Overview – The New Concur User Interface for Creating Expense Reports

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.
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.
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
  • 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
Thank you!