



UNIVERSITY OF SOUTH ALABAMA

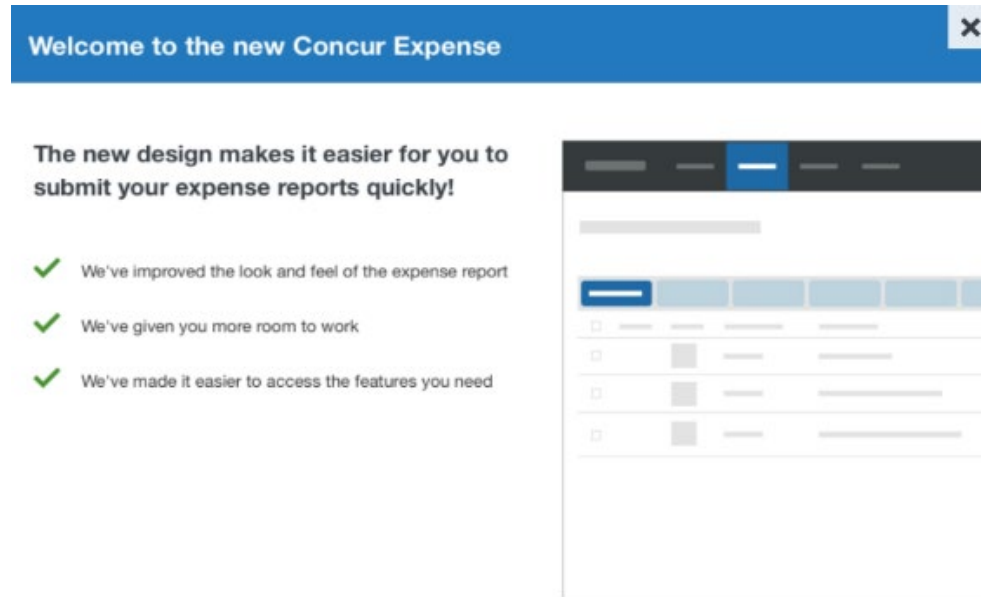
Concur NextGen Expense

Introduction

Visual Highlights

Next Generation Expense - Intro

We are pleased to announce the Next Generation Expense User Interface (NextGen Expense) – a new interface for Concur Expense end users coming 2022. NextGen Expense provides an intuitive, integrated, efficient experience. When users first enter NextGen Expense, a Welcome screen appears.



The following pages provide illustrative comparisons between the current interface and NextGen.

Next Generation Expense - Intro

Expense Tab:

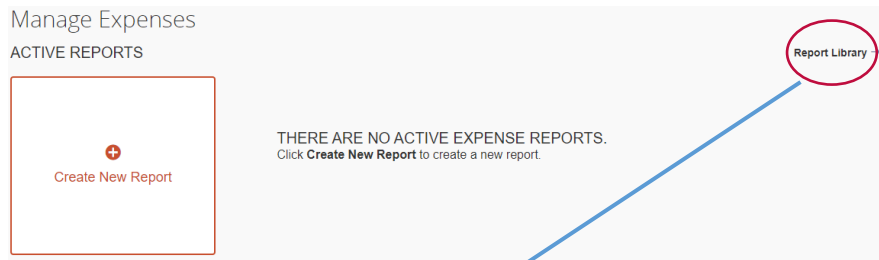
When you click the **Expense** tab, the **Manage Expenses** page appears. It looks very much like the existing user interface. It has three sections – all of which are described on the following pages:

- Report Library
- Available Expenses
- Available Receipts

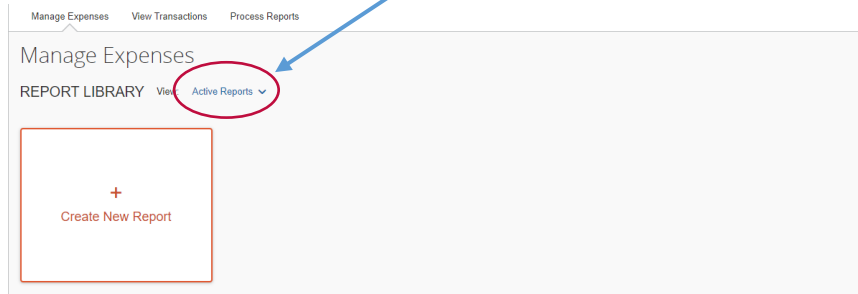
At the top of the **Manage Expenses** page is the **Report Library** section.

Report Library

Current



NextGen



In the existing UI, your active reports are automatically visible. To see other reports, click **Report Library**.

In NextGen Expense, your active reports and the library are combined so all reports are available on one page. The active reports appear by default, but you can easily view other reports. From the **View** list, select one of the predefined options or define a custom date range.

Next Generation Expense - Intro

Creating a Report

Just as before, typically when you create a new expense report, you start with the general report-specific page (also known as the report *header*) and then move to the expense page to add the expenses and attach any required receipt images. Though this basic process has not changed, the pages are more streamlined and easier to manage. In virtually all cases, when working with expenses:

- The fields are larger and easier to navigate.
- Required fields are now marked with a red asterisk instead of a red band at the left edge of the field.

In NextGen Expense, the header page is called **Create New Report**. The fields are larger and easier to navigate.

Current

Create a New Expense Report

Report Header

Report Type
*USA-TEST Travel Policy

Report Name

NextGen

Create New Report

[Create From an Approved Request](#)

Create New Report

[Create From an Approved Request](#)

Report Type *
*USA - Travel Policy

Report Name *

Next Generation Expense - Intro

Available Expenses

The **Available Expenses** section is located in the middle of the **Manage Expenses** page.

Current

AVAILABLE EXPENSES

All Cards Move Match Unmatch Delete

<input type="checkbox"/> Expense Detail	Expense Type	Source	Date	Amount
<input type="checkbox"/> Wholesale Clubs Mobile	Office Supplies		04/16/2016	\$10.63
<input type="checkbox"/> Transportation Services, Not els Mobile	Postage		04/16/2016	\$96.30

NextGen

AVAILABLE EXPENSES View: All Expenses

Delete Combine Expenses Move to

<input type="checkbox"/> Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	USA-Hancock University Paid	Airfare	AGENT FEE 0067735096646	01/05/2022	\$18.00
<input type="checkbox"/>	USA-Hancock University Paid	Airfare	DELTA AIR 0067735096646 Omaha, Nebraska	01/05/2022	\$309.21
<input type="checkbox"/>	USA-Hancock University Paid	Airfare	DELTA AIR 0067735096646 Omaha, Nebraska	01/05/2022	-\$-309.21

In NextGen Expense, there are a few changes to this table:

- The **Receipt** column has been added to help you easily scan the list for items needing a receipt. You can sort (by clicking the column heading) to bring these to the top for action. The thumbnail image in the **Receipt** column indicates that the expense has an image attached.
- The **Source** column has been replaced with the **Payment Type** column to help you quickly scan for the expenses that have card information attached (so they are ready to be submitted) and which are still waiting for additional source information to arrive.
- In the **Amount** column, *Estimated* appears for hotel and car itinerary amounts. *Estimated* indicates that the actual amount is unknown, since the itinerary likely does not include other taxes, fees, etc. that will appear in the final card charge.

To filter the results, select an option in the **View** list.

Next Generation Expense - Intro

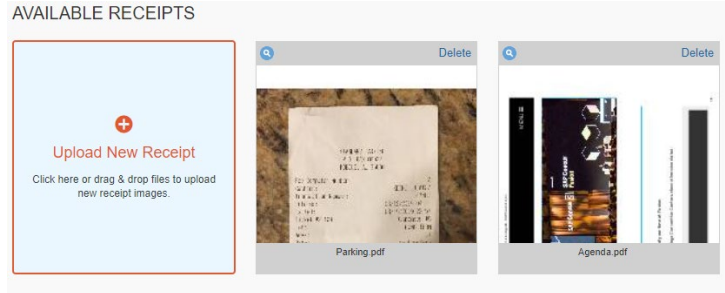
Available Receipts

The **Available Receipts** section is located at the bottom of the **Manage Expenses** page.

In NextGen Expense, the look and feel is similar. Click a receipt image to view it. You can zoom, rotate, and delete the image.

Current

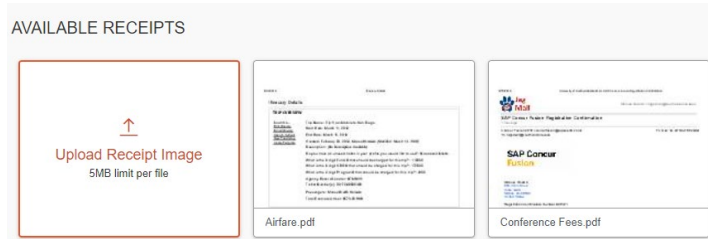
AVAILABLE RECEIPTS



The 'Current' interface features a light blue background. On the left is a large square button with a red plus sign and the text 'Upload New Receipt' and 'Click here or drag & drop files to upload new receipt images.' To the right are two receipt thumbnails. The first is a parking receipt with the text 'Parking.pdf' below it. The second is a document with a dark cover and the text 'Agenda.pdf' below it. Both thumbnails have a magnifying glass icon and a 'Delete' button in the top right corner.

NextGen

AVAILABLE RECEIPTS



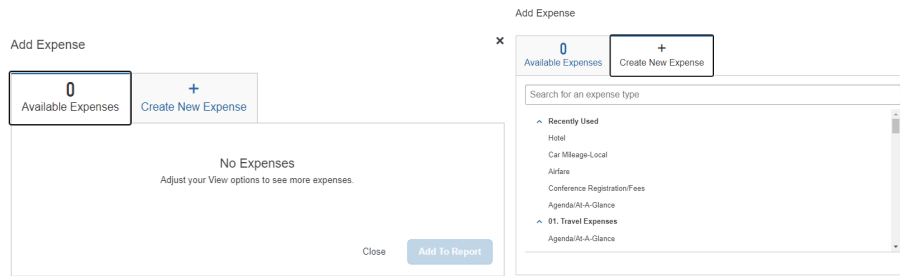
The 'NextGen' interface features a light gray background. On the left is a large square button with an upward arrow and the text 'Upload Receipt Image' and '5MB limit per file'. To the right are two receipt thumbnails. The first is a document with the text 'Airfare.pdf' below it. The second is a document with the SAP Concur logo and the text 'Conference Fees.pdf' below it. Both thumbnails have a magnifying glass icon and a 'Delete' button in the top right corner.

Next Generation Expense - Intro

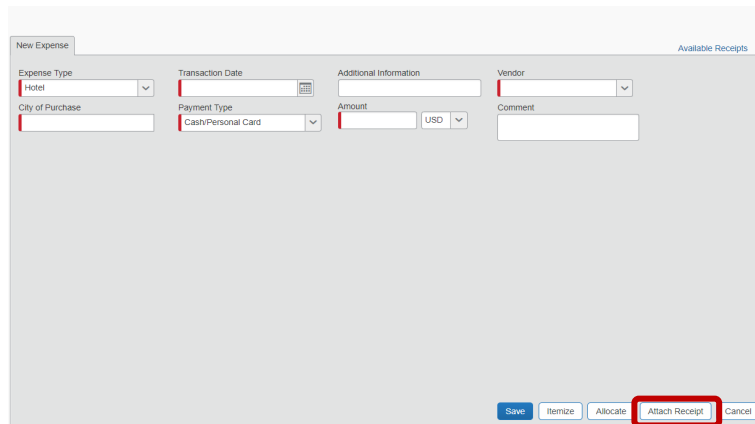
The Report:

New Expense

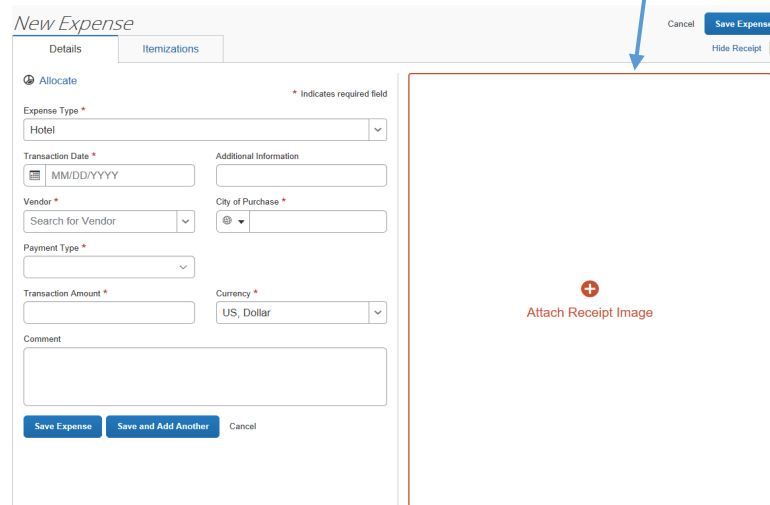
To get started in NextGen, click **Add Expense**. The **Add Expense** window appears; all of the options for adding expenses to the report are available in this window. The default choice is to add items from your Available Expenses library, to encourage you to use those expenses first before creating a new expense – which helps reduce duplicate entries.



Current



NextGen



Next Generation Expense - Intro

Report Window

In NextGen Expense, the report page is cleaner and has fewer "sections" – making the page easier to navigate.

Current

The 'Current' interface shows a report titled 'Testing' with a total amount of \$800.00 and a total requested amount of \$800.00. The table below shows the expense details:

Date	Expense Type	Amount	Requested
11/27/2018	Hotel Sheraton, Dallas, Texas	\$800.00	\$800.00
		TOTAL AMOUNT	TOTAL REQUESTED
		\$800.00	\$800.00

The sidebar on the right lists 'Recently Used Expense Types' and 'All Expense Types'. The 'All Expense Types' are categorized as follows:

- 01. Travel Expenses**
 - Agenda/A-A-Glance
 - Hotel
 - Hotel Group
 - Outside Funding
 - Per Diem-In State (one overnight stay) \$85.00/day
 - Per Diem-In State (two or more nights) \$100.00/day
 - Per Diem-In State 12-hrs (No Overnight) \$34.00
 - Per Diem-In State 6-12 hrs \$12.75
 - Per Diem-In-State 12+ hrs (No Overnight) \$34.00 (Bus Drivers)
 - Per Diem-In-State 6-12 hrs \$12.75 (Bus Drivers)
 - Personal Funding
 - Supporting Documentation
 - Team/Group Travel
- 02. Transportation**
- ..02. Individual Meals**
 - Lunch
 - Meals-Daily
- 04. Meals & Entertainment**
 - Group Meals/Entertainment
 - Guest Meals
- 05. Office Expenses**
 - Courier/Shipping/Freight
 - Office Supplies
 - Postage
 - Printing/Photocopying/Stationery
 - Repairs/Maintenance
- 06. Communications**
 - Internet/Online Fees
 - Telephone/Fax

NextGen

The 'NextGen' interface features a clean header with navigation tabs: SAP Concur, Requests, Travel, **Expense**, Invoice, Approvals, Reporting, and App Center. The main report area displays 'December 2021 \$800.00' with 'Not Submitted' status. Action buttons include 'Copy Report' and 'Submit Report'. Below the report title, there are tabs for 'Report Details', 'Print/Share', and 'Manage Receipts'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main table lists the expense details:

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Cash/Personal Card	Hotel	Hilton Hotels Orlando, Florida	01/13/2022	\$800.00
					\$800.00