card Transaction payment type (appendix) General changes throughout |
| March 7, 2018 | Initial publication |

NextGen UI for Concur Expense – Administrator Guide

Section 1: About This Guide

The NextGen UI for Concur Expense provides updates and enhancements for Concur Expense end users. For information about the changes Concur Expense end users will see, refer to the end-user transition guide.

This administrator guide describes how an admin can enable the NextGen UI for Concur Expense for themselves, for one or more individual users, for an employee group, or for the whole company.

Section 2: Phased Approach

Concur Expense has many complex, robust features making it the most comprehensive feature set and the best expense-management tool to meet the diverse needs and expectations of our customers. Though SAP will eventually bring all of these features from the existing UI into the NextGen UI for Concur Expense – not all will be available immediately. SAP will introduce the major features initially and then bring in the remainder over time.

Starting July 1, 2020, all new customers will be implemented on the NextGen UI for Concur Expense.

For existing clients, once the feature set in the NextGen UI matches a client's configuration, the client can transition to the NextGen UI. For customers with more complicated configurations, their transition may be toward the end of the process.

Section 3: Early Access / Opt In / Mandatory Move

Schedule

- **Early Access** – The Early Access period for existing customers began in March 2018 and ended June 2020. This period allowed Concur Expense admins the opportunity to explore the NextGen UI for Concur Expense, review the documentation about features that are not yet available, and determine if early activation is right for their company.
- **Opt-In period for NextGen UI** – The opt-in for existing customers begins after the Early Access period on July 1, 2020. During this period, admins can turn on or off the NextGen UI by individual user, by group, or by their entire organization as often as desired during this period.

Customers should use this period to plan their transactions and move to the NextGen UI for Concur Expense when it is right for your business priorities.

Some remaining features will become available throughout this period so customers should plan their roll out accordingly.

NOTE: During the Opt-In Period for NextGen UI, not all planned Concur Expense features from the existing UI will be available in the NextGen UI.

- **Mandatory Move to the NextGen UI for customers of Concur Expense:** *All customers will be required to move to the NextGen UI.* This ensures that SAP continues to offer a consistent user experience for all customers and allows for superior product innovation and support. We have not yet set a date when any remaining customers will be moved automatically. Customers will have at least twelve months to complete the transition after the date is announced.

Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization, and then transition during the Opt-In Period for NextGen UI.

Preview Options

There are several options available for admins to become familiar with the NextGen UI and to introduce it in the company:

- **By admin:** The admin can turn on the NextGen UI – for themselves – whenever desired. Only that particular admin sees the NextGen UI; no other users are impacted. This way, the admin can learn about the changes before enabling the NextGen UI for other users.
- **By selected users:** The admin can turn on the NextGen UI for selected individual users, for example, a selected set of admin assistants or power users. These users will likely act as a resource to help others during the transition.
- **By groups:** The admin can turn on the NextGen UI for selected groups of users. This allows deployment of the NextGen UI by division or region immediately and also allows the company to gradually rollout the NextGen UI.
- **For the entire company:** The admin can turn on the NextGen UI for all users.


Section 4: Using the User Experience Settings Page

The following pages describe who can access the **User Experience Settings** page for previewing the NextGen UI, and how it works.

Enablement Considerations for Companies Using Both Concur Expense and Concur Request

Please read the enablement section that applies to the timeframe in which you enabled or plan to enable the NextGen UI for your company.

The outcome is based on whether users were configured for the NextGen UI at the moment of transition on July 2, 2020. If you had previously enabled users and subsequently returned them to the current UI prior to July 2, 2020, this would not be considered as enabled for the NextGen UI at the transition point.

 For more information about enabling the NextGen UI for Concur Request, refer to the *NextGen UI for Concur Request: Administrators Transition Guide*.

Enabled NextGen UI Before July 2, 2020 (Early Access)

If the NextGen UI was enabled for either Concur Expense or Concur Request before July 2, 2020, there are no changes to how the NextGen UI is enabled for Concur Expense or Concur Request. If you want to activate the NextGen UI for Concur Request, you can still do so from the **User Experience Settings** page (**Administration > Request > User Experiences Settings**). This NextGen UI enablement scenario is referred to as the "hybrid model" and was available during the Early Access period.

Customers in this model will receive additional information directly from SAP on how to move to the Opt-In model.

Enable NextGen UI on July 2, 2020 or Later (Opt In)

This section of the guide only applies if the NextGen UI was enabled for an entity on July 2, 2020 or later, or if your entity was transitioned by SAP sometime after July 2, 2020. This enablement scenario is referred to as the "unified model" and is available during the Opt-In period.

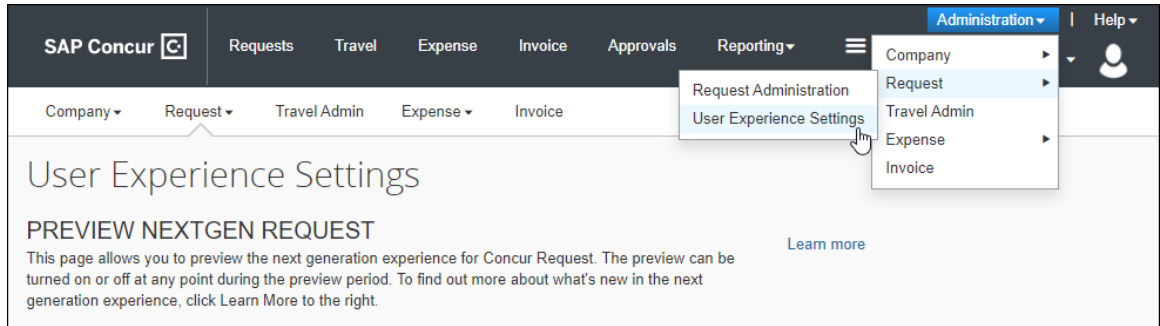
If you enable the NextGen UI for your entity, the NextGen UI will be enabled for both Concur Expense and Concur Request. If you only have Concur Expense or Concur Request, the NextGen UI will only be enabled for the product you have.

How can I tell Where the NextGen UI for Concur Request is Enabled?

If the Concur Request admin can see the **User Experience Settings** menu selection on the **Administration > Request** menu, then the NextGen UI for Concur Request is enabled from the **Administration > Request** menu, and your entity is currently using the hybrid model.

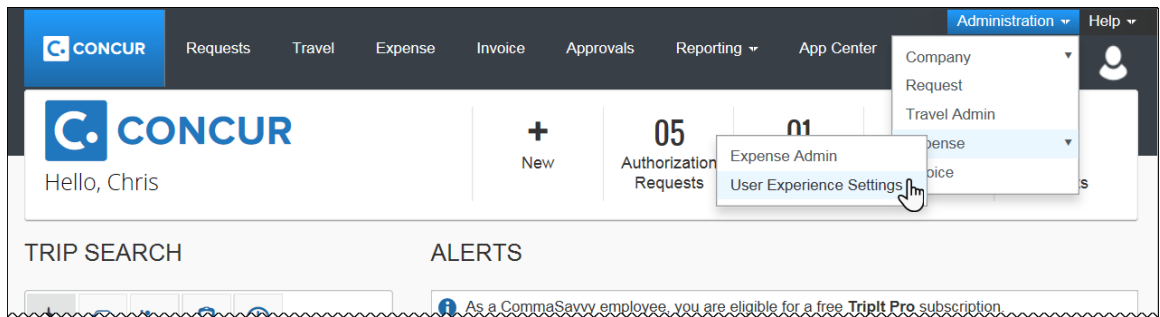
If the admin does not see the **Administration > Request > User Experience Settings** menu selection, the NextGen UI for Concur Request is enabled with Concur Expense using the **Administration > Expense > User Experience Settings** menu, and your entity is currently using the unified model.

The following is an example of the **Administration > Request > User Experience Settings** page.



Enabling the NextGen UI

Administrators (with the proper roles; described below) can access this page by clicking **Administration > Expense > User Experience Settings**.



The **User Experience Settings** page appears.

NOTE: The Expense **User Experience Settings** page indicates that the NextGen UI preview is for both Concur Expense and Concur Request. However, when you are using the hybrid model, this page only enables the NextGen UI for Concur Expense.

User Experience Settings

PREVIEW NEXTGEN UI FOR CONCUR EXPENSE AND CONCUR REQUEST

[Learn more](#)

This page allows you to preview the NextGen UI for Concur Expense and Concur Request. The preview can be turned on or off at any point during the preview period. To find out more about what's new in the NextGen UI, click Learn More to the right.

Preview for yourself

To check out the NextGen UI for yourself only, click the button below. You can return here to revert back to your current experience.

[Preview it for yourself](#)

Preview for users and groups

To select specific users and groups within the company to preview the NextGen UI, click the links below.

[Select individual users to switch to the NextGen UI](#)

[Select employee groups to switch to the NextGen UI](#)

Company-wide preview

IMPORTANT - This turns on the preview for every Expense and Request user in the entire company. We recommend making sure any user-facing information, such as Company Notes, is up-to-date before turning on the preview for everyone. If there is more than one Expense administrator, please coordinate to ensure that appropriate change management is in place for your users before you make the switch.

[Turn on the NextGen UI](#)

Preview for yourself

PREVIEW NEXTGEN UI FOR CONCUR EXPENSE AND CONCUR REQUEST

This page allows you to preview the NextGen UI for Concur Expense and Concur Request. The preview can be turned on or off at any point during the preview period. To find out more about what's new in the NextGen UI, click Learn More to the right.

Preview for yourself

To check out the NextGen UI for yourself only, click the button below. You can return here to revert back to your current experience.

[Preview it for yourself](#)

WHO CAN USE THIS SECTION OF THE PAGE?

This section of the page appears if the admin has either of these roles:

- Expense Configuration Administrator
- Expense Configuration Administrator (Restricted)

WHY DOES THE ADMIN USE THIS SECTION OF THE PAGE?

The admin uses this section of the page to turn on/off the NextGen UI for themselves.

HOW DOES IT WORK?

The admin clicks the **Preview it for yourself** button. When the admin uses Concur Expense, it appears in the NextGen UI. The same UI will be shown whether the admin is acting for themselves or for other users in the role of proxy or delegate.

The **Preview it for yourself** button then changes to **Revert to prior experience**. Any time during the review period, the admin can return to the **User Experience Settings** page and click the **Revert to prior experience** button to return to the existing UI.

NOTE: The Expense Administrator may need to log out and then log in again before a change to this setting is shown. Different browser and operating system combinations show different behavior for clearing the local session to accept this change, therefore, logging out and back in is always recommended.

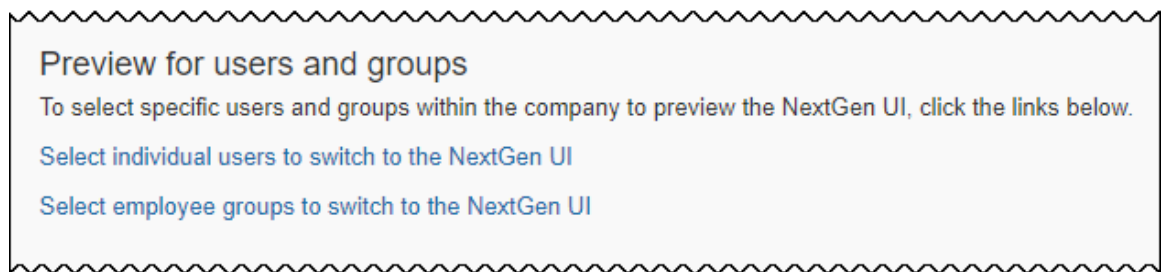
IMPORTANT: SWITCHING BETWEEN THE NEXTGEN UI AND THE EXISTING UI

The admin can switch between the two interfaces using **Preview it for yourself** and **Revert to prior experience** until:

- The admin's group has been switched to the NextGen UI.
 - or –
- The entire company has been switched to the NextGen UI.

When either of these events occur, the admin can no longer access the existing UI.

Preview for users and groups



There are two links in the section.

LINK: SELECT INDIVIDUAL USERS TO SWITCH TO THE NEXTGEN UI

Who can use this link?

This link appears if the admin currently has these roles:

- Expense Configuration Administrator **plus** User Permissions
- Expense Configuration Administrator (Restricted) **plus** User Permissions

Why does the admin use this link?

The admin uses this link to assign the NextGen UI preview role, Expense UI Preview, to individual users.

How does it work?

The admin clicks the **Select individual users to switch to the NextGen UI** link. The **User Permission** page (**Administration > Company > Company Admin > User Permissions**) appears.

The screenshot shows the 'User Permissions' page in SAP Concur. At the top, there are navigation tabs: 'Travel', 'Expense', 'Request', 'Invoice', 'Reporting', and 'Supplier Portal'. The 'Expense' tab is highlighted with a red circle. Below the tabs are 'Save' and 'Cancel' buttons. The main area is divided into three steps: 'Step1. Modify Roles By:' with a dropdown for 'User Name'; 'Step2. Search Text:' with a text input field; and 'Search What:' with a dropdown for 'Name, Email, Log-in' and a 'Search' button. Below these are 'Step3. User Name to Assign Roles:' with a dropdown for 'Select One ..' and 'Show Users in Only This Employee Group Configuration:' with a dropdown for 'All Users I Can Access'. The 'Roles' section is at the bottom, with 'Available Roles' and 'Roles for this User' tabs. The 'Available Roles' tab is active, showing a table with columns for 'Role' and 'Gr'.

To assign the role to multiple employees, on the **Expense** tab:

1. In **Step 1 Modify Roles By**, select *Role*.
2. In **Step 2 Role to Assign to Users**, select *Expense UI Preview*.
3. Click **Search**.
4. In the **Users Without this Role** list, select the desired users.
5. Click **Add**.
6. Click **Save**.

IMPORTANT: Switching back to the Existing UI

Any time during the review period, the admin can remove the role from any user, which returns the user to the existing UI unless:

- The user's group has been switched to the NextGen UI.
- or –
- The entire company has been switched to the NextGen UI.

When either of these events occur, the user can no longer access the existing UI.

LINK: SELECT EMPLOYEE GROUPS TO SWITCH TO THE NEXTGEN UI

Who can use this link?

This link appears if the admin currently has any of these roles – assigned to the **global** level:

- Expense Configuration Administrator
- Expense Configuration Administrator (Restricted)

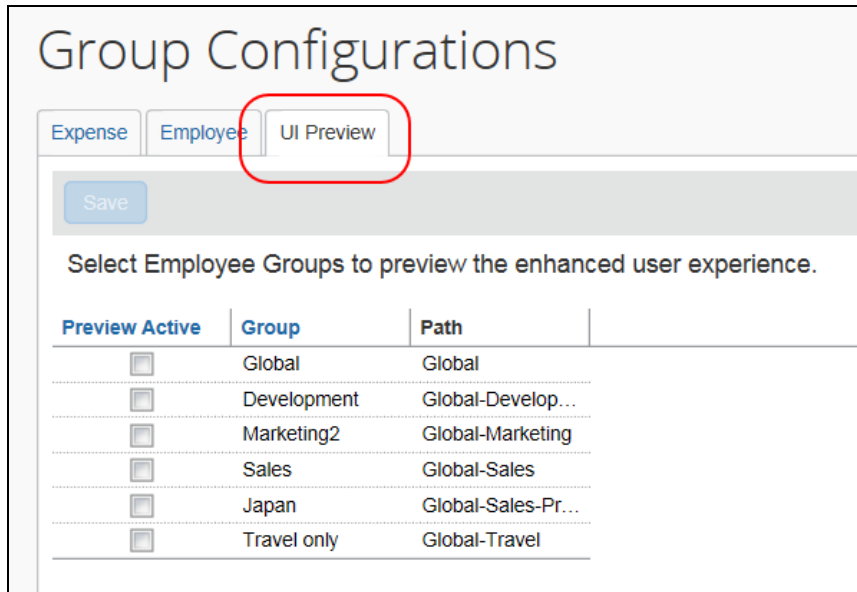
Why does the admin use this link?

The admin uses this link to assign the NextGen UI preview role to employee groups.

How does it work?

The admin clicks the **Select employee groups to switch to the NextGen UI** link. The **Groups Configuration** page appears.

The admin clicks the **UI Preview** tab.



The admin selects (enables) the check box in the **Preview Active** column for the desired groups and then clicks **Save** at the top of the table.

IMPORTANT: Switching back to the Existing UI

Any time during the review period, the admin can remove the setting from a group, which returns the entire employee group to the existing UI, unless the entire company has been switched to the NextGen UI. If so, the members of the group can no longer access the existing UI.

Company-wide preview

Company-wide preview

IMPORTANT - This turns on the preview for every Expense and Request user in the entire company. We recommend making sure any user-facing information, such as Company Notes, is up-to-date before turning on the preview for everyone. If there is more than one Expense administrator, please coordinate to ensure that appropriate change management is in place for your users before you make the switch.

[Turn on the NextGen UI](#)

WHO CAN USE THIS SECTION OF THE PAGE?

This section of the page appears if the admin currently has any of these roles – assigned to the **global** level:

- Expense Configuration Administrator
- Expense Configuration Administrator (Restricted)

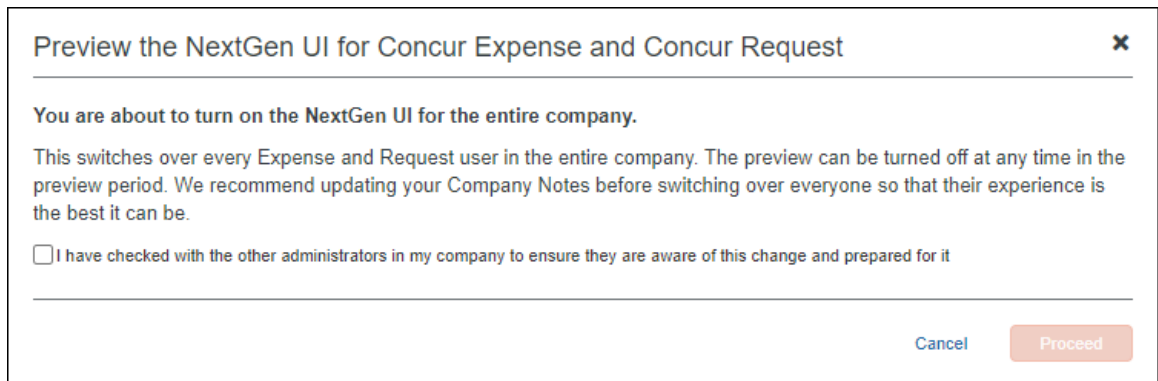
Why does the admin use this link?

The admin uses this link to turn on the NextGen UI for the entire company.

How does it work?

The admin clicks the **Turn on the NextGen UI** button.

Two confirmation dialog boxes appear. It is important that the admin understands the gravity of this action. SAP strongly recommends this is timed and coordinated across corporate teams as not all may be ready to launch at the same time.



Preview the NextGen UI for Concur Expense and Concur Request ✕

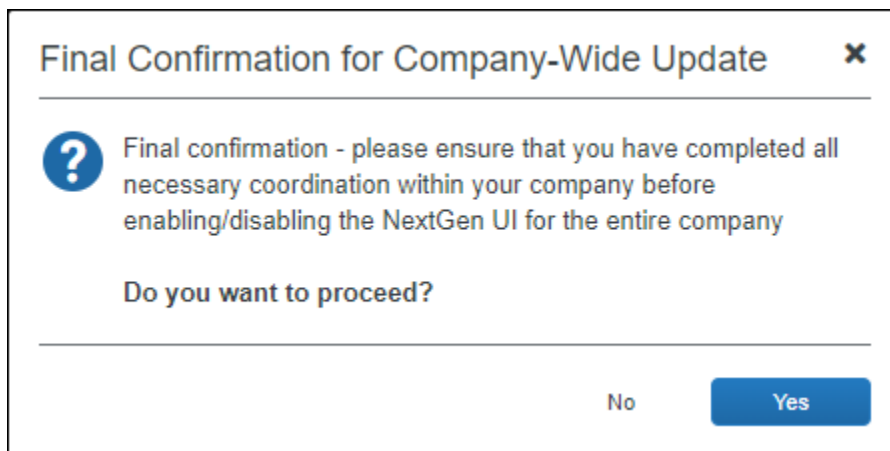
You are about to turn on the NextGen UI for the entire company.

This switches over every Expense and Request user in the entire company. The preview can be turned off at any time in the preview period. We recommend updating your Company Notes before switching over everyone so that their experience is the best it can be.


I have checked with the other administrators in my company to ensure they are aware of this change and prepared for it

Cancel Proceed

The **Proceed** button will not be available until the admin checks the box confirming that they have communicated with all affected administrators.



Final Confirmation for Company-Wide Update ✕

 Final confirmation - please ensure that you have completed all necessary coordination within your company before enabling/disabling the NextGen UI for the entire company

Do you want to proceed?

No Yes

The NextGen UI appears for Concur Expense, and if applicable, for Concur Request.

The **Turn on the NextGen UI** button changes to **Revert to prior experience**. Any time during the review period, the admin can return to this page and click the **Revert to prior experience** button to return the entire company to the existing UI.

NOTE: Users assigned to the NextGen UI via group or individual assignments will continue to see the NextGen UI.

IMPORTANT: SWITCHING BETWEEN THE NEXTGEN UI AND THE EXISTING UI

Once the entire company has been switched to the NextGen UI, admins, individual users, and groups cannot be switched back to the existing UI unless the entire company is switched back.

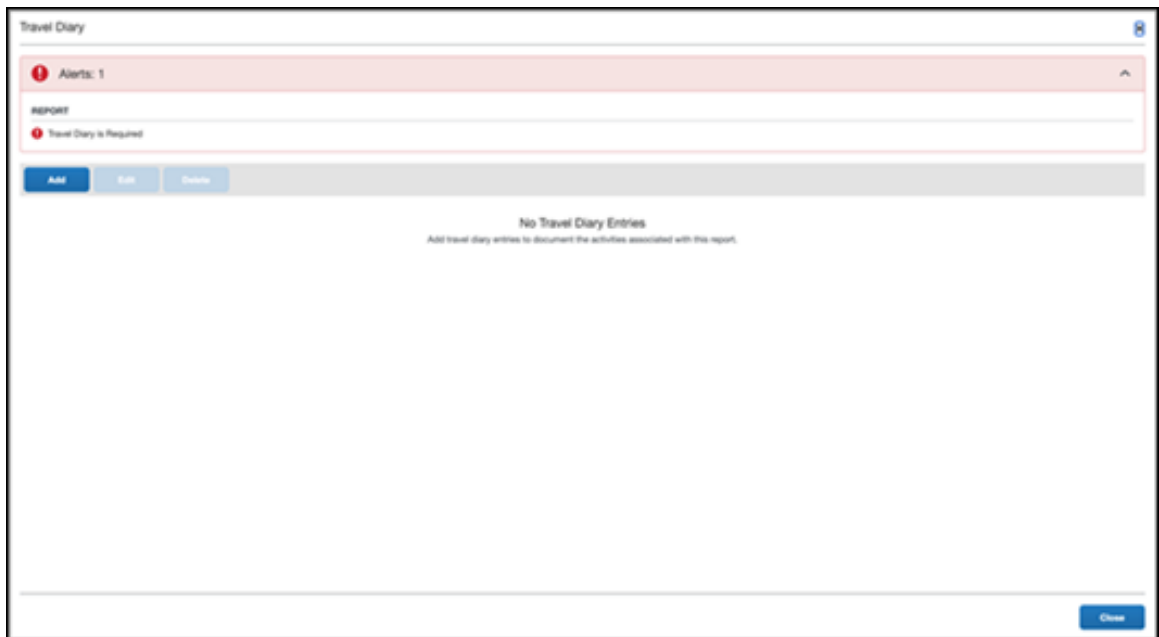
Section 5: IMPORTANT: Considerations Before Transitioning

Audit Rule Enhancement for Travel Diary

A new system exception code, TRVLD, is available for use with audit rules. The TRVLD exception code is specifically applicable for Travel Diary.

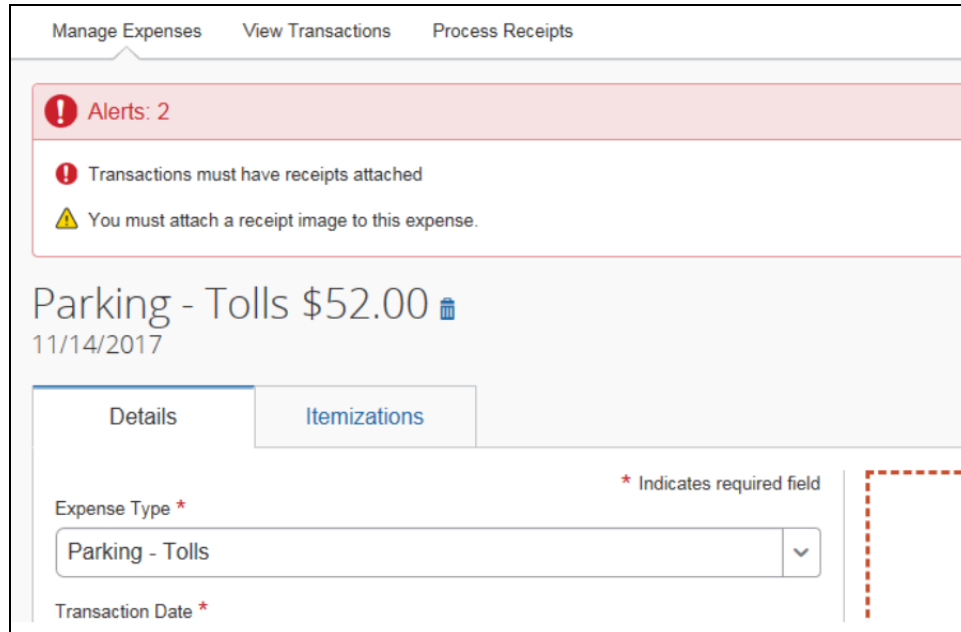
Audit rules related to Travel Diary and configured with this exception code include the following benefits:

- Exceptions display on both the **Travel Diary** and **Report** pages
- An **Exception View** link directs the user to the **Travel Diary** page



"Image Required" Audit Rules

In the existing UI, if a receipt is required (as defined in Receipt Handling/Receipt Limits), an icon appears. In the NextGen UI for Concur Expense, there is a message that looks very similar to an audit rule message.



The screenshot displays the 'Manage Expenses' section of the NextGen UI. At the top, there are navigation tabs for 'Manage Expenses', 'View Transactions', and 'Process Receipts'. Below these, a red alert banner indicates 'Alerts: 2'. The first alert is a red exclamation mark icon followed by the text 'Transactions must have receipts attached'. The second alert is a yellow warning triangle icon followed by the text 'You must attach a receipt image to this expense.' Below the alerts, the main expense entry is shown: 'Parking - Tolls \$52.00' with a trash icon and the date '11/14/2017'. There are two tabs: 'Details' (selected) and 'Itemizations'. Under the 'Details' tab, there are two required fields: 'Expense Type *' with a dropdown menu showing 'Parking - Tolls' and a small downward arrow, and 'Transaction Date *'. A legend indicates '* Indicates required field'. A dashed red line is visible on the right side of the form.

In this example of the NextGen UI for Concur Expense, the yellow warning is the standard system-provided information that a receipt image is required (based on Receipt Limits). This will always be a yellow warning, as there is always some possibility for exceptions to the rule.

The red alert shown above is based on an audit rule configured by the client. In this case, the client configured the rule to prevent submission without a receipt image.

Before the client transitions to the NextGen UI for Concur Expense, the admin should review audit rules that involve receipt images along with the associated exception text to ensure it provides an understandable experience for the user.

"Allocation Required" Audit Rules

In the existing UI, the default allocation for the user is not visible. The user only sees allocation information if they have specifically entered allocations. In the NextGen UI for Concur Expense, the default allocation is visible to the user on the allocations page.

Allocate ×

Expenses: 1 | 430,00\$

| | | |
|--------------------|----------------------------|------------------------|
| Amount 430,00\$ | Allocated 430,00\$ 100% | Remaining 0,00\$ 0% |
|--------------------|----------------------------|------------------------|

Edit

Percent

Add ▾ Edit Remove Save as Favorite

| Department | Region | Project Code | Code | Percent % |
|------------------|------------|--------------|---------|----------------------------------|
| <i>Pre-Sales</i> | <i>APA</i> | | PRE-APA | <input type="text" value="100"/> |

Cancel Save

In this example of the NextGen UI for Concur Expense, the default allocation row is shown in italic text with a non-editable percent of 100.

Before the client transitions to the NextGen UI for Concur Expense, the admin should review audit rules that involve allocations along with the associated exception text to ensure it provides an understandable experience for the user.

IMPORTANT: "Fully Allocated" Audit Rules

Concur Expense always has and always will automatically allocate 100% of an expense. In fact, there is no case where an expense can be allocated to less than 100%. Whatever the user does not manually allocate (for example, to a different cost center) is **automatically** allocated to the user's default allocation (assume in this case, to the user's cost center).

In the existing UI, that fact may not have been obvious. In the NextGen UI for Concur Expense, the default allocation row appears. When the user initially enters the allocation page, the default row shows a read-only percentage of 100% (if allocating by percent). As the user allocates, the percentage in the default allocation row changes accordingly. So:

- If the user allocates 60% to another cost center, the default allocation row changes to 40%. The user does not have to manually enter an allocation for their own cost center for 40%; it is automatic.
- If the user allocates 60% to one cost center and 40% to another, then the default allocation row changes to 0%. No part of the expense will be allocated to the user's default cost center.
- If the user does not manually allocate, then the default allocation row remains at 100%. The entire expense is automatically allocated to the user's default cost center.

Therefore, if a company has an audit rule using the condition *Fully Allocated*, **the company must re-examine the business reason for this rule.**

The screenshot shows the 'Conditions' tab of an audit rule configuration. It includes an 'Insert' button and a 'Remove' button. Below these are three input fields: 'Entry' with a dropdown menu set to 'Fully Allocated', 'Operator' with a dropdown menu set to 'Equal', and 'Value' with a dropdown menu set to 'No'.

The company may have assumed that the user had to manually allocate any remaining part of the expense to their own cost center. If that is the case, then the rule is not necessary. So:

- The company should remove the rule.
– **or** –
- If the company chooses to keep the rule, they must ensure that the exception text fully explains the business purpose to users.

Field Values in the Default Allocation Row

In this sample, data (in this case, the user's cost center) automatically appears in the default allocation row.

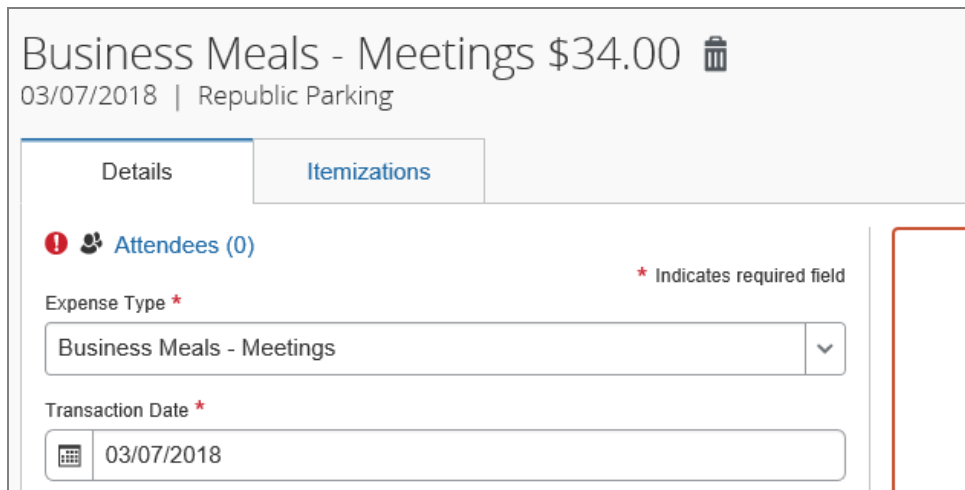
| Department | Region | Project Code | Code | Percent % |
|------------|--------|--------------|---------|-----------|
| Pre-Sales | APA | | PRE-APA | 100 |

Whether or not data appears in the default allocation row is based on the company's configuration. This may be intentional, if allocations are used to route costs to specific projects only when required.

If the company wants data to appear, the company should work with SAP Concur support to update the configuration to assign values based on copydown of fields from the employee profile. It is important to first discuss this with the company's financial IT team, to ensure it meets the requirements for data feeding into the company's financial systems.


"Attendee" Audit Rules

In the NextGen UI for Concur Expense, the attendee information is on a different page. In the example below, the user can clearly see that attendees are required when no attendees have been added to the expense.




The screenshot displays the SAP Concur Expense interface for a transaction titled "Business Meals - Meetings" with a total amount of \$34.00, dated 03/07/2018, and categorized under "Republic Parking". The interface has two tabs: "Details" (selected) and "Itemizations". Under the "Attendees" section, there is a red warning icon and the text "Attendees (0)". To the right of this section, a red asterisk indicates a required field. Below this, the "Expense Type" field is a dropdown menu currently set to "Business Meals - Meetings", and the "Transaction Date" field is a date picker set to "03/07/2018". Both fields have a red asterisk next to their labels, indicating they are required. A red vertical line is visible on the right side of the form, possibly indicating a validation error or a required field.

If the configuration automatically defaults 'me' (the user) as an attendee, this may not provide a clear call to action for the user.

Business Meals - Meetings \$34.00 

03/07/2018 | Republic Parking

Details **Itemizations**

 Attendees (1) * Indicates required field


Expense Type *


Transaction Date *

Before the client transitions to the NextGen UI for Concur Expense, the admin with a configuration that defaults the user as an attendee automatically should consider whether it would help users to add an audit rule that will provide an alert when there are less than 2 attendees.

Payment Type Labels

In the NextGen UI for Concur Expense, the **Payment Type** field has a much higher prominence than in the existing UI. This field is displayed on the **Available Expenses** section of the **Manage Expenses**, the expense list within a report, and the available expenses within the Add (to report) option.

SAP Concur  Travel **Expense** Approvals App Center Links | Help





Manage Expenses View Transactions Profile 

Trip to Seattle \$730.13 **More Actions** **Submit Report**

Not Submitted

Report Details Print/Share Manage Receipts

Add Edit Delete Copy **Allocate** Combine Expenses Move to

| <input type="checkbox"/> | Receipt | Payment Type | Expense Type | Vendor Details | Date | Requested |
|--------------------------|---|--------------|--------------|--|------------|-----------------|
| <input type="checkbox"/> |  | Visa | Lunch | Daily Grill Seattle, Washington | 03/09/2018 | \$24.00 |
| <input type="checkbox"/> |  | Visa | Hotel | Hyatt Hotels Seattle, Washington | 03/09/2018 | \$614.13 |
| <input type="checkbox"/> |  | Visa | Taxi | Uber Technologies Seattle, Washington | 03/09/2018 | \$56.00 |
| <input type="checkbox"/> |  | Visa | Dinner | Ruth's Chris Steakhouse Seattle, Washington | 03/08/2018 | \$36.00 |
| | | | | | | \$730.13 |

Before the client transitions to the NextGen UI for Concur Expense, the admin should review payment type names to consider whether they are:

- Clear to the user
– **and** –
- Concise for ease of display in a column

► **To edit the payment type label:**

1. Click **Administration > Expense > Expense Admin > Localization** (left menu).
2. On the **Edit Localization** tab, choose the target language, select category **Payment Types**, and click **Modify**.

Localization

Edit Localization | Export Localization | Import Localization

Target Language: English (dropdown) Status: Show All Items (dropdown)

Find Category with text containing: [input] Search

Modify

| Category ▲ | Status |
|------------------------------|----------|
| Payment Data Source Names | Complete |
| Payment Expense Types | Complete |
| Payment Policy Names | Complete |
| Payment Types | Complete |
| Policy Names | Complete |
| Print Content Variable Types | Complete |

3. On the resulting page, find the payment type to be changed and edit the label in the **Payment Type** column.

| Source Value ▲ | Payment Type | Source Value | Description | Last Modified |
|------------------------------------|--------------------------|----------------------------------|----------------------------------|---------------|
| Cash | Cash | Payment in cash | Payment in cash | 06/21/2005 |
| Cash Advance Return | Cash Advance Return | Cash Advance Return Pseudo Pa... | Cash Advance Return Pseudo Pa... | 06/21/2005 |
| Company | Company | Company Pseudo Payment Type... | Company Pseudo Payment Type... | 06/21/2005 |
| Company Paid | Company Paid | Payment by company check | Payment by company check | 06/21/2005 |
| Corporate Card CBCP (offsets no... | VISA | Company-paid corporate card | Company-paid corporate card | 04/20/2010 |
| Employee | Employee | Employee Pseudo Payment Type... | Employee Pseudo Payment Type... | 06/21/2005 |
| IBIP | IBIP | Employee-paid corporate card | Employee-paid corporate card | 11/03/2005 |
| Pending Card Transaction | Pending Card Transaction | Payment in cash | Payment in cash | 01/21/2012 |
| Personal | Personal | Employee personal card | Employee personal card | 11/03/2005 |

Page 1 of 1 | Displaying 1 - 10 of 10

4. Click **Save**.

"Pending Card Transaction" Payment Type

On the **Available Expenses** section of the **Manage Expenses** page, travel segment card transactions can display with the *Pending Card Transaction* message in the Payment Type field, as shown below.

| AVAILABLE EXPENSES <small>View: All Expenses</small> | | | | | |
|--|--------------------------|--------------|-------------------|------------|----------------------------|
| <input type="button" value="Delete"/> <input type="button" value="Combine Expenses"/> <input type="button" value="Move to"/> | | | | | |
| <input type="checkbox"/> Receipt | Payment Type | Expense Type | Vendor Details | Date | Amount |
| <input type="checkbox"/> | Pending Card Transaction | Hotel | Choice | 04/11/2018 | \$0.00 <i>Estimated</i> |
| <input type="checkbox"/> | Visa | Taxi | Uber Technologies | 03/09/2018 | \$56.00 |
| <input type="checkbox"/> | Visa | Hotel | Hyatt Hotels | 03/09/2018 | \$614.13 |
| <input type="checkbox"/> | Visa | Breakfast | Daily Grill | 03/09/2018 | \$24.00 |

SAP recommends that you enable and configure the Pending Card Transaction payment type for your company, so that the higher prominence of the payment type column takes advantage of this option to guide your users.

To configure so this message appears, follow these steps as detailed below:

- Activate the payment type for the desired group
- Configure the Travel Segment Payment Types for the proper segments

► **To activate the payment type:**

1. Click **Administration > Expense > Expense Admin > Group Configurations** (left menu).
2. On the **Expense** tab, click **Modify** in the **Payment Type** column for the desired group.

| Group Configurations | | | |
|--|-----------------------|----------|---------------|
| Expense Employee UI Preview | | | |
| <input type="button" value="Modify"/> <input type="button" value="New"/> <input type="button" value="Remove"/> | | | |
| Group | Path | Policies | Payment Types |
| Global (in use) | Global | Modify | Modify |
| Global- AEBT (in use) | Global-Global- AEBT | Modify | Modify |
| Global-COA (in use) | Global-Global- COA | Modify | Modify |
| Global- France (in use) | Global-Global- France | Modify | Modify |
| NO EXPENSE (in use) | Global-UK- Sales | Modify | Modify |

3. In the **Is Active for Group** column, select (enable) the **Pending Card Transaction** check box.

Configuration for Group: Global

| Payment Type | Is Active For Group | Default Payment Type |
|-----------------------------|-------------------------------------|--------------------------|
| Cash | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Company Billed Company Paid | <input type="checkbox"/> | <input type="checkbox"/> |
| Company Paid | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CS Supported Card | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CS Unsupported Card | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| IBCP | <input type="checkbox"/> | <input type="checkbox"/> |
| IBIP | <input type="checkbox"/> | <input type="checkbox"/> |
| Pending Card Transaction | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Personal | <input type="checkbox"/> | <input type="checkbox"/> |
| PrePaid to Ctrip | <input type="checkbox"/> | <input type="checkbox"/> |
| test pat 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| test pat 2 | <input type="checkbox"/> | <input type="checkbox"/> |

4. Click **Save**.

► **To define a default payment type for the travel segments:**

1. In the left menu, click **Travel Segments Payment Types**.
2. For the Air Ticket, Car Rental, and Hotel Reservation travel segments, select *Pending Card Transaction* in the **Default Payment Type** column.

Travel Segments Payment Types

If the user has corporate credit card, then payment type default is Pending Card Transaction given that this payment type is active for the user.

Filter

View By: Group Name | Group Name: Global

| Paid By | Travel Segment | Default Payment Type |
|---------------------------|-----------------------|--------------------------|
| | Helicopter Ticket | Cash |
| | Air Ticket | Pending Card Transaction |
| | Air subscription | Company Paid |
| | Car Rental | Pending Card Transaction |
| | Dining | Cash |
| | Event | Cash |
| | Hotel Reservation | Pending Card Transaction |
| Defaults for segment type | Insurance | Company Paid |
| | Limousine Reservation | Cash |

Report Key in Report Header

The report key is not displayed (to end users) within the report header to comply with stringent SAP Concur security and compliance.

- **Approvers and processors** – The processor will have access to this field for query and for viewing to allow cross-reference to any accounting extract issues.
- **Printed expense reports** – The report key is printable on the printed expense report.
- **Extracts** – The report key is available for extracts such as the standard accounting extract (SAE).
- **Reporting tools** – The report key is available within SAP Concur reporting tools such as Cognos.

Section 6: Configuring Attendee Search for Attendee Types

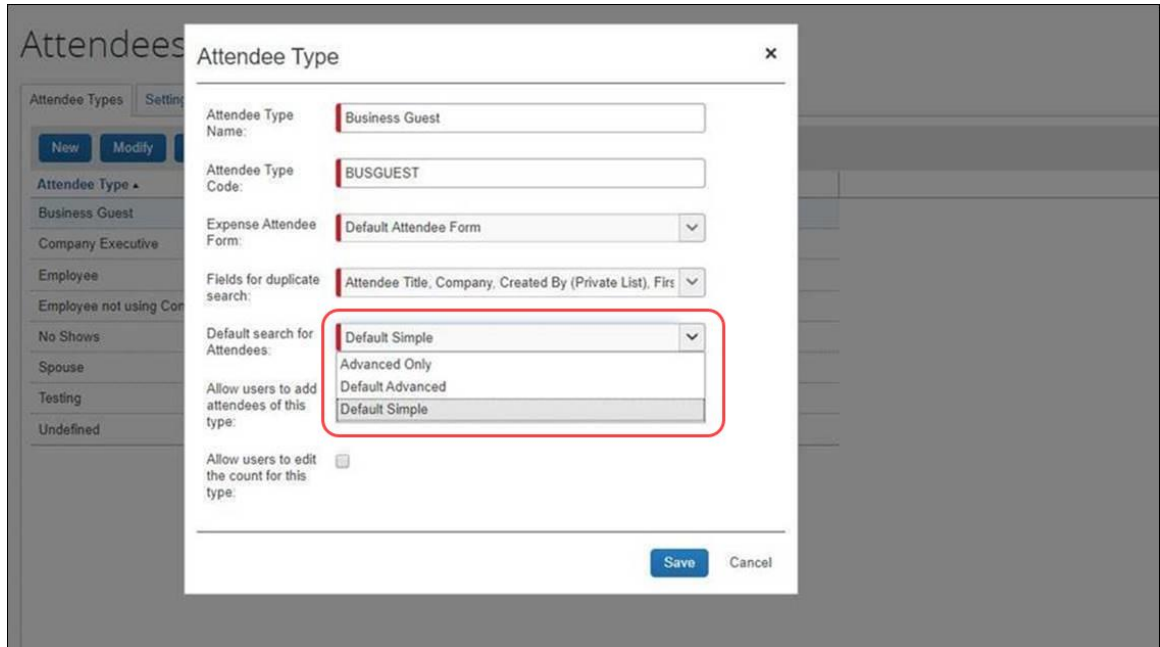
In the NextGen UI for Concur Expense, there are two types of attendee searches – simple search and advanced search. In Concur Expense Professional Edition, you can configure what type of attendee search is displayed for attendee types on the **Attendees** tab on the **Add Attendees** page in the NextGen UI.

The choices are:

- *Default Simple* – This choice prompts the user with the type-ahead field where the user can enter first or last name of the attendee and provides access to the advanced search.
- *Default Advanced* – This choice prompts the user with the advanced options and provides access to the simple search.
- *Advanced Only* – This choice provides the user with the advanced search and does not provide access to the simple search.

The attendee search is configured for attendee types using the **Default search for Attendees** setting on the **Attendee Type** dialog in Attendees (**Administration > Expense > Expense Admin > Attendees**).

While the **Default search for Attendees** setting is available to all expense admins, the effects of this setting are only visible in the NextGen UI. End users in the existing legacy UI will continue to see Quick Search as the default regardless of what the admin sets as the default search per attendee type.



► **To configure attendee search for an attendee type**

1. Click **Administration > Expense > Expense Admin > Attendees**.

The **Attendees** page appears.

2. On the **Attendee Types** tab, either:
 - ◆ Double-click the desired attendee type.
 - or –
 - ◆ Click the desired attendee type and then click **Modify**.

The **Attendee Type** dialog appears.

3. In the **Default search for Attendees** list, click one of the following:
 - ◆ *Default Simple*
 - ◆ *Default Advanced*
 - ◆ *Advanced Only*
4. Click **Save**.



For more information about attendees and attendee type configuration, refer to the *Concur Expense: Attendees Setup Guide*.