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.

Mike Kuhner

Assistant Vice Chancellor and Chief Procurement Officer

Supply Chain Management

SUPPLY CHAIN MANAGEMENT

UC DAVIS | SUPPLY CHAIN MANAGEMENT

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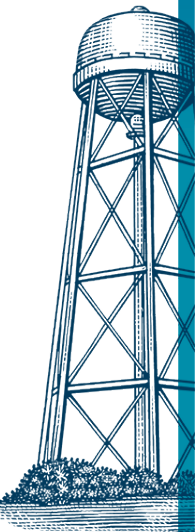
Agenda

- 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

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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

Lodging Itemization

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

Error Handling

Alerts will appear at the top of the report

Request Changes

- "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

Copy Request   Submit Request

Request Details ⌄   Print/Share ⌄   Attachments ⌄

CASH ADVANCES: 1
Amount
$1,000.00

EXPECTED EXPENSES

Add   Edit   Delete   Allocate

☐	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
☐	Airfare	Airfare	07/01/2022	$500.00	$500.00
☐	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

SUPPLY CHAIN MANAGEMENT

Q&A

expensehelp@ucdavis.edu