Subject: New Concur Look Coming in January 2015

A new look is coming to the Concur travel and expense management application, scheduled to go live on January 20, 2015. The new, more intuitive interface will have an updated look and feel, with enhancements to workflow processes, a new dashboard feature, and improved navigation. There are no backend or system processing changes.

Who Is Affected?

All faculty, staff, and students who use Concur to create, submit, or approve expense reports or book travel will be affected.

What Will Change?

Changes will include:

- Enhanced Home, Travel Booking, and Expense pages with improved navigation and a modern consumer-based application look and feel
- A streamlined travel booking workflow process and summary
- Consistent Travel and Expense terminology and iconography
- A dashboard design with logical grouping of similar functions and tasks to minimize the number of pop-ups or pages required to complete a specified task
- A facts and stats section with key metrics and other helpful information
- Actions, alerts, and notifications that are clearly defined and visible
- Vastly improved smart matching of expenses and receipts as a result of combining key functions on the same page
- New “Work to Zero” feature that clearly shows the number of outstanding tasks at the top of the page so users will see all at a glance and can resolve accordingly, which improves management of tasks

No Required Training

After a review of the new interface, it was determined that existing Concur users will not be required to complete any transition training. Existing training materials on Knowledge Link will be updated prior to rollout of the new interface (Concur Expense Approver Knowledge Building and Concur Expense Approver Application Training). Users may retake training optionally. Numerous demo sessions will be held across campus starting in early January to introduce users, delegates, and approvers to the new interface. See the Project website for updates at https://cms.business-services.upenn.edu/penntravel/training-manuals/newui.html.

No Change to System Access

Access to Concur will remain the same as before at https://medley.isc-seo.upenn.edu/authentication/profile/concur?app=concurprod. You will need your PennKey and Password to log in.
End-User Support

There will be no changes to end-user support. You may continue to use the current process for questions or assistance:

- Central support is available at 6-HELP, 215-746-4357. Select Option 3 for Concur, then 1 for Travel or 2 for Expense.
- To submit a help request via e-mail, contact temsupp@exchange.upenn.edu.

Reference Materials and New Interface Demo Sessions

Updated reference materials, including Concur instructional guides, how-to videos, and Travel and Expense FAQs, will be available when the new interface is launched on January 20. “Noted Differences” documents, which highlight the key new features and changes, will be made available prior to the changeover. In addition, numerous demo sessions will be held across campus starting in early January to introduce users, delegates, and approvers to the new interface.

For more information on the new interface, or to preview updated reference materials, see the Project website at https://cms.business-services.upenn.edu/penntravel/training-manuals/newui.html.

Questions

More information about the Concur interface redesign will be provided as rollout approaches. If you have any questions, comments, or suggestions, please send an e-mail to temsupp@exchange.upenn.edu. For general information on Concur, please visit the Penn TEM web site at http://cms.business-services.upenn.edu/penntravel/.