

Thanks for being here today!

- We will start at 1:30pm.
- Today's session will be recorded.
- Questions can be put in chat. We will address as appropriate during the webinar, or after, during the Q&A session.
- Questions not related to the UI changes can be sent to expensehelp@ucdavis.edu.



UCDAVIS

Supply Chain
Management

AggieTravel Changes

August 11, 2022

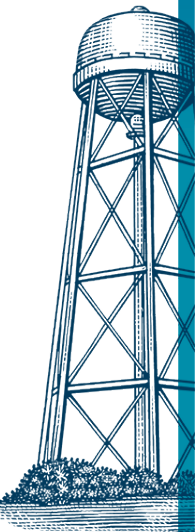


Welcome

Mike Kuhner

Assistant Vice Chancellor and Chief Procurement Officer

Supply Chain Management



Agenda

- Name Change
- NextGen UI - What's changing
- NextGen UI - What's not changing
- Request Changes
- Expense Report Changes
- Demonstration
- Fax Interface Retiring
- Resources
- Q&A



Name Change - AggieExpense!

The purpose of the name change is to help campus identify more accurately what is done on the Concur platform. AggieTravel will no longer be used - it will be called AggieExpense, taking effect September 12th. This will encompass the following:

- Procurement card reconciliation
 - Travel card reconciliation
 - Reimbursement requests
 - Cash Advance requests
 - CTS/PBP reconciliation



NextGen UI – why the update?

- Changes are based on Concur user suggestions and questions.
- To help users easily understand what they need to do and how to do it in order to get their expense reports and requests submitted and approved.
- It is focused on three key areas:
 - **Usability:** designed to be more intuitive, resulting in fewer errors and higher satisfaction.
 - **Efficiency:** optimized task flows to save users time, such as adding attendees, and itemizing hotel expenses.
 - **Accessibility:** developed taking an inclusive approach to design and engineering.



What's Changing

- Cleaner, more streamlined screens
- Larger fonts with easier to read text
- Larger fields making it easier to search for and enter data
- Larger, easier to use buttons
- Required fields indicated with an asterisk (*) for easier identification
- Report Key will be hidden to the user creating and submitting the Expense Report



What's not Changing

- Approval screens
- Report Key will be available to all approvers and on DS reports
- Overall functionality
- How Requests or Expense Reports are processed
- Home Screen



Expense Report

- Create from an approved Request

Create New Report

Create From an Approved Request

User ID

10240703

Policy *

*T&E/Prof Expenses

- Details from the Request will auto-populate the Expense Report Header



Receipt Image

Receipt image is viewable while entering expense details

New Expense Cancel Save Expense

Details Itemizations

Attendees (1) | Allocate

* Required field

Expense Type *
Entertainment Meal, 10 or Less Guests

Transaction Date *
MM/DD/YYYY

Meal Type *
None Selected

Business Purpose

Enter Vendor Name

City of Purchase *

Payment Type
Out of Pocket

Amount *

Currency *
US, Dollar


Comment

Save Expense Save and Add Another Cancel

Upload Receipt Image




Lodging Itemization

Lodging \$580.00 


06/15/2022 | Marriott Hotels


Details | **Itemizations**

Amount	Itemized	Remaining
\$580.00	\$0.00	 \$580.00

New Itemization

Expense Type *

Lodging 

Entry Type: **Recurring Itemization**  06/13/2022 - 06/15/2022 (Nights: 2)

Your hotel room rate was:

The Same Every Night | Not the Same

Room Rate (per night) *	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

(Amounts in USD)

Save Itemization Cancel

Your hotel room rate was:

The Same Every Night | Not the Same

Date	Room Rate	Room Tax	Tax 2	Tax 3
06/13/2022	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
06/14/2022	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

(Amounts in USD)

Save Itemization Cancel

- Lodging itemization
 - Ability to split as a different rate per night

Error Handling

Alerts will appear
at the top of the
report

Alerts: 2

Business Meeting \$550.00

Not Submitted

Report Details

Print/Share

Manage Receipts

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>			Out of Pocket	Lodging	Marriott Hotels Davis, California	06/15/2022	\$580.00	\$550.00 Itemized
							\$550.00	\$550.00

Copy Report

Submit Report

Alerts: 2

EXPENSE | Lodging | 06/15/2022 | \$580.00

The itemization amounts do not add up to the expense amount. [View](#)

You must attach a receipt image to this expense. [View](#)

Request Changes

- "Cash Advances" will be under the "Request Details" of the "Expected Expenses" section.

The screenshot displays the UC Davis Supply Chain Management interface. On the left, a sidebar shows the 'Expected Expenses' section with a dropdown menu open, highlighting 'Request Details'. The main content area shows the 'Cash Advance' form under the 'Details' tab. The form includes fields for 'Cash Advance Amount', 'Currency' (set to 'US, Dollar'), and 'Cash Advance Justification'. A 'Cash Advance Comment (Optional)' field is also present. A red asterisk indicates required fields.

Test \$0.00

Not Submitted | Request ID: 4X4E

Request Details ▾ Print/Share ▾ A

EXPENSES

Request

Edit Request Header Edit Del

Request Timeline

Audit Trail

Linked Add-ons

Add Cash Advance

Cash Advance Timeline Manage Attachments

Details Expenses

* Required field


Cash Advance Amount * Currency * Cash Advance Justification

US, Dollar ▾

Cash Advance Comment (Optional)




Request – Cash Advance


Test \$1,000.00 


Not Submitted | Request ID: 4X4E

Copy Request

Submit Request

Request Details 

Print/Share 

Attachments 

CASH ADVANCES: 1

Amount

\$1,000.00






EXPECTED EXPENSES

Add

Edit

Delete

Allocate

<input type="checkbox"/> Expense type 	Details 	Date 	Amount 	Requested 
<input type="checkbox"/> Airfare	Airfare	07/01/2022	\$500.00	\$500.00
<input type="checkbox"/> Meals and Incidentals (incl. tips)	Santa Barbara, California	07/01/2022	\$500.00	\$500.00
				\$1,000.00

Demo

LIVE DEMO



Request Updates Coming Soon!

- Travel card and p-card applications will be submitted on the Request document.
- Updates/changes to cards will also be submitted on the Request
 - Limit increases/decreases
 - Name changes
 - One-time Merchant Category Code (MCC) request
 - Cancel card

Coming October 2022



Fax Interface Retiring

- The fax interface for attaching receipts to Expense Reports will be retired as of October 1, 2022.
- Removal of the fax interface improves the security, performance, and scalability of Concur.
- Receipts and documentation must be attached through the web interface or mobile app.



Resources

- New help desk email
 - expensehelp@ucdavis.edu
- New Name and User Interface Improvements
 - <https://supplychain.ucdavis.edu/travel-entertainment/aggietravel/user-interface-updates-2022>



Q&A

Q&A

expensehelp@ucdavis.edu

