

# App Center

## User Experience Guidelines

Welcome to the Concur App Center!

### Introduction

We are very excited to partner with your company. In this guide, we will help you streamline the process of connecting a user's Concur account to your system. You will find best practices for user-centered design, examples of dos-and-don'ts, and suggested steps that users should follow.

It is not our intention to tell you what colors and fonts to use. Maintaining your brand integrity is important, and these guidelines do not interfere with that. Rather, our goal is for Concur users to have a pleasant and consistent experience across all of our partner applications. Observing these guidelines will help ensure that our shared users have positive experiences with both of our companies as a result of our partnership.

### A word on accessibility

This guide also includes some suggestions on how to ensure your site is [Section 508 compliant](#). At Concur, we work hard to make sure our critical services are available and usable by every employee at the companies who use our products. From private companies to government agencies, we have a wide range of users with varying levels of abilities. Observing accessibility best practices in your product helps us meet our commitment to provide quality software to our entire user base.

### Scope

Your App Center user experience may differ based on the type of application. The following are included in the scope of this guide:

- **Audience**
  - **Enterprise** Integrations – access data company-wide
  - **Consumer** Integrations – access data for an individual
- **Channel**
  - **Applications** (Apps) including SaaS, desktop or mobile that serve as an administrator's or user's portal in which they interact with the service or purchase goods.
  - **Services Only** – a connection in which users interact with the service in-person or without the use of an application.

Throughout this document, please refer to the labels for the guidelines relevant to the audience(s) and channel(s) you will support. “General” guidelines apply to all Concur integrations.

General

Enterprise

App

Consumer

Services

## Design recommendations

This guide includes requirements and recommendations for your App Center partnership with Concur. These guidelines will allow you to integrate Concur's user-centered design approach into the end user's and administrator experience, creating a seamless integration. Required elements are essential, and recommended elements are optional but useful for creating a comprehensive integration with Concur.

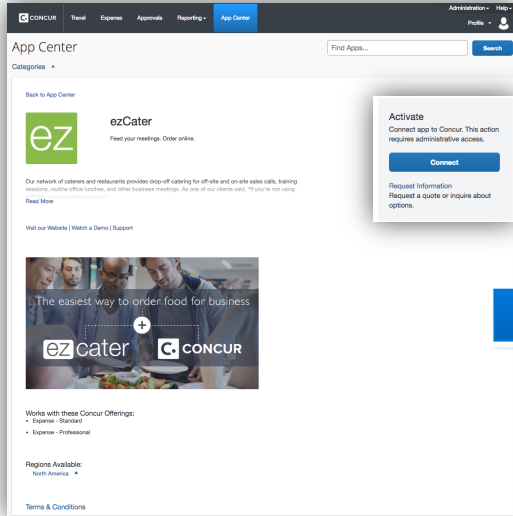
### Account Linking Process

This section provides guidelines for the process for a user to connect to your application. A “user” (described generically within this document) can be either an administrator (Enterprise) or end-user (Consumer), depending on your integration. Note that not all steps below will apply to all applications. This guide, however, attempts to cover the common variations. Please refer to the relevant sections for your application type as described above in the “Scope” section.

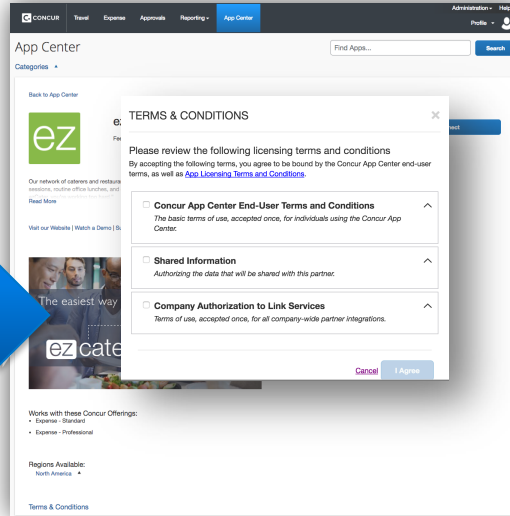
The connection flow begins from the App Center. Once the user has accepted the terms of the connection, the user will be redirected to your site.

<Continued on next page>

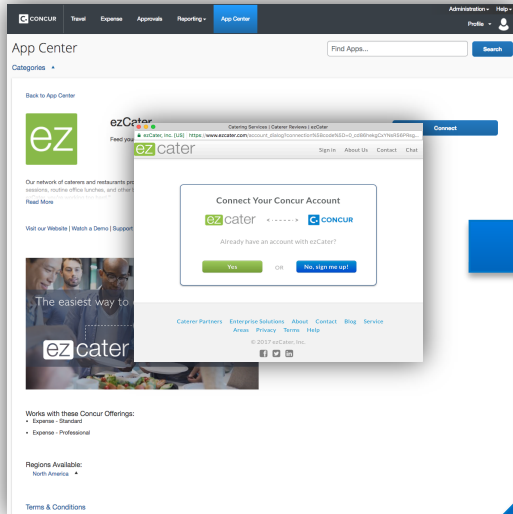
## Step 1 Connect



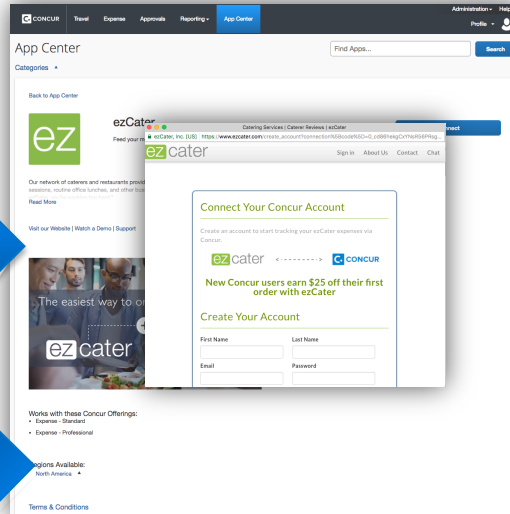
## Step 2 Accept Terms



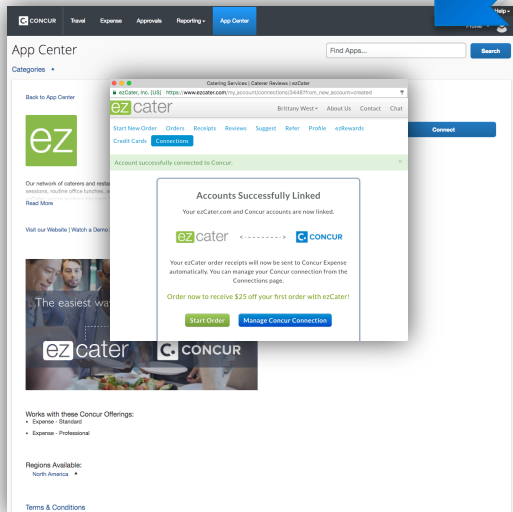
## Step 3 Sign in or Sign up



## Step 4 Account Creation



## Step 5 Confirmation

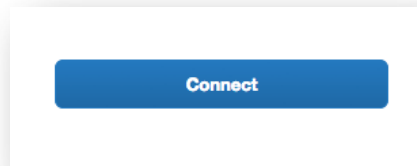


## Connect

### Consumer

There are two possible configurations for consumer listings:

1. **“Connect”**. This applies to App Center partners and TripLink suppliers without loyalty accounts. This configuration and flow is depicted above.

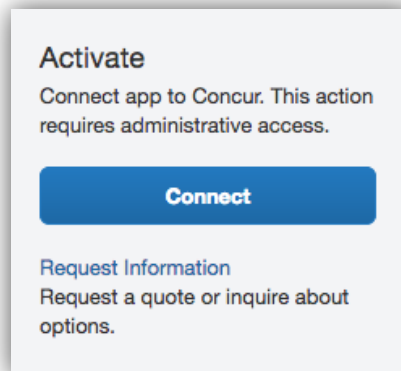


2. **“Connection Request”** which applies to TripLink suppliers with loyalty accounts. For more information on this flow, please refer to the TripLink supplier guide.

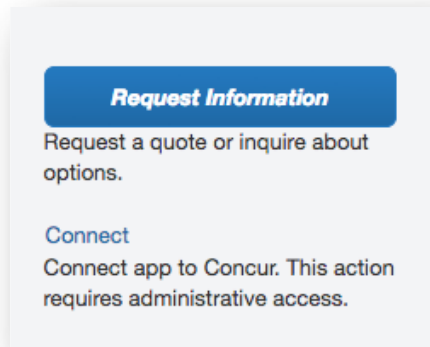
### Enterprise

There are two possible configurations for enterprise listings that modify the primary action for the user.

1. **“Connect” as the primary action**. In this configuration, “Connect” is more prominent. This should be used in cases where the user can self-service and connect their Concur account to your application automatically.



2. **“Request information” as the primary action**. In this configuration, “Request information” is more prominent. This should be used in cases where the customer must contact the partner before connecting. This may be the case for applications which have multiple options, versions and/or varying pricing.



## Accept Terms

### General

The Terms & Conditions for your application will differ between Enterprise and Consumer applications. Enterprise applications require an additional, company-wide authorization.

For more information on the terms & conditions, please refer to the [documentation on the Developer Portal](#).

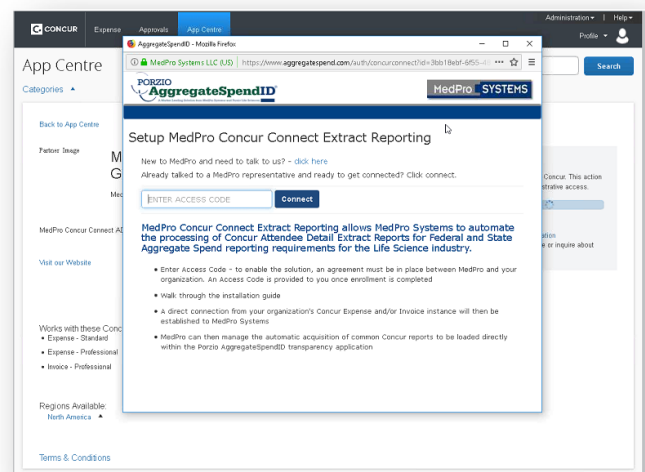
## Verification (optional)

### Enterprise

If your application activation requires pre-requisites (e.g. a contract or other manual set up is required), you may introduce an additional step in which a user must provide a verification code to proceed. The partner will provide the verification code once the pre-requisites have been completed. This page should clearly articulate the next steps and should provide the user the option to:

- Enter the verification code
- OR
- Contact Us

The “Contact Us” option will allow users that have started the process but not yet completed pre-requisites to receive assistance and information on next steps. Users should be provided a way to contact you that is continuously monitored. You may use the inquiry link



used in your listing (for more information on the inquiry link please refer to the [App Center Listing Form submission document](#)).

## Sign In or Sign Up

Consumer

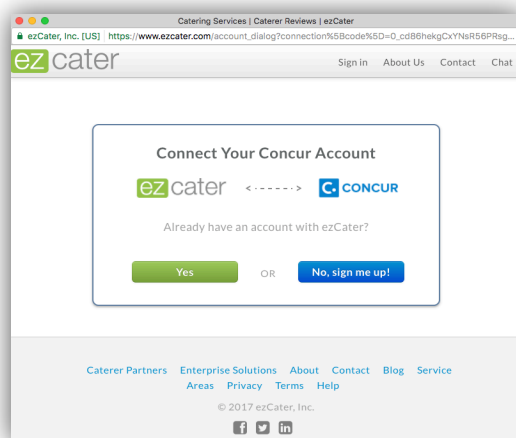
Enterprise

App

This is the first page the user sees when redirected to your site. This should include an option to Sign in with an existing account or sign up for a new account.

This page should:

- Clearly indicate the integration with Concur
- Include links to your terms and conditions and privacy policy



Enterprise

App

For Enterprise Applications, it is likely that the user does not have an existing account. In those cases, skip this step.

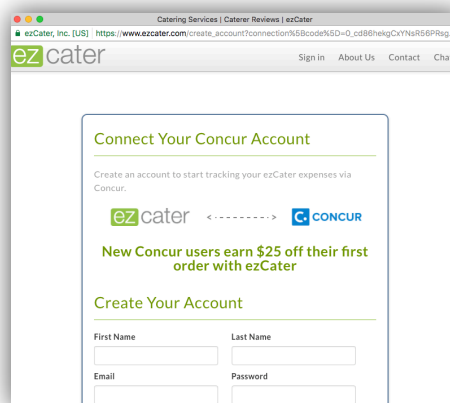
## Account Creation

Enterprise

App

For most Enterprise Applications, administrators will set up a new account specifically for the Concur and company integration.

For applications that support both Enterprise and Consumers, an administrator may have an existing, personal account; In that case, it is recommended that this page guide the user to create a new, separate business account for the purpose of administering their company's integration.



General

To facilitate ease of use and encourage users to complete registration, it is recommended that this page only include necessary information to create the account.

Account details can be pre-populated in this form leveraging Concur API's. For more information, please refer to [documentation](#) on the Developer Portal.

Once the user submits the form, your application will begin the authentication process. Your Partner Enablement representative will provide the technical details for implementation based on your Concur integration type.

## Confirmation

Once the connection is complete, let the user know that the connection was successful.

Enterprise

App

For Enterprise Applications, this is a great place to include links to:

- Application Dashboard
- Administrator Profile and Settings
- Next steps including tools to contact end-users

Consumer

App

For Consumer Applications, this should include a link to frequently used functionality (e.g. book a trip or start order) and a link to the user's profile.

Services

For Services, this should provide the user information on what will occur next such as to expect an email to book their first service or what to expect from their Concur integration.

General

In all cases, links to your support and help should be provided.

For each of the above, it is recommended that links open a new browser window to clearly indicate that the connection flow is complete and to allow for a larger form factor.

## Application Setup (*optional*)

Enterprise

As noted in the “Confirmation” step above, once the connection is complete, some applications may require additional setup. Administrators should be made aware that additional steps are required but may not have the information or time available to complete the setup process. It is recommended that the administrator be prompted with next steps immediately but be allowed to return to your application at a later date.

In particular, Front Office enterprise applications require that users be provisioned for the service. To manage that, and because clients may want to provision only a subset of their users for your service, we recommend providing several methods to add new users. Namely:

- Allow customers to import the user list. At a minimum, your service will need the user's unique identifier to call the appropriate profile services so we recommend requiring that on import.
- Allow customers to invite users to the service individually or as a group. If your service will be triggering the invitation notification, it's recommended that the administrator be given the option to select which users receive the notification.
- Allow the administrator to customize the notification. This may be by providing a template that the administrator can copy/paste to their users or customizable content within your application.

See the "Contacting users" section in the "Application requirements and recommendations" section below for more information on notification content.

## Application requirements and recommendations

This section provides guidance and recommendations specific to your Concur integration and the areas of your application that support it.

SCOPE	AREA	GUIDELINES
General	Account Linking (General)	<ul style="list-style-type: none"> <li>• All pages must support a form factor of 800x600 (required)</li> <li>• Pages must provide back/forward navigation, where applicable. (required)</li> <li>• Include support and help options clearly throughout the process. (optional)</li> <li>• Support major browsers and versions. The full list of Concur-supported browsers is available <a href="#">here</a>.</li> </ul> <p>Please read on for specific requirements and guidelines for the connection experience</p>
Enterprise App	Administrator Accounts	Support multiple administrator accounts for a single enterprise integration (optional)
Front Office Enterprise Applications (e.g. requires a separate, end-user account)  Refer to <a href="#">this section</a> for more information.	Contacting Users	<p>Once a company has connected to your application, emails or other push notifications may be triggered from your application, by the client administrator, to users to invite them to your utilize app or service.</p> <p><b>General</b></p> <p>All emails or other push notifications sent by your integration should clearly identify the Concur integration and include Concur branding. Please refer to the <a href="#">Concur App Center branding guidelines</a>. (required)</p>



SCOPE	AREA	GUIDELINES
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### Emailing End-Users

- Allow the administrator to trigger notifications. Notifications may not be automatically sent to end-users without administrator approval. (required)
- Provide the option for administrators to:
  - select users to notify (required)
  - preview the notification text (required)
  - edit the notification text (optional)
  - view which users have completed the connection (optional)

App

Disconnect

Users must be provided with a method to disconnect within your portal. Please see documentation for [revoking a token](#) on the Developer Portal. (optional)

## Accessibility best-practices

### Provide text alternatives

Providing text alternatives for non-text content ensures that individuals with visual impairment are still able to understand your site or application. Concur recommends providing short text alternatives for images, which makes your image content nearly as accessible as your text-based content. This allows special technology such as screen readers (which assist the blind) to read your content aloud to a user with visual disabilities.

### Distinguishable content

Concur's design focuses on making it easy for users to see and/or hear content. Concur manages this challenge by:

- Clearly separating foreground from background
- Making sure color is not used as the only visual means of conveying information, indicating an action, prompting a response or distinguishing a visual element
- Using readable fonts, making sure any text is at least 14 points and has good contrast (a minimum of 4.5 to 1 color contrast between the text and background color is recommended)

- Providing a highly visible highlighting mechanism for links or controls when they receive keyboard focus

These design elements help make the user experience better for all users, but especially those who are visually impaired or color-blind.

## **Keyboard control**

All functionality of your site or application should be operable through a keyboard interface without requiring specific timings for individual keystrokes. Providing keyboard input mechanisms helps users with visual impairments or mobility issues to use your site without having to point-and-click on objects they cannot see. The keyboard interface can be combined with mouse input or other input methods, to support all users.

## **Predictable structure**

Concur's design attempts to make all pages appear and operate in predictable ways. Concur manages this challenge by:

- Positioning labels clearly and in close proximity to inputs
- Using consistent navigation patterns across a set of webpages

## **Input assistance**

Concur aims to help users avoid and correct mistakes by:

- Hiding optional form fields
- Validating form submissions on the server
- Re-displaying a form with a summary of errors, if necessary
- Providing error notifications as the user enters information, including error notification information in the page title
- Highlighting or visually emphasizing errors where they occur

For further information on accessibility for you and your team, we recommend:

- <http://www.w3.org/WAI/guid-tech>
- <http://www.w3.org/WAI/WCAG20/quickref/>
- <http://webaccessibility.jhu.edu/what-is-accessibility/important.html>

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