



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

SAP Concur Expense Approvals Reporting App Center Profile

Manage Expenses Cash Advances Processor

Manage Expenses

ACTIVE REPORTS

+
Create New Report

SUBMITTED 01/05/2021

Relocation Report Validation

\$630.00

Exceptions
Approved
Processing Payment

AVAILABLE EXPENSES

Expense Detail Expense Type Source

All Clear

AVAILABLE RECEIPTS

+
Upload New Receipt

Click here or drag & drop files to upload new receipt images.

ROYAL VALET PARKING
12040 SOUTH LOCAL STREET
SMITH GRAY, TNN

Date: 09/05/2020 09:27 AM
Place: 32
Lane: 32
On Location: 7000790
Class: Q2
Currency: \$ 32.00
take toll receipt.png

NextGen UI

SAP Concur Expense Approvals Reporting App Center Profile

Manage Expenses Cash Advances Processor

Manage Expenses

REPORT LIBRARY View: Active Reports

+
Create New Report

SUBMITTED 02/10/2022

Test Expense Report

\$25.00

Pending External Validation

Displayed reports: 1, Total: 1

AVAILABLE EXPENSES View: All Expenses

Delete Combine Expenses Move to...

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	Out of Pocket	Taxi/ Shuttle	Walnut Creek, California	01/08/2020	\$42.08

Displayed expenses: 1, Total: 1

AVAILABLE RECEIPTS

↑
Upload Receipt Image
5MB limit per file

ROYAL VALET PARKING
12040 SOUTH LOCAL STREET
SMITH GRAY, TNN

Date: 09/05/2020 09:27 AM
Place: 32
Lane: 32
On Location: 7000790
Class: Q2
Currency: \$ 32.00
parking receipt fake.png

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



Manage Expenses

REPORT LIBRARY View: Active Reports

NOT SUBMITTED 02/10/2022
Sample Expense Report
\$250.00

SUBMITTED 02/10/2022
Test Expense Report
\$25.00
Pending External Validation

Displayed reports: 2, Total: 2

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.

AVAILABLE EXPENSES View: All Expenses

Delete Combine Expenses Move to

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	Out of Pocket	Taxi/Shuttle	Walnut Creek, California	01/08/2020	\$42.08

Displayed expenses: 1, Total: 1

Create a New Expense Report

Current UI

The screenshot shows the 'Create a New Expense Report' page in the current SAP Concur UI. The page has a dark header with navigation tabs: 'Expense' (selected), 'Approvals', 'Reporting', and 'App Center'. Below the header, there are sub-tabs: 'Manage Expenses', 'Cash Advances', and 'Processor'. The main content area is titled 'Create a New Expense Report' and 'Report Header'. It contains several input fields and dropdown menus, including 'Report Name', 'Policy' (UCSF Standard Expense Polic), 'Business Unit' ((SFCMP) Univ of California C), 'Fund', 'Project', 'Expense Type', 'Speed Type', 'Activity Period', 'Business Purpose', 'Business Unit', 'Department ID', 'Project', 'Flex Field', 'Was a cash advance issued for this trip?', and 'Comment'. The fields are small and densely packed.

NextGen UI

The screenshot shows the 'Create New Report' page in the NextGen UI. The page is titled 'Create New Report' and has a clean, modern design. It features larger input fields and dropdown menus, including 'Report Name', 'Policy' (UCSF Standard Expense Policy), 'Business Unit' ((SFCMP) Univ of California CAMPUS SFCMP), 'Department ID' ((408062) F_Fin SCM Admin & Finance 408062), 'Project', 'Flex Field', 'Speed Type', 'Activity Period', 'Business Purpose', 'Business Unit', 'Department ID', 'Project', 'Flex Field', 'Was a cash advance issued for this trip?', and 'Comment'. The fields are larger and more spaced out, with red asterisks indicating required fields.

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

SAP Concur Expense Approvals Reporting App Center Profile

Manage Expenses Cash Advances Processor

Test NextGen UI \$0.00 Submit Report

Not Submitted

Report Details Print/Share Manage Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

No Expenses
Add expenses to this report to submit for reimbursement.

Existing UI Test Delete Report Submit Report

+ New Expense + Quick Expenses Import Expenses Details Receipts Print / Email

Expenses Move Delete Copy View

Expense Type Amount Requested

New Expense Available Receipts

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Software
- Parking
- Registration Fees
- Breakfast
- Taxi/Shuttle

All Expense Types

1. Travel Expense

- Airfare
- ATM Fees
- Baggage Fees
- Breakfast
- Car Rental
- Currency Conversion Fees
- Dinner
- Gas for Rental Car
- Host Gifts
- Internet Fees
- Laundry

TOTAL AMOUNT \$0.00 TOTAL REQUESTED \$0.00

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



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**

Q&A



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.

