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.
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

  • Details from the Request will auto-populate the Expense Report Header
Receipt Image

Receipt image is viewable while entering expense details
Lodging Itemization

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

Alerts will appear at the top of the report.

- **Business Meeting $550.00**
- **Out of Pocket**
- **Lodging**
- **Marriott Hotels Davis, California**
- **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
"Cash Advances" will be under the “Request Details” of the "Expected Expenses" section.
### Request – Cash Advance

#### Test $1,000.00

**Not Submitted | Request ID: 4X4E**

**CASH ADVANCES:** 1  
**Amount:** $1,000.00

**EXPECTED EXPENSES**

<table>
<thead>
<tr>
<th></th>
<th>Expense type</th>
<th>Details</th>
<th>Date</th>
<th>Amount</th>
<th>Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Airfare</td>
<td>Airfare</td>
<td>07/01/2022</td>
<td>$500.00</td>
<td>$500.00</td>
</tr>
<tr>
<td></td>
<td>Meals and Incidentals (incl. tips)</td>
<td>Santa Barbara, California</td>
<td>07/01/2022</td>
<td>$500.00</td>
<td>$500.00</td>
</tr>
</tbody>
</table>

Total: $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
Q&A

expensehelp@ucdavis.edu