University of California
San Francisco

Supply Chain Management

MyExpense:
Concur NextGen UI In Depth

September 2022

About the Project

- SCM will be updating the user interface for **MyExpense**
- Go-live: **September 19, 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

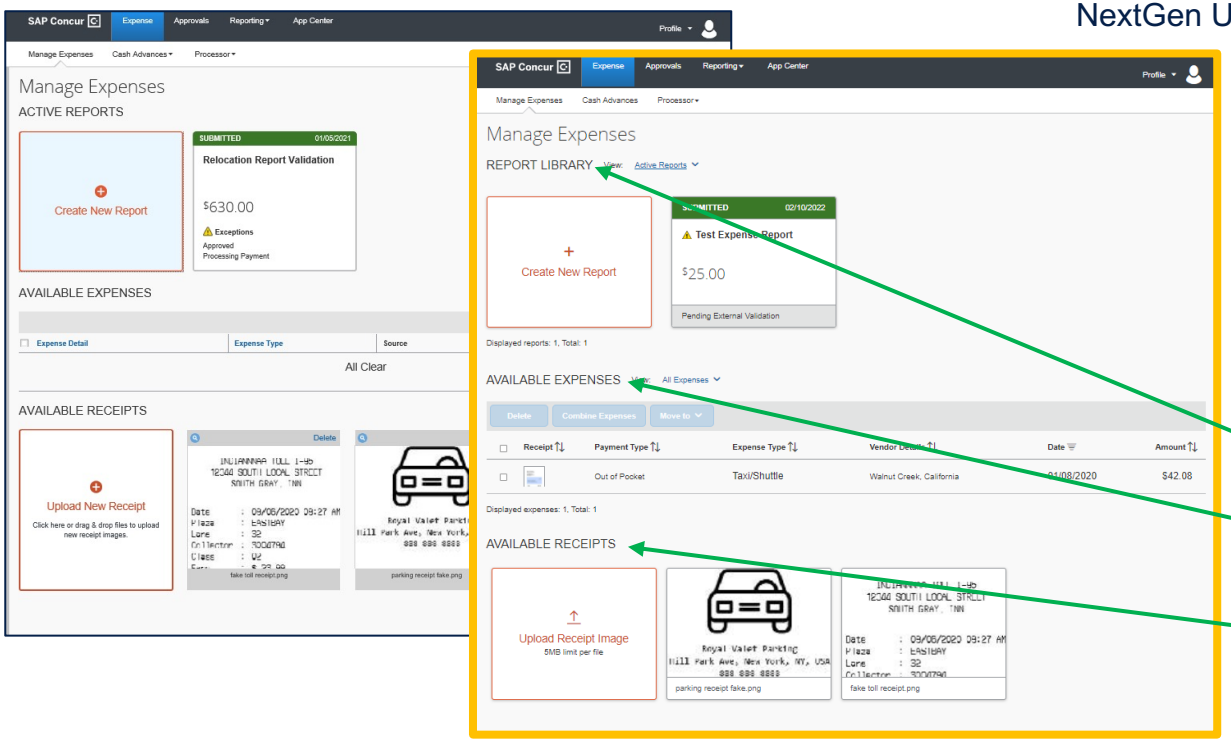
- **Manage Expenses** page will still contain the Report Library, Available Expenses and Available Receipts sections
- **Available Receipts** look and feel will remain the same
- Expense approver screens will not be impacted
- The SAP Concur mobile app experience will not change

MyExpense NextGen UI Demo

MyExpense: Manage Expenses

Current UI

NextGen UI



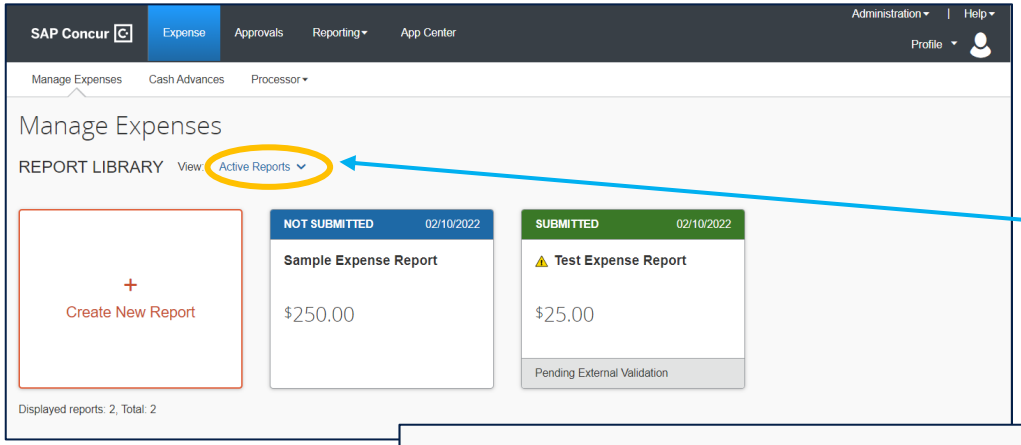
The **Manage Expenses** page in NextGen UI looks very similar and contains the same sections:

Report Library

Available Expenses

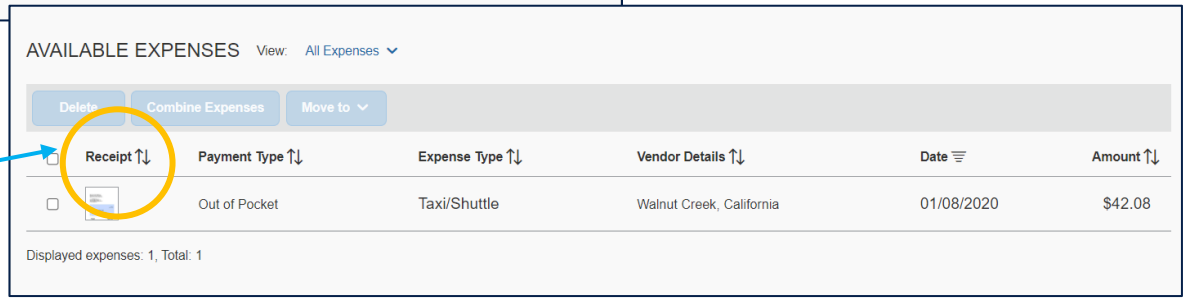
Available Receipts

NextGen UI Manage Expenses



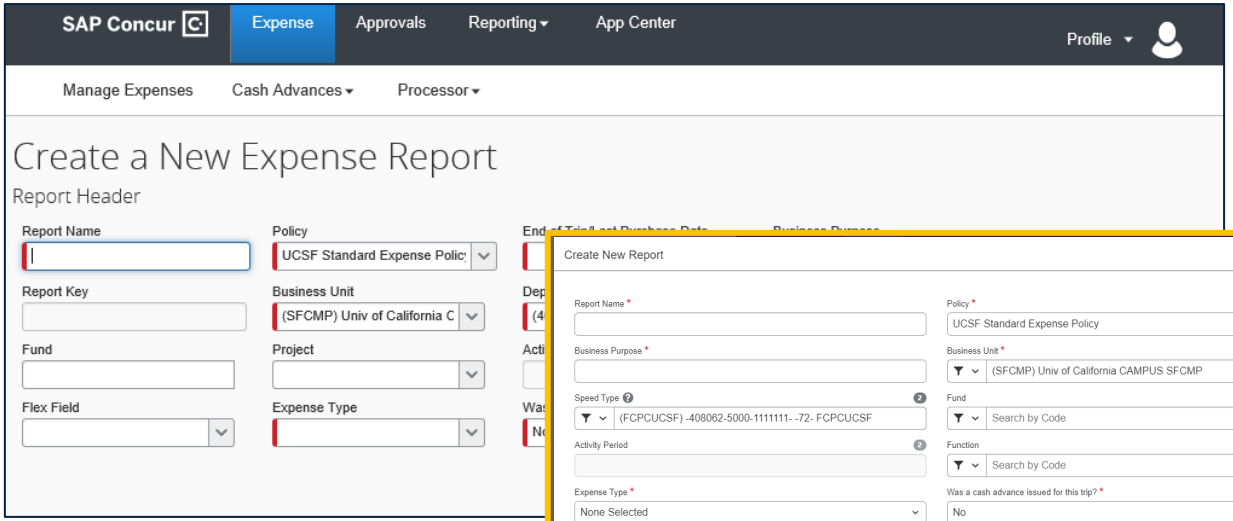
In NextGen UI, your Active Reports and the Report Library are combined so all reports are available on one page. Active Reports display by default, but you can easily view other reports.

The Available Expenses section has been updated to include a Receipt column to help you easily scan for items needing a receipt.

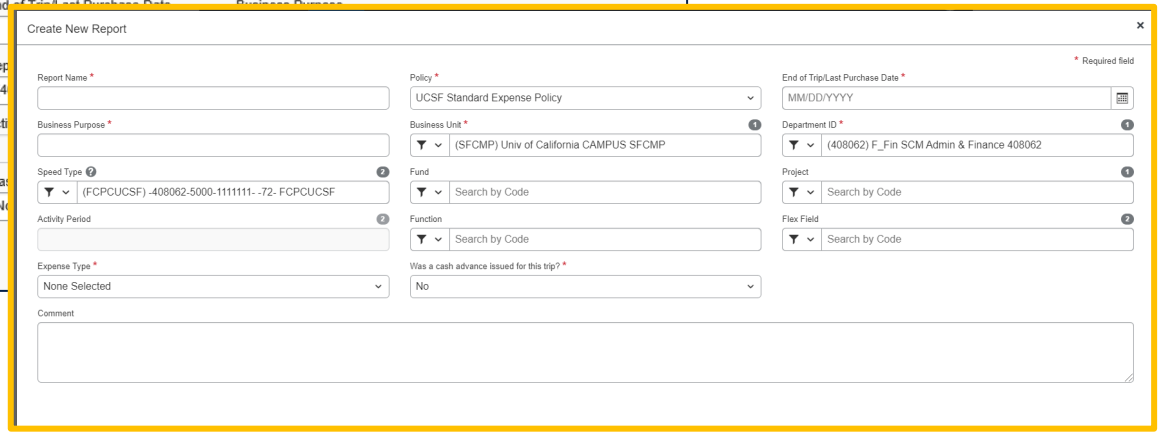


Create a New Expense Report

Current UI



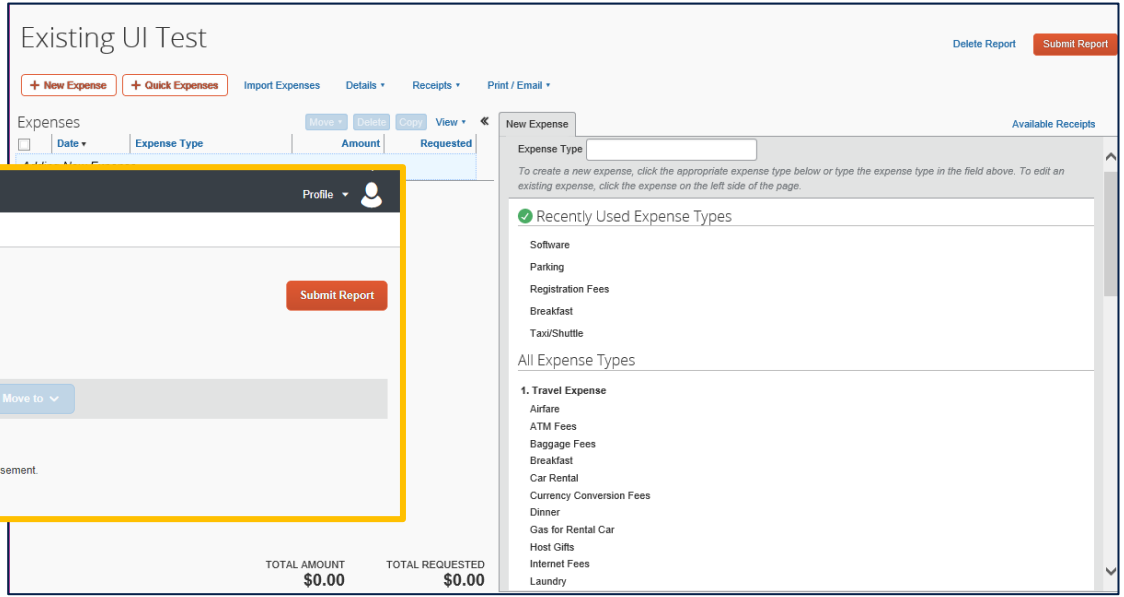
NextGen UI



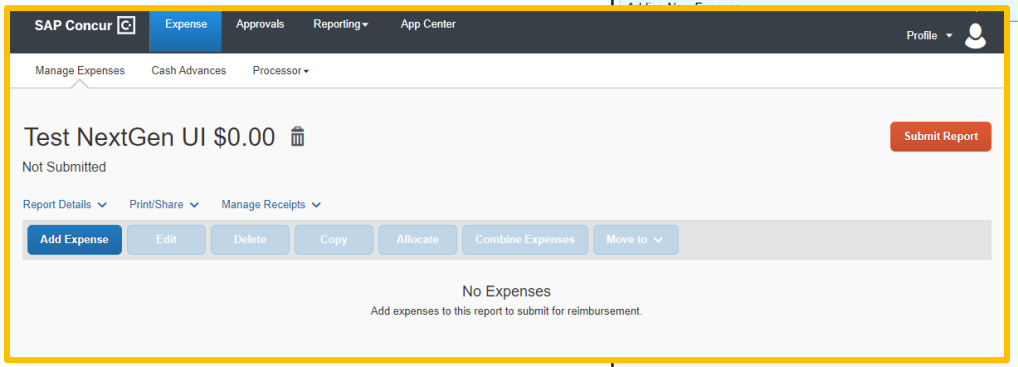
In NextGen UI the report header page is called **Create New Report**. The fields are larger and easier to navigate. Required fields are now marked with a red asterisk *.

NextGen UI Add An Expense

Current UI



NextGen UI



In NextGen UI, the report page is cleaner 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

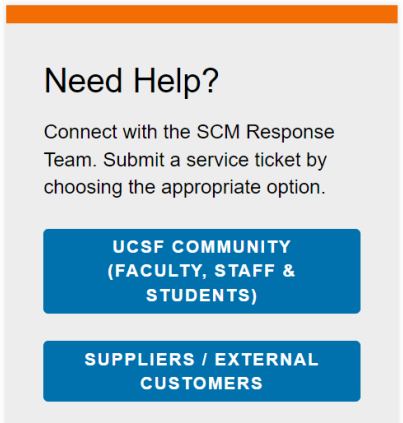
Resources

Supply Chain Management Training Materials

- Webinar recording and presentation
- MyExpense Training – Job aids, online course (coming soon)
- Expense Reimbursement webinar

Support

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



Q&A

Please type your NextGen UI questions in the Zoom Q&A.