Concur New User Interface

UL Meeting
February 18, 2015
Overview

• Procurement Services has been working with Concur in order to improve the usability experience based on the feedback received from the University community
• Concur has launched a new User Interface in order to improve the usability experience of the users and the interface was piloted with a group of users
• Pilot feedback was positive and helped to identify some challenges related to the new interface
• The University community was switched to the new user interface at end of January 2015
• Concur will be releasing next phase of improvements in spring/summer of 2015
Getting started

• New user interface offers easier and more intuitive navigation
• Home and Expense pages are redesigned and easier to use
• True dashboard experience with ‘work to zero’ focus
We're excited to show you what we've done

We've made quite a few changes to make your key tasks easier - making you more efficient. Take a short tour and learn what's new.

- Show me tips next time
- Let's get started!

UNIVERSITY OF MICHIGAN RESOURCES

Find out more about the U-M Travel and Expense System, look up answers for Concur FAQs, and review Concur Best Practices. Access Concur Training & Resources - (Click Start to view all Concur training and resources in a single page).

For system navigation help contact 4HELP@umich.edu - 734.764.4357 (4-HELP)
For answers to policy questions contact procurement.services@umich.edu - 734.764.8212, opt 1
Homepage Cont’d

• Key actions are highlighted at the top of the screen
• ‘Work to Zero’ – Know at a glance what work needs to be done
• All approvals are easier to access and are located in one area for better accessibility
• Detailed steps are displayed in a logical order to help simplify the booking process
• The enhanced Trip Summary clearly shows users where they are in the process
Expense landing page

Active Reports

NOT SUBMITTED

scott

$100.00

NOT SUBMITTED

scott

$0.00

Available Expenses

Available Receipts

Upload New Receipt

Drag expenses on the report
Expense landing page Cont’d

• Key actions and notifications are clear and easy to find
• Everything users need to manage expenses is located on a single screen
• Improved management of available expenses allows faster report creation
• Drag-and-drop of expenses on report is now available
• Receipts and related details appear on the same page, allowing more efficient matching to reports
Pilot Feedback

• Home page is better organized and provides visibility into what needs to be done
• Colored title bars on expense reports makes it easier to distinguish between different reports status
• Seeing all the receipts on expense pages serves as a reminder that more reports need to be created
• Navigation is much improved and easier to follow
Pilot Feedback *Cont’d*

- Missing functionality for reviewers to be able to review reports before approver approves them
- Some users have reported difficulty viewing screen because of the very white background and smaller fonts
- Actual expense report creation is still the same as in the older User Interface
Training and Resources

• Procurement Services website has been updated to announce the new user interface changes
• Concur homepage has been updated to announce the upcoming switch to the new user interface
Next Steps Cont’d

• Procurement Services will start planning for the next round of enhancements scheduled to be released around spring/summer of 2015

• Procurement Services is also working on releasing the mobile app to campus as well as evaluating other apps which will improve the usability experience