

## MyTravel Past System Enhancements

Ad-hoc approver customization allows the traveler or approver to send the report for additional approval.

The delegate/preparer field has been added to the report header.

The entertainment reports can now be created for non-employees.

Several field label and text changes have been made for better usability.

System now allows MyTravel system administrators to manage and add locations without any programmer intervention.

Split Expenses by Dollar or Percentage Customization. (March 2008)

Concur Expense 7.1 Patch Pack 22 & 23. (March 2008)

## MyTravel Future System Enhancements

### Customization to pay for Sodexo Entertainment Events directly through MyTravel

(Estimated rollout date – April/May 2008)

In July 2007, the IB docs were discontinued for Sodexo, leaving only corp card or out of pocket payment methods for Sodexo Entertainment Events. A process has been created within MyTravel to allow Sodexo to be paid directly through MyTravel for campus events. We plan to implement this new feature in April or May 2008.

### Connexus Travel Booking Tool (Estimated rollout date - 2008)

Connexus is the travel service, booking and reservation program for the entire UC System. The Connexus portal gives easy access to excellent UC Strategic Sourcing Agreement rates and discounts for airfare, hotels, and car rentals. Rollout at UC Davis is anticipated in the calendar year 2008. More information on Connexus can be found at <http://www.ucop.edu/purchserv/travelconnexus.html>

### Concur Expense 7.5 Release (Estimated rollout date – March 2009)

**Level 3 Corporate Card Data Support:** Concur Expense now has the ability to import, store and view level 3 data (itemized or addendum data) if provided by the card vendors. This supplementary information can be displayed to the user, approver and delegates. A new icon on the Company Card page indicates that the transaction has level 3 data available for viewing. (Examples, Air travel, car rental, Lodging)

### Per Diem Travel/ Travel Allowance

Numerous improvements have been made to the per-diem feature. These are meant to facilitate an easier process of creating, finding and assigning itineraries to reports. These improvements include:

- **Creating an itinerary from within an expense report:** The user is no longer required to navigate to the Itinerary List page to create an itinerary. A link now exists in the expense report to create an itinerary.
- **Automatic assignment of itineraries to the expense report:** Itineraries created within the expense report are assumed to be assigned to the current report. This prevents additional steps to assign the itinerary to the report.
- **Automatic population of itinerary row fields:** Several fields automatically populate within the itinerary rows based on the assumption that a majority of users are creating round trip itineraries. Example, the Departure Date is copied to the Arrival Date of the same row, the Arrival Location from the previous itinerary row is copied to the Departure Location of the next itinerary row.

- **Display meals rate field on the Fixed Per-Diem page:** The meals rate being used for each per-diem day is displayed to the user. This is an optional column.
- **Multiple Use of a Day Itineraries:** The ability to create multiple travel allowance itineraries that start and/or stop on the same day has been provided.
- **'Recent Itineraries' Itinerary List filter:** This configurable filter selection ensures that employees can view their most recent itineraries (default is within 15 days).

**Expense Entry and Report Copy:** The ability to copy a report or specific expense entries within a report is provided through this enhancement. The newly created report or entry is still subject to all of the event-based validations, rules and conditions that are active at the time the copy is made.

**Report Recall:** This feature allows you to recall a report even after the report is submitted. The recall feature can be used, if you find an error or have missed a receipt and want to resubmit the report after making necessary changes. Depending on the company policy, a recall link will appear on the Expense Report List page to recall the expense report even if the report is approved.

**Imported expense matching:** This feature has been updated to better handle the matching of company card transactions with existing expenses. An icon is available when a transaction “matches” an existing entry.

**Usability Enhancements:** Numerous changes have been made to the user interface. Some of the more notable changes include, improved helper scrolling, consistent fonts, colors and links, and updated instructional text.

### **Other System Changes (Date to be determined)**

Non-employee setup: Allow addition of delegates after a non-employee profile has been created.

DS reports: Allow departments to view unassigned imported expense transactions.