

University of California San Francisco

Supply Chain Management

MyExpense: Concur NextGen UI Sneak Peek

June 2022

About the Project

- SCM will be updating the user interface for **MyExpense**
- Go-live tentatively scheduled for September 2022

Why is the user interface being updated?

- Concur is updating the user interface to Next Generation Expense User Interface (NextGen UI)
- NextGen UI has been in development since 2018
- Improve usability, reduce time and increase accessibility



What to Expect in the New UI

- Upgraded expense reporting experience; more intuitive, integrated and efficient
- Quicker expense reporting with efficient receipt handling
- Better visibility to expense details and the corresponding receipt all on one page
- Improved visibility for itemizations and ability to itemize room rates by night





Key Changes: NextGen UI

Changing

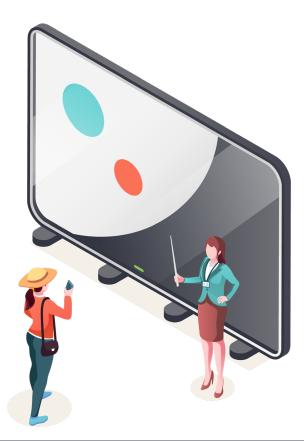
- New look and feel when creating an expense report
- Report header has larger fields for better visibility
- Receipt column has been added to Available Expenses section to help you easily scan the list for items needing a receipt
- Required fields are now marked with a red asterisk instead of a red band at the left edge of the field

Not Changing

- Manage Expenses page will still contain the Report Library, Available Expenses and Available Receipts sections
- Available Receipts look and feel will remain the same
- Expense approver screens will not be impacted
- The SAP Concur mobile app experience will not change



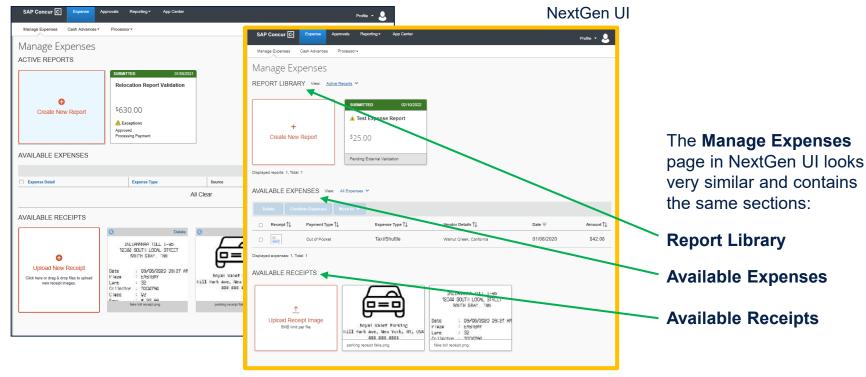
MyExpense NextGen UI Demo





MyExpense: Manage Expenses

Current UI





NextGen UI Manage Expenses

SAP Concur C Expense Approvals	Reporting → App Center						
Manage Expenses Cash Advances Processor	•						
Manage Expenses							
REPORT LIBRARY View: Active Reports		In NextGen UI, your Active					
NO	T SUBMITTED 02/10/2022	SUBMITTED 02/10/2022		 Reports and the Report Library are 			
Sa	mple Expense Report	▲ Test Expense Report	combined so all reports are				
Create New Report \$2	250.00	\$25.00			one page. Ac lay by default		
Displayed reports: 2, Total: 2		Pending External Validation		can easily view other reports.			
	AVAILABL	E EXPENSES View: All Expenses	,				
The Available Expen section has been	Ses	Combine Expenses Move to V					
updated to include a	Recei	pt ↑↓ Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date 😇	Amount ↑↓	
Receipt column to he		Out of Pocket	Taxi/Shuttle	Walnut Creek, California	01/08/2020	\$42.08	
you easily scan for it needing a receipt.	EMS Displayed exper	ses: 1, Total: 1					



Create a New Expense Report

Current UI

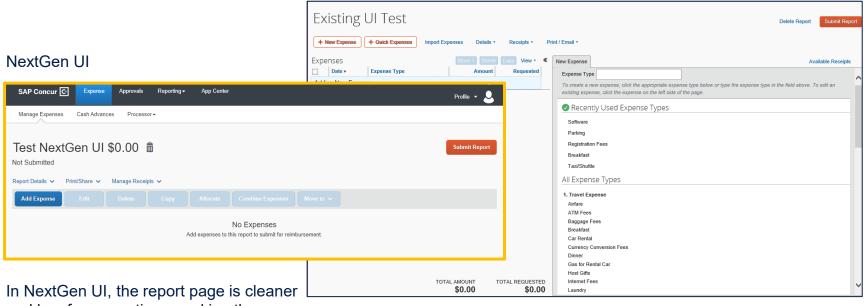
SAP Concur C	Expense Approvals	Reporting -	App Center		Profile 👻 💄			
Manage Expenses	Cash Advances Process	sor▼						
Create a New	/ Expense Rep	ort						
Report Header							Nex	tGen U
Report Name	Policy	End	Triall art Durchase Data Business Durness					
	UCSF Standard Expense Po	lic: 🗸	Create New Report					×
Report Key	Business Unit (SFCMP) Univ of California C	Dep (4	Report Name *		Policy*	~	End of Trip/Last Purchase Date *	* Required field
Fund	Project	Acti	Business Purpose *		Business Unit *	0	Department ID *	
		▼			T V (SFCMP) Univ of California CAMPUS SFCMP)	▼	— j
Flex Field	Expense Type	Was	Speed Type 🕜	0	Fund		Project	0
V		V No	▼		Y - Search by Code		▼ ✓ Search by Code	
			Activity Period	0	Function		Flex Field	0
					▼ Search by Code		▼ ✓ Search by Code	
			Expense Type * None Selected	~	Was a cash advance issued for this trip? * No	~		
			Comment					
In NevtGen I II th	e report header pa	ane is	Unimpik					
		~						
	w Report. The fie	elas						
are larger and ea	sier to navigate.							
Required fields a	re now marked wi	ith a 📩						

red asterisk *.



NextGen UI Add An Expense

Current UI



and has fewer sections, making the page easier to navigate.



NextGen UI Pilot

- 80+ MyExpense customers are piloting NextGen UI
- NextGen UI pilot phase began in early 2019
- We have been gathering pilot customer feedback and reporting any missing functionality and questions to Concur
 - In July 2019 ~30 pilot users were surveyed
 - In April 2022 ~75 pilot users were surveyed



How to Get Help

UCSF employees and suppliers can connect with the **SCM Response Team** using the buttons on the **Need Help?** section of Supply Chain Management's website:

supplychain.ucsf.edu

Need Help?

Connect with the SCM Response Team. Submit a service ticket by choosing the appropriate option.

> UCSF COMMUNITY (FACULTY, STAFF & STUDENTS)

SUPPLIERS / EXTERNAL CUSTOMERS



Please type your questions in the Zoom Q&A. Note: If we cannot answer all questions during this webinar, we will email answers to all participants.



