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 *Report Key in Report Header* section.
September 4, 2020	Added the *Audit Rule Enhancement for Travel Diary* section.
July 2, 2020	Clarifications made in the *Enablement Considerations* section.
July 1, 2020	Made the following updates: • Added the *Enablement Considerations* section.
June 10, 2020	Made the following updates: • Updated the information about new customers in the *Phased Approach Section.* • Updated and renamed the *Using the Preview NextGen UI Page* section to *Using the User Experience Settings Page*. 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 *Early Access / Opt-In / Mandatory Move* section • Replaced term "NextGen Expense" with "NextGen UI" or "the NextGen UI for Concur Expense" for accurate product branding. • Added the *Configuring Attendee Search for Attendee Types* 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
April 18, 2019	Added clarification about the switching between NextGen Expense and the existing UI
October 17, 2018	Added information about Payment Type Labels
August 7, 2018	Changed the timeframes for Early Access period and the Opt-In period
June 18, 2018	Added additional information about "Fully Allocated" allocation audit rules
April 9, 2018	Added: • Clarification when previewing for yourself • Additional examples in the *IMPORTANT: Considerations Before Transitioning* section
March 14, 2018	Added the following: • 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.

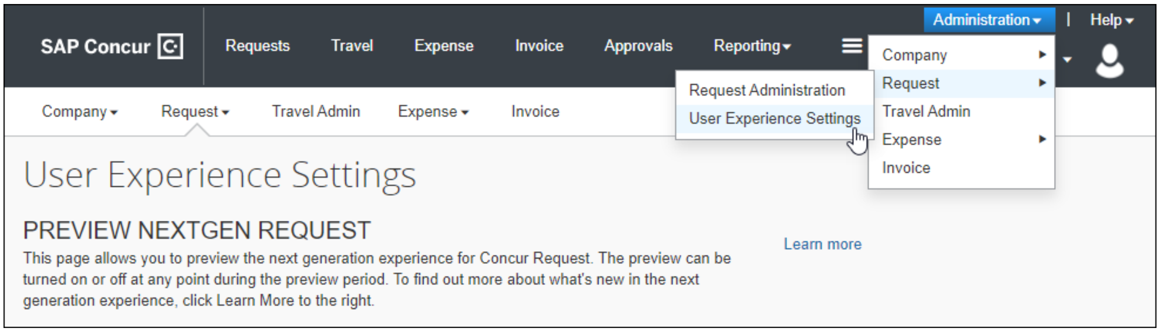
If you enable the NextGen UI for your entity, the NextGen UI will be enabled for both Concur Expense and Concur Request. If you only have Concur Expense or Concur Request, the NextGen UI will only be enabled for the product you have.

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.

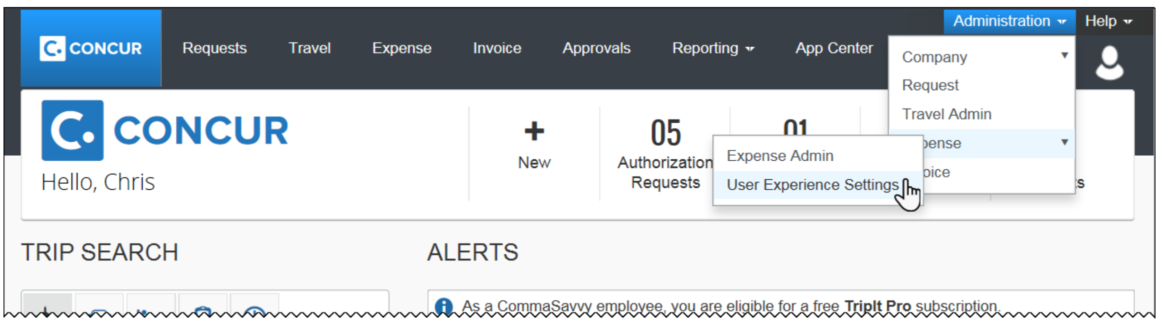
If the admin does not see the **Administration** > **Request** > **User Experience Settings** menu selection, the NextGen UI for Concur Request is enabled with Concur Expense using the **Administration** > **Expense** > **User Experience Settings** menu, and your entity is currently using the unified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

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



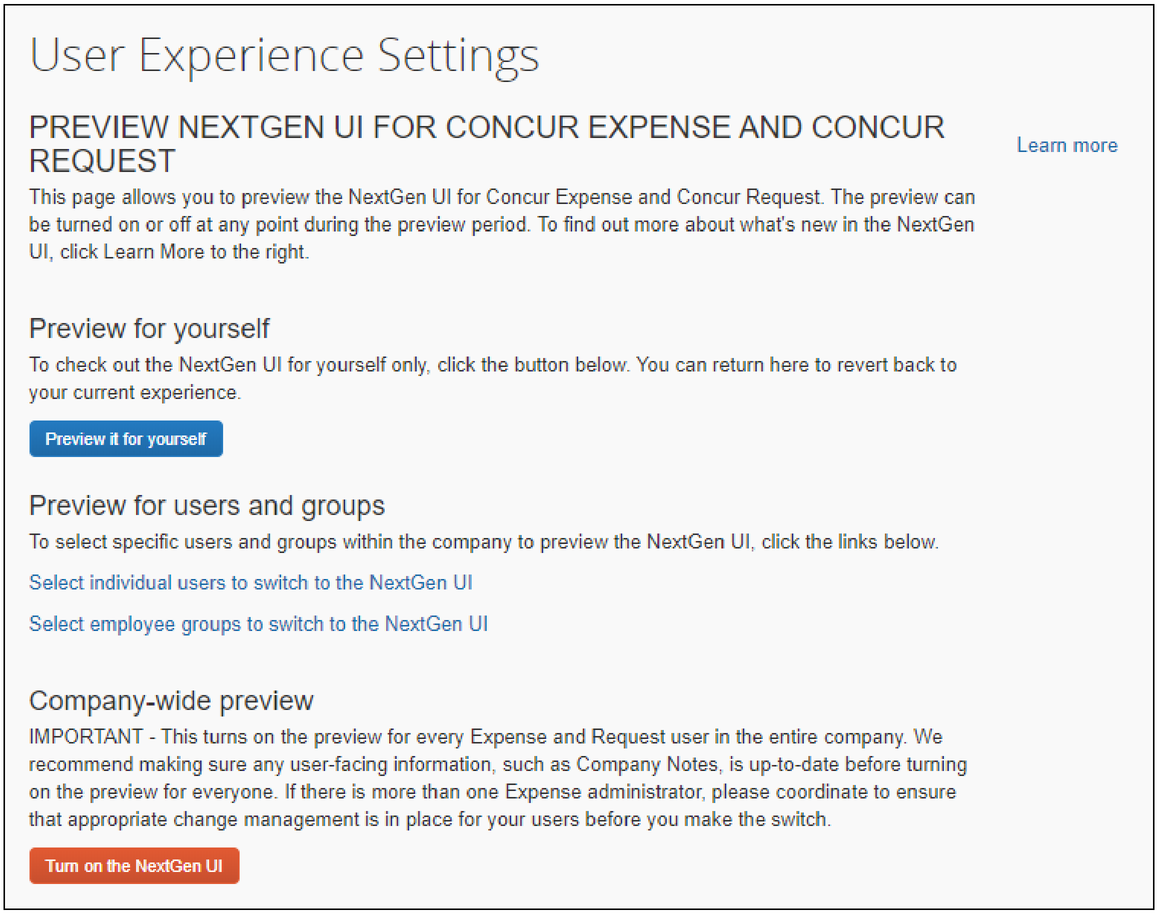
Enabling the NextGen UI

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

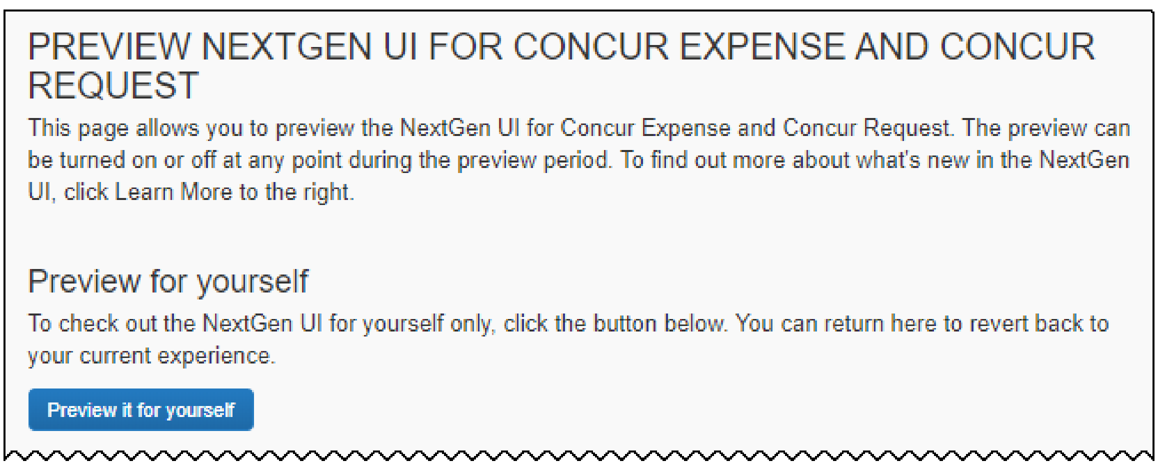


The **User Experience Settings** page appears.

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.



Preview 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:

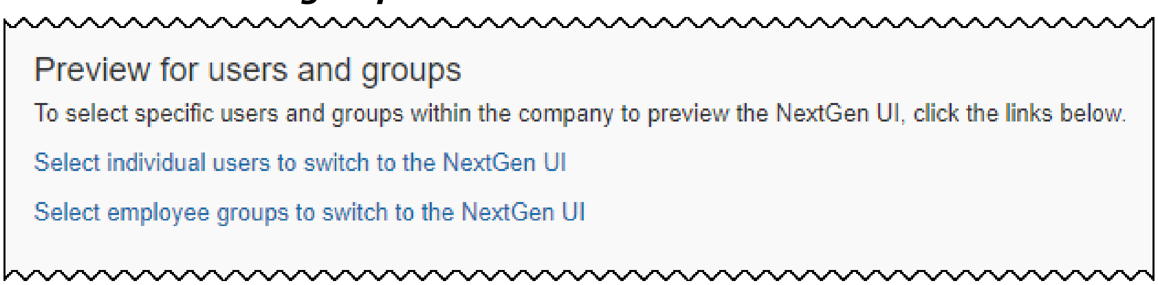
- The admin's group has been switched to the NextGen UI.

  – 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:

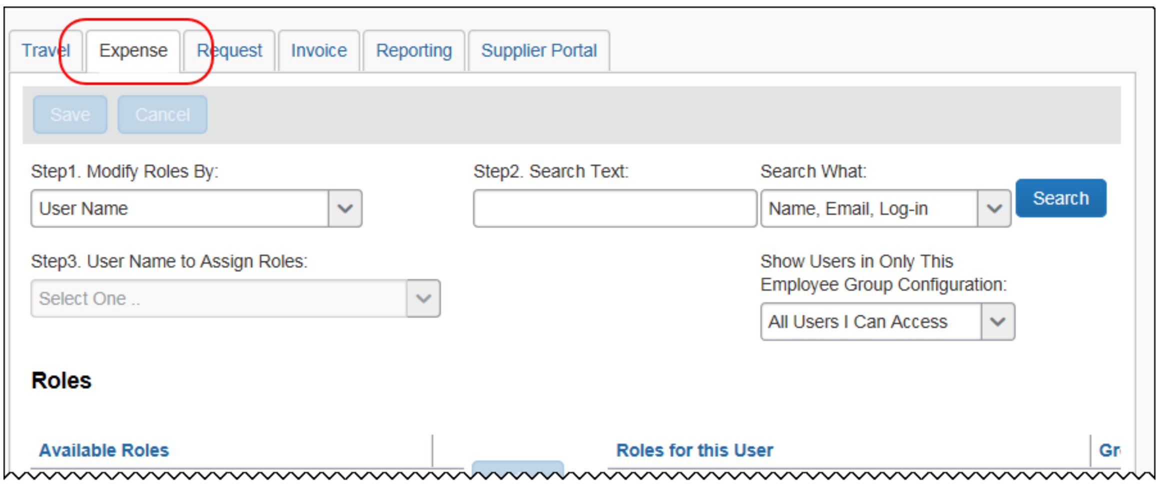
- Expense Configuration Administrator ***plus*** User Permissions
- Expense Configuration Administrator (Restricted) ***plus*** User Permissions

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.

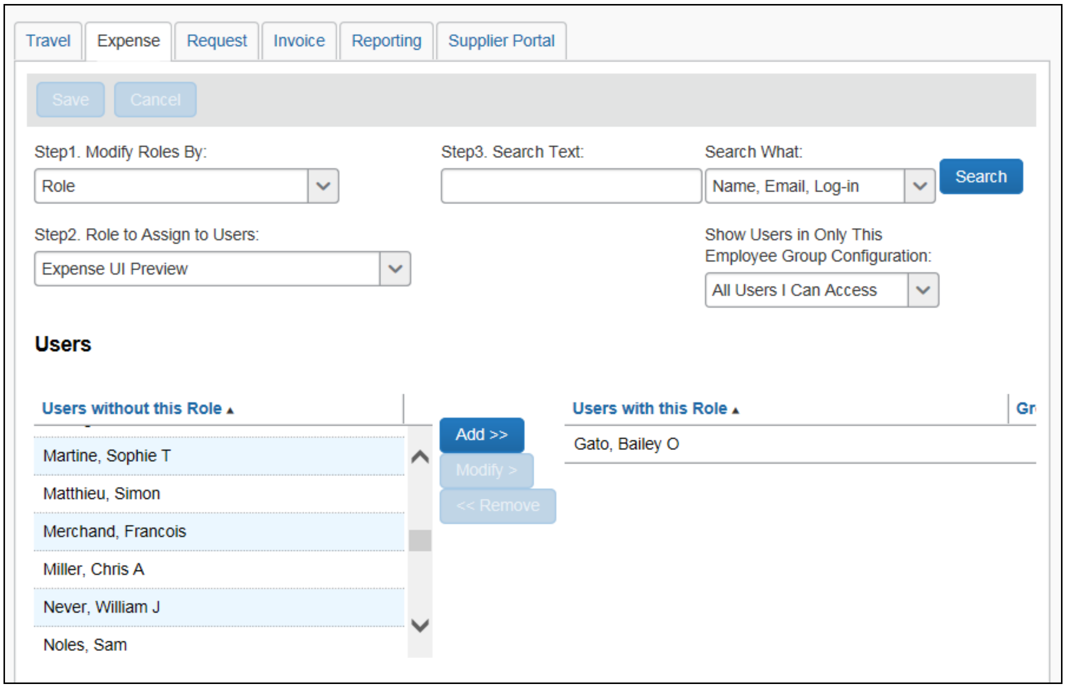
How does it work?

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.



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)

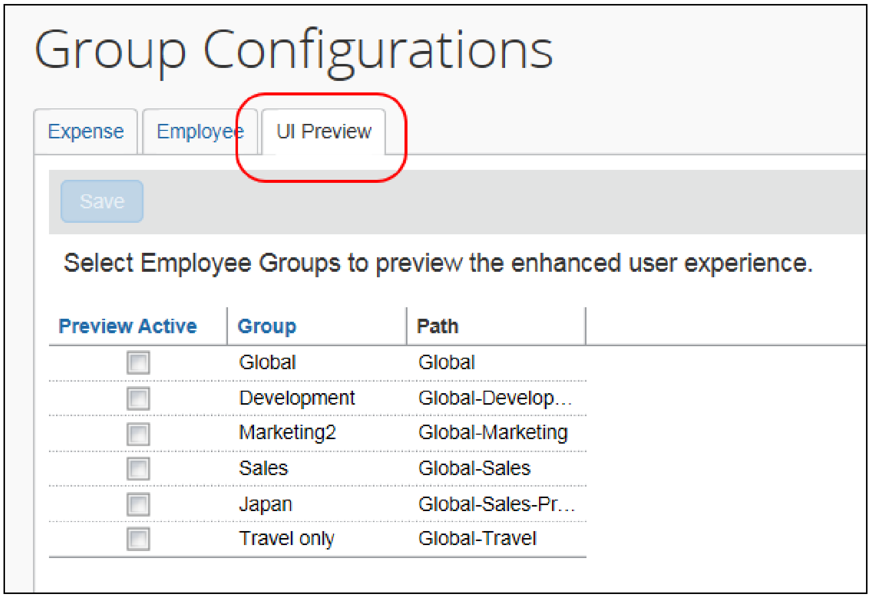
Why does the admin use this link?

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.

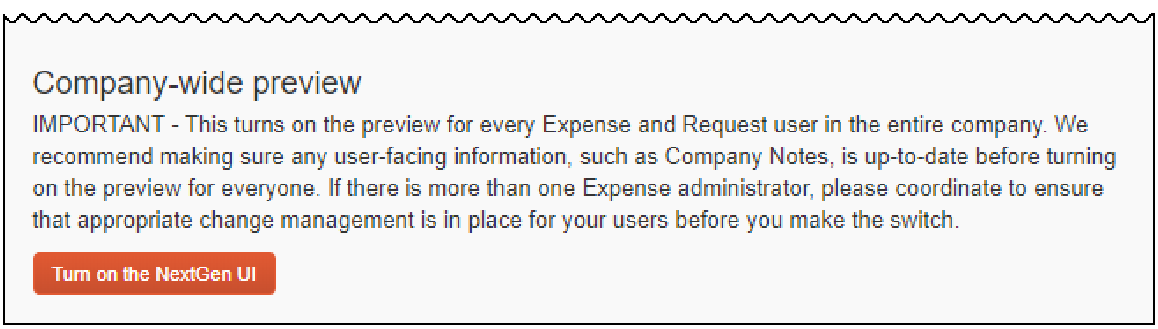


The admin selects (enables) the check box in the **Preview Active** column for the desired groups and then clicks **Save** at the top of the table.

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



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)

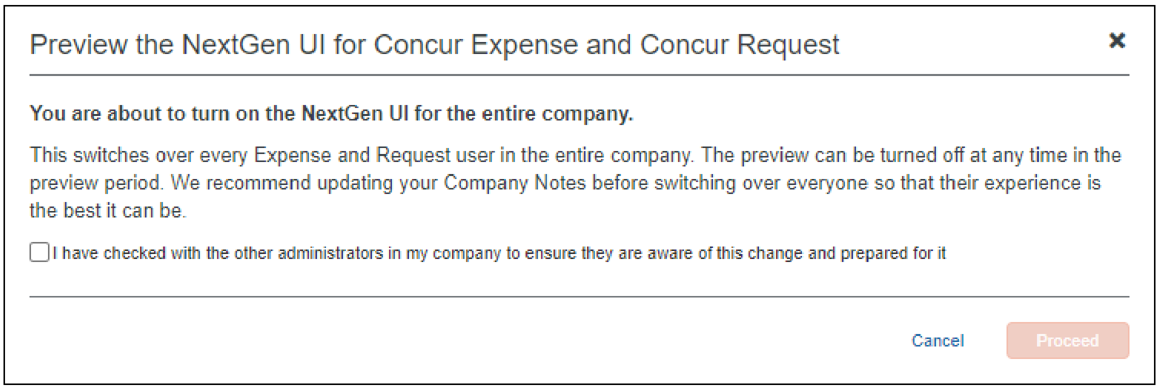
Why does the admin use this link?

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

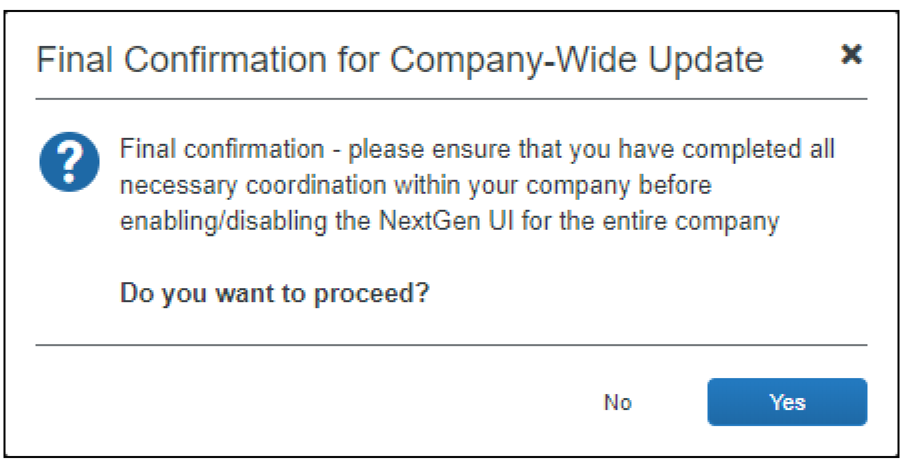
How does it work?

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.



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



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

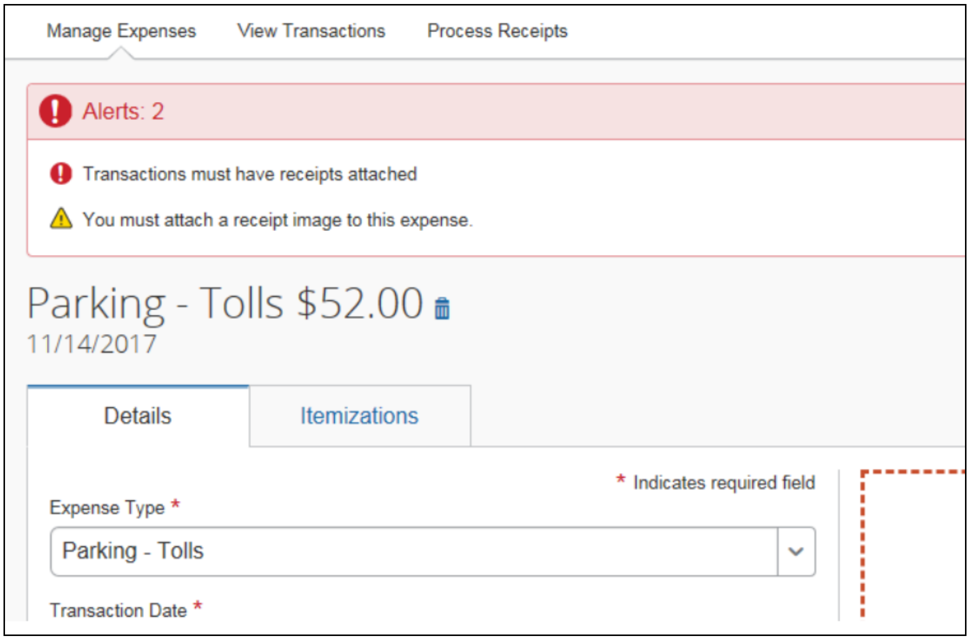
A new system exception code, TRVLD, is available for use with audit rules. The TRVLD exception code is specifically applicable for Travel Diary.

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.



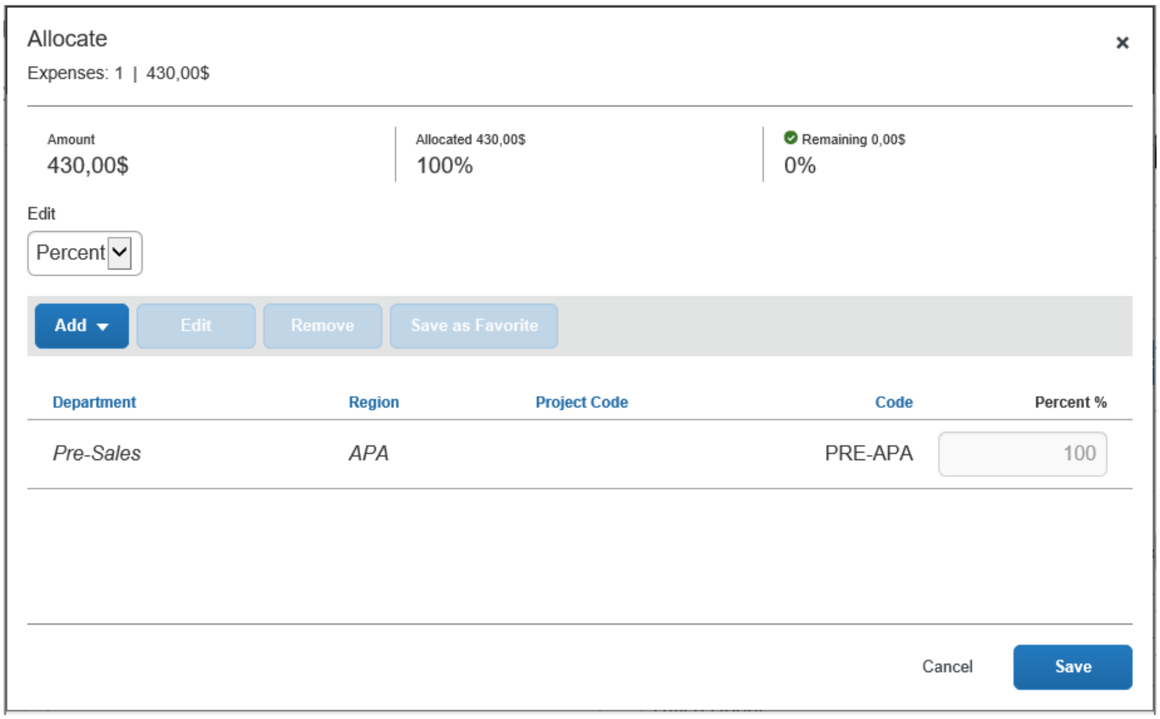
In this example of the NextGen UI for Concur Expense, the yellow warning is the standard system-provided information that a receipt image is required (based on Receipt Limits). This will always be a yellow warning, as there is always some possibility for exceptions to the rule.

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.



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.

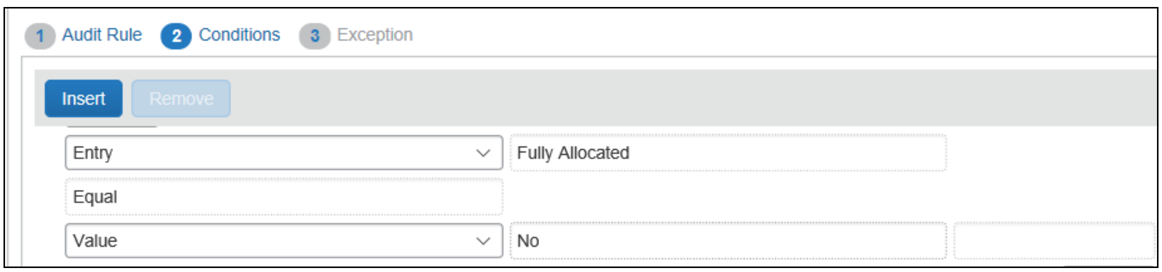
IMPORTANT: "Fully Allocated" Audit Rules

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 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***.

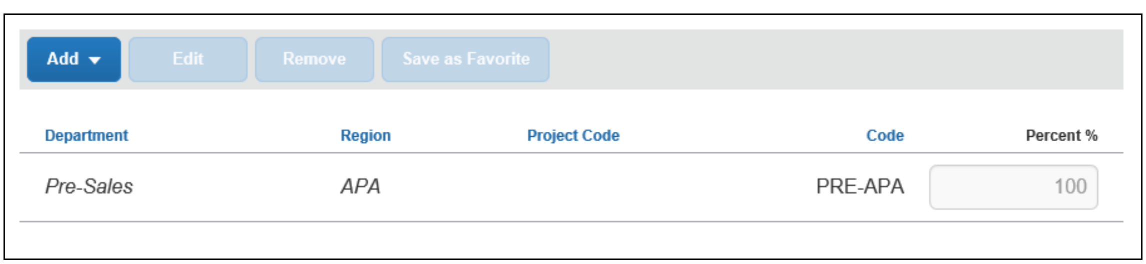


The company may have assumed that the user had to manually allocate any remaining part of the expense to their own cost center. If that is the case, then the rule is not necessary. So:

- 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.

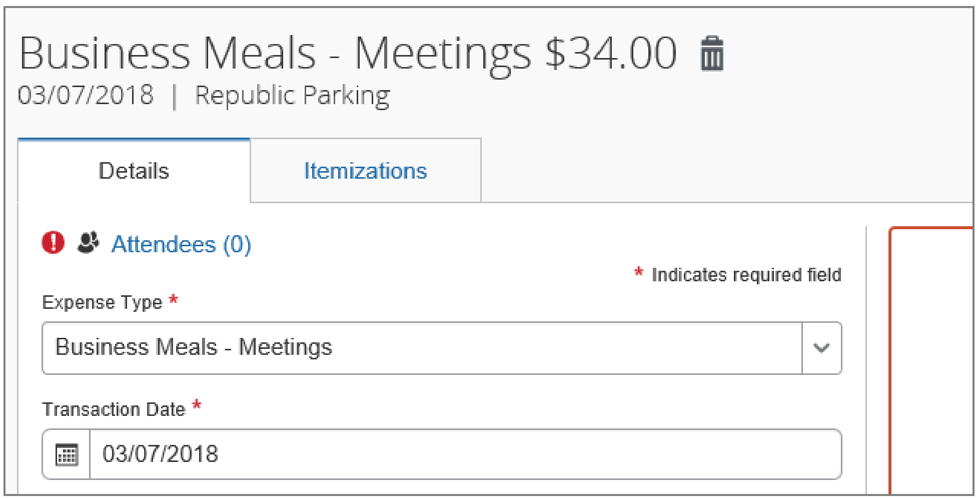


Whether or not data appears in the default allocation row is based on the company's configuration. This may be intentional, if allocations are used to route costs to specific projects only when required.

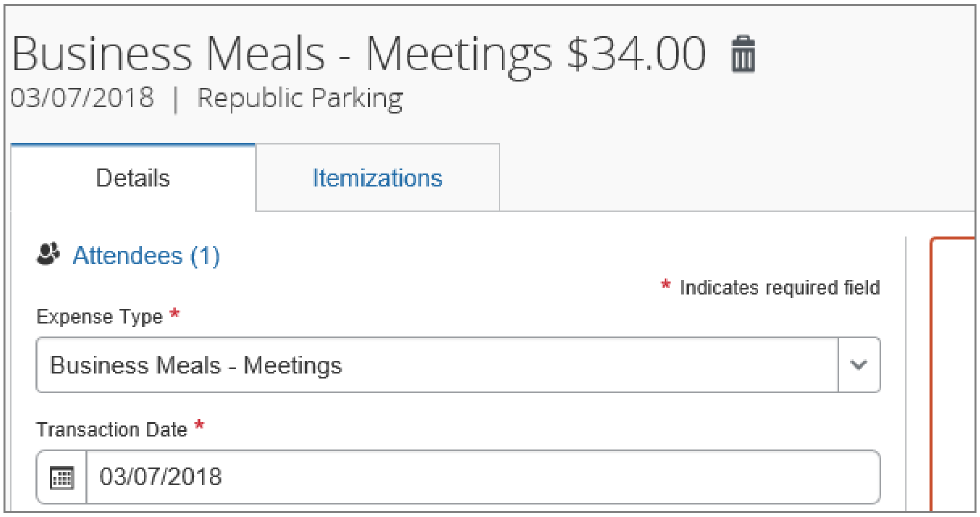
If the company wants data to appear, the company should work with SAP Concur support to update the configuration to assign values based on copydown of fields from the employee profile. It is important to first discuss this with the company's financial IT team, to ensure it meets the requirements for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



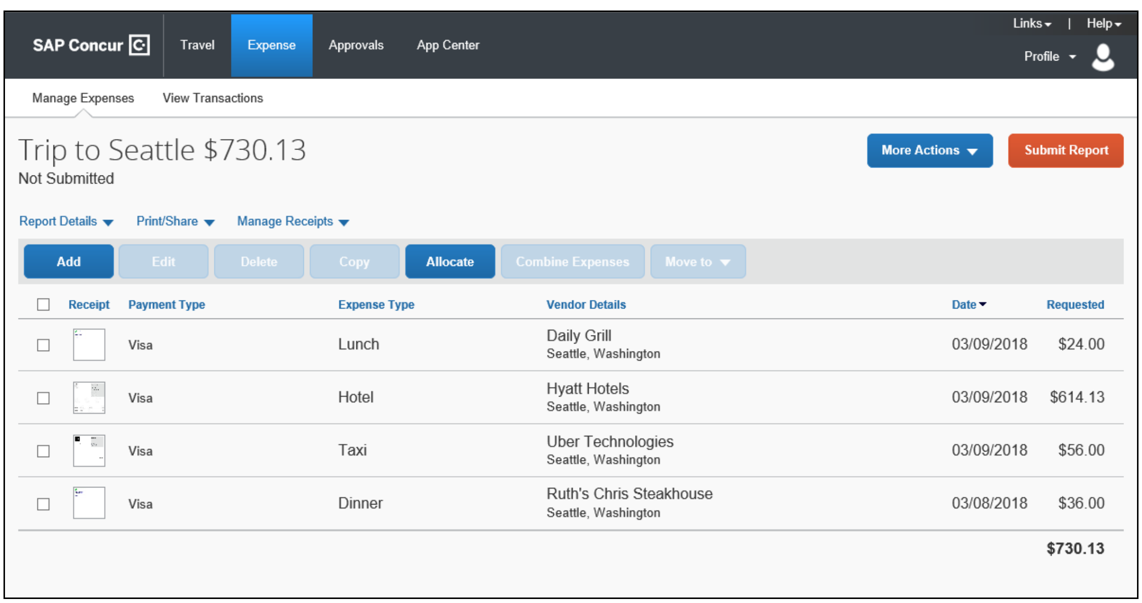
If the configuration automatically defaults 'me' (the user) as an attendee, this may not provide a clear call to action for the user.



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.



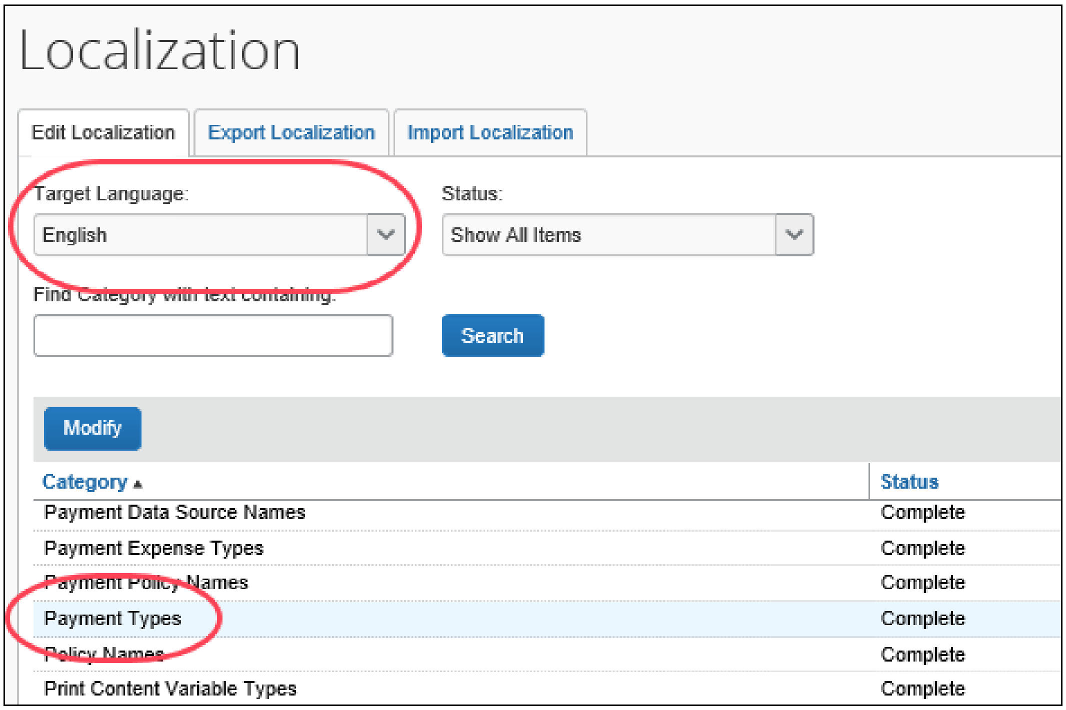
Before the client transitions to the NextGen UI for Concur Expense, the admin should review payment type names to consider whether they are:

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

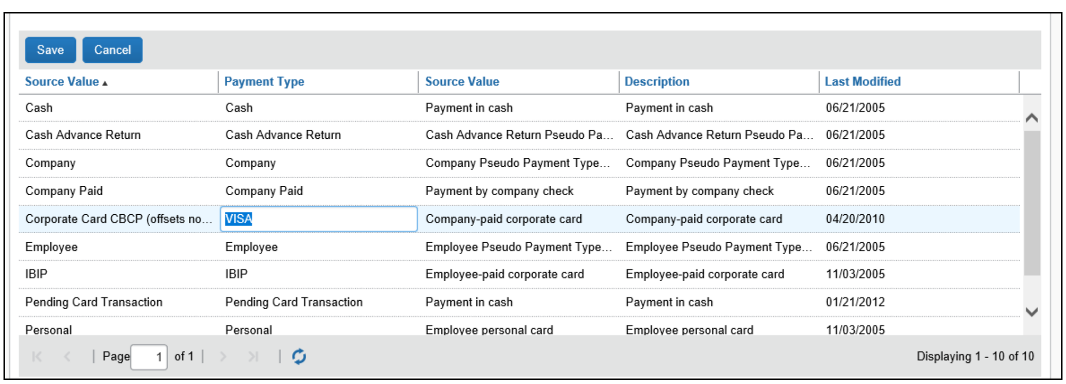
To edit the payment type label:

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**.



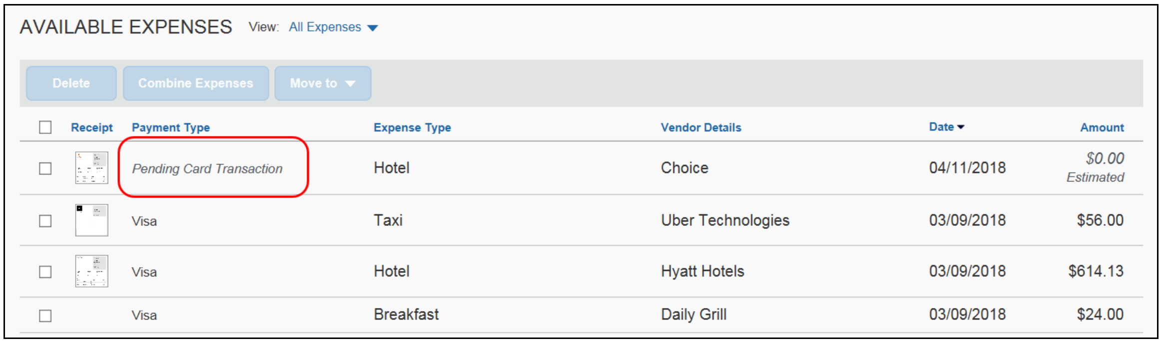
3. On the resulting page, find the payment type to be changed and edit the label in the **Payment Type** column.



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.



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.

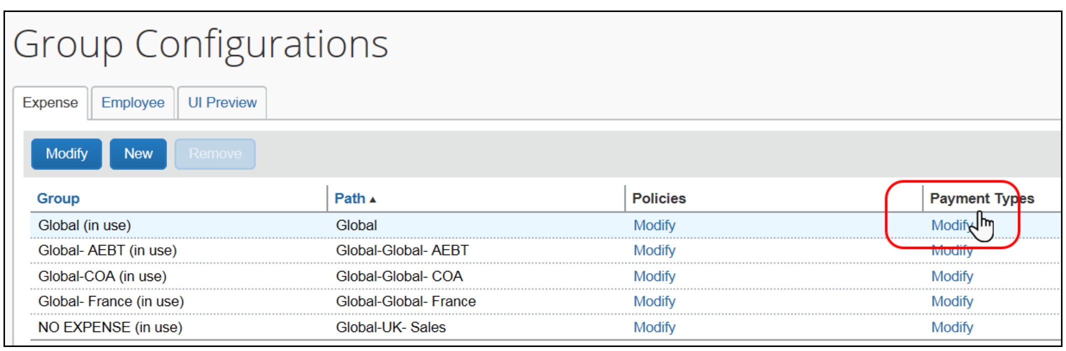
To configure so this message appears, follow these steps as detailed below:

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

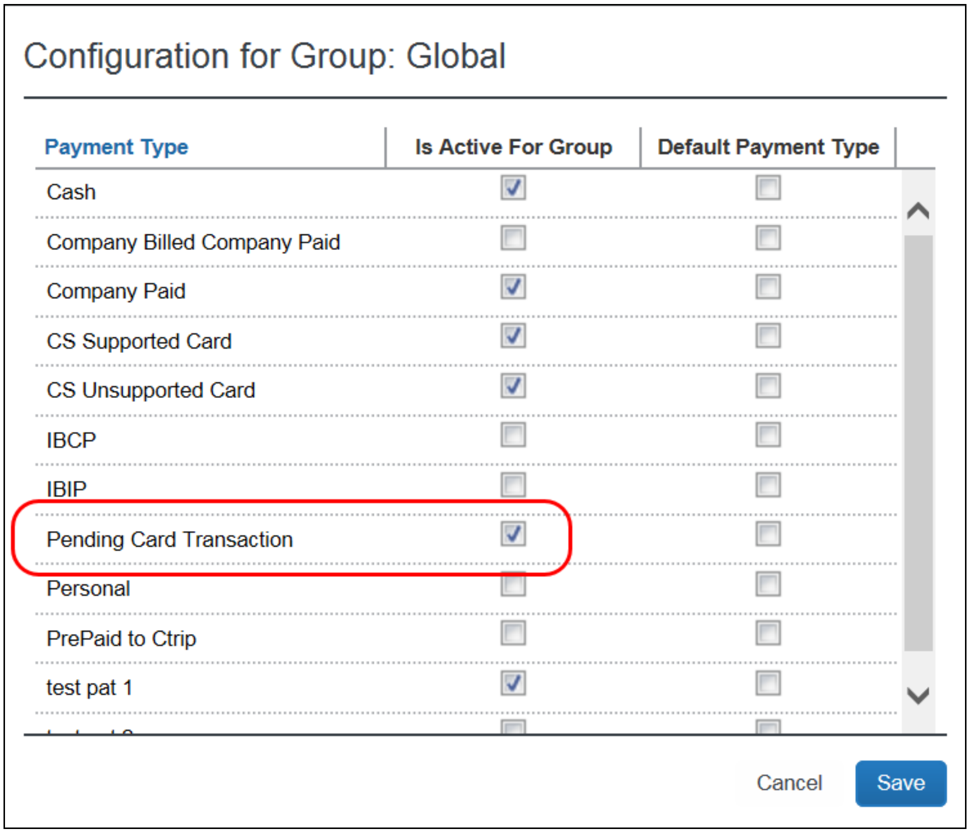
To activate the payment type:

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.



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

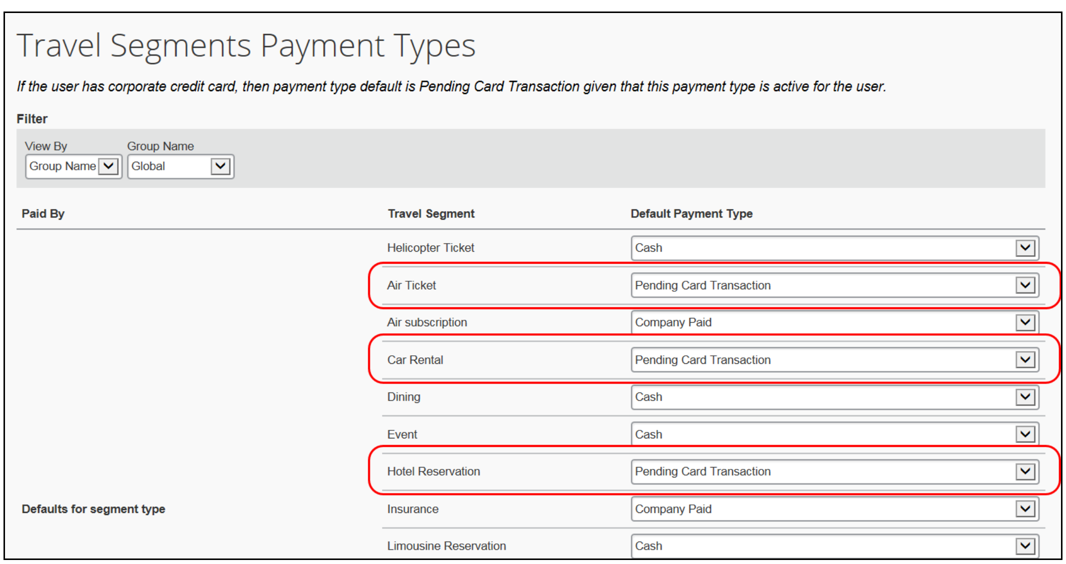


4. Click **Save**.

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.



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

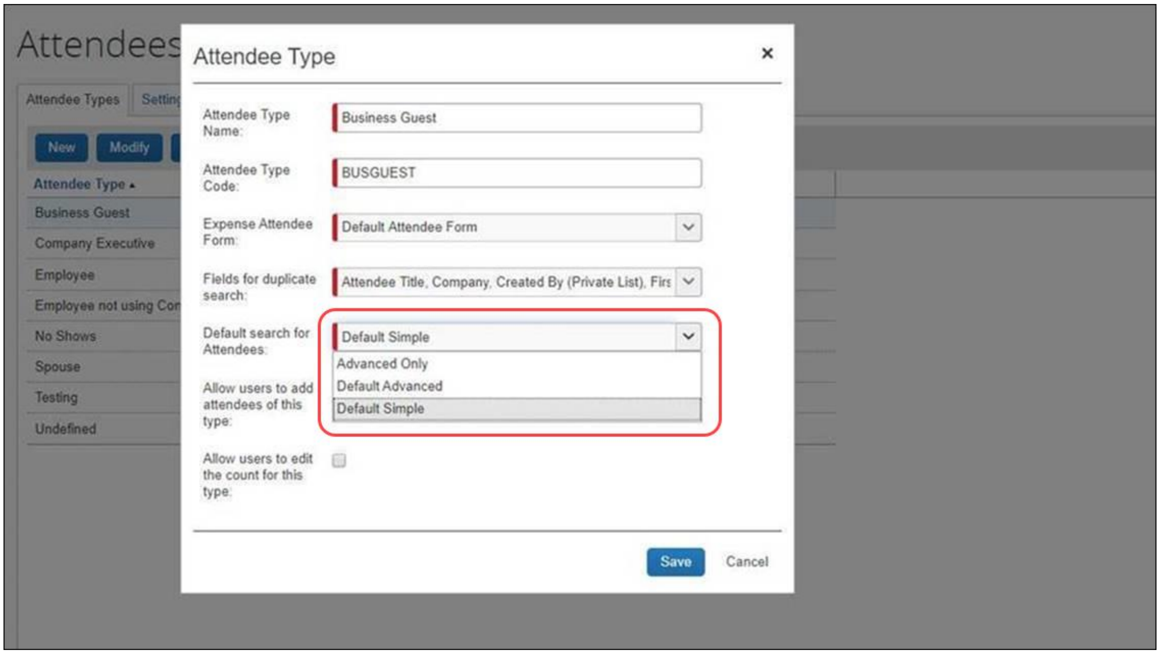
In the NextGen UI for Concur Expense, there are two types of attendee searches – simple search and advanced search. In Concur Expense Professional Edition, you can configure what type of attendee search is displayed for attendee types on the **Attendees** tab on the **Add Attendees** page in the NextGen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