



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

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.

01/05/2021 09:27 AM  
12345 SOUTH LOCAL STREET  
SOUTH GRAY, TN

Royal Valet Parking  
1111 Park Ave, New York, NY, USA  
888.888.8888  
parking receipt fake.png

01/05/2021 09:27 AM  
12345 SOUTH LOCAL STREET  
SOUTH GRAY, TN

Royal Valet Parking  
1111 Park Ave, New York, NY, USA  
888.888.8888  
fake toll receipt.png

NextGen UI

SAP Concur Expense Approvals Reporting App Center Profile

Manage Expenses Cash Advances Processor

### Manage Expenses

REPORT LIBRARY **Active Reports**

**CREATE NEW REPORT**

**SUBMITTED** 02/10/2022

**Test Expense Report**

\$25.00

Pending External Validation

Displayed reports: 1, Total: 1

AVAILABLE EXPENSES **All Expenses**

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

01/05/2020 09:27 AM  
12345 SOUTH LOCAL STREET  
SOUTH GRAY, TN

Royal Valet Parking  
1111 Park Ave, New York, NY, USA  
888.888.8888  
parking receipt fake.png

01/05/2020 09:27 AM  
12345 SOUTH LOCAL STREET  
SOUTH GRAY, TN

Royal Valet Parking  
1111 Park Ave, New York, NY, USA  
888.888.8888  
fake toll receipt.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



SAP Concur Expense Approvals Reporting App Center Administration Help Profile

Manage Expenses Cash Advances Processor

Manage Expenses

REPORT LIBRARY View Active Reports

+

Create New Report

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

<input type="checkbox"/>	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

SAP Concur Expense Approvals Reporting App Center Profile

Manage Expenses Cash Advances Processor

### Create a New Expense Report

Report Header

Report Name Policy End of Trip/Last Purchase Date Business Purpose

Report Key Business Unit Dep

Fund Project Act

Flex Field Expense Type Wat

Speed Type 2

Business Purpose 2

Expense Type \* None Selected

Business Purpose 2

Department ID \* (408062) F\_Fin SCM Admin & Finance 408062

Project 1

Flex Field 2

Was a cash advance issued for this trip? \* No

Comment

## NextGen UI

Create New Report

Report Name \* Business Purpose \* End of Trip/Last Purchase Date \* Required field

Policy \* UCSF Standard Expense Policy

Business Unit \* (SFCMP) Univ of California CAMPUS SFCMP

Department ID \* (408062) F\_Fin SCM Admin & Finance 408062

Project \* Search by Code

Flex Field \* Search by Code

Speed Type \* (FCPCUCSF) -408062-5000-1111111- -72- FCPCUCSF

Business Purpose \* Search by Code

Function \* Search by Code

Was a cash advance issued for this trip? \* No

Comment

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](https://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 NextGen UI questions in the Zoom Q&A.

