



University of California
San Francisco

Supply Chain Management

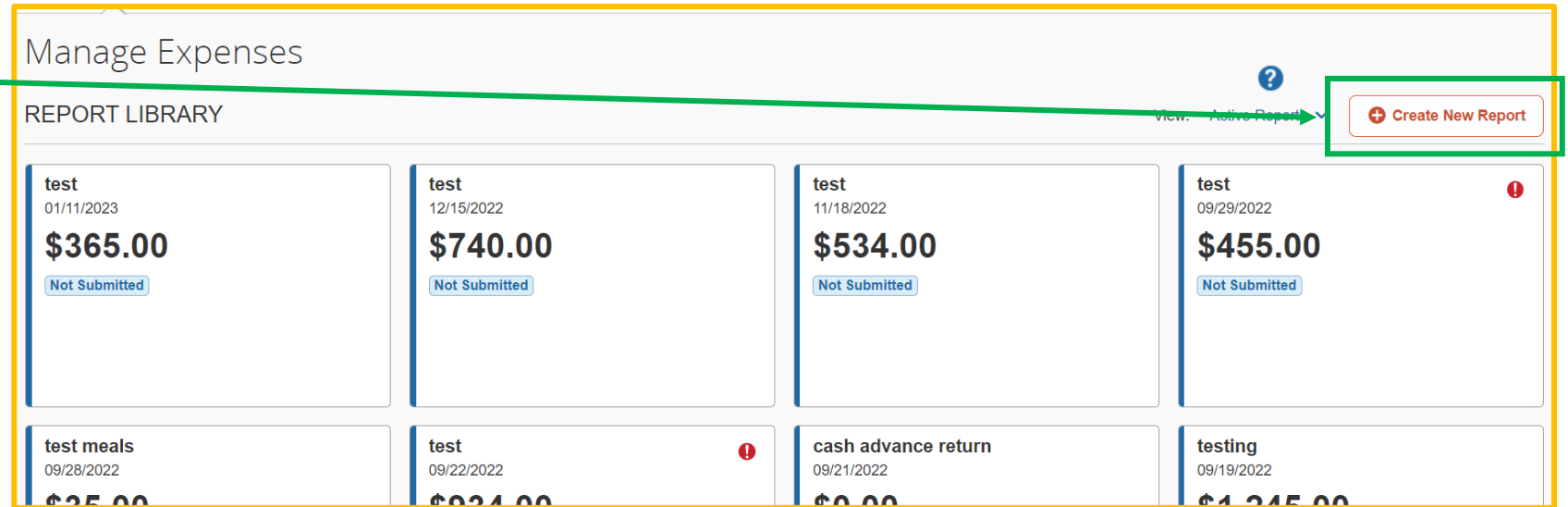
MyExpense: Usability Updates for User Interface

May 2023

Usability Changes to the User Interface

Part of the ongoing continuous improvement for the user experience

The **Create New Report** button is available on the right top corner of the **Report Library** in the **Manage Expenses** section.

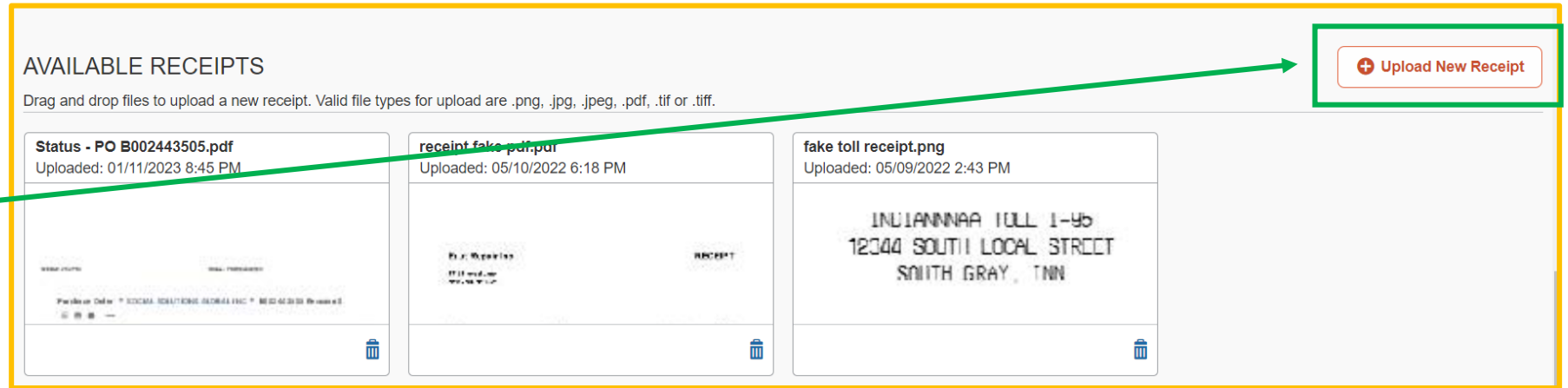


Prior to the UI update, Create New Report took space in the tile list. This change provides more visual screen space to display the existing expense reports.

Usability Changes to the User Interface (2)

Part of the ongoing continuous improvement for the user experience

The **Upload New Receipt** button is available in the right top corner of the **Available Receipts** section. This update provides more screen space to display the existing receipts.



Usability Changes to the User Interface (3)

Part of the ongoing continuous improvement for the user experience

The screenshot displays an expense report for 'testing \$1,245.00' with Report Number: UMV0Z4. The report is 'Not Submitted'. The interface includes buttons for 'Delete Report', 'Copy Report', and 'Submit Report'. A 'View Available Receipts' button is highlighted in green, and a 'Hide Available Receipts' button is also highlighted in green. A blue box highlights the 'AVAILABLE RECEIPTS' panel, which contains instructions for uploading receipts and a list of uploaded files: 'Status - PO B002443505.pdf' (uploaded 01/11/2023 8:45 PM) and 'receipt fake pdf.pdf' (uploaded 05/10/2022 6:18 PM). A green arrow points from the 'View Available Receipts' button to the 'AVAILABLE RECEIPTS' panel, and another green arrow points from the 'Hide Available Receipts' button to the same panel. A blue arrow points from the 'AVAILABLE RECEIPTS' panel to the text below.

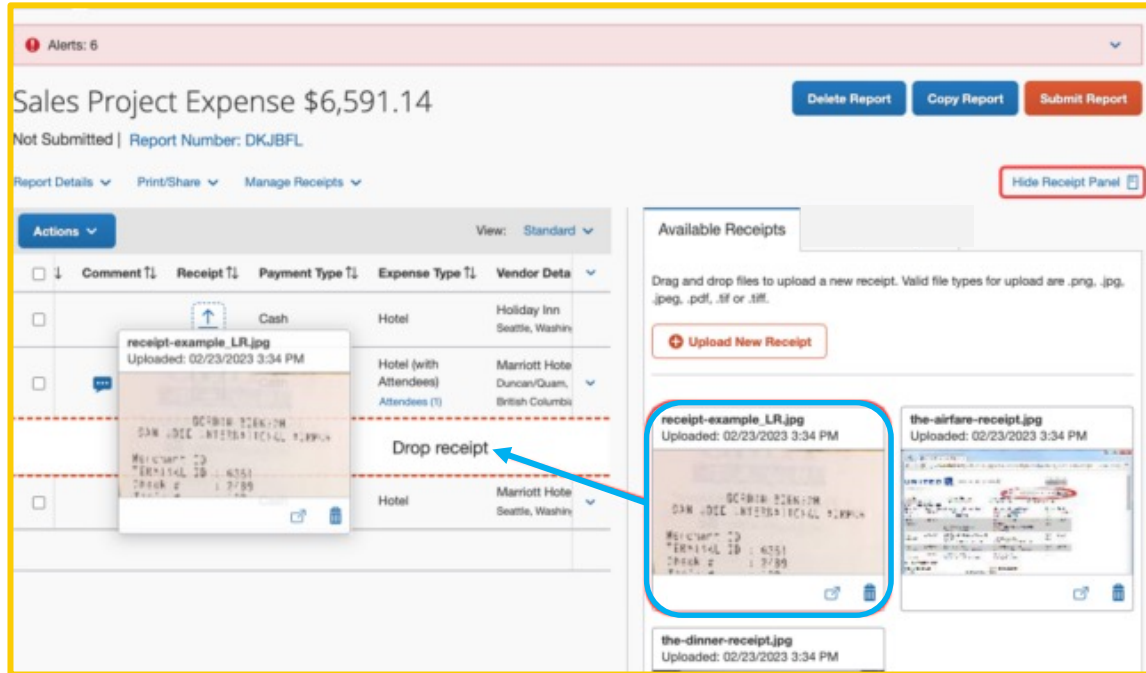
Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket	ATM Fees	San Francisco, California	09/13/2022	\$45.00
<input type="checkbox"/>	Out of Pocket	Seminar/Conference Fees	Jaggaer	09/08/2022	\$1,200.00
					\$1,245.00

Click **View Available Receipts** or **Hide Available Receipts** when viewing an expense report to view or hide the Available Receipts panel.

New ability to toggle visibility of **Available Receipts** panel in the report page.

Usability Changes to the User Interface (4)

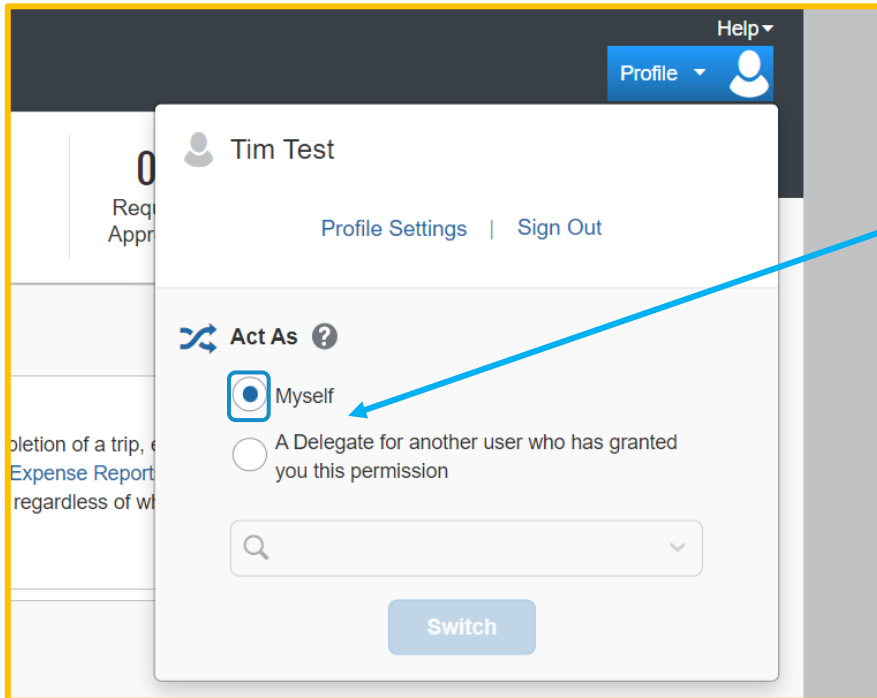
Part of the ongoing continuous improvement for the user experience



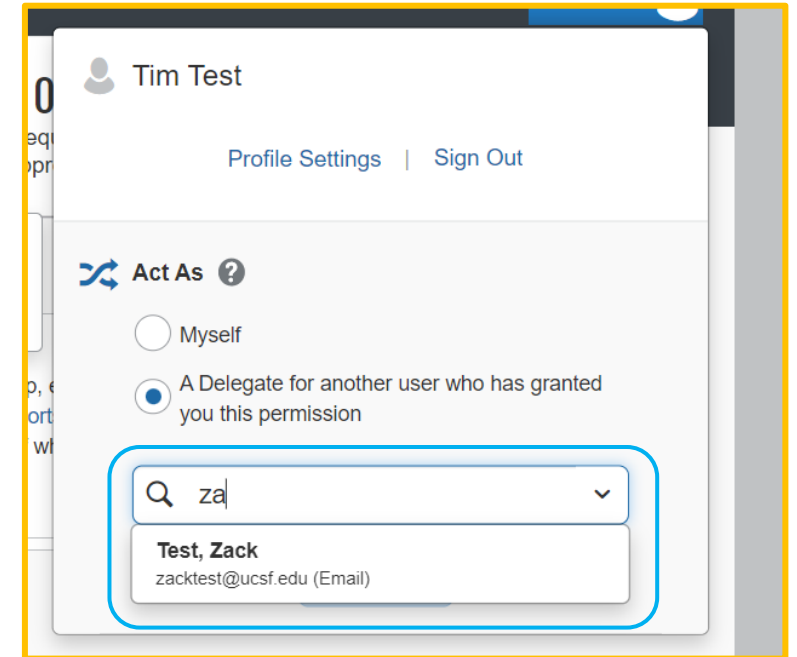
While viewing **Available Receipts** in the expense report page, you can select an available receipt and drag and drop into an expense report line.

Changes to the User Interface

Updates to “Act As” a Delegate user interface.



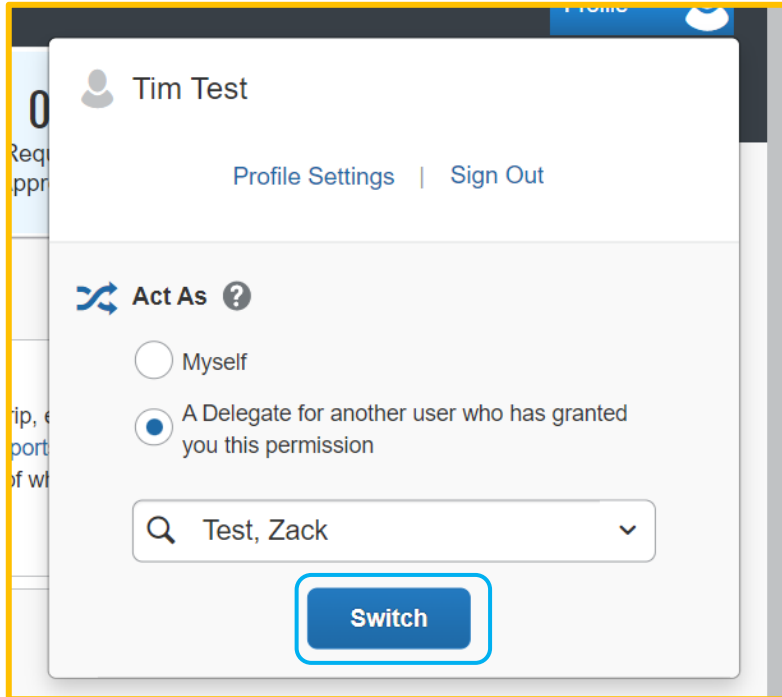
To **Act As** a delegate for another user who has granted you permission, select the second radio button.



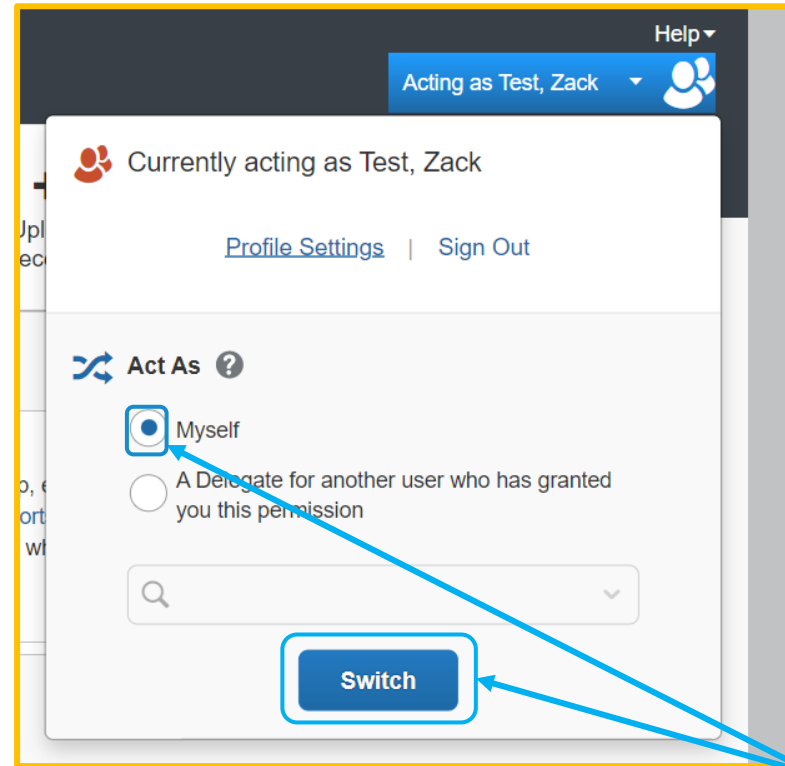
Start typing the name of the person for whom you want to **Act As** a delegate for and select their name.

Changes to the User Interface (2)

Updates to “Act As” a Delegate user interface.



Click **Switch** to act as a delegate for the name selected.



To change back to your profile, select the radio button for **Myself** and click **Switch**.

At the top right you can see who you are currently acting as.

Resources

Supply Chain Management Training Materials

[MyExpense Training](#) – Job aids, webinars, FAQ

Support

UCSF employees can connect with the [SCM Response Team](#) using the button in 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.

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