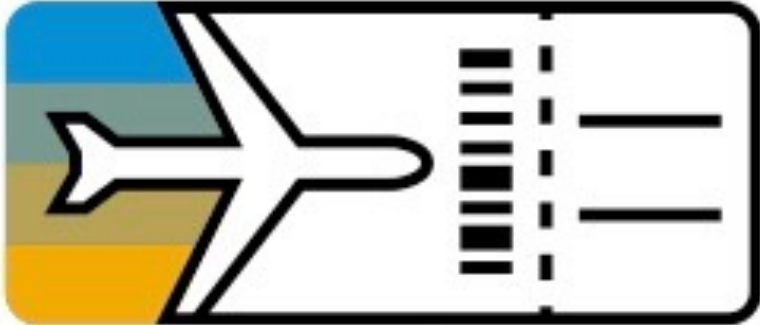


REQUEST REDESIGN

By Alexandr Barsuk

SAP Concur 



LEGACY UI

CONCUR | Requests | Travel | Expense | Invoice | Approvals | Administration | Profile

Manage Requests | Create New | Process Requests | Quick Search | Budget Insight | Purchase Requests

Request 337K

Request Name: Dinner with a client in NY
Purpose: This is an important client and a huge deal is on the line.

Cancel Save Attachments Print / Email Delete Request Status

Request Header Segments Expenses Approval Flow Audit Trail

Request Name: Dinner with a client in NY
Request Policy: Cash Advance Request Policy
Start Date: 01/06/2015
End Date: 01/06/2015

Purpose: This is an important client and a huge deal is on the line.
Comment:

Cash Advance (2)

Cash Advance Amount: 350.00 USD
Cash Advance Comment:

Cash Advance Amount: 300.00 EUR
Amount in USD: \$358.26
Cash Advance Comment: This is dinner with the original client's partner. Also of grave importance to the deal.

CONCUR | Requests | Travel | Expense | Invoice | Approvals | Administration | Help | Profile

Manage Requests | Create New | Process Requests | Quick Search | Budget Insight | Purchase Requests

Request 337H

Request Name: Trip to New York
Purpose: Travel Industry Conference

Attachments Print / Email Delete Request Submit Request Status: Not Submitted

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment
Click icon to create segment

Air Ticket Round Trip One Way Amount: 540.00 USD

Outbound
From: Seattle Tacoma Intl Arpt (SEA), Seattle, WA, United States
To: John F Kennedy Intl (JFK), New York, NY, United States of
Date: 03/10/2015 Depart at: 08:00 am
Comment:

Return
Date: 03/17/2015 Depart at: 06:00 pm
Comment:

Save Cancel

EARLY USABILITY TEST RESULTS

How Are We Doing?



VISION

Deliver a much improved user experience for Request users through simpler IA & UI, and smoother integration with Travel, Expense, and Invoice products.

DESIGN PRINCIPLES

Clean and simple UI

Seamless

Focus on essentials

Details matter

Delightful

PERSONAS

Requestor

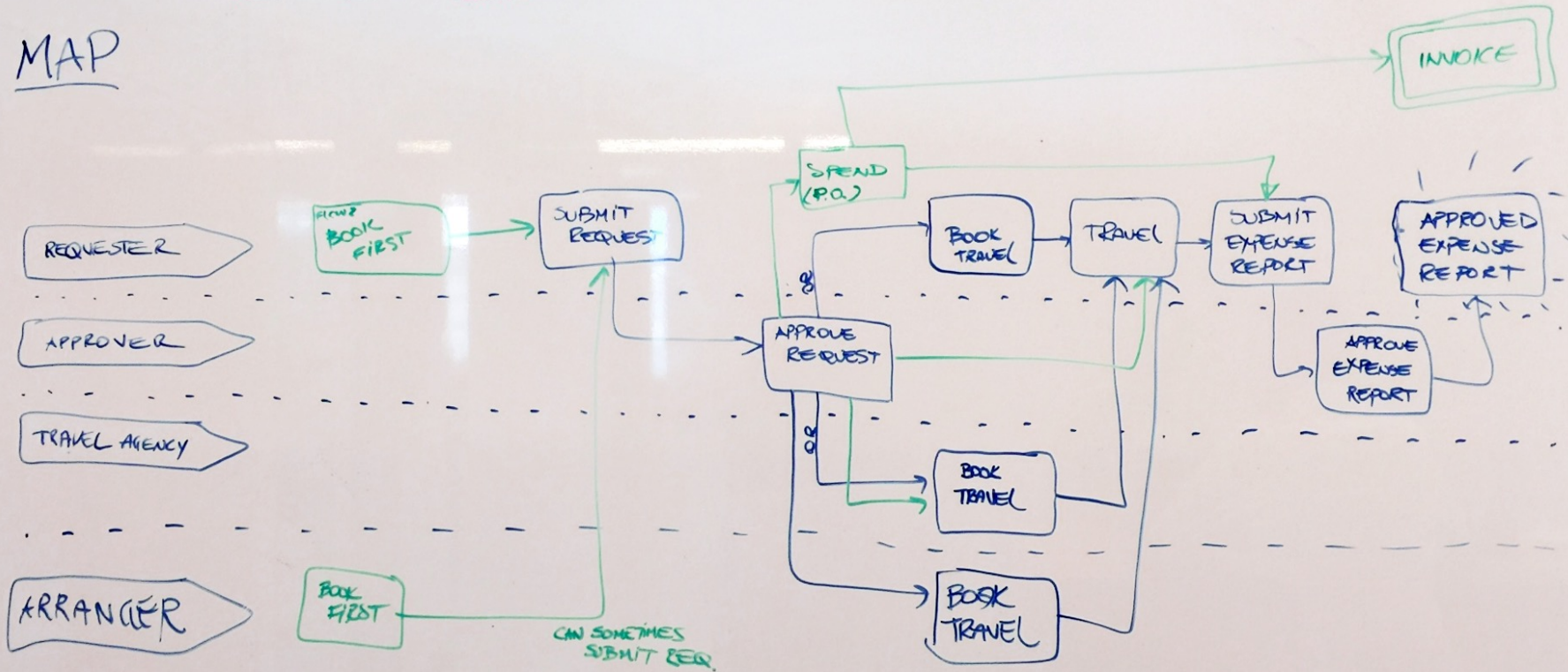
Approver

Arranger

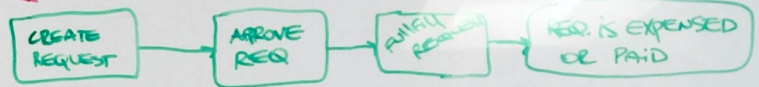
Travel Agent

PLEASE DON'T ERASE

MAP



HOME
FLY REQUESTS



BOOK CREATED & REVENUE	CARRIER & BOOK (MILEAGE)	CARRIER & MILEAGE PNR (STAY TIME)
60%	3%	34%

25% OBT

BOOK BEFORE REQUEST IS APPROVED

95% of REQ
5% of REQ

BOOK AFTER REQUEST IS APPROVED

USER PNR
BOOK TRIP

ADD ADDITIONAL EXPENSES
or CALL ADV.

AGENCY BOOKS TRIP (PNR)

PASSIVE (NEW) OR ACTIVE

ON APPROVAL AUTO-BOOK ON TRIP EXPENSES INCURRED

EXPENSE REPORT

MANUAL SEGMENTS

ADD EXP. EXPENSES + ADD CA.

ACTIVE (PASSIVE IS FEATURE)

USER BOOKS ON OBT OR TRIP LINK ON TRIP EXPENSES

EXPENSE REPORT

AGENCY BOOKS

NON TRAVEL INTEGRATION TRAV. REQUEST

75%

MANUAL SEGMENTS

ADD EXP. EXPENSES ADD. CA.

ACTIVE (PASSIVE CONTROL)

USER OR AGENCY BOOKS OUTSIDE

EXPENSE REPORT

REQUEST FOR EXPENSE

ADD EXP

ADD CA. ?

ACTIVE (PASSIVE CONTROL)

IN CURR EXPENSES

EXPENSE REPORT

AUTH

ASK AUTH (HEADER) + CUSTOM SEGMENT (EX: MEETING ROOM) OR A NEW

ACTIVE (PASSIVE CONTROL)

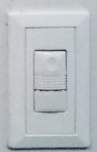
PURCHASE REQ

CREATE PURCHASE REQUEST

ACTIVE (CHECK CONTROL?)

PO (CREATED) (AUTO OR NOT?)

INVOICE RECEIVED & PAID



PAIN POINTS & SUCCESS METRICS

Poor product integration

Confusing labeling

Unintuitive IA

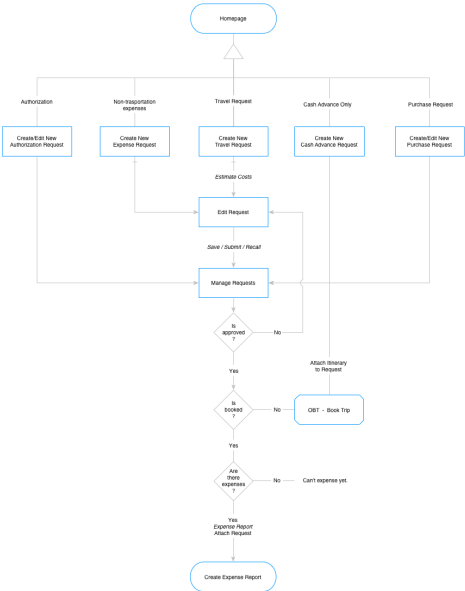
Poor core task completion

Lack of system feedback

SYSTEM & FLOWS

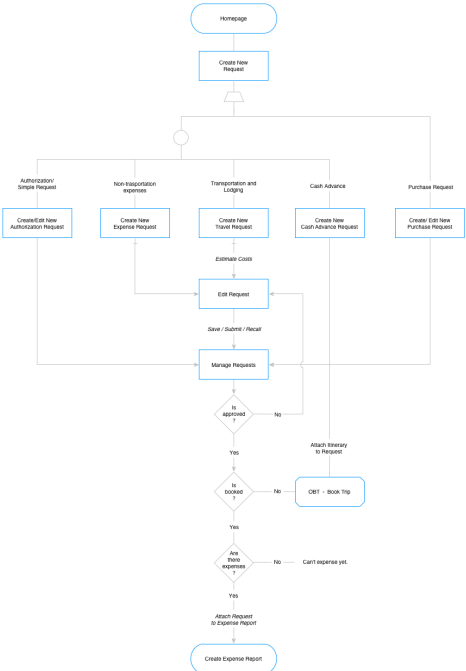
BOOK AFTER APPROVAL - FLOW OPTION 1

Choose request type, then customize



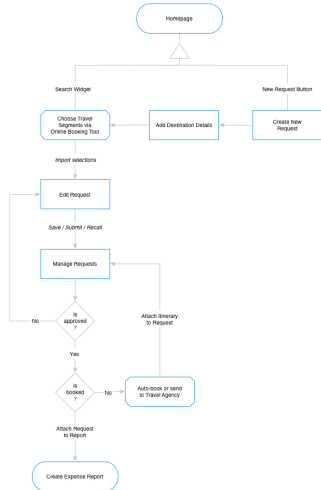
BOOK AFTER APPROVAL - FLOW OPTION 2

Jump into creation, then choose type

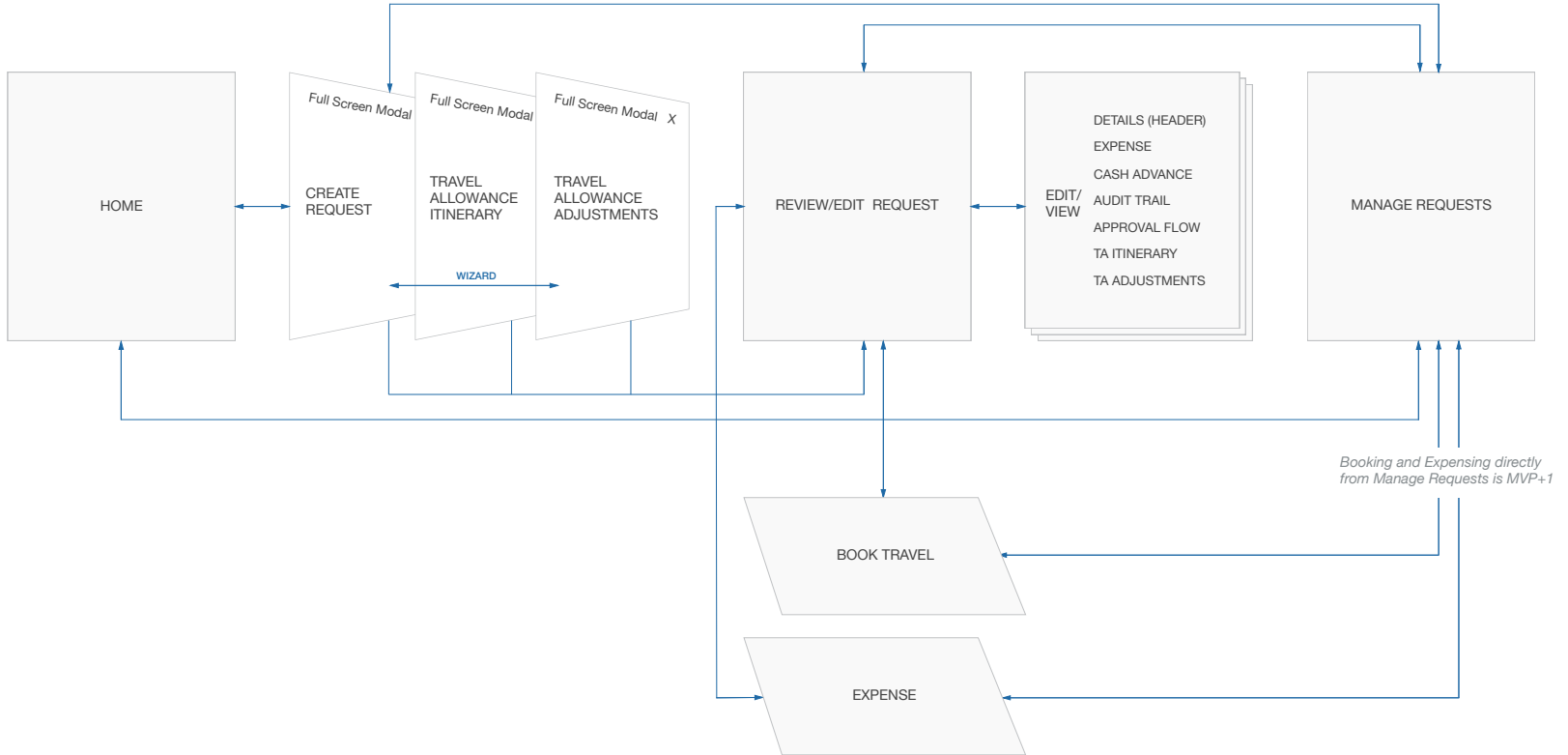


BOOK BEFORE APPROVAL

Complete Request after booking



IA



Create

Request Name

Policy*

Business Purpose

UI DESIGN

Travel Request Non-Travel Expenses Purchase Request

WHERE ARE YOU GOING?

Departure* Depart*
 Seattle, WA (SEA) 05/01/2017 Morning

Destination* Return*
 City, Address, or Airport dd/mm/yyyy Evening

+ More than one destination? Add another.

WHAT DO YOU NEED FOR THIS TRIP?

- This is a simple authorization. What's that?
- Transportation and Lodging
 - Hotel
 - Flight
 - Train
 - Car Rental
 - Taxi
 - Parking
 - Limo
 - Other Expenses
 - Meal Allowances (3 Days Included)
 - Cash Advance

Continue

Business Purpose*

Travel Request Non-Travel Expenses Purchase Request

PLAN YOUR TRIP

Roundtrip One Way Multi-City

From
 City or Airport* Depart*
 Seattle, WA 05/01/2017

To
 City or Airport* Return*
 05/01/2017

- Transportation
- Expenses
- Cash Advance

Create Request

Create a Request

Request Name*

Policy*

Business Purpose*

Travel Request Non-Travel Expenses Purchase Request

BUILD YOUR TRAVEL REQUEST

Roundtrip One Way Multi-City

From
 City or Airport* Depart*
 Seattle, WA 05/01/2017

To
 City or Airport* Return*
 New York, NY 05/04/2017

End of Travel

Create Request

New Travel Request

Request Name*

Policy*

Business Purpose*

WHERE ARE YOU TRAVELING TO?

Depart From* Depart*
 Seattle, WA (SEA) 05/01/2017

Destination* Return*
 City, Address, or Airport dd/mm/yyyy

+ More than one destination? Add another.

INCLUDE BASICS

- Individual Meals
 - Every meal
 - I have exclusions
- Hotel
- Flight
- Rental Car
- Ground Transportation
- Mileage
- Cash Advance

Continue

Search

- Request to Book - with Meal Adjuster
 - RB - Homepage
 - RB - Travel Allowance Adjustmer
 - RB - Travel Allowance Adjustmer
 - RB - Edit Request - Edit Request
 - RB - Manage Requests
- Request to Book - with Meal Adjuster
 - RB - Homepage
 - RB - Travel Allowance Adjustmer
 - RB - Travel Allowance Adjustmer
 - RB - Edit Request - Edit Request
 - RB - Manage Requests

New Travel Request



Travel Policy *
United States

Business Purpose *

PROTOTYPING & TESTING

WHERE ARE YOU TRAVELING

Depart From *
Seattle, WA (SEA)

Destination *
City, Address, or Airport

[More than one destination? Add another](#)

ADD TO REQUEST

- Travel Allowances
 - Include all meals
 - Make adjustments (e.g. some)
- Flight
- Hotel
- Car Rental
- Mileage

PAGES
RB - Edit Request - Ed...
Search

- Request to Book - with Meal Adjuster
 - RB - Homepage
 - RB - Travel Allowance Adjustmer
 - RB - Travel Allowance Adjustmer
 - RB - Edit Request - Edit Request
 - RB - Manage Requests
- Request to Book - with Meal Adjuster
 - RB - Homepage
 - RB - Travel Allowance Adjustmer
 - RB - Travel Allowance Adjustmer
 - RB - Edit Request - Edit Request
 - RB - Manage Requests

Manage Requests

Trip to - \$1582.20

Delete Request Send for Approval

Request Details Attachments Add Cash Advance Print/Share

EXPECTED EXPENSES

Add Edit Copy Allocate Delete

Expense type	Dates	Description	Estimated amount
<input type="checkbox"/> Travel Allowances	May 18 - 20, 2017	3 days, Estimated \$75/day	\$225.00 <i>Estimated</i>
<input type="checkbox"/> Flight	May 18 - 20, 2017	Seattle, WA to - Roundtrip	\$425.00 <i>Estimated</i>
<input type="checkbox"/> Hotel	May 17 - 19, 2017	2 nights,	\$682.20 <i>Estimated</i>
<input type="checkbox"/> Car Rental	May 17 - 19, 2017	3 days (Airport Pickup/Return)	\$250.00 <i>Estimated</i>
			\$1582.20 <i>Estimated Total</i>

TEST RESULTS

How are we doing?



GETTING IT BUILT

FR Request - New UI

Backlog

QUICK FILTERS: [Only My Issues](#) [Recently Updated](#)

EPICS [Create epic](#) x

All issues

- Leon - 01 - Request prototype NUI management screen
- Leon - 02 - Create dev environment for Request NUI
- Leon - 03 - Request Tiles
- Leon - 04 - UI automated test for Request Tiles
- Leon - 05 - Request Header (Creation)
- Leon - 06 - CI Process
- Leon - 07 - Create the Request List (Library)
- Leon - 08 - Request Header (Edition)
- Leon - 09 - Expected Expense Screen : Expense list
- Leon -

Sprint 15 : 17/07 - 28/07 12 issues

16/Jul/17 8:12 PM • 28/Jul/17 2:12 PM

- TVR-6433 Create UI Segments for Hotel Segment
- TVR-6588 Add Expense creation button + Action
- TVR-6714 New F&F [integration] - for Header
- TVR-6324 Copy Down - Add a confirmation message popup when there are copy down rules
- TVR-6416 Expected expense screen: Action buttons
- TVR-6810 New F&F [SPIKE] - Composite integration test
- TVR-6808 [SPIKE] Check the behavior of Delegate
- TVR-6430 Create Kibana dashboard for E2E UI test results
- TVR-6842 Message box can't be closed
- TVR-6586 Edit expenses: Clickable rows
- TVR-6229 Link to NUI from the Concur Home page
- TVR-6834 Integrate Allocation - Part 1

Backlog 119 issues

- TVR-6835 Integrate Allocation - Part 2
- TVR-6568 Request menu: Add Triangle + remove Quick search
- TVR-6830 Add id to Currency field in Segments Page

CONCUR Request Travel Expense Invoice App Center

New Expense: Flight

Estimated Amount* \$425.00 Currency USD

Roundtrip One-Way Multi-City

From* Seattle, WA (SEA) Depart* 05/19/2017 9:00am

To*

Add Comment

From* Seattle, WA (SEA) Depart* 05/19/2017 9:00am

To*

Add Comment

From* Seattle, WA (SEA) Depart* 05/19/2017 9:00am

To*

Add Comment

+ Add Another Flight

Custom Field One* Custom Field Two*

Standard Box: Background - F9F9F9, border - C0C2C4 On "Delete Flight" hover, change border to C6442E

WORK IN PROGRESS

PROJECT: APPROVALS - INFORMATION ARCHITECTURE (IA) AND ITEM LIST REDESIGN

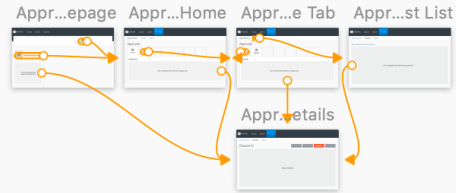
GOAL

Streamline the approval process for approvers by:

- reducing redundancy in the IA to simplify user's navigation experience
- provide an optimized view into the work the approver needs to do
- elevate relevant details to help approvers make good decisions
- reduce the time it takes an approver to do their job

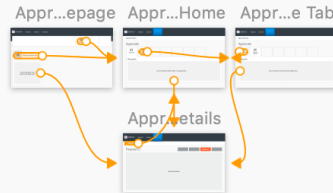
IA OPTIONS - CURRENT

As is live today. Contains redundancy by showing the same list of to-be-approved items on two different pages. Also, always lands on the Expense tab, forcing users to have to click again if approval is needed elsewhere.



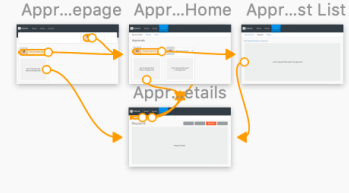
IA OPTIONS - ALTERNATIVE 1

Pro: Removes redundancy by cutting product-specific list pages. All lists live within corresponding tabs on the Approvals Home page. Con: Still always lands on the Expense tab, forcing users to have to click again if approval is needed elsewhere.

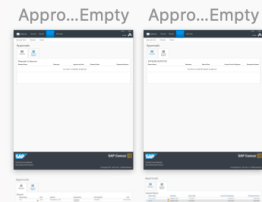


IA OPTIONS - ALTERNATIVE 2 - Preferred By UX

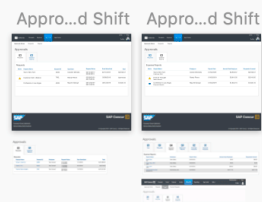
Pro: Removes redundancy and the default tab issue. Provides approvers with a summary view into new and high priority items in need of attention. Con: Will require us to build the new Approvals Home page.



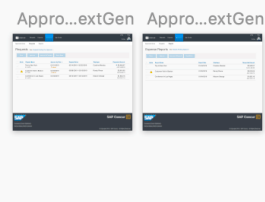
APPROVAL HOME - EMPTY STATES



APPROVAL HOME - LIFT & SHIFT



REQUEST LIST PAGE - NEXT GEN



THANK YOU

Please reach out for a more detailed walk-through of this work or if you have any questions.

alex@door51.com | 650.440.1281