

Concur Release Notes TripLink	
Month	Audience
February 2014	Concur Clients

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# Summary

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## New Features

- Standard Travel and Expense clients can enter TripLink discount codes
- Standard Expense-only clients can configure travel policy for TripLink
- IHG Hotels application coming soon

# Release Notes

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## TripLink App for IHG Hotels – Coming Soon

### Overview

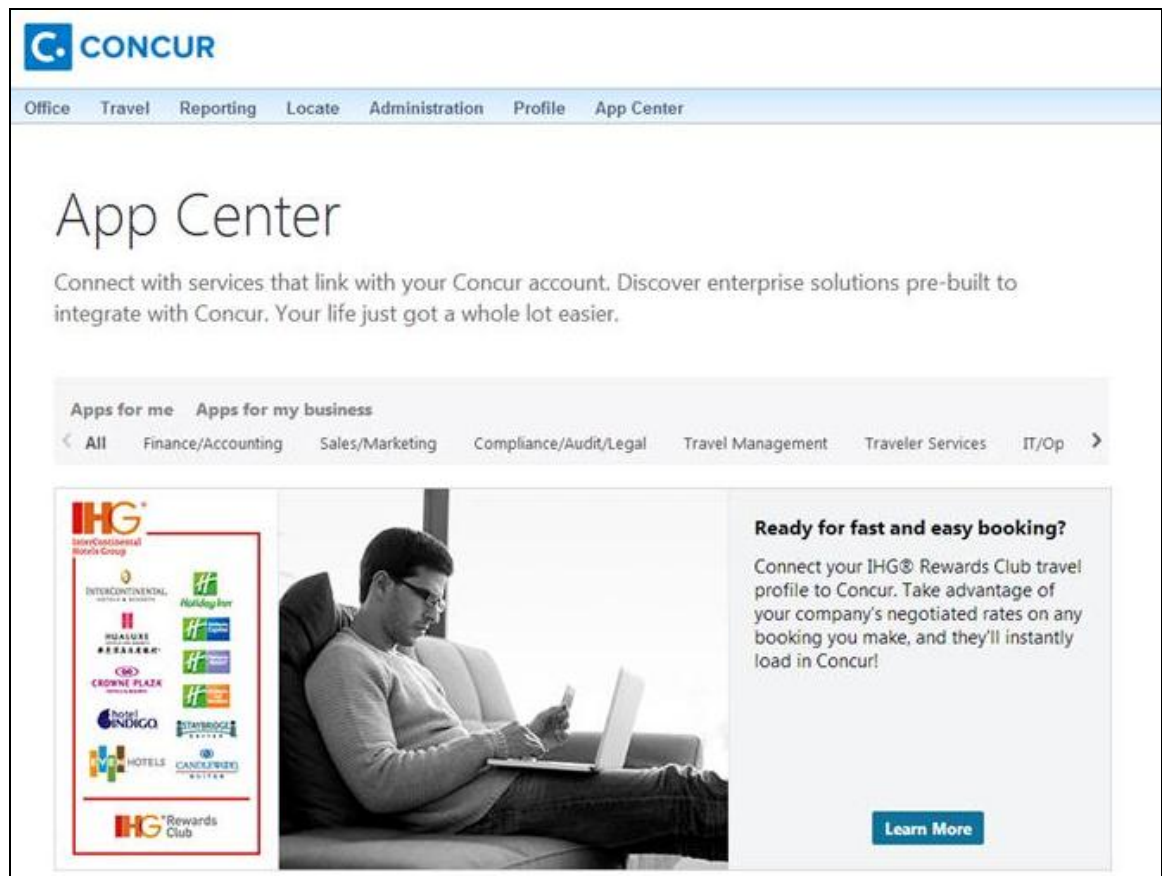
Concur will soon release a new TripLink application for IHG hotel customers. This application allows users to connect their Concur account with their IHG Rewards Club account. Users may have an existing IHG account or create a new one. After connecting their accounts, the users can make reservations on [ihg.com](http://ihg.com) and get their negotiated corporate discount for IHG properties. IHG will post the bookings made on [ihg.com](http://ihg.com) to the user's Concur account.

### BUSINESS PURPOSE / CLIENT BENEFIT

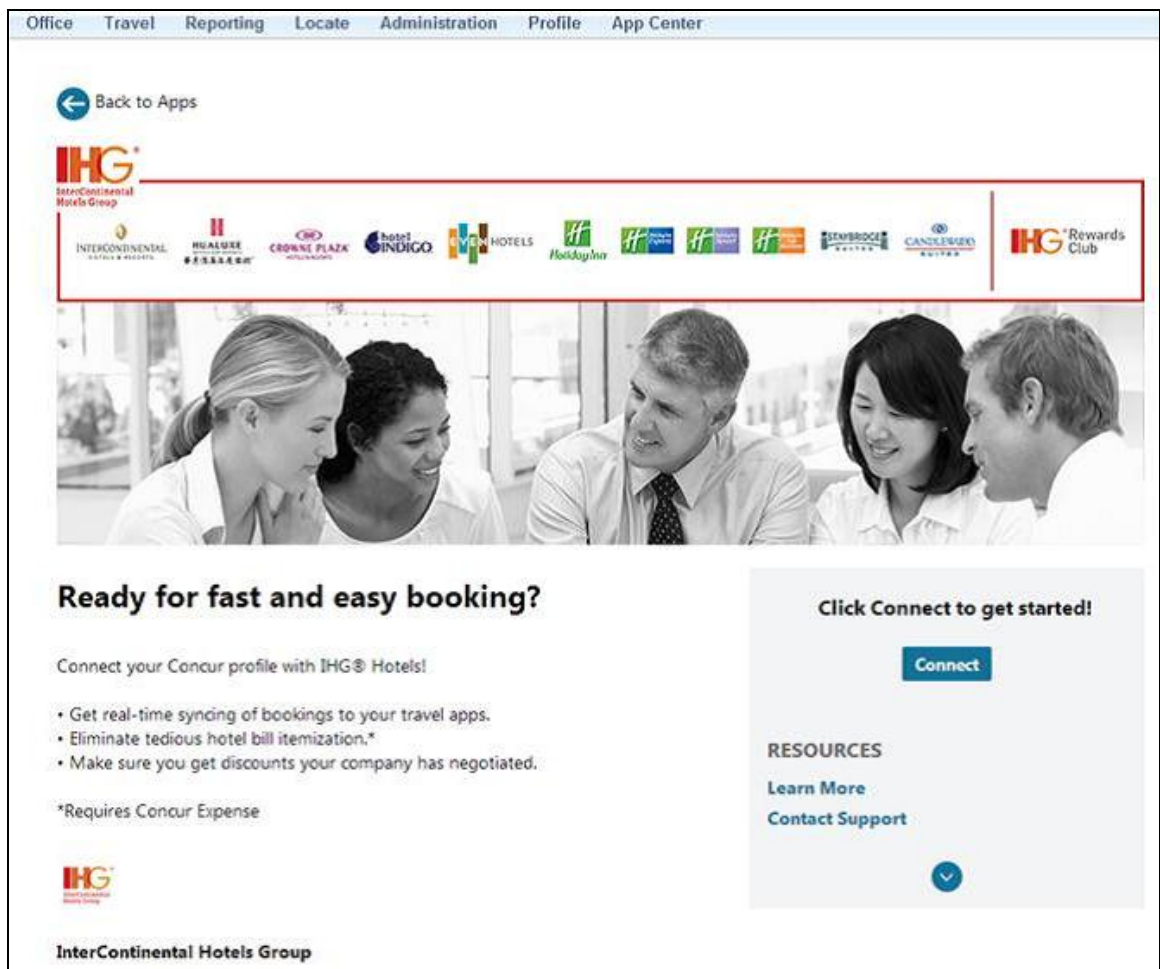
This application allows users to utilize their corporate discounts while booking on the IHG website.

### What the User Sees

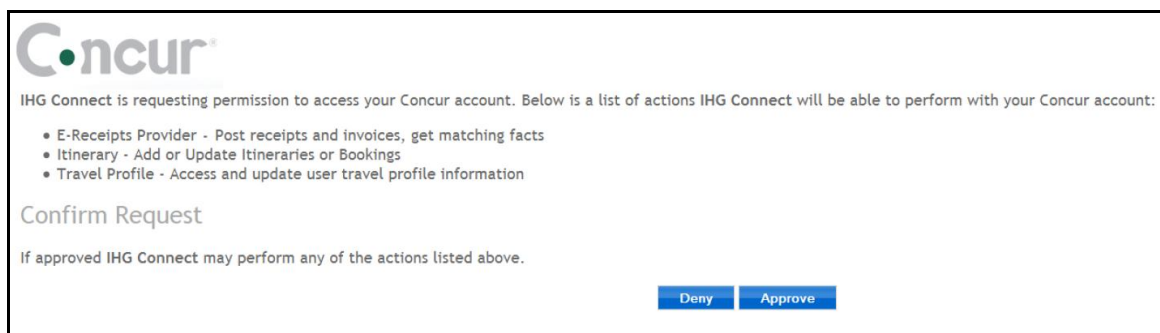
The user sees the IHG application on the **App Center** page.



The user clicks **Learn More** to view the application details.



The user clicks **Connect** to link their Concur account with IHG. The user is prompted to authorize IHG to access their data:



The user clicks **Approve**, then IHG checks to see if they recognize the user in one of these ways:

- The user is already logged in to IHG

- The user has an IHG cookie in their browser
- The user has an IHG Rewards Club number in their travel profile in Concur

If the user is not recognized, they are prompted to create a new IHG account:

Explore Our IHG Family of Brands:

IHG Corporate | Customer Care | Travel Advisory | English

Sign In

Reservations
Offers
About IHG
IHG Rewards Club

## Join IHG® Rewards Club

Unleash the power of your points. IHG® Rewards Club offers you more ways to redeem your points than any other hotel loyalty program. Experience the ultimate flexibility. Redeem when you want, for what you want, your points never, ever expire and there are no blackout dates. It's time to experience a loyalty program that actually rewards you. They're your points....YOU decide how to use them.

To begin your free membership, please complete the form below.

★ Indicates required field

### Account Information

Title
First Name ★ demo
Last Name ★ UserIHG
Email Address ★ demo1@ihg.com Why do we collect your email address?
Verify Email Address ★ demo1@ihg.com
Create PIN ★ (4-digit number)
Verify PIN ★

Make note of your PIN for future use.

### Mailing Address

Address Type ★ Residence Business
Street Address ★ 3 Ravinia Drive Home
Additional Address Information

If the user is recognized but not logged in, they are prompted to log in:

The screenshot shows the IHG Rewards Club Sign In page. At the top, there is a navigation bar with the IHG logo and various hotel brands. Below the navigation bar, there is a red banner with the text "IHG® Rewards Club Sign In". Underneath the banner, a message states: "The page you are trying to view requires IHG® Rewards Club membership. Please sign in to continue." Below this message, there is a sign-in form with fields for "Email or IHG® Rewards Club #" and "PIN". The "Email or IHG® Rewards Club #" field contains the text "800003004" and the "PIN" field contains four dots. There are links for "Forgot PIN" and "Create PIN" next to the PIN field. A "SIGN IN" button is located below the form. To the right of the form, there is a section titled "Not an IHG® Rewards Club Member?" with the text "Join now and get great rewards:". Below this text, there is a list of benefits: "Earn points at over 4,500 hotels.", "Redeem points for free nights, airlines and more.", and "Points never expire and no blackout dates." A "JOIN NOW" button is located at the bottom right of this section.

Once the user is logged in, they are shown a confirmation message that they now have a Concur travel profile in IHG:

The screenshot shows the IHG Rewards Club My Travel Profiles page. At the top, there is a navigation bar with the IHG logo and various hotel brands. Below the navigation bar, there is a red banner with the text "My Travel Profiles". Underneath the banner, there is a message stating: "As an IHG® Rewards Club member you can have separate travel profiles for your business, leisure, or group travel needs." Below this message, there is a confirmation message box titled "Concur Travel Profile" with the text: "A new Concur travel profile has been created for you. When booking business travel, select your Concur profile. Reservation information will automatically be transmitted to Concur." The message box has a "CLOSE" button. Below the message box, there is a table with the following data:

Concur Connect Suppliers-26	Concur	Delete	Rename
IHG			

Below the table, there is an "ADD TRAVEL PROFILE" button. At the bottom of the page, there is a note: "\* Each IHG® Rewards Club account must have at least one (1) travel profile. This is your primary profile, and it can't be deleted."

If the user was already logged in to IHG, they immediately see the Concur Travel Profile message.

The user can now select the Concur travel profile when booking a hotel stay on the IHG website, and receive their corporate discount rate. The bookings made on ihg.com by the user with the Concur travel profile will be sent by IHG to Concur.

## Configuration

This application will be available to all TripLink clients. The administrator must configure the corporate discount code to allow users to access it.

### Professional Clients

The administrator logs in to Concur and clicks **Administration > Company Admin > Manage Corporate Discounts** (in the left menu under **Travel Administration**).

If there is not a discount defined for IHG, the administrator clicks **Add hotel chain discount**.

Administering discounts for: Nounish

Choose a company travel configuration. Choose a GDS Type

No Travel Config selected - manage company-wide discounts Choose Apollo

[Add System-wide Air Discount](#)

[Add air discount](#)

**Air Vendors**

Vendor	Discount Type	Discount Code	TripLink Discount Code	Days Advance	Meeting Name	Valid From	Valid Until	Preference
No records found.								

[Add hotel chain discount](#)

**Hotel Vendors**

Vendor	Discount Code	TripLink Discount Code	CD Number	Valid From	Valid Until	Preference
No records found.						

If there is already a discount configured for IHG, the administrator clicks the vendor name to edit it:

[Add hotel chain discount](#)

**Hotel Vendors**

Vendor	Discount Code	TripLink Discount Code	CD Number	Valid From	Valid Until	Preference
<a href="#">Intercontinental Hotels Group</a>	987654321			1/1/2013	1/1/2015	Company Most Preferred

The administrator enters their Corporate ID (IHG's name for the discount code) in the **TripLink Discount Code** field, and clicks **Save**.

**Company-wide Hotel discount for Nounish**

Intercontinental Hotels Group

Preference Discount Code  **TripLink Discount Code**   CD Number

Valid From  Valid Until

Discounted Fees

Breakfast ☐ Free

Parking ☐ Free

Internet ☐ Free

Wireless Internet

## Standard Travel Clients

The administrator selects **Setup > Travel > Discounts and Travel Content**.

Welcome, Chris Miller Help | Log Out

**CONCUR**

My Concur Travel Expense Reporting Administration **Setup** Profile

Expense **Travel**

**Setup Wizard** — Welcome to the setup of **Brooks Development** Previous Next

**Discounts and Travel Content** Watch a video on this step

This step allows you add vendor discounts, enable direct connect providers and import hotel property discounts.

Please select the travel configuration you want to update.  
Brooks Development 314 (US)

To add a vendor discount, click Add Air Discount, Add hotel Chain Discount, etc. Please work with your fulfillment travel agency for details. Your agency will provide the codes needed to access your discounts. To import hotel property discounts, click the Import Hotel Discounts tab. To enable a direct connect provider, click the Direct Connects tab.

**Discounts** Hotel Import/Export Direct Connect Visa / Passport Services Travelfusion Web Fare Suppliers

[Add Air Discount](#)

Air Vendors

Vendor	Discount Type	Discount Code	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.						

[Add Hotel Chain Discount](#)

Hotel Vendors

Vendor	Discount Code	CD Number	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.						

[Add property-specific hotel discount](#)

Hotel Properties

Records 1 - 0 of 0 Records [All](#)

Vendor	Hotel Reference Name	Discount Code	CD Number	Property ID	Contract Rate	Preference
No records found.						

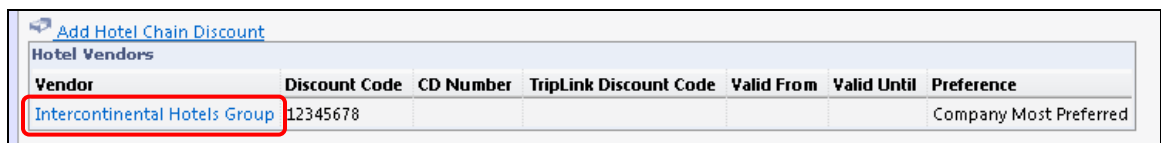


If there is not a discount defined for IHG, the administrator clicks **Add Hotel Chain Discount**.



The screenshot shows a web interface with a header bar containing a blue link 'Add Hotel Chain Discount' and a tab labeled 'Hotel Vendors'. Below the header is a table with the following columns: Vendor, Discount Code, CD Number, TripLink Discount Code, Valid From, Valid Until, and Preference. The table body is empty, displaying the text 'No records found.' in the center.

If there is already a discount configured for IHG, the administrator clicks the vendor name to edit it.



The screenshot shows the same web interface as before, but the table now contains one record. The 'Vendor' column has a red box around the text 'Intercontinental Hotels Group'. The 'Discount Code' column contains the value '12345678'. The 'Preference' column contains the text 'Company Most Preferred'.

The administrator enters their Corporate ID (IHG's name for the discount code) in the **TripLink Discount Code** field, and clicks **Save**.

**Add Discount**

**Hotel Discount for Travel Config: Brooks Development (US)**

Save Cancel

To add a hotel chain discount, complete the fields below. Your fulfillment travel agency will provide the discount code. You may also highlight a vendor even if you do not have a discount by not adding a discount code or CD number. Text added to the Notes section will display to users beside each property under this chain. Be sure to click Save before moving on to the next step.

Vendor  
 Intercontinental Hotels Group Super chains have this background color.  
 Major vendors have this background color.

**TripLink Discount Code**  
 0987654321

Preference Discount Code CD Number  
 Most Preferred

Valid From Valid Until

Discounted Fees  
 Breakfast Free  
 Parking Free

## Standard Clients Can Enter TripLink Discount Codes

### Overview

The Concur Standard clients (with Travel and Expense) can now enter their TripLink discount codes.

### BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows Standard clients to use corporate discounts when booking with TripLink Suppliers.

## Configuration

The administrator must enter the TripLink discount code in the company configuration to allow the users to utilize it.

The administrator selects **Setup > Travel > Discounts and Travel Content**.

The screenshot shows the Concur Setup Wizard interface. At the top, it says "Welcome, Chris Miller" and "Help | Log Out". The main navigation bar includes "My Concur", "Travel", "Expense", "Reporting", "Administration", "Setup", and "Profile". The "Setup" tab is active, and the "Travel" sub-tab is selected. The "Setup Wizard" section indicates "Welcome to the setup of Brooks Development" with "Previous" and "Next" buttons. The current step is "Discounts and Travel Content", which includes a sub-header "This step allows you add vendor discounts, enable direct connect providers and import hotel property discounts." and a "Watch a video on this step" link. A left-hand menu lists 14 steps, with "8) Discounts and Travel Content" highlighted. The main content area has a dropdown menu set to "Brooks Development 314 (US)". Below this, there are instructions on how to add discounts. A series of tabs are visible: "Discounts", "Hotel Import/Export", "Direct Connect", "Visa / Passport Services", and "Travelfusion Web Fare Suppliers". The "Discounts" tab is active, showing three sections: "Add Air Discount" (Air Vendors), "Add Hotel Chain Discount" (Hotel Vendors), and "Add property-specific hotel discount" (Hotel Properties). Each section contains a table with columns for Vendor, Discount Type/Code, Discount Code, TripLink Discount Code, Valid From, Valid Until, and Preference. All three tables currently display "No records found." A mouse cursor is pointing at the "Add Hotel Chain Discount" link.

If there is not a discount defined for the vendor, the administrator clicks **Add <vendortype> Discount**.

This is a close-up of the "Add Hotel Chain Discount" section from the previous screenshot. It shows the "Hotel Vendors" header and a table with columns: "Vendor", "Discount Code", "CD Number", "TripLink Discount Code", "Valid From", "Valid Until", and "Preference". The table is empty, displaying "No records found." A mouse cursor is clicking on the "Add Hotel Chain Discount" link above the table.

If there is already a discount configured for the vendor, the administrator clicks the vendor name to edit it.

Add Hotel Chain Discount						
Hotel Vendors						
Vendor	Discount Code	CD Number	TripLink Discount Code	Valid From	Valid Until	Preference
Intercontinental Hotels Group	12345678					Company Most Preferred

The administrator enters their discount code in the **TripLink Discount Code** field, and clicks **Save**.

Add Discount

Hotel Discount for Travel Config: Brooks Development (US)

Save Cancel

To add a hotel chain discount, complete the fields below. Your fulfillment travel agency will provide the discount code. You may also highlight a vendor even if you do not have a discount by not adding a discount code or CD number. Text added to the Notes section will display to users beside each property under this chain. Be sure to click Save before moving on to the next step.

Vendor

Intercontinental Hotels Group
Super chains have this background color. Major vendors have this background color.

TripLink Discount Code
0987654321

Preference
Most Preferred
Discount Code
CD Number

Valid From
Valid Until

Discounted Fees
Breakfast
Free
Parking
Free

# Standard Expense Only Clients Can Now Set TripLink Travel Policy Rules

## Overview

In July 2013, Concur's extensive system of travel policy rules were expanded to include TripLink reservations. With this release, Expense-only clients on Concur's Standard Edition can now apply travel policy rules to all TripLink reservations imported into the Concur system.

There is a new **Travel** section added to the Setup Wizard which will allow the admin to define the Travel Policy, and create Travel rules that will apply to TripLink itineraries. This includes itineraries sent into [plans@concur.com](mailto:plans@concur.com), [plans@tripit.com](mailto:plans@tripit.com), added manually, or received via a web service from the TMC or a direct supplier.

This feature allows a customer to apply their corporate policy, regardless of where the trip was booked.

Example: If the policy says bookings with non-preferred vendors are out of policy, then this can apply to TripLink bookings. The same could apply for rates. If the policy says hotel rooms over \$200/night are out of policy, we can apply this to TripLink itineraries.

TripLink itineraries are already confirmed by the time they come into Concur, so the two options we will offer are:

- **Log for Reports:** Rule violations will be logged to a report available within the Concur TripLink section of Reports.
- **Notify Manager:** Rule violations will be logged to a report available within the Concur TripLink section of Reports. An email notification is also sent to the user's manager, defined on the **User Details** page. Or, on the **Travel Rules** page, you may designate one person to receive all notifications for the selected Travel Policy.

In either case, the user/arranger receives an alert via email notifying them that a rule was violated.

The rules can be applied to all TripLink trips and/or to specific segment types (air, car, hotel).

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**NOTE:** TripLink Travel Policy is now available for TripLink customers with Concur Travel, Concur Expense, or Concur Travel & Expense.

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## BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows clients who do not use Concur Travel to apply travel policy rules to TripLink itineraries at the time they are imported into Concur.

## Configuration

1. Click **Setup > Travel > Travel Policy**.

The admin can edit or rename the Travel Policies for the company. Concur creates two travel policies automatically for each configured country, in addition to a default travel class. Admins can edit their existing policies but cannot add or delete policies.

The screenshot shows the Concur Setup Wizard for the 'Standard Exp 303' policy. The 'Travel Policy' step is active, showing a list of existing policies for editing.

Travel Policy Name	Travel Configuration
(Edit) Default Travel Class	Standard Exp 303
(Edit) Travel Policy (US) Normal	Standard Exp 303 (US)
(Edit) Travel Policy (US) VIP	Standard Exp 303 (US)

2. Click **Travel Rules**.

The screenshot shows the Concur Setup Wizard for the 'Standard Exp 303' policy, now on the 'Travel Rules' step. It allows defining rules for travel policies, including enabling rules and setting thresholds for various travel expenses.

Please select the travel policy you want to update. Be sure to save your changes before moving on to the next step:

Default Travel Class

**Travel Rules**

To enable a rule, choose Log for Reports or Notify Manager from the list. Once you have enabled a rule, you can change the values associated with it. Be sure to save your changes before moving on to the next step.

**Concur TripLink**

Disabled	All Trips
Disabled	Car vendor is not preferred
Disabled	Car rate is greater than or equal to \$50.00 per day
Disabled	Hotel chain is not preferred
Disabled	Hotel property is not preferred
Disabled	Hotel rate is greater than or equal to \$200.00
Disabled	Air carrier is not preferred

Save

**Manager notification and approval**

Choose who will receive manager notifications and approval requests. Be sure to save your changes before moving on to the next step. Be sure to save your changes before moving on to the next step.

☒ Manager/Approver defined at the user level

☐ Manager/Approver defined at the travel policy level

Select Manager

Save

3. Select the desired Travel Policy.

Please select the travel policy you want to update. Be sure to save your changes before moving on to the next step:

Default Travel Class ▼

4. Enable the desired rule(s) by selecting *Notify Manager* or *Log for Reports*.

**Concur TripLink**

Disabled ▼	All Trips
Disabled ▼	Car vendor is not preferred
Disabled ▼	Car rate <i>greater than or equal to</i> ▼ \$50.00 per day
Disabled ▼	Hotel chain is not preferred
Disabled ▼	Hotel property is not preferred
Disabled ▼	Hotel rate is <i>greater than or equal to</i> ▼ \$200.00
Disabled ▼	Air carrier is not preferred
Log for reports	
Notify Manager	
Disabled	

5. If there is a value field, it will become editable once you have enabled the rule.

**Concur TripLink**

Disabled ▼	All Trips
Disabled ▼	Car vendor is not preferred
Disabled ▼	Car rate <i>greater than or equal to</i> ▼ \$50.00 per day
Disabled ▼	Hotel chain is not preferred
Disabled ▼	Hotel property is not preferred
Notify Manager ▼	Hotel rate is <i>greater than or equal to</i> ▼ \$200.00
Disabled ▼	Air carrier is not preferred
Save	

6. Click **Save**.
7. If the admin selected the *Notify Manager* setting for any rules, the **Manager notification and approval** section allows the admin to configure the system to send the notification to each individual user's manager, or designate one person to receive all notifications for the selected Travel Policy.

▼ **Manager notification and approval**

Choose who will receive manager notifications and approval requests. Be sure to save your changes before moving on to the next step. Be sure to save your changes before moving on to the next step.

☒ Manager/Approver defined at the user level ⓘ

☐ Manager/Approver defined at the travel policy level ⓘ  Select Manager

Save

8. Click **Save**.
9. Repeat, as needed, to set Travel Rules for other Travel Policy classes (e.g. VIP/Executive, etc.).

### ***What the Manager Sees***

If the rule violation is set to **Notify Manager** and a user submits a TripLink itinerary that violates the rule, then the manager will receive an email notification. This email will contain the following information:

- Alert that TripLink trip is out of policy
- Who the trip is for
- Who booked the trip
- The rule(s) that was violated
- Copy of the TripLink itinerary





## An Open Booking Trip is out of policy.

Hi William Never ,

This is a copy of the traveler's itinerary. Sam has submitted an open booking trip that is out of policy. It requires no action on your part.

### Travel Booked by: Jenn

#### Rule Violation(s):

Itinerary booked greater than or equal to 21 days in advance (V11)  
Itinerary has air segments (V02)

### Itinerary for: Sam

#### Trip Overview

Trip Name: my air trip  
Start Date: Jul 1, 2013  
End Date: Jul 8, 2013

#### ***What the User Sees***

If the rule violation is set to **Notify Manager** and a user submits a TripLink itinerary that violates the rule, then the user/arranger will receive an email notification. This email will contain the following information:

- Alert that TripLink trip is out of policy and the manager has been notified
- Who the trip is for
- Who booked the trip
- The rule(s) that was violated
- Copy of the TripLink itinerary



## Your Open Booking Trip is out of policy.

Hi Sam | ,

You have submitted an open booking trip that is out of policy. Your manager has been notified of this policy violation.

**Travel Booked by: Jenn**

### Rule Violation(s):

Itinerary booked greater than or equal to 21 days in advance (V11)  
Itinerary has air segments (V02)

**Itinerary for: Sam**

#### Trip Overview

Trip Name: my air trip

Start Date: Jul 1, 2013

End Date: Jul 8, 2013

Created: Jun 6, 2013 (Modified: Jun 6, 2013)

If the rule violation is set to **Log for Reports** and a user submits a TripLink itinerary that violates the rule, then the user/arranger will receive an email notification. This email will contain the following information:

- Alert that TripLink trip is out of policy and has been logged for reporting
- Who the trip is for
- Who booked the trip
- The rule(s) that was violated
- Copy of the TripLink itinerary



## Your Open Booking Trip is out of policy.

Hi Sam,

You have submitted an open booking trip that is out of policy. This policy violation has been logged for reporting.

**Travel Booked by: Jenn**

### Rule Violation(s):

Itinerary booked greater than or equal to 21 days in advance (V11)  
Itinerary has air segments (V02)

**Itinerary for: Sam**

#### Trip Overview

Trip Name: my air trip  
Start Date: Jul 1, 2013  
End Date: Jul 8, 2013  
Created: Jun 6, 2013 (Modified: Jun 6, 2013)  
Description: multiple segments  
Ticket Number(s): 2365262622656  
Total Estimated Cost: \$455.00 USD

#### Reservations

Monday Jul 1, 2013

## Resolved Issues

### Fixes

Key	Summary

Concur Release Notes TripLink	
Month	Audience
March 2014	Concur Clients

<b>Summary .....</b>	<b>1</b>
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# Summary

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## New Features

- Standard Expense only clients can enter TripLink discount codes

# Release Notes

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## Standard Expense Only Clients Can Enter TripLink Discount Codes

### Overview

Concur has added an enhancement that allows Standard Expense-only customers to enter discounts for vendors that are not stored in the GDS so these can be passed

to the vendor for application on TripLink trips. When end-users connect their Concur accounts to the TripLink vendor, they authorize Concur to share their travel profile information with the vendor, including their company's corporate discount codes. The vendor can use this information to apply the corporate discount code to the user's booking.

### **Business Purpose**

*This enhancement allows Standard clients to use corporate discounts when booking with TripLink Suppliers.*

### Configuration

The administrator must enter the TripLink discount code in the company configuration to allow the users to utilize it.

The administrator selects **Setup > Travel > Travel Discounts**.

My Concur

Travel

Expense

Administration

Setup

Profile

Expense

Travel

Setup Wizard

undefined:BrooklynAdmin-brkSetupWizardWelcome

Travel Discounts

This step allows you to add vendor discounts for TripLink enabled suppliers.

1) Travel Policy

2) Travel Rules

3) Travel Discounts

Please select the travel configuration you want to update.

TNT RQA3 Standard Expense

To add a vendor discount, click Add Air Discount , Add hotel Chain Discount, etc.

Add Air Discount

Air Vendors

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.				

Add Hotel Chain Discount

Hotel Vendors

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
--------	------------------------	------------	-------------	------------

Click **Add <vendortype> discount** for the desired vendor type.

Please select the travel configuration you want to update.  
TNT RQA3 Standard Expense ▼

To add a vendor discount, click Add Air Discount , Add hotel Chain Discount, etc.

 [Add Air Discount](#)


**Air Vendors**

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.				

 [Add Hotel Chain Discount](#)


**Hotel Vendors**

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.				

 [Add car discount](#)

**Car Vendors**

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.				

 [Add rail discount](#)

**Rail Vendors**

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.				



On the discount page, select the vendor, enter the TripLink discount code and save changes.

**Add Discount**

**Car Discount for Travel Config: TNT RQA3 Standard Expense**

Save Cancel

To add a car discount, complete the fields below. Be sure to click Save before moving on to the next step.

Vendor  
Avis

TripLink Discount Code  
PROMO1

Preference Most Preferred

Valid From Valid Until

Save Cancel

The TripLink discount code will appear on the **Travel Discounts** step.

My Concur Travel Expense Administration Setup Profile

Expense Travel

### Setup Wizard

#### Travel Discounts

This step allows you to add vendor discounts for TripLink enabled suppliers.

1) Travel Policy  
2) Travel Rules  
3) Travel Discounts

Please select the travel configuration you want to update.  
TNT RQA3 Standard Expense

To add a vendor discount, click Add Air Discount , Add hotel Chain Discount, etc.

[Add Air Discount](#)

**Air Vendors**

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.				

[Add Hotel Chain Discount](#)

**Hotel Vendors**

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.				

[Add car discount](#)

**Car Vendors**

Vendor	TripLink Discount Code	Valid From	Valid Until	Preference
Avis	PROMO1			Most Preferred

## Resolved Issues

### Fixes

Key	Summary

<div> Concur Release Notes </div> <div> TripLink </div>	
Month	Audience
<div>April 2014</div> <div>Updated: May 1 2014</div>	Concur Clients

Summary .....

New Features .....

Release Notes .....

Trip Status Field in Trip Library or Trip List Now Displays Status Instead of Concur TripLink.....

Resolved Issues .....

Fixes .....

1

1

2

2

2

2

# Summary

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## New Features

- Trip Status in the Trip Library or Trip List will now display the actual status instead of Concur TripLink

# Release Notes

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## Trip Status Field in Trip Library or Trip List Now Displays Status Instead of Concur TripLink

### Overview

Prior to this release, the Status column in the Trip List or Trip Library would show the term Concur TripLink if a travel segment was added to Concur using TripLink. In the April release, this column is updated to include the actual trip segment status.

### Business Purpose

*This enhancement aligns the Status of TripLink bookings with that of other bookings to provide the user with consistent information.*

### Configuration

No additional configuration is required for this feature.

## Resolved Issues

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### Fixes

Key	Summary

## **Legal Notice**

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Concur Release Notes	
TripLink	
Month	Audience
May 2014 Update #1: Wednesday, May 21, 4:40 PM PT	Concur Clients FINAL

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# Release Notes

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## **\*\*Coming Soon\*\* The Concur User Experience Evolution**

Organizations and their end users are holding their enterprise solutions to higher standards as the requirements of their business change – wanting their enterprise solutions to be intuitive, effortless, integrated, and efficient. Concur is committed to delivering the best Travel, Expense, Invoice, and related solutions for its 20,000+ clients worldwide, and is building a solid foundation that will be leveraged to meet these challenges.

The Concur User Experience Evolution is a key initiative that will accomplish three primary goals.

- Modernize the user experience and increase the usability of Concur applications, while maintaining the ability to apply and enforce company policies
- Implement features and functionality in a manner that provides clients with the maximum benefits for their Travel, Expense, and Invoicing needs, while minimizing change-management impacts
- Allow effortless navigation and access to features for all products on the web and mobile devices

Concur's goal is to continue to enhance the user experience to ensure products meet each client's evolving needs. This, along with technology and competitive influencers, are key inputs to internal strategies and used to inspire innovation. As Concur drives to provide the best solutions for clients, Concur will continue to improve the interface to meet that need. The evolving user experience will start in 2014 and will be ongoing as Concur continues to strive for excellence in partnership with clients.

Specific product lines impacted are:

- Travel (Standard, Professional)
- Expense (Standard, Professional, Small Business)
- Invoice Management (Standard, Professional)
- Request (Professional)
- TripLink

Key features and enhancements are:

- Enhanced Home and Expense pages with effortless navigation and a modern consumer-based application "Look-and-Feel"
- A streamlined travel summary and booking workflow process
- Consistent terminology and iconography – across all product lines including Travel, Expense, and Invoice

- A dashboard design with logical grouping of like functions and tasks to minimize the number of popups or pages required to complete a specified task
- A facts and stats section with key metrics and other helpful information for the user
- Actions, alerts, and notifications that are clearly defined and visible
- Vastly improved smart matching of expenses and receipts as a result of combining key functions on the same page
- Easy access to help, support, and other key resources

## Schedule

Implementation of the enhanced UI will start for select clients in August 2014. General release is scheduled to begin in October 2014 and will run through early 2015. General release clients will be allowed to preview the enhanced interface and related changes during this period. They can toggle between the current interface and the enhanced one, as required for their specific needs.

## Resources

Concur will launch a formal communication and client engagement plan that will run through implementation and include webinars, videos, formal messaging, and an online website dedicated to the evolution. Clients can also leverage standard support channels as well as social media to stay informed or provide feedback.

# TripLink App for IHG Hotels Now Available

## Overview

Concur has released a new TripLink application for IHG hotel customers. This application allows users to connect their Concur account with their IHG Rewards Club account. Users may have an existing IHG account or create a new one. After connecting their accounts, the users can make reservations on [ihg.com](http://ihg.com) and get their negotiated corporate discount for IHG properties. IHG will post the bookings made on [ihg.com](http://ihg.com) to the user's Concur account.

### BUSINESS PURPOSE / CLIENT BENEFIT

This application allows users to utilize their corporate discounts while booking on the IHG website. Bookings made on [ihg.com](http://ihg.com) are automatically brought into Concur TripLink without a need to email to [plans@tripit.com](mailto:plans@tripit.com) or [plans@concur.com](mailto:plans@concur.com) providing immediate visibility into traveler spend and monitoring for policy rules, if applicable.

## What the User Sees

The user sees the IHG application on the **App Center** page.




OfficeTravelReportingLocateAdministrationProfileApp Center

# App Center


Connect with services that link with your Concur account. Discover enterprise solutions pre-built to integrate with Concur. Your life just got a whole lot easier.

Apps for meApps for my business

< All Finance/Accounting Sales/Marketing Compliance/Audit/Legal Travel Management Traveler Services IT/Op >



**IHG®**  
InterContinental  
Hilton  
Holiday Inn  
HUALUXE  
CROWNE PLAZA  
Hotel INDIGO  
HOTELS  
CANDIDUS  
IHG® Rewards Club

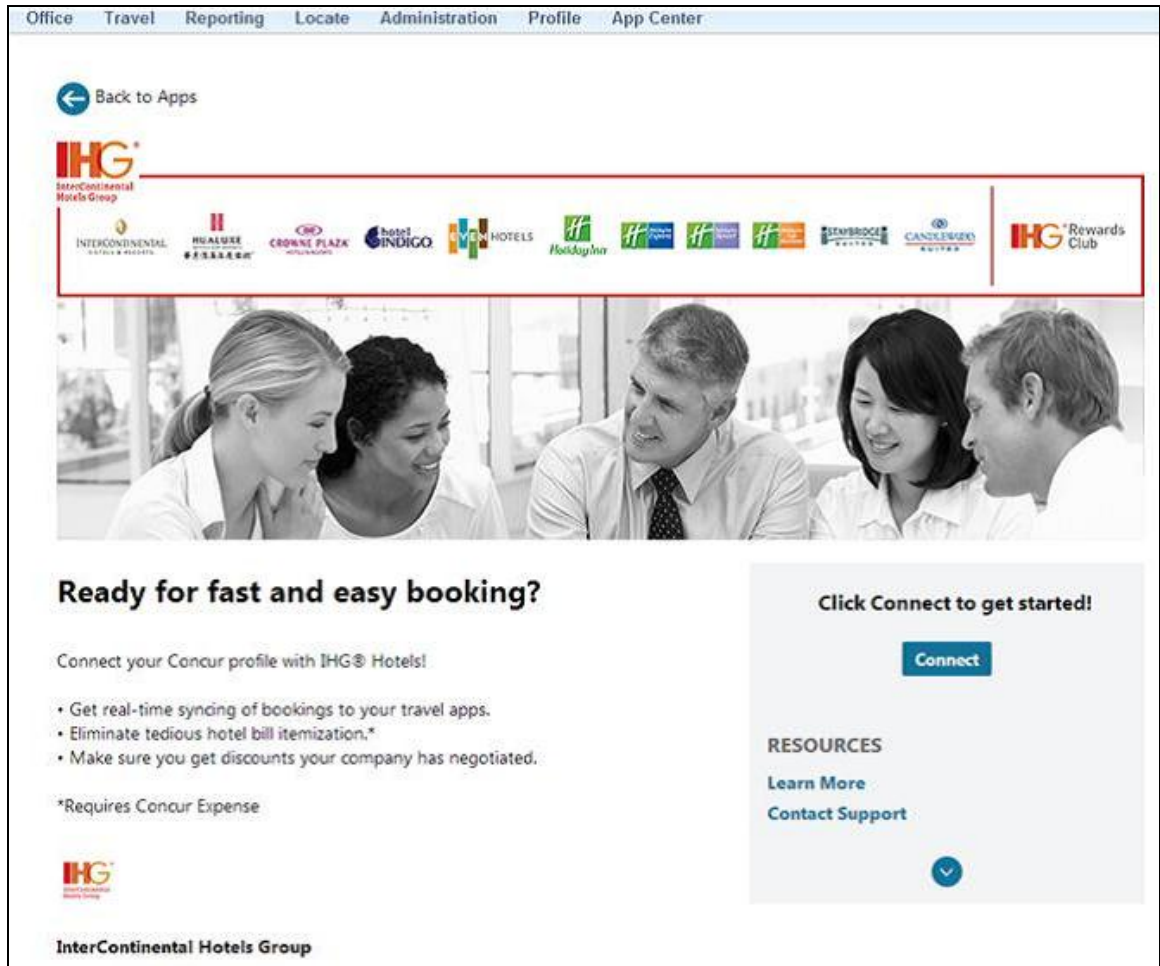


**Ready for fast and easy booking?**

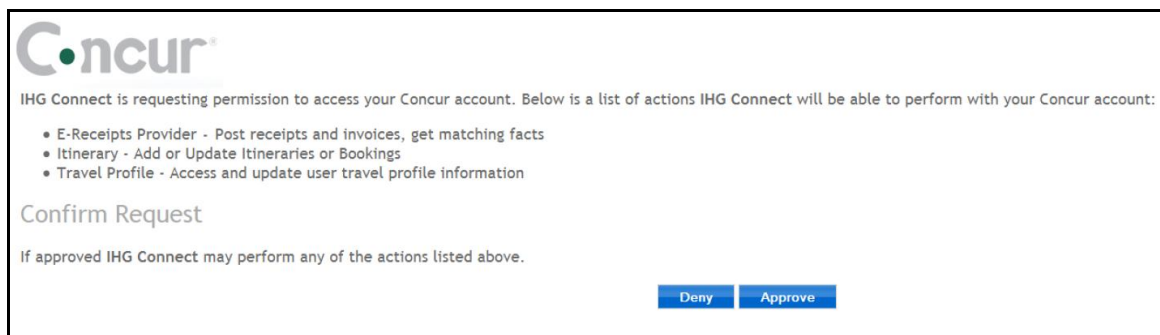
Connect your IHG® Rewards Club travel profile to Concur. Take advantage of your company's negotiated rates on any booking you make, and they'll instantly load in Concur!

[Learn More](#)

The user clicks **Learn More** to view the application details.



The user clicks **Connect** to link their Concur account with IHG. The user is prompted to authorize IHG to access their data:





The user clicks **Approve**, then IHG checks to see if they recognize the user in one of these ways:


- The user is already logged in to IHG
- The user has an IHG cookie in their browser
- The user has an IHG Rewards Club number in their travel profile in Concur


If the user is not recognized, they are prompted to create a new IHG account:


Explore Our IHG Family of Brands:







































IHG Corporate | Customer Care | Travel Advisory | English

[Sign In](#)




InterContinental  
Hotels Group

Reservations

Offers

About IHG





+

## Join IHG® Rewards Club

Unleash the power of your points. IHG® Rewards Club offers you more ways to redeem your points than any other hotel loyalty program. Experience the ultimate flexibility. Redeem when you want, for what you want, your points never, ever expire and there are no blackout dates. It's time to experience a loyalty program that actually rewards you. They're your points.....YOU decide how to use them.

To begin your free membership, please complete the form below.



★ Indicates required field

### Account Information

Title

First Name ★

Last Name ★

Email Address ★

[Why do we collect your email address?](#)

Verify Email Address ★

Create PIN ★

(4-digit number)

Verify PIN ★

Make note of your PIN for future use.

### Mailing Address

Address Type ★

☒ Residence ☐ Business

Street Address ★

[+ Additional Address Information](#)

If the user is recognized but not logged in, they are prompted to log in:

The screenshot shows the IHG Rewards Club Sign In page. At the top, there's a navigation bar with the IHG logo and various brand logos (InterContinental, Holiday Inn, Crowne Plaza, etc.). Below the navigation bar, there's a red banner with the text "IHG® Rewards Club Sign In". Underneath the banner, a message states: "The page you are trying to view requires IHG® Rewards Club membership. Please sign in to continue." Below this message, there's a sign-in form with fields for "Email or IHG® Rewards Club #\*" and "PIN\*", both marked with a red asterisk to indicate they are required fields. The email field contains the text "800003004" and the PIN field contains four dots. There are links for "Forgot PIN" and "Create PIN" next to the PIN field. A "SIGN IN" button is located below the form. To the right of the form, there's a section titled "Not an IHG® Rewards Club Member?" with the text "Join now and get great rewards:". Below this, there's a list of benefits: "Earn points at over 4,500 hotels.", "Redeem points for free nights, airlines and more.", and "Points never expire and no blackout dates." At the bottom right of this section is a "JOIN NOW" button.

Once the user is logged in, they are shown a confirmation message that they now have a Concur travel profile in IHG:

The screenshot shows the IHG Rewards Club "My Travel Profiles" page. At the top, there's a navigation bar with the IHG logo and various brand logos. Below the navigation bar, there's a red banner with the text "My Travel Profiles". Underneath the banner, there's a section titled "Account Status & Activity" with a sub-section "Personal Information". To the right of this section, there's a message: "As an IHG® Rewards Club member you can have separate travel profiles for your business, leisure, or group travel needs." Below this message, there's a confirmation message box titled "Concur Travel Profile" with a "CLOSE" button. The message says: "A new Concur travel profile has been created for you. When booking business travel, select your Concur profile. Reservation information will automatically be transmitted to Concur". Below the message box, there's a table with one row: "Concur Connect Suppliers-26 Concur IHG". To the right of this row are "Delete" and "Rename" buttons. Below the table is an "ADD TRAVEL PROFILE" button. At the bottom of the page, there's a note: "\* Each IHG® Rewards Club account must have at least one (1) travel profile. This is your primary profile, and it can't be deleted." On the left side of the page, there's a sidebar with a list of links: "Account Status & Activity", "Personal Information", "My Hotel Reviews", "Communication Preferences", "My Travel Profiles", "Room/Rate Preferences", "Billing Preferences", "Favorite Destinations", "My Offer Status", "Upcoming Reservations", "Meetings And Events", "Member Materials", and "Print Member Card".

If the user was already logged in to IHG, they immediately see the Concur Travel Profile message.

The user can now select the Concur travel profile when booking a hotel stay on the IHG website, and receive their corporate discount rate. The bookings made on ihg.com by the user with the Concur travel profile will be sent by IHG to Concur.

## Configuration

This application will be available to all TripLink clients. The administrator must configure the corporate discount code to allow users to access it.

### Professional Clients

The administrator logs in to Concur and clicks **Administration > Company Admin > Manage Corporate Discounts** (in the left menu under **Travel Administration**).

If there is not a discount defined for IHG, the administrator clicks **Add hotel chain discount**.

Administering discounts for: Nounish

Choose a company travel configuration. Choose a GDS Type

No Travel Config selected - manage company-wide discounts Choose Apollo

[Add System-wide Air Discount](#)

[Add air discount](#)

**Air Vendors**

Vendor	Discount Type	Discount Code	TripLink Discount Code	Days Advance	Meeting Name	Valid From	Valid Until	Preference
No records found.								

[Add hotel chain discount](#)

**Hotel Vendors**

Vendor	Discount Code	TripLink Discount Code	CD Number	Valid From	Valid Until	Preference
No records found.						

If there is already a discount configured for IHG, the administrator clicks the vendor name to edit it:

[Add hotel chain discount](#)

**Hotel Vendors**

Vendor	Discount Code	TripLink Discount Code	CD Number	Valid From	Valid Until	Preference
<a href="#">Intercontinental Hotels Group</a>	987654321			1/1/2013	1/1/2015	Company Most Preferred

The administrator enters their Corporate ID (IHG's name for the discount code) in the **TripLink Discount Code** field, and clicks **Save**.

**Company-wide Hotel discount for Nounish**

Intercontinental Hotels Group

Preference Discount Code  **TripLink Discount Code**   CD Number

Valid From  Valid Until

Discounted Fees

Breakfast ☐ Free

Parking ☐ Free

Internet ☐ Free

Wireless Internet

## Standard Travel Clients

The administrator selects **Setup > Travel > Discounts and Travel Content**.

Welcome, Chris Miller [Help](#) [Log Out](#)

**CONCUR**

My Concur Travel Expense Reporting Administration **Setup** Profile

Expense **Travel**

**Setup Wizard** — Welcome to the setup of **Brooks Development**

**Discounts and Travel Content** [Watch a video on this step](#)

This step allows you add vendor discounts, enable direct connect providers and import hotel property discounts.

1) Travel Policy  
2) Travel Rules  
3) Configurable Messaging  
4) Custom Text  
5) Policy Violation Codes  
6) Company Locations  
7) Form of Payment  
**8) Discounts and Travel Content**  
9) Custom Trip Fields  
10) Custom Profile Fields  
11) Unused Tickets  
12) Site Customization  
13) Users  
14) Agency Settings

Please select the travel configuration you want to update.

To add a vendor discount, click Add Air Discount, Add hotel Chain Discount, etc. Please work with your fulfillment travel agency for details. Your agency will provide the codes needed to access your discounts. To import hotel property discounts, click the Import Hotel Discounts tab. To enable a direct connect provider, click the Direct Connects tab. [?](#)

**Discounts** **Hotel Import/Export** **Direct Connect** **Visa / Passport Services** **Travelfusion Web Fare Suppliers**

[Add Air Discount](#)

Air Vendors

Vendor	Discount Type	Discount Code	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.						

[Add Hotel Chain Discount](#)

Hotel Vendors

Vendor	Discount Code	CD Number	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.						

[Add property-specific hotel discount](#)

Hotel Properties

Records 1 - 0 of 0 Records [All](#)

Vendor	Hotel Reference Name	Discount Code	CD Number	Property ID	Contract Rate	Preference
No records found.						



If there is not a discount defined for IHG, the administrator clicks **Add Hotel Chain Discount**.

[Add Hotel Chain Discount](#)

Hotel Vendors

Vendor	Discount Code	CD Number	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.						

If there is already a discount configured for IHG, the administrator clicks the vendor name to edit it.

[Add Hotel Chain Discount](#)

Hotel Vendors

Vendor	Discount Code	CD Number	TripLink Discount Code	Valid From	Valid Until	Preference
<a href="#">Intercontinental Hotels Group</a>	12345678					Company Most Preferred

The administrator enters their Corporate ID (IHG's name for the discount code) in the **TripLink Discount Code** field, and clicks **Save**.

**Add Discount**

**Hotel Discount for Travel Config: Brooks Development (US)**

Save Cancel

To add a hotel chain discount, complete the fields below. Your fulfillment travel agency will provide the discount code. You may also highlight a vendor even if you do not have a discount by not adding a discount code or CD number. Text added to the Notes section will display to users beside each property under this chain. Be sure to click Save before moving on to the next step.

Vendor  
 Intercontinental Hotels Group Super chains have this background color.  
 Major vendors have this background color.

**Triplink Discount Code**  
 0987654321

Preference Discount Code CD Number  
 Most Preferred

Valid From Valid Until

Discounted Fees  
 Breakfast Free  
 Parking Free

## Lodge Account Transactions Now Match Segments Imported With TripLink

### Overview

When Concur is importing credit card transactions for lodge accounts, the ticket number is used to match the transaction with the booked travel segment in Concur. Prior to this release, this matching did not include travel segments imported using TripLink. In the May 2014 release, the matching is updated to include travel segments imported using TripLink, using the Ticket Number as the matching detail.

### BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides better reconciliation of lodge account card transactions for clients with TripLink.

## **Configuration/Feature Activation**

No additional configuration is required for this feature.

## **Agency Assistance: TripLink Branding Removed from Windows in Application**

### **Overview**

For clients with Agency Assistance enabled, users can choose to contact their agency to modify a travel segment booking. Prior to this release, the window that appeared to the user had the following title: Sending Open Booking Details to Agency. In the May 2014 release, the window title is updated to: Sending Reservation Details to Agency.

### **BUSINESS PURPOSE/CLIENT BENEFIT**

This update prevents confusion and provides a consistent experience regardless of travel segment booking source.

## **Configuration/Feature Activation**

The feature is automatically on; there are no additional configuration steps.

## **TripLink Suppliers: Supplier Can Update User's Loyalty Number without Resetting Connection**

### **Overview**

TripLink Suppliers can update the Travel Profile information for the Concur users that have granted them access by connecting their Concur account to their account with the supplier. Prior to this release, when the supplier updated the user's Loyalty Program number, the system would revoke the supplier's access to the user's information. In the May 2014 release, the supplier can update the user's Loyalty Program number without resetting the connection between supplier and user.

### **BUSINESS PURPOSE/CLIENT BENEFIT**

This update allows the supplier to perform necessary maintenance without interrupting the connection between Concur and the supplier.

## **Configuration/Feature Activation**

The feature is automatically on; there are no additional configuration steps.

# **Expense-Only Clients: Car E-Receipt Vendors Now Provide E-Receipts to Users**

## **Overview**

Users at Expense-only clients who have opted-in to e-receipts are included in a batch file sent to car vendors that provide e-receipts. Prior to this release, the vendors did not have a good method of connecting the users at Expense-only clients to their e-receipt system. In the May 2014 release, Concur is providing the TripLink Discount Code in the batch file, which allows the e-receipt vendors to successfully link the users to the e-receipts.

### **BUSINESS PURPOSE/CLIENT BENEFIT**

This enhancement supports e-receipts for Expense-only clients.

## **Configuration/Feature Activation**

The feature is automatically on; there are no additional configuration steps.

# Supported Configurations

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Monthly browser certifications, both current and planned, are available on the **Release Notes** page.

## Microsoft Internet Explorer Version 7.x Retirement December 2014

### Overview

Support for the Microsoft Internet Explorer (IE) version 7.0 browser under Concur products will end December 31, 2014. Clients using IE v. 7.0 are *strongly* advised to update to the latest IE browser version (v. 11.0) no later than August 1, 2014. This will ensure that clients can comfortably transition by the December 31 deadline.

### Background

Microsoft ended support for this version of their IE browser in accordance with their product lifecycle program. Concur has continued support to ensure clients could transition to a newer browser in a timely manner.



Refer to *Browser Support* in the *Concur: Supported Configurations* document for more information about supported browsers under Concur products.

## Internet Explorer V. 11: Best Practice for Use with Concur Products

### Overview

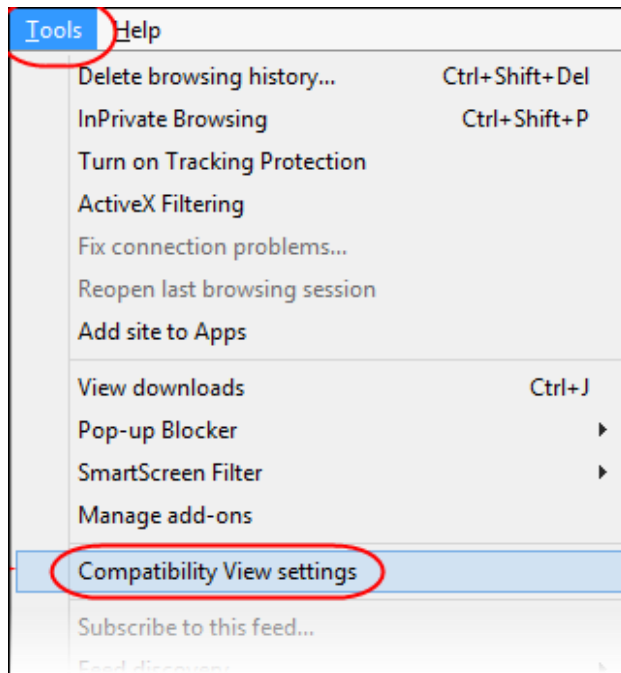
With the release of Microsoft Internet Explorer (IE) version 11.0 some issues have been identified that may cause problems when viewing and working with Concur products such as Expense, Invoice, and others.

To resolve these issues, it is strongly recommended that the client implement Compatibility Mode in IE v.11 by adding the Concur URL to the browser's compatibility list, available on the **Tools** menu of the browser.

► **To add Concur to your IE v. 11 compatibility list:**

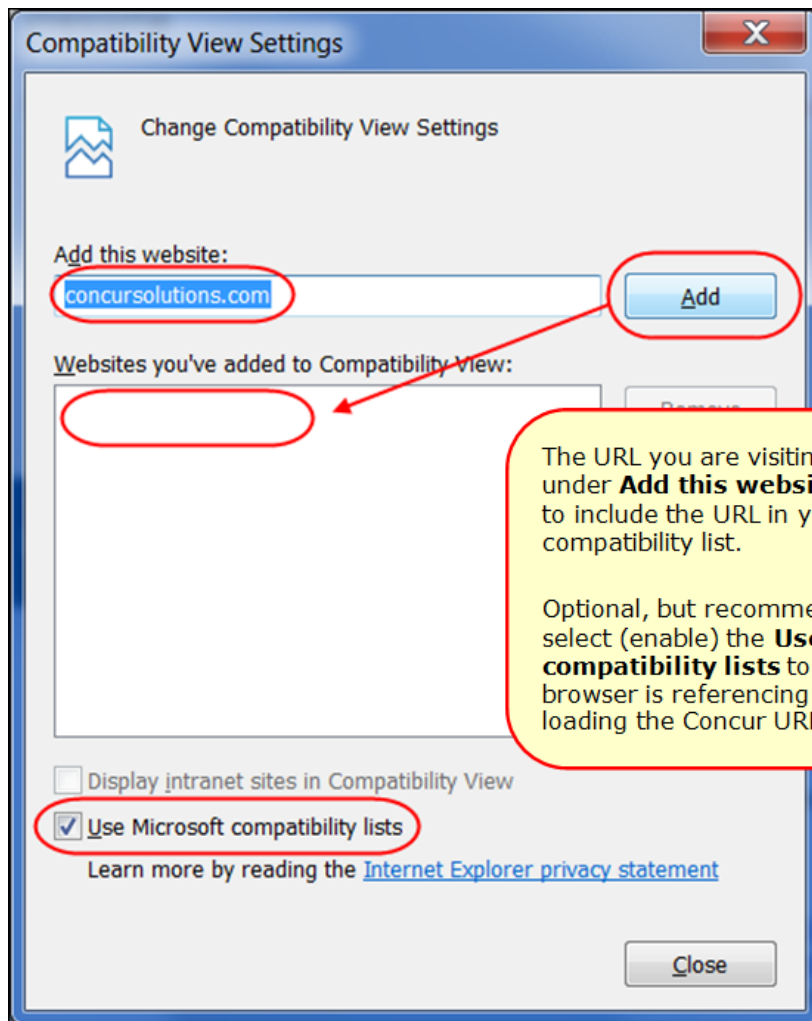
1. In IE v.11, load the Concur page (for example, [www.concursolutions.com](http://www.concursolutions.com)).

2. Click **Tools > Compatibility View settings** to open the **Compatibility View Settings** dialog box.



*Optional:* Press Alt to display the **Tools** menu.

3. Click **Add** to include the Concur URL in the **Websites you've added to Compatibility View** list.



**TIP:** Select (enable) the **Use Microsoft compatibility lists** option to ensure this list is used when accessing Concur products.

4. Click **Close**.

## Monthly Browser Certifications

Monthly browser certifications, both current and planned, are available with the other Concur monthly release notes.

Refer to *Additional Release Notes and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

# Additional Release Notes and Technical Documentation

## App Center: New Dedicated Release Notes

### Overview

Concur is now providing dedicated release notes for the App Center. These release notes detail the applications that will be released in the upcoming month on the App Center. There is a new row for the App Center on the Release Notes landing page, available to clients from the Concur Support Portal.

### Professional:

Client Support Portal		<b>Notes:</b>			
Release Notes - Concur Professional/Premium		<ul style="list-style-type: none"><li>If you cannot access the current release notes, please clear your browser cache and try again.</li><li>These documents are provided in English only.</li><li>When are the release notes posted?</li></ul>			
If the client has this Concur solution... ▶▶▶▶ ...then the client should review these Release Notes ▼▼▼▼		Expense	Travel	Invoice	Request
Expense (includes Imaging, Expense Pay, Expense Report Auditing, Jobs; cases/issues list in a separate doc)		X			
Travel (with cases/issues list)			X		
Invoice Management (with cases/issues list)				X	
Request - or Authorization Request; formerly Travel Request					X
<b>Additional services:</b> The X indicates that these services - and release notes - are available for use with the Concur solutions shown above.					
App Center		X	X	X	X
Mobile app (with cases/issues list) <b>NOTE:</b> Mobile is <i>not</i> released on the standard release schedule. The release notes are published throughout the month as each platform is updated.		X	X	X	
TripLink		X	X		
Concur Insight (formerly Analysis / Intelligence)		X		X	X (Essentials only)
Concur Messaging (formerly Risk Management) <b>NOTE:</b> Concur Messaging is <i>not</i> released on the standard release schedule.					X
Locate & Alert		X	X		
Web Services Platform		X	X	X	X
Monthly Browser Certification		X	X	X	X



## Standard:

Client Support portal	
Release Notes - Concur Standard	
Concur Solution	Additional Release Notes: Read the release notes below if you use these services.
<a href="#">Expense</a> (includes Expense Pay)	<a href="#">App Center</a>
<a href="#">Travel</a>	<a href="#">Mobile app</a>
<a href="#">Invoice</a>	<a href="#">TripLink</a>
	<a href="#">Concur Insight Essentials</a> (formerly Analysis)
	<a href="#">Locate &amp; Alert</a>
	<a href="#">Web Services Platform</a>
	<a href="#">Monthly Browser Certification</a>
<b>Notes:</b> <ul style="list-style-type: none"><li>• <i>If you cannot access the current release notes, please clear your browser cache and try again.</i></li><li>• <i>These documents are provided in English only.</i></li></ul>	

### BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides advance notification to administrators before App Center applications are released.

### Configuration/ Feature Activation

No additional configuration is required.

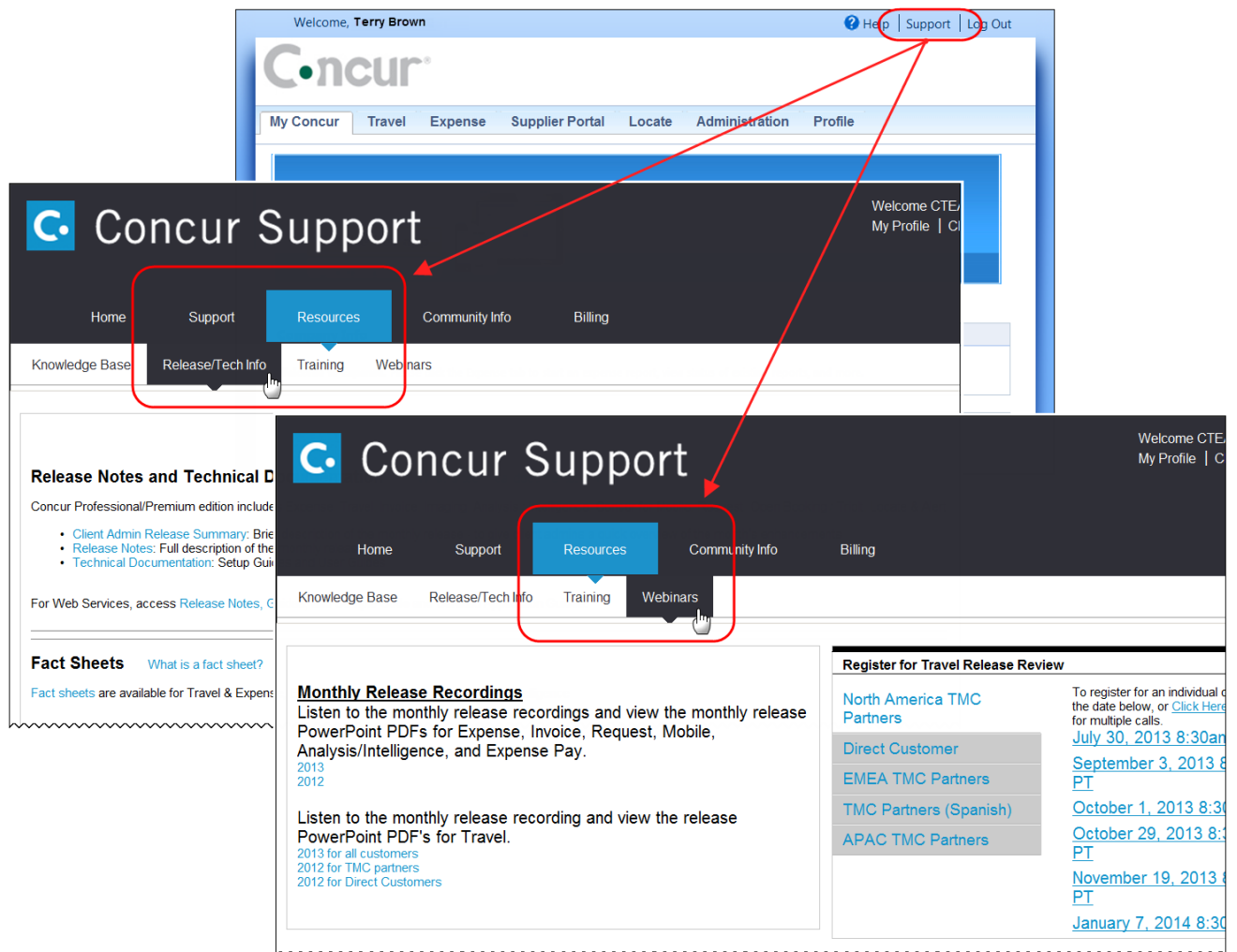
## Professional Edition

### Concur Support Portal

Access release notes, webinars, and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur. Click **Support** and then – in the Concur Support portal – click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



**NOTE:** If you use a user interface layout *other than* Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

Welcome, Chris Collins [ You are administering for: Yourself ]

Help | Log Out

Training  
Travel Help  
Travel Administration Help  
Locate & Alert Help  
Expense Help  
Invoice Help  
Expense Tools Help  
Expense Administration Help  
Invoice Administration Help  
Request Help  
Request Administration Help  
Budget Admin Help

My Concur Request Travel Expense Central Reconciliation Invoice Purchase Request Reporting Locate Administ

Manage your cash and card charges on the go.

Travel Info  
Book travel with Concur, check travel rules set by your company, get travel maps, and more

### Expense Administration - Feature Documentation

日本語

Client Admin Release Summary - **What's New**  
Client Release Notes - All Products  
Client Fact Sheets  
Concur Training Toolkit

Setup Guides (below)  
User Guides (below)  
Import / Extract Specifications (below)

These documents are provided in English only  
Permission to Duplicate / Permission to Copy / Proprietary Statement

#### Expense Setup Guides

Name	Revised	Format
Account Codes	Oct 19 2012	DOC - PDF
Allocations	Oct 19 2012	DOC - PDF
Attendees	June 14 2013	DOC - PDF
Audit Rules	Jul 1 2013	DOC - PDF
Audit Rules (Validation Rules)	Sep 23 2011	DOC - PDF
Authorization Requests (legacy Expense feature) - new clients, refer to Concur's Request service	Jun 22 2012	DOC - PDF

Report Date Requested Amount

06/28/2013	GBP 25.00
06/23/2013	\$2,401.34

## Standard Edition

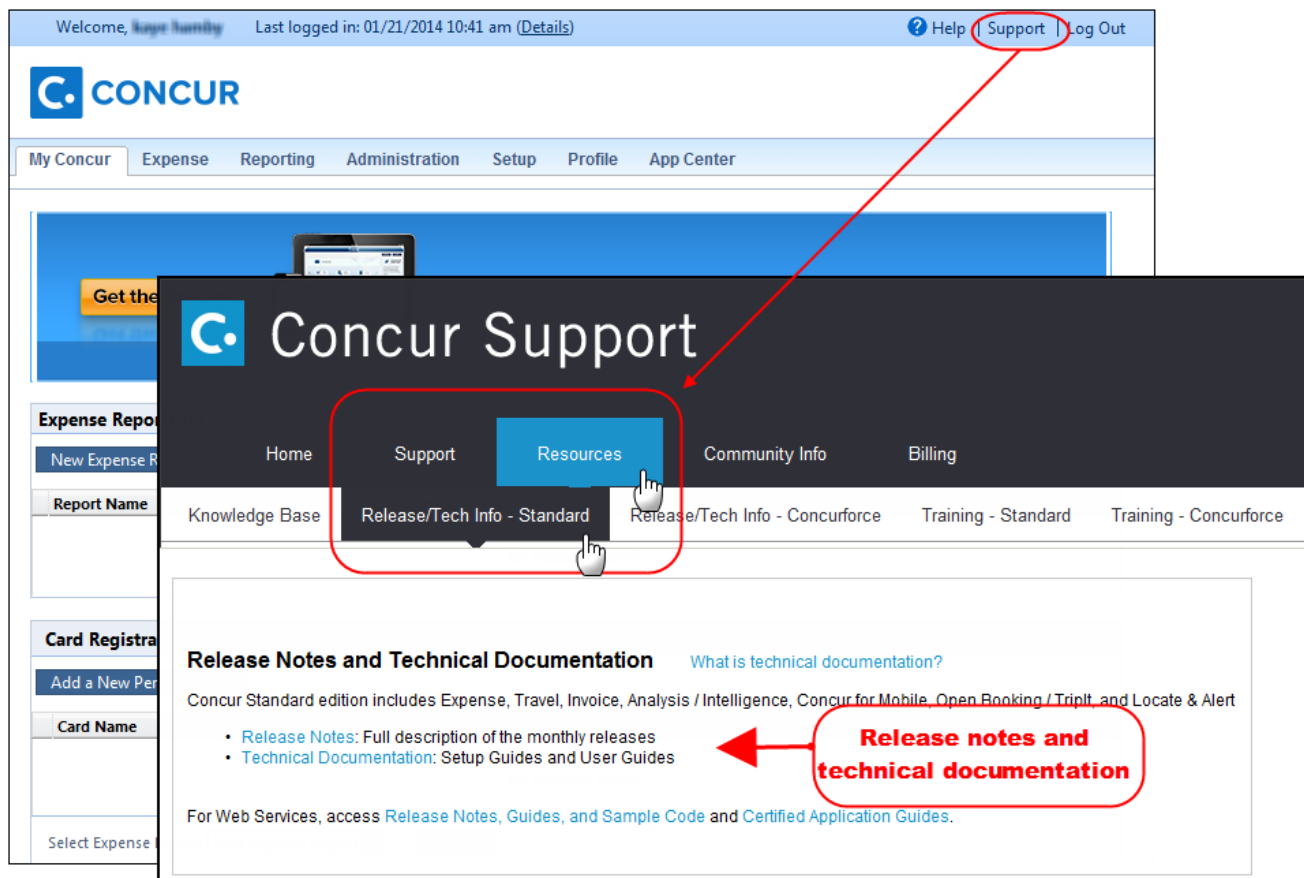
### Concur Support Portal

You can access release notes and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur.

Click **Support**, and then, in the Concur Support Portal, click **Resources**.

Click **Release/Tech Info - Standard** for release notes, technical documents etc.



## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

**Expense Setup and Administration**

Help Search

**Technical Documentation**

- Setup and User Guide**
- What's New - Expense
- What's New - Concur's mobile app
- What's New - Concurforce

**Intuit Toolbar**

- Using Online Help**
- Setup**
  - Approval Routing
  - Car Configuration
  - Company Card
  - Com...
- Cost**
- Qu**
- Ot**
- Expe**
- Intro**
- Empl**
- File**

**Use Online Help**

**Navigate Help**

Use the Help **Back** and **Forward** buttons to go back and forth between topics. These buttons are located in the top right corner of the Help system. Do **not** use the browser's **Back** and **Forward** buttons.

**Change the size of the left and right frames**

You can make the Contents (left) side of the page wider or narrower. To do so:

1. Place the mouse pointer on the gray bar that separates the left (Contents) and right (Help page) frames.
2. Click and drag to the desired width.

### Concur Standard Guides

Guide Name	Available Formats
<b>Expense Setup Guide</b> - Covers the Expense Setup wizard.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Administration User Guide</b> - Covers the Process Reports, Payment Manager, and Reporting features.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Expense Pay Guide</b> - Covers setup and administration of the Expense Pay product.	<a href="#">DOC</a> - <a href="#">PDF</a>

**NOTE:** These documents are provided in English only.

<p><b>Concur Release Notes</b></p> <p><b>TripLink</b></p>	
Month	Audience
<p>June 2014</p> <p>Initial post: Friday, June 13, 1:00 PM PT</p>	<p>Concur Clients FINAL</p>

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# Release Notes

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## **\*\*Coming Soon\*\* The Concur User Experience Evolution**

Organizations and their end users are holding their enterprise solutions to higher standards as the requirements of their business change – wanting their enterprise solutions to be intuitive, effortless, integrated, and efficient. Concur is committed to delivering the best Travel, Expense, Invoice, and related solutions for its 20,000+ clients worldwide, and is building a solid foundation that will be leveraged to meet these challenges.

The Concur User Experience Evolution is a key initiative that will accomplish three primary goals.

- Modernize the user experience and increase the usability of Concur applications, while maintaining the ability to apply and enforce company policies
- Implement features and functionality in a manner that provides clients with the maximum benefits for their Travel, Expense, and Invoicing needs, while minimizing change-management impacts
- Allow effortless navigation and access to features for all products on the web and mobile devices

Concur's goal is to continue to enhance the user experience to ensure products meet each client's evolving needs. This, along with technology and competitive influencers, are key inputs to internal strategies and used to inspire innovation. As Concur drives to provide the best solutions for clients, Concur will continue to improve the interface to meet that need. The evolving user experience will start in 2014 and will be ongoing as Concur continues to strive for excellence in partnership with clients.

Specific product lines impacted are:

- Travel (Standard, Professional)
- Expense (Standard, Professional, Small Business)
- Invoice Management (Standard, Professional)
- Request (Professional)
- TripLink

Key features and enhancements are:

- Enhanced Home and Expense pages with effortless navigation and a modern consumer-based application "Look-and-Feel"
- A streamlined travel summary and booking workflow process
- Consistent terminology and iconography – across all product lines including Travel, Expense, and Invoice

- A dashboard design with logical grouping of like functions and tasks to minimize the number of popups or pages required to complete a specified task
- A facts and stats section with key metrics and other helpful information for the user
- Actions, alerts, and notifications that are clearly defined and visible
- Vastly improved smart matching of expenses and receipts as a result of combining key functions on the same page
- Easy access to help, support, and other key resources

## **Schedule**

Implementation of the enhanced UI will start for select clients in August 2014. General release is scheduled to begin in October 2014 and will run through early 2015. General release clients will be allowed to preview the enhanced interface and related changes during this period. They can toggle between the current interface and the enhanced one, as required for their specific needs.

## **Resources**

Concur will launch a formal communication and client engagement plan that will run through implementation and include webinars, videos, formal messaging, and an online website dedicated to the evolution. Clients can also leverage standard support channels as well as social media to stay informed or provide feedback.



# Supported Configurations

---

Monthly browser certifications, both current and planned, are available on the **Release Notes** page.

## Microsoft Internet Explorer Version 7.x Retirement Schedule

### Overview

Support for the Microsoft Internet Explorer (IE) version 7.0 browser under Concur products will end December of 2014. Clients are strongly advised to plan the update to a newer version of the IE browser if they are currently implementing 7.x as their primary browser.

### Background

Microsoft ended support for this version of their IE browser in accordance with their product lifecycle program. Concur has continued support to ensure clients could transition to a newer browser in a timely manner.



Refer to *Browser Support* in the *Concur: Supported Configurations* document for more information about supported browsers under Concur products.

## Monthly Browser Certifications

Monthly browser certifications, both current and planned, are available with the other Concur monthly release notes.

Refer to *Additional Release Notes and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

# Additional Release Notes and Technical Documentation

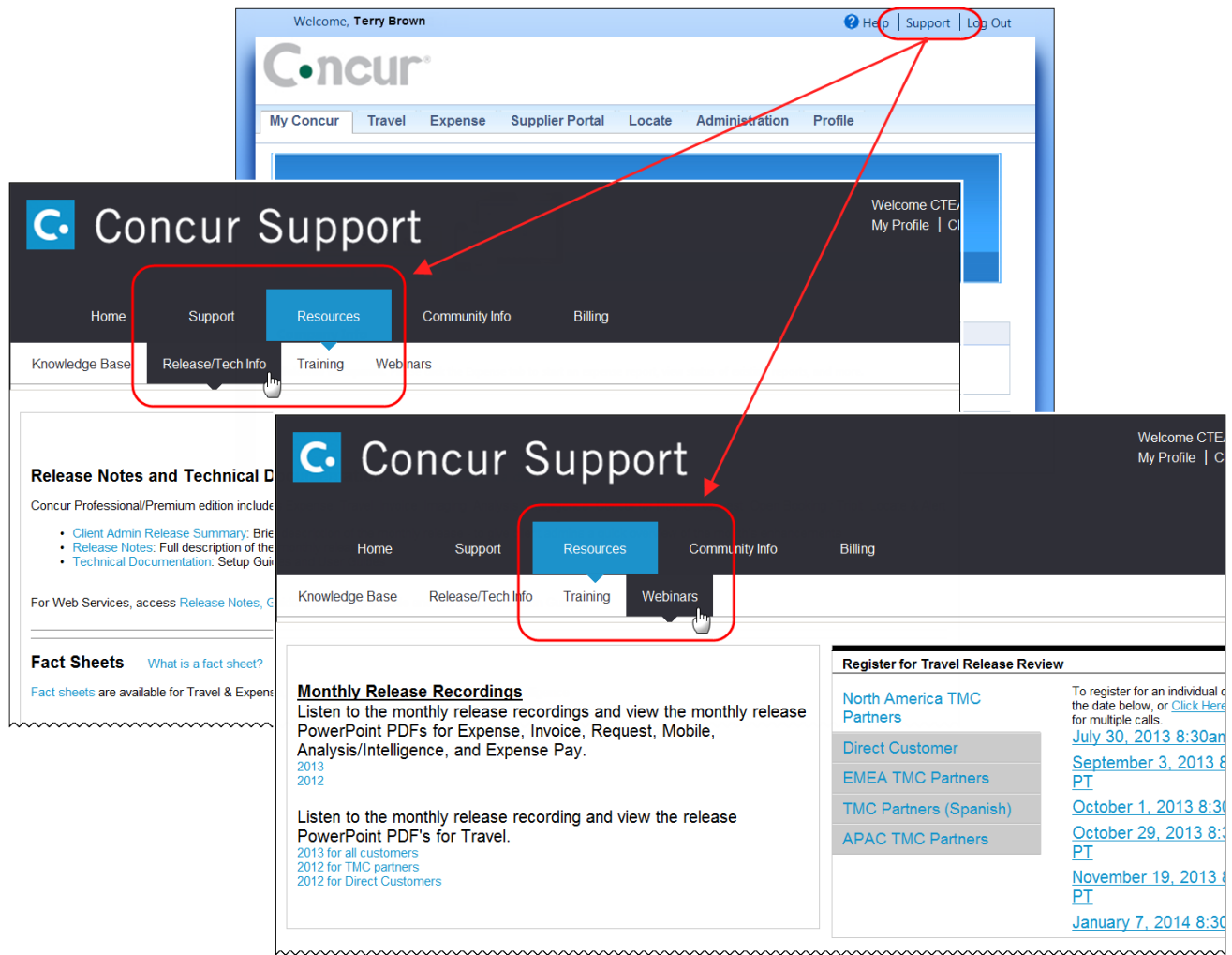
## Professional Edition

### Concur Support Portal

Access release notes, webinars, and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur. Click **Support** and then – in the Concur Support portal – click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



**NOTE:** If you use a user interface layout **other than** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

The screenshot shows the Concur Admin interface. At the top, a welcome message for Chris Collins is displayed. The main navigation bar includes links for My Concur, Request, Travel, Expense, Central Reconciliation, Invoice, Purchase Request, Reporting, Locate, and Admin. A blue banner on the left encourages managing cash and card charges. The right sidebar contains a Help menu with various options, including Expense Administration Help, which is highlighted with a red circle and a mouse cursor. Below the Help menu, a red arrow points to the 'Expense Administration - Feature Documentation' page. This page features a 'Quick Links' section with links to Client Admin Release Summary, Client Release Notes, Client Fact Sheets, and Concur Training Toolkit. It also includes 'Setup Guides' and 'User Guides' for various features. A table titled 'Expense Setup Guides' lists various setup items with their revision dates and formats. A red note indicates that documents are provided in English only.

**Expense Administration - Feature Documentation**

**Quick Links**

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit

**Setup Guides (below)**

- User Guides (below)
- Import / Extract Specifications (below)

**Expense Setup Guides**

Name	Revised	Format
Account Codes	Oct 19 2012	DOC - PDF
Allocations	Oct 19 2012	DOC - PDF
Attendees	June 14 2013	DOC - PDF
Audit Rules	Jul 1 2013	DOC - PDF
Audit Rules (Validation Rules)	Sep 23 2011	DOC - PDF
Authorization Requests (legacy Expense feature) - new clients, refer to Concur's Request service	Jun 22 2012	DOC - PDF

**These documents are provided in English only**

Permission to Duplicate / Permission to Copy / Proprietary Statement

## Standard Edition

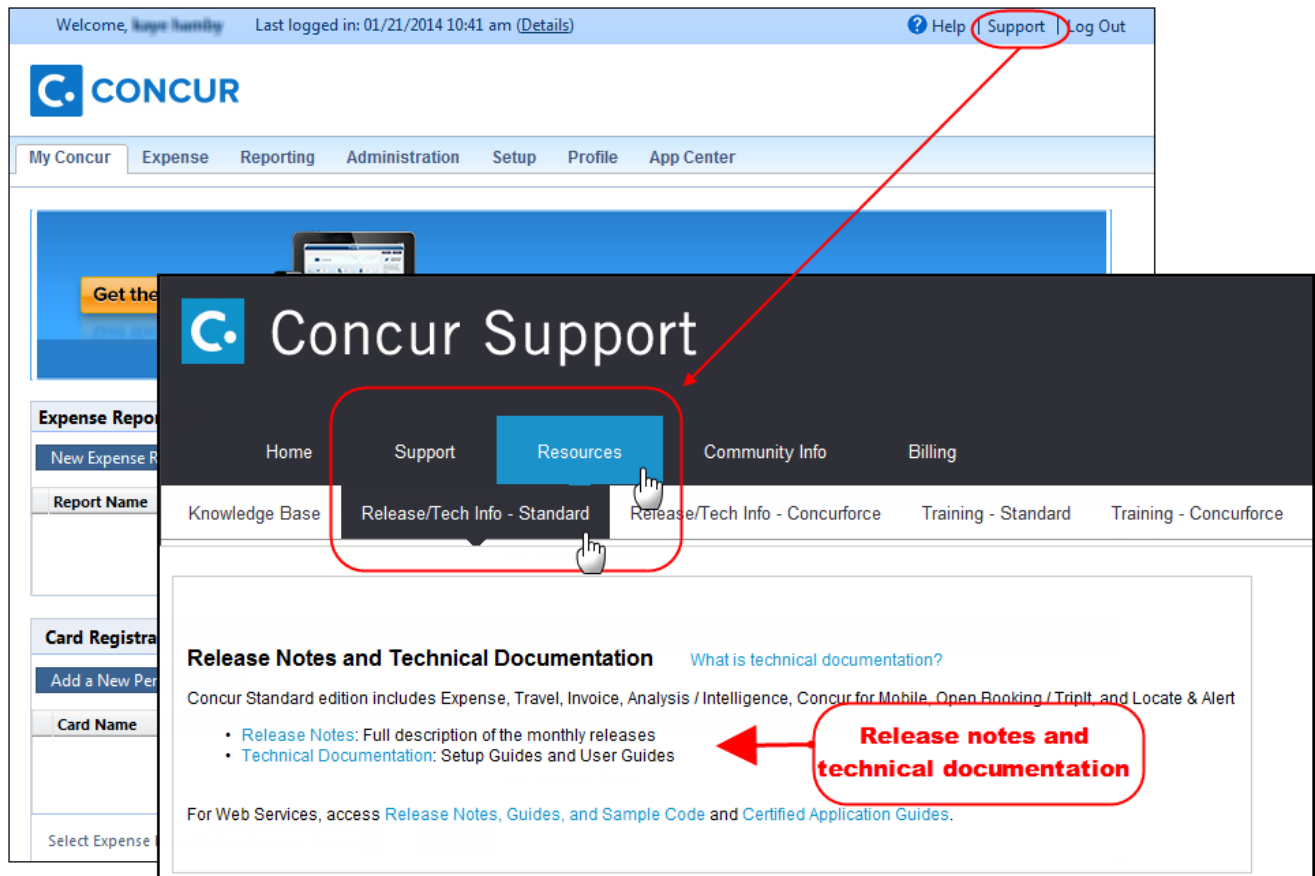
### Concur Support Portal

You can access release notes and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur.

Click **Support**, and then, in the Concur Support Portal, click **Resources**.

Click **Release/Tech Info - Standard** for release notes, technical documents etc.



## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

**Expense Setup and Administration**

Help Search

**Technical Documentation**

- Setup and User Guide**
- What's New - Expense
- What's New - Concur's mobile app
- What's New - Concurforce

**Intuit Toolbar**

- Using Online Help**
- Setup**
  - Approval Routing
  - Car Configuration
  - Company Card
  - Com...
- Cost**
- Qu**
- Ot**
- Expe**
- Intro**
- Empl**
- File**

**Use Online Help**

**Navigate Help**

Use the Help **Back** and **Forward** buttons to go back and forth between topics. These buttons are located in the top right corner of the Help system. Do **not** use the browser's **Back** and **Forward** buttons.

**Change the size of the left and right frames**

You can make the Contents (left) side of the page wider or narrower. To do so:

1. Place the mouse pointer on the gray bar that separates the left (Contents) and right (Help page) frames.
2. Click and drag to the desired width.

**Concur Standard Guides**

Guide Name	Available Formats
<b>Expense Setup Guide</b> - Covers the Expense Setup wizard.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Administration User Guide</b> - Covers the Process Reports, Payment Manager, and Reporting features.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Expense Pay Guide</b> - Covers setup and administration of the Expense Pay product.	<a href="#">DOC</a> - <a href="#">PDF</a>

**NOTE:** These documents are provided in English only.

Concur Release Notes	
TripLink	
Month	Audience
July 2014 Update #1: Tuesday, July 22, 12:30 PM PT	Concur Clients

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# Release Notes

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## **\*\*Coming Soon\*\* The Concur User Experience Evolution**

### ***Overview***

Organizations and their end users are holding their enterprise solutions to higher standards as the requirements of their business change – wanting their enterprise solutions to be intuitive, effortless, integrated, and efficient. Concur is committed to delivering the best Travel, Expense, Invoice, and related solutions for its 20,000+ clients worldwide, and is building a solid foundation that will be leveraged to meet these challenges.

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- Modernize the user experience and increase the usability of Concur applications, while maintaining the ability to apply and enforce company policies
- Implement features and functionality in a manner that provides clients with the maximum benefits for their Travel, Expense, and Invoicing needs, while minimizing change-management impacts
- Allow effortless navigation and access to features for all products on the web and mobile devices

Concur's goal is to continue to enhance the user experience to ensure products meet each client's evolving needs. This, along with technology and competitive influencers, are key inputs to internal strategies and used to inspire innovation. As Concur drives to provide the best solutions for clients, Concur will continue to improve the interface to meet that need. The evolving user experience will start in 2014 and will be ongoing as Concur continues to strive for excellence in partnership with clients.

Specific product lines impacted are:

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- Actions, alerts, and notifications that are clearly defined and visible
- Vastly improved smart matching of expenses and receipts as a result of combining key functions on the same page
- Easy access to help, support, and other key resources

## **Schedule and Activation – Standard Edition**

General release is scheduled to begin in October 2014 and will run through early 2015. During this time, any user with access to the **Setup** tab can turn on the enhanced UI for just themselves or for the entire company.

## **Schedule and Activation – Professional Edition**

Implementation of the enhanced UI will start for approved early-adopter clients in August 2014. General release is scheduled to begin in October 2014 and will run through early 2015. During this time, general-release clients will be allowed to preview the enhanced interface and related changes.

There will be several options available for users to become familiar with the enhanced UI and introduce it in the company:

- By admin
- By selected users
- By groups/travel classes
- For the entire company

All of these options are described below as well as the role/permission that an admin must have in order to make the enhanced UI available to users

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**NOTE:** As the availability period approaches, you will receive more information (and screen samples) about how these tasks are completed.

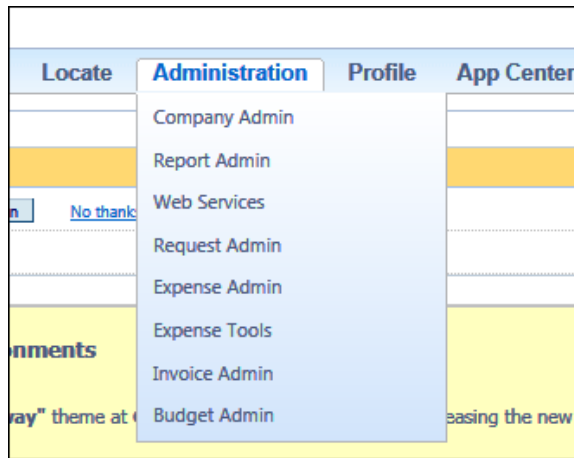
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### ***By Admin***

The admin can individually toggle between the current interface and the enhanced UI for his/her own work session. Only that admin sees the enhanced UI; no other users are impacted. This way, the admin can learn about the changes before enabling it for other users.

*Who can do this?*

If an admin's roles/permissions provide access to the **Administration** menu, then the admin will be able to toggle the enhanced UI for himself/herself.

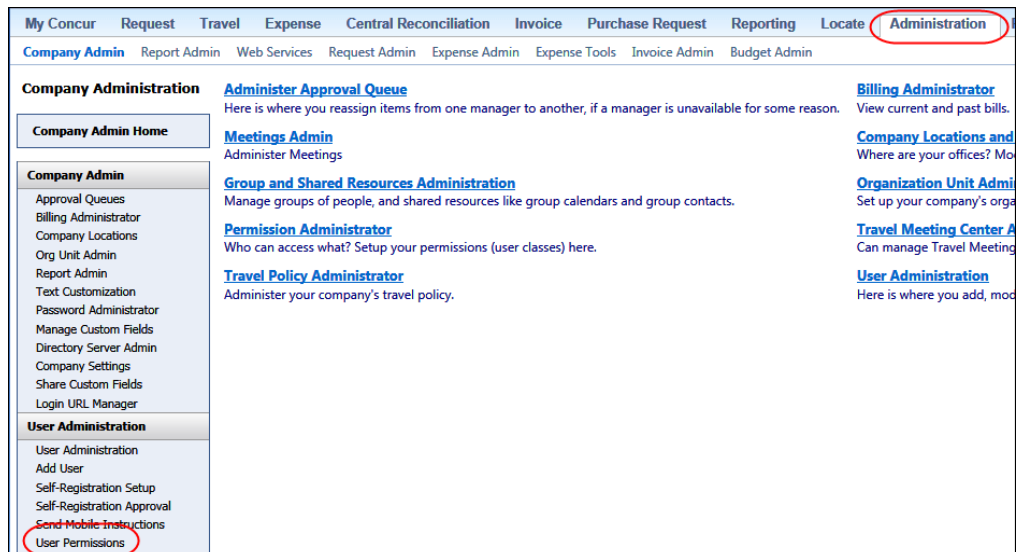


### **By Selected Users**

The admin can turn on the enhanced UI for selected individual users, for example, a selected set of admin assistants or power users. These users will likely act as a resource to help others during the transition.

*Who can do this?*

If an admin's roles/permissions provide access to the **User Permissions** option on the left menu, then the admin will be able to enable the enhanced UI for individual users.



## ***By Groups/Travel Classes***

The admin can turn on the enhanced UI for selected groups of users. This allows deployment of the enhanced UI to any new implementations of divisions or groups immediately and it also allows the company to gradually rollout the new UI.

*Who can do this?*

- ♦ For Expense, Invoice, and Request – the admin can provide access by Employee Group. The admin must have one of these:
  - Expense Configuration Administrators assigned to the global level
  - Invoice Configuration Administrators assigned to the global level
  - Request Configuration Administrators assigned to the global level
- ♦ For Travel – the admin can provide access by group. The admin must be able to access the **User Permissions** option on the left menu and can assign the proper permission to a group or travel class.

## ***Entire Company***

The admin can turn on the enhanced UI of all users.

*Who can do this?*

- ♦ For Expense, Invoice, and Request – the admin can provide access by Employee Group. The admin must have one of these:
  - Expense Configuration Administrators assigned to the global level
  - Invoice Configuration Administrators assigned to the global level
  - Request Configuration Administrators assigned to the global level
- ♦ For Travel – the admin can provide access by travel configuration. The admin must have the Travel System Admin permissions.

## ***IMPORTANT!!***

If the company has multiple admins and multiple Concur products, be aware that coordination is required among the admin team to achieve the desired results. Be aware that a user will have access if an admin provides him/her access in **any** of the ways described above.

For example, assume that a company uses Concur Travel and Expense. Further assume that the Expense admin wants to provide access to only a select set of individuals while the Travel admin wants to assign access to an entire travel class. The result is that **everyone** in that travel class who is also an Expense user will have access to the **entire** Travel and Expense UI.

## **Resources**

Concur will launch a formal communication and client engagement plan that will run through implementation and include webinars, videos, formal messaging, and an

online website dedicated to the evolution. Clients can also leverage standard support channels as well as social media to stay informed or provide feedback.

## User Interface: Change in Red Text

### Overview

To increase text contrast, we have modified all red text in Concur to be a slightly darker red (#df0000).

This is a sample of standard red (#ff0000).

This is a sample of the darker red (#df0000).

### Configuration / Feature Activation

The feature is automatically on; there are no additional configuration or activation steps.

## TripLink Travel Rules Available for Expense-Only Clients

### Overview

Clients with Expense (Standard or Professional) and TripLink, but not Travel, can now manage the travel rules related to TripLink itineraries. The rules are available to users with the TripLink Policy Admin or Company Admin user roles (Professional Expense), or the Can Administer user role (Standard Expense).

#### ***Professional***

The new travel rules appear on the **Administration > Company Admin > TripLink Rules Configuration** page.

My Concur   Travel   Expense   Reporting   **Administration**   Profile   App Center

Company Admin   Report Admin   Web Services

---

**Company Administration**

**Company Admin Home**

**Company Admin**

- Approval Queues
- Billing Administrator
- Company Locations
- Org Unit Admin
- Report Admin

**Administer Approval Queue**  
Here is where you reassign items from one manager to another for some reason.

**Company Locations and Maps**  
Where are your offices? Modify your business locations.

**Organization Unit Administration**  
Set up your company's organizational units/departments.

**TripLink Rules Configuration**  
Administer your company's travel rules for TripLink

My Concur   Travel   Expense   Reporting   **Administration**   Profile   App Center

Company Admin   Report Admin   Web Services   Expense Admin   Expense Tools

---

**Travel Rules**  
Define your travel policies, determine the benchmark lowest fare and assign trip approvers.

[1\) Travel Rules](#)

**Travel Rules**   Manager Notification

Please select the travel policy you want to update. Be sure to click Save to save your changes:  
Default Travel Class

---

**Travel Rules**

To enable a rule, choose Log for Reports or Notify Manager from the list. Once you have enabled a rule, you can change the values associated with it. Be sure to click Save to save your changes.

Concur TripLink	
Disabled	All Trips
Disabled	Car vendor is not preferred
Disabled	Car rate is greater than or equal to \$50.00 per day
Disabled	Hotel chain is not preferred
Disabled	Hotel property is not preferred
Disabled	Hotel rate is greater than or equal to \$200.00
Log for reports	Hotel rate is greater than or equal to the price-to-beat
Log for reports	Air fare is greater than or equal to the calculated price-to-beat
Disabled	Air carrier is not preferred

Save

## Standard

The new travel rules appear on the **Setup > Travel > Travel Rules** page.

**Travel Rules**  
This step allows you to define your travel policies, determine the benchmark lowest fare and assign trip approvers.

1) Travel Policy  
2) **Travel Rules**  
3) Travel Discounts

**Travel Rules** | Manager Notification

Please select the travel policy you want to update. Be sure to save your changes before moving on to the next step:  
Default Travel Class:

**Travel Rules**

To enable a rule, choose Log for Reports or Notify Manager from the list. Once you have enabled a rule, you can change the values associated with it. Be sure to save your changes before moving on to the next step.

**Concur TripLink**

Disabled <input type="text"/>	All Trips
Disabled <input type="text"/>	Car vendor is not preferred
Disabled <input type="text"/>	Car rate: greater than or equal to <input type="text"/> \$50.00 per day
Disabled <input type="text"/>	Hotel chain is not preferred
Disabled <input type="text"/>	Hotel property is not preferred
Disabled <input type="text"/>	Hotel rate is: greater than or equal to <input type="text"/> \$200.00
Disabled <input type="text"/>	Air carrier is not preferred

## BUSINESS PURPOSE/CLIENT BENEFIT

This update provides more options for monitoring TripLink itineraries.

## Configuration/Feature Activation

The feature is automatically on; there are no additional configuration or activation steps.

# TripLink and TripIt Reports Available to Standard Expense-Only Clients

## Overview

Concur has updated Standard Expense-only + TripLink clients to provide access to TripLink and TripIt reports, on the **Reporting > Travel Reports** page. The access is based on a new user role, called **Report user**. Users with this role will see the **Reporting > Travel Reports** page, and can view reports based on TripLink and TripIt activity.

The screenshot shows the Concur Reporting interface. At the top, there is a navigation bar with tabs: My Concur, Travel, Expense, Reporting (selected), Administration, Setup, Profile, and App Center. Below the navigation bar, the 'Travel Reports' section is active. On the left, a sidebar lists various reports under the 'Concur TripLink' category. The main content area displays the 'Concur TripLink By Air Supplier' report configuration. It includes a description: 'This report includes a list of itineraries by supplier.' Below this, there are two main sections: 'Supplier' and 'Date Range'. The 'Supplier' section has a dropdown menu currently set to '(All Suppliers)'. The 'Date Range' section has three dropdown menus: 'By Month' (set to 'April'), '2014' (set to '2014'), and 'HTML (display to Screen)' (set to 'HTML (display to Screen)'). A 'Submit' button is located to the right of the 'Date Range' section. A link 'Show this Report by default' is also present next to the report title.

My Concur   Travel   Expense   **Reporting**   Administration   Setup   Profile   App Center

**Travel Reports**

Reports

**Concur TripLink**

**Concur TripLink By Air Supplier** [Show this Report by default](#)

This report includes a list of itineraries by supplier.

Supplier  
(All Suppliers) ▼

Date Range  
By Month ▼ April ▼ 2014 ▼ HTML (display to Screen) ▼

Concur TripLink

- Concur TripLink By Air Supplier**
- Concur TripLink By Car Supplier
- Concur TripLink By Hotel Supplier
- Concur TripLink By Rail Supplier
- Concur TripLink Supplier Summary by User
- Concur TripLink Travel Policy Exceptions
- Concur TripLink Users with Validated Email

### BUSINESS PURPOSE/CLIENT BENEFIT

This update provides access to reports that allow clients to monitor TripLink and TripIt activity.

### Configuration/Feature Activation

Concur enables this feature for clients with Standard Expense-only and TripLink. After the feature is enabled, the administrator assigns the **Report user** role on the **User Details** page of Setup.

The screenshot shows the 'Travel' configuration section. It has a title 'Travel' and three items with checkboxes and a help icon (a blue question mark): 'Concur TripLink User' (checked), 'TripLink Travel Policy Admin' (unchecked), and 'Report user' (checked).

**Travel**

- ☒ Concur TripLink User
- ☐ TripLink Travel Policy Admin
- ☒ Report user

# Supported Configurations

---

Monthly browser certifications, both current and planned, are available on the **Release Notes** page.

## Microsoft Internet Explorer Version 7.x Retirement Schedule

### Overview

Support for the Microsoft Internet Explorer (IE) version 7.0 browser under Concur products will end December of 2014. Clients are strongly advised to plan the update to a newer version of the IE browser if they are currently implementing 7.x as their primary browser.

### Background

Microsoft ended support for this version of their IE browser in accordance with their product lifecycle program. Concur has continued support to ensure clients could transition to a newer browser in a timely manner.



Refer to *Browser Support* in the *Concur: Supported Configurations* document for more information about supported browsers under Concur products.

## Monthly Browser Certifications

Monthly browser certifications, both current and planned, are available with the other Concur monthly release notes.

Refer to *Additional Release Notes and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.



# Additional Release Notes and Technical Documentation

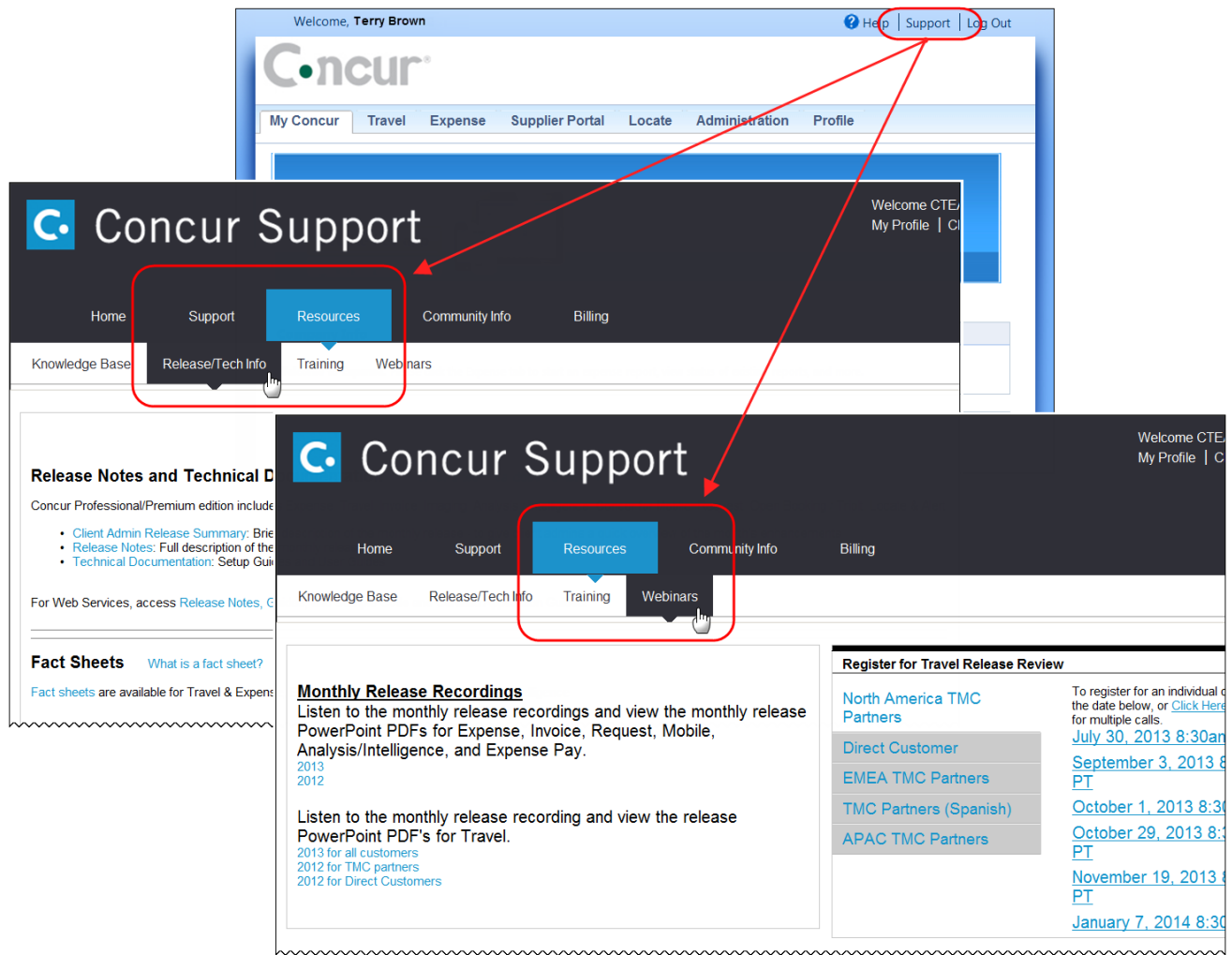
## Professional Edition

### Concur Support Portal

Access release notes, webinars, and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur. Click **Support** and then – in the Concur Support portal – click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



**NOTE:** If you use a user interface layout **other than** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

The screenshot shows the Concur Admin interface. At the top, a welcome message for Chris Collins is displayed. Below the navigation bar, the 'Help' menu is open, showing various help topics. A red circle highlights the 'Expense Administration Help' link, which is being clicked by a mouse cursor. Below the menu, the 'Expense Administration - Feature Documentation' page is shown. It includes a 'Quick Links' section with links to release summaries, notes, and fact sheets. A 'Setup Guides' section lists various guides with their revision dates and formats. A table of 'Expense Setup Guides' is also present, listing guides like 'Account Codes', 'Allocations', 'Attendees', 'Audit Rules', and 'Authorization Requests' with their respective revision dates and formats.

Welcome, Chris Collins [ You are administering for: Yourself ]

Help | Log Out

Training  
Travel Help  
Travel Administration Help  
Locate & Alert Help  
Expense Help  
Invoice Help  
Expense Tools Help  
Expense Administration Help  
Invoice Administration Help  
Request Help  
Request Administration Help  
Budget Admin Help

**Expense Administration - Feature Documentation**

Quick Links

Client Admin Release Summary - **What's New**  
Client Release Notes - All Products  
Client Fact Sheets  
Concur Training Toolkit

Setup Guides (below)  
User Guides (below)  
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Expense Setup Guides

Name	Revised	Format
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Audit Rules (Validation Rules)	Sep 23 2011	DOC - PDF
Authorization Requests (legacy Expense feature) - new clients, refer to Concur's Request service	Jun 22 2012	DOC - PDF

## Standard Edition

### Concur Support Portal

You can access release notes and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur.

Click **Support**, and then, in the Concur Support Portal, click **Resources**.

Click **Release/Tech Info - Standard** for release notes, technical documents etc.

The screenshot displays the Concur Support interface. At the top, a navigation bar includes 'Help' and 'Support' (circled in red). Below this, a secondary navigation bar features 'Resources' (highlighted in blue) and 'Release/Tech Info - Standard' (indicated by a red box and a mouse cursor). A red arrow points from the 'Support' link in the top bar to the 'Resources' link. The main content area is titled 'Release Notes and Technical Documentation' and includes a list of links: 'Release Notes' and 'Technical Documentation'. A red box highlights the text 'Release notes and technical documentation' with a red arrow pointing to the list of links. The page also features a sidebar with links like 'Expense Reports', 'Card Registration', and 'Select Expense'.

Welcome, [Kaye Humby](#) Last logged in: 01/21/2014 10:41 am ([Details](#)) [Help](#) [Support](#) [Log Out](#)

**C. CONCUR**

My Concur Expense Reporting Administration Setup Profile App Center

Get the

**C. Concur Support**

Home Support **Resources** Community Info Billing

Knowledge Base **Release/Tech Info - Standard** Release/Tech Info - Concurforce Training - Standard Training - Concurforce

**Release Notes and Technical Documentation** [What is technical documentation?](#)

Concur Standard edition includes Expense, Travel, Invoice, Analysis / Intelligence, Concur for Mobile, Open Booking / TripIt, and Locate & Alert

- [Release Notes](#): Full description of the monthly releases
- [Technical Documentation](#): Setup Guides and User Guides

For Web Services, access [Release Notes](#), [Guides](#), and [Sample Code](#) and [Certified Application Guides](#).

**Release notes and technical documentation**

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Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

**Expense Setup and Administration**

Help Search

**Technical Documentation**

- Setup and User Guide**
- What's New - Expense
- What's New - Concur's mobile app
- What's New - Concurforce

**Intuit Toolbar**

- Using Online Help**
- Setup**
  - Approval Routing
  - Car Configuration
  - Company Card
  - Com...
- Cost**
- Qu**
- Ot**
- Expe**
- Intro**
- Empl**
- File**

**Use Online Help**

**Navigate Help**

Use the Help **Back** and **Forward** buttons to go back and forth between topics. These buttons are located in the top right corner of the Help system. Do **not** use the browser's **Back** and **Forward** buttons.

**Change the size of the left and right frames**

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2. Click and drag to the desired width.

### Concur Standard Guides

Guide Name	Available Formats
<b>Expense Setup Guide</b> - Covers the Expense Setup wizard.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Administration User Guide</b> - Covers the Process Reports, Payment Manager, and Reporting features.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Expense Pay Guide</b> - Covers setup and administration of the Expense Pay product.	<a href="#">DOC</a> - <a href="#">PDF</a>

**NOTE:** These documents are provided in English only.

Concur Release Notes	
TripLink	
Month	Audience
August 2014 Initial Post: Friday, August 22, 2:30 PM PT	Concur Clients FINAL

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# Release Notes

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## **\*\*Coming Soon\*\* The Concur User Experience Evolution**

### **Overview**

Organizations and their end users are holding their enterprise solutions to higher standards as the requirements of their business change – wanting their enterprise solutions to be intuitive, effortless, integrated, and efficient. Concur is committed to delivering the best Travel, Expense, Invoice, and related solutions for its 20,000+ clients worldwide, and is building a solid foundation that will be leveraged to meet these challenges.

The Concur User Experience Evolution is a key initiative that will accomplish three primary goals.

- Modernize the user experience and increase the usability of Concur applications, while maintaining the ability to apply and enforce company policies
- Implement features and functionality in a manner that provides clients with the maximum benefits for their Travel, Expense, and Invoicing needs, while minimizing change-management impacts
- Allow effortless navigation and access to features for all products on the web and mobile devices

Concur's goal is to continue to enhance the user experience to ensure products meet each client's evolving needs. This, along with technology and competitive influencers, are key inputs to internal strategies and used to inspire innovation. As Concur drives to provide the best solutions for clients, Concur will continue to improve the interface to meet that need. The evolving user experience will start in 2014 and will be ongoing as Concur continues to strive for excellence in partnership with clients.

Specific product lines impacted are:

- Travel (Standard, Professional)
- Expense (Standard, Professional, Small Business)
- Invoice Management (Standard, Professional)
- Request (Professional)
- TripLink

Key features and enhancements are:

- Enhanced Home and Expense pages with effortless navigation and a modern consumer-based application "Look-and-Feel"
- A streamlined travel summary and booking workflow process
- Consistent terminology and iconography – across all product lines including Travel, Expense, and Invoice

- A dashboard design with logical grouping of like functions and tasks to minimize the number of popups or pages required to complete a specified task
- A facts and stats section with key metrics and other helpful information for the user
- Actions, alerts, and notifications that are clearly defined and visible
- Vastly improved smart matching of expenses and receipts as a result of combining key functions on the same page
- Easy access to help, support, and other key resources

## Schedule and Activation – Professional Edition

Implementation of the enhanced UI will start for approved early-adopter clients in August 2014. General release is scheduled to begin in October 2014 and will run through early 2015. During this time, general-release clients will be allowed to preview the enhanced interface and related changes.

There will be several options available for users to become familiar with the enhanced UI and introduce it in the company:

- By admin
- By selected users
- By groups/travel classes
- For the entire company

All of these options are described below as well as the role/permission that an admin must have in order to make the enhanced UI available to users

---

**NOTE:** As the availability period approaches, you will receive more information (and screen samples) about how these tasks are completed.

---

### ***By Admin***

The admin can individually toggle between the current interface and the enhanced UI for his/her own work session. Only that admin sees the enhanced UI; no other users are impacted. This way, the admin can learn about the changes before enabling it for other users.

*Who can do this?*

If an admin's roles/permissions provide access to the **Administration** menu, then the admin will be able to toggle the enhanced UI for himself/herself.



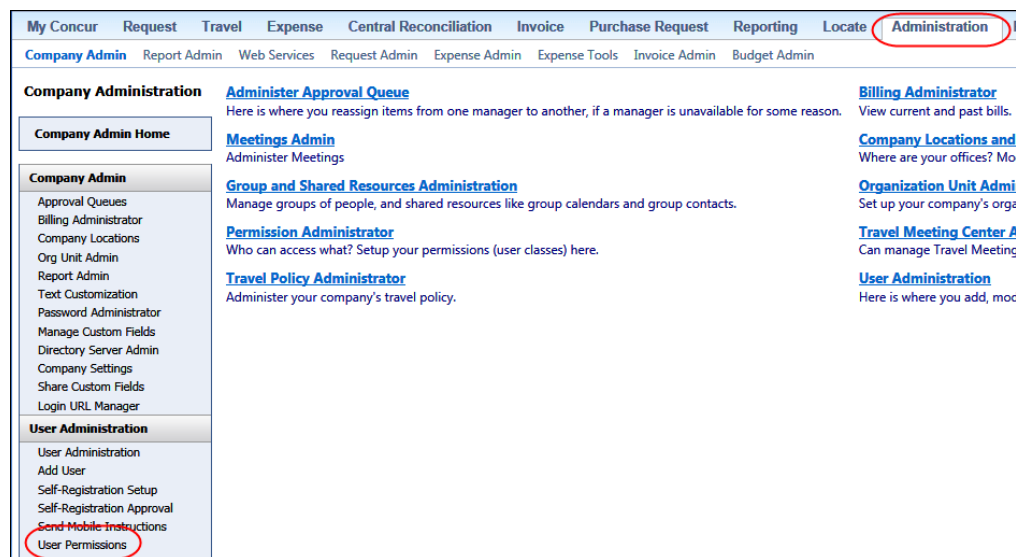


### ***By Selected Users***

The admin can turn on the enhanced UI for selected individual users, for example, a selected set of admin assistants or power users. These users will likely act as a resource to help others during the transition.

### **WHO CAN DO THIS?**

If an admin's roles/permissions provide access to the **User Permissions** option on the left menu, then the admin will be able to enable the enhanced UI for individual users.



### ***By Groups/Travel Classes***

The admin can turn on the enhanced UI for selected groups of users. This allows deployment of the enhanced UI to any new implementations of divisions or groups immediately and it also allows the company to gradually rollout the new UI.

### WHO CAN DO THIS?

- ♦ For Expense, Invoice, and Request – the admin can provide access by Employee Group. The admin must have one of these:
  - Expense Configuration Administrators assigned to the global level
  - Invoice Configuration Administrators assigned to the global level
  - Request Configuration Administrators assigned to the global level
- ♦ For Travel – the admin can provide access by group. The admin must be able to access the **User Permissions** option on the left menu and can assign the proper permission to a group or travel class.

### **Entire Company**

The admin can turn on the enhanced UI of all users and will also be able to revert back to the prior UI if necessary.

### WHO CAN DO THIS?

- ♦ For Expense, Invoice, and Request – the admin can provide access by Employee Group. The admin must have one of these:
  - Expense Configuration Administrators assigned to the global level
  - Invoice Configuration Administrators assigned to the global level
  - Request Configuration Administrators assigned to the global level
- ♦ For Travel – The admin must have the Company Admin or Travel System Admin permissions.

### IMPORTANT!!

If the company has multiple admins and multiple Concur products, be aware that coordination is required among the admin team to achieve the desired results. Be aware that a user will have access if an admin provides him/her access in **any** of the ways described above.

For example, assume that a company uses Concur Travel and Expense. Further assume that the Expense admin wants to provide access to only a select set of individuals while the Travel admin wants to assign access to an entire travel class. The result is that **everyone** in that travel class who is also an Expense user will have access to the **entire** Travel and Expense UI.

## Schedule and Activation – Standard Edition

Implementation of the enhanced user interface (UI) will start for approved early-adopter clients in August 2014. General release is scheduled to begin in October 2014 and will run through early 2015. During this time, general-release clients will be allowed to preview the enhanced interface and related changes.

There will be two options available for users to become familiar with the enhanced UI and introduce it in the company:

- By Administrator
- For the entire company

---

**NOTE:** As the availability period approaches, you will receive more information (and screen samples) about how these tasks are completed.

---

### ***By Admin***

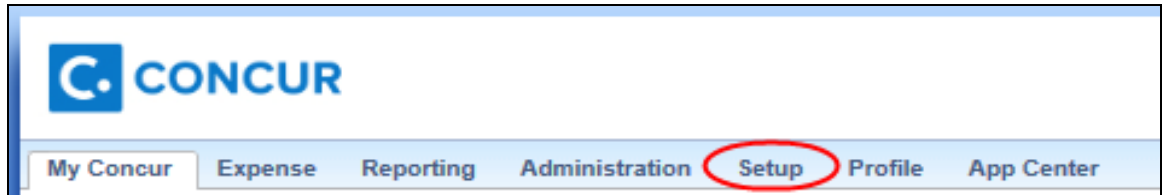
The administrator can individually toggle between the current interface and the enhanced UI for his/her own work session. Only that administrator sees the enhanced UI; no other users are impacted. This way, the administrator can learn about the changes before enabling it for other users.

### ***Entire Company***

The administrator can turn on the enhanced UI of all users and will also be able to revert back to the prior UI if necessary.

#### **WHO CAN DO THIS?**

The administrator will be able to enable the enhanced UI for himself/herself or for the company.



---

#### **! IMPORTANT!**

If your company has multiple administrator and multiple Concur products, be aware that coordination is required among the admin team to ensure all are ready to switch the company to the enhanced user interface.

---

## **Resources**

Here is a link for a quick look:

<https://www.concur.com/en-us/introducing-concur-user-experience-updates>

Clients can look at the new user interface, read about some of the changes and how these changes impact their business, and provide feedback.

Later, Concur will provide additional communications, webinars, videos, and messaging. Clients can also leverage standard support channels as well as social media to stay informed and provide feedback.

# Price-to-Beat and Travel Points Limited Availability

## Overview

Concur Price-to-Beat and Travel Points are features designed to help companies of all sizes align their travelers' purchasing behavior with the company's overall budget objectives. By providing relevant information during the decision-making process, and allowing companies to administer incentives to travelers who make smart choices, Concur delivers another layer of travel policy enforcement and budget control.

The Price-to-Beat and Travel Points features are currently available to certain clients. The functionality will be available to all TripLink clients in future releases. If you want to activate this feature for your company, contact Concur Client Services.

### ***Price-to-Beat***

This feature provides configurable price targets presented within the application to help travelers understand what they should expect to spend in specific air city-pairs and/or hotel markets. Price-to-Beat targets can be used by companies to encourage travelers to make cost-effective choices at the point of purchase.

The Price-to-Beat can be customized by the client from one of these starting points:

- **Hotel and Airfare:** The data behind millions of travel bookings and expense reports filed in Concur's Travel IQ database.
- **Airfare Only:** The Customer's defined parameters for Lowest Logical Fare.
- **Hotel Only:** For Professional Travel companies: Regional Hotel Rates will be used as the Price-to-Beat, if defined for a given hotel.

### ***Travel Points***

This feature provides points awarded by the company to travelers as an incentive for selecting options under the Price-to-Beat.

Travel Points are funded by the savings a traveler achieves when selecting options under the Price-to-Beat, and will most commonly be used for policy relief for future business travel plans when choosing options above the Price-to-Beat.

The company has full configuration control over how Travel Points are awarded (what percentage of savings is shared with the traveler) and/or spent.

### **BUSINESS PURPOSE/CLIENT BENEFIT**

These enhancements provide travelers with more information and incentives to book travel at company defined price targets.

### ***Feature Details***

These features include the following functionality:

- User roles: Travel Points User and Travel Points Administrator
- Price-to-Beat banner on the Travel search results page.
- **Price-to-Beat** page where users can view their activity and total, as well as search for a Price-to-Beat for trips they need to book outside of Concur.
- Travel Points now appear on the itinerary pages after booking.
- New **Price-to-Beat Configuration** page allows the administrator to set program details:
  - ◆ Whether users can earn Travel Points for Air or Hotel
  - ◆ Whether users can redeem Travel Points
  - ◆ Price-to-Beat information source (Calculated Comparison Rate or Lowest Logical Fare)
  - ◆ Rules, based on percentages, to set when travelers receive or must pay Travel Points, how much of the cost savings is applied to Travel Points, and more.
  - ◆ The tracking period for Travel Points, how often they reset, and how many can be rolled over between periods, if any.
- New Travel Points report allows the administrator to view Travel Points activity by company or user.



For more information, refer to the *Price-to-Beat and Travel Points User Guide for TripLink*.

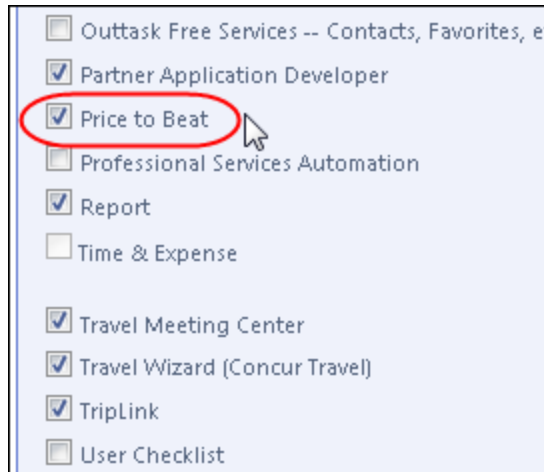
## Configuration/Feature Activation

### **Concur**

Concur must activate the Price-to-Beat module for the company.

#### ▶ **To activate Price-to-Beat:**

1. Log in as Concur Admin.
2. Select **Administration > Concur Admin**.
3. Click **Modify Customers**.
4. Search for the customer.
5. Click **Edit Company Details**.
6. Select (enable) the **Price to Beat** module.



7. Click **Apply**.

### ***Standard Edition Clients***

Price-to-Beat and Travel Points are add-ons to the TripLink product. The administrator can perform the following configuration steps:

- Assign the Travel Point User and Travel Points Admin user roles.
- Configure the Price-to-Beat settings.
- Activate and configure the Travel Points program.

#### **ASSIGN USER PERMISSIONS**

The administrator must assign the appropriate user roles before the users will see this feature. The Travel Points User role and the Travel Points Administrator role can be assigned at the user level.

### ***Professional Edition Clients***

Price-to-Beat and Travel Points are add-ons to the TripLink product. The administrator can perform the following configuration steps:

- Assign the Travel Point User and Travel Points Admin user roles.
- Configure the Price-to-Beat settings.
- Activate and configure the Travel Points program.

#### **ASSIGN USER PERMISSIONS**

The administrator must assign the appropriate user roles before the users will see this feature.

The Travel Points User role and the Travel Points Administrator role can be assigned at the (Travel) **Group** level, the (Travel) **Rule Class** level, or the individual **User** level.

## Price-to-Beat Configuration Page

The **Price-to-Beat Configuration** page allows the administrator to set the Travel Points options for their company.



For more information, refer to the *Price-to-Beat and Travel Points User Guide for TripLink*.

## Ability to Mark TripLink Trips as Personal

### Overview

Clients can now mark trips imported through TripLink as *Personal*. A new link, labeled **Mark Personal Trip**, is now available in the Trip Library, and on the **Upcoming Trips** tab in Concur. When a user marks the trip as *Personal*, the trip is removed from Concur. If the trip exists in TripIt, it will be marked as a leisure trip there.

### What the User Sees

The user can mark a trip as personal using the **Mark Personal Trip** link:

The screenshot shows the 'Upcoming Trips' tab selected. At the top, there are tabs for 'Company Notes', 'Travel Map', 'Upcoming Trips', and 'Trips Awaiting Approval'. Below the tabs is a button 'Add new itinerary manually'. A table lists trips with columns: 'Trip Name/Description', 'Status', 'Start Date', 'End Date', and 'Action'. One trip is listed: 'My Personal Trip' with status 'Confirmed', start date '08/26/2014', and end date '08/29/2014'. The 'Action' column for this trip contains links 'Remove' and 'Mark Personal Trip'. A red arrow points to the 'Mark Personal Trip' link. Below the table is a green box with a lightbulb icon and the text 'Manage your trip details in one place.' and a green checkmark icon.

Trip Name/Description	Status	Start Date	End Date	Action
My Personal Trip	Confirmed	08/26/2014	08/29/2014	<a href="#">Remove</a>   <a href="#">Mark Personal Trip</a>

The user is prompted to confirm this change:

The dialog box has a title bar with a close button (X). The main content area has a green question mark icon and the following text: 'Setting a trip to personal means this trip will no longer be available within Concur or visible to your company. If this trip already exists in your TripIt account, it will be marked as Leisure and kept there.' At the bottom, there are two buttons: 'Yes' and 'No'.

**Proceed with Marking as a Personal Trip?**

Setting a trip to personal means this trip will no longer be available within Concur or visible to your company.  
If this trip already exists in your TripIt account, it will be marked as Leisure and kept there.

Yes No

## BUSINESS PURPOSE/CLIENT BENEFIT

This update provides more options for managing TripLink itineraries. Clients can ensure that leisure itineraries are not skewing their visibility into future spend or resulting in travel policy violations. Travelers with privacy concerns can remove personal itineraries from company visibility that were inadvertently sent to Concur by not being marked personal within TripIt in advance.

## Configuration/Feature Activation





The feature is automatically on; there are no additional configuration or activation steps.

## Hotel Search Results Layout Updated






### Overview

The search result layout for hotel searches has been redesigned. The new layout includes a streamlined presentation. Clients using Price-to-Beat or Price-to-Beat and Travel Points see additional information. The hotel search results have three possible layouts:

1. No Price-to-Beat or Travel Points enabled:

<b>1. Embassy Suites Las Vegas</b> 		<b>from</b> <b>\$124</b>  <a href="#">choose room &gt;</a>
	4315 Swenson Street Las Vegas, NV 89119 1.56 miles <a href="#">View map</a> 	
 e-receipt enabled <a href="#">more info</a> <a href="#">compare</a>		

2. Price-to-Beat enabled:

<b>1. Embassy Suites Las Vegas</b> 		<b>Price-to-Beat \$465</b> 
	4315 Swenson Street Las Vegas, NV 89119 1.56 miles <a href="#">View map</a> 	<b>from</b> <b>\$124</b>
 e-receipt enabled <a href="#">more info</a> <a href="#">compare</a>		<a href="#">choose room &gt;</a>

3. Price-to-Beat and Travel Points enabled:



1. Embassy Suites Las Vegas		◆◆◆
	4315 Swenson Street Las Vegas, NV 89119 1.56 miles <a href="#">View map</a>	
	★★★★☆	
 e-receipt enabled <a href="#">more info</a> <a href="#">compare</a>		+106 Pts Price-to-Beat \$465 ?  from <b>\$124</b>  <a href="#">choose room &gt;</a>

### **BUSINESS PURPOSE/CLIENT BENEFIT**

This enhancement provides easier readability of hotel results, and clear visual indicators about Price-to-Beat and Travel Points.

### **Configuration/Feature Activation**

The feature is automatically on; there are no additional configuration or activation steps. The additional details will appear for clients who utilize Price-to-Beat and/or Travel Points.

# Supported Configurations

---

Monthly browser certifications, both current and planned, are available on the **Release Notes** page.

## Internet Explorer 7 – To Be Discontinued

### Overview

Concur will be refreshing the web-based user interface to implement features and functionality that will provide clients with an enhanced experience for our solutions, while minimizing impact to their organizations and the change they need to manage. This refresh will help respond to feedback from our clients by:

- Enhancing the user's experience for all of Concur's products by modernizing the user interface
- Complying with [WCAG 2.0 AA](#) from the World Wide Web Consortium (W3C) and [Section 508 of the US Rehabilitation Act of 1973](#)
- Architecting the back-end technology to allow for the short-term changes and to better position Concur's products for changes in the future while reducing end-user impact

The first step in the process is to evolve the user experience with a focus on a redesigned interface and foundational changes in key areas of functionality. We will be delivering a redesigned, modern user interface for all products on <http://www.concursolutions.com>:

- Modern consumer based application look-and-feel that will be applied across all products
- Consistent terminology, iconography, and interaction across web and mobile applications
- Dashboard design with grouping of like functions and tasks and positioning key steps needed to complete a process at logical locations on the page

This refresh takes advantage of the most recent web browser technologies to provide users with a premium user experience. *As a result, IE 7 will no longer be a supported browser for users when they are transitioned to the new user interface; **for the best user experience, Concur recommends IE 10 or higher, as well as Google Chrome 30.0 or higher, and Mozilla Firefox 25.0 or higher.***

### What the User Sees

Users who log in to Concur with Internet Explorer 7 (IE7) will now see a banner at the top of every page that reads: *Support for this version of Internet Explorer (7) will be discontinued in Dec 2014. Please contact your Concur Administrator or IT Department to determine when and how to upgrade.*

Users can click **Close** on any page to get more space, but it will appear again on every subsequent page.



## Configuration / Feature Activation

The feature is automatically on; there are no additional configuration or activation steps.

## Monthly Browser Certifications

Monthly browser certifications, both current and planned, are available with the other Concur monthly release notes.

Refer to *Additional Release Notes and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

# Additional Release Notes and Technical Documentation

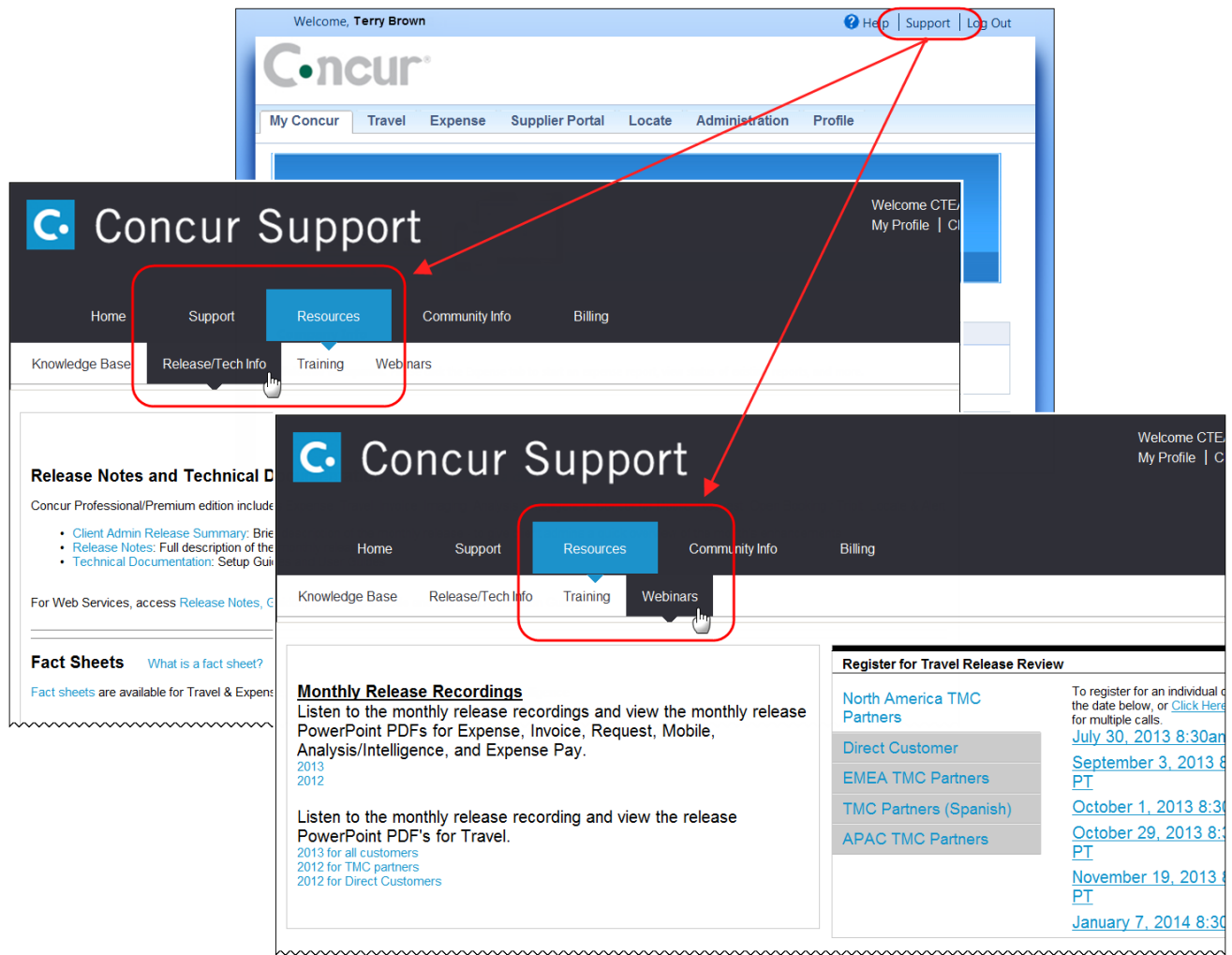
## Professional Edition

### Concur Support Portal

Access release notes, webinars, and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur. Click **Support** and then – in the Concur Support portal – click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



**NOTE:** If you use a user interface layout **other than** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

The screenshot shows the Concur Admin interface. At the top, a welcome message for Chris Collins is displayed. The main navigation bar includes links for My Concur, Request, Travel, Expense, Central Reconciliation, Invoice, Purchase Request, Reporting, Locate, and Admin. A red circle highlights the Help menu, which contains links for Training, Travel Help, Travel Administration Help, Locate & Alert Help, Expense Help, Invoice Help, Expense Tools Help, Expense Administration Help (highlighted with a red circle and a hand icon), Invoice Administration Help, Request Help, Request Administration Help, and Budget Admin Help. Below the Help menu, the Expense Administration - Feature Documentation page is shown. It includes a Quick Links section with links for Client Admin Release Summary - What's New, Client Release Notes - All Products, Client Fact Sheets, and Concur Training Toolkit. A table titled Expense Setup Guides lists various documents and their revision dates. A red arrow points from the Expense Administration Help link in the Help menu to the Expense Administration - Feature Documentation page.

Name	Revised	Format
Account Codes	Oct 19 2012	DOC - PDF
Allocations	Oct 19 2012	DOC - PDF
Attendees	June 14 2013	DOC - PDF
Audit Rules	Jul 1 2013	DOC - PDF
Audit Rules (Validation Rules)	Sep 23 2011	DOC - PDF
Authorization Requests (legacy Expense feature) - new clients, refer to Concur's Request service	Jun 22 2012	DOC - PDF

## Standard Edition

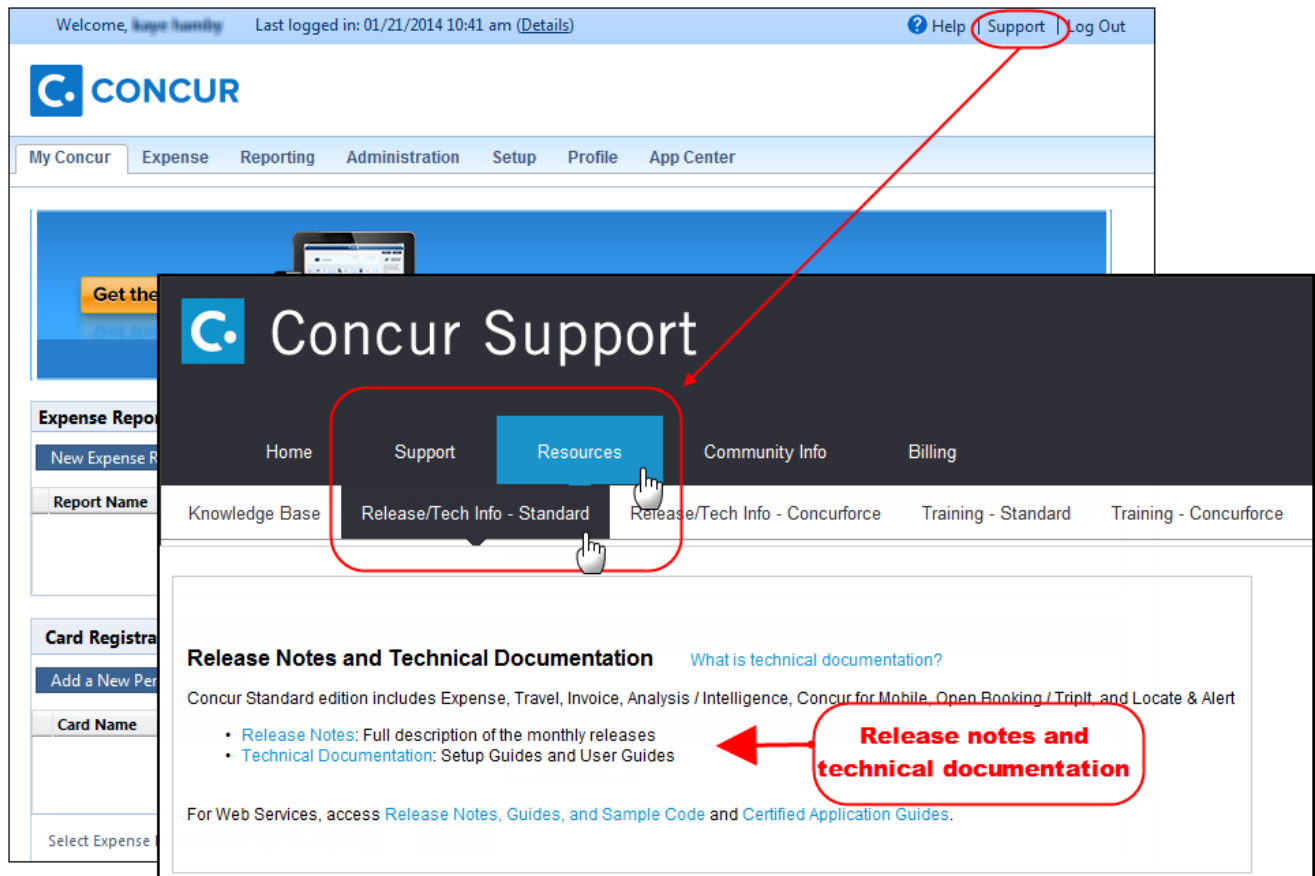
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You can access release notes and other technical documentation on the Concur Support Portal.

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Click **Support**, and then, in the Concur Support Portal, click **Resources**.

Click **Release/Tech Info - Standard** for release notes, technical documents etc.



## Online Help – Admins

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**Expense Setup and Administration**

Help Search

**Technical Documentation**

- Setup and User Guide**
- What's New - Expense
- What's New - Concur's mobile app
- What's New - Concurforce

**Intuit Toolbar**

- Using Online Help**
- Setup**
  - Approval Routing
  - Car Configuration
  - Company Card
  - Com...
- Cost**
- Qu**
- Ot**
- Expe**
- Intro**
- Empl**
- File**

**Use Online Help**

**Navigate Help**

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# Release Notes

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## Price-to-Beat: Now Displays in Full Dollar Amounts

### Overview

The Price-to-Beat is calculated using the company's configuration. The Calculated Comparison Rate includes two decimal places, and the two decimal places are retained throughout the calculation. Before displaying the final Price-to-Beat to the user, Concur rounds the amount to the closest full unit of currency.

#### **BUSINESS PURPOSE/CLIENT BENEFIT**

This update makes the Price-to-Beat easier for users to remember and use.

### Configuration/Feature Activation

The feature is automatically on; there are no additional configuration or activation steps.

## Price-to-Beat: New Settings to Award Bonus Points for Preferred Vendors

### Overview

Concur has added two new settings on the **Price-to-Beat Configuration** page, allowing admins to award bonus Travel Points to users that book Air or Hotel segments with the company's preferred vendors. The bonus points are configured and awarded separately for Air or Hotel segments.

#### **BUSINESS PURPOSE/CLIENT BENEFIT**

This enhancement provides an additional method to incent users to book with preferred carriers.

## What the Admin Sees


The **Price-to-Beat Configuration** page has two new settings in the **Bonus Travel Points** section:

Bonus Travel Points		
Number of points to reward travelers with if:		
	Air	Hotel
Booked 7 days or more in advance	<input type="text"/>	
Booked in Concur Travel	<input type="text"/>	<input type="text"/>
Booked with a preferred vendor 	<input type="text"/>	<input type="text"/>

## Configuration/Feature Activation

The feature is available for clients with TripLink that utilize Price-to-Beat.

The two settings are configured on the **Price-to-Beat Configuration** page.

Bonus Travel Points		
Number of points to reward travelers with if:		
	Air	Hotel
Booked 7 days or more in advance	<input type="text"/>	
Booked in Concur Travel	<input type="text"/>	<input type="text"/>
Booked with a preferred vendor 	<input type="text"/>	<input type="text"/>

Preferred carriers are configured in:

- Professional: **Administration > Company Admin > Manage Corporate Discounts** (under Travel Administration)

[My Concur](#)
[Request](#)
[Travel](#)
[Expense](#)
[Central Reconciliation](#)
[Invoice](#)
[Purchase Request](#)
[Reporting](#)
[Locate](#)
[Administration](#)
[Profile](#)
[App Center](#)

[Company Admin](#)
[Report Admin](#)
[Web Services](#)
[Localization Tool](#)
[Price-to-Beat Configuration](#)
[Request Admin](#)
[Expense Admin](#)
[Expense Tools](#)
[Invoice Admin](#)
[Budget Admin](#)

Agent Links

**Travel Admin**

**Company Travel Setup**

- Manage Corporate Discounts
- Manage CIBT Configuration
- Manage Segment Fees
- Manage TravelFusion B2B Credentials

**Administering discounts for: RandomVerbs.com**
[Add System-wide Air Discount](#)

Choose a company travel configuration.  
No Travel Config selected - manage company-wide discounts
Choose
Choose a GDS Type  
Apollo

[Add air discount](#)

Air Vendors

Vendor	Discount Type	Discount Code	TriLink Discount Code	Days Advance	Meeting Name	Valid From	Valid Until	Preference
No records found.								

[Add hotel chain discount](#)

Hotel Vendors

Vendor	Discount Code	TriLink Discount Code	CD Number	Valid From	Valid Until	Preference
No records found.						

When adding a discount, the administrator selects the preference level for the vendor. Any selection other than *Not Preferred* marks the vendor as a preferred vendor for this TripLink setting.

**Airline discount for RandomVerbs.com**

This discount will be applied to all travelers in RandomVerbs.com for GDS Apollo unless a travel config-level discount is available for the same vendor.

Vendor: Air Canada
Promo Code:
Discount Code:

☒ Company preferred carrier  
☐ Programmed Fare  
☐ ATPCO Passenger Type Code

TriLink Discount Code:

**Optional Information:**

Zone fare class of service:
If zone is not available or does not quote:
☒ Do Nothing  
☐ Shop lowest price on plane, regardless of cabin  
☐ Shop lowest price on plane, regardless of cabin without discount

Class of service codes for "View More Air Fares":

Advance Purchase Number of Days: None
Minimum Number of nights to stay:
☐ Saturday Night Stay Required

Preference:
Valid From:
Valid Until:

Preferred  
Most Preferred  
Preferred  
Less Preferred  
Not Preferred

Discount Flags:
☐ SNAP/PrivateFare/Securate/Corporate code/ATPCO: search only for Private fares  
☐ SNAP/PrivateFare/Securate/Corporate code/ATPCO: extra search for only Public fares in addition to Private

Submit Cancel

- Standard: **Setup > Travel > Discounts and Travel Content**

**Discounts and Travel Content**

This step allows you to add vendor discounts, enable direct connect providers and import hotel property discounts.

1) Travel Policy  
2) Travel Rules  
3) Configurable Messaging  
4) Custom Text  
5) Organization Units  
6) Policy Violation Codes  
7) Company Locations  
8) Form of Payment  
9) Discounts and Travel Content  
10) Custom Trip Fields  
11) Custom Profile Fields  
12) Unused Tickets  
13) Site Customization  
14) Manage Users  
15) Agency Settings

Please select the travel configuration you want to update.  
Brooks Development 381 (US)

To add a vendor discount, click Add Air Discount, Add hotel Chain Discount, etc. Please work with your fulfillment travel agency for details. Your agency will provide the codes needed to access your discounts. To import hotel property discounts, click the Import Hotel Discounts tab. To enable a direct connect provider, click the Direct Connects tab.

Discounts | Hotel Import/Export | Direct Connect | Visa / Passport Services | Travelfusion Suppliers | Government Rates

[Add Air Discount](#)

Air Vendors

Vendor	Discount Type	Discount Code	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.						

[Add Hotel Chain Discount](#)

Hotel Vendors

Vendor	Discount Code	CD Number	TripLink Discount Code	Valid From	Valid Until	Preference
No records found.						

When adding a discount, the administrator selects the preference level for the vendor. Any selection other than *Not Preferred* marks the vendor as a preferred vendor for this TripLink setting.

**Add Discount**

**Airline Discount for Travel Config: Brooks Development 381 (US)**

Save Cancel

To add an airline discount, complete the fields below. Your fulfillment travel agency will provide the discount code. You may also highlight a vendor even if you do not have a discount by choosing Company Preferred Vendor. Be sure to click Submit to save your changes.

Vendor  
Air Canada

Discount Code

☒ Company preferred carrier  
☐ SNAP code  
☐ ATPCO standard passenger type code  
☐ Manual 3.75 pricing command (zone fare only)

TripLink Discount Code

**Optional Information**

Preference  Valid From  Valid Until

Preferred  
Most Preferred  
Preferred  
Less Preferred  
Not Preferred

Save Cancel

## Two User Interfaces – Enhanced UI – Professional Edition

In October, the transition from the *current* user interface to the *enhanced* user interface will begin.

The image displays two versions of the Concur user interface side-by-side. The left version is the 'Current user interface', which has a more traditional, cluttered layout with a top navigation bar and a left sidebar. The right version is the 'Enhanced user interface', which features a modern, clean design with a dark header, a top navigation bar, and a dashboard with various widgets and cards. A red callout box labeled 'Current user interface' points to the left version, and a yellow callout box labeled 'Enhanced user interface' points to the right version.

**Current user interface**

**Enhanced user interface**

As described previously in the monthly release notes, the enhanced UI brings some long-awaited usability enhancements – some are significant (perhaps involving navigation changes) while others are minor (involving only look-and-feel).

## Quick Look

Take a quick look at the enhanced UI:

<https://www.concur.com/en-us/introducing-concur-user-experience-updates>

## Getting Ready – Transition Guides

Two guides are available to help you and your users understand the enhancements. The "highlights" guide (about 13 pages) is designed for end users and describes the most significant changes that impact them. The "comprehensive" guide (about 70 pages) is designed for admins. It describes:

- The steps required **before** transitioning to the enhanced UI
- The preview period for the admin, for selected users, for selected groups, and for the entire company
- All of the enhancements – both significant and minor

To help with your training needs, you can provide the guides to your admins and/or end users "as is" – or you use any or all of either guide to create your own training materials – or you can cut, copy, paste, delete or otherwise edit either guide at will.

Access the guides here:

[http://www.concurtraining.com/customers/tech\\_pubs/GW/ TransGuidesProf.htm](http://www.concurtraining.com/customers/tech_pubs/GW/ TransGuidesProf.htm)

## Release Notes – Sample Screens and Menu Navigation

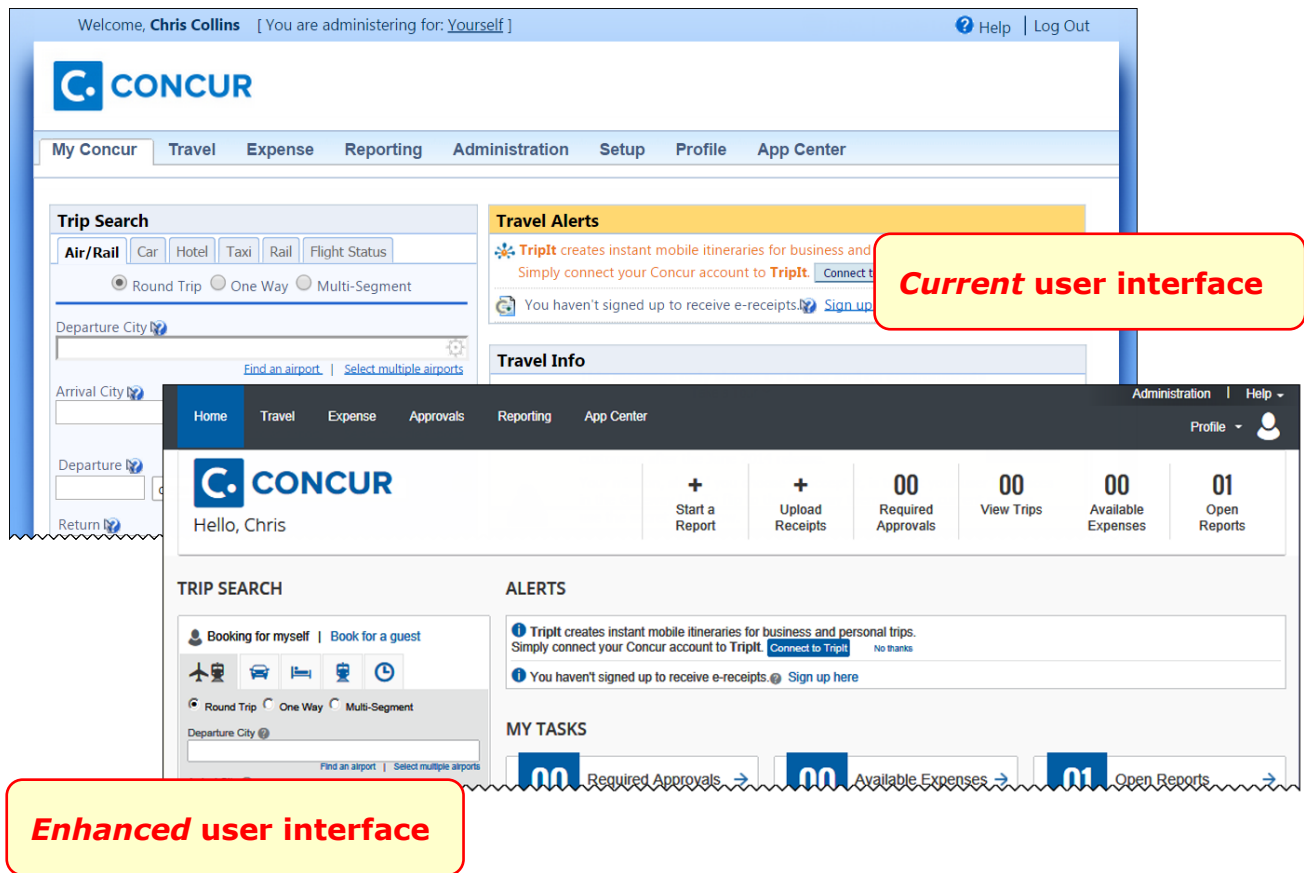
For screen samples, the monthly release notes may show the *current* UI, the *enhanced* UI, or both. Over time, all screen samples will appear only in the *enhanced* UI.

In those cases where the menu navigation is different, we will provide both sets of steps. Example:

1. In the *current* UI, click **Profile > Other Settings** (left menu).  
– or –  
In the *enhanced* UI, click **Profile > Profile Settings > Other Settings** (left menu).

## Two User Interfaces – Enhanced UI – Standard Edition

In October, the transition from the *current* user interface to the *enhanced* user interface will begin.



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– or –  
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# Supported Configurations

---

Monthly browser certifications, both current and planned, are available on the **Release Notes** page.

## Internet Explorer 7 – To Be Discontinued

### Overview

Concur will be refreshing the web-based user interface to implement features and functionality that will provide clients with an enhanced experience for our solutions, while minimizing impact to their organizations and the change they need to manage. This refresh will help respond to feedback from our clients by:

- Enhancing the user's experience for all of Concur's products by modernizing the user interface
- Complying with [WCAG 2.0 AA](#) from the World Wide Web Consortium (W3C) and [Section 508 of the US Rehabilitation Act of 1973](#)
- Architecting the back-end technology to allow for the short-term changes and to better position Concur's products for changes in the future while reducing end-user impact

The first step in the process is to evolve the user experience with a focus on a redesigned interface and foundational changes in key areas of functionality. We will be delivering a redesigned, modern user interface for all products on <http://www.concursolutions.com>:

- Modern consumer based application look-and-feel that will be applied across all products
- Consistent terminology, iconography, and interaction across web and mobile applications
- Dashboard design with grouping of like functions and tasks and positioning key steps needed to complete a process at logical locations on the page

This refresh takes advantage of the most recent web browser technologies to provide users with a premium user experience. *As a result, IE 7 will no longer be a supported browser for users when they are transitioned to the new user interface; **for the best user experience, Concur recommends IE 10 or higher, as well as Google Chrome 30.0 or higher, and Mozilla Firefox 25.0 or higher.***

### What the User Sees

Users who log in to Concur with Internet Explorer 7 (IE7) will now see a banner at the top of every page that reads: *Support for this version of Internet Explorer (7) will be discontinued in Dec 2014. Please contact your Concur Administrator or IT Department to determine when and how to upgrade.*

Users can click **Close** on any page to get more space, but it will appear again on every subsequent page.



## Configuration / Feature Activation

The feature is automatically on; there are no additional configuration or activation steps.

## Monthly Browser Certifications

Monthly browser certifications, both current and planned, are available with the other Concur monthly release notes.

Refer to *Additional Release Notes and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

# Additional Release Notes and Technical Documentation

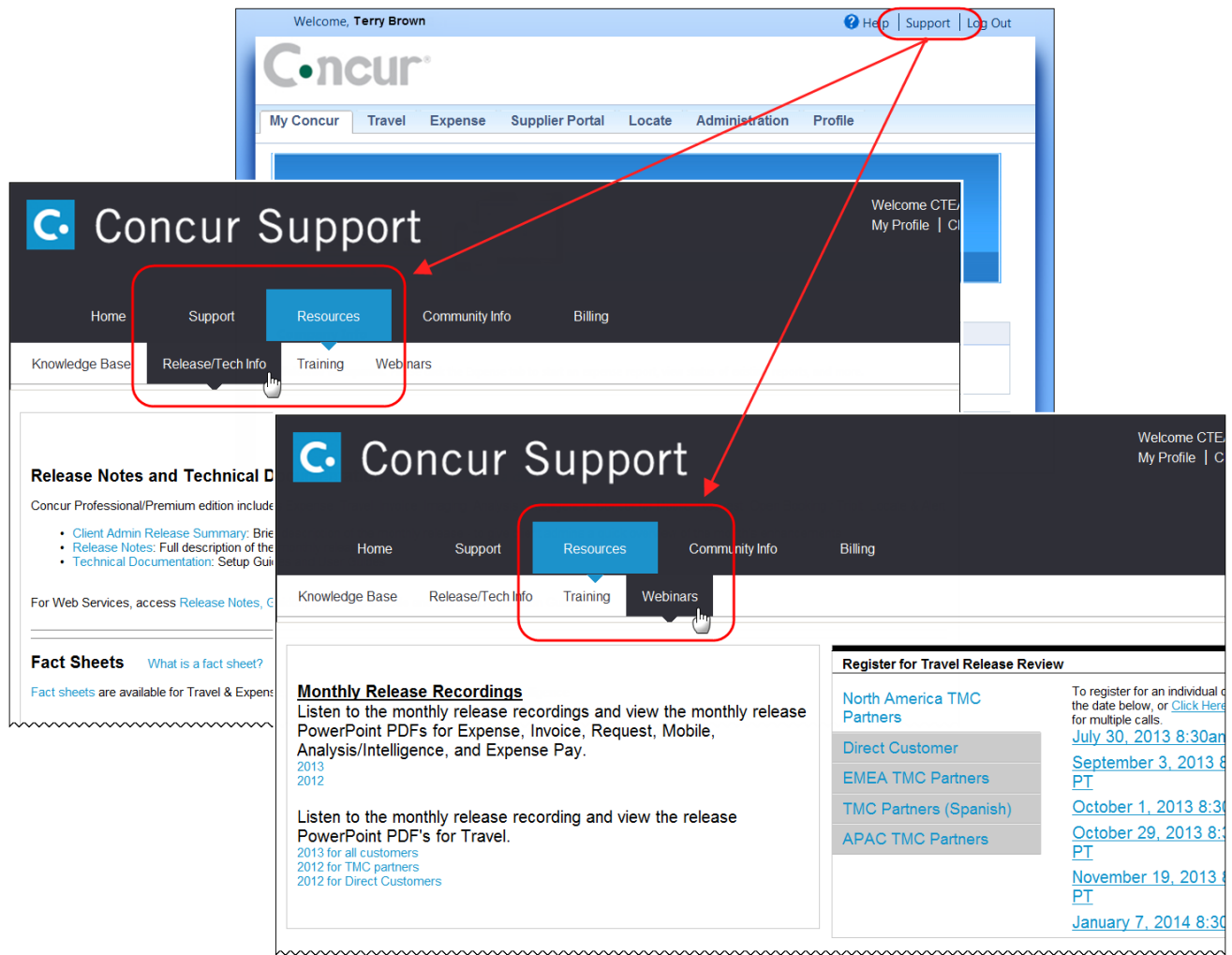
## Professional Edition

### Concur Support Portal

Access release notes, webinars, and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur. Click **Support** and then – in the Concur Support portal – click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



**NOTE:** If you use a user interface layout **other than** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

The screenshot shows the Concur Admin interface. At the top, a welcome message for Chris Collins is displayed. The main navigation bar includes links for My Concur, Request, Travel, Expense, Central Reconciliation, Invoice, Purchase Request, Reporting, Locate, and Admin. A red circle highlights the 'Help' link in the top right corner. A red arrow points from the 'Expense Administration Help' option in the Help menu to the 'Expense Administration - Feature Documentation' page. The page contains a 'Quick Links' section with links to Client Admin Release Summary, Client Release Notes, Client Fact Sheets, and Concur Training Toolkit. It also features a table of 'Expense Setup Guides' with columns for Name, Revised, and Format.

Name	Revised	Format
Account Codes	Oct 19 2012	DOC - PDF
Allocations	Oct 19 2012	DOC - PDF
Attendees	June 14 2013	DOC - PDF
Audit Rules	Jul 1 2013	DOC - PDF
Audit Rules (Validation Rules)	Sep 23 2011	DOC - PDF
Authorization Requests (legacy Expense feature) - new clients, refer to Concur's Request service	Jun 22 2012	DOC - PDF

## Standard Edition

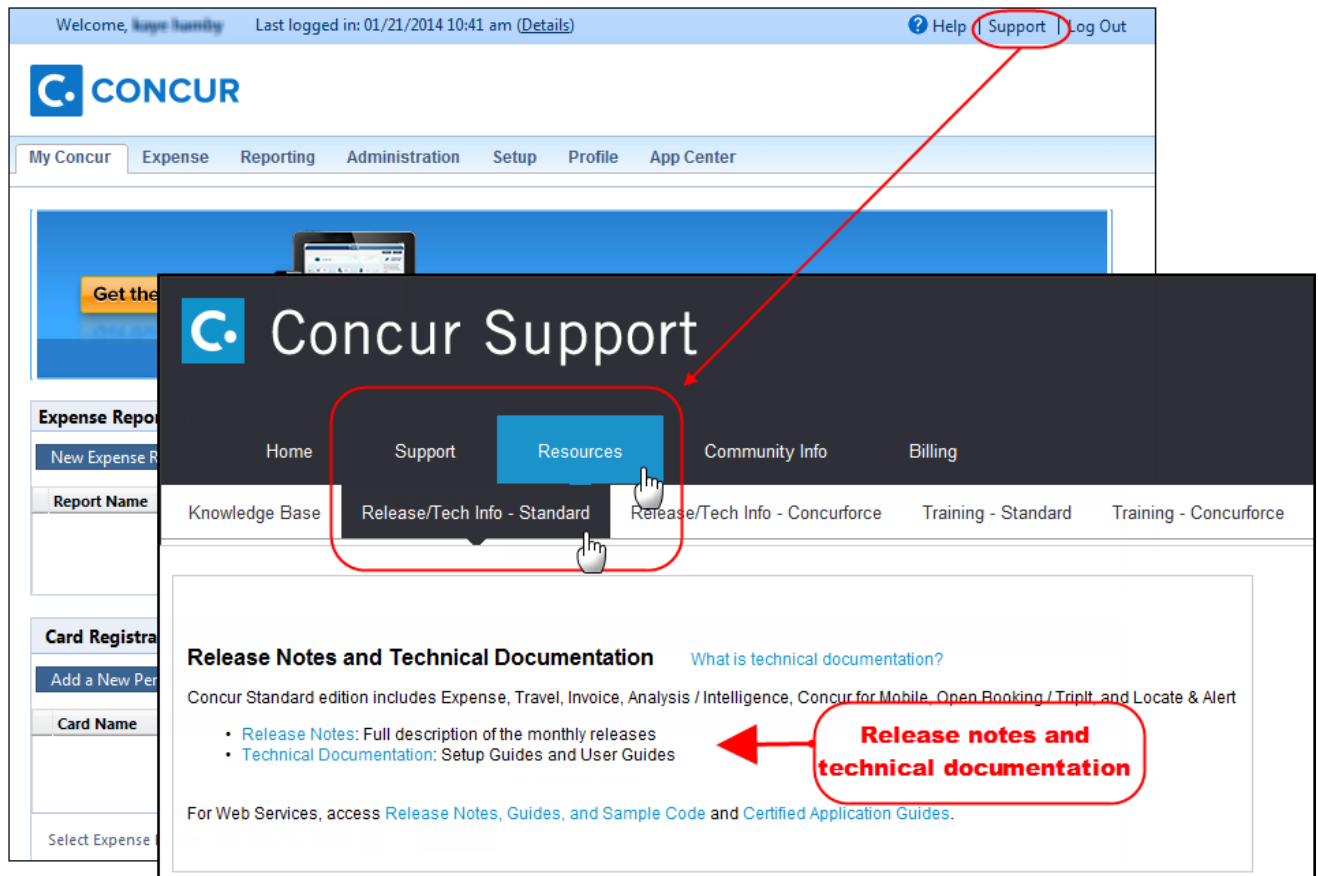
### Concur Support Portal

You can access release notes and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur.

Click **Support**, and then, in the Concur Support Portal, click **Resources**.

Click **Release/Tech Info - Standard** for release notes, technical documents etc.



## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

**Expense Setup and Administration**

Help Search

**Technical Documentation**

- Setup and User Guide**
- What's New - Expense
- What's New - Concur's mobile app
- What's New - Concurforce

**Intuit Toolbar**

- Using Online Help**
- Setup**
  - Approval Routing
  - Car Configuration
  - Company Card
  - Com...
- Cost**
- Qu**
- Ot**
- Expe**
- Intro**
- Empl**
- File**

**Use Online Help**

**Navigate Help**

Use the Help **Back** and **Forward** buttons to go back and forth between topics. These buttons are located in the top right corner of the Help system. Do **not** use the browser's **Back** and **Forward** buttons.

**Change the size of the left and right frames**

You can make the Contents (left) side of the page wider or narrower. To do so:

1. Place the mouse pointer on the gray bar that separates the left (Contents) and right (Help page) frames.
2. Click and drag to the desired width.

### Concur Standard Guides

Guide Name	Available Formats
<b>Expense Setup Guide</b> - Covers the Expense Setup wizard.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Administration User Guide</b> - Covers the Process Reports, Payment Manager, and Reporting features.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Expense Pay Guide</b> - Covers setup and administration of the Expense Pay product.	<a href="#">DOC</a> - <a href="#">PDF</a>

**NOTE:** These documents are provided in English only.

Concur Release Notes	
TripLink	
Month	Audience
October 2014 Initial Post: Friday, October 17, 12:30 PM PT	Concur Clients FINAL

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# Two User Interfaces – Enhanced UI

In October, the transition from the *current* user interface to the *enhanced* user interface will begin.

The image displays two versions of the Concur user interface side-by-side. The 'Current user interface' (left) features a top navigation bar with links like 'My Concur', 'Request', 'Travel', 'Expense', etc. Below this is a 'Trip Search' section with fields for departure/arrival cities, dates, and times. A 'Travel Alerts' section is also present. The 'Enhanced user interface' (right) has a more modern layout with a dark header bar, a user profile section, and a dashboard with various metrics (e.g., '01 New', '01 Open Requests', '00 Purchase Requests', '01 Payment Requests', '21 Available Expenses', '04 Open Reports'). It also includes sections for 'TRIP SEARCH', 'ALERTS', 'COMPANY NOTES', 'MY TASKS', and 'MY TRIPS (1)'. A red callout box labeled 'Current user interface' points to the left side, and a yellow callout box labeled 'Enhanced user interface' points to the right side.

**Current user interface**

**Enhanced user interface**

As described previously in the monthly release notes, the enhanced UI brings some long-awaited usability enhancements – some are significant (perhaps involving navigation changes) while others are minor (involving only look-and-feel).

## Quick Look

Take a quick look at the enhanced UI:

<https://www.concur.com/en-us/introducing-concur-user-experience-updates>

## Getting Ready – Transition Guides

Two guides are available to help you and your users understand the enhancements. The "highlights" guide (about 13 pages) is designed for end users and describes the most significant changes that impact them. The "comprehensive" guide (about 70 pages) is designed for admins. It describes:

- The steps required **before** transitioning to the enhanced UI
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## Release Notes – Sample Screens and Menu Navigation

For screen samples, the monthly release notes may show the *current* UI, the *enhanced* UI, or both. Over time, all screen samples will appear only in the *enhanced* UI.

In those cases where the menu navigation is different, we will provide both sets of steps. Example:

1. In the *current* UI, click **Profile > Other Settings** (left menu).  
– or –  
In the *enhanced* UI, click **Profile > Profile Settings > Other Settings** (left menu).

# Release Notes

---

## Price-to-Beat: New Report

### Overview

Concur has added a new report that allows administrators to compare the Price-to-Beat for bookings to the actual booking price. This report is called Price-to-Beat by Itinerary, and is available in the **Concur TripLink** section of the **Travel Reports** page. The report has the following columns: Itinerary Source, Booking Source, Trip Status, Purchased Date, Number of Days in Advance, Start Date, End Date, Vendor Type, Hotel Property City/Location, Booking Total, Price-to-Beat. The report will include all trip segments, even the ones without a Price-to-Beat (any segments other than Air or Hotel).

The screenshot shows the Concur TripLink interface. On the left is a sidebar menu under the heading 'Reports' with the following items: Concur TripLink, Concur TripLink By Air Supplier, Concur TripLink By Car Supplier, Concur TripLink By Hotel Supplier, Concur TripLink By Rail Supplier, Concur TripLink Supplier Summary by User, Concur TripLink Travel Policy Exceptions, Concur TripLink Users with Validated Email, **Price-to-Beat by Itinerary**, and Travel Points by Itinerary. The main content area is titled 'Price-to-Beat by Itinerary' and includes a link 'Show this Report by default'. Below the title is a description: 'This report shows a list of bookings with the price-to-beat applicable at the time of booking.' There is a 'Date Range' section with dropdown menus for 'By Month' (set to October), '2014', and a 'Submit' button. To the right of the date range is a dropdown menu set to 'HTML (display to Screen)'.

### BUSINESS PURPOSE/CLIENT BENEFIT

This report allows administrators to identify savings achieved on each segment to better analyze spend data, spot trends, and optimize the travel & expense program.

### Configuration/Feature Activation

The feature is available to TripLink clients with Price-to-Beat activated.

## Travel Points: Report Updated

### Overview

Concur has updated the **Travel Points Detail** report, renaming it and moving it to a new location. The report is now called **Travel Points by Itinerary**, and it appears in the **Reporting > Travel Reports > Concur TripLink** area.

Reports

Concur TripLink
Concur TripLink By Air Supplier
Concur TripLink By Car Supplier
Concur TripLink By Hotel Supplier
Concur TripLink By Rail Supplier
Concur TripLink Supplier
Concur TripLink Summary by User
Concur TripLink Travel Policy Exceptions
Concur TripLink Users with Validated Email
Price-to-Beat by Itinerary
**Travel Points by Itinerary**

### Travel Points by Itinerary

[Show this Report by default](#)

This report returns transactions for Travel Points.

Date Range
By Month
October
2014

Report
HTML (display to Screen)
Submit

☒ Rule Class
☐ Login ID

Any

Segment Type
Any
Transaction Type
Any

#### BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement clarifies the report purpose.

### Configuration/Feature Activation

The feature is available to TripLink clients with Travel Points activated.

## Travel Discounts Page Now Supports Non-GDS Vendors

### Overview

Concur has updated the Travel Discounts page to include vendors that are not represented in the GDS. These vendors now appear with a distinctive highlight in the Vendor field. The administrator can use the **Add <vendortype> discount** page to configure a preference level for the vendor.

#### BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement allows administrators to set a preference level for travel vendors that are outside the GDS.

## What the Admin Sees

### Professional Edition

The preferred status of non-GDS vendors is configured on the travel discount configuration page. This page is located:

In the *current* UI, click **Administration > Company Admin > Travel Administration** (left menu) > **Manage Corporate Discounts**.

- or -

In the *enhanced* UI, click **Administration > Travel Administration** (left menu) > **Manage Corporate Discounts**.

The **Add <vendortype> discount** page now includes non-GDS vendors with a special highlight.

**Modify Air Contracts**

Airline discount for RandomVerbs.com

Please note: for vendors that are not available in your company's reservation system (GDS), this page can only be used to set a preference level for those vendors. Only GDS or TripLink discount codes should be entered on this page.

Vendor: Air Canada

Vendors not available in the GDS have this background color.  
Super chains have this background color.

Promo Code:

Discount Code:

☒ Company preferred carrier  
☐ Programmed Fare  
☐ ATPCO Passenger Type Code

TripLink Discount Code :

Vendor

Air Canada

Alaska Airlines  
American Airlines  
Amtrak  
Continental  
Delta  
Frontier  
JetBlue  
Southwest  
United  
US Airways  
Virgin America  
1time  
Aboriginal Air  
AccesRail  
Ada Air  
Adam Air  
ADC Airlines  
Adria Airways  
Aebal

## Standard Edition

The preferred status of non-GDS vendors is configured on the travel discount configuration page. This page is located:

Clients with Expense and TripLink:

In the *current* UI, click **Setup > Travel > Travel Discounts**.

- or -

In the *enhanced* UI, click **Administration > Setup > Travel > Travel Discounts**.

Clients with Travel, or Travel and Expense, with TripLink:

In the *current* UI, click **Setup > Travel > Discounts and Travel Content**.

- or -

In the *enhanced* UI, click **Administration > Setup > Travel > Discounts and Travel Content**.

The **Add Discount** page now includes non-GDS vendors with a special highlight.

**Add Discount**

**Airline Discount for Travel Config: Brooks Development 387 (US)**

Save Cancel

To add an airline discount, complete the fields below. You may also highlight a vendor even if you do not have a discount by choosing Company Preferred Vendor. Be sure to click Submit to save your changes.

Please note: for vendors that are not available in your company's reservation system (GDS), this page can only be used to set a preference level for those vendors. Only GDS or TripLink discount codes should be entered on this page.

Vendor

Air Canada

Vendors not available in the GDS have this background color.

Super chains have this background color.

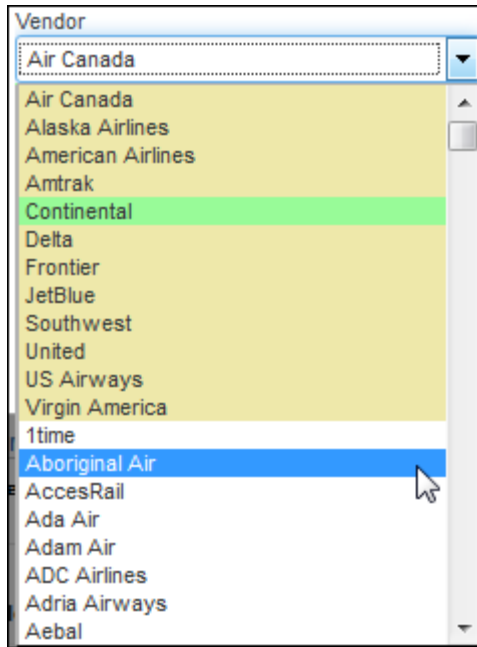
TripLink Discount Code ?

**Optional Information**

Preference ? Valid From Valid Until

Preferred





## Configuration/Feature Activation

The feature is automatically on; there are no additional configuration or activation steps.

## Supported Configurations

Monthly browser certifications, both current and planned, are available on the **Release Notes** page.

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#### Overview

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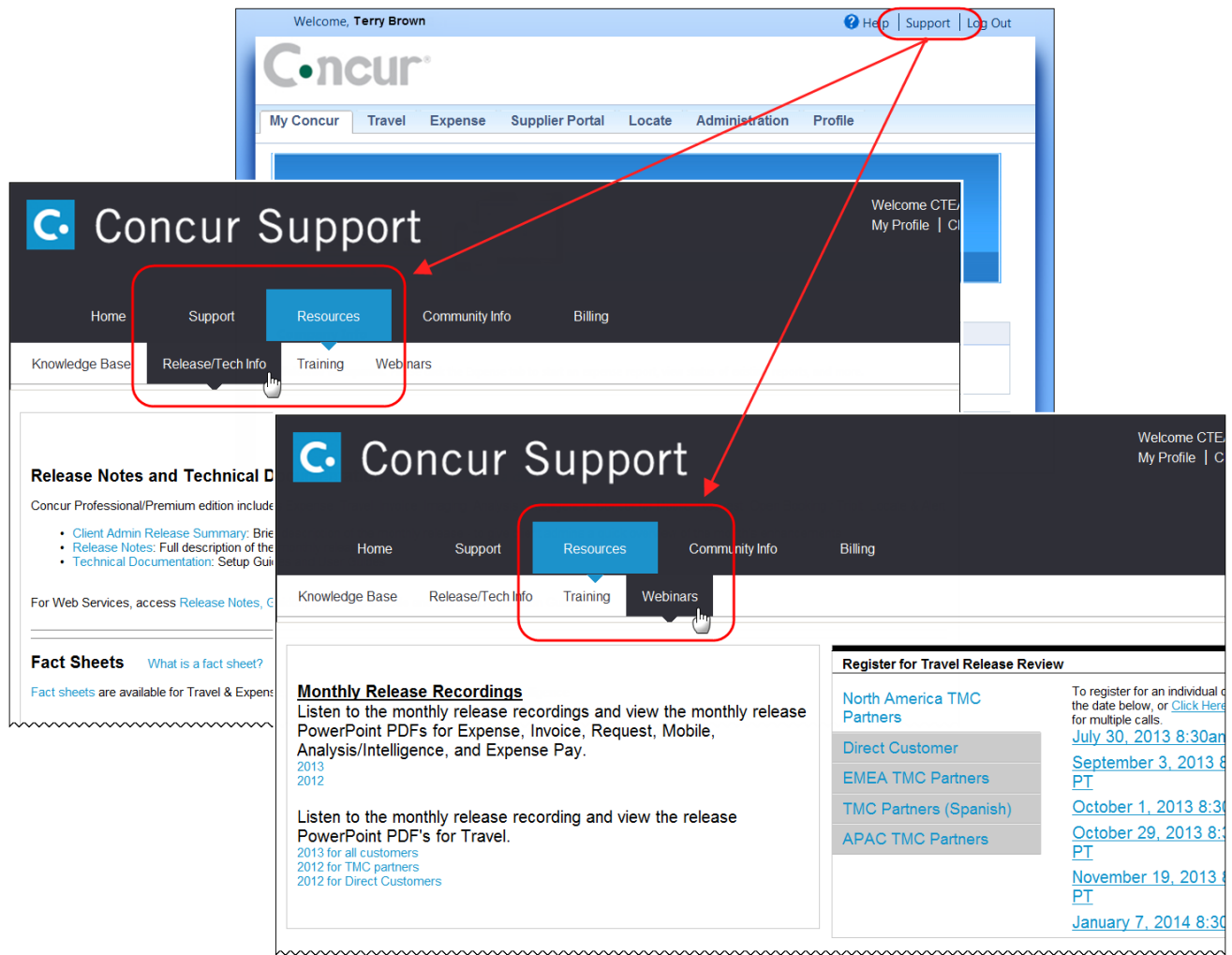
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- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



**NOTE:** If you use a user interface layout **other than** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

The screenshot shows the Concur Admin interface. At the top, a welcome message for Chris Collins is displayed. Below the navigation bar, the 'Help' menu is open, showing various help topics. A red circle highlights 'Expense Administration Help', which is linked to the 'Expense Administration - Feature Documentation' page. This page contains a 'Quick Links' section with links to release summaries, guides, and fact sheets. It also features a table of 'Expense Setup Guides' with columns for Name, Revised date, and Format. A red arrow points from the 'Expense Administration Help' menu item to the 'Expense Administration - Feature Documentation' page header.

**Expense Administration - Feature Documentation**

**Quick Links**

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit

**Expense Setup Guides**

Name	Revised	Format
Account Codes	Oct 19 2012	DOC - PDF
Allocations	Oct 19 2012	DOC - PDF
Attendees	June 14 2013	DOC - PDF
Audit Rules	Jul 1 2013	DOC - PDF
Audit Rules (Validation Rules)	Sep 23 2011	DOC - PDF
Authorization Requests (legacy Expense feature) - new clients, refer to Concur's Request service	Jun 22 2012	DOC - PDF

## Standard Edition

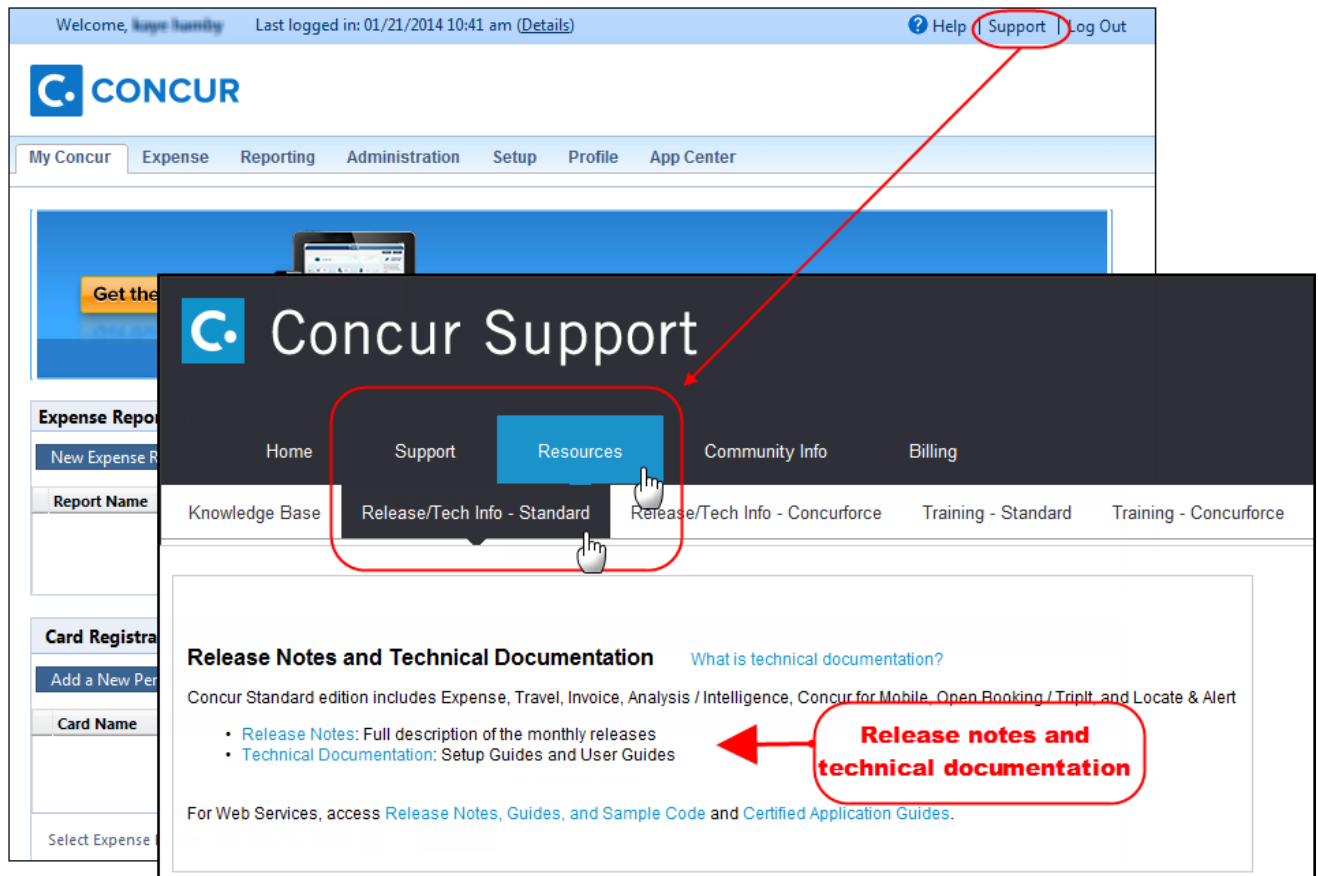
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You can access release notes and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur.

Click **Support**, and then, in the Concur Support Portal, click **Resources**.

Click **Release/Tech Info - Standard** for release notes, technical documents etc.



## Online Help – Admins

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**Expense Setup and Administration**

Help Search

**Technical Documentation**

- Setup and User Guide**
- What's New - Expense
- What's New - Concur's mobile app
- What's New - Concurforce

**Intuit Toolbar**

- Using Online Help**
- Setup**
  - Approval Routing
  - Car Configuration
  - Company Card
  - Com...
- Cost**
- Qu**
- Ot**
- Expe**
- Intro**
- Empl**
- File**

**Use Online Help**

**Navigate Help**

Use the Help **Back** and **Forward** buttons to go back and forth between topics. These buttons are located in the top right corner of the Help system. Do **not** use the browser's **Back** and **Forward** buttons.

**Change the size of the left and right frames**

You can make the Contents (left) side of the page wider or narrower. To do so:

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### Concur Standard Guides

Guide Name	Available Formats
<b>Expense Setup Guide</b> - Covers the Expense Setup wizard.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Administration User Guide</b> - Covers the Process Reports, Payment Manager, and Reporting features.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Expense Pay Guide</b> - Covers setup and administration of the Expense Pay product.	<a href="#">DOC</a> - <a href="#">PDF</a>

**NOTE:** These documents are provided in English only.

<p><b>Concur Release Notes</b></p> <p><b>TripLink</b></p>	
<b>Month</b>	<b>Audience</b>
<p>November 2014</p> <p>Update #1: Wednesday, December 3, 10:30 AM PT</p>	<p>Concur Clients FINAL</p>

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# Two User Interfaces – Enhanced UI

In October, the transition from the *current* user interface to the *enhanced* user interface will begin.

The image displays two versions of the Concur user interface side-by-side. The 'Current user interface' (left) features a top navigation bar with links like 'My Concur', 'Request', 'Travel', 'Expense', etc. Below this is a 'Trip Search' section with fields for departure/arrival cities, dates, and times. A 'Travel Alerts' section is also present. The 'Enhanced user interface' (right) has a more modern layout with a dark header bar, a 'Hello, Chris' greeting, and a dashboard with various metrics (e.g., 01 New Requests, 00 Purchase Requests, 01 Payment Requests, 21 Available Expenses, 04 Open Reports). It includes sections for 'TRIP SEARCH', 'ALERTS', 'COMPANY NOTES', 'MY TASKS' (with a '03 Required Approvals' task), and 'MY TRIPS (1)' (showing a trip from Seattle to Dallas). The footer of the enhanced interface includes the Concur logo and links to 'Company Policy' and 'Travel Policy'.

**Current user interface**

**Enhanced user interface**

As described previously in the monthly release notes, the enhanced UI brings some long-awaited usability enhancements – some are significant (perhaps involving navigation changes) while others are minor (involving only look-and-feel).

## Quick Look

Take a quick look at the enhanced UI:

<https://www.concur.com/en-us/introducing-concur-user-experience-updates>

## Getting Ready – Transition Guides

Two guides are available to help you and your users understand the enhancements. The "highlights" guide (about 13 pages) is designed for end users and describes the most significant changes that impact them. The "comprehensive" guide (about 70 pages) is designed for admins. It describes:

- The steps required **before** transitioning to the enhanced UI
- The preview period for the admin, for selected users, for selected groups, and for the entire company
- All of the enhancements – both significant and minor

To help with your training needs, you can provide the guides to your admins and/or end users "as is" – or you use any or all of either guide to create your own training materials – or you can cut, copy, paste, delete or otherwise edit either guide at will.

### Professional Edition:

Access the guides here:

[http://www.concurtraining.com/customers/tech\\_pubs/GW/TransGuidesProf.htm](http://www.concurtraining.com/customers/tech_pubs/GW/TransGuidesProf.htm)

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## Release Notes – Sample Screens and Menu Navigation

For screen samples, the monthly release notes may show the *current* UI, the *enhanced* UI, or both. Over time, all screen samples will appear only in the *enhanced* UI.

In those cases where the menu navigation is different, we will provide both sets of steps. Example:

1. In the *current* UI, click **Profile > Other Settings** (left menu).  
– or –  
In the *enhanced* UI, click **Profile > Profile Settings > Other Settings** (left menu).

# Release Notes

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## Travel Points: Points Awarded Only for Recent Trips

### Overview

Concur has updated the logic for Travel Points to check the dates of travel at the time the user sends a trip to TripLink. It was possible for a user to book a flight or hotel then forward the confirmation email on a delayed basis to increase their amount of travel points or to bypass controls like the TripLink travel rules. In the November 2014 release, if the incoming reservation is received after the start date of travel, the user will not receive travel points on that reservation.

#### **BUSINESS PURPOSE/CLIENT BENEFIT**

This enhancement ensures that Travel Points are awarded in conjunction with the other goals of TripLink: Client visibility into spend prior to the trip, rules applied to bookings prior to travel, and enhanced duty of care as a result of traveler location awareness. Secondly this enhancement also prevents possible Travel Point fraud that may come from a user waiting until Price-to-Beat targets for a given city are increased.

### Configuration/Feature Activation

The feature is available to TripLink clients with Travel Points activated.

## Coming Soon: TripLink App for Airbnb

### Overview

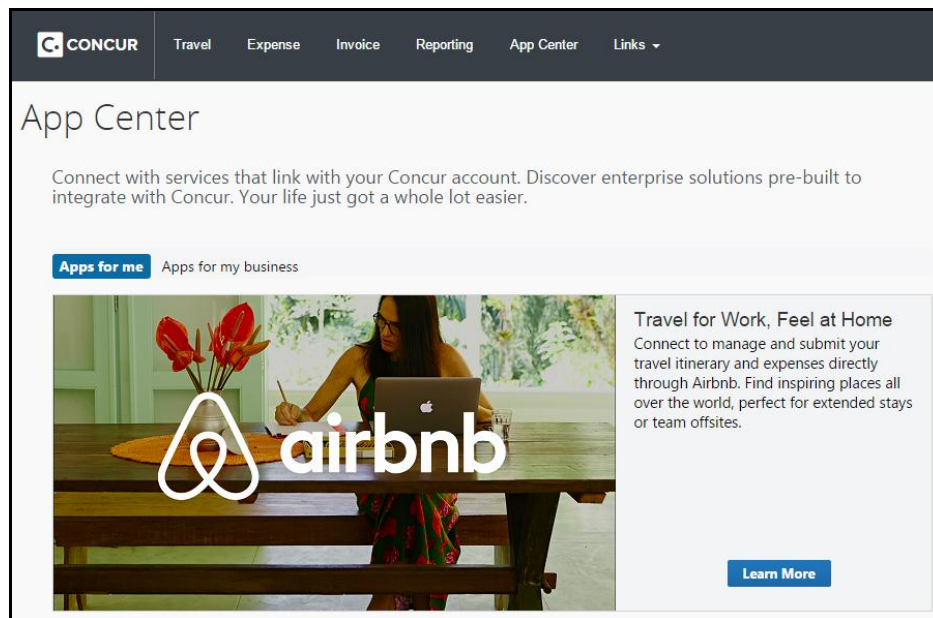
Concur will soon release a new TripLink application for Airbnb customers. This application allows users to connect their Concur account with Airbnb. After connecting their accounts, the users can make reservations on [www.airbnb.com](http://www.airbnb.com) and [www.airbnb.com/business-travel](http://www.airbnb.com/business-travel), and Airbnb will post the bookings made on their site to the user's Concur account. Also, the traveler will benefit from Airbnb e-receipts.

#### **BUSINESS PURPOSE / CLIENT BENEFIT**

This application allows users to book directly on Airbnb sites, and automatically brings bookings into Concur TripLink without a need to email to [plans@tripit.com](mailto:plans@tripit.com) or [plans@concur.com](mailto:plans@concur.com), providing immediate visibility into traveler spend and monitoring for policy rules, if applicable. This application delivers further traveler flexibility through the delivery of an e-receipt for each booking.


## What the User Sees

The user sees the Airbnb application on the **App Center** page.




The user clicks **Learn More** to view the application details.

The user accepts the Access Authorization, then clicks **Connect** to link their Concur account with Airbnb.

 [Travel](#) [Expense](#) [Invoice](#) [Reporting](#) [App Center](#) [Links](#) ▾

## App Center

[← Back to Apps](#)




### Travel for Work, Feel at Home

Find unique places to stay from local hosts all over the world.

#### Travel for Work, Feel at Home

Manage and submit your travel itinerary and expenses directly through Airbnb. With over 800,000 listings worldwide, find a space that makes after-work feel like vacation, with more space, a gourmet kitchen for cooking with colleagues, comfortable meeting spaces for off-sites, or a homier neighborhood feel for extended stays.

- Discover thousands of inspiring places to call home during your next work trip
- Easily search by location, type of space, and the amenities each host offers
- Book! Your itinerary and receipts will be sent automatically to your Concur account



#### Connect to

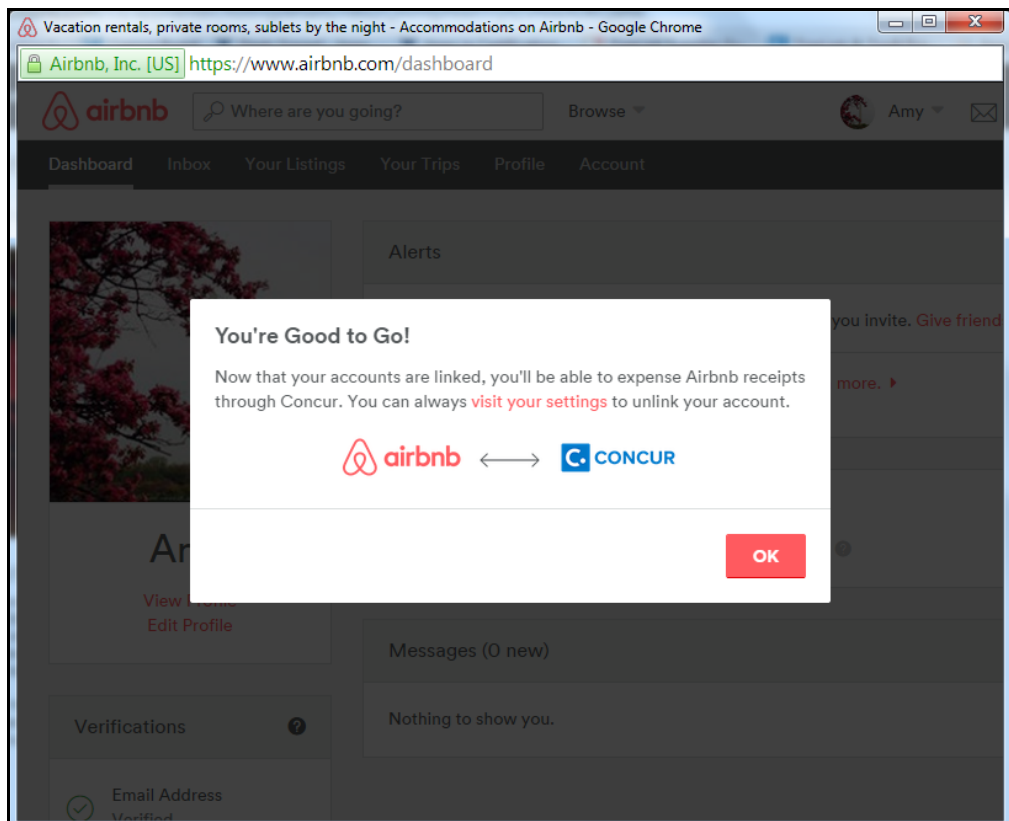
☒ I have read and agree to the [Access Authorization](#)

[Connect](#)

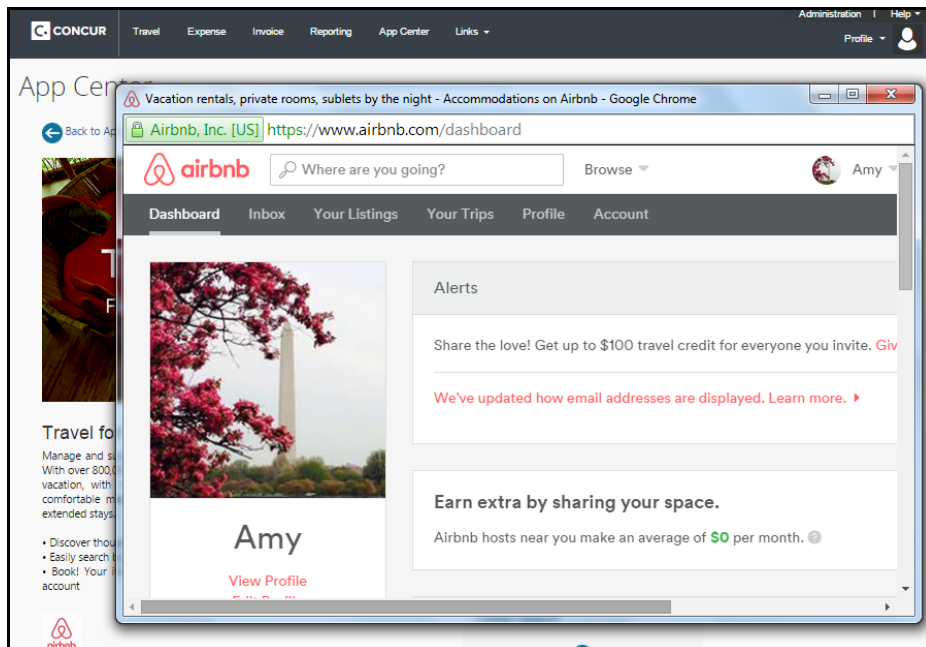
#### Resources

[Learn More](#)  
[Watch a Demo](#)  
[Contact Support](#)

The user gets the following pop-up to show that they are **Connected**:




When the user clicks **OK** they are taken to their Airbnb dashboard:






When the user closes the Airbnb pop-up, they are returned to the Airbnb App Center listing, where they now show as Connected.

 **CONCUR**

TravelExpenseInvoiceReportingApp CenterLinks ▾

App Center

[← Back to Apps](#)




## Travel for Work, Feel at Home


Find unique places to stay from local hosts all over the world.

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 **Connected to**


Disconnect

Resources

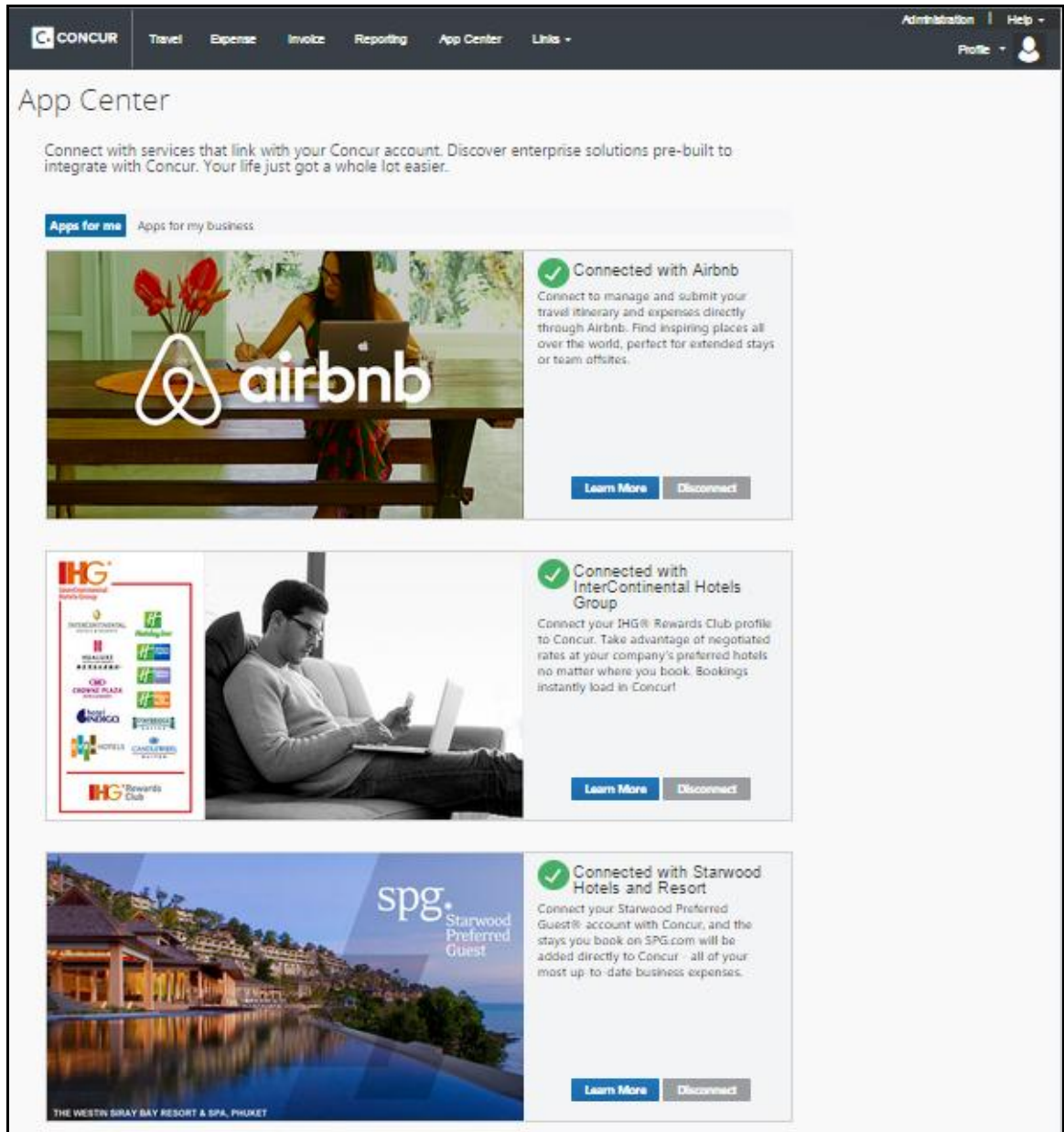
[Learn More](#)

[Watch a Demo](#)

[Contact Support](#)







## Configuration

This application is available in the App Center for all TriLink clients.

## Supported Configurations

Monthly browser certifications, both current and planned, are available on the **Release Notes** page.

## Internet Explorer 7 – To Be Discontinued

### Overview

Concur will be refreshing the web-based user interface to implement features and functionality that will provide clients with an enhanced experience for our solutions, while minimizing impact to their organizations and the change they need to manage. This refresh will help respond to feedback from our clients by:

- Enhancing the user's experience for all of Concur's products by modernizing the user interface
- Complying with [WCAG 2.0 AA](#) from the World Wide Web Consortium (W3C) and [Section 508 of the US Rehabilitation Act of 1973](#)
- Architecting the back-end technology to allow for the short-term changes and to better position Concur's products for changes in the future while reducing end-user impact

The first step in the process is to evolve the user experience with a focus on a redesigned interface and foundational changes in key areas of functionality. We will be delivering a redesigned, modern user interface for all products on <http://www.concursolutions.com>:

- Modern consumer based application look-and-feel that will be applied across all products
- Consistent terminology, iconography, and interaction across web and mobile applications
- Dashboard design with grouping of like functions and tasks and positioning key steps needed to complete a process at logical locations on the page

This refresh takes advantage of the most recent web browser technologies to provide users with a premium user experience. *As a result, IE 7 will no longer be a supported browser for users when they are transitioned to the new user interface; **for the best user experience, Concur recommends IE 10 or higher, as well as Google Chrome 30.0 or higher, and Mozilla Firefox 25.0 or higher.***

### What the User Sees

Users who log in to Concur with Internet Explorer 7 (IE7) will now see a banner at the top of every page that reads: *Support for this version of Internet Explorer (7) will be discontinued in Dec 2014. Please contact your Concur Administrator or IT Department to determine when and how to upgrade.*

Users can click **Close** on any page to get more space, but it will appear again on every subsequent page.



### ***Configuration / Feature Activation***

The feature is automatically on; there are no additional configuration or activation steps.

### **Monthly Browser Certifications**

Monthly browser certifications, both current and planned, are available with the other Concur monthly release notes.

Refer to *Additional Release Notes and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

# Additional Release Notes and Technical Documentation

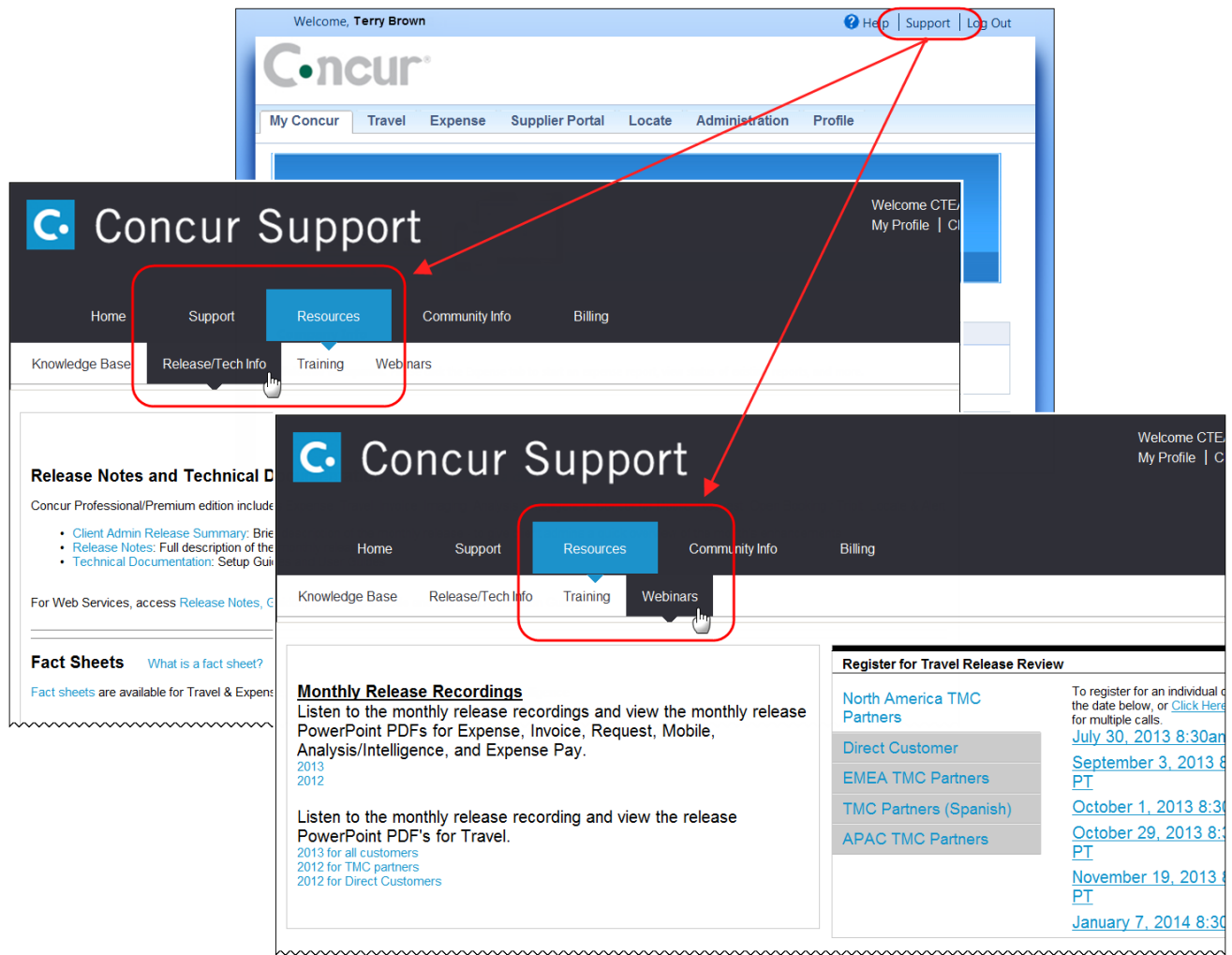
## Professional Edition

### Concur Support Portal

Access release notes, webinars, and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur. Click **Support** and then – in the Concur Support portal – click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



**NOTE:** If you use a user interface layout **other than** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

The screenshot shows the Concur Admin interface. At the top, a welcome message for Chris Collins is displayed. Below the navigation bar, the 'Help' menu is open, showing various help topics. A red circle highlights the 'Expense Administration Help' link, which is being clicked by a mouse cursor. Below the menu, the 'Expense Administration - Feature Documentation' page is shown. It includes a 'Quick Links' section with links to release summaries, notes, and fact sheets. A 'Expense Setup Guides' table lists various guides with their revision dates and formats. A red arrow points from the 'Expense Administration Help' link in the menu to the 'Expense Administration - Feature Documentation' page.

Welcome, Chris Collins [ You are administering for: Yourself ]

Help | Log Out

Training  
Travel Help  
Travel Administration Help  
Locate & Alert Help  
Expense Help  
Invoice Help  
Expense Tools Help  
Expense Administration Help  
Invoice Administration Help  
Request Help  
Request Administration Help  
Budget Admin Help

**Expense Administration - Feature Documentation**

Quick Links

Client Admin Release Summary - **What's New**  
Client Release Notes - All Products  
Client Fact Sheets  
Concur Training Toolkit

Setup Guides (below)  
User Guides (below)  
Import / Extract Specifications (below)

These documents are provided in English only  
Permission to Duplicate / Permission to Copy / Proprietary Statement

Expense Setup Guides

Name	Revised	Format
Account Codes	Oct 19 2012	DOC - PDF
Allocations	Oct 19 2012	DOC - PDF
Attendees	June 14 2013	DOC - PDF
Audit Rules	Jul 1 2013	DOC - PDF
Audit Rules (Validation Rules)	Sep 23 2011	DOC - PDF
Authorization Requests (legacy Expense feature) - new clients, refer to Concur's Request service	Jun 22 2012	DOC - PDF

Report Date Requested Amount

06/28/2013	GBP 25.00
06/23/2013	\$2,401.34

## Standard Edition

### Concur Support Portal

You can access release notes and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur.

Click **Support**, and then, in the Concur Support Portal, click **Resources**.

Click **Release/Tech Info - Standard** for release notes, technical documents etc.

The screenshot shows the Concur Support page. At the top, there is a navigation bar with 'Help', 'Support', and 'Log Out' links. Below this is a secondary navigation bar with 'Home', 'Support', 'Resources', 'Community Info', and 'Billing'. The 'Resources' link is highlighted with a red box, and a red arrow points from the 'Support' link in the top bar to it. Below the secondary navigation bar, there is a third navigation bar with 'Knowledge Base', 'Release/Tech Info - Standard', 'Release/Tech Info - Concurforce', 'Training - Standard', and 'Training - Concurforce'. The 'Release/Tech Info - Standard' link is highlighted with a red box, and a red arrow points from the 'Resources' link in the secondary bar to it. Below this, the 'Release Notes and Technical Documentation' section is displayed. It includes a link 'What is technical documentation?' and a list of items: 'Release Notes: Full description of the monthly releases' and 'Technical Documentation: Setup Guides and User Guides'. A red arrow points from a red box containing the text 'Release notes and technical documentation' to the 'Release Notes' item in the list. Below the list, there is a paragraph: 'For Web Services, access Release Notes, Guides, and Sample Code and Certified Application Guides.'

Welcome, [kaye.harding](#) Last logged in: 01/21/2014 10:41 am ([Details](#)) [Help](#) [Support](#) [Log Out](#)

**CONCUR**

My Concur Expense Reporting Administration Setup Profile App Center

Get the

**Concur Support**

Home Support **Resources** Community Info Billing

Knowledge Base **Release/Tech Info - Standard** Release/Tech Info - Concurforce Training - Standard Training - Concurforce

**Release Notes and Technical Documentation** [What is technical documentation?](#)

Concur Standard edition includes Expense, Travel, Invoice, Analysis / Intelligence, Concur for Mobile, Open Booking / Triplt, and Locate & Alert

- [Release Notes](#): Full description of the monthly releases
- [Technical Documentation](#): Setup Guides and User Guides

For Web Services, access [Release Notes](#), [Guides](#), and [Sample Code](#) and [Certified Application Guides](#).

**Release notes and technical documentation**

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**Expense Setup and Administration**

Help Search

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Concur Release Notes	
TripLink	
Month	Audience
December 2014 Initial post: Thursday, December 11, 12:30 PM PT	Concur Clients FINAL

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# Two User Interfaces – Enhanced UI

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As described previously in the monthly release notes, the enhanced UI brings some long-awaited usability enhancements – some are significant (perhaps involving navigation changes) while others are minor (involving only look-and-feel).

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Take a quick look at the enhanced UI:

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For screen samples, the monthly release notes may show the *current* UI, the *enhanced* UI, or both. Over time, all screen samples will appear only in the *enhanced* UI.

In those cases where the menu navigation is different, we will provide both sets of steps. Example:

1. In the *current* UI, click **Profile > Other Settings** (left menu).  
– or –  
In the *enhanced* UI, click **Profile > Profile Settings > Other Settings** (left menu).

# Release Notes

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## TripLink App for Airbnb Is Now Available

### Overview

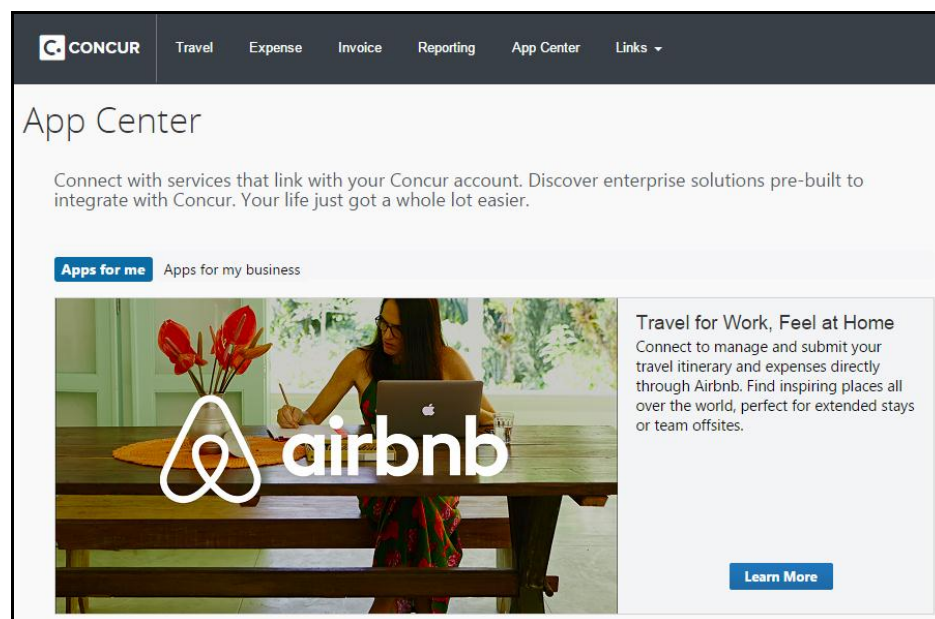
Concur has released a new TripLink application for Airbnb customers. This application allows users to connect their Concur account with Airbnb. After connecting their accounts, the users can make reservations on [www.airbnb.com](http://www.airbnb.com) and [www.airbnb.com/business-travel](http://www.airbnb.com/business-travel), and Airbnb will post the bookings made on their site to the user's Concur account. Also, the traveler will benefit from Airbnb e-receipts.

### BUSINESS PURPOSE / CLIENT BENEFIT

This application allows users to book directly on Airbnb sites, and automatically brings bookings into Concur TripLink without a need to email to [plans@tripit.com](mailto:plans@tripit.com) or [plans@concur.com](mailto:plans@concur.com), providing immediate visibility into traveler spend and monitoring for policy rules, if applicable. This application delivers further traveler flexibility through the delivery of an e-receipt for each booking.


### What the User Sees

The user sees the Airbnb application on the **App Center** page.




The user clicks **Learn More** to view the application details.

The user accepts the Access Authorization, then clicks **Connect** to link their Concur account with Airbnb.

 [Travel](#) [Expense](#) [Invoice](#) [Reporting](#) [App Center](#) [Links](#) ▾

## App Center

[← Back to Apps](#)




### Travel for Work, Feel at Home

Find unique places to stay from local hosts all over the world.

#### Travel for Work, Feel at Home

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- Discover thousands of inspiring places to call home during your next work trip
- Easily search by location, type of space, and the amenities each host offers
- Book! Your itinerary and receipts will be sent automatically to your Concur account



#### Connect to

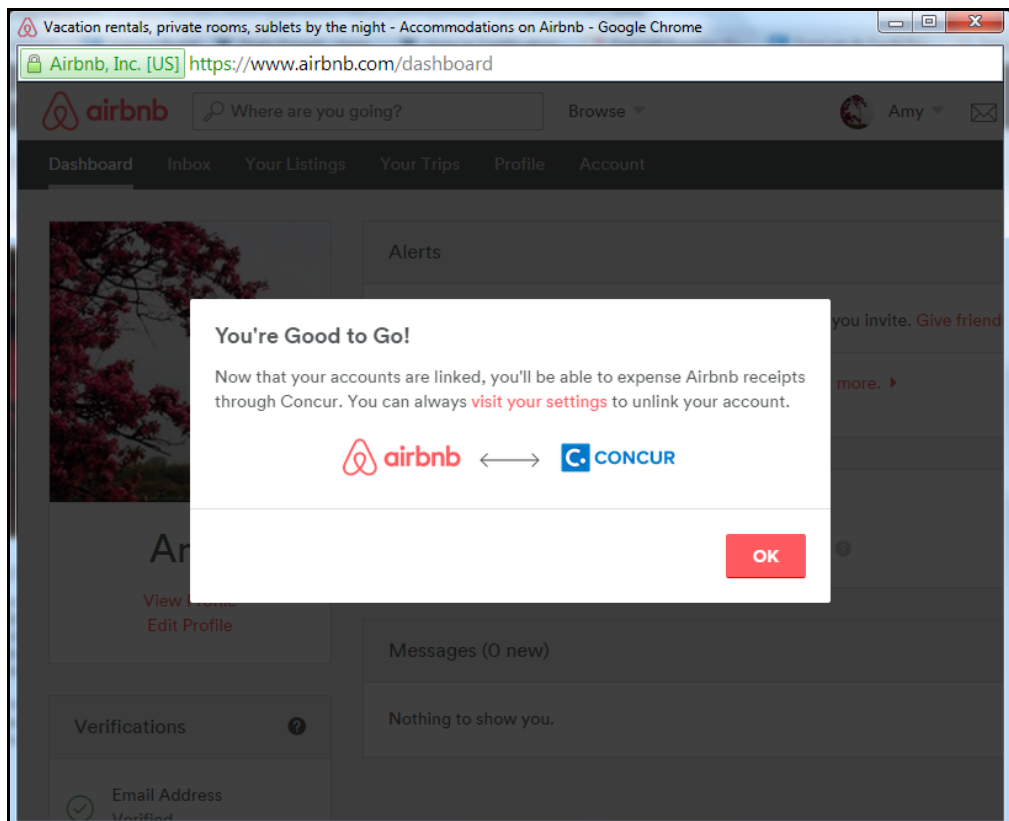
☒ I have read and agree to the [Access Authorization](#)

[Connect](#)

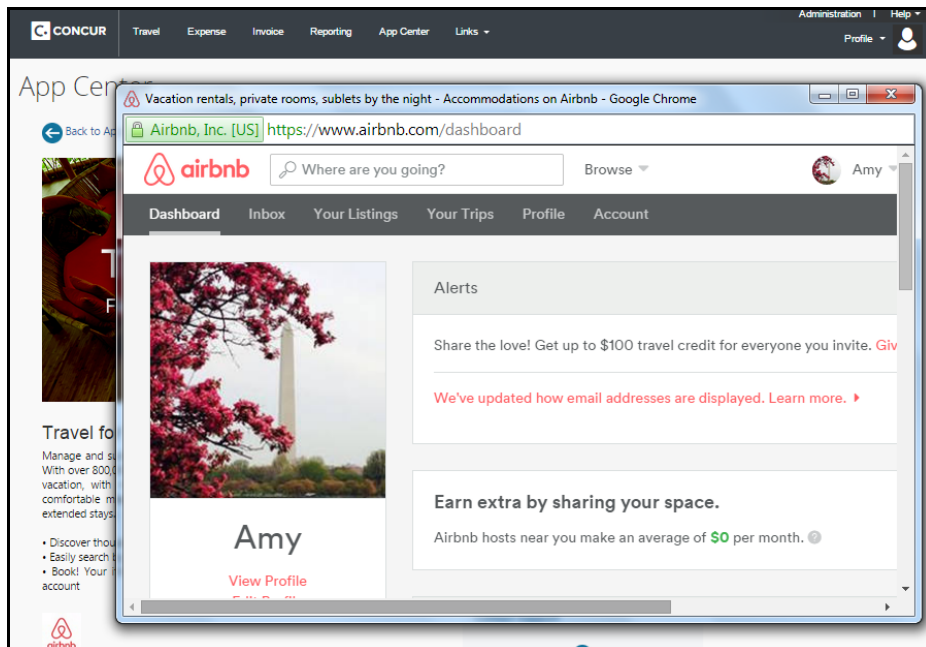
#### Resources

[Learn More](#)  
[Watch a Demo](#)  
[Contact Support](#)

The user gets the following pop-up to show that they are **Connected**:





When the user clicks **OK** they are taken to their Airbnb dashboard:







When the user closes the Airbnb pop-up, they are returned to the Airbnb App Center listing, where they now show as Connected.

 [Travel](#) [Expense](#) [Invoice](#) [Reporting](#) [App Center](#) [Links](#) 

## App Center

 [Back to Apps](#)




### Travel for Work, Feel at Home


Find unique places to stay from local hosts all over the world.

#### Travel for Work, Feel at Home

Manage and submit your travel itinerary and expenses directly through Airbnb. With over 800,000 listings worldwide, find a space that makes after-work feel like vacation, with more space, a gourmet kitchen for cooking with colleagues, comfortable meeting spaces for off-sites, or a homier neighborhood feel for extended stays.

- Discover thousands of inspiring places to call home during your next work trip
- Easily search by location, type of space, and the amenities each host offers
- Book! Your itinerary and receipts will be sent automatically to your Concur account




 **Connected to**

[Disconnect](#)

#### Resources

[Learn More](#)  
[Watch a Demo](#)  
[Contact Support](#)



Concur Release Notes

Page 7

TripLink

December 2014

Initial post: Thursday, December 11, 12:30 PM PT

Concur Clients FINAL

CONCUR

[Travel](#)
[Expense](#)
[Invoice](#)
[Reporting](#)
[App Center](#)
[Links](#)

[Administration](#)
[Help](#)

[Profile](#)

## App Center

Connect with services that link with your Concur account. Discover enterprise solutions pre-built to integrate with Concur. Your life just got a whole lot easier.

Apps for me

Apps for my business

**Connected with Airbnb**

Connect to manage and submit your travel itinerary and expenses directly through Airbnb. Find inspiring places all over the world, perfect for extended stays or team offsites.

[Learn More](#)
[Disconnect](#)

**Connected with InterContinental Hotels Group**

Connect your IHG® Rewards Club profile to Concur. Take advantage of negotiated rates at your company's preferred hotels no matter where you book. Bookings instantly load in Concur!

[Learn More](#)
[Disconnect](#)

**Connected with Starwood Hotels and Resort**

Connect your Starwood Preferred Guest® account with Concur, and the stays you book on SPG.com will be added directly to Concur - all of your most up-to-date business expenses.

[Learn More](#)
[Disconnect](#)

## Configuration

This application is available in the App Center for all TripLink clients.



## Supported Configurations

Monthly browser certifications, both current and planned, are available on the **Release Notes** page.

### Internet Explorer 7 – To Be Discontinued

#### Overview

Concur will be refreshing the web-based user interface to implement features and functionality that will provide clients with an enhanced experience for our solutions, while minimizing impact to their organizations and the change they need to manage. This refresh will help respond to feedback from our clients by:

- Enhancing the user's experience for all of Concur's products by modernizing the user interface
- Complying with [WCAG 2.0 AA](#) from the World Wide Web Consortium (W3C) and [Section 508 of the US Rehabilitation Act of 1973](#)
- Architecting the back-end technology to allow for the short-term changes and to better position Concur's products for changes in the future while reducing end-user impact

The first step in the process is to evolve the user experience with a focus on a redesigned interface and foundational changes in key areas of functionality. We will be delivering a redesigned, modern user interface for all products on <http://www.concursolutions.com>:

- Modern consumer based application look-and-feel that will be applied across all products
- Consistent terminology, iconography, and interaction across web and mobile applications
- Dashboard design with grouping of like functions and tasks and positioning key steps needed to complete a process at logical locations on the page

This refresh takes advantage of the most recent web browser technologies to provide users with a premium user experience. *As a result, IE 7 will no longer be a supported browser for users when they are transitioned to the new user interface; **for the best user experience, Concur recommends IE 10 or higher, as well as Google Chrome 30.0 or higher, and Mozilla Firefox 25.0 or higher.***

#### What the User Sees

Users who log in to Concur with Internet Explorer 7 (IE7) will now see a banner at the top of every page that reads: *Support for this version of Internet Explorer (7) will be discontinued in Dec 2014. Please contact your Concur Administrator or IT Department to determine when and how to upgrade.*

Users can click **Close** on any page to get more space, but it will appear again on every subsequent page.



### ***Configuration / Feature Activation***

The feature is automatically on; there are no additional configuration or activation steps.

### **Monthly Browser Certifications**

Monthly browser certifications, both current and planned, are available with the other Concur monthly release notes.

Refer to *Additional Release Notes and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

# Additional Release Notes and Technical Documentation

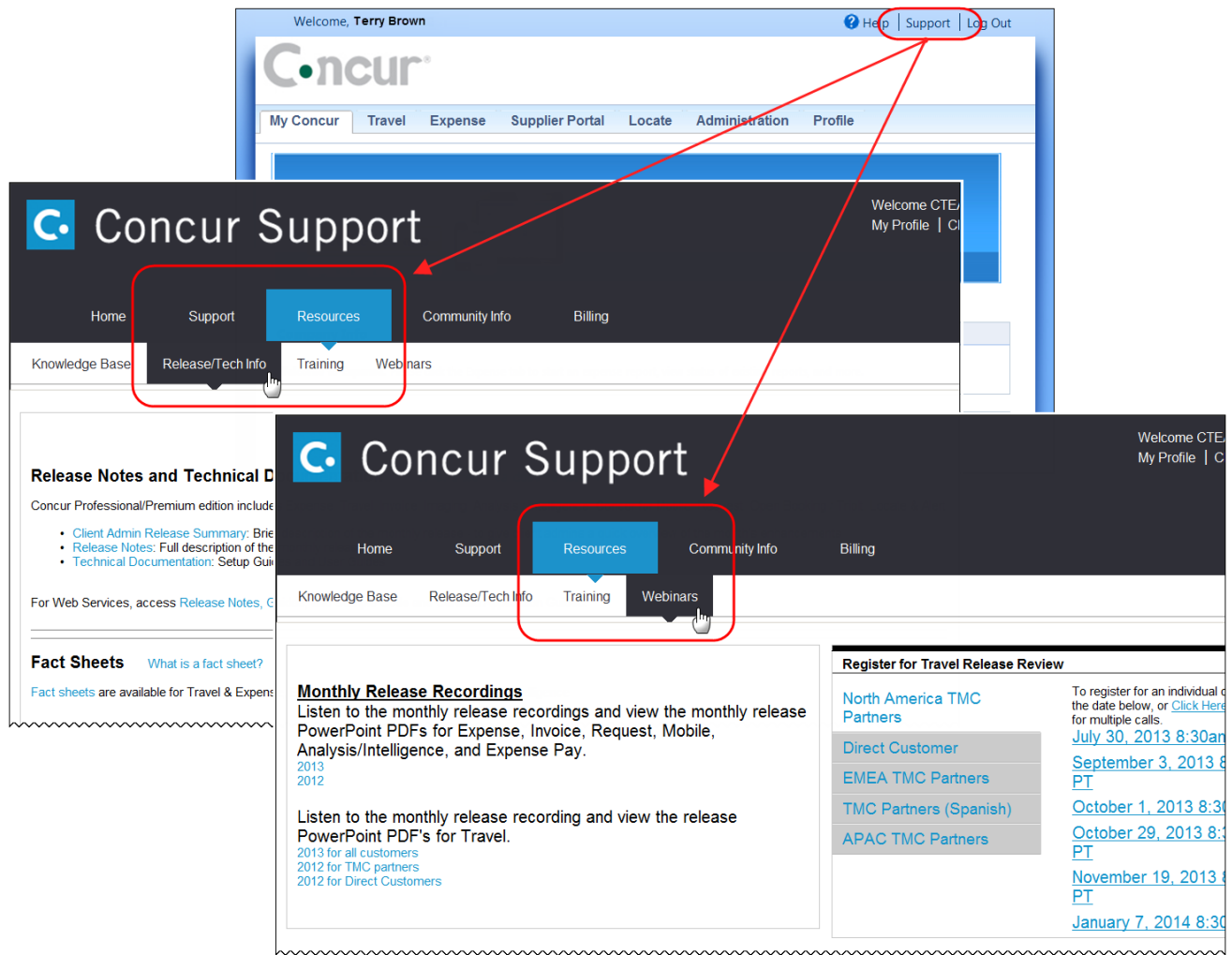
## Professional Edition

### Concur Support Portal

Access release notes, webinars, and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur. Click **Support** and then – in the Concur Support portal – click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



**NOTE:** If you use a user interface layout **other than** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

Welcome, Chris Collins [ You are administering for: Yourself ]

Help | Log Out

Training  
Travel Help  
Travel Administration Help  
Locate & Alert Help  
Expense Help  
Invoice Help  
Expense Tools Help  
**Expense Administration Help**  
Invoice Administration Help  
Request Help  
Request Administration Help  
Budget Admin Help

### Expense Administration - Feature Documentation

Quick Links

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit

Setup Guides (below)

- User Guides (below)
- Import / Extract Specifications (below)

These documents are provided in English only

Permission to Duplicate / Permission to Copy / Proprietary Statement

#### Expense Setup Guides

Name	Revised	Format
Account Codes	Oct 19 2012	DOC - PDF
Allocations	Oct 19 2012	DOC - PDF
Attendees	June 14 2013	DOC - PDF
Audit Rules	Jul 1 2013	DOC - PDF
Audit Rules (Validation Rules)	Sep 23 2011	DOC - PDF
Authorization Requests (legacy Expense feature) - new clients, refer to Concur's Request service	Jun 22 2012	DOC - PDF

日本語

Report Date Requested Amount

06/28/2013	GBP 25.00
06/23/2013	\$2,401.34

## Standard Edition

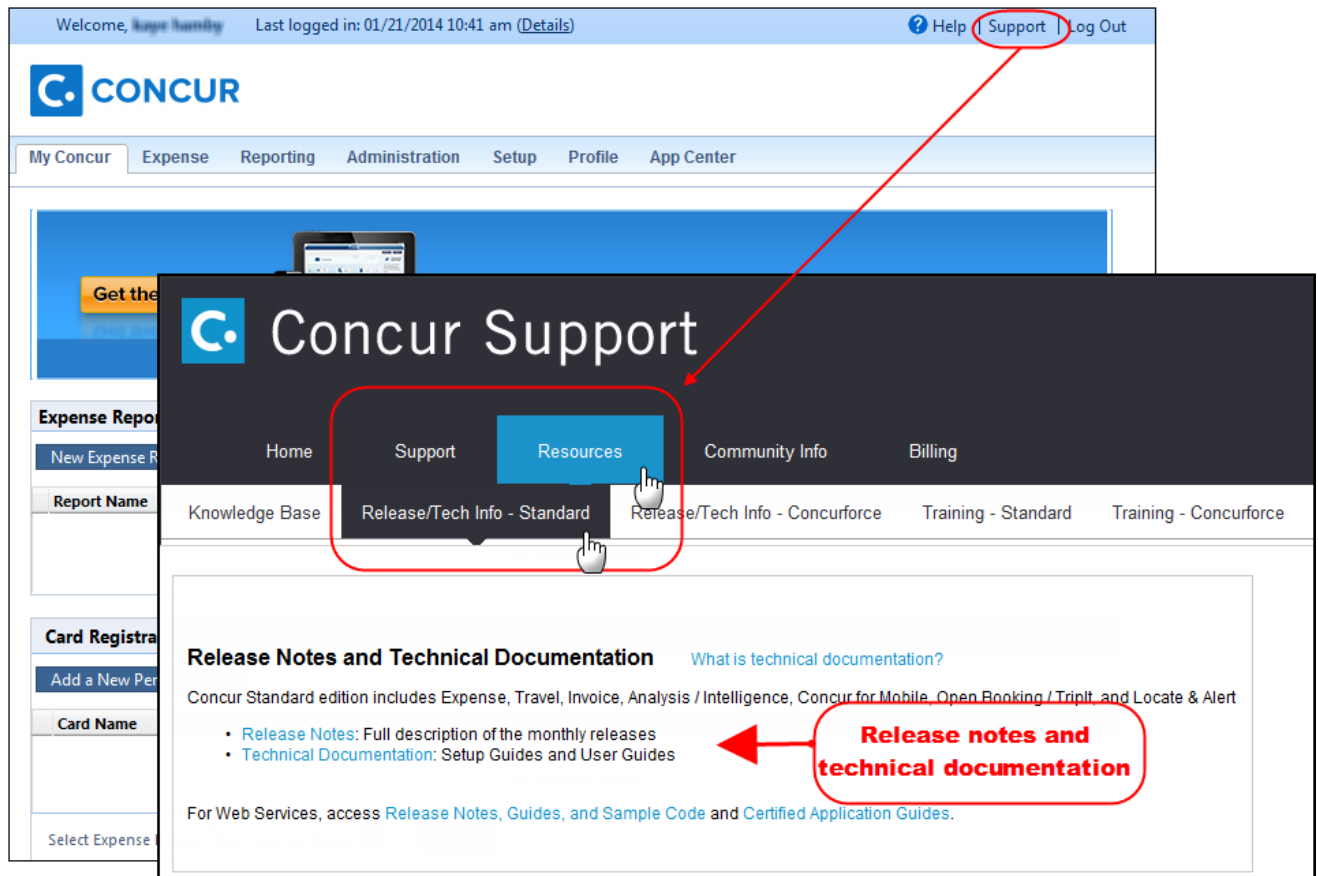
### Concur Support Portal

You can access release notes and other technical documentation on the Concur Support Portal.

If you have the proper permissions, the **Support** menu is available to you in Concur.

Click **Support**, and then, in the Concur Support Portal, click **Resources**.

Click **Release/Tech Info - Standard** for release notes, technical documents etc.



## Online Help – Admins

Users with an admin role can access release notes, technical documents, and other resources using online help in Concur.

**Expense Setup and Administration**

Help Search

**Technical Documentation**

- Setup and User Guide**
- What's New - Expense
- What's New - Concur's mobile app
- What's New - Concurforce

**Intuit Toolbar**

- Using Online Help**
- Setup**
  - Approval Routing
  - Car Configuration
  - Company Card
  - Com...
- Cost**
- Qu**
- Ot**
- Expe**
- Intro**
- Empl**
- File**

**Use Online Help**

**Navigate Help**

Use the Help **Back** and **Forward** buttons to go back and forth between topics. These buttons are located in the top right corner of the Help system. Do **not** use the browser's **Back** and **Forward** buttons.

**Change the size of the left and right frames**

You can make the Contents (left) side of the page wider or narrower. To do so:

1. Place the mouse pointer on the gray bar that separates the left (Contents) and right (Help page) frames.
2. Click and drag to the desired width.

**Concur Standard Guides**

Guide Name	Available Formats
<b>Expense Setup Guide</b> - Covers the Expense Setup wizard.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Administration User Guide</b> - Covers the Process Reports, Payment Manager, and Reporting features.	<a href="#">DOC</a> - <a href="#">PDF</a>
<b>Expense Pay Guide</b> - Covers setup and administration of the Expense Pay product.	<a href="#">DOC</a> - <a href="#">PDF</a>

**NOTE:** These documents are provided in English only.