NextGen UI for Concur Expense: Administrators

Transition Guide – Standard 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 1, 2020	Made the following updates: • Updated the *Phased Approach* section. • Added the *Enablement Considerations* section. • Updated content in the *'Image Required' Audit Rules (Special Case)* section.
June 10, 2020	Made the following updates: • Updated the information about new customers in the *Phased Approach* section • Updated the *Early Access / Opt In / Mandatory Move* 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. • 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
August 7, 2018	Changed the timeframes for Early Access period and the Opt-In period
April 9, 2018	Added clarification when previewing for yourself
March 7, 2018	Final version
January 31 2018	Initial publication - ***DRAFT***

NextGen UI for Concur Expense – Administrator Guide

Section 1: About This Guide

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

This administrator guide describes how an admin can enable NextGen UI for themselves 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. SAP has been working to bring these features from the existing UI into the NextGen UI. At this point, all features for the Standard Edition of Concur Expense are available in the NextGen UI with the following exceptions:

- Japan Public Transportation
- Bulk-edit of expenses (updating of multiple expenses at the same time)

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

Existing clients are encouraged transition to the NextGen UI unless you are using the Japan Public Transportation feature, which is not yet supported but will be added in the future. The NextGen UI offers better hotel itemization and many other features to make working with expenses more efficient for your employees.

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 period for existing customers begins after the Limited Access period on July 1, 2020. During this period, admins can turn on or off the NextGen UI by individual user or by their entire organization as often as desired during this period.

Customers should use this period to plan their transition 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 two options available for admins to become familiar with NextGen Expense and to introduce it in the company:

- **For the 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 all users.
- **For the entire company:** The admin can turn on NextGen Expense 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 first time the NextGen UI was enabled for an entity was on July 2, 2020 or later, or if your entity migrated to the unified model 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.

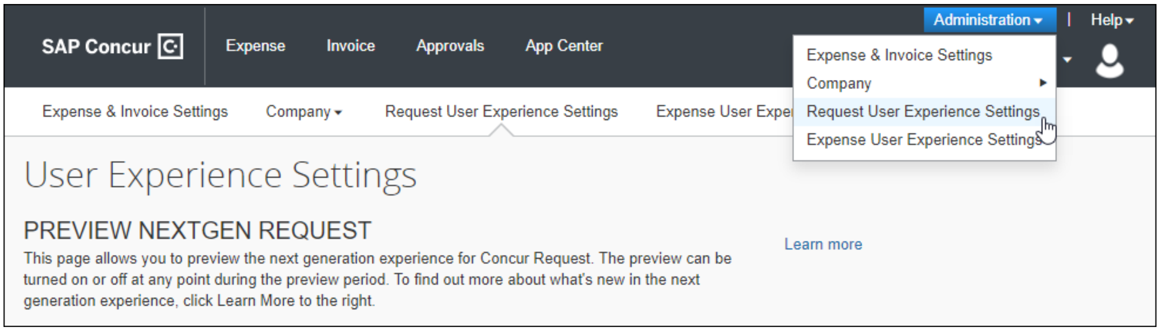
If you enable the NextGen UI for your entity, the NextGen UI will be enabled for both Concur Expense and Concur Request. If you only have Concur Expense or Concur Request, the NextGen UI will only be enabled for the product you have.

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 item 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.

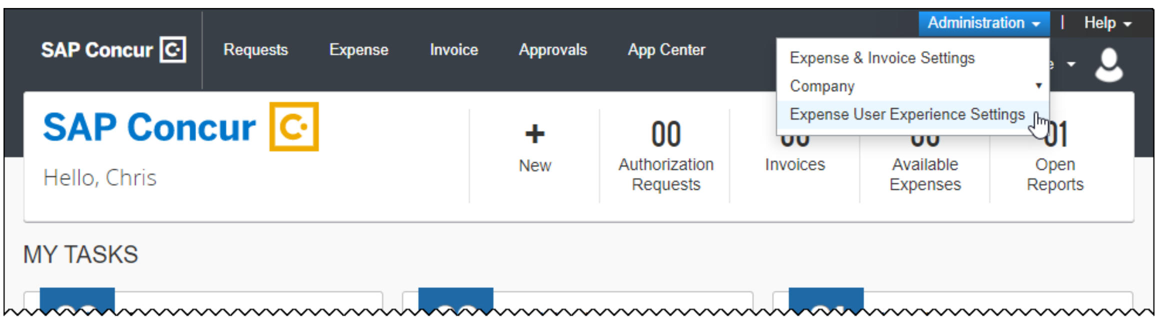
The following is an example of the **Administration > Request > User Experience Settings** page.



Enabling the NextGen UI

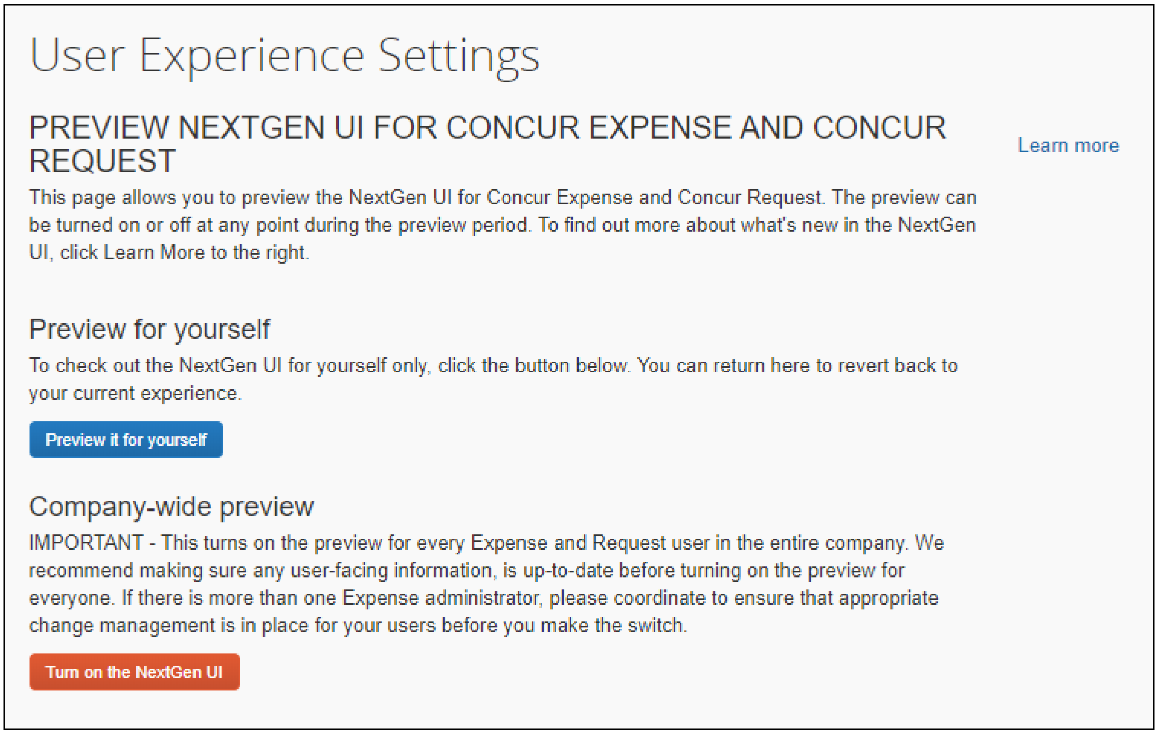
Admins can access the **User Experience Settings** page by clicking **Administration > User Experience Settings**.

NOTE: This option appears for any user with the Can Administer permission.

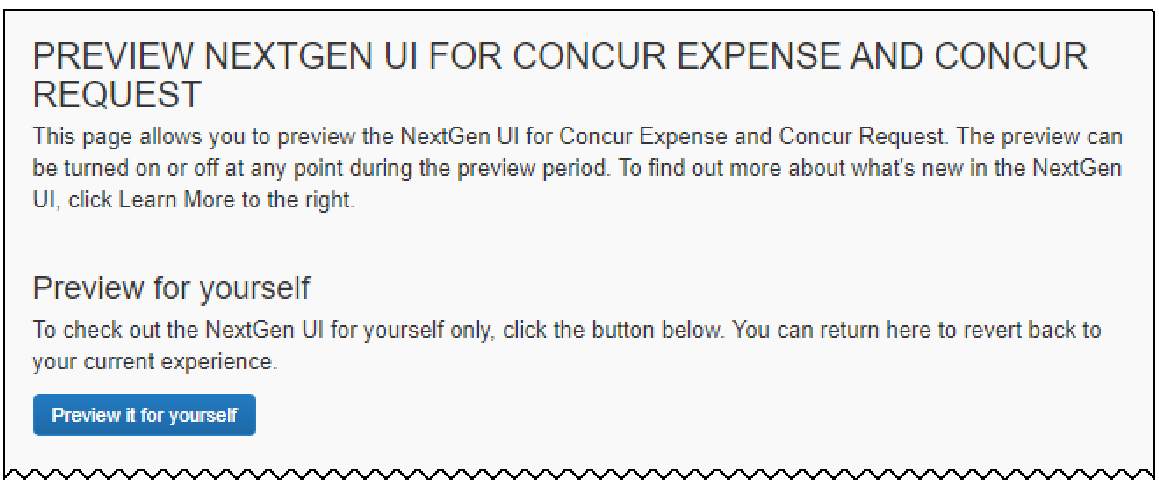


The **User Experience Settings** page appears.

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



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 on behalf of other users.

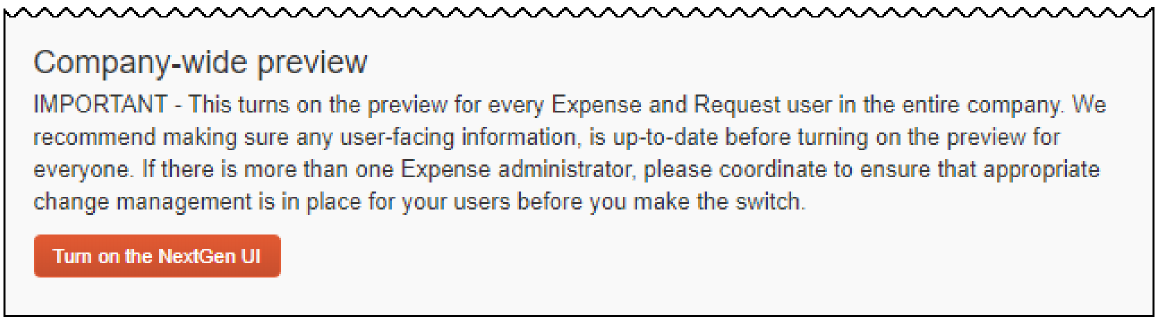
The **Preview it for yourself** button then changes to **Revert to prior experience**. Any time during the review period, the admin can return to the **User Experience Settings** page and click the **Revert to prior experience** button to return to the existing UI.

NOTE: The admin 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 NEXTGEN EXPENSE AND THE EXISTING UI

The admin can switch between the two interfaces using **Preview it for yourself** and **Revert to prior experience** until the entire company has been switched to the NextGen UI. Then, the admin can no longer access the existing UI.

Company-wide preview



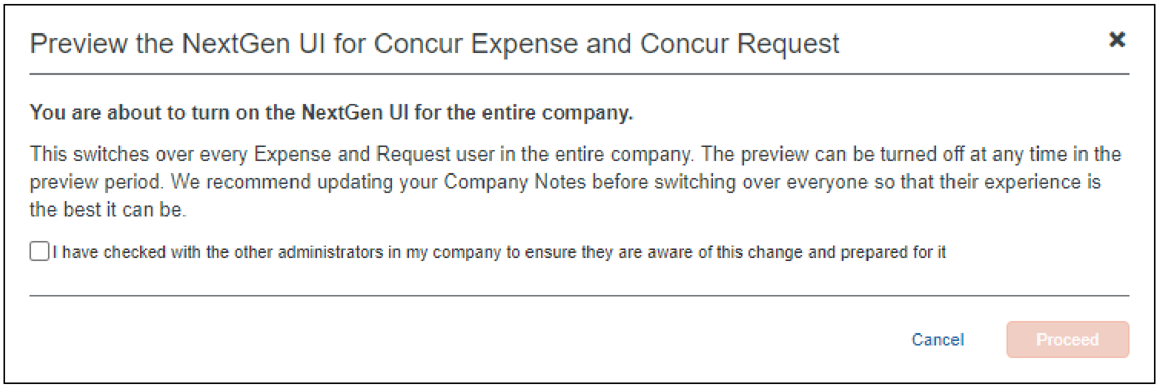
WHY DOES THE ADMIN USE THIS LINK?

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

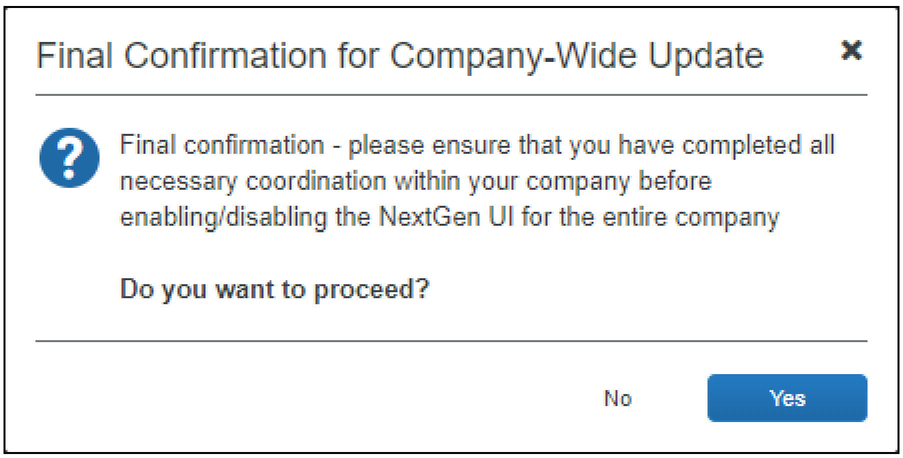
HOW DOES IT WORK?

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** then 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.

IMPORTANT: Switching Between NextGen Expense and the Existing UI

Once the entire company has been switched to the NextGen UI, the admin 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.

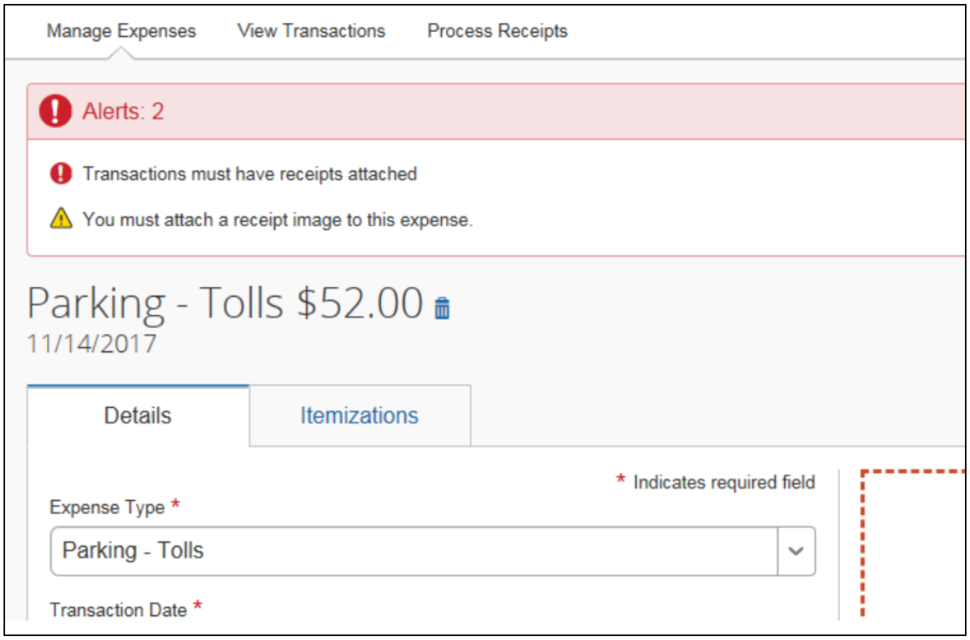
Audit rules related to Travel Diary and configured with this exception code include the following benefits:

- 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 (Special Case)

The following information is applicable only if you are using the Custom Audit Rules feature (which is not a commonly used, best practice configuration) and have configured a custom rule to prevent submission without a receipt image.

In the existing UI, if a receipt is required (as defined on the **Custom Audit Rules** page), an icon appears. In the NextGen UI, there is a message that looks very similar to an audit rule message.



In this example of the NextGen UI, the yellow warning is the standard system-provided information that a receipt image is required (based on Receipt Handling Options). 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, 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.

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.