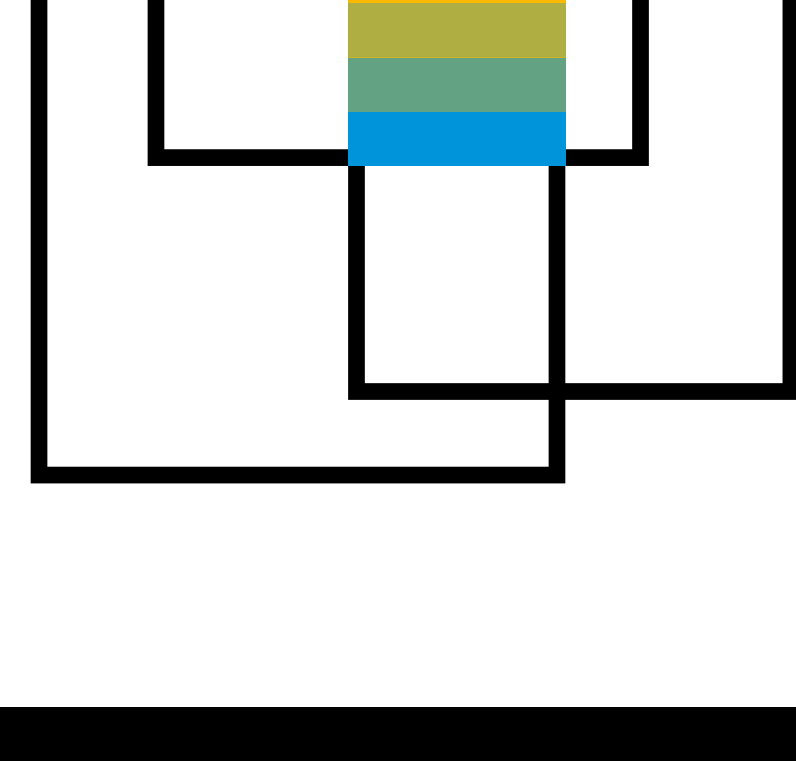
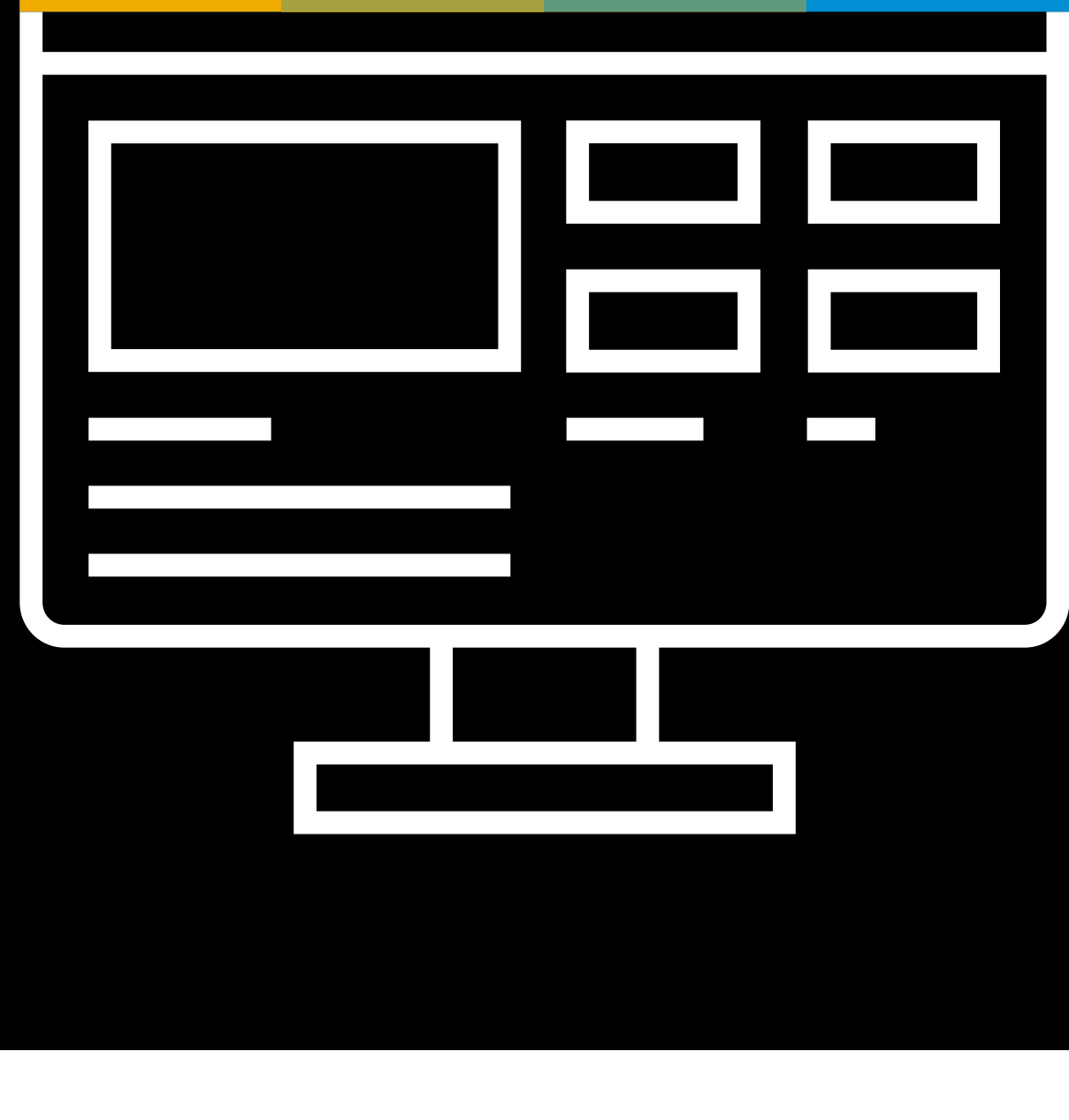
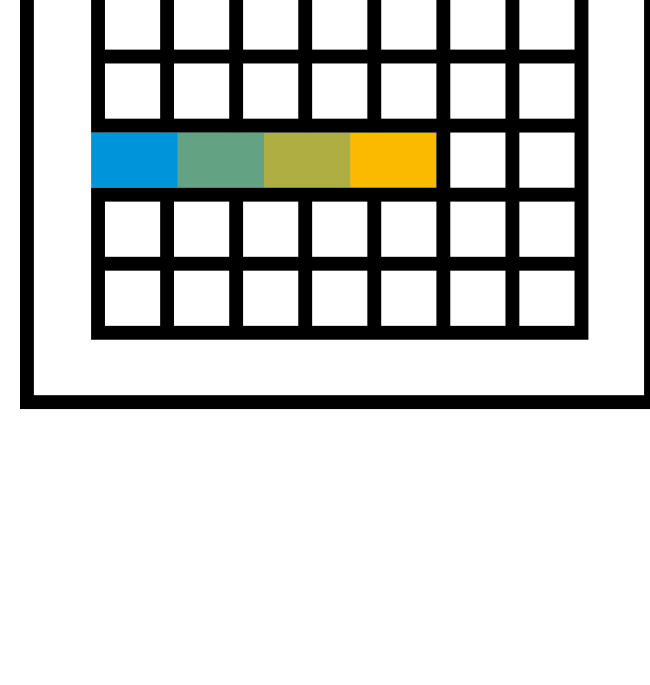


# Seven Steps to Migrating to the SAP Concur NextGen UI



SAP Concur solutions make spend management easy – and with the **NextGen UI** we've simplified and streamlined the user experience even further. As our solutions grow and evolve, so does your business, and managing change is crucial to reaping the maximum business benefits.

To keep your spending goals in sight and on track, we recommend migrating to the **NextGen Concur Expense** without delay. In this infographic we'll tell you why you need to act now and how to successfully manage this change.

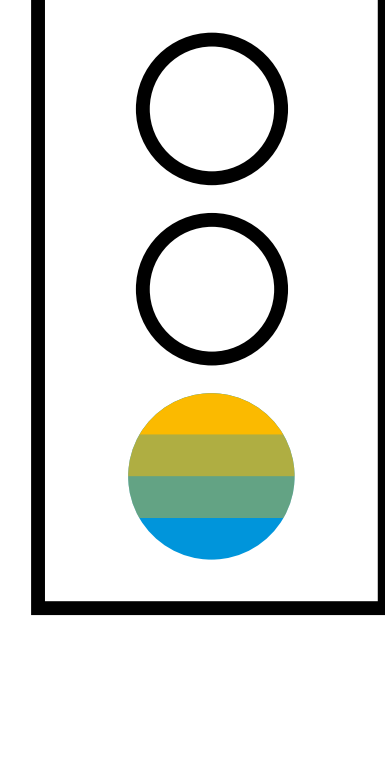


## Why now?

- By October 1, 2022 all customers will automatically be moved over
- Over 1000 customers have already updated
- The sooner you plan this move, the faster your users will benefit

## Ready, Steady, Go: The Benefits

Prepare for change today to keep your business objectives on track tomorrow. You'll immediately see the following benefits:



**Employee experience:** A more intuitive, guided experience = happier, more productive employees.

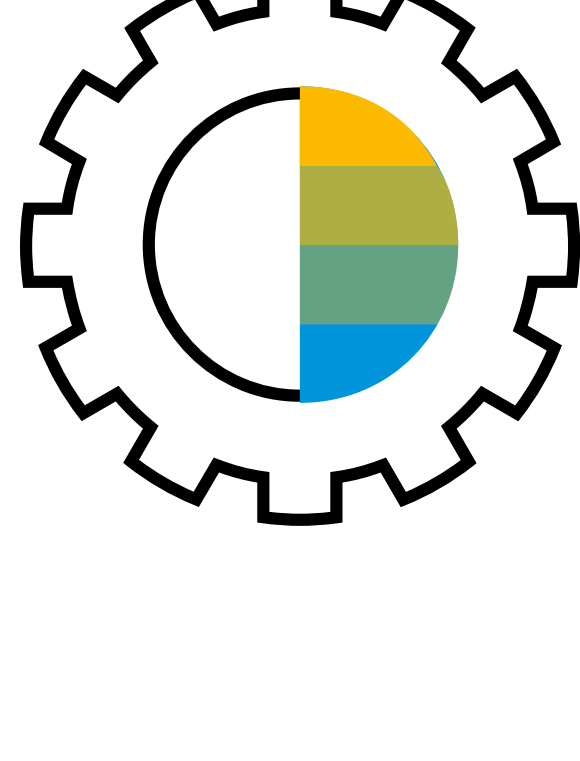
**Innovation:** Our thoughtfully designed new features and enhancements = increased spend management.

**Accessibility:** An inclusive approach using the SAP Accessibility Standard = no one misses out.

## New Features

The **NextGen UI** makes it simpler for the end user, and specifically for first-time users or infrequent users.

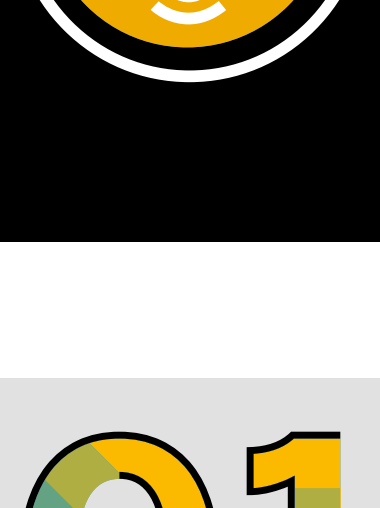
Some of the main **benefits** are:



- ✓ Automatic creation of an expense report from an approved request
- ✓ Active reports and the library are combined so all reports are available
- ✓ Users can attach one receipt image to more than one expense on the same expense report (Professional Edition only)
- ✓ User onboarding screens for trip-based Expense Assistant
- ✓ Hotel itemisation wizard improvements
- ✓ New Travel Allowance service (initially for net-new Travel Allowance customers only)
- ✓ Company Bill Statements offers greater visibility and clarity on tasks

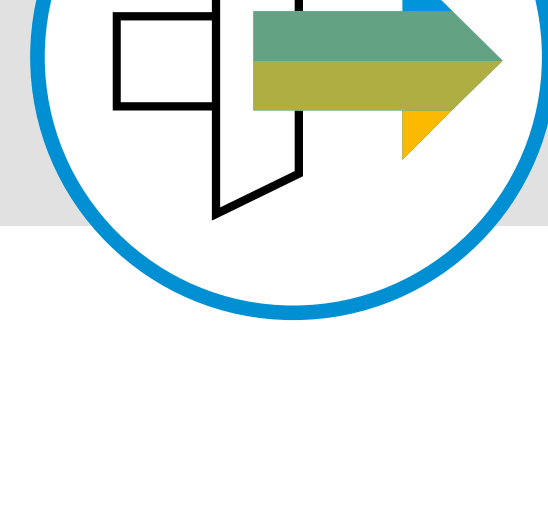
## Over To You: Your Seven Step Change Management Plan

Change is here – we just need you to climb onboard. We've created these seven easy steps for a seamless and successful transition.



**Important!** Work backwards from the ultimate October 1, 2022 deadline and allow yourself months, not weeks, to ensure a seamless process.

### 01 Identify Impact



- Familiarise yourself with the changes and who they will impact
- Meet up with decision makers
- Communicate the changes and answer any questions

**Tip:** If you have both Concur Expense and Concur Request you will have to upgrade to both at the same time because many feature and screens are shared.

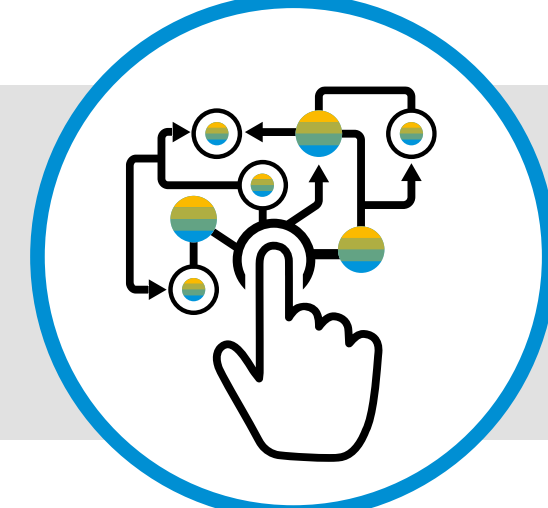
### 02 Build Your Team



- Meet regularly with IT, training teams, communication leaders, helpdesk, auditors and executives
- Agree an approach that aligns with company culture
- Plan your rollout according to geography, challenges and roles

**Tip:** Identify what else is happening in your organisation which might impact the changeover and consider coordinating change events.

### 03 Test Test Test



- Set clear timelines and flag up important milestones
- Consider running pilots or test groups with key audiences
- Establish any potential obstacles to equip you with answers to common issues

**Tip:** There will be no impact to data or transactions; only the UI used to access that data has changed.

### 04 Deliver Training



- Plan for pre-, during and post-deployment training, whether that's instructor-led or self-paced
- Mine your pilot groups for potential pain points
- Think about your audience needs and preferences when deciding formats (PDFS, forums etc.)

**Tip:** The new UI only applies to the solutions on the web (not mobile), irrespective of edition (Professional or Standard).

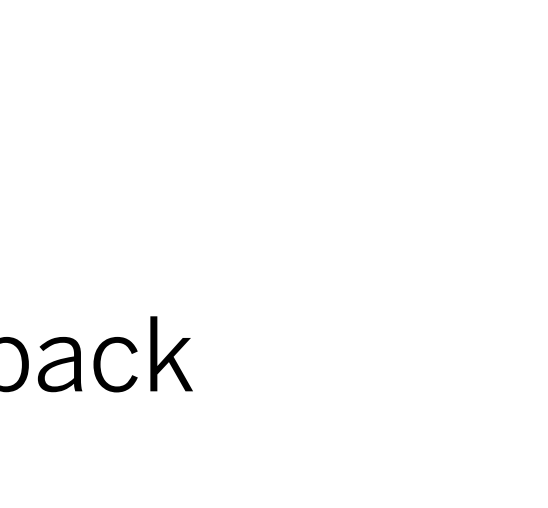
### 05 Talk to Everyone



- Communicate change positively and realistically
- Ensure you are specific to each audience group's needs across email, portals, newsletters, website and webinars etc.
- Users will have questions – open the gateways and allow feedback

**Tip:** The first time the user visits the home page in the updated UI, the user will see a three-slide product tour.

### 06 Measure Success



- Identify targets and metrics – what does success look like?
- Use surveys to gauge progress and success
- Measure adoption rates, time savings, help requests and user satisfaction

**Tip:** The first phase of the UI change is focused on users – additional phases to include approver and processor screens are planned.

### 07 Offer Help



- Make helpdesk, on-site IT and training teams available to users
- Prepare these teams with additional training
- Give users a choice of support options depending on their needs

**Tip:** The User Assistance Tool helps drive user adoption by supporting the onboarding process as well as increasing productivity for users.

## Need More Help?

With these seven action points on the table, you can safely and confidently begin your journey to the **NextGen UI for Concur Expense** whilst minimising disruption, maximising uptake and measuring success for even greater improvements in the future. And don't forget these steps can be applied to other areas of your business undergoing change.

For further support check out our [training toolkit](#) and if you have any questions please reach out on the [SAP Concur Community](#).