

Overview – The New Concur User Interface for Creating Expense Reports

SAP Concur 

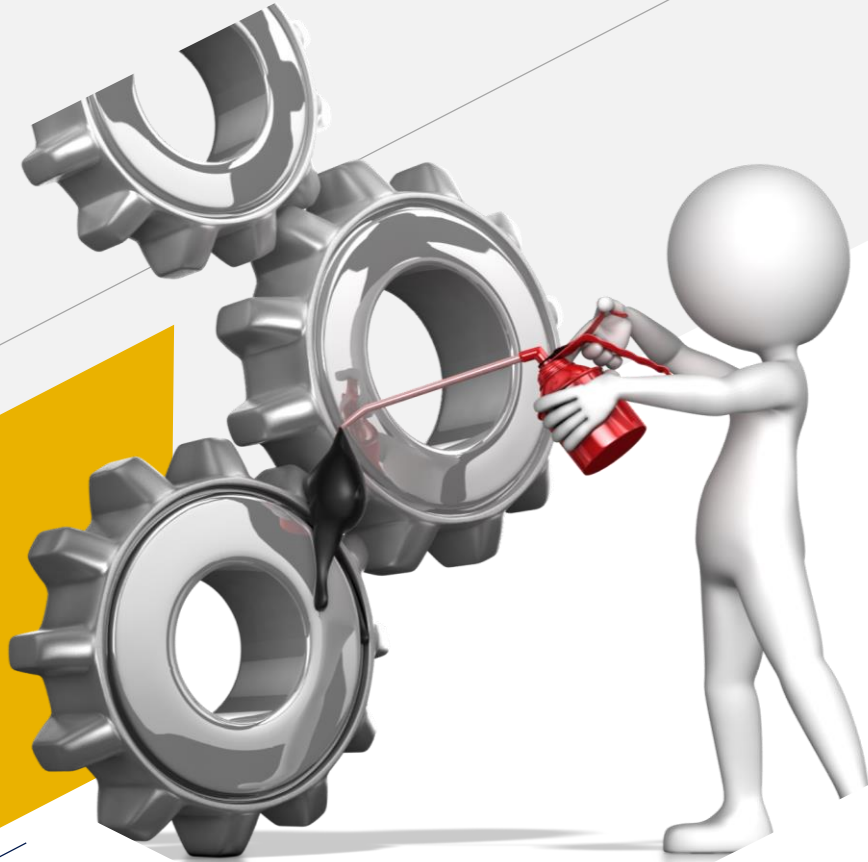
*Presented by: Employee Travel and Reimbursement and the Office of
Education for Research Administration & Finance*

Leading Today's Session

- Barbara Holbrook, ET&R – Functional Owner – Q&A
- Jennifer Earley, ET&R – Functional Owner – Q&A
- Gwen Hall-DiFabio, OERAF – Facilitator
- Kristin Lawrence, OERAF – Session Host
- Megan Tirpak, OERAF – Session Host

Session Purpose

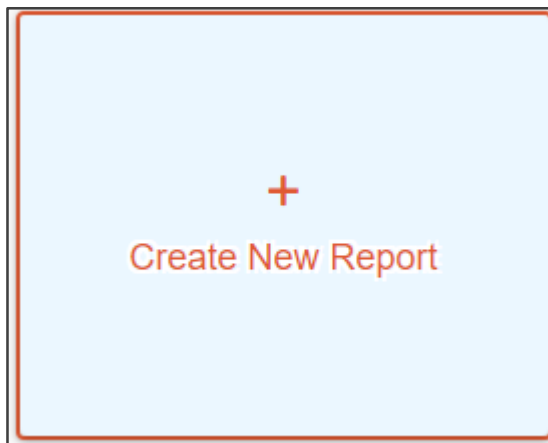
- Examine the new Concur User Interface (UI)
 - Focus will be on key changes
 - Reminders based on Concur FAQs
- Identify Concur roles impacted by new UI
- Define transition plan to new UI



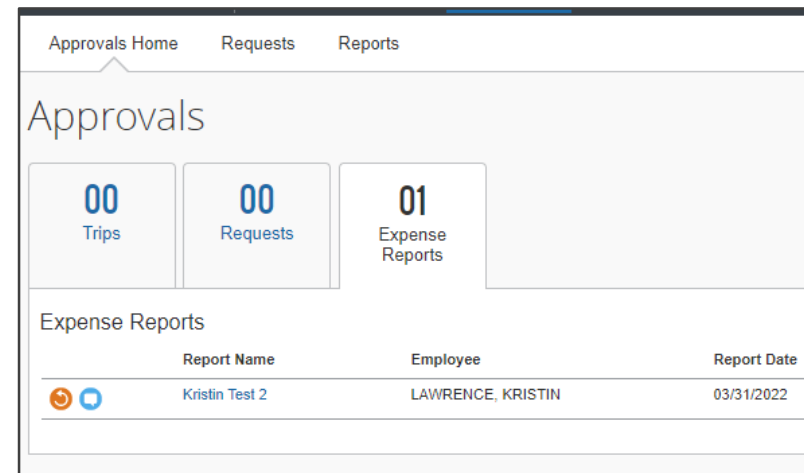
Reminder – Concur is a cloud-based system. Duke has limited ability to configure the system, but doesn't control the system.

New UI Impacts ...

Employees and
Expense Delegates
creating expense
reports.



It *does not* impact
approvers.





Approvals Home Requests Reports

Approvals

00 Trips	00 Requests	01 Expense Reports
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Expense Reports

	Report Name	Employee	Report Date
 	Kristin Test 2	LAWRENCE, KRISTIN	03/31/2022

New UI Impacts...

Unchanged

- Fundamental Functionality
- Profile Set-up
- Expense Delegate Access
- Expense Report Approvals
- Accessing and Executing Report
- Concur Mobile Experience

Changing



- Views for working with Expense Reports
- Report key removed from header – available in the Travel Expense Details Report



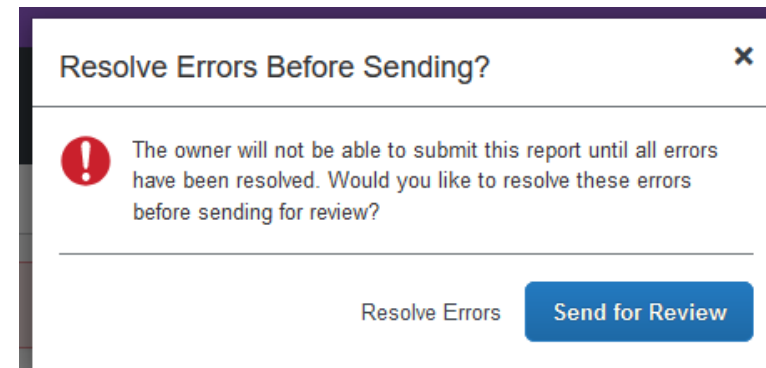
Key Changes

- Task-based windows
 - One task shows on entire screen – improved visibility
- Expense details and receipts
 - Side-by-side viewing – easier to enter/confirm details
- Enhanced visual cues throughout
 - Example – “Notify” becomes “Ready for Review”
- Enhancements to functionality
 - Allocations
 - Itemizations
 - Adding Attendees

The “Hallelujah” Enhancements

- Expense delegates can “pull back” an expense report
 - When employee is notified, but before submission — 
 - When the employee has submitted the report — 

- Notifies expense delegates of hard error messages that trigger when the employee selects “Submit Report”.
 - Primary impact – hard error associated with missing receipts



Let's explore the new UI ...



Reminder – Remember to Bundle!

- Hard cost: Cost per report!
 - Duke pays a fee for each expense report **SUBMITTED** into workflow.
- Soft cost: Administrative Time!
 - Prepare – Employee/expense delegate
 - Submit – Employee
 - Approve – Department Approver
 - Approve – Funding Source Approver – at least one, may be more
 - Processing – ETR
- Travel – Bundle expenses during travel dates; expenses occurring outside travel can be included in separate travel report
- Non-travel – Date range – weekly, bimonthly, monthly – based on volume

Reminder – Remember to Bundle!

In February 2022, an expense delegate submitted 42 different expense reports for an employee. Each report had one expense.



10 Touches



New UI Conversion

- New UI will be available beginning on Monday, May 2.
 - No action is required. New and in-process reports will change to the new UI.
- Communication
 - Posted in Company Notes in Concur
 - ETR will send communication
 - Reminder communication – Week of 4/25
 - New UI is active – May 2

Resources

- [Concur.duke.edu](https://concur.duke.edu)
 - New Quick Reference Guides
 - New demo videos are in progress and will be added over the coming weeks
 - Frequently asked questions will be updated as questions arise
- Point of contact: Employee Travel and Reimbursement
 - Phone – 919-668-3877
 - Email: Concur-ExpenseSupport@duke.edu

App Center

+
Start a Report

+
Enter Reservation

+
Upload Receipts

+
Approvals

COMPANY NOTES


Concur Training Toolkit
This link will provide information to utilise the Concur Expense System.

[KNOW BEFORE YOU GO](#)

MY TASKS

00 Required Approvals →

Great! You currently have no approvals.



04 Available Expenses →

06/17	Cartf Banc Aire	EUR 54.60
11/18	Fabulous Market	\$11.43
10/24	HILTON	\$874.73
07/23	Fuel	\$101.48

09/0

Thank you!