Rensselaer Polytechnic Institute
Concur User Interface Transition Guide

This training document is intended to help develop familiarity with the new Concur User Interface (UI) by providing an overview of the changes and highlighting improvements to the platform. We are providing this guide as a supplement to our scheduled training programs in advance of a full release to campus in January 2015.

Some improvements include easier access to features and faster “Work to Zero” task lists. This new approach provides you with immediate visibility into outstanding tasks and means fewer steps for you to complete the tasks you need to get done!

Redesigned Home Page
The new Quick Task Bar gives users quick access to their most important tasks.

- The user clicks a task for quick access to the associated page. For example, when the user clicks the **Open Reports** task, the page listing the user's expense reports appears.
- The user also has 18 available expenses. (*Available Expenses is the new name for Smart Expenses* – card charges, receipt images, e-receipts that can be used to create or attach to expense entries.)
- The **New** task provides one or more additional options. The user hovers the mouse pointer over **New** to start a new report, new cash advance, new request, etc. The options that appear depend on the user’s roles/permissions.
My Tasks

Home Function

Users can now click the Concur logo to return home from any section.
Expense Page

Current:

![Expense Page Screenshot]

New:

![Expense Page Screenshot]

This page shows the user’s active reports and available expenses and receipts. Reports are displayed as individual ‘tiles’ on the screen.

**All reports:** To the right of the tiles is the All reports link. The user clicks this link to see all reports – active, paid, etc.

**New:** To create a new report, the user clicks Create New Report.

**Available Expenses:** Available expenses (formerly known as Smart Expenses) appear at the bottom of the page. The user can add them to an expense report.

**Available Receipts:** Available receipts appear at the bottom of the page. The user can attach them to an expense.
The Approvals page contains all items that require the user's approval, such as trips, requests, reports, and cash advances.
Welcome to Concur Travel & Expense!

Do You Want to By-Pass the Counter When Renting a Car - Read This!

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why not change the world?
Updated look and feel. Functionality remains the same.
Most things match up from the current version. The profile (and delegate functionality) is in the ‘Profile’ drop-down. The link to contact Concur Support is now under ‘Help’.
Delegate/Proxy Functionality

Profile settings, sign out, and administer for another user (for the delegate, proxy, travel assistant/arranger) have been moved to the Profile menu.

- If the delegate has 10 or less users, then they appear in a drop list. If there are more than 10, then the user enters the first few letters of the desired user's name and selects from the search results.
- This section is used by delegates, proxies, and travel arrangers. If a user has more than one of these roles, the user selects the appropriate option.
Individual Profile Maintenance

Click in ‘Profile’ drop-down and select ‘Profile Settings’
This section has become monochromatic. Users should pay attention now that icons are similar in color and appearance.