Concur Release Notes **Expense Professional / Premium** *Includes:* Expense, Imaging, Expense Pay, Expense Report Auditing, Jobs	
Month	**Audience**
January 2014 Initial post: Friday, January 17, 1:45 PM PT	***CLIENT – FINAL***

Contents

Release Notes

Section 1: Expense

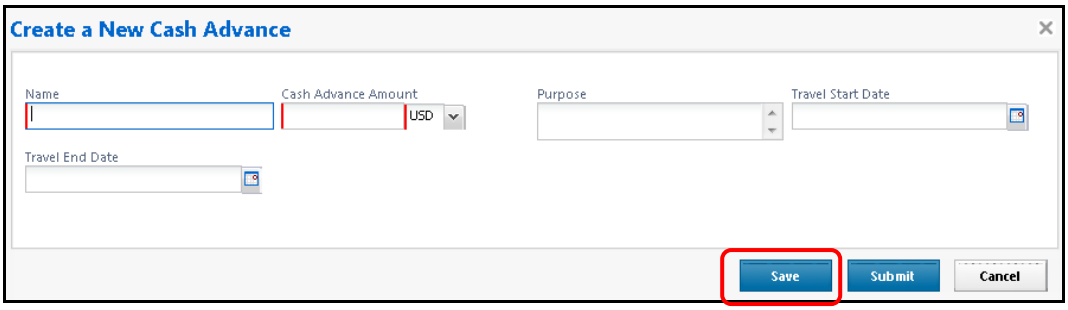
Cash Advance: Enhancements Now Available

Overview

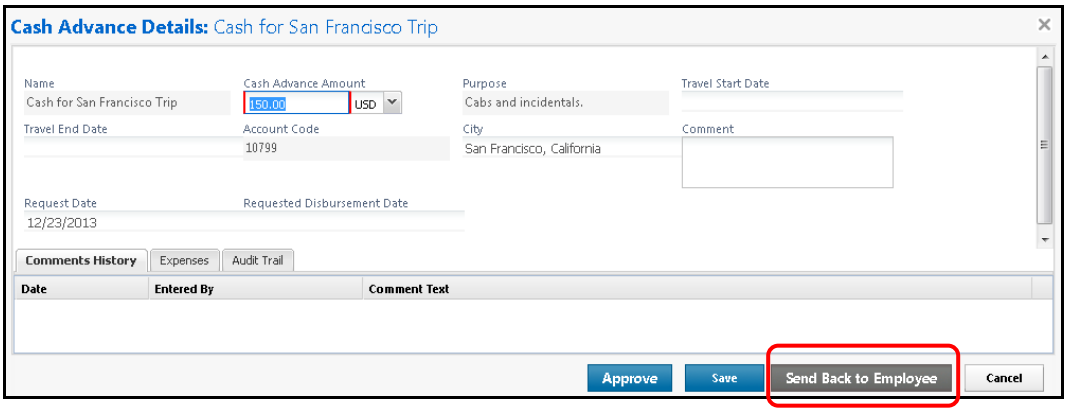
Concur has enhanced the cash advance feature to provide multiple usability and configuration enhancements. This release includes:

AUTOMATICALLY APPLIED UPDATES

- Usability enhancements within the expense report process:
  - A new prompt to link available cash advances during report creation
  - A running balance of linked advances within the report
- A new field (**Purpose**) added to the default cash advance form
- A **Save** button for unsubmitted advances



- A new **Send Back to Employee** approval button, with a new employee ability to resubmit



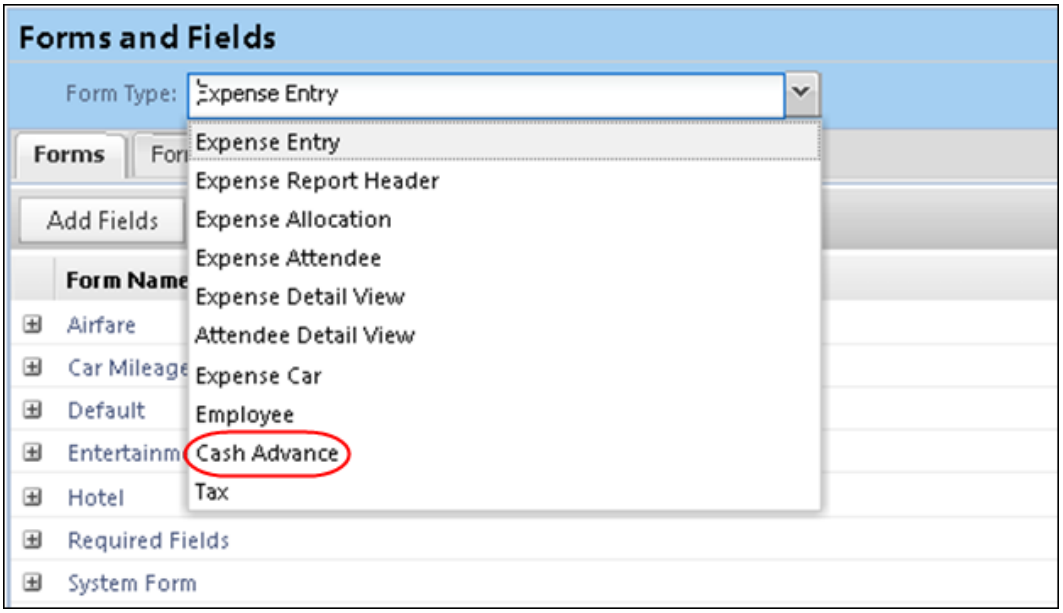
- The Cash Advance administrator can now issue cash advances to users in groups without the Cash Advance feature activated. The users can utilize the issued cash advance but cannot request additional ones.

- All users will see minor changes to the table layout for cash advance lists.

NEW CONFIGURATION OPTIONS

Forms and Fields:

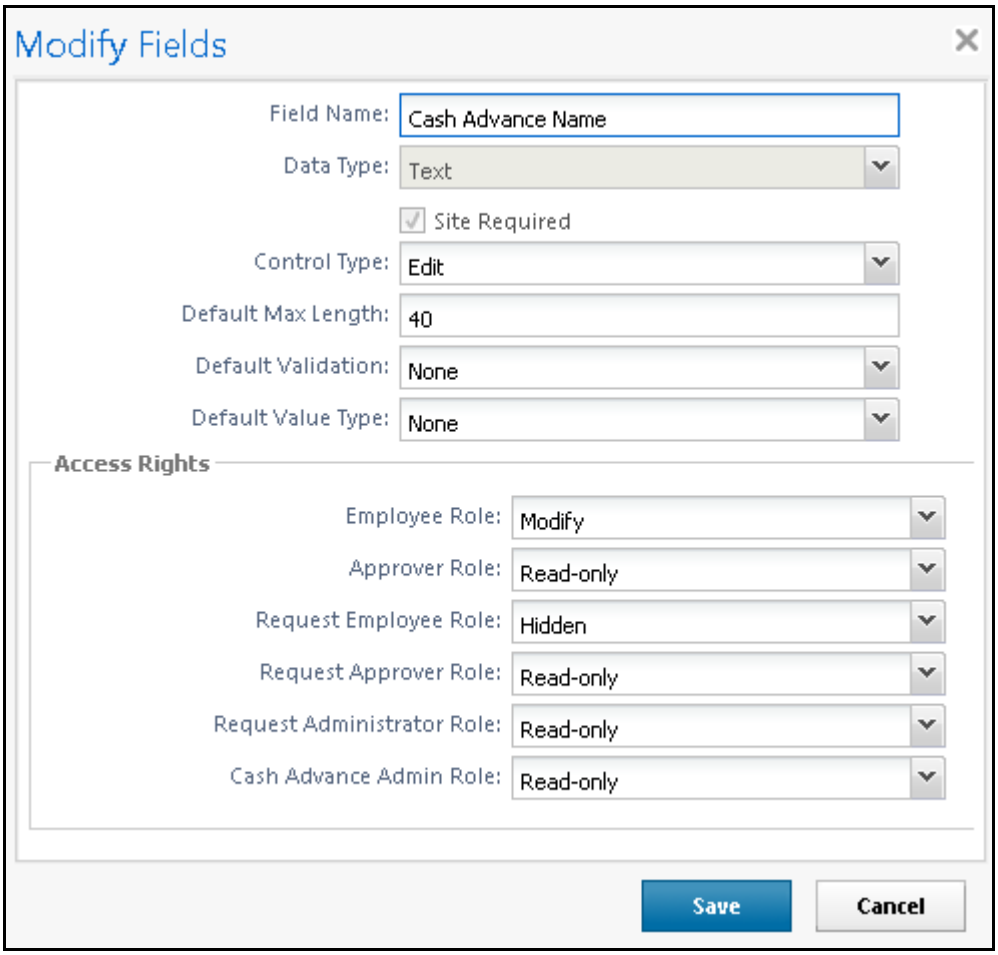
- A new Cash Advance form definition to change configured fields:



- New fields available to add to the form:
  - Purpose (added by default to all cash advance forms)
  - Travel Start Date
  - Travel End Date
  - Requested Disbursement Date
  - Location (city)

NOTE: The Cash Advance form does not support custom fields.

- New user role (Cash Advance Administrator) for the field-level access rights:



This new form definition can be used in both the Expense and Request products. The cash advance form definition supports setting role-based access for Expense and Request user roles.

Known Issue: Issuing a Cash Advance - Please Read

When the Cash Advance administrator chooses to Issue (instead of View) a cash advance, the new form configuration is not appearing. If the client has made changes to the cash advance form and wants the admin to utilize those fields before issuing the cash advance, the admin must take an additional step.

1. Select the cash advance that is pending issuance and click **View Details** to open the form and view the fields. The updated Cash Advance form fields will display.

2. Review and edit the form fields as required (and as available to the administrator with Modify rights).

3. Save the cash advance.

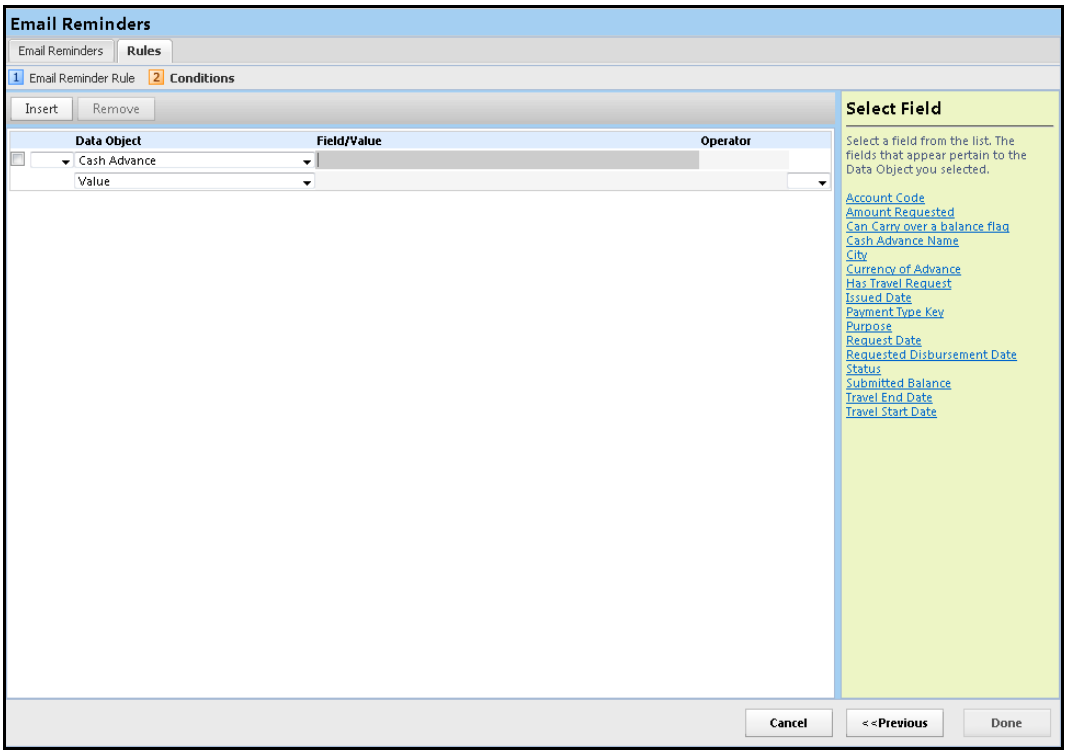
4. Select the saved cash advance pending issuance and click **Issue**.

The normal screens appear, permitting the administrator to view and change the exchange rate as needed, and to issue the advance. Once the advance is issued, the values on the form are locked from editing.

NOTE: A fix for this issue is scheduled in the February timeframe.

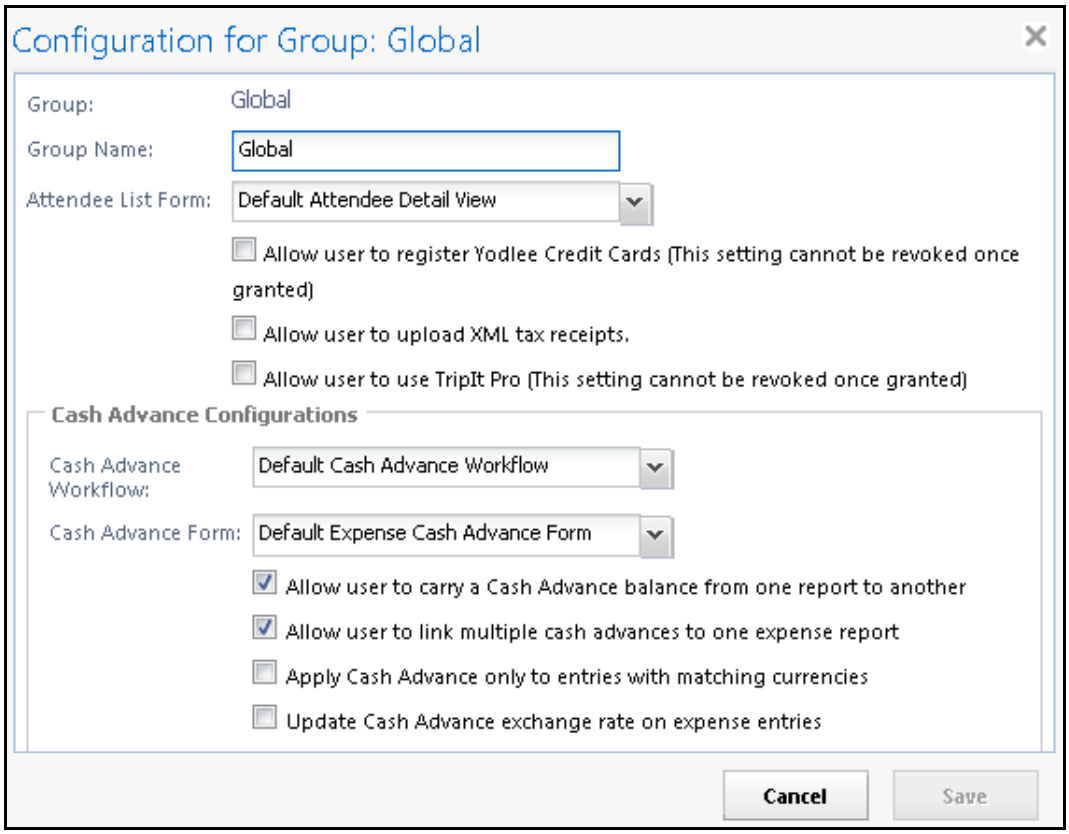
Email Reminders:

- New Cash Advance fields available for email reminder rules:



Group Configuration:

The cash advance configuration options have been consolidated into a new section. The cash advance form is specified on the **Configuration for Group** page:

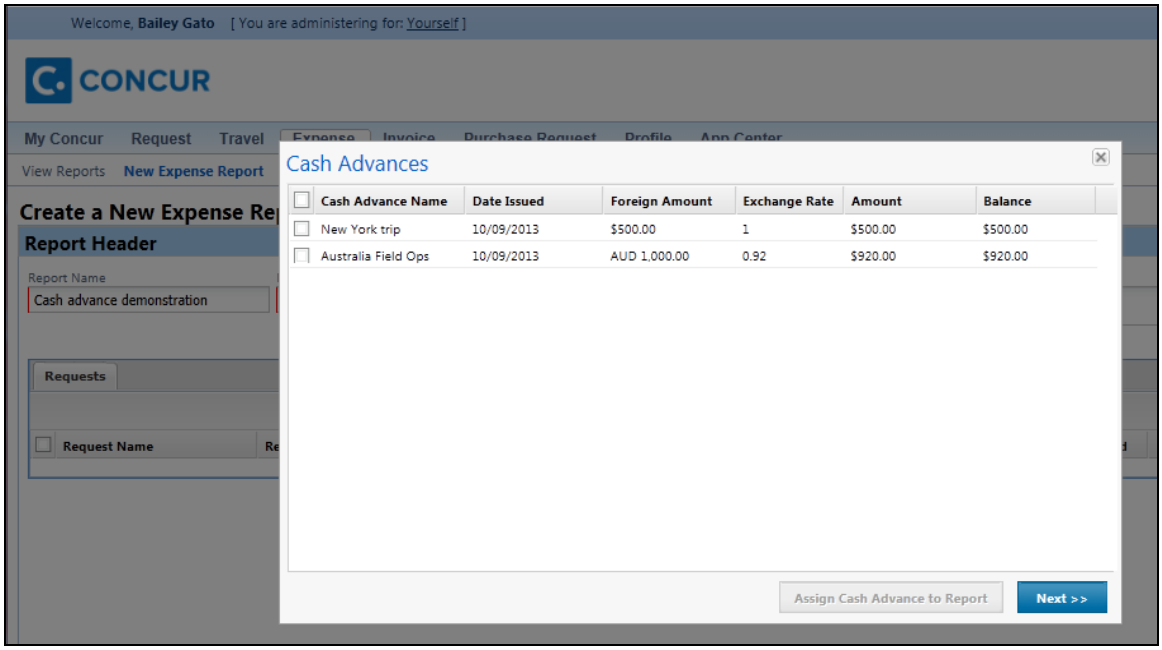


BUSINESS PURPOSE / CLIENT BENEFIT

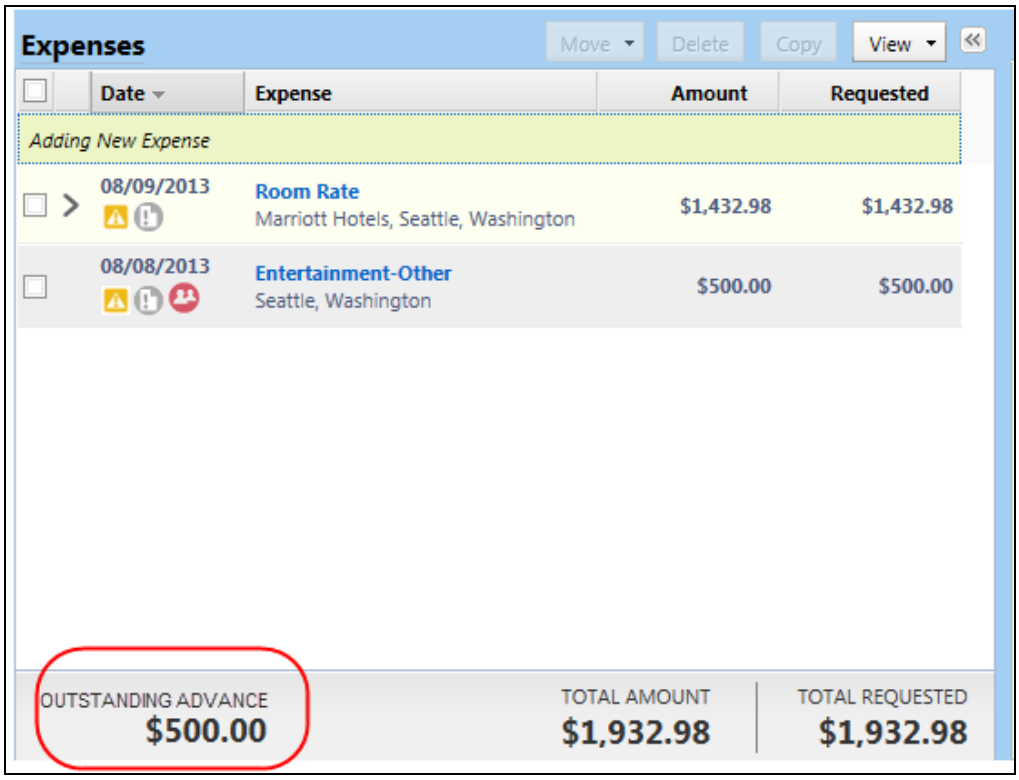
These enhancements provide better visibility and usability for the cash advances within Expense.

What the User Sees

If the user has outstanding cash advances, he/she is prompted to assign them to the report when creating a new report:

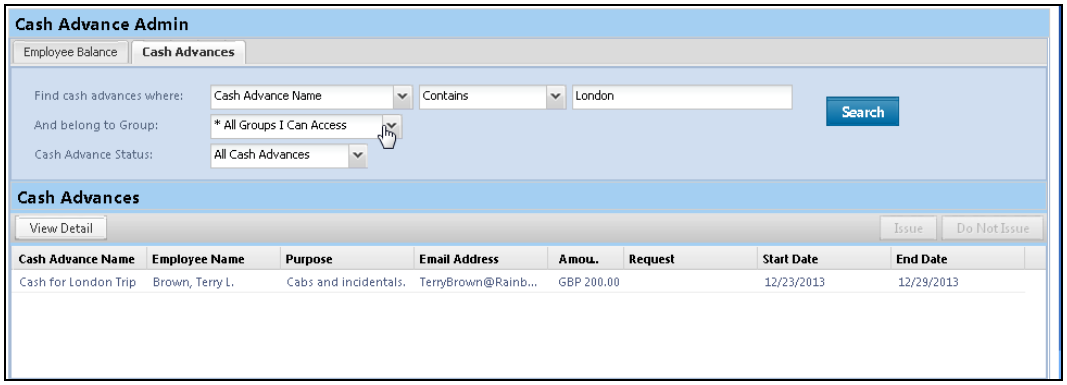


Within the expense report, the user sees a running total of the amount remaining on the assigned cash advances:



The Cash Advance Admin tool has been updated with additional functionality. The **Pending Issuance** tab has been renamed to **Cash Advances**, and enhanced with search functionality. The Cash Advance administrator can now search for cash advances by a variety of fields:

- Specific employee information (such as employee name)
- Request Date
- Amount Requested
- Start Date
- End Date
- Requested Disbursement Date
- Account Code
- Cash Advance Key
- Group
- Cash Advance Status



Configuration/Feature Activation

NOTE: This feature is available to clients with Concur Expense or Concur Expense integrated with Concur Request.

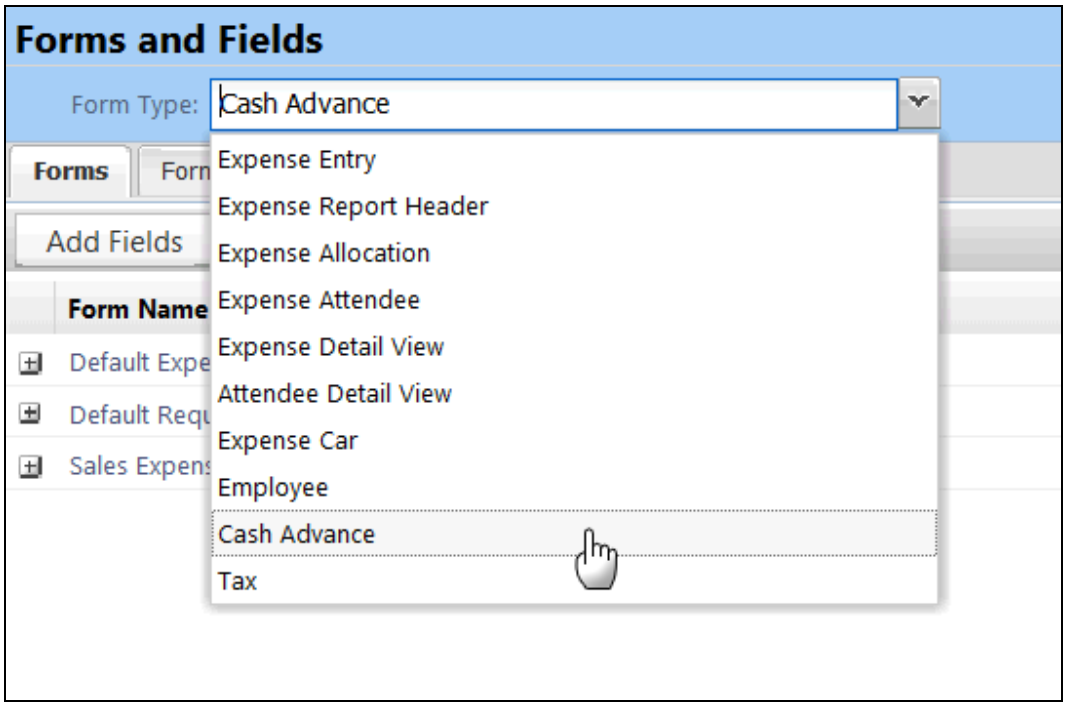
AUTOMATICALLY AVAILABLE FEATURES

All of the features described above in *Automatically Applied Updates* are automatically on. There are no additional configuration steps to activate or configure this feature.

CASH ADVANCE FORM

Clients must contact Concur Client Support for assistance.

Concur will access the new cash advance form by clicking **Administration** > **Expense Admin** > **Forms and Fields** (left menu).



The admin clicks *Cash Advance* in the **Form Type** list.

EMAIL REMINDERS

Clients can create new email reminders by clicking **Administration** > **Expense Admin** > **Email Reminders** (left menu).

ADDITIONAL INFORMATION

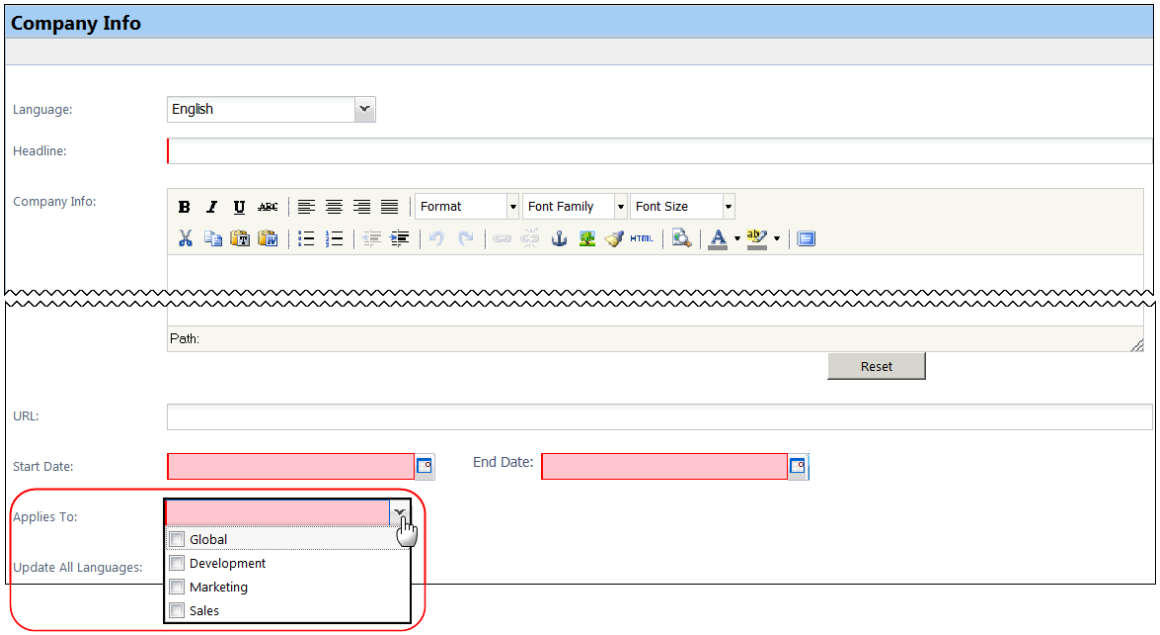
For more information, refer to the *Expense: Cash Advance Setup Guide*, the *Expense: Forms and Fields Setup Guide*, or the *Expense: Email Reminders Setup Guide*.

Company Info: Configurable by Employee Groups

Overview

With this release, the Company Info messages will become group-aware. This way, the Company Info admin can provide company-related information specific to the group – for example, only the users in the Sales group would see sales-related information.

To accomplish this, the **Company Info** page now has a required **Applies To** field where the admin selects the group or groups who will see the information.



BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows the client to direct specific Company Info messages to specific groups of users.

NOTE: At the time of the release, all existing messages will be automatically assigned to the Global group. If desired, after this release date, you can access an existing message and assign it to one or more desired groups.

What the User Sees

The user sees Company Info messages that are designed only for his/her group.

What the Admin Sees

NOTE: This change applies to all Concur products that use the Company Info feature in Concur. The sample below describes the process in Expense.

▶ ***Creating a group-specific Company Info message:***

1. Click **Administration** > **Expense Admin** > **Company Info** (left menu).
2. Create the message as usual, as described in the *Shared: Company Info User Guide*.
3. In the **Applies To** list, either:
   - Click one or more groups.
   - Click *Global* if you want the message to be seen by all groups.

Configuration/Feature Activation

This feature is automatically on. There are no additional configuration steps to activate or configure this feature.

Attendees: Search Retains Value When Attendee Type is Changed

Changing the type of attendee when performing a search for an attendee no longer clears the name value from the search. Now, the name is retained and may be used as the search criteria on the new attendee type form that displays.

BUSINESS PURPOSE / CLIENT BENEFIT

The client is prevented from having to repeat the action of typing in the same name a second time – that name is remembered by the system and automatically entered in the search field.

What the User Sees

The user now sees the search criteria (name) in the search field when the screen refreshes to display a new form associated with the new attendee type they are searching for.

Configuration/Feature Activation

This feature is automatically on. There are no additional configuration steps to activate or configure this feature.

Workflows: Skip the Second Default Approver Step

Overview

With this release, if the workflow is defined to use the second default approver but there is no such approver listed in the user's profile, then the step can be configured to skip.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows clients to use the second default approver workflow and easily manage those times when there is no second default approver assigned, either intentionally or accidentally by the client.

What the User Sees

The user sees no difference.

Configuration/Feature Activation

Clients interested in using this feature must contact Concur Client Support for assistance.

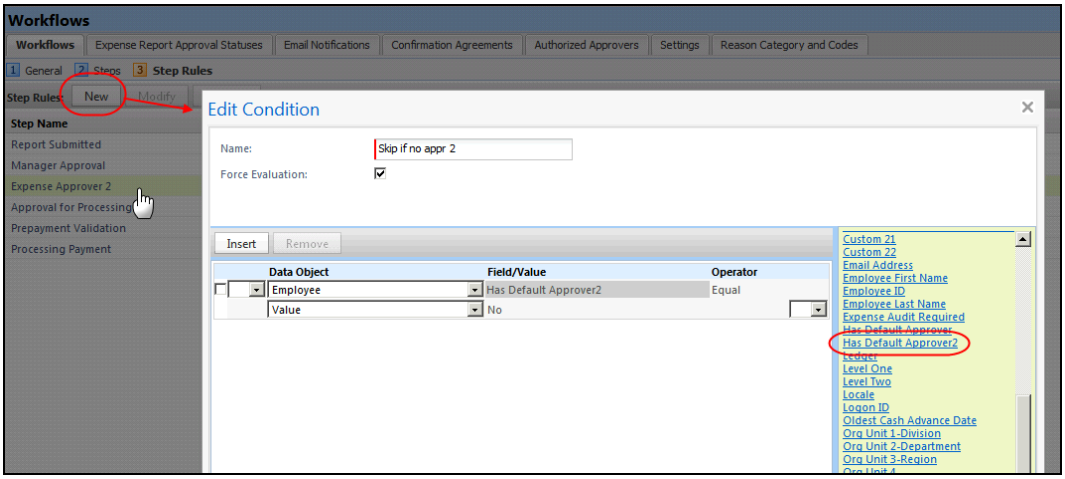
Concur completes these configuration steps.

NOTE: This sample assumes that you have already set up the second default approver workflow step and you are now configuring the step to be skipped if there is no second default approver.

To skip the second default approver step:

1. Click **Administration** > **Expense Admin** > **Workflows** (left menu).
2. Either:
   - Click the desired workflows and click **Modify**.
     – or –
   - Double-click the desired workflow.

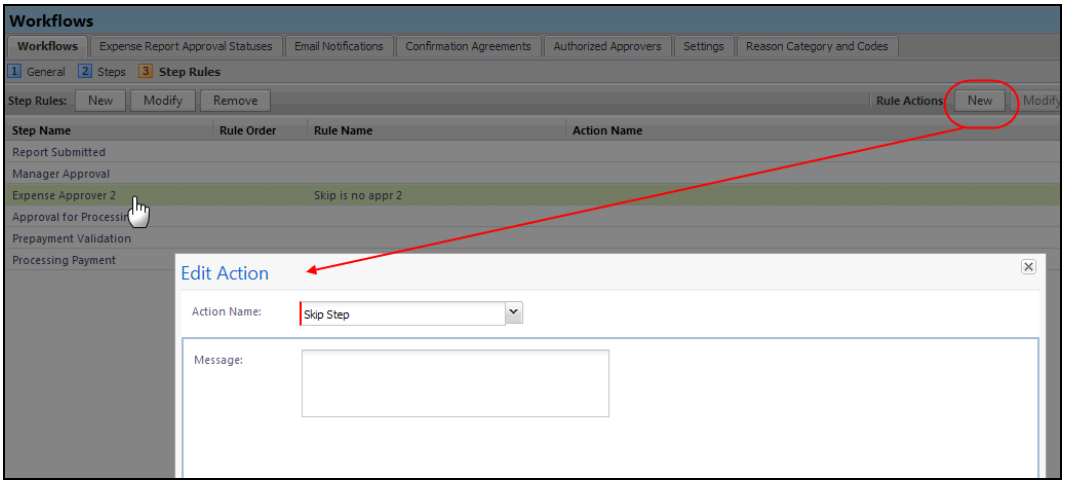
   The **Workflows** tab appears.
3. Click the **Step Rules** tab.
4. On the **Step Rules** tab:
   - Select the step used for the second default approver.
   - In the **Step Rules** section, click **New**.



5. In the **Edit Condition** window:
   - Complete the **Name** and **Force Evaluation** fields as usual.
   - From the **Data Object** list, click *Employee*.
   - From the **Field/Value** list, click *Has Default Approver2*.
   - From the **Operator** list, click *Equal*.

- From the **Field/Value** list, click *No*.
- Click **Save**.

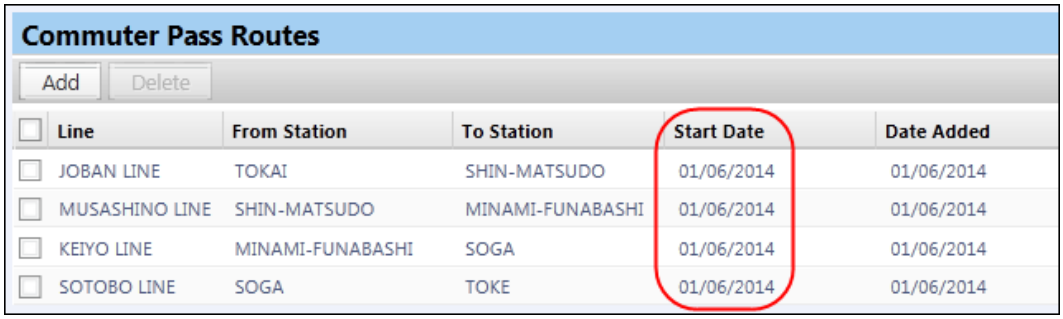
6. On the **Step Rules** tab:
   - Select the step used for the second default approver.
   - In the **Rule Action** section, click **New**.



7. In the **Edit Action** window:
   - From the **Action Name** list, click *Skip Step*.
   - In the **Message** field, enter the desired message.
   - Click **Save**.

Japanese Public Transportation: Profile Enhancement

With this release, the Expense system will now record the start date of the commute card when registered in Expense using My Profile.

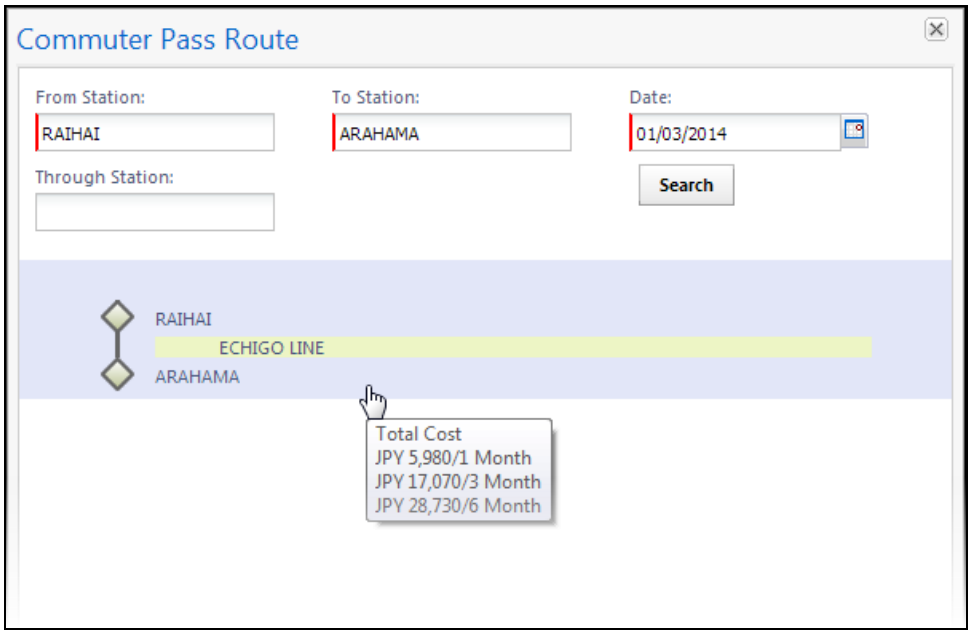


Commuter Pass Routes

Add | Delete

Line	From Station	To Station	Start Date	Date Added
JOBAN LINE	TOKAI	SHIN-MATSUDO	01/06/2014	01/06/2014
MUSASHINO LINE	SHIN-MATSUDO	MINAMI-FUNABASHI	01/06/2014	01/06/2014
KEIYO LINE	MINAMI-FUNABASHI	SOGA	01/06/2014	01/06/2014
SOTOBO LINE	SOGA	TOKE	01/06/2014	01/06/2014

In addition, when registering routes in My Profile or User Admin, the system will reference the card's start date and use Jorudan to validate the commuting route the user is entering. The new **Commuter Pass Route** screen lets the user enter the routes and date, and note the cost of the commute in a user-friendly interface.



BUSINESS PURPOSE / CLIENT BENEFIT

This validation prevents entry of invalid commuter passes (start date check), and adds accuracy and additional detail to the commuter routes (Jorudan) used by the employee.

Configuration/Feature Activation

This feature is automatically on. There are no additional configuration steps to activate or configure this feature.

Digital Tax Invoice Validation: Mexico Only

Overview

Currently, the Digital Tax Invoice upload feature allows users in the supported countries (Mexico only) to attach the Digital Tax Invoice (CFD) to an expense. Once the tax invoice (in XML) has been added to an expense report, a new web service will allow third-party validators to use the Concur Platform to view and validate the tax information. The validators send their results back to Concur using the web service. The results appear in the expense report for processors and workflow steps to evaluate.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides the ability to incorporate digital tax invoice validation into the expense report workflow to meet the requirements of the Mexican tax authority.

What the User Sees

The user will see no difference.

Configuration

This feature is currently available to clients in Mexico. The clients using this feature must coordinate with the validators to contract for validation services and to enable the web service. The validators must have a registered partner application capable of utilizing the Concur web services, and the client must grant access to the partner application before the validator can view their data. The client can choose to add workflow steps verifying that the tax invoice has passed validation before the report can be approved.

As the first release of this new web service, it will be necessary to work with Concur Client Services to activate the partner application and to make any necessary configuration changes to the workflow.

Travel Allowance: Belgium

Additional options are added to the Belgian travel allowance configuration for partial day international travel and meals.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement ensures the client is traveling under the latest country and business requirements.

Configuration/Feature Activation

This feature is automatically on. There are no additional configuration steps to activate or configure this feature.

📖 Refer to *Travel Allowance Configuration Guide – Belgium* for more information.

Locations - Maintenance Updates Starting in January

All clients configured to receive Locations updates from Concur will see approximately 40,000 new locations added to the system **between the January and February release dates (January 17 – February 7)**. Therefore, clients wishing to opt out of this maintenance should update this site setting sometime before this upgrade is performed in a future release.

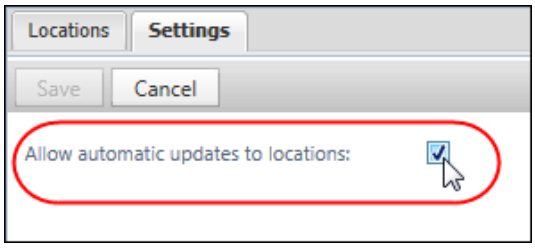
IMPORTANT! - UPDATE SITE SETTINGS TO PREVENT ADDITION OF LOCATIONS!

You must take action if you want to prevent the update of locations for your company!

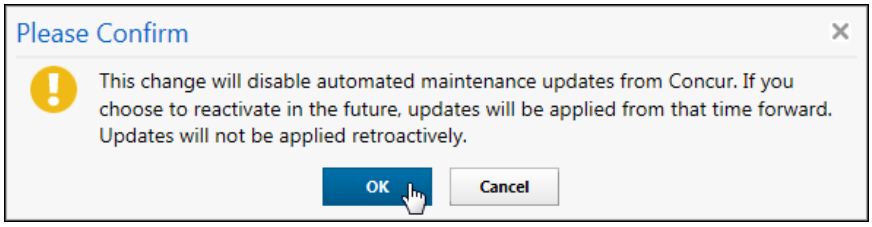
A check box that prevents Concur from automatically updating the client's list of Locations is available to the Locations administrator. Use this check box to prevent Concur from automatically updating locations at your company.

Explanation of Behavior

The new check box, **Allow automatic updates to locations**, is available on the Locations **Settings** tab. It is selected (enabled) by default, meaning that Concur location maintenance updates will be automatically applied to your company's list of Locations.



By clearing (disabling) the check box, location updates offered by Concur will not be accepted by your company when they are released in between the January and February releases, and in any future service release. A confirmation message explaining this appears when you disable the setting.

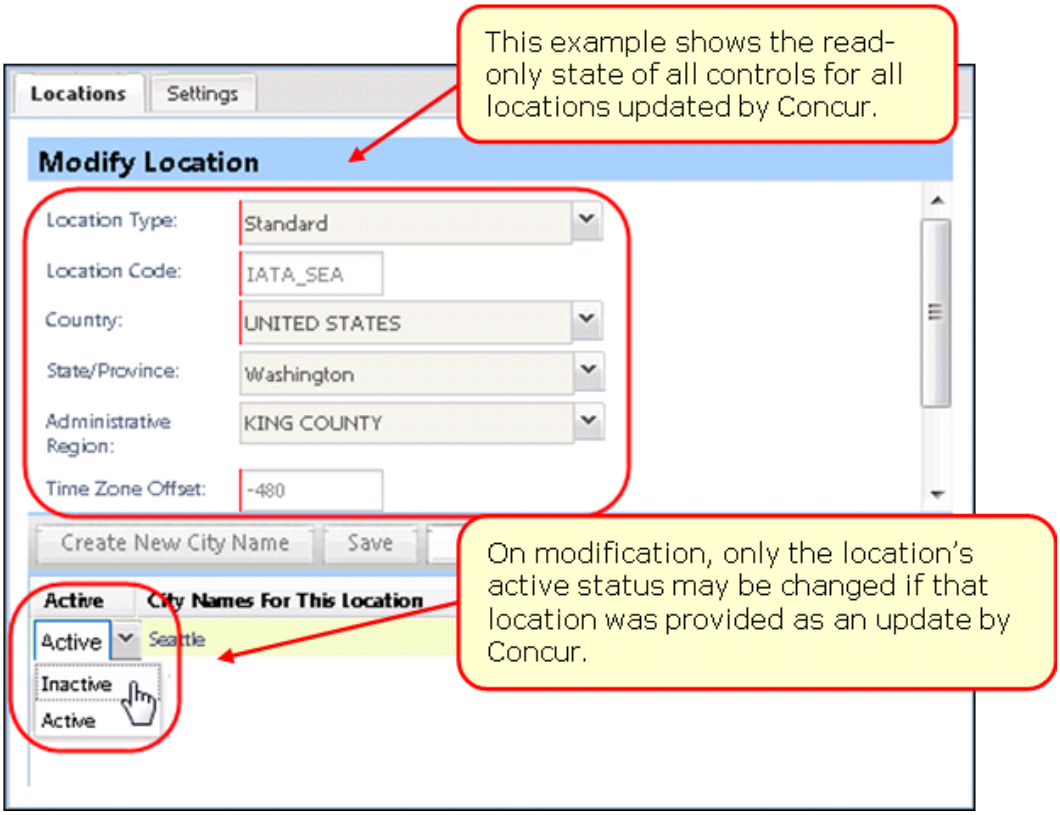


! *Once disabled, it will be the responsibility of the client to maintain their list of locations. Further, Concur cannot retroactively identify and update location data for a client during the disablement period should the client elect to re-enable the setting: only changes going forward from the date the setting is reactivated will be delivered by Concur.*

Locations managed by the Concur update of Locations (based on the United Nations LOCODE list) will not allow client modifications. **Any locations added or updated during a period when the company is configured to receive locations update will be marked as Concur-maintained**. The Locations administrator will be allowed only to activate or deactivate these locations – all other actions will be unavailable to the admin.

WHAT THE ADMINISTRATOR SEES FOR CONCUR-MAINTAINED LOCATIONS

The administrator working in the Locations tool will have full functionality for those locations they create and manage. However, if they are working with any location that was included in the Concur location update, they will be restricted to selecting that location only for activation and deactivation. All other functionality for that location will unavailable. Import of changes for that location will not be permitted.



FREQUENTLY ASKED QUESTIONS

My company has made significant changes to the default locations – we don't want any changes from Concur!

Simply update the locations setting so that it is not selected (disabled), and your company will not receive Concur updates for locations. (This setting has been available for the last 6 months, so you may have already done this.)

What will happen with locations that have been added by my company?

All of the locations added by your company will be untouched and will continue to be available to your users.

If a city you have added uses the exact same location code as a UN location, Concur will not add that location to your company, as we cannot be certain that it is in fact the same location. The record already in your database will continue to be a client-specific location that is not maintained by Concur.

What if my users need an alternate name added for a Concur-maintained location?

Concur has used multiple data sources in addition to the United Nations LOCODE listing to provide many alternate names for each location.

For example, the Japan location code JPTYO has the names: Tokyo, 東京 and ﾄｳｷｮｳ. The Finland location code FISIP has the names Sibbo, Sipoo, Sibboviken, and Sipoonlahti.

If you find that the name of that city used by your users is NOT included, you may suggest to Concur that this name be added to the list.

My company had previously added alternate names for locations that are now Concur-maintained – what happens to those names?

All locations where your company has made modifications will remain as client-specific, and not be marked as Concur-maintained. No updates will be made to these records.

What if my company had inactivated a Concur-provided location?

This location will remain inactive, though Concur may update the information on that location record, such as alternate names and state/province information.

The Concur-maintained location for the city where my company is located is not right for my users – what should I do?

If a specific Concur-maintained location does not suit your business needs, simply inactivate that location. Then create a new location record for your company that has the exact information that you require. This might be the case for cities where you have business premises or cities where your users frequently travel.

For example, if your company uses travel allowances in the United States, the rates are assigned based on the county (administrative region) for the location. There are a small number of cities that span more than one county, so the county assigned to that city may not exactly match the county where your premises are located.

📖 For information about creating and managing locations, refer to the *Shared: Locations Setup Guide*.

Section 2: Expense Pay

Batches: Close on Multiple Weekdays

Overview

Concur has updated the batch scheduling options for Expense Pay batches to allow administrators to close batches weekly on multiple weekdays.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides more scheduling flexibility, aligning with the SAE options.

Configuration/Feature Activation

The administrator configures the batch schedule in the **Schedule** section of the **Batch Definition** tab in Payment Manager. The administrator selects the Weekly schedule option, and check boxes for days of the week appear. The administrator can select one or more weekdays for the batch closing schedule. The batch will close on each of the selected weekdays.

Section 3: Supported Configurations

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

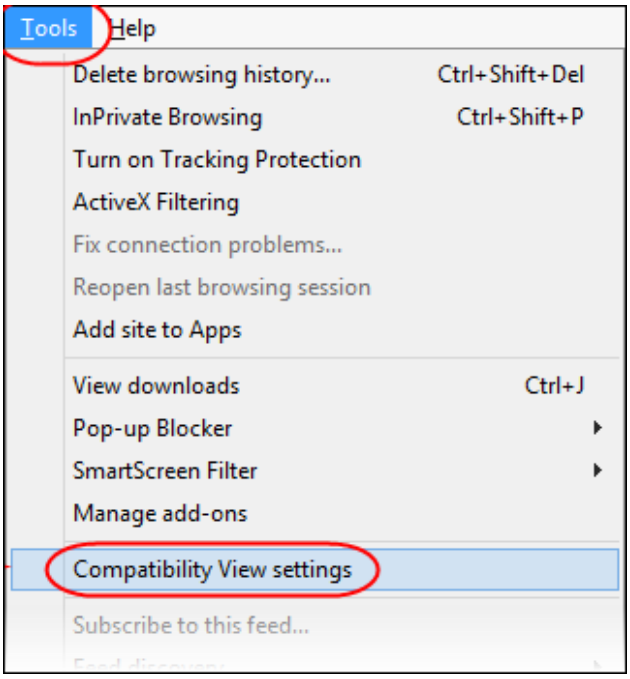
Overview

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.

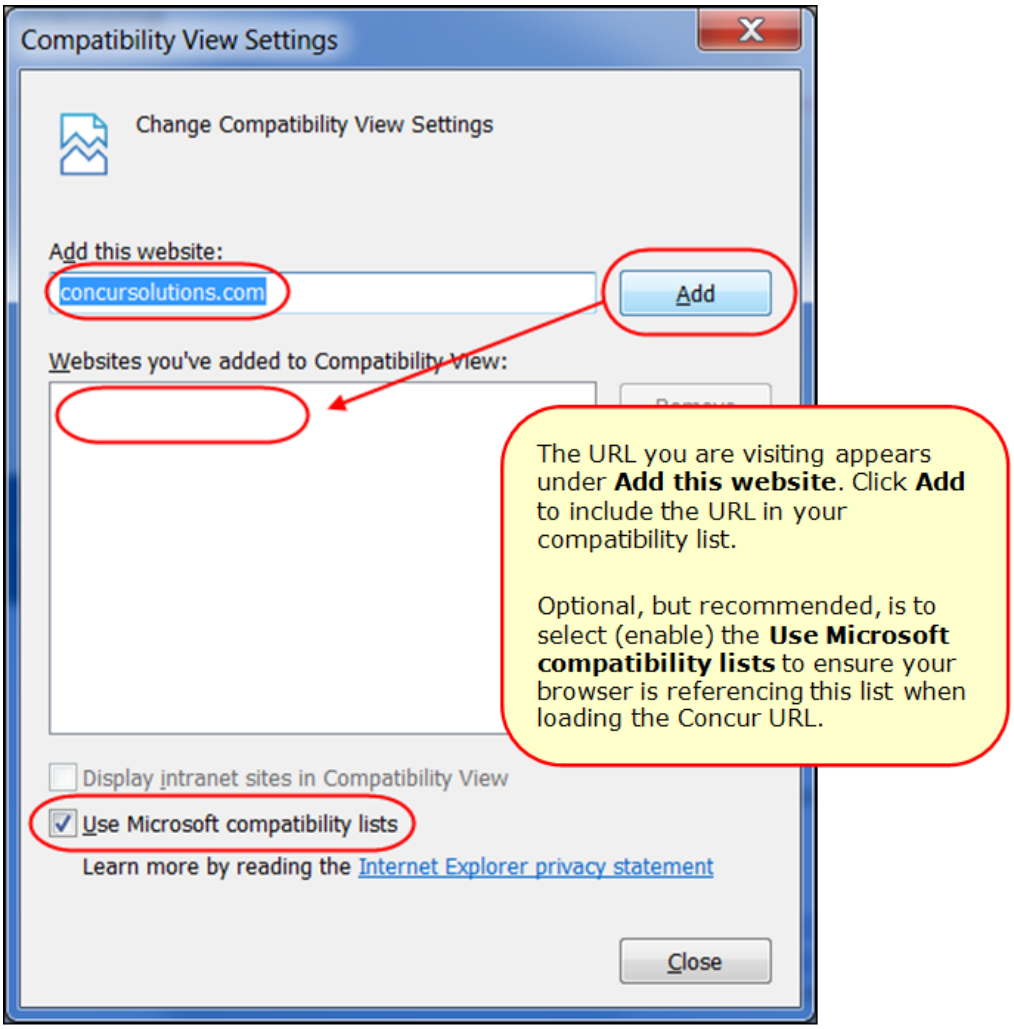
- ***To add Concur to your IE v. 11 compatibility list:***

1. In IE v.11, load the Concur page (for example, www.concursolutions.com).
2. Click **Tools** > **Compatibility View settings** to open the **Compatibility View Settings** dialog box.



Optional: If the **Tools** menu is not displayed, show this menu by pressing Alt.

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, Webinars, and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

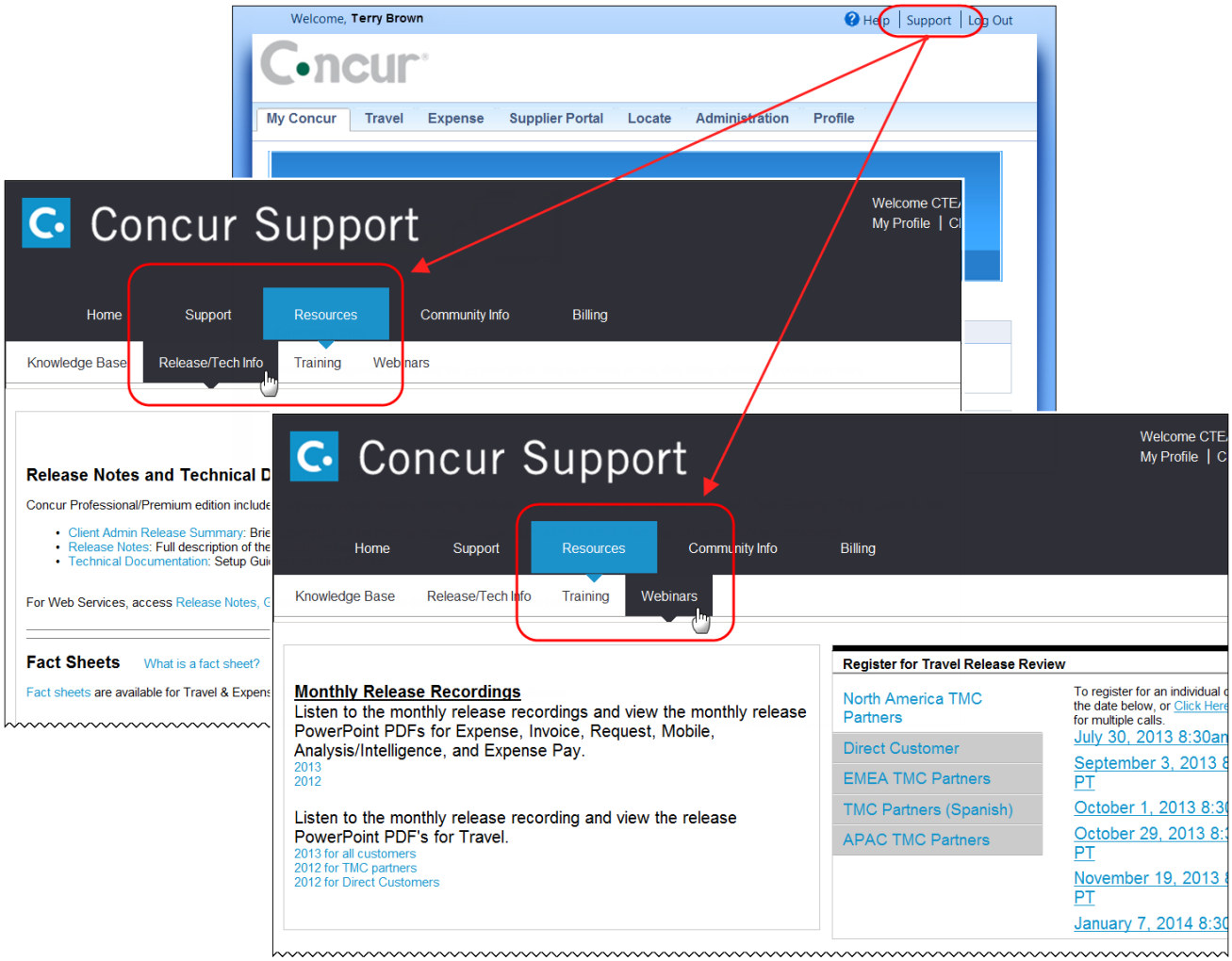
Additional Release Notes, Webinars, and Technical Documentation

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**.

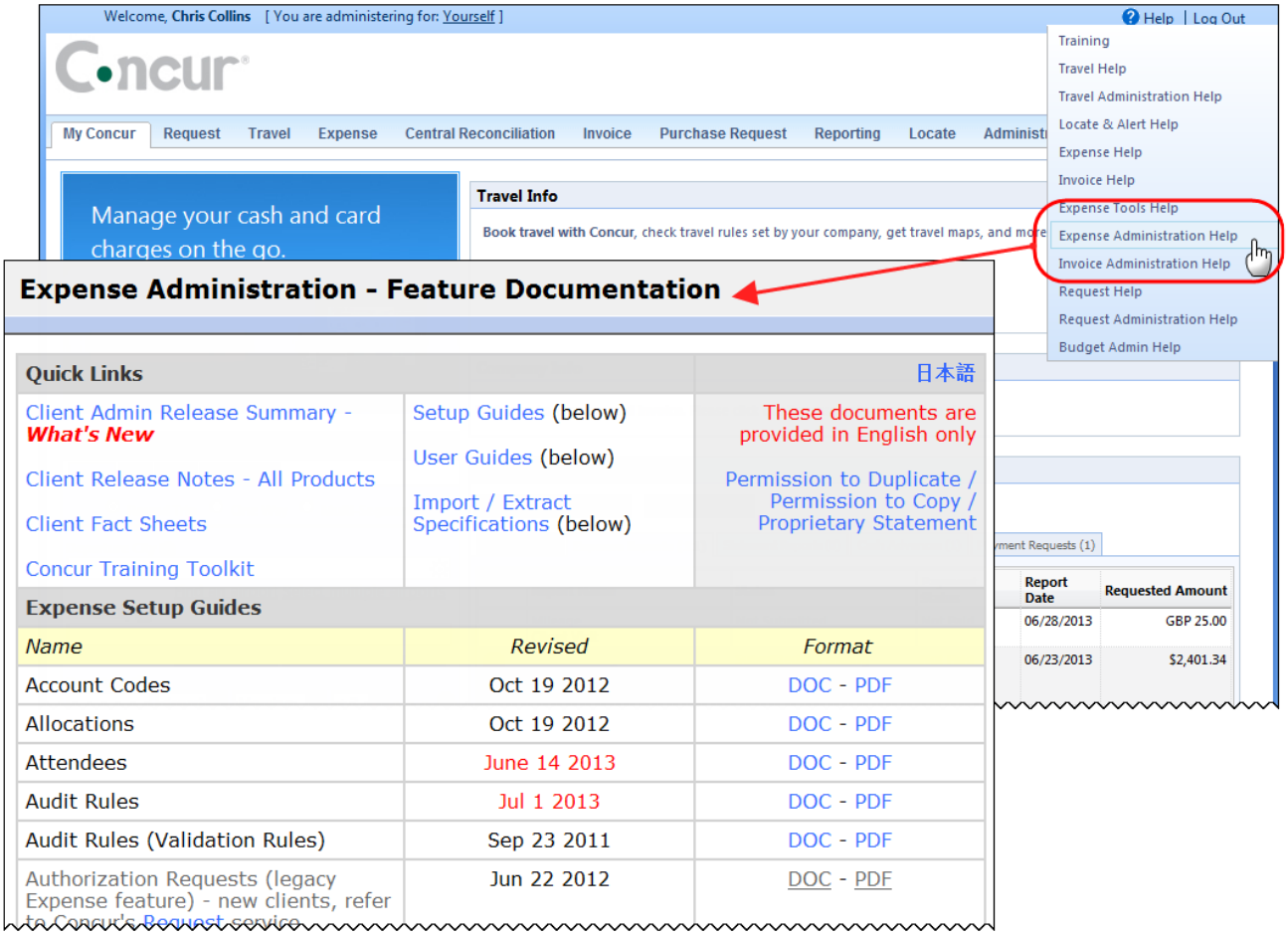
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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.



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February 2014 Update #1: Friday, February 07, 3:00 PM PT	Client – **FINAL**

Contents

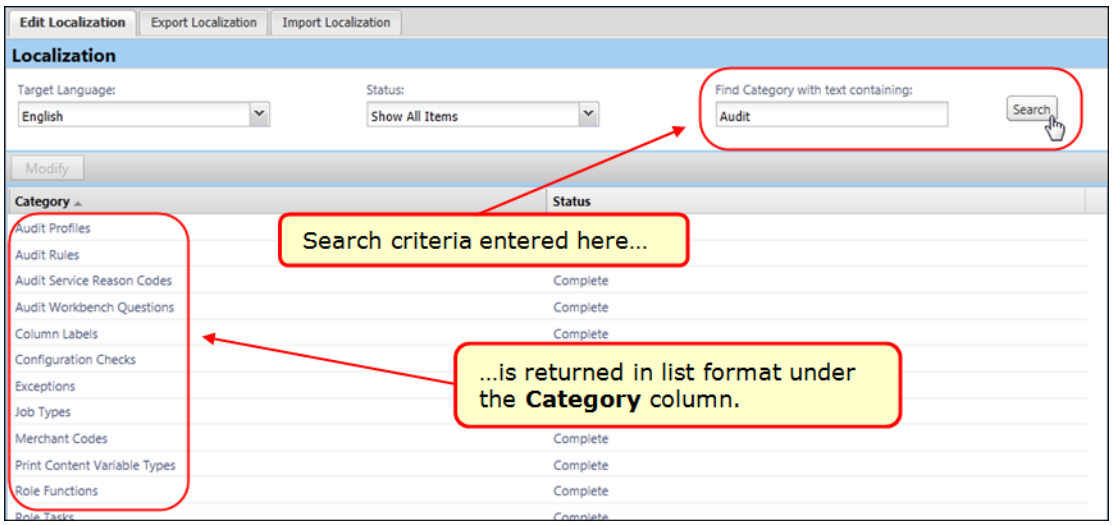
Release Notes

Section 1: Expense

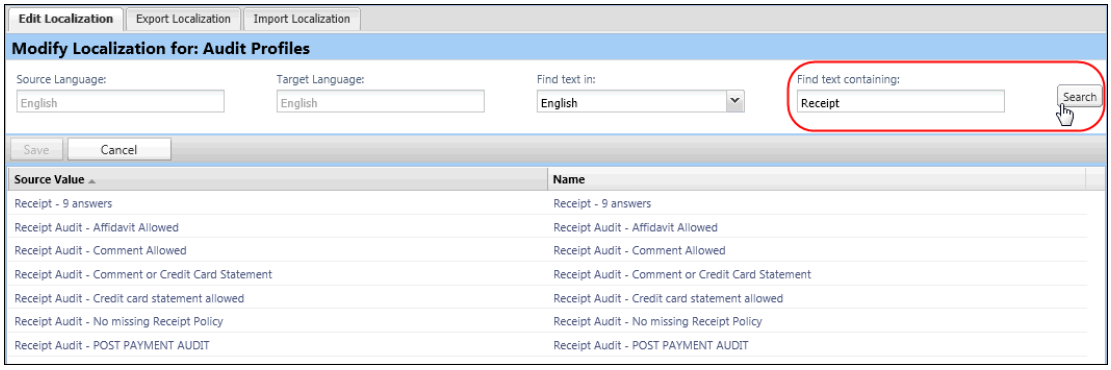
Localization: Search Functionality Now Available

Overview

The Localization tool now allows the admin to search for a specific word or phrase. In the example below, entering the word "Audit" in **Find Category with text containing** field returns a list of categories containing the word "Audit."



Then, the admin can open a category and search its contents by typing the search criteria in the **Find text containing** field.



BUSINESS PURPOSE / CLIENT BENEFIT

This update will reduce the time it takes to find and modify (localize) a phrase.

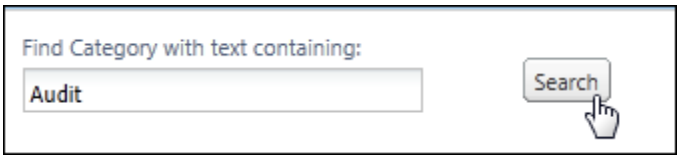
What the User Sees

The user sees the newly translated phrases for their locale after they log in.

What the Admin Sees

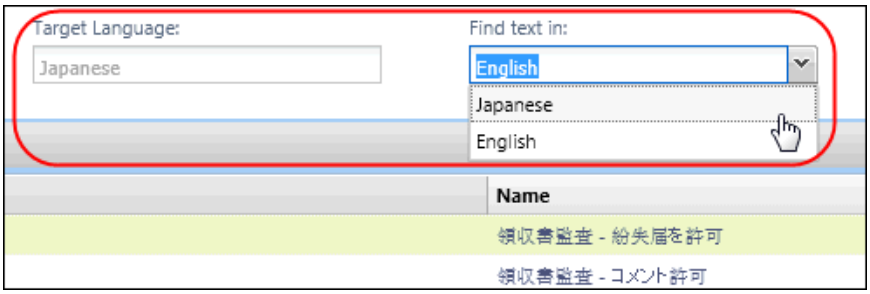
- ***To search for phrases to localize:***

1. Click **Administration** > **Expense Admin** > **Localization**.
2. On the **Edit Localization** tab, enter a word or phrase in the **Find Category with text containing** field.



3. Click **Search**. The page refreshes, listing the categories containing the desired word or phrase.
4. Click a category and then click **Modify** to view the phrases in that category.

   Optional: The user can switch to the source language at this time.



5. Enter the search term in the **Find term containing** field and then click **Search**. The phrases containing the search criteria are listed for localizing.

Configuration/Feature Activation

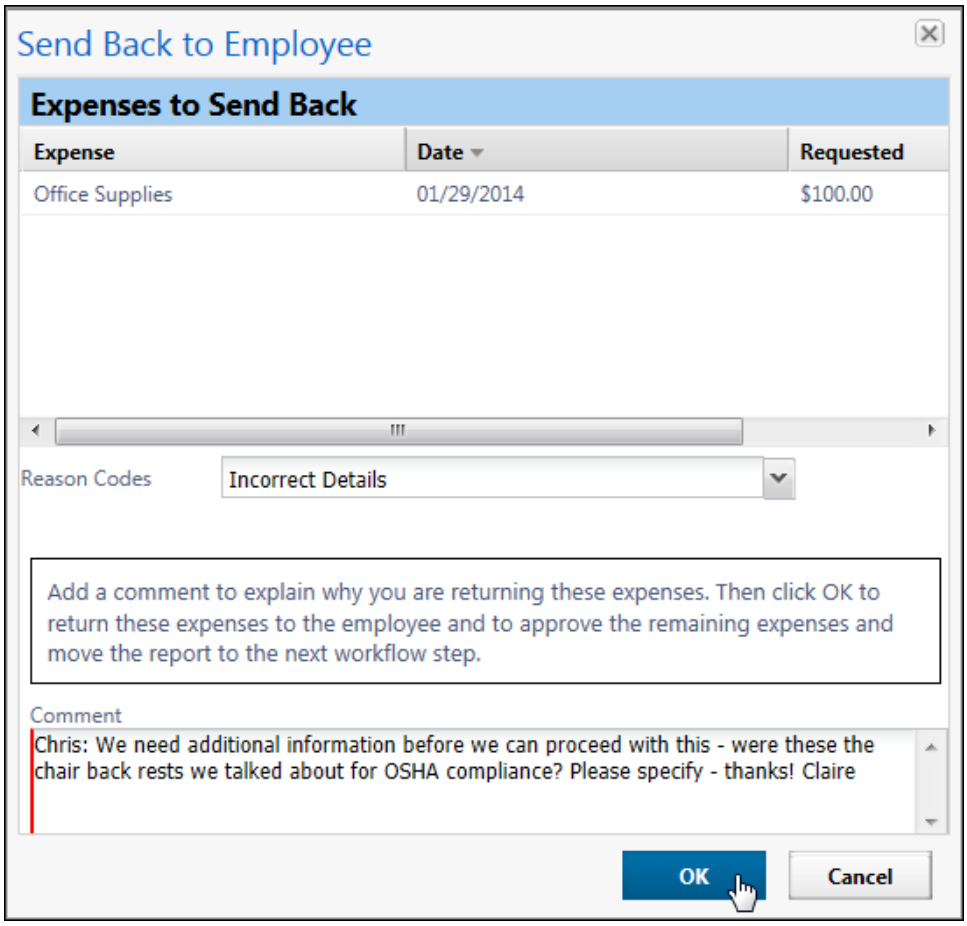
This feature is automatically on and available to the administrator. There are no additional configuration steps to activate or configure this feature.

📖 Refer to *Shared: Localization Setup Guide for* more information.

Processor: Add Reason Codes For the Split Report (Send Back Expense) Return Type

Overview

A processor may now include a reason code when explaining the return of *part* of a report (an expense) to the report originator. This feature extends the report-level reason code functionality to the split-report function, requiring the administrator to select a reason code (required) just as they are required to include a reason code if the entire report, with *all* expenses, was returned.



The reason code and comment are included in the addendum report that is created whenever a split-report return is generated by the system.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature fills a gap where no reason code is included in the split-report function, and supports auditing at every level of the report return.

What the User Sees

The user now sees a reason code and comment with the addendum expense report that is returned from the original expense report.

What the Processor Sees

The processor now sees and must select from the **Reason Codes** list whenever he/she uses the **Send Back Expense?** field to return one or more expenses from an expense report.

Configuration/Feature Activation

This feature is automatically on if the client already uses reason codes and the split-report feature.

Audit Rules and Exceptions: Variables Available for Amount-Based Rules

Overview

If the client uses amount-based audit rules (such as those that track daily, weekly, or monthly totals), the client can now include variables in the exception message that appears to the user, approver, and/or processor. For example, assume that an audit rule is triggered if a user spends more than $50 a month for office supplies. Further assume that the admin created an exception message that includes the amount variables.

So, when the user saves an office supply expense for $15, which brings the monthly total to $60, the exception message might be: "The monthly limit for this type of expense is $50. Your expense exceeds the limit by $10, bringing the monthly total to $60. Be sure to include a comment for your approver."

BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows the client to provide more complete information to its Concur users.

What the User Sees

The user sees the associated amounts while creating expenses.

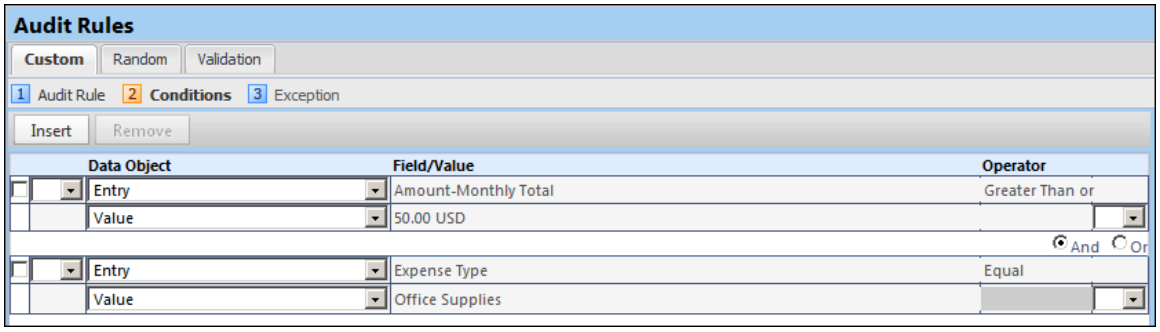
What the Admin Sees

Once the feature is activated (described in *Configuration/Feature Activation* below), the admin can create the audit rule exception messages.

The new exception message variables can be used with audit rules that meet the following criteria:

- The event must be one of these:
  - Entry Save
  - Entry Submit
- The data object must be Entry.
- The field/values must be one of these:
  - Amount
  - Amount-Daily Total
  - Amount-Daily Total (multiple expenses)
  - Amount-Monthly Total
  - Amount-Monthly Total (multiple expenses)
  - Amount-Weekly Total
  - Amount-Weekly Total (multiple expenses)
  - Amount-Yearly Total
  - Amount-Yearly Total (multiple expenses)
  - Foreign Amount
- The operator must be one of these:
  - Greater Than
  - Greater Than or Equal

For example, this audit rule would track office supply expenses that total $50 or more in a month:



NOTE: If there is more than one amount condition in an audit rule that meets the criteria, the ***last*** condition that evaluates to ***True*** will define the amounts that are reported. **Best Practice:** *Use only one condition per rule that meets the criteria*.

Then, when creating the exception for the audit rule, the admin can use any or all of these variables. (These variables are not case-sensitive.)

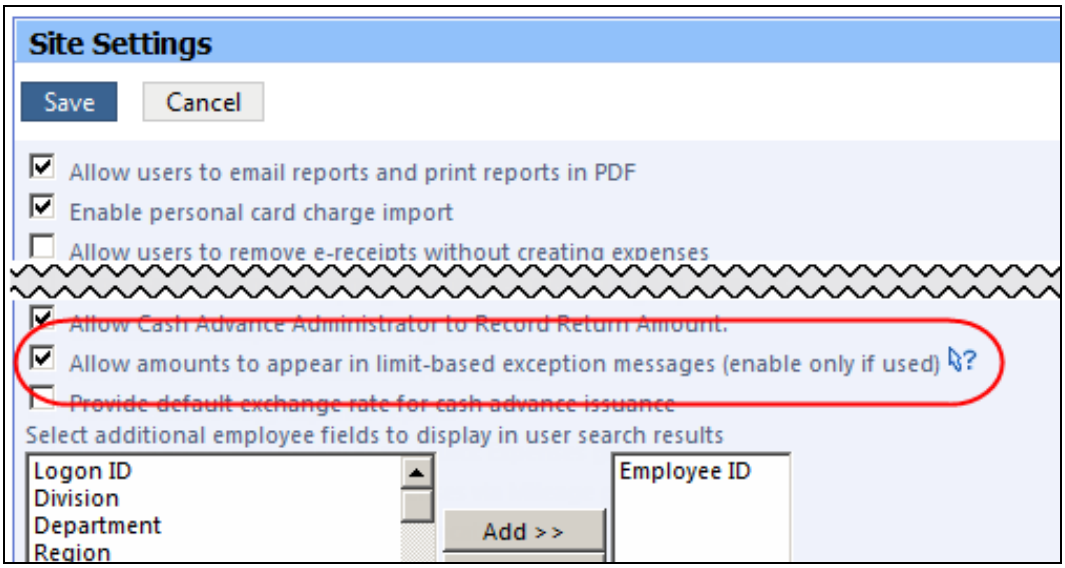
Variable	Description	Currency
%AmountLimit%	Amount of the limit as defined in the rule	Appears in the exception in the currency defined in the audit rule – with the appropriate symbol (such as the dollar sign) or three-character currency code (such as CAD)
%AmountOverLimit%	Amount that exceeds the limit (TotalAmount *minus* AmountLimit)	
%TotalAmount%	Total amount of the expense(s) selected by the rule	
%UserTotalAmount%	Total amount of the expense(s) selected by the rule – in the applicable currency	If the audit rule amount condition uses the **Foreign Amount** field, then this amount appears in the exception in the transaction currency of that expense. If the audit rule uses any of the other amount fields listed above, this amount appears in the exception in the currency of the expense report.

Configuration/Feature Activation

This feature is activated in Site Settings.

To activate:

1. Click **Administration** > **Expense Admin** > **Site Settings** (left menu).
2. Select (enable) the **Allow amounts to appear in limit-based exception messages (enable only if used)** check box.



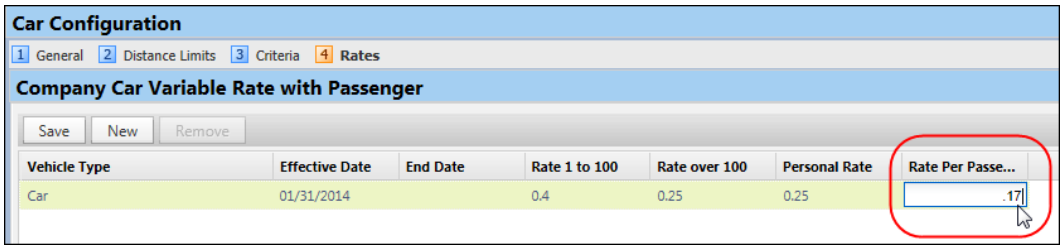
Note the following:

- If you do not intend to use variables in exception messages, do not enable this check box. This may cause slowing of your Expense processing.
- If you have created exception messages with variables and then you later clear (disable) this check box, the variable syntax, in plain text, is displayed instead of the amount as shown in this example:
  - **Enabled:**
    "Company policy limits expenses in this area to €50.00 per month. You have spent €80.48 this month, over the limit by €30.48."
  - **Disabled:**
    "Company policy limits expenses in this area to %AmountLimit% per month. You have spent %TotalAmount% this month, over the limit by %AmountOverLimit%."

Car Configuration: Additional Passenger Mileage for Company Cars

Overview

With this release, the ability to specify a variable rate for passengers is now extended to any Company Car configuration incorporating variable rates. This is done by entering the rate directly into an editable column, **Rate Per Passenger**, when using **Step 4, Rates** to configure a company car.



HOW THE CALCULATION IS PERFORMED

The rate is calculated as follows for company cars:

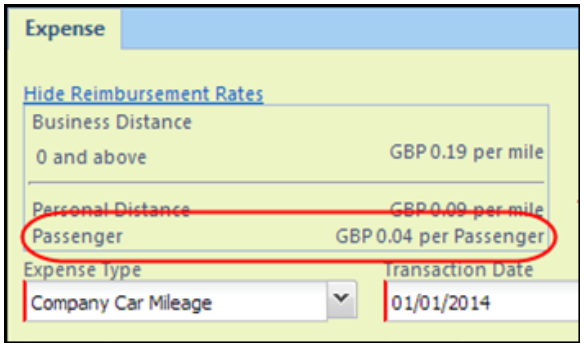
- Business Miles * Reimbursement Rate
  - *PLUS* -
- Personal Miles * Personal Rate
  - *PLUS* -
- Business Miles * No. of Passengers * Additional Passenger Rate

BUSINESS PURPOSE / CLIENT BENEFIT

By adding this feature, a company can now reimburse travelers at the specified rate for carrying additional passengers on a mileage journey in company cars.

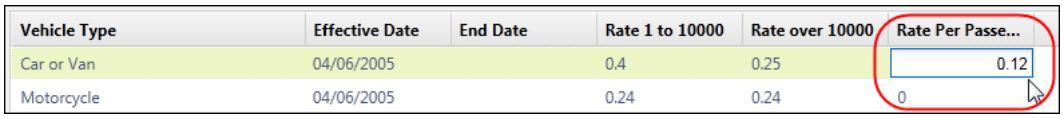
What the User Sees

The user creating an expense using the Company Car Mileage expense type will now see the passenger rate on the expense, based on the number of passengers they enter in the Mileage entry form.



What the Admin Sees

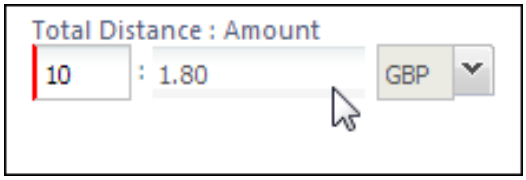
The Car Configuration administrator will see and can work with the new **Rate Per Passenger** editable column for their company car configurations incorporating a variable rate.



Vehicle Type	Effective Date	End Date	Rate 1 to 10000	Rate over 10000	Rate Per Passe...
Car or Van	04/06/2005		0.4	0.25	0.12
Motorcycle	04/06/2005		0.24	0.24	0

Configuration/Feature Activation

This feature is automatically on for any client using the Company Car module. There are no additional configuration steps to activate this feature; however, the rate configuration step must be completed to factor this and display it in the **Total Distance: Amount** field.



Refer to *Expense: Company Car Setup Guide* for more information.

Integrated with Concur Request: Cash Advance View in Expense

Overview

Until now, if an Expense user, approver, or Cash Advance admin wanted to view details of the request associated when a cash advance that originated in Concur Request, he/she would have to access Concur Request. With this release, the Expense user, approver, and Cash Advance admin can easily access the request.

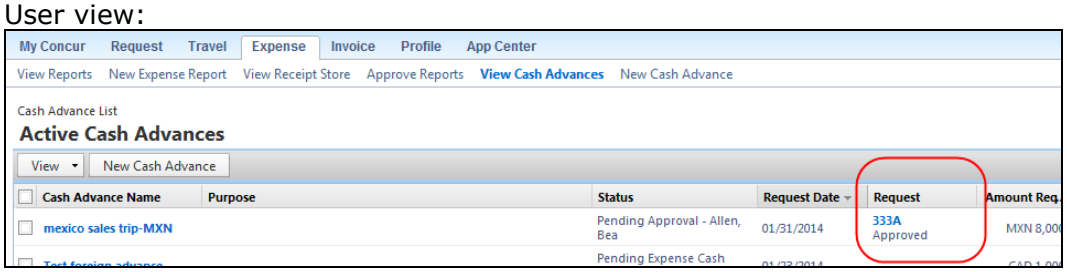
BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides a better end-to-end experience for users and admins who use both Concur Request and Concur Expense.

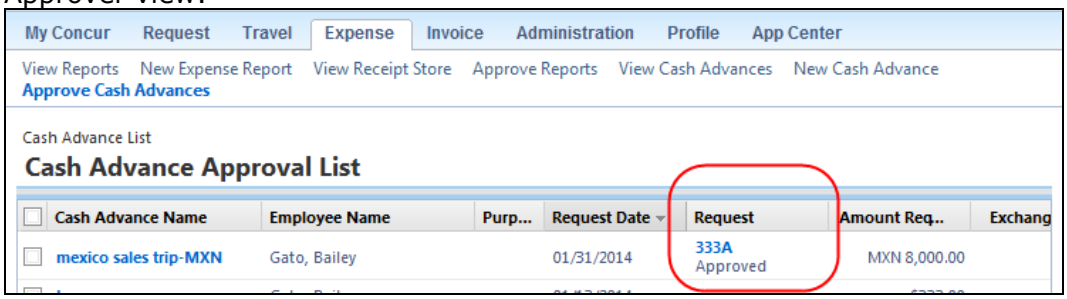
What the User and Approver See

Though the request number has always been available in the **Request** column, it is now a link.

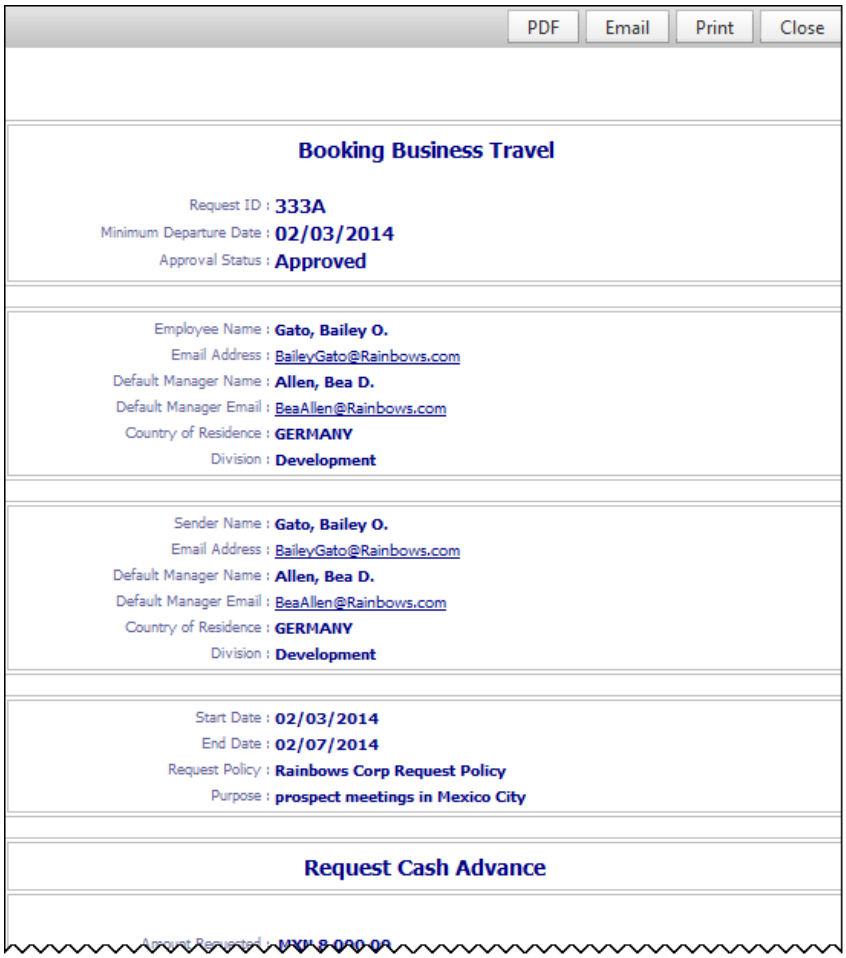
User view:



Approver view:

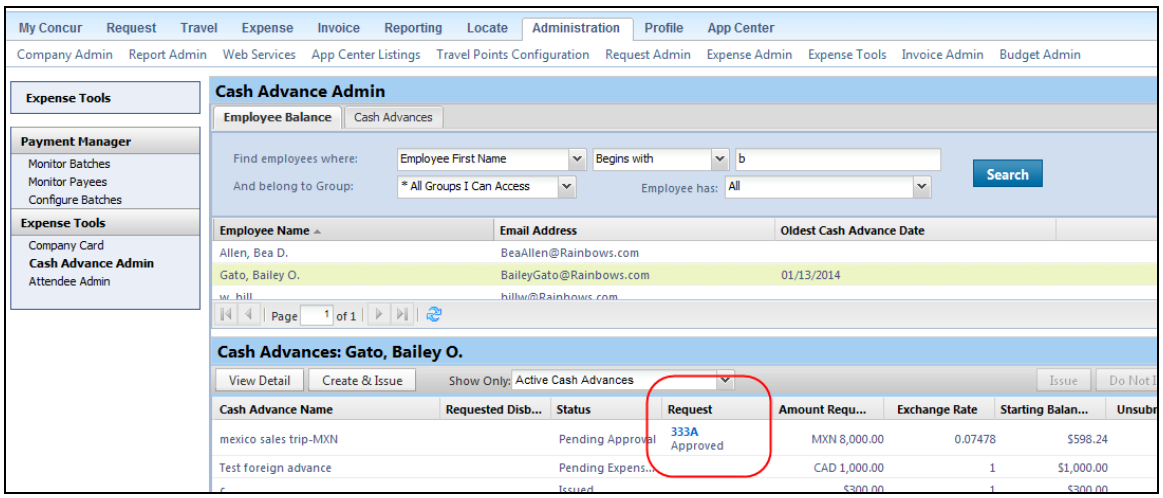


When the user clicks the link, the printed report (as configured in Request) appears.



What the Cash Advance Admin Sees

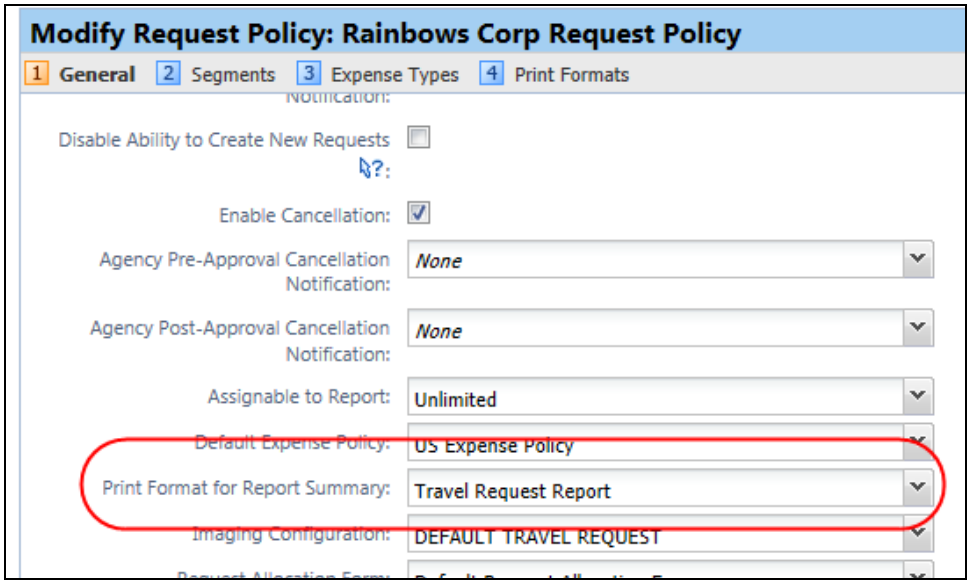
The Cash Advance admin sees the same view.



Configuration/Feature Activation

This feature is auto-on. There are no additional configuration steps to activate or configure this feature.

The printed report format used for this view is the same one that is used in the Expense Summary of a submitted expense report. This format is configured on the Request Policy:



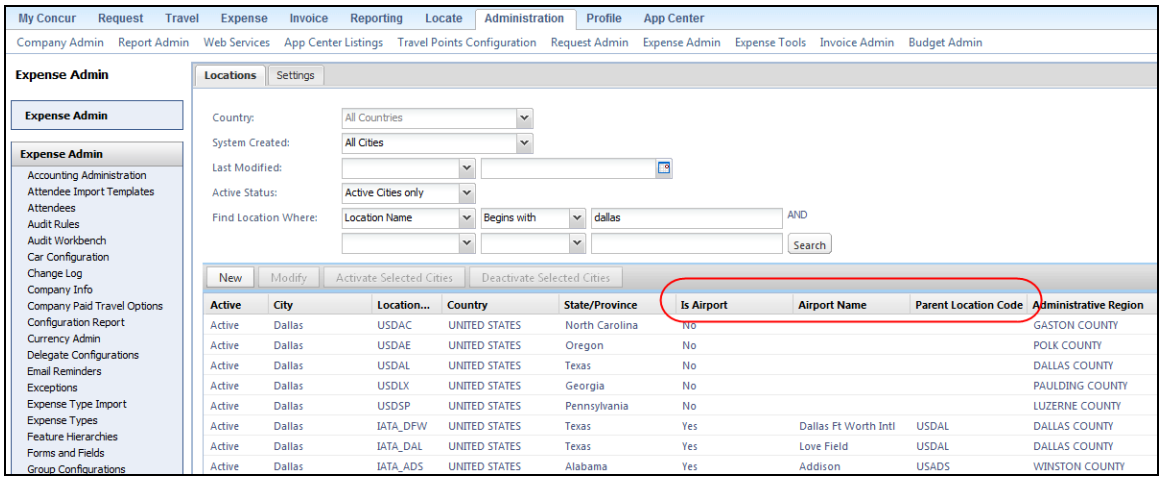
Locations: Separate City from Airport

Overview

NOTE: Though the Locations tool is shared among several of the Concur solutions, this new feature is used primarily by Concur Request – and less likely by Concur Expense.

With this release, admins using the Locations tool can easily distinguish city names from airport names. Concur has added three new columns to the **Locations** page:

- Is Airport
- Airport Name
- Parent Location Code (generally, the city where the airport is located)

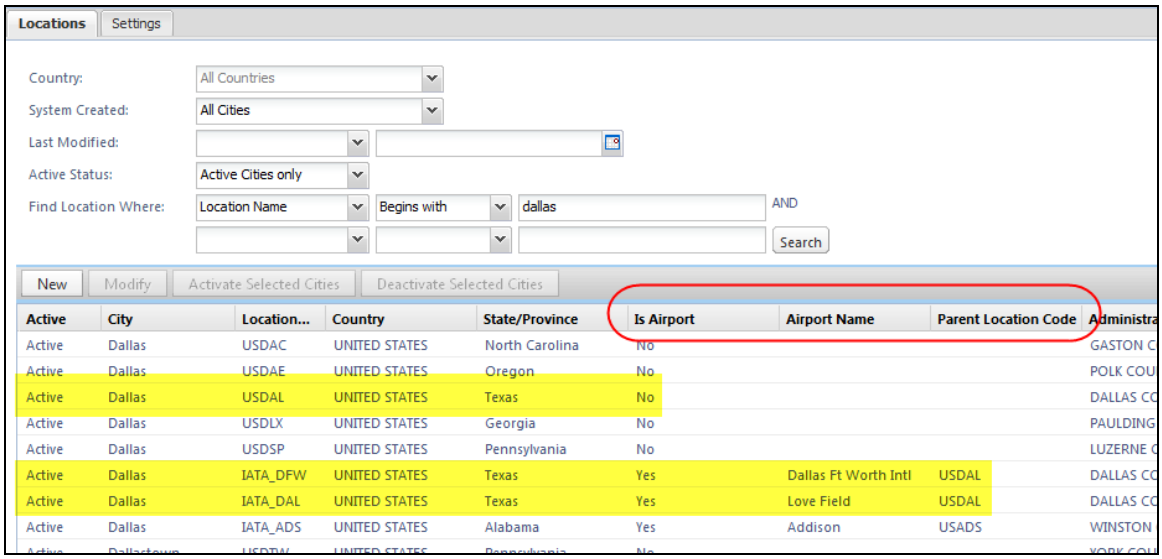


BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement makes it easier for clients to manage locations.

What the Admin Sees

The admin using the Locations tool (**Administration** > **Expense/Invoice/Request Admin** > **Locations** on the left menu) will now be able to distinguish city names from airport names.



In this example, note the following:

- In the first yellow bar above shows the city of Dallas, Texas (**Location Code** column = USDAL; **Is Airport** column = No).
- In the second yellow bar above:
  - Shows the Dallas Ft Worth International Airport in Dallas (**Location Code** column = IATA_DFW; **Is Airport** column = Yes; **Parent Location Code** column = USDAL)

- Shows the Love Field in Dallas (**Location Code** column = IATA_DAL; **Is Airport** column = Yes; **Parent Location Code** column = USDAL)

What the User Sees

The user sees no difference.

Configuration/Feature Activation

This feature is automatically on. There are no additional configuration steps to activate or configure this feature.

Localization: Change in German Text

Overview

Starting Wednesday, February 12, the German text strings will be updated. The term for *Request*, which is currently *Anforderung*, will be changed to *Antrag*.

Configuration/Feature Activation

There are no additional configuration or activation steps.

Card Programs: **Coming Soon** Fleet/Fuel Card Processing

Concur is pleased to announce that – for clients who use the WEX Fleet Card (formerly the Wright Express Universal Fleet Card) – Concur will soon provide processing for fleet/fuel card transactions.

There will be three types of card programs:

- **Driver card:** Card assigned to a specific driver, to be used for all fleet/fuel transactions incurred by that driver in any vehicle

  The card accounts are assigned directly to the driver, who can see and manage the charges just like any other Corporate or Purchasing Card.
- **Vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver

  For these accounts, the driver must enter his/her driver ID at the pump or point-of-sale. Concur will import the card charges and – using the driver ID – route them to the appropriate Concur user (driver).
- **Managed vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver but all transactions are managed by a single client-defined driver/employee.

  The card accounts are assigned directly to the driver/employee, who can see and manage the charges just like any other Corporate or Purchasing Card.

Note the following:

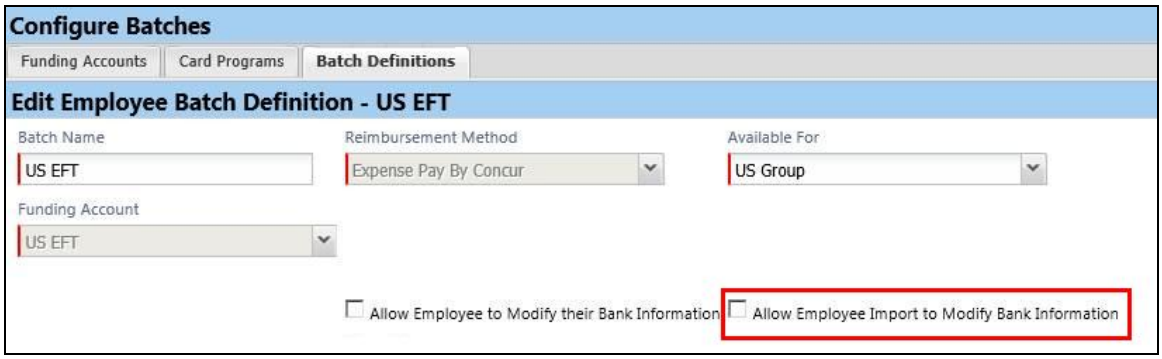
- This is a no-fee service available only to clients who use WEX Fleet Card (formerly the Wright Express Universal Fleet Card). Additional fleet cards will be available in the future.
- The fleet/fuel transactions appear to the user in Expense just like other card charges.
- The introduction of the Fleet/Fuel Card Processing feature is targeted for March. More information will be available in the March release notes.

Section 2: Expense Pay

Payment Manager: Bank Account Import Setting Moved

Overview

Concur has moved the final Expense Pay setting from the Reimbursement Manager user interface into Payment Manager. The **Allow Employee Import to Modify Bank Information** check box now appears on the **Batch Definitions** tab. The setting now applies to the group specified in the batch definition, allowing the administrator to set it for individual groups instead of globally.



BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides greater control over the employee import bank information setting.

Configuration / Feature Activation

This feature is automatically on. There are no additional configuration steps to activate or configure this feature.

NOTE: This setting is no longer available in Reimbursement Manager (classic user interface).

Expense Pay: Card Program Support is Expanded

Overview

Expense Pay now supports the following Bank of America corporate card programs:

- MasterCard Australia – Issued and paid in Australian dollars (AUD)
- MasterCard Hong Kong – Issued and paid in Hong Kong dollars (HKD)
- MasterCard India – Issued and paid in Indian Rupees (IND)
- MasterCard Singapore – Issued and paid in Singapore dollars (SGD)

NOTE: These card programs do *not* support negative payments.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement expands corporate card support in Australia, Hong Kong, India, and Singapore.

Configuration / Feature Activation

This feature is automatically on. There are no additional configuration steps to activate or configure this feature.

Feature Reminder

These features were introduced earlier this year. These are both valuable and handy and can save you, your company, and your users a significant amount of time and effort!

Section 1: Affidavit for Missing Receipt Image

Overview

The client can allow its users to *digitally* sign an affidavit for lost receipts for those times when receipt images are required but the user cannot find them. Using this feature, the report may be submitted in a timely manner and, at the same time, comply with company policy.

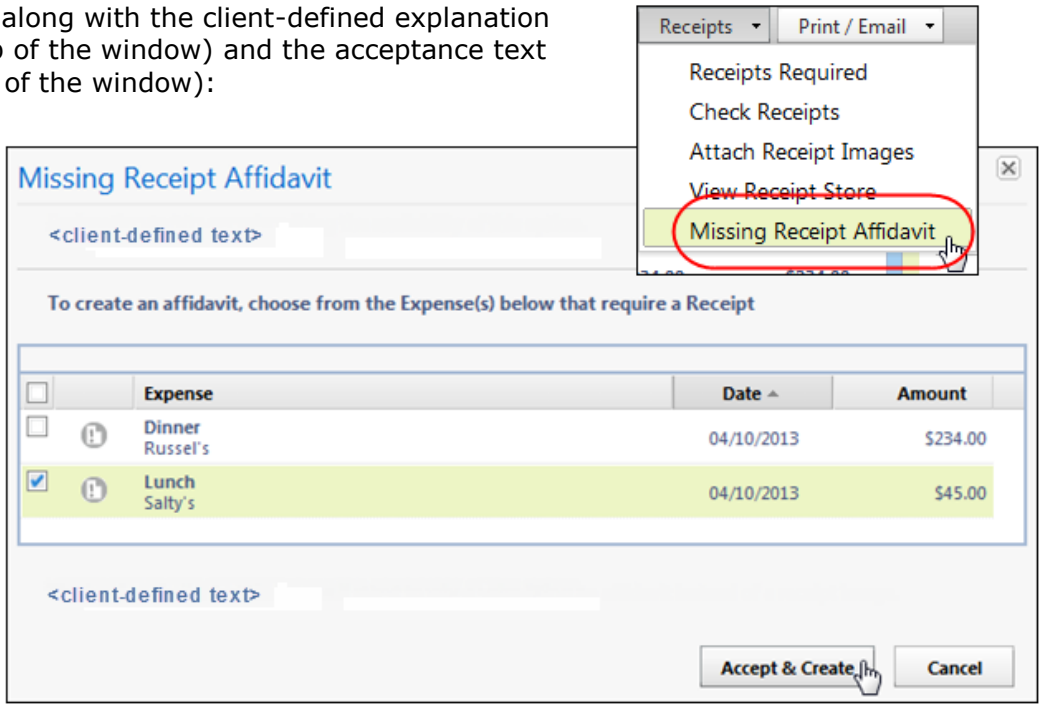
This option is electronic; it eliminates the paper process of printing and signing an affidavit and then attaching it to the report.

What the User Sees

NOTE: Note that only users can create the affidavit – delegates cannot.

Using the Affidavit

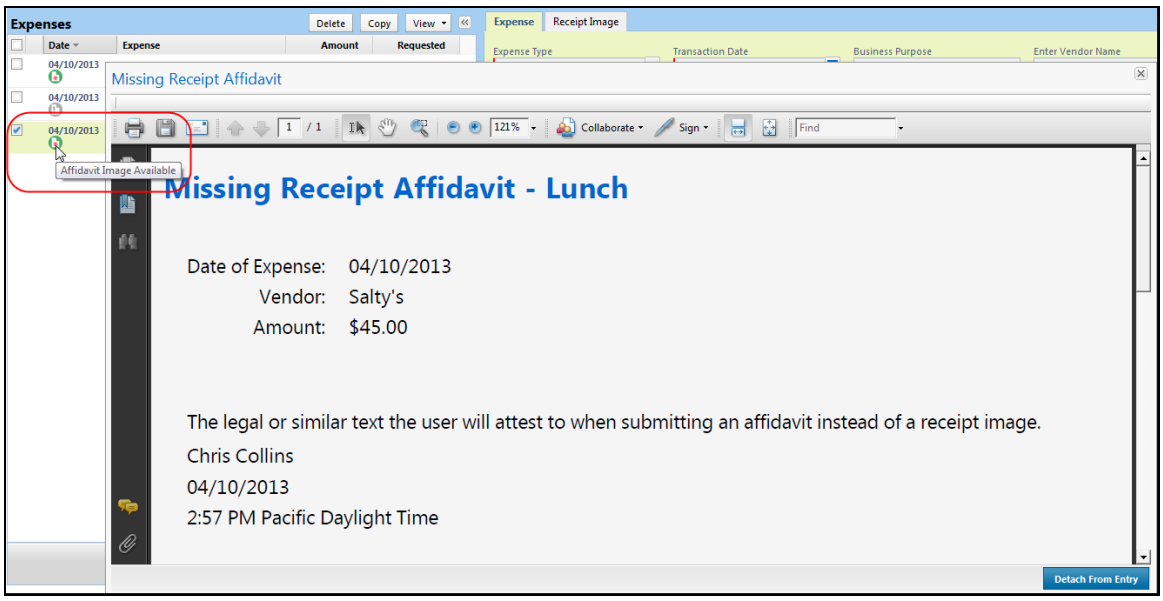
With the report open, the user clicks **Receipts** > **Missing Receipt Affidavit**. The **Missing Receipt Affidavit** window opens. The user sees the expenses that require receipts along with the client-defined explanation text (top of the window) and the acceptance text (bottom of the window):



The user selects each expense entry covered by the affidavit and then clicks **Accept & Create**. The system then:

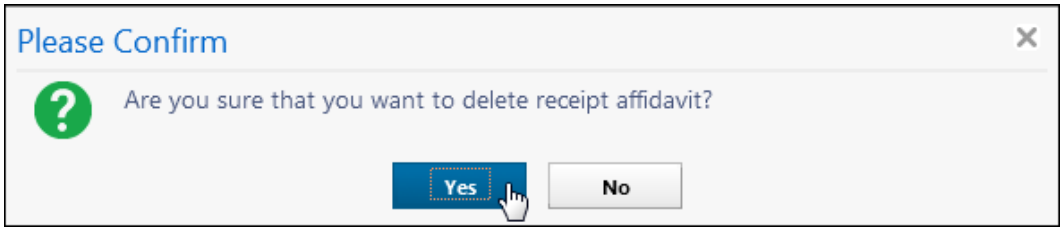
- Creates an image of the affidavit and attaches it to the selected entries
- Creates a record of the date, time, employee name, and other details for review purposes
- Sets a flag that may be referenced when creating audit rules to identify expense entries associated with an affidavit
- Displays a unique icon with each expense entry associated with the affidavit

By hovering over this icon, the user, approver, and processor can quickly review details of the affidavit:



Deleting and Replacing the Affidavit Receipt Image

If the correct receipt image is later found, the user simply hovers over the icon and clicks **Detach From Entry**.

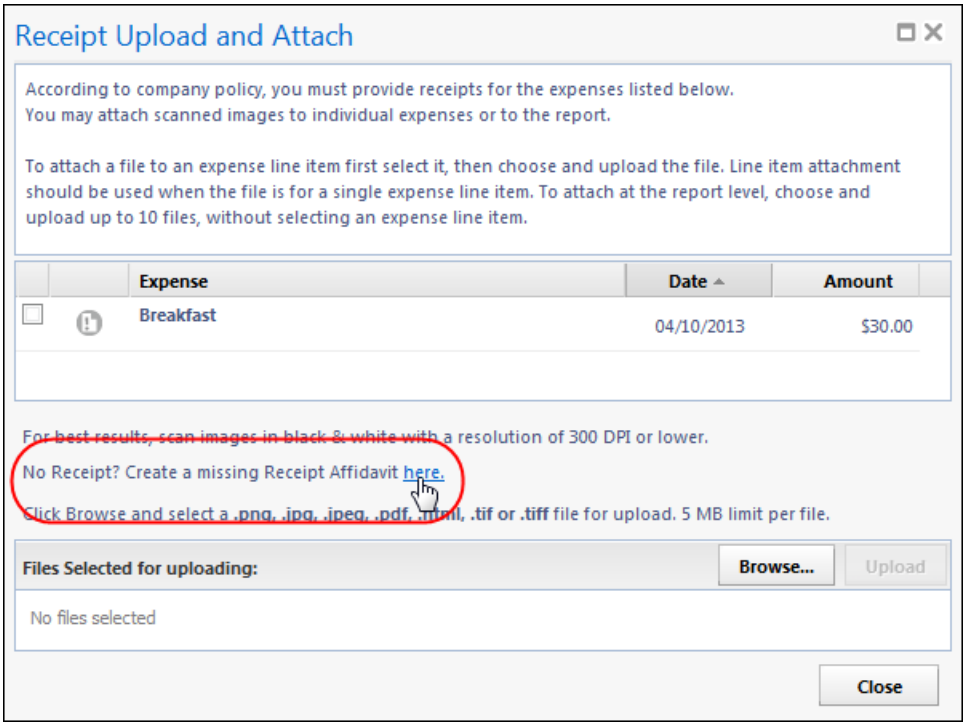


The affidavit and the flag are removed, returning the expense entry to its original state.

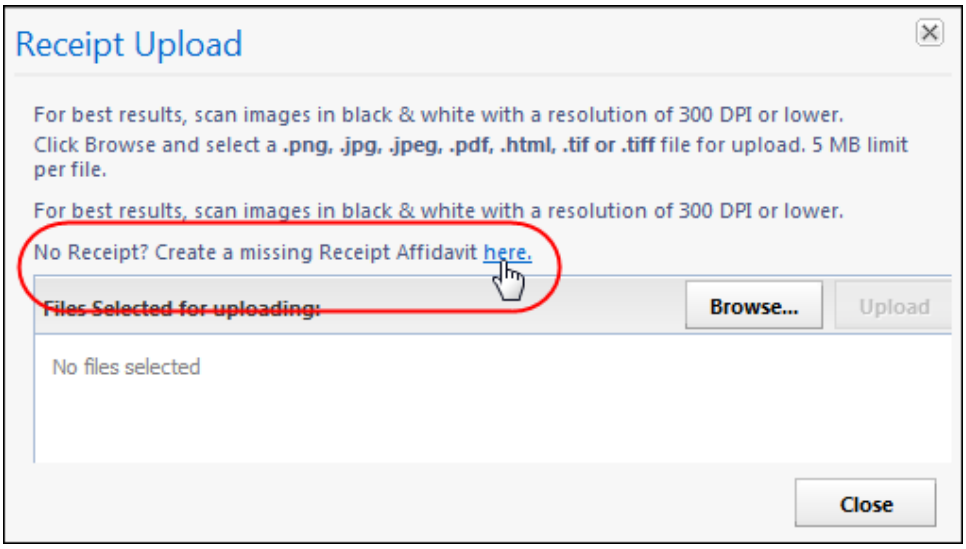
Additional Ways to Access the Affidavit Option

There are several ways to access the **Missing Receipt Affidavit** dialog box. As described above, the user can click **Receipts** > **Missing Receipt Affidavit**. In addition:

- **Receipts** > **Attach Receipt Images:** With the entry open, the user clicks **Receipts** > **Attach Receipt Images**.



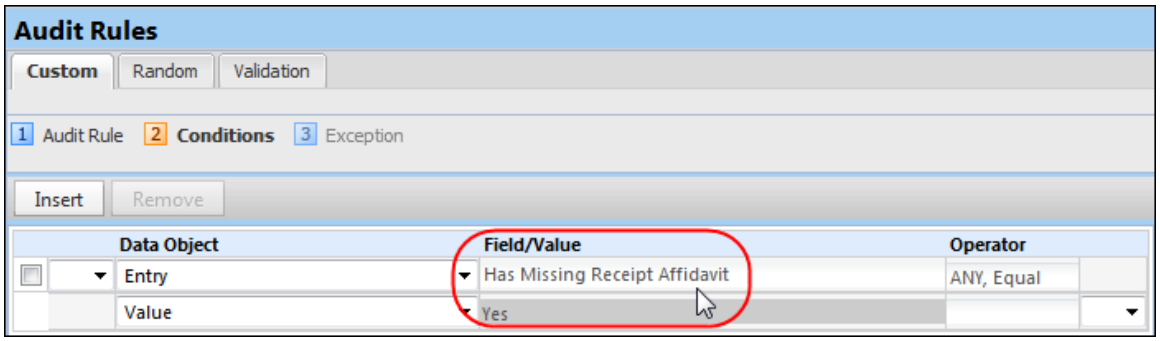
- **Receipt Store** > **Upload:** From the Receipt Store, the user clicks the **Upload** button.



- **Attach Receipt:** With entry open, the user clicks **Attach Receipt**.

A New Affidavit Audit Rule Option

The admin can use the **Has Missing Receipt Affidavit** audit rule field to detect expense entries associated with an affidavit. A sample audit rule is shown below:



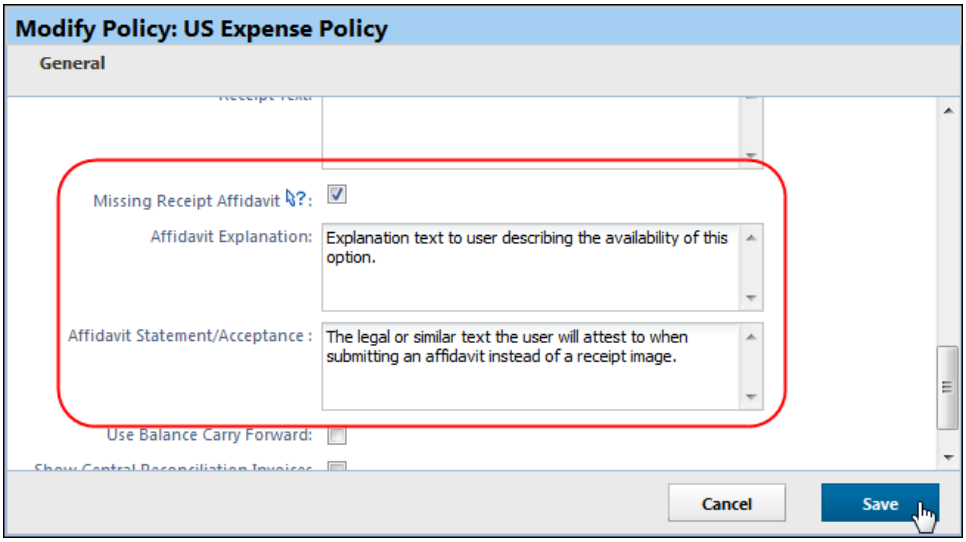
Configuration / Feature Activation

Clients wanting to use this feature must contact Concur Client Support for assistance.

Concur will follow the configuration/activation steps noted below.

To activate the Affidavit feature:

1. Click **Administration** > **Expense Admin** > **Policies**.
2. Select a desired policy and click **Modify**.
3. Scroll down and select (enable) the **Missing Receipt Affidavit** check box. Two additional fields appear.



4. Enter the explanation and statement/acceptance text.
5. Click **Save**.

Refer to *Expense: Policies Setup Guide* for more information.

Section 2: Delegate Can Email Receipts to the Receipt Store

Overview

Any delegate with a verified Receipt Store email address can send receipt images to the Receipt Store on behalf of a user (delegator). The user can later access those images in his/her Receipt Store repository and attach them to an expense report.

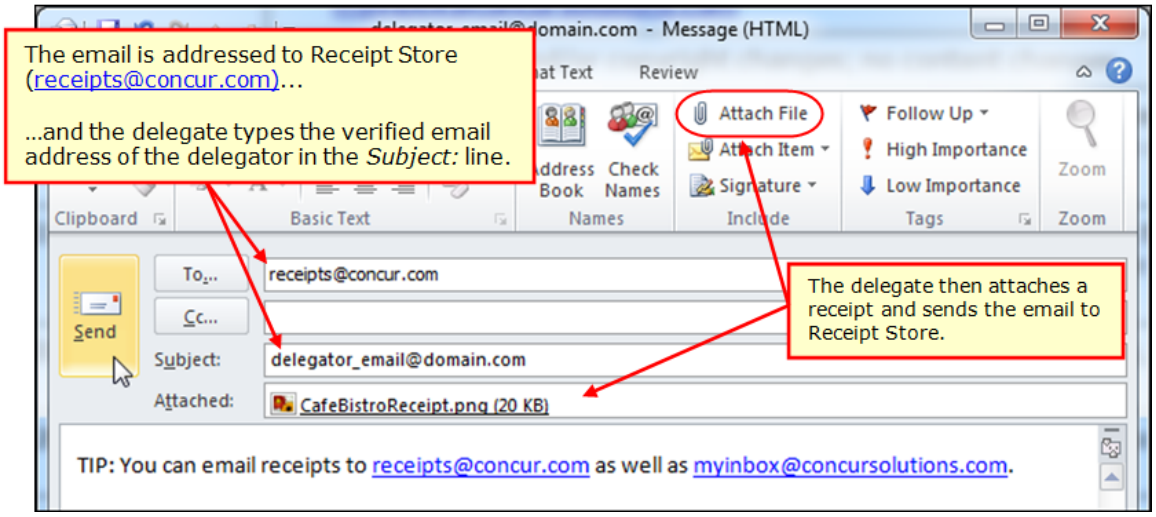
What the Delegate Sees

The delegate follows these steps.

NOTE: This process only works if the delegate is sending images for one of his/her designated users.

To send receipt images to the user's Receipt Store repository:

1. Prepare the email and attach or embed the receipt image.
2. Type the email address of the user (delegator) in the Subject line.
3. Send the email.



The system:

- Confirms that both the delegate and the user (delegator) have verified Receipt Store email addresses
- Confirms that a delegate-to-delegator relationship exists

Then:

- If ***both*** verification steps are found to be true, the image is added to the user's repository.
- If there is no valid relation between the delegate and delegator, the image is added to the *delegate's* repository.
- If the delegate does not have a verified email address, the email is discarded.

What the User Sees

Once the image appears on the user's Receipt Store repository, the user can attach the image as usual.

Configuration / Feature Activation

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

Supported Configurations

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

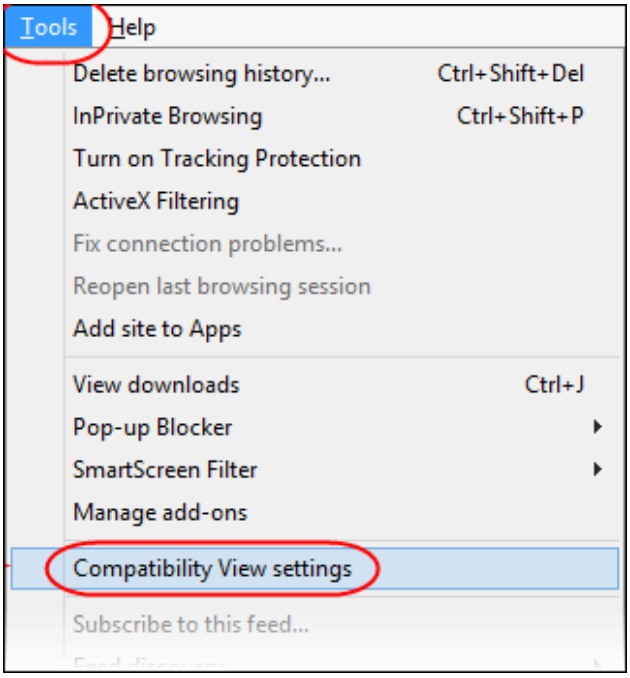
Overview

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.

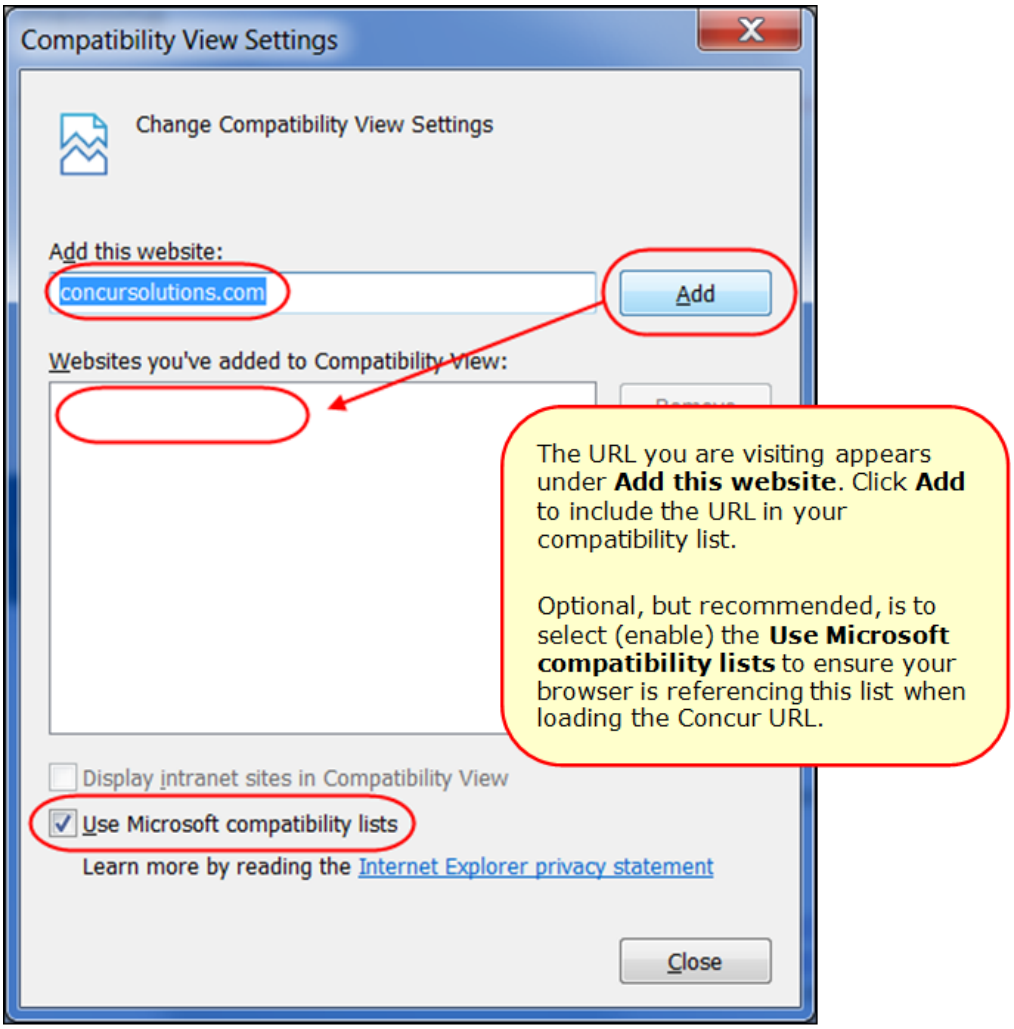
▸ ***To add Concur to your IE v. 11 compatibility list:***

1. In IE v.11, load the Concur page (for example, www.concursolutions.com).
2. Click **Tools** > **Compatibility View settings** to open the **Compatibility View Settings** dialog box.



Optional: If the **Tools** menu is not displayed, show this menu by pressing Alt.

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, Webinars, and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

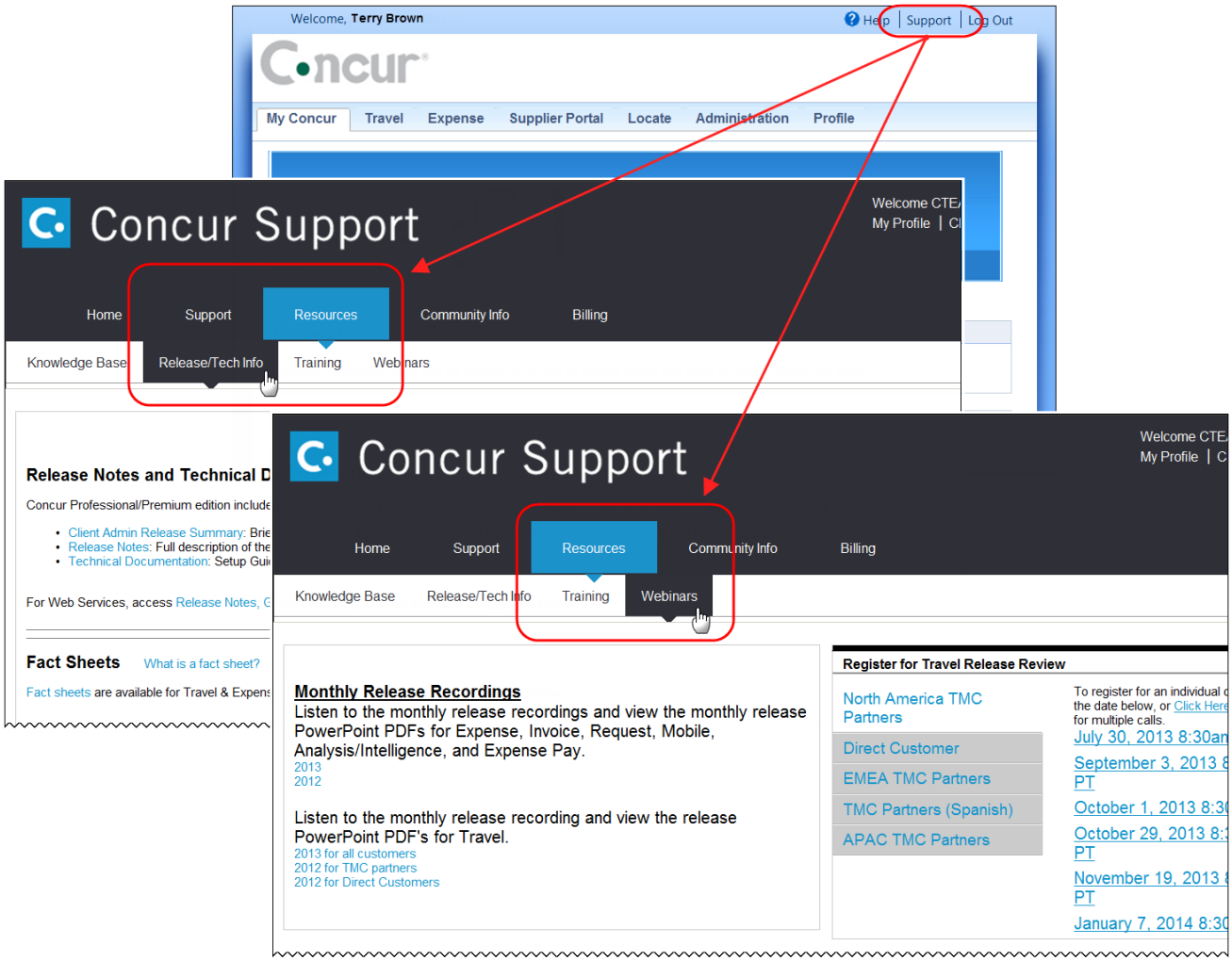
Additional Release Notes, Webinars, and Technical Documentation

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**.

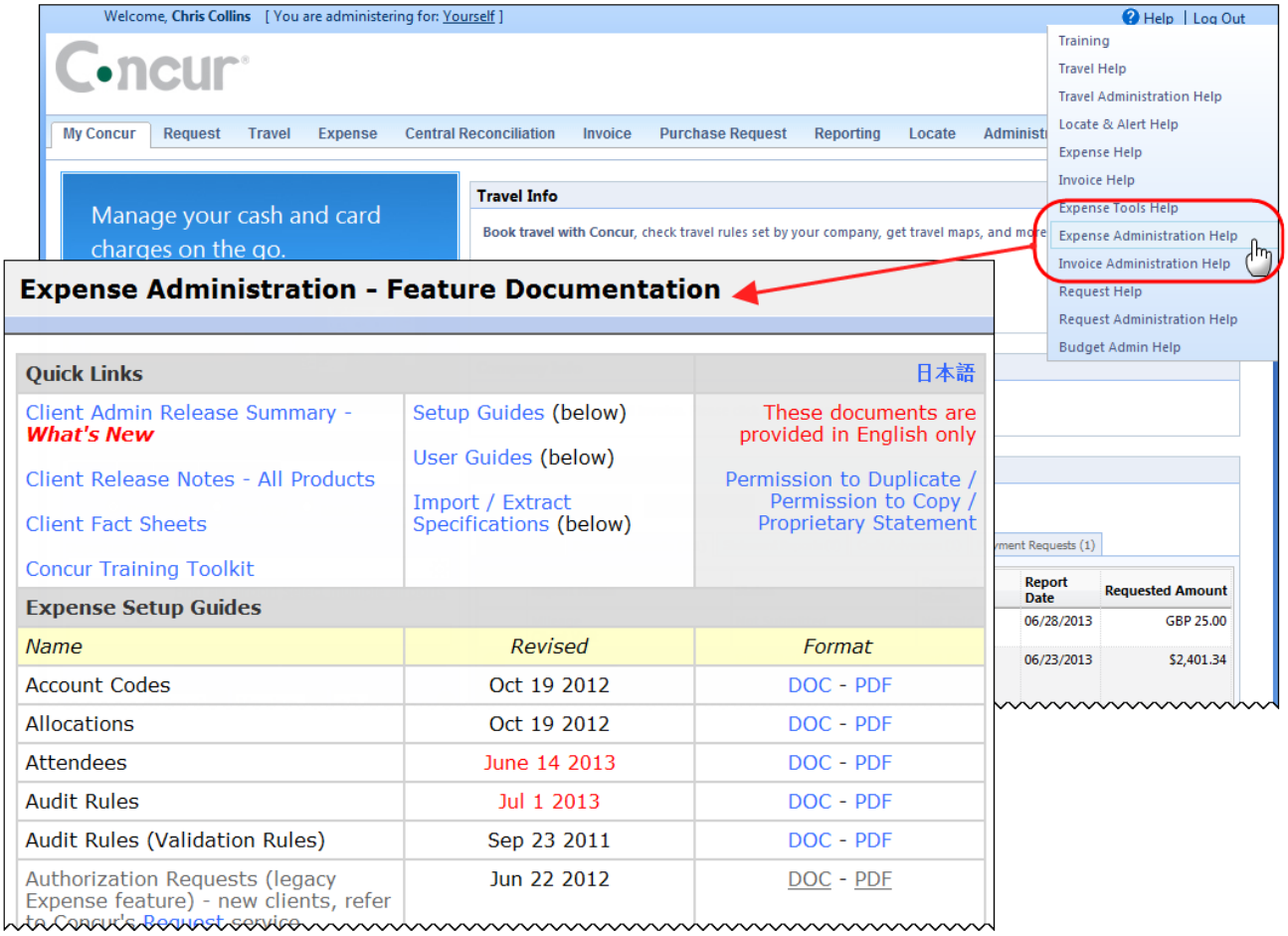
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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.



Concur Release Notes **Expense Professional / Premium** *Includes:* Expense, Imaging, Expense Pay, Expense Report Auditing, Jobs	
Month	**Audience**
March 2014 Initial post: Friday, March 07, 10:30 AM PT	*Client* - ***FINAL***

Contents

Release Notes

Section 1: Expense

Expense Approver: View Report Approved as Delegate

Overview

Currently, when a delegate – working on behalf of an approver – approves a report and then later wants to view that report, the delegate has to again be working on behalf of that same approver. That is, the approved report appears in the *approver's* list of approved reports, but not in the *delegate's* list of approved reports.

With this release, the approved report appears in both places.

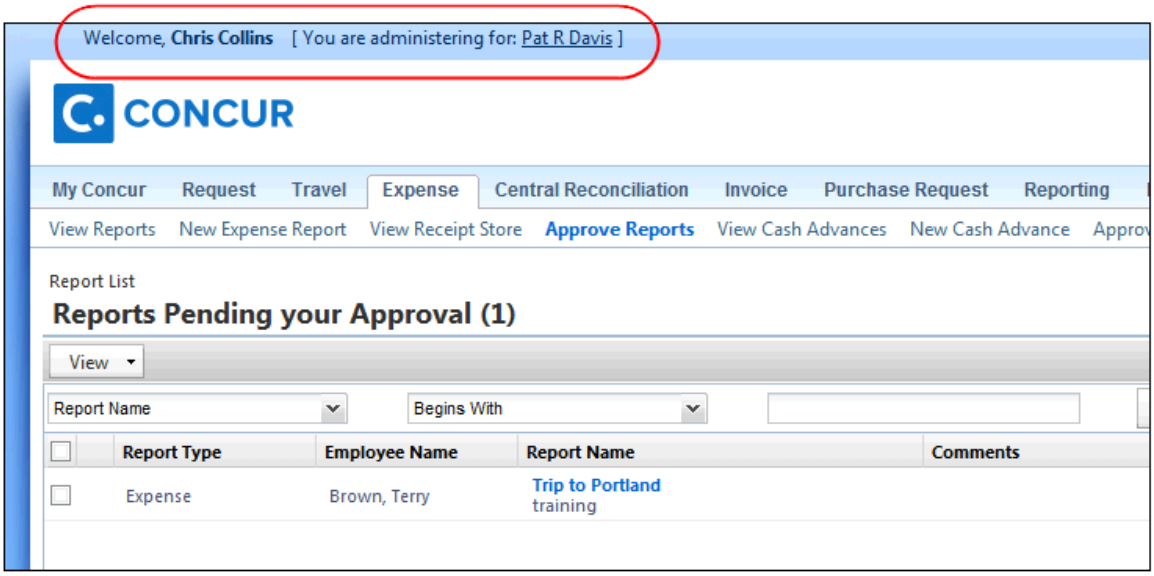
Based on a new site setting, the delegate approver can see all reports he/she approved – all in one place. When the delegate approver views the list of reports he/she approved – all approved reports appear, including those approved while working as a delegate.

BUSINESS PURPOSE / CLIENT BENEFIT

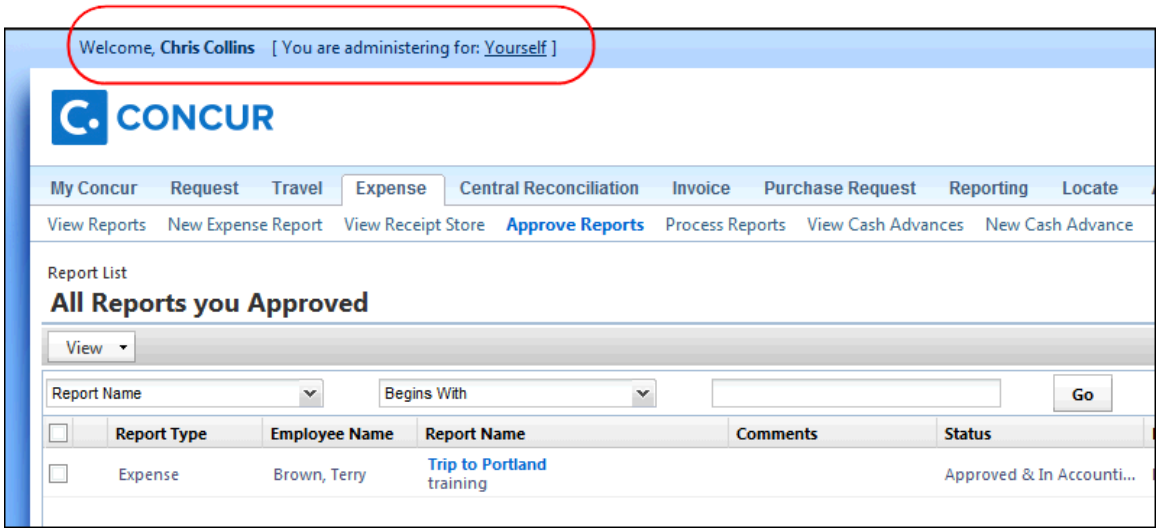
This feature provides easier access to approved reports for the delegate approver.

What the Delegate Approver Sees

In this example, Chris Collins is working as a delegate for Pat Davis. Chris approves the report from Terry Brown for a trip to Portland.



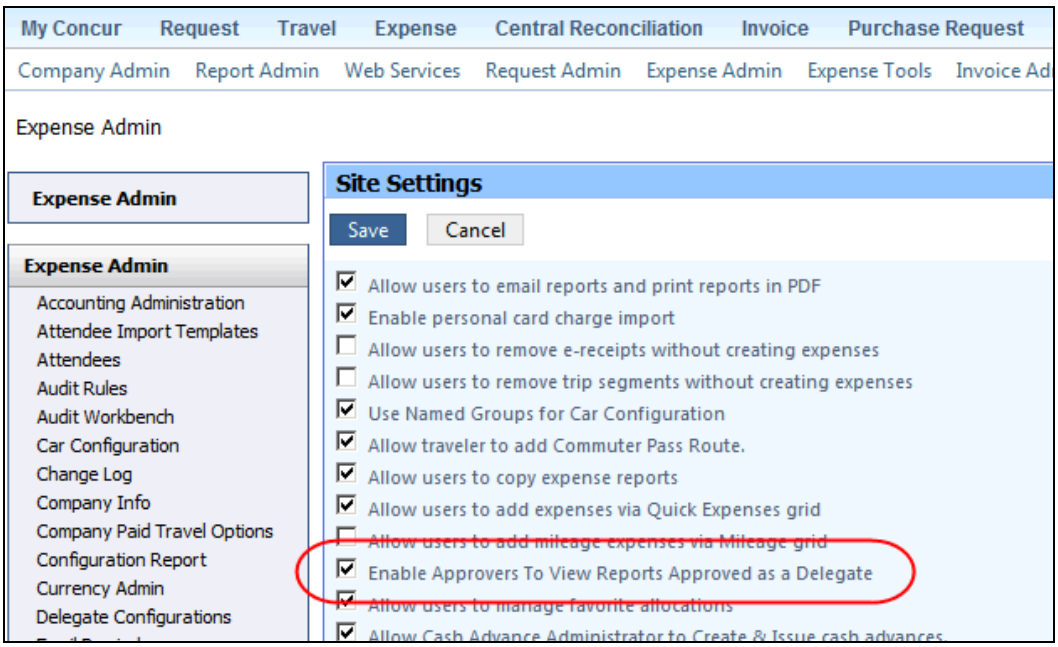
Later, Chris Collins – working as himself; not as a delegate – views the reports he has approved. Terry Brown's report appears in Chris's list of approved reports, even though he approved the report on behalf of Pat Davis.



Configuration / Feature Activation

To activate this feature:

1. Click **Administration** > **Expense Admin** > **Site Settings** (left menu).
2. Select (enable) the **Enable Approvers To View Reports Approved as a Delegate** check box.



3. Click **Save**.

Expense: Message for Auto-Created Expense Entries

Overview

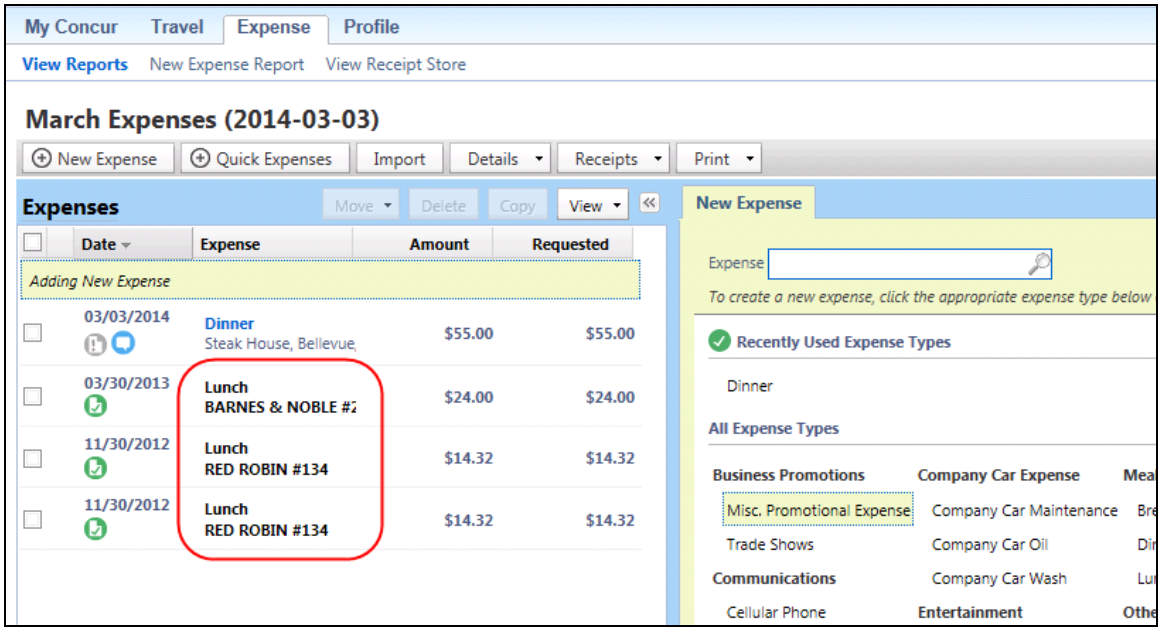
There are cases when expenses are created automatically by Concur. For example, if a client uses ExpenseIt, Concur uses an Optical Character Reader to read the user's receipt and then creates the associated expense entry. With this release, the auto-generated entries display in bold so the user knows which items to review.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides the notification for the user to review auto-created expense entries for accuracy.

What the User Sees

The auto-created entries appear in bold. Best practice is for the user to open and review the entries.



Configuration / Feature Activation

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

Cash Advance Admin: Send Back to Employee, New Buttons and Fields on Cash Advance Details Window

New Send Back to Employee Option

OVERVIEW

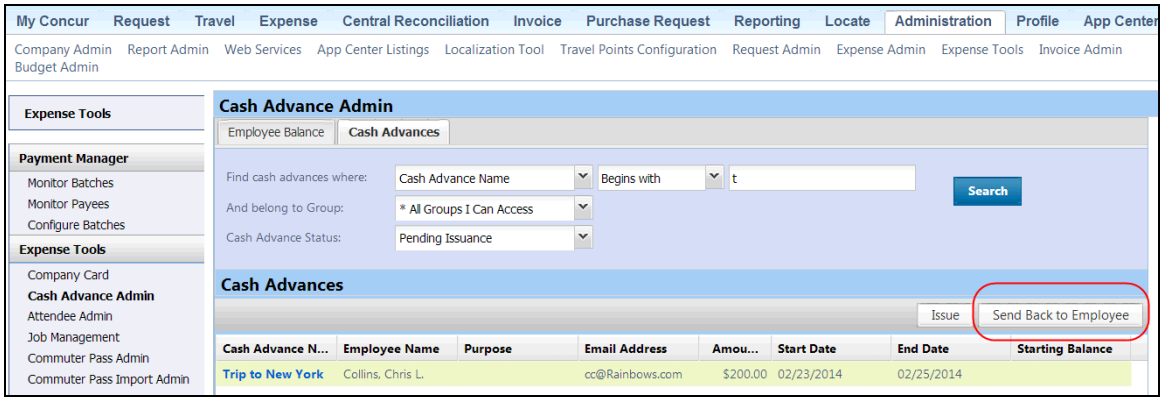
Currently, the Cash Advance admin can issue or not issue a cash advance. With this release, the **Do Not Issue** button has been replaced with the **Send Back to Employee** button so the admin can return the cash advance request to the user – for example, to change the amount or to provide more information.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows the user can provide the requested information (for example) and submit again – instead of having to create another request.

WHAT THE CASH ADVANCE ADMIN SEES

The new **Send Back to Employee** button appears on the **Employee Balance** tab, the **Cash Advances** tab, and the **Cash Advance Details** window.



CONFIGURATION / FEATURE ACTIVATION

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

New Buttons on the Cash Advance Details Window

OVERVIEW

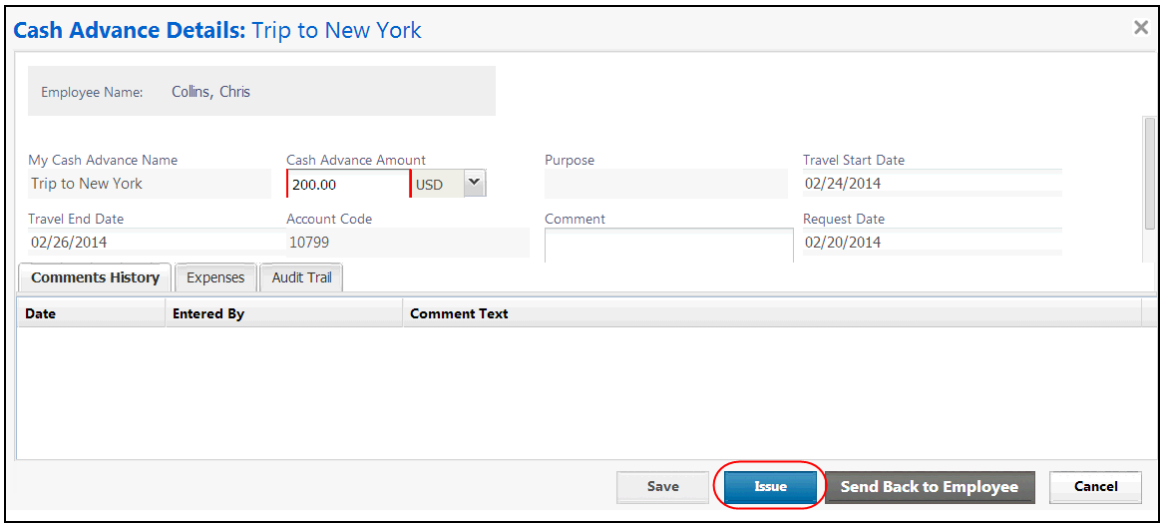
When the Cash Advance admin clicks a cash advance, the **Cash Advance Details** window appears. Currently, the **Issue** button does not appear in the **Cash Advance Details** window – the admin must return to the previous page in order to take action. With this release, the **Issue** button appears on the **Cash Advance Details** window, along with the new **Send Back to Employee** button.

BUSINESS PURPOSE / CLIENT BENEFIT

Without having to return to the previous page to take action, the Cash Advance admin's processing steps are streamlined.

WHAT THE CASH ADVANCE ADMIN SEES

The **Issue** button appears in the **Cash Advance Details** window.



CONFIGURATION / FEATURE ACTIVATION

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

New Fields for Cash Advance Admin

OVERVIEW

Recently, new cash advance fields were exposed and added by default to the cash advance request form. With this release, those fields will be available on the Cash Advance admin issuance form as well.

BUSINESS PURPOSE / CLIENT BENEFIT

Without having to return to the previous page to edit a field, the Cash Advance admin's processing steps are streamlined.

CONFIGURATION / FEATURE ACTIVATION

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

Attendees: Changes for Employee (SYSEMP) Attendee Records

Overview

The Employee (SYSEMP) attendee type is used to automatically add employees to a client's attendee list – so users can quickly find other employee attendees. In some cases, company requirements drive the creation of user accounts for people who are not employees of the company, such as contractors.

For several reasons, including regulatory and client requirements, there must be a way to clearly define the precise and correct attendee type for the user who is ***not*** an employee.

With this release, enhancements have been made so that clients can use a new profile (employee) field to indicate which users are not employees. Users who are ***not*** employees will:

- Not be automatically added to the Employee Attendee type
- Not be searchable via the Employee attendee type
- Not be automatically added as an attendee for an expense type configured to do so for employees

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides a way for clients to accurately account for attendees and differentiate employee attendees from non-employees attendees.

What the User Sees

A user (employee) may notice that an attendee who is marked as a non-employee will no longer appear in the search results when searching for employee attendees.

Configuration / Feature Activation

CLIENT

Clients interested in using this feature must contact Concur Client Support for assistance. Concur will add the **Is Non Employee** field to the profile (employee form) as described below.

Then, the client can:

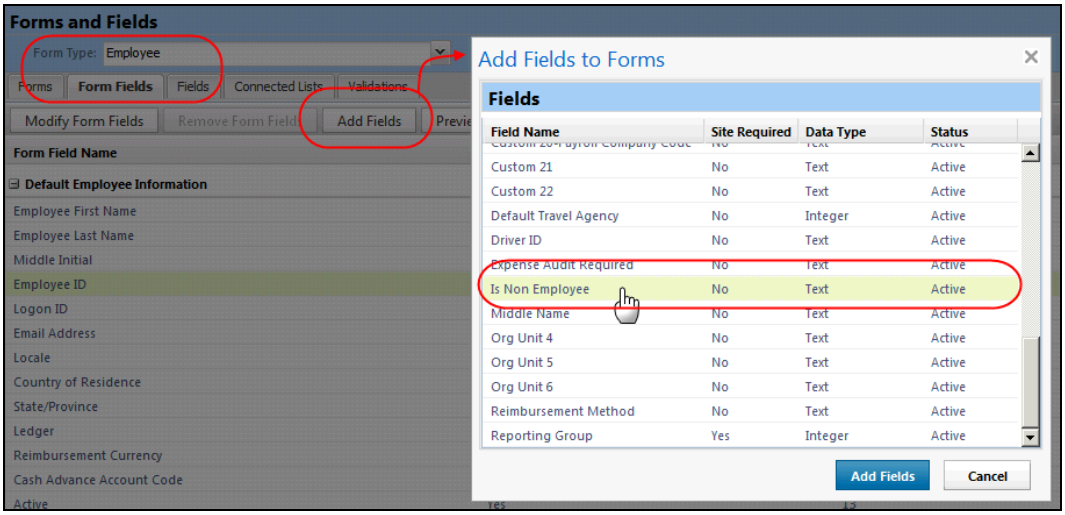
- Use its own internal resources to determine which Expense users are non-employees
- Access User Administration to select (enable) the **Is Non Employee** field for each non-employee

NOTE: The **Is Non Employee** field is not available in the user import.

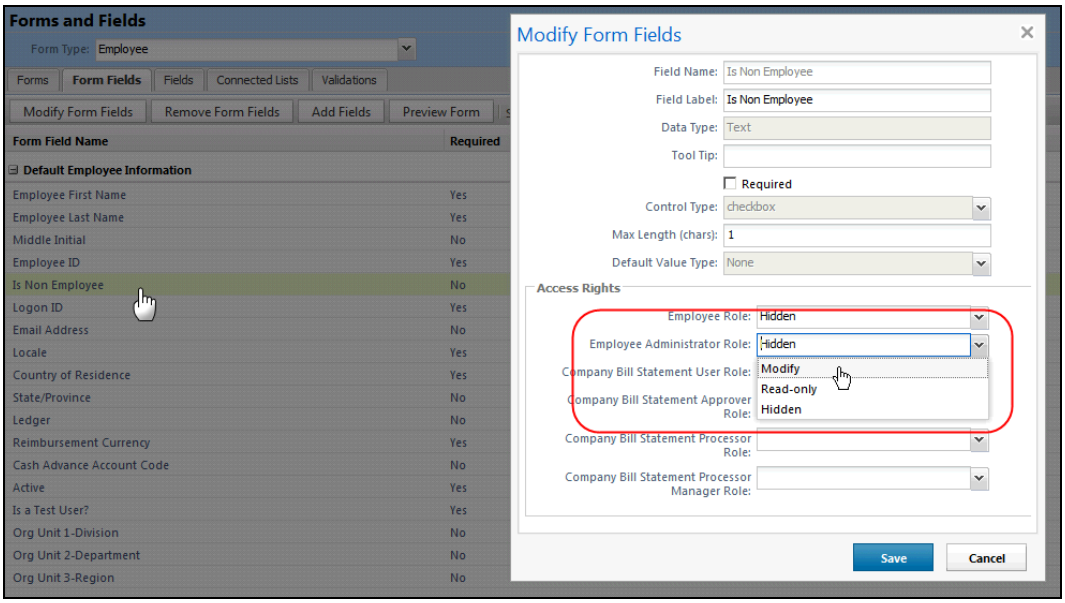
CONCUR

Concur will follow the configuration/activation steps noted below. The process is to add the new **Is Non Employee** field to the employee form and then make the field modifiable by the Employee Administrator.

1. Click **Administration** > **Expense Admin** > **Forms and Fields** (left menu).
2. In the **Form Type** list, click *Employee*.
3. Click the **Form Fields** tab.
4. Click **Add Fields**.



5. Select the **Is Non Employee** field.
6. Click **Add Fields**. The **Is Non Employee** field now appears on the employee form.
7. To ensure that the field is modifiable by the Employee Admin, double-click the **Is Non Employee** field. The **Modify Form Fields** window appears.



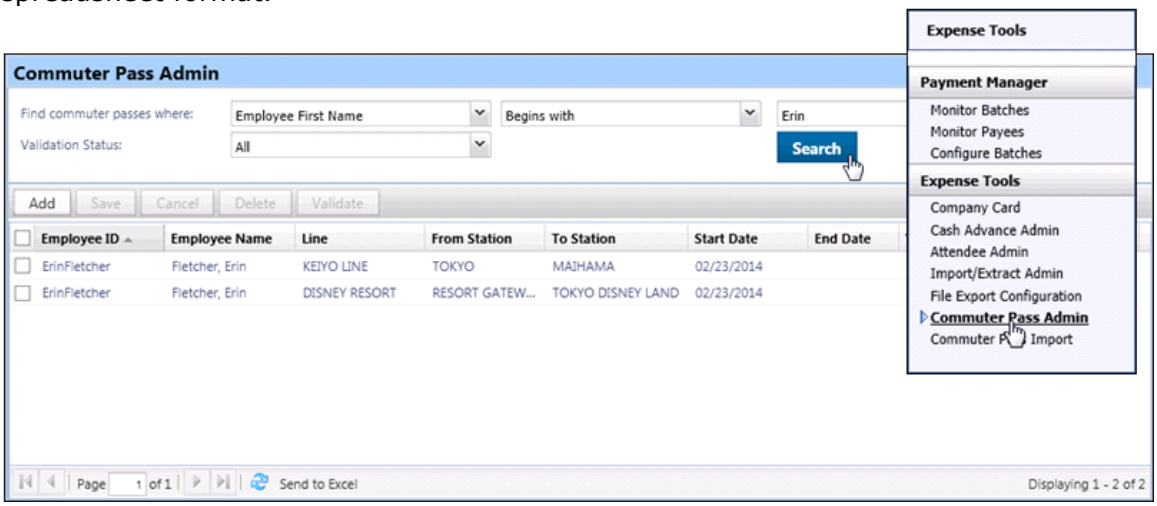
8. In the **Employee Administrator Role** list, click *Modify*.

9. Click **Save**.

Japan Public Transportation: Commuter Pass Admin Tool, Import

Commuter Pass Admin Tool to Work with Commuter Passes

The admin for Japan Public Transportation can now use options in the new Commuter Pass Admin tool to work with commuter passes. This includes searching for employees and working with their commuter pass dates, routes, and data in spreadsheet format.

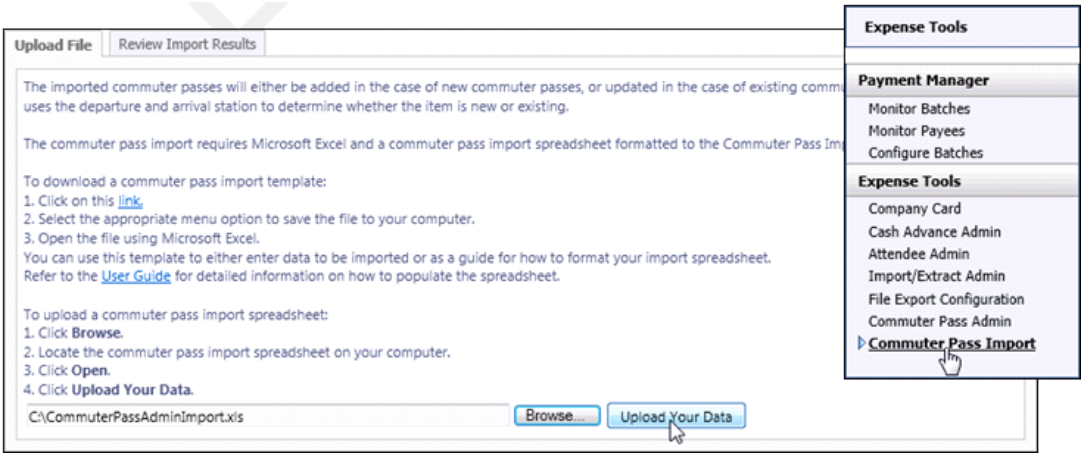


Click **Administration** > **Expense Tools** > **Commuter Pass Admin** (left menu) to display the new page.

Refer to *Expense: Japan Public Transportation User Guide* for more information.

Import Commuter Pass Information via Excel-Based Spreadsheet

A new Excel-based spreadsheet import is available for adding commuter pass routes on behalf of your employee. Each commuter route record is imported into the system with a *Pending Validation* status, and is validated by the Jorudan rail service when the admin selects and validates the route using the Commuter Pass Admin tool.



This import functions as others in Expense, with a downloadable spreadsheet and a link to documentation explaining the feature. Click **Administration** > **Expense Tools** > **Commuter Pass Import** (left menu) to display the new page.

Refer to *Expense: Japan Public Transportation User Guide* for more information.

Section 2: Expense Pay

Excel User Import Honors Employee Bank Information Setting

Overview

The **Allow Employee Import to Modify Bank Information** setting on the **Batch Definitions** tab of Payment Manager allows the administrator to set whether the employee import can update a user's bank information by group (determined by the batch definition). In this release, the Excel User Import has been updated to use this setting when determining whether to update a user's bank information during the import.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement supports the employee import bank information setting.

Configuration / Feature Activation

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

Section 3: Concur Analysis/Intelligence

New Name, New Menu Options

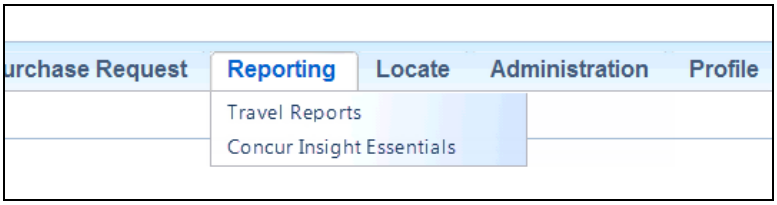
Overview

With this release, the name of *Concur Analysis/Intelligence* will change to *Concur Insight*.

What the Report User Sees

In Expense:

- **Analysis:** Clients who use *Analysis* will see the new name – *Concur Insight Essentials* – on the **Reporting** menu.



- **Intelligence:** Clients who use *Intelligence* will see no change on the **Reporting** menu.

Configuration / Feature Activation

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

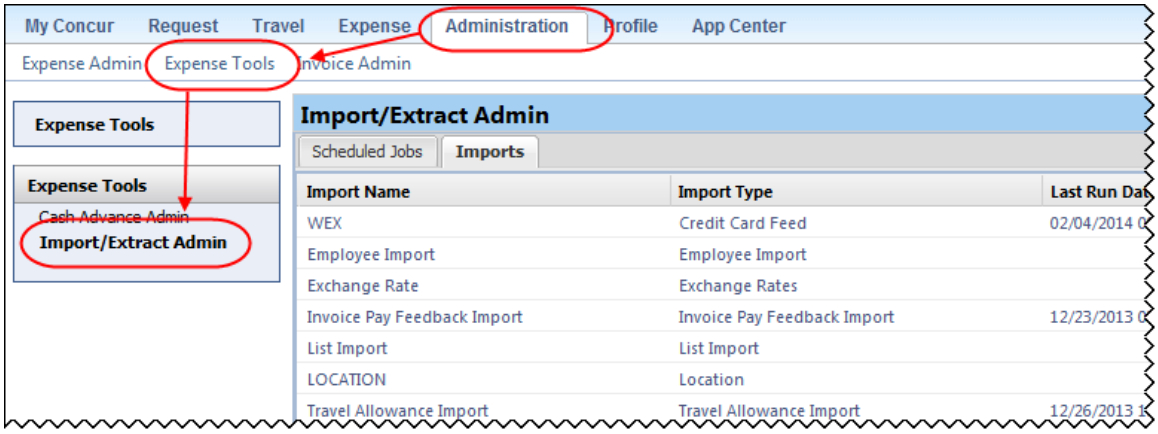
Section 4: Coming Soon

Coming Soon Import/Extract Admin

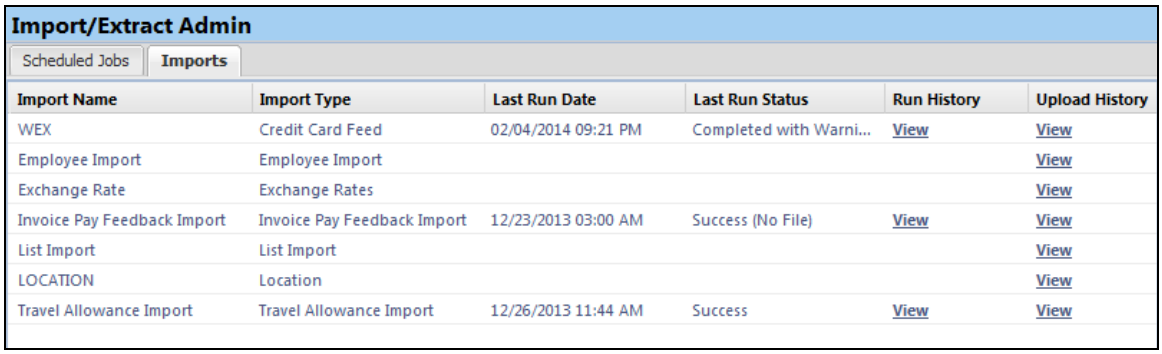
In an upcoming release, changes will be made to the Integration Administrator pages, which still reside in Concur's classic user interface.

First, it will move to Concur's current user interface and, second, the name will change to Import/Extract Admin to better reflect its functionality.

Import/Extract Admin will be available in **Administration** > **Expense Tools**.



As usual, users with the Import/Extract Admin role will be able to view information about scheduled jobs and import runs.



More information will be available in a future release.

Coming Soon New Fleet/Fuel Card Program

Concur will soon provide – for clients who use the WEX Fleet Card (formerly the Wright Express Universal Fleet Card) – processing for fleet/fuel card transactions.

There are three types of card programs:

- **Driver card:** Card assigned to a specific driver, to be used for all fleet/fuel transactions incurred by that driver in any vehicle

  The card accounts are assigned directly to the driver, who can see and manage the charges just like any other Corporate or Purchasing Card.

- **Vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver

  For these accounts, the driver must enter his/her driver ID at the pump or point-of-sale. Concur will import the card charges and – using the driver ID – route them to the appropriate Concur user (driver).

- **Managed vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver but all transactions are managed by a single client-defined driver/employee

The card accounts are assigned directly to the driver/employee, who can see and manage the charges just like any other Corporate or Purchasing Card.

Note the following:

- This is a no-fee service available only to clients who use WEX Fleet Card (formerly the Wright Express Universal Fleet Card). Additional fleet cards will be available in the future.
- The fleet/fuel transactions appear to the user in Expense just like other card charges.

More information will be available in a future release.

Section 5: Supported Configurations

Monthly Browser Certifications

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

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

Additional Release Notes, Webinars, and Technical Documentation

Concur Support Portal

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

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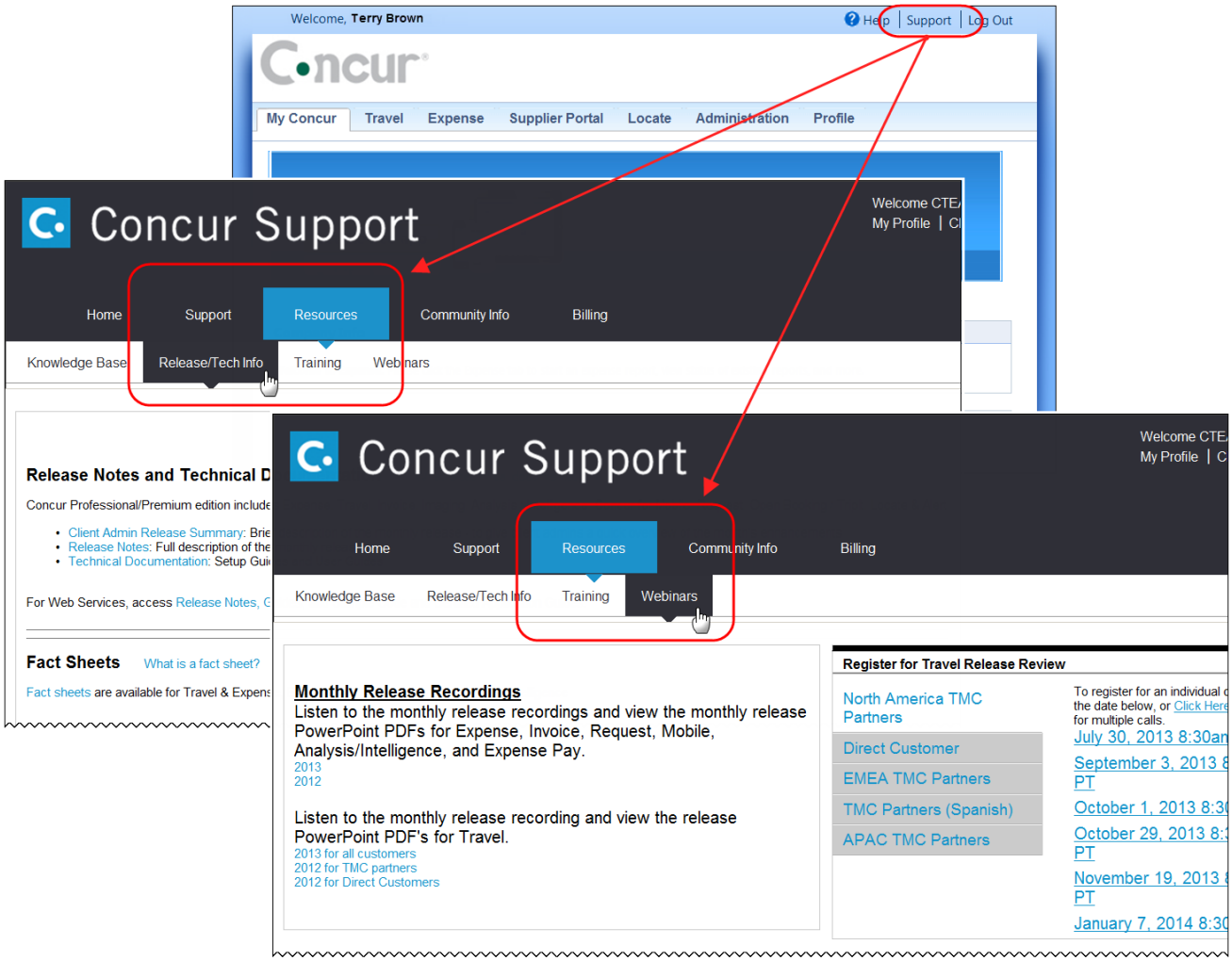
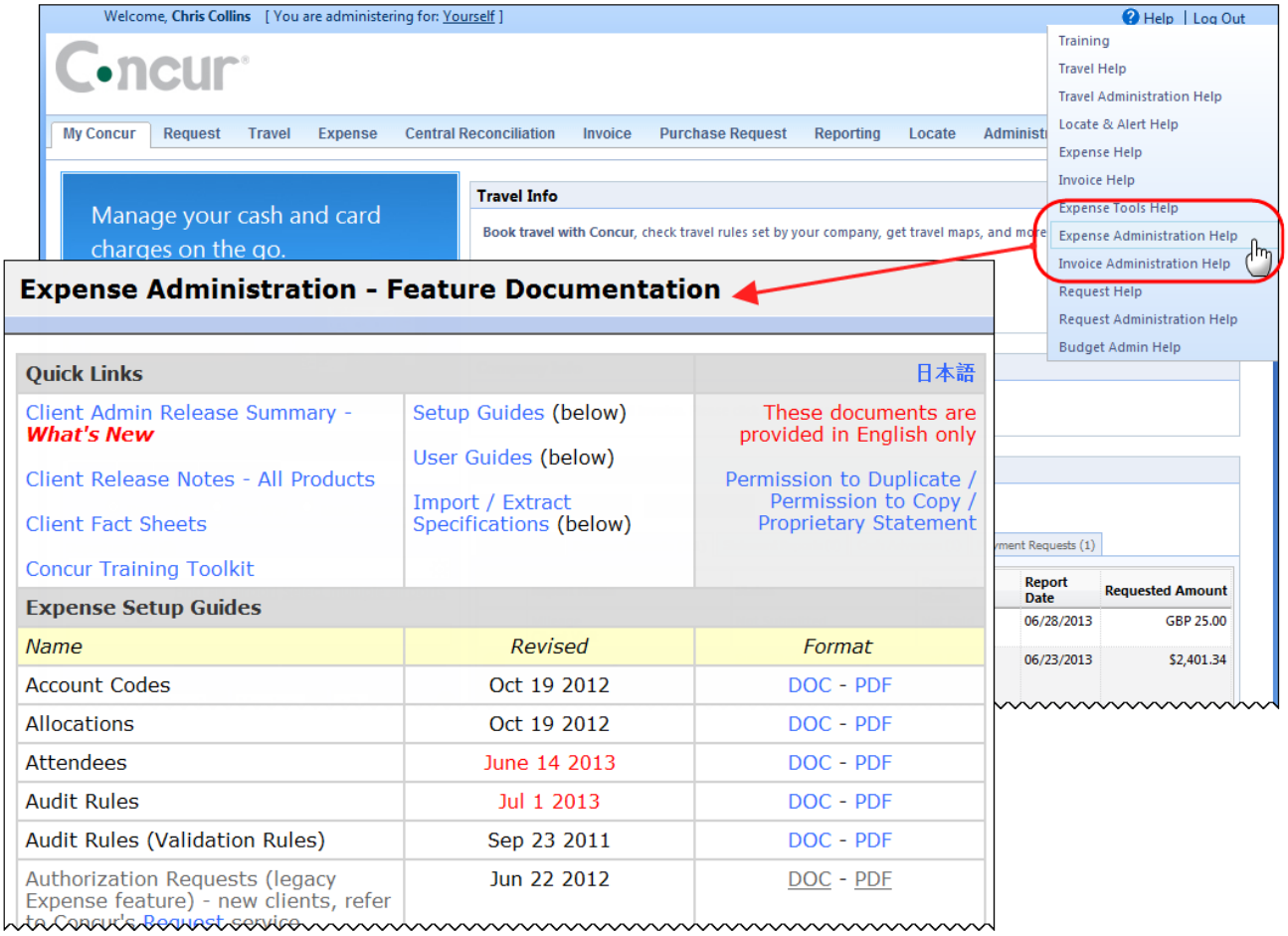


NOTE: If you use a user interface layout ***other than*** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

Online Help – Admins

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



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Concur Release Notes **Expense Professional / Premium** *Includes:* Expense, Imaging, Expense Pay, Expense Report Auditing, Jobs	
Month	**Audience**
April 2014 Initial post: Thursday, April 10, 7:00 PM PT	Client - ***FINAL***

Release Notes

Section 1: Expense

Expense Approver: New Previous/Next Report Buttons

Overview

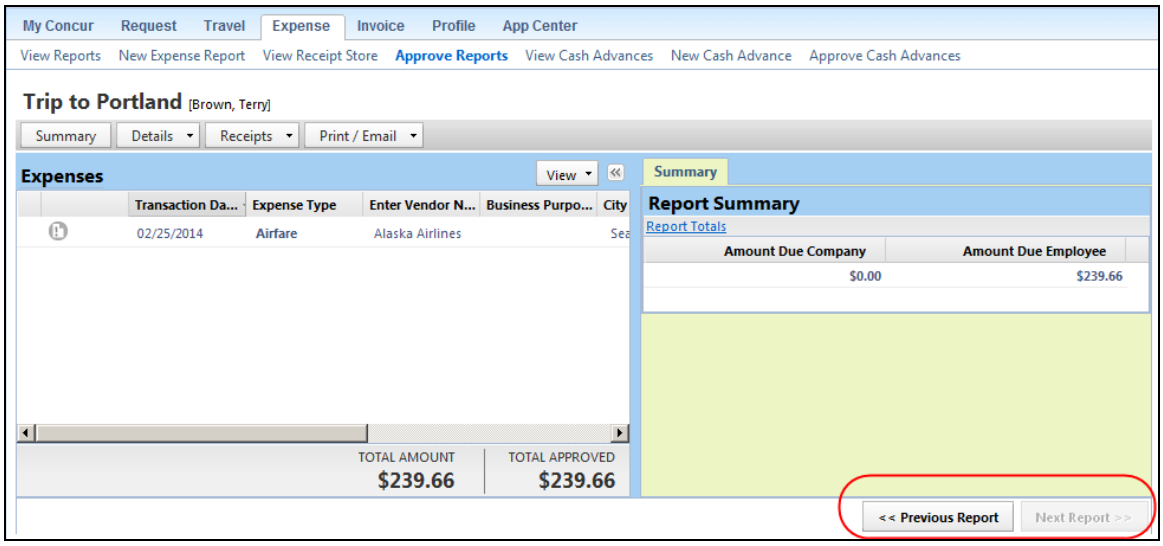
With this release, **Next Report** and **Previous Report** buttons appear at the bottom of the approver's view of the expense report page. These buttons appear for all previously approved reports, when the approver is reviewing historical data. They do ***not*** appear for reports pending review, where the approver needs to take action to approve or return the report.

BUSINESS PURPOSE / CLIENT BENEFIT

For approvers, these new buttons makes navigating through expense reports much easier and the review of historical data faster.

What the Approver Sees

The Expense approver clicks the **Next Report** or **Previous Report** button to navigate quickly through historical reports.



Configuration / Feature Activation

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

Travel Allowance: Custom Text to Prompt User

Overview

When configuring travel allowances, the client can elect to launch the travel allowance wizard automatically, to *not* launch the wizard at all, or to prompt the user – asking if he/she wants to use the wizard. The prompt that appears is: *Will this report include travel allowance expenses?*

With this release, the client can customize the prompt text.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows clients to instruct their users about how and when to use the wizard.

What the User Sees

The user sees the client-provided prompt. If the client elects to not modify the default text, then the default prompt *Will this report include travel allowance expenses?* appears.

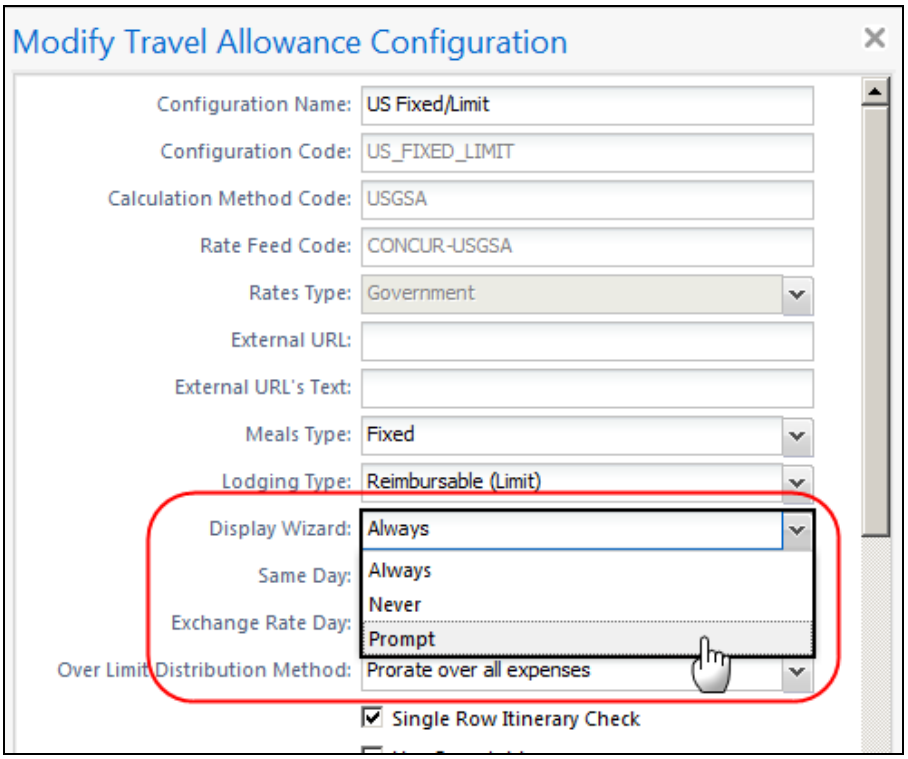
Configuration / Feature Activation

No action is required if you want to continue using the default text that is provided by Concur - *Will this report include travel allowance expenses?*

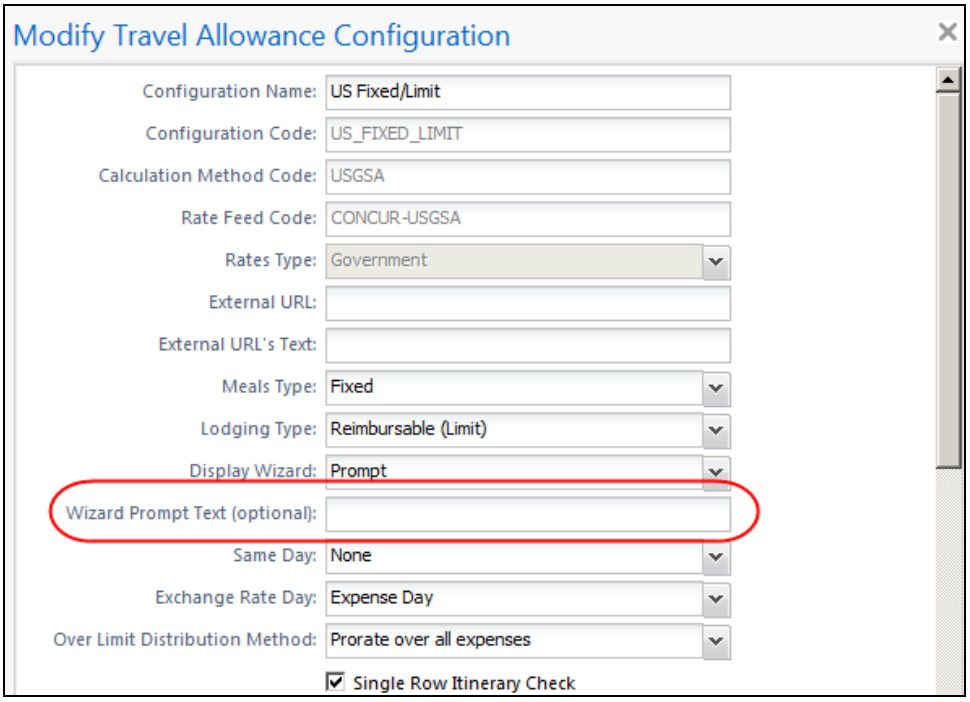
To modify the text presented to your users:

1. Click **Administration** > **Expense Admin** > **Travel Allowance** (left menu).
2. Either:
   - Click the desired configuration and then click **Modify**.
     – or –
   - Double-click the desired configuration.

   The **Modify Travel Allowance Configuration** page appears.
3. In the **Display Wizard** list, click *Prompt*.



The **Wizard Prompt Text (optional)** field appears.



4. Enter the desired text in the field. You can use letters, numbers, and symbols – with a maximum of 512 characters.

Integrated with Concur Request: Allocation Copy Down

Overview

A new setting has been added to close a small gap in the copy down process from Request allocations to Expense allocations. Currently, the client can configure Expense to copy down allocations from Request so that the Request allocations pre-populate the Expense allocation rows.

Example #1:

Assume the following:

- Request allocation fields include custom 1 through 4.
- Expense allocation fields include custom 1 through 4.
- Expense allocation form fields are configured to copy down from expense entry fields unless the report is associated with a request. If there is an associated request, then the expense allocation rows are pre-populated with data from the request allocation fields.
- Expense entry **Allocations** form field is configured to copy down from Request entry **Allocations** field. This copies the entire set of allocations to the expense entry.
- Expense is configured to copy allocations from the request to all entries on the report, not just those entries that are linked to a request entry (using the **Copy Down Unmatched Request Allocations** option in Expense Policy).

When the request is connected to the expense report, the information in Request allocation fields 1 through 4 is copied down into Expense allocation fields 1 through 4 for all entries on the report.

Example data:

Request entry allocations					**Resulting Expense entry allocations**				
50%	ABC	123	0012	A4	50%	ABC	123	0012	A4
50%	XYZ	234	0104	X5	50%	XYZ	234	0104	X5

Example #2:

Assume the same as above ***except*** Expense allocation fields include custom 1 through 5.

Currently, the information in Request allocation fields 1 through 4 is copied down into Expense allocation fields 1 through 4 and Expense allocation field 5 is left blank.

Request entry allocations					Resulting Expense entry allocations					
50%	ABC	123	0012	A4	50%	ABC	123	0012	A4	
50%	XYZ	234	0104	X5	50%	XYZ	234	0104	X5	

Using the new setting, the client can elect to have the remaining Expense allocation field 5 pre-populated as per the configuration, which, in this case, means field 5 is pre-populated with data from an expense entry field.

Request entry allocations					Resulting Expense entry allocations					
50%	ABC	123	0012	A4	50%	ABC	123	0012	A4	aa
50%	XYZ	234	0104	X5	50%	XYZ	234	0104	X5	aa

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides one more configuration option for clients to obtain the exact results they want and reduce errors and data entry by the user.

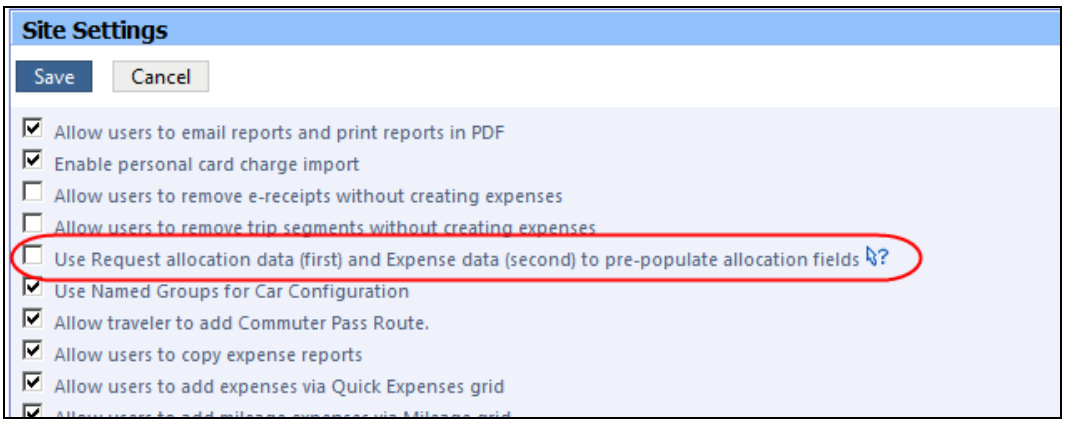
What the User Sees

The user will see that allocation fields are pre-populated.

Configuration / Feature Activation

To use this feature:

1. Click **Administration** > **Expense Admin** > **Site Settings** (left menu).
2. Select (enable) the **Use Request allocation data (first) and Expense data (second) to pre-populate allocation fields** check box.



Japan Public Transportation: Update End Date of Identical Pass Lines

Overview

With this release, whenever a commuter pass route is imported for a user that is an exact match of an existing route, the system will automatically replace the existing route's end date with the end date in the import. Doing this allows the admin to extend the use of existing routes simply by updating the end date.

The import must match in the following categories to add or overwrite the end date:

- Stations & Line
- Start Date value

BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows continuous update of existing commuter pass routes by updating the end date.

What the JPT Administrator Sees

The administrator for Japan Public Transportation will notice no change as the End Date field already exists in the Commuter Pass import. However, they will note that an end date, if specified in the import, is added to existing commuter pass routes lacking one, and overwrites this value for those routes that do have an end date.

Configuration / Feature Activation

The update is performed using the Commuter Pass on-demand import, which includes the End Date field as shown below.

Field	Format	Required	Definition
End Date	8 characters maximum in format *YYYYMMDD*	N	The end date (deactivated) of the commuter pass.

📖 Refer to *Expense: Japan Public Transportation Commuter Pass Import User Guide* for more information.

Japan Public Transportation: Email Notifications

Overview

With this release, all email notifications generated for users working in a Japan locale will display the name as Last Name, First Name. For example, "Suzuki, Hiro" or "Jones, Sarah".

Business Purpose / Client Benefit

This feature adopts the traditional Japanese name display for Concur products.

Configuration / Feature Activation

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

Section 2: User Admin

New Concur User: Automatic Email Option

Overview

If an admin adds a user manually, the admin can now send an email automatically to the new user. By default, the email contains login information but the admin can customize the email as needed.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature streamlines the process. The admin can send the email automatically – when adding the user – instead of having to create and send an email manually.

What the User Sees

The new user sees the email with the logon information and/or any other information the admin wants to include.

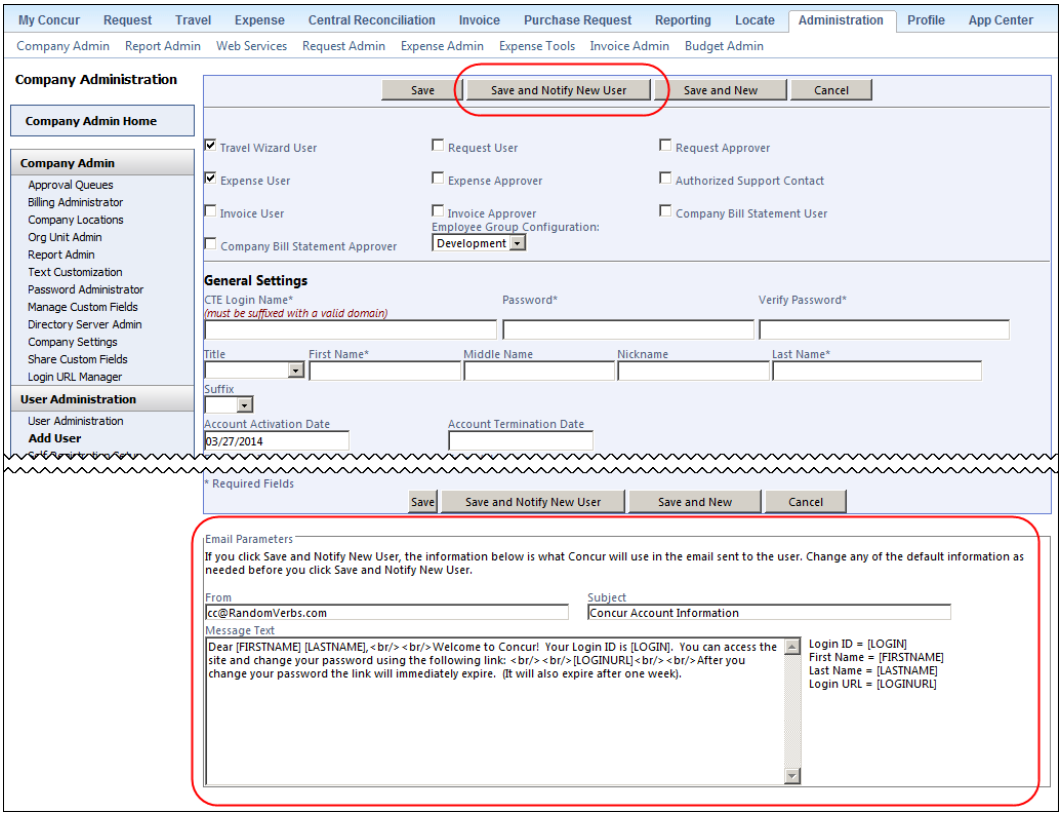
What the Admin Sees

To use the new feature:

1. Click either:
   - **Administration** > **Company Admin**> **Add User** (left menu)
     – or –
   - **Administration** > **Company Admin**> **User Administration** (left menu) > **Add New User**

2. Add the new user information as usual.

3. At the bottom of the page, review the information in the **Email Parameters** section.



4. Make any desired changes.

5. When done, click **Save and Notify New User**.

Note the following:

- The button and email section appear ***only*** for new employees. They are not available when the admin modifies existing user information.
- The default email information appears and the admin can edit the **From**, **Subject**, and **Message Text** portion of the email as desired.

NOTE: There is no mechanism to permanently edit the email text that appears by default. If the admin wants to make changes, he/she must change it for each new user.

Configuration / Feature Activation

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

Section 3: Credit Cards

Coming Soon New Fleet/Fuel Card Program

Concur will soon provide – for clients who use the WEX Fleet Card (formerly the Wright Express Universal Fleet Card) – processing for fleet/fuel card transactions.

There are three types of card programs:

- **Driver card:** Card assigned to a specific driver, to be used for all fleet/fuel transactions incurred by that driver in any vehicle

  The card accounts are assigned directly to the driver, who can see and manage the charges just like any other Corporate or Purchasing Card.
- **Vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver

  For these accounts, the driver must enter his/her driver ID at the pump or point-of-sale. Concur will import the card charges and – using the driver ID – route them to the appropriate Concur user (driver).
- **Managed vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver but all transactions are managed by a single client-defined driver/employee

  The card accounts are assigned directly to the driver/employee, who can see and manage the charges just like any other Corporate or Purchasing Card.

Note the following:

- This is a no-fee service available only to clients who use WEX Fleet Card (formerly the Wright Express Universal Fleet Card). Additional fleet cards will be available in the future.
- The fleet/fuel transactions appear to the user in Expense just like other card charges.

More information will be available in a future release.

Section 4: Expense Pay

Import: Japan Zengin Pay File Import Enhancements

Overview

Expense Pay clients in the Japan market have access to the Zengin Pay File, a bank extract. In the April release, this functionality has the following enhancements:

- The file now includes a Value Date, which is the payment due date established for use by the bank. The administrator can schedule the Value Date as part of the Batch Scheduling process, to be 0-31 banking days after the batch close date.
- The on-demand batches for the Zengin Pay File display a **Schedule Now** link instead of a **Close Now** link in Payment Manager. When closing/scheduling an on-demand batch, the admin is prompted to enter a Value Date. The date can be up to 31 days after the batch closes.
- The Value Date is automatically adjusted to the first banking day after a holiday or weekend if it lands on those days.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement supports the specifics of the Japan market.

Configuration / Feature Activation

This feature is only available to Expense Pay clients in the Japan market.

Guide: New Payment Manager Guide Now Available

Overview

Previously, the Payment Manager page was only available to clients with the Expense Pay service. Now some clients without Expense Pay have access to manage their payment batches using this page.

This release includes a new guide:

Expense: Payment Manager User Guide

This guide is available with the release documentation. The Payment Manager guide includes information on shared processes and Expense Pay specific processes. The Payment Manager information has been removed from the *Expense Pay User Guide*, and is now available in the *Payment Manager User Guide*.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides documentation for Payment Manager that is relevant to clients with and without Expense Pay.

Section 5: Imports and Extracts

Budget Insight: Load Your Budget Approvers Using Employee Import

Overview

Users of Budget Insight may now draw on the overnight Employee Import job to load Budget Insight approvers and approver details into the system. This feature complements the existing Excel-based import available in the user interface, and provides an alternate method for clients who need to work with the dates, amounts, and hierarchy nodes for multiple approvers at a time.

The new import records consist of:

- A new non-Group role called Budget Approver in the 400-level record set
- A new 730 record set Budget Approver Import
- A new 770 record set Delete Budget Approver Import

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides an alternate method for working with Budget Insight approvers at the client site.

What the Integration Administrator Sees

The Integration Administration role will now see the new fields and record sets in the overnight employee import job.

Configuration / Feature Activation

The feature is activated by using the correct record sets and associated fields to add an approver, specify their start and end dates, their hierarchical approval level (optional), and both the amount and currency they are authorized to approve.

NOTE: The user must already have the Budget Approver role assigned in the 400-level record set before assigning 730-level attributes.

Deleting a Budget Insight Approver

Please note that the Budget Insight Approver role can only be removed when that approver has no expense reports assigned to them through their Budget group or specified time period.

NOTE: The client will need to submit a Service Request to Support and work with a Concur administrator to create the employee import feed file.

Refer to *Chapter 5: Employee Import* of the *Expense – Import and Extract Specifications* manual for more information.

Integration Administrator: Available in the Current User Interface

Overview

Until now, the Integration Administrator tool resided only in Concur's *classic* user interface. With this release, a portion of the tool – the view-only display – is available in Concur's *current* user interface. In addition, the name has been changed to Import/Extract Admin to better reflect its functionality.

With this release:

- All ***view*** tasks are available in the old ***and*** new location.
- All other tasks (add, edit, etc.) must continue to be completed in the old location.

BUSINESS PURPOSE / CLIENT BENEFIT

For users who need to view the import or extract run information, access is now easier.

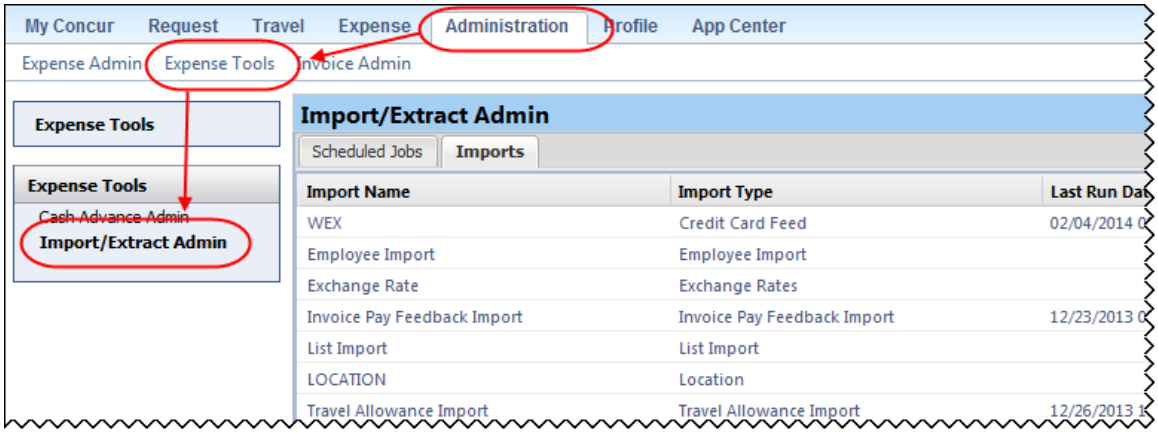
Roles

The role names have been updated to better reflect the role's actual permissions and the name of the tool.

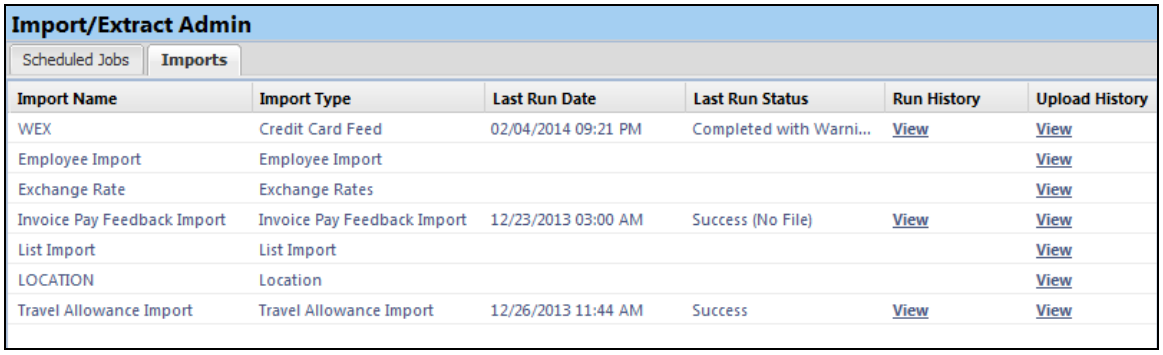
Current Role Name	Description	New Role Name
Integration Administrator (Restricted)	View-only client access to import/extract run information	*Import/Export Monitor*
Integration Administrator	Full access the import/extract processes	*Import/Export Administrator*

What the Admin Sees

The new Import/Extract Admin tool is available via **Administration** > **Expense Tools** > **Import/Extract Admin**.



Users with the *Import/Extract Monitor* role can view information about scheduled jobs and import runs.



Users with the *Import/Extract Administrator* role can use the new tool to view job data but must use the classic user interface to complete all other tasks (until the remaining portion of the tool is moved to the current user interface).

Configuration / Feature Activation

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

Section 6: Supported Configurations

Monthly Browser Certifications

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

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

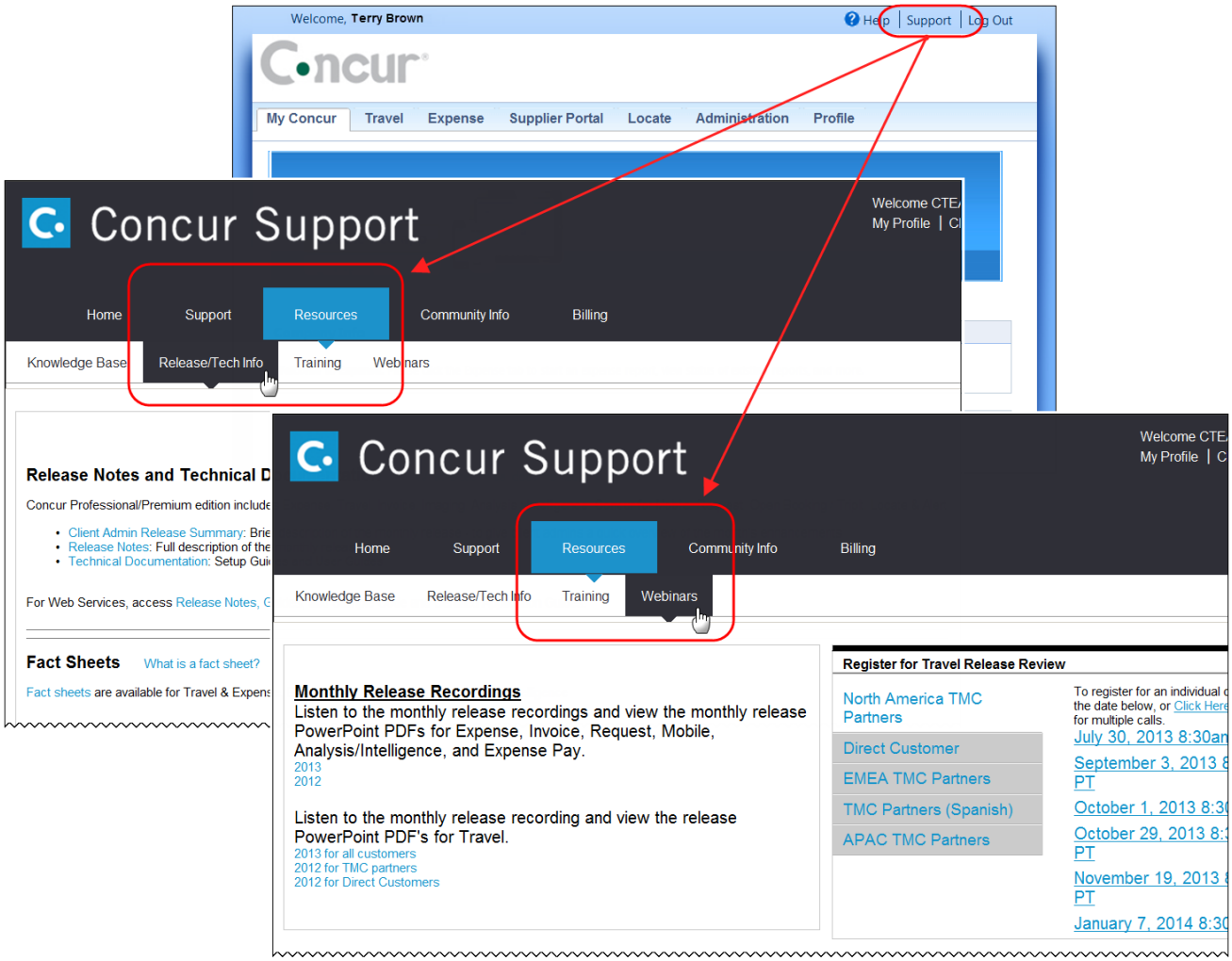
Additional Release Notes, Webinars, and Technical Documentation

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**.

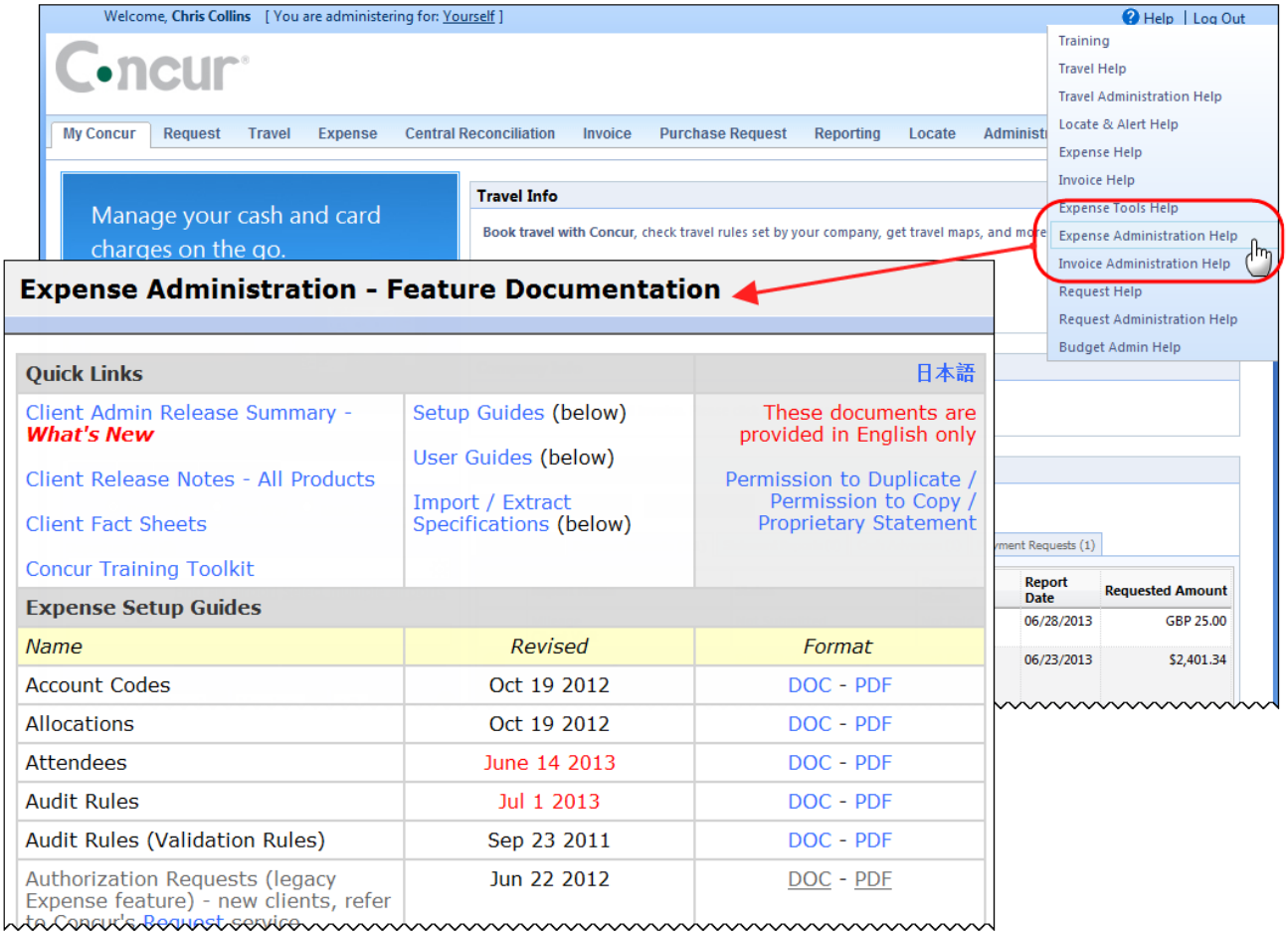
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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.



Concur Release Notes **Expense Professional / Premium** *Includes:* Expense, Imaging, Expense Pay, Expense Report Auditing, Jobs	
Month	**Audience**
May 2014 Update #3: Friday, December 4 2015, 12:00 PM PT	Client ***FINAL***

Contents

Release Notes

Section 1: Expense

Approver: Allow Approver to Change Expense Types

Overview

The client may now allow its approvers to change the value in the **Expense Type** field based on the field access rights. Prior to this change, the system prevented the approver from changing the expense type.

The following expense types ***cannot*** be modified:

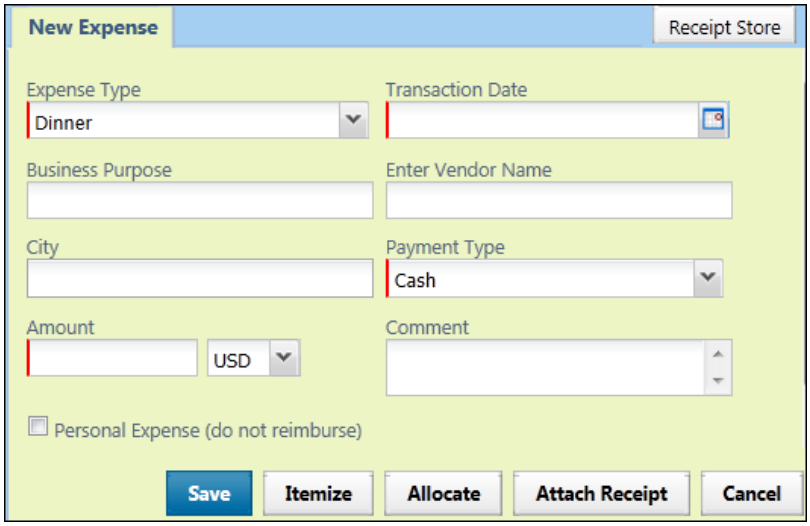
- Parent entries
- Car Mileage entries
- Travel Allowance entries
- Travel Request entries (linked to a travel request)
- Cash Advance entries
- Regular Hotel entries (not a parent or a child entry)

BUSINESS PURPOSE / CLIENT BENEFIT

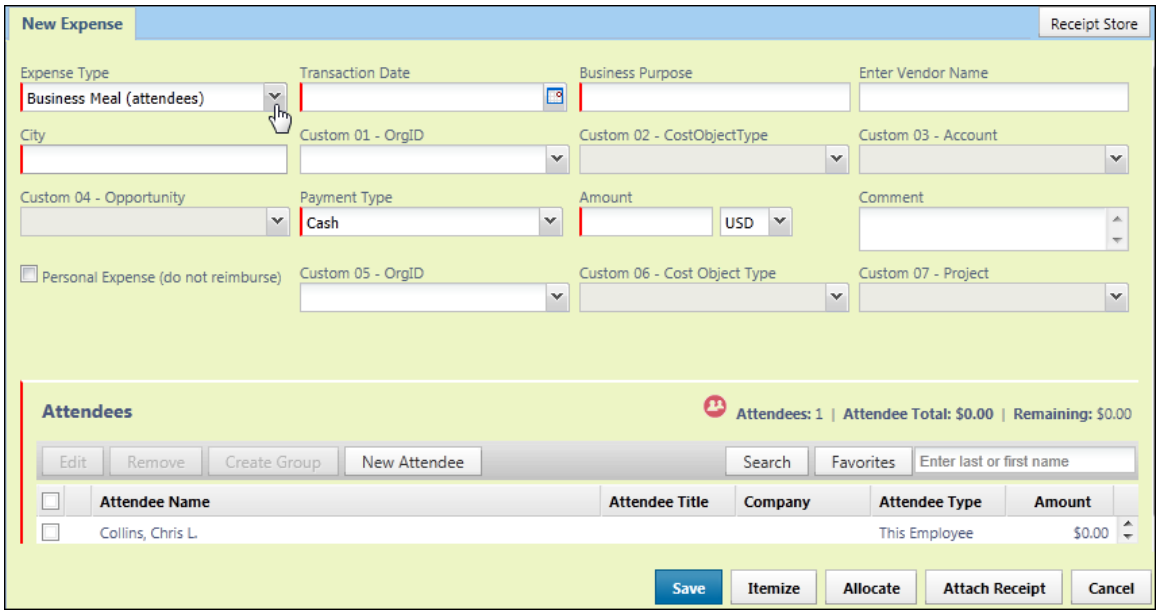
This enhancement provides additional flexibility when approving reports.

Example: Expense Type Change - Dinner to Business Meal (Attendees)

Assume an expense type of *Dinner* (shown below) should have been set by the user as *Business Meal (Attendees)*:



When the approver changes the expense type, as expected, the new form displays (if applicable). It shows shared fields, adds new form-specific fields, and removes all non-associated fields. In this example, the Attendee grid displays, along with any custom fields added to the Entertainment form by the company:



Now, the approver is permitted to make changes based on the field access rights. In this example, the approver now needs the attendee information. The approver might fill out what he/she can and then send the report back to the original creator for completion.

NOTE: If the Split Expense Report feature is used, the approver may approve selected entries and return others to the employee for completion.

Reversing Changes – Retrieving the Data for Removed Fields

If an expense type change must be reversed, the original values will appear for all shared fields (fields on the form associated with the initial expense type ***and*** on the form associated with the new expense type). However, data cannot be retrieved for the fields that were removed (not used with the new expense type). These values are captured in the audit trail, which the approver should reference to replicate the original report.

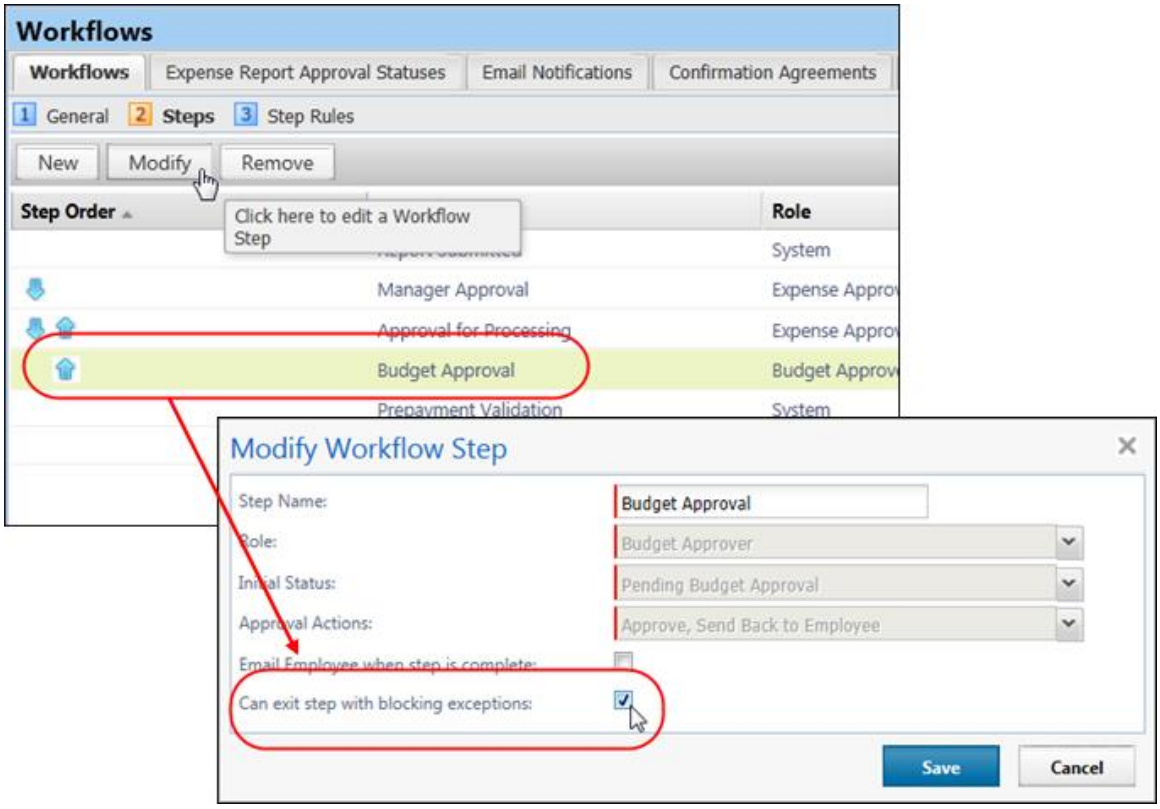
Best Practice: Blocking Reports With Exceptions

Until a company is satisfied with the unintended error rate caused by approver changes, they should disable the **Can exit step with blocking exceptions** check box. Doing this prevents a report from moving through the workflow step until blocking exceptions are cleared. This alerts the approver to his/her error and prevents submission of reports that may adversely impact the client's financial system.

Configuration / Feature Activation

Clients wanting to use this feature must contact Concur Client Support for assistance.

Concur will make the change shown here.



Concur will also make the field access changes requested by the client.

Expense Report Audit Trail: Updated with Comments for Processors When User Emails Detailed Report

Overview

When a user, approver, or processor chooses to email a detailed report, Concur places an entry – which by default is visible only to Expense processors – in the audit trail for the report indicating the date/time and the email address to which the email was sent. In the May 2014 release, Concur enhanced the audit trail entry for Expense processors with the following additional information:

- The name of the person sending the email
- The content of the comments added to the body of the email, to a maximum of 1300 characters. Any additional characters will be truncated.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides greater visibility when users choose to email report details.

Configuration / Feature Activation

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

Workflow Email Notifications: Expired Approver Name Now Available for Approval Timeout Emails

Overview

Currently, when a report pending approval reaches the approval expiration limit, Concur sends out an email notification. With this release, the content of the email can include the name of the approver whose approval queue the report was in when it expired.

The approver information appears based on new variables that can be manually added to the email template.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides more information about approval issues to clients.

Configuration/Feature Activation

There are two parts to the configuration:

- Manually add the variables to the desired email notification (to be completed by the client)
- Configure the workflow to use the email that contains the variables (to be completed by Concur if a new notification is created)

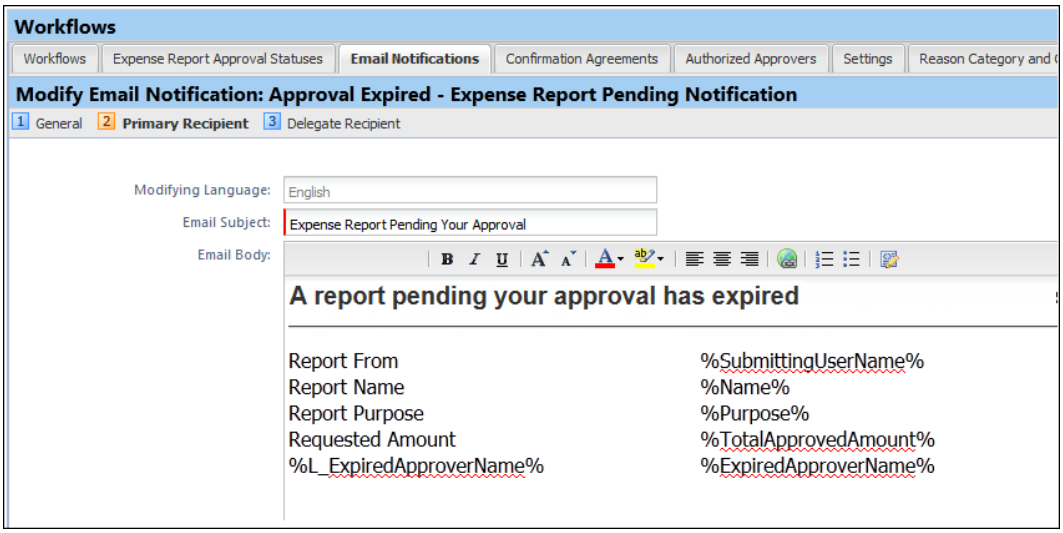
MANUALLY ADD THE VARIABLES TO THE DESIRED EMAIL NOTIFICATION

The client can add the new variables to an existing email notification or create a new email notification that includes the new variables. If you create a new email notification, then you will need to work with Concur to activate it for the workflow.

! **IMPORTANT:** If the client is currently using the Default Expense Report Pending Notification email, then the client ***must*** create a new notification. The default notification cannot be edited; the client must copy the default notification and then make the desired changes.

To add the variable to the email notification:

1. Click **Administration** > **Expense Admin** > **Workflows**.
2. Click the **Email Notifications** tab.
3. Then:
   - If using a default notification, you must create a copy (you cannot edit a default email notification):
     - Click the Default Expense Report Pending Notification.
     - Click **Copy**.
     - On the 1 **General** step, provide a new name.
     - Click **Next**.
   - If using ***other than*** a default notification:
     - Click the desired notification.
     - Click **Modify**.
     - On the 1 **General** step, make any desired changes.
     - Click **Next**.
4. On the 2 **Primary Recipient** step, enter the new variable in the email text:



The HTML used above is:

```
<tr>
<td><p class="data">%L_ExpiredApproverName%</p></td>
<td> </td>
<td><p class="data">%ExpiredApproverName%</p></td>
</tr>
```

5. Click **Next**.

6. (Optional) On the 3 **Delegate Recipient** step, add the expired approver variable to the delegate email text.

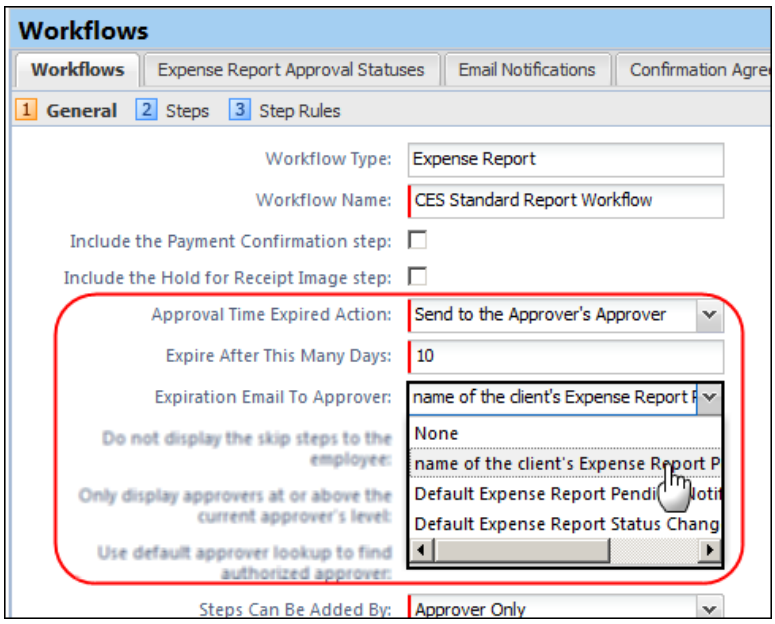
7. Click **Done**.

CONFIGURE THE WORKFLOW TO USE THE EMAIL THAT CONTAINS THE VARIABLES

This part is completed by Concur. Clients must contact Concur Client Support for assistance. Concur will follow the configuration/activation steps noted below. When creating the change request with Concur, please include the name of the email notification and the name of the workflow(s) to be modified.

To configure the workflow:

On the 1 **General** step of the **Workflow** tab, ensure that these three options are set:



- **Approval Time Expired Action:** Select the desired action.
- **Expire After This Many Days:** Enter the desired number of days.
- **Expiration Email to Approver:** Select the newly created/edited email notification that contains the new variables.

Travel Allowance: Change in Czech Calculation

Overview

With this release, the Czech logic for choosing the rate to use for a day with multiple foreign locations is modified as follows: The transit time between foreign locations will count towards the ***destination*** location. Currently, the system counts transit time between foreign locations to the ***origin*** location.

Handling of transit time between foreign locations is changed as follows:

- If the border crossing field is OFF, then the transit time counts toward the destination location.
- If the border crossing field is ON, then the transit time from border crossing to arrival counts towards the destination location.

Refer to *Travel Allowance Configuration Guide – Czech Republic* for more information.

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:

Client Support Portal

Release Notes - Concur Professional/Premium

Notes:

- *If you cannot access the current release notes, please clear your browser cache and try again.*
- These documents are provided in English only.
- When are the release notes posted?

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
Additional services: 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) **NOTE:** Mobile is ***not*** 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		

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration/ Feature Activation

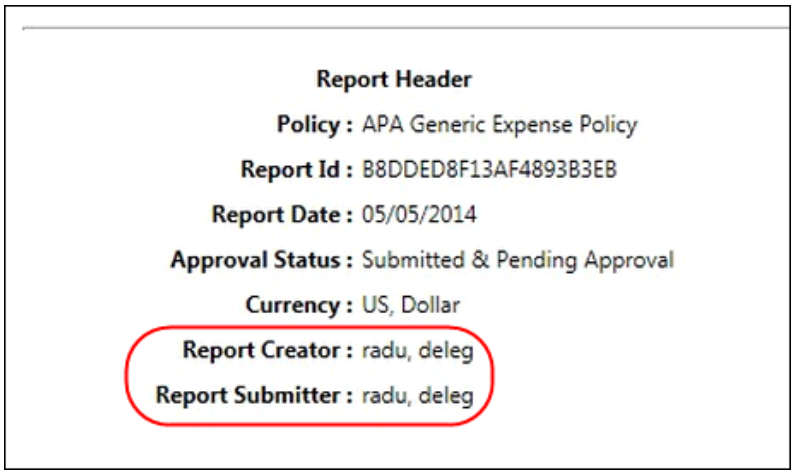
The feature is automatically on; there are no additional configuration steps.

Printed Reports and Delegates: Report Creator and Submitter Fields

Overview

Two new fields – Report Creator and Report Submitter – can be added to the printed report to display the name of the delegate associated with these actions. These fields appear ***only*** if the action was completed by a delegate:

- If the delegate created and submitted the report, both fields appear along with the delegate's name.
- If the delegate created the report but the report owner submitted it, the creator field appears along with the delegate's name; the submitter field does not appear.
- If the report owner created and submitted the report, neither field appears.



BUSINESS PURPOSE / CLIENT BENEFIT

This update adds additional information to the printed report.

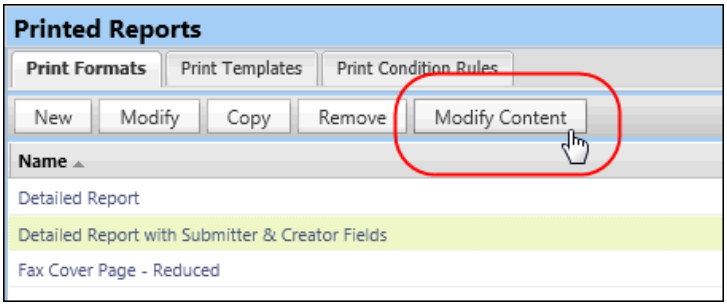
What the Admin Sees

The admin will now see the options to add these two new fields when working with the Printed Reports tool.

Configuration / Feature Activation

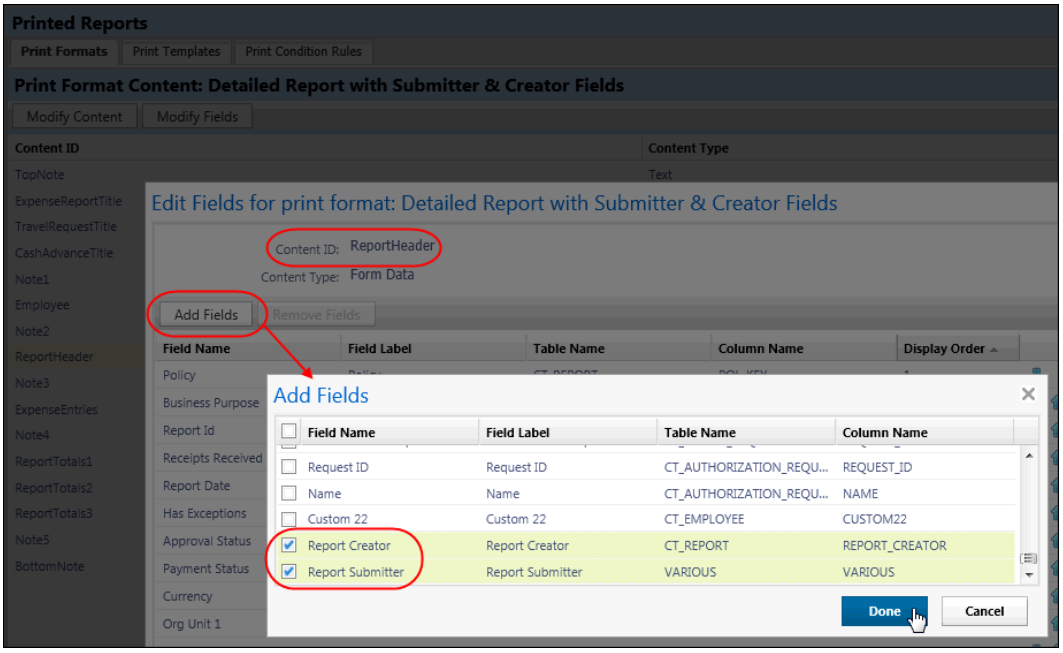
▸ ***To add the new fields to the printed report:***

1. Click **Administration** > **Expense Admin** > **Printed Reports**.
2. On the **Print Formats** tab, select the report and click **Modify Content**.



3. Select *ReportHeader* and click **Modify Fields**.

4. Click **Add Fields** and select the field(s) you want to add.



5. Click **Exit** or **Done** as required to return to the **Printed Formats** tab.

📖 Refer to *Expense: Printed Reports Setup Guide* for more information.

Japan Public Transportation: Extended Update of Commuter Pass Routes

Overview

With this release, all commuter pass routes in Expense that share selected station and date attributes are validated in bulk whenever any single one of them is validated. This means that, when updating a commuter pass, all those that share the same starting and ending stations, and the same starting pass date, are validated when you validate a selected commuter pass.

BUSINESS PURPOSE / CLIENT BENEFIT

This update speeds the commuter pass verification process via Jorudan by updating all passes of the same criteria at the same time.

What the Admin Sees

The admin will see no change, but will note that every matching commuter pass is updated when they update a single one that shares the same criteria.

Configuration / Feature Activation

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

Central Reconciliation: AirPlus Transactions Grouped Together

The Central Reconciliation (CR) Processor will now see AirPlus transactions grouped using new logic. Currently, the invoice number is identified using the MasterCard transaction ID, a 13-digit ticket number and 2-digit booking type classifier. With this release, air and rail transactions will be searched within the **TicketNum** field before the transaction ID.

Company Bill Statements: Future Statement Periods Now Supported

Overview

With this release, the Company Bill Statement administrator can now choose to create and manage card statement periods that extend into the future. This is useful whenever the admin needs to view and adjust a card's statement period start and end dates into the future, up to one year.

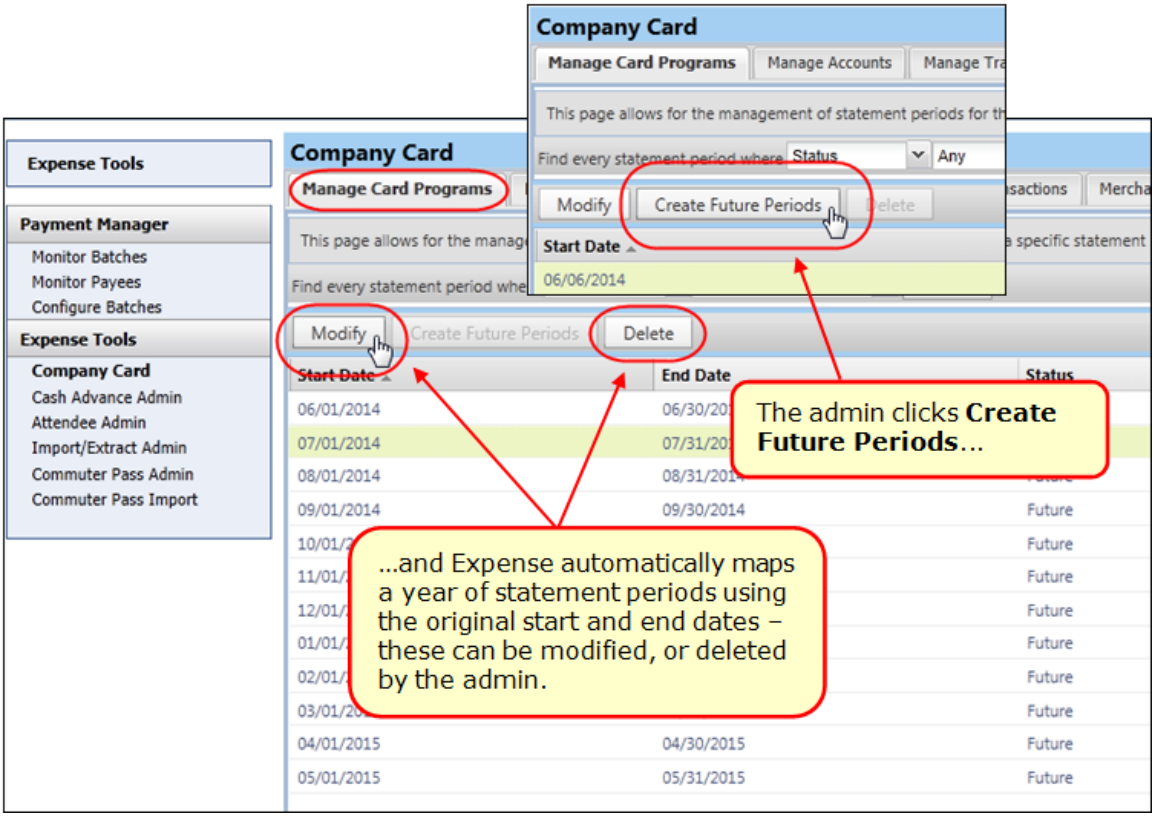
This feature provides a mechanism to create the year-long statement period, filter the view to this card status type when managing these accounts, and modify and delete one or more months within the future statement period. This allows the admin to fine-tune the number of months by deleting, and match the monthly start and end dates to specific dates that match those of their card program issuer.

BUSINESS PURPOSE / CLIENT BENEFIT

This update frees the administrator to plan their statement periods into the future.

What the Admin Sees

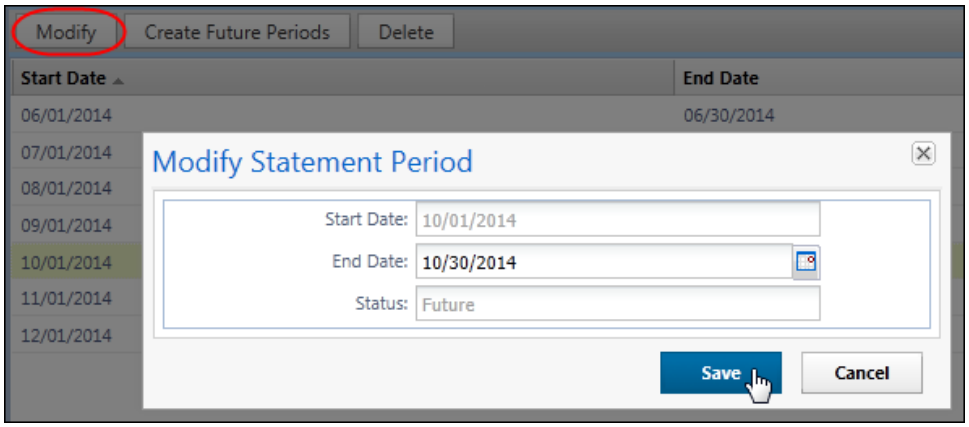
The admin managing company-billed card programs will now see the **Create Future Periods** button when viewing the statement periods for a selected card.



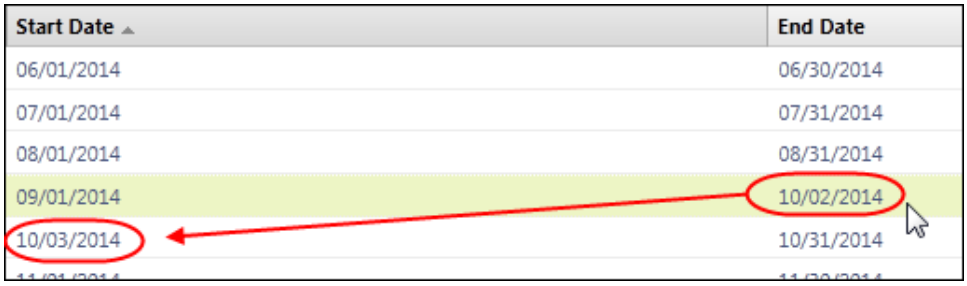
Using this option also displays the **Modify** and **Delete** buttons. These are used to open the selected month for modification, or to delete one or more months.

MODIFYING THE FUTURE STATEMENT PERIOD

Modification is limited to a single row at a time, and the *End Date* value only. This allows the admin to match the end dates provided by the card program issuer.

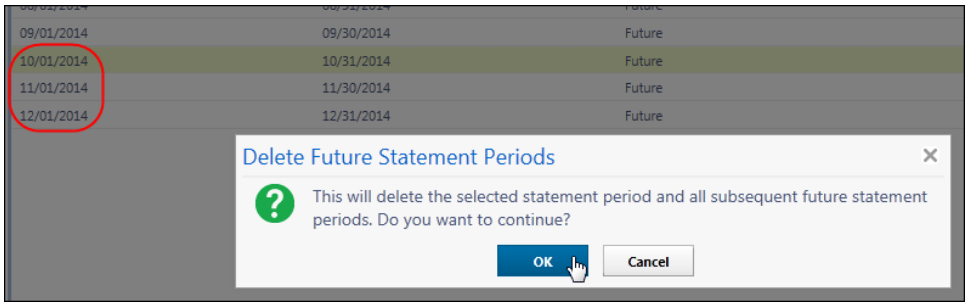


When updated in the **Modify Statement Period** dialog box, the new end date resets the following month to prevent any overlap and ensure each period is consecutive. For example, an end date changed from 9/30/2014 to 10/2/2014 causes the following month (October) to shift the existing 10/1/2014 date to 10/3/2014.



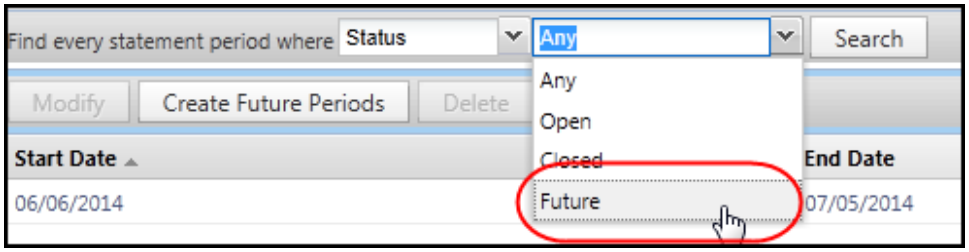
DELETING ONE OR MORE MONTHS FROM THE FUTURE STATEMENT PERIOD

When deleting months using the **Delete** button, the month you select and *all* succeeding months are removed, as logically you cannot remove only a single month from within a statement period.



SEARCH: FILTERING THE VIEW BY FUTURE STATUS

With this feature comes the ability to also filter the view to the future statement periods by selecting the *Future* filter type when searching.



Configuration / Feature Activation

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

📖 Refer to *Expense: Company Card & Company Bill Statement Administrator User Guide* for more information.

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.

Section 2: Credit Cards

AMEX GL 1076: Travel Addenda Data Now Included in Enhanced Data

Overview

With this release, travel-related data available in the Amex GL1076 will be imported and available within Concur Expense. This can include the ticket number, departure date, passenger name, service class, carrier, and origin and destination points as examples.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides additional information about the transaction when it is included in the data feed.

Configuration / Feature Activation

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

Coming Soon New Fleet/Fuel Card Program

Concur will soon provide – for clients who use the WEX Fleet Card (formerly the Wright Express Universal Fleet Card) – processing for fleet/fuel card transactions.

There are three types of card programs:

- **Driver card:** Card assigned to a specific driver, to be used for all fleet/fuel transactions incurred by that driver in any vehicle

  The card accounts are assigned directly to the driver, who can see and manage the charges just like any other Corporate or Purchasing Card.

- **Vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver

  For these accounts, the driver must enter his/her driver ID at the pump or point-of-sale. Concur will import the card charges and – using the driver ID – route them to the appropriate Concur user (driver).

- **Managed vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver but all transactions are managed by a single client-defined driver/employee

  The card accounts are assigned directly to the driver/employee, who can see and manage the charges just like any other Corporate or Purchasing Card.

Note the following:

- This is a no-fee service available only to clients who use WEX Fleet Card (formerly the Wright Express Universal Fleet Card). Additional fleet cards will be available in the future.
- The fleet/fuel transactions appear to the user in Expense just like other card charges.

More information will be available in a future release.

Supported Configurations

Monthly Browser Certifications

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

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

Microsoft Internet Explorer Version 7.x Retirement December 2014

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.

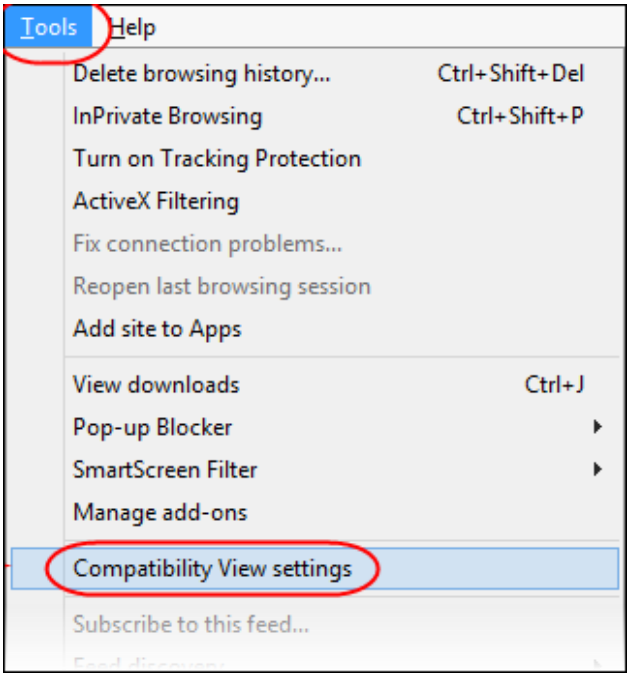
Internet Explorer V. 11: Best Practice for Use With Concur Products

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.

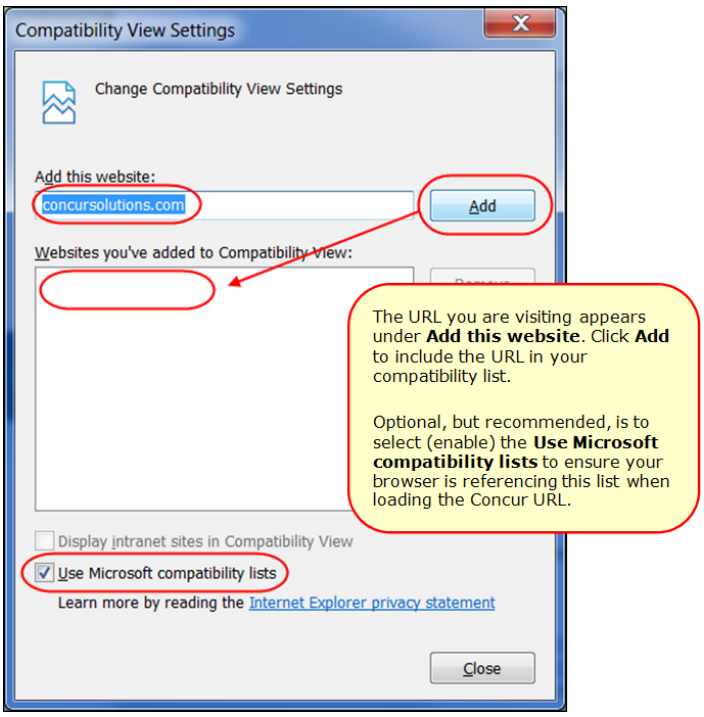
▶ ***To add Concur to your IE v. 11 compatibility list:***

1. In IE v.11, load the Concur page (for example, www.concursolutions.com).
2. Click **Tools** > **Compatibility View settings** to open the **Compatibility View Settings** dialog box.



Optional: If the **Tools** menu is not displayed, show this menu by pressing Alt.

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**.

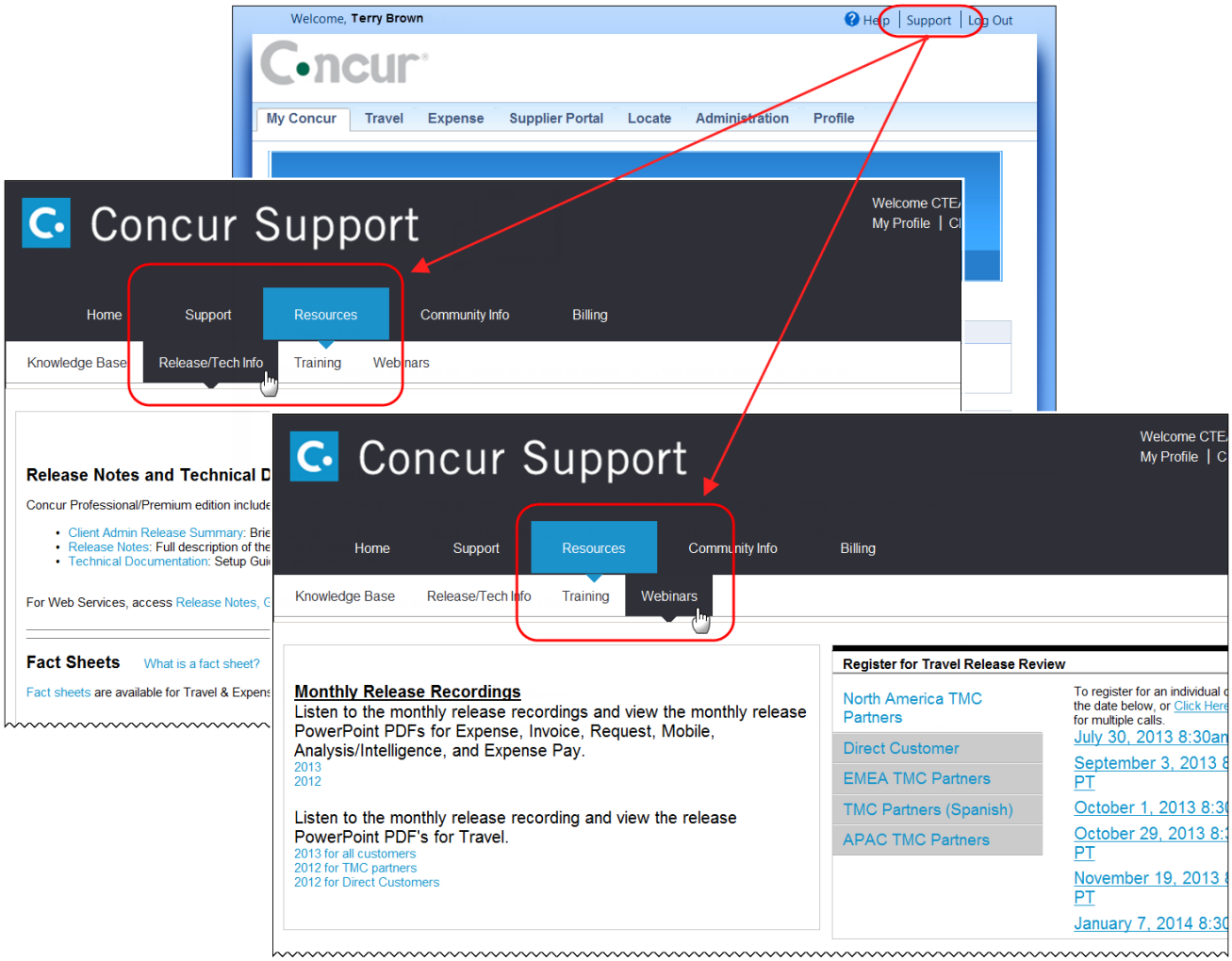
Additional Release Notes, Webinars, and Technical Documentation

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**.

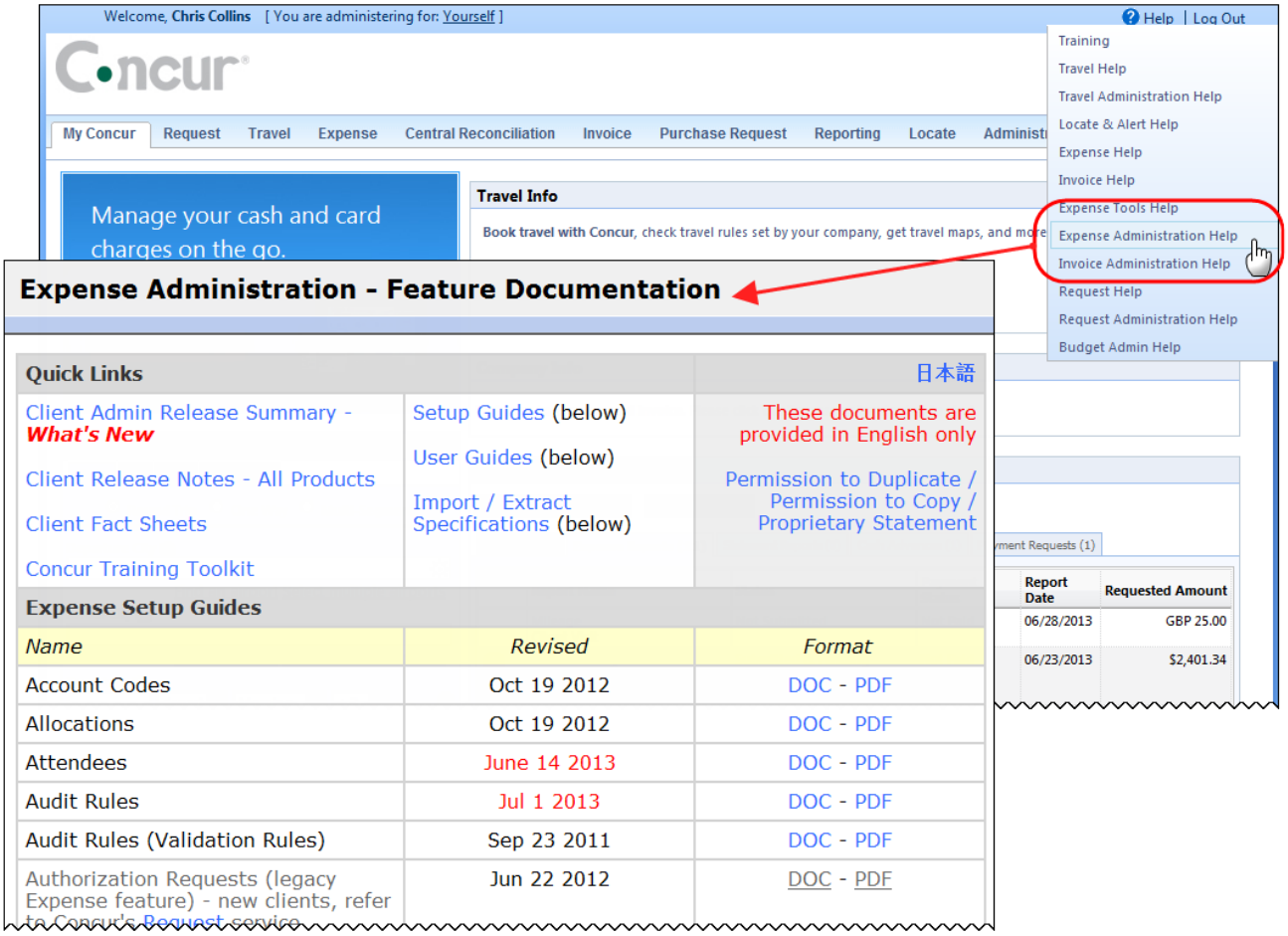
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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.



Concur Release Notes **Expense Professional / Premium** Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	**Audience**
June 2014 Update #2: Monday, June 23, 2:00 PM PT	Client ***FINAL***

Contents

Release Notes

Expense

Japan Public Transportation: Return Either IC Card or Paper Ticket Results Using Route Search

Overview

Users of Japan Public Transportation can now return results based on the use of an IC Card for their travel instead of a paper ticket. This feature supports the recent change to fares based on these ticket types, allowing the IC Card user to specify the IC Card ticket type.

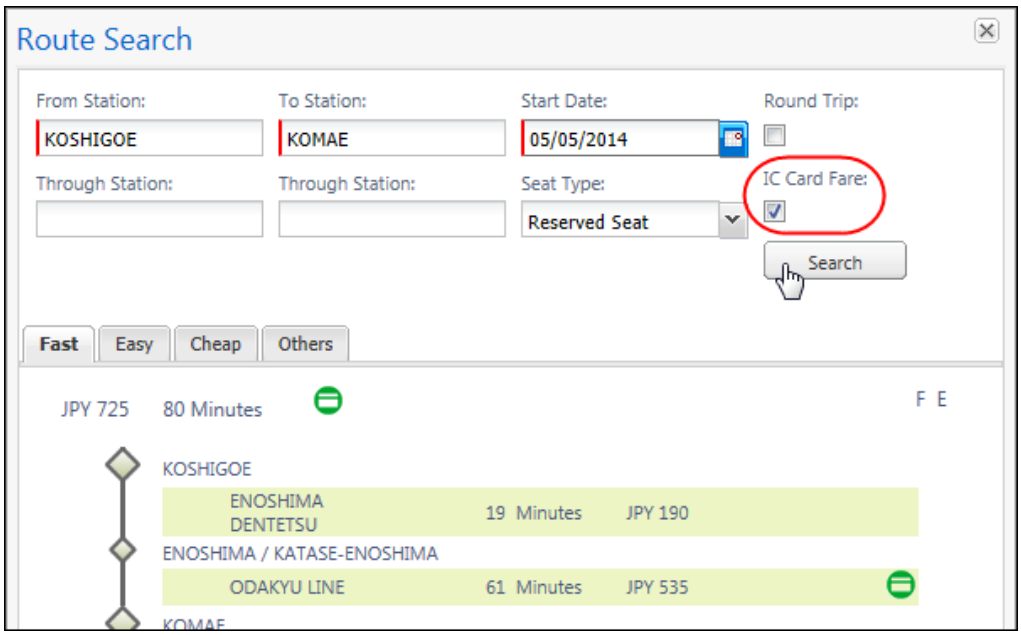
This is done using a new check box, **IC Card Fare**, to specify the ticket type when searching on the commuter route.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement lets a company now search for and apply the IC Card fare to the commuter route they traveled. This supports the April 1 change in Japan that bases a fare on the ticket type.

What the Japan Public Transportation User Sees

The user searching for commuter routes will now see the **IC Card Fare** check box, and can select (enable – the default setting) this check box to return routes supporting the use of an IC Card.



Configuration / Feature Activation

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

Japan Public Transportation: IC Card Icon Appears at Itinerary and Leg Level for IC Card Ticket Type

Overview

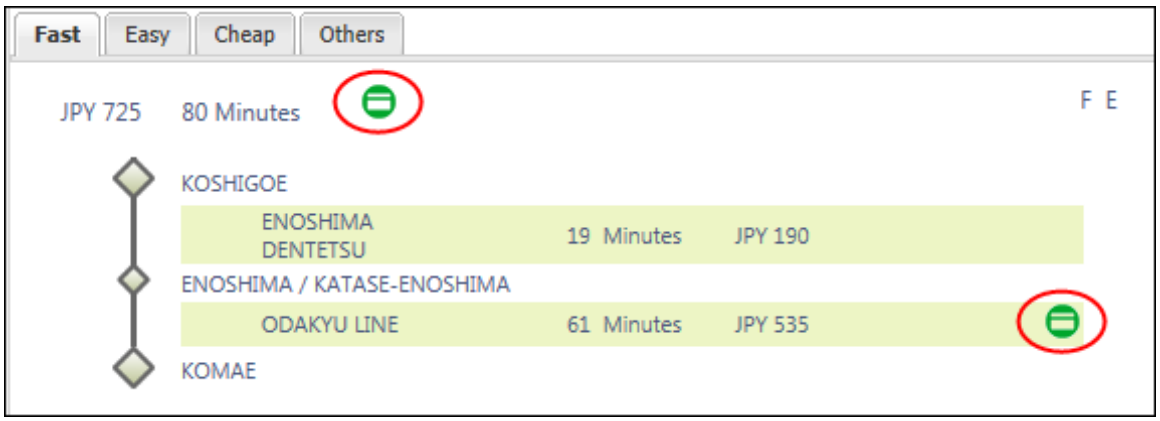
The IC Card icon is now displayed to a user in the search results when a leg of travel includes an IC Card fare; it is not displayed for the "paper fee" fare type. This allows the user to differentiate between those legs and itineraries incorporating an IC Card fare and those with only the paper fare.

BUSINESS PURPOSE / CLIENT BENEFIT

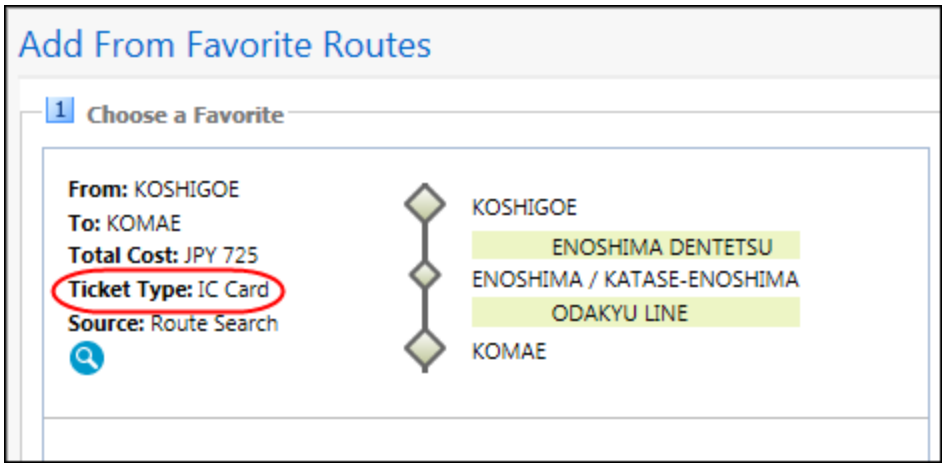
This update makes it easier to understand when each fare type is supported for the route returned after a search and to correctly show the amount used to travel.

What the User Sees

The user will now see the green IC Card icon first for the overall search return and associated with the specific leg of travel the card is applicable to. In this example, the first leg does not have a specific IC Card fare, while the second leg does use an IC Card fare type and is so marked by the icon.



The ticket type designating an IC Card route created from a route search itinerary appears with the user's Favorites feature.



This allows the traveler to quickly determine which Favorite Route itineraries have an IC Card fare and which do not. When a new route is created, any updates to the fare are displayed based on the fare type so that the user is informed of the route, and if there are changes to the fare since the route was last used.

Configuration / Feature Activation

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

📖 Refer to *Expense: Japan Public Transportation User Guide* for more information.

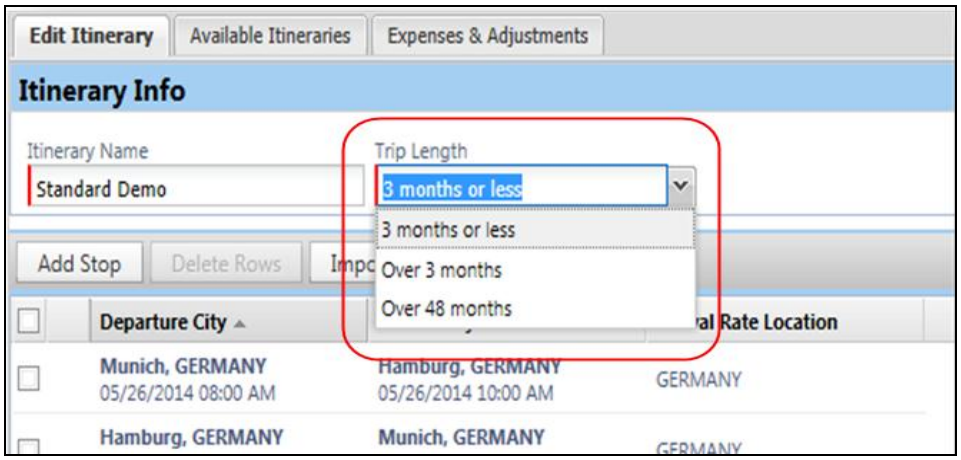
Travel Allowance: Enhancements to German Travel Allowance

This release brings additional optional settings for the German travel allowance module to enhance support for the 2014 rule changes, including:

- Length of trip
- Lodging type
- Nature of provided meal

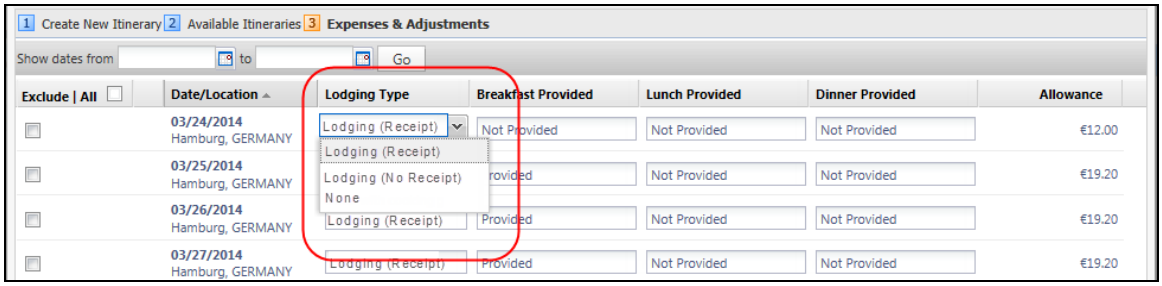
Length of Trip

The **Trip Length** field provides information about the proper tax treatment for the company and is selected on the itinerary creation page.



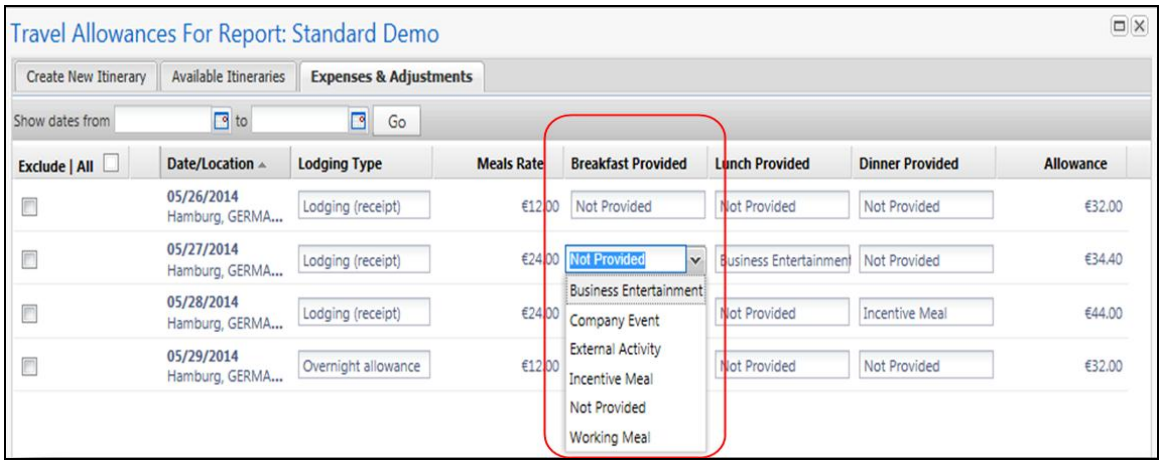
Lodging Type

Lodging type is a new selection for each date of the trip and drives both the tax-free meals allowance amount and the lodging allowance.



Provided Meals

New options for indicating the nature of the provided meals collect necessary information to determine if the allowance should be reduced and/or if there is any tax implication for the user.



Refer to the *Travel Allowance Configuration Guide – Germany* for more information.

Known Issue

The **Expenses & Adjustments** page will display an incorrect amount to the user under a specific scenario: If the user starts the trip on day #1 after 8 PM and completes the trip on day #2 prior to 4 AM with a lodging choice of *None* and a total trip duration of 8 hours or less (invoking the midnight rule), then the display of the allowance amount on the **Expenses & Adjustments** pages may not be correct until the user clicks **Create Expenses**.

The allowance is correctly calculated and appropriate expenses are created based on the rates and configuration of the system. If the user returns to the **Expenses & Adjustments** page, the correct allowance is displayed.

Generic Time Band - Travel Allowance: View Base Rate in Rate and Reimbursement Currency

With this release, travelers can now view their travel meals allowance amounts in the currency of the assigned rate so they will know that amount in the currency they will spend.

To do this, the **Meals Rate** column is now modified to display both the rate currency and the reimbursement currency if the optional **Display Base Meals Rate In Rate Currency** check box is selected (enabled).

LIMITED / PHASED ROLLOUT OF THIS FEATURE

This feature will apply only to the Generic Time Band rate configuration with this release. However, others will be added in future service releases.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides greater visibility to allowance expenses in the currency of the published rate.

What the Traveler Sees

The traveler will now see two figures when working in **Step 3: Expenses & Adjustments** in the **Travel Allowance for Report** page. This view, however, depends on the activation of the setting in the Travel Allowance configuration.

Example

Assume a traveler with a reimbursement currency of USD and a rate of EUR. Now, when this feature is activated, both the EUR rate currency and the USD reimbursement currency are displayed as "38.73 EUR / 53.25 USD" in the **Meals Rate** column.

Configuration / Feature Activation

To activate the feature, the administrator uses the Travel Allowance tool in Expense Admin.

To enable the display of both currency rates:

1. Click **Administration** > **Expense Admin** > **Travel Allowance**.
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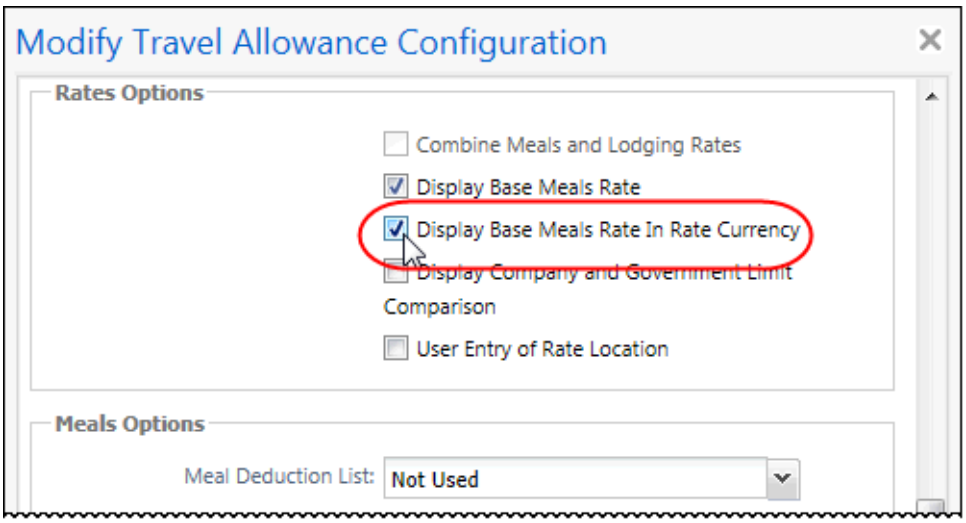

4. Select (enable) the **Display Base Meals Rate In Rate Currency** check box.
5. Click **Save**.

The feature is enabled and both rates will now display in the column.

Refer to *Travel Allowance Configuration Guide – Generic Time Band* for more information.

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
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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.

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Note the following:

- This is a no-fee service available only to clients who use WEX Fleet Card (formerly the Wright Express Universal Fleet Card). Additional fleet cards will be available in the future.

- The fleet/fuel transactions appear to the user in Expense just like other card charges.

More information will be available in a future release.

ExpenseIt

New Feature for ExpenseIt Users with American Express

Overview

Clients who use Concur Expense, ExpenseIt, ***and*** American Express (Amex) should be aware that Amex will soon be releasing the real-time notification feature. With this feature, when a user's Amex card is used, Amex will send a notification to the user's iPhone or Android mobile device asking if the user wants to capture the receipt image for ExpenseIt.

Then, the user can snap a picture of the receipt and have ExpenseIt automatically create an expense entry using the receipt details.

BUSINESS PURPOSE / CLIENT BENEFIT

This is a great reminder for users to snap the picture immediately instead of waiting until numbers of receipts accumulate. Also, even if the user does not want to capture the receipt, this notification serves as an additional security measure – it notifies the user whenever his/her Amex card is used.

Configuration/ Feature Activation

Activation of the real-time notification feature is fully controlled by Amex. Amex will phase-in the feature to groups of its clients, starting the first of June.

NOTE: This feature is currently available only to Amex clients based in the United States and Australia.

If a Concur client has the real-time notification feature turned ON for its users but an individual user does not want to use it, that user can disable push notifications on his/her device (in the ExpenseIt app under Settings).

If you have any questions, please contact Concur Client Support.

Imports/Extracts

Employee Import: "Non" Employee Attribute Added

Many clients need to specify a user at their company as a person who is not officially an employee (such as a contractor). This is useful when clients do not want selected users or user types to be entered in the system and be factored in features such as Attendees.

Support for this user attribute was added for the User admin in the March 2014 release. The current release adds the ability to set this attribute in the employee import.

To do this, the Import/Extract administrator (formerly Integration Administrator) can now specify this attribute to any user they import. By doing this, the user is prevented from inclusion in selected features within Expense.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides flexibility when working with different user types.

Configuration / Feature Activation

The feature requires that the client modify their employee import to use this new attribute field.

📖 Refer to *Chapter 5: Employee Import* of the *Expense – Import and Extract Specifications* manual for more information.

Supported Configurations

Microsoft Internet Explorer Version 7.x Retirement December 2014

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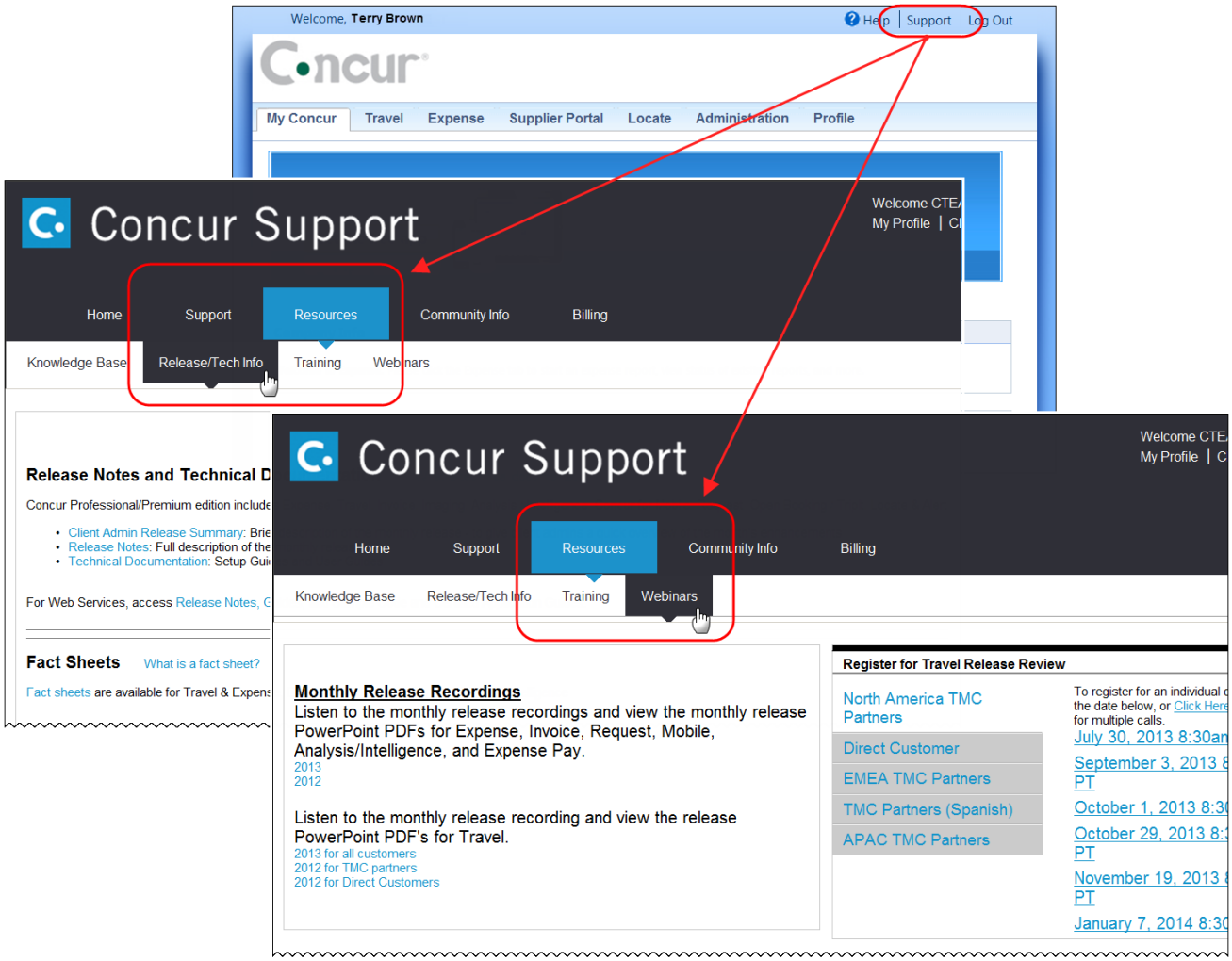

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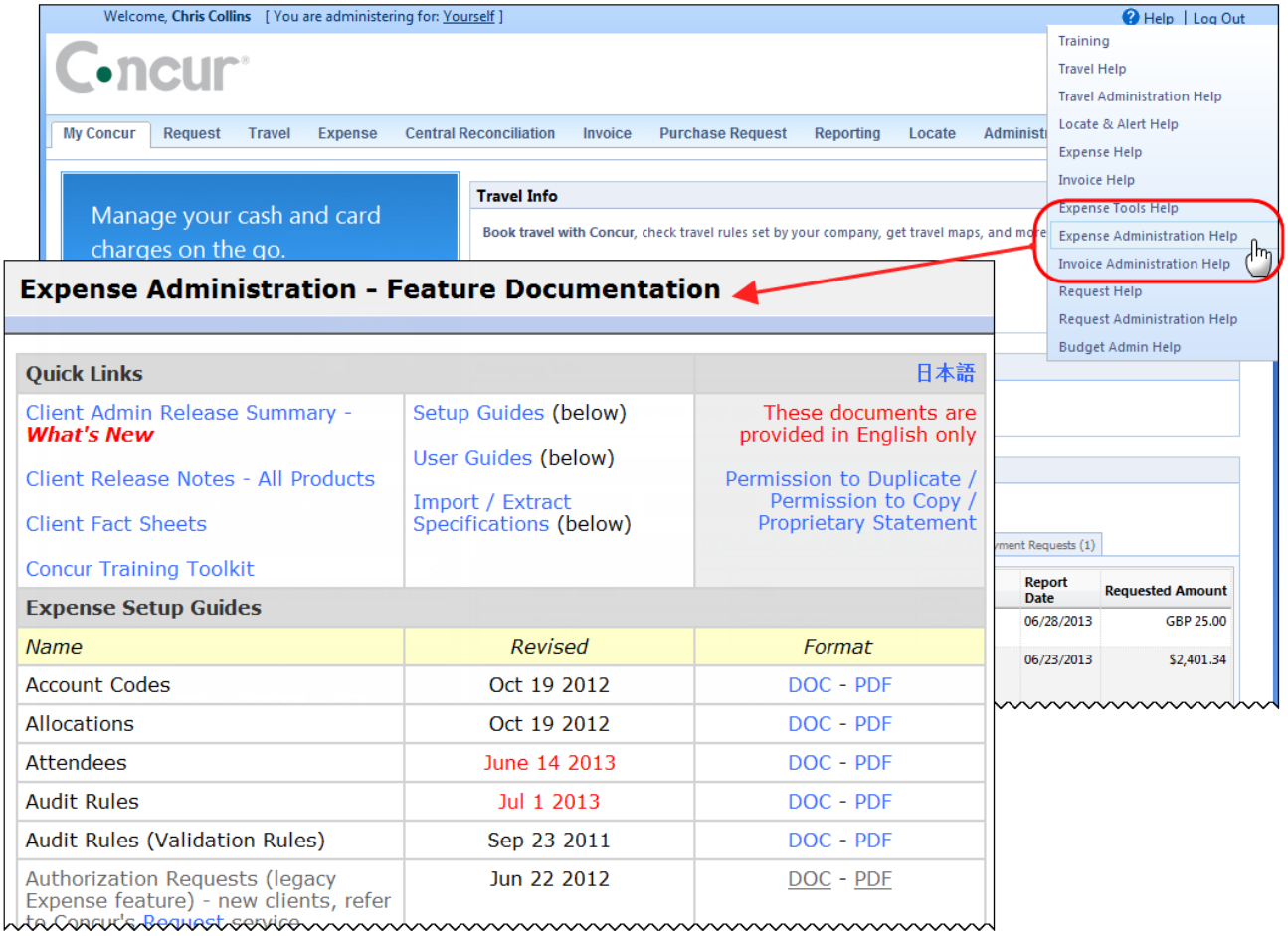
Online Help – Admins

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



Concur Release Notes **Expense Professional / Premium** Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	**Audience**
July 2014 Update #1: Thursday, July 17, 10:45 AM PT	Client ***FINAL***

Contents

Release Notes

Expense

Travel Allowance: View Base Rate in Rate Currency and Reimbursement Currency (Poland, Czech Republic, Generic Time of Day, Generic Standard)

Limited / Phased Rollout of This Feature

Last month, Generic Time Band rate configurations could use this new option.

With this release, it is available to:

- Poland
- Czech Republic
- Generic Time of Day
- Generic Standard

Overview

With this release, travelers can view their travel meals allowance amounts in the currency of the assigned rate so they will know that amount in the currency they will spend.

To do this, the **Meals Rate** column is now modified to display both the rate currency and the reimbursement currency if the optional **Display Base Meals Rate In Rate Currency** check box is selected (enabled).

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides greater visibility to allowance expenses in the currency of the published rate.

What the Traveler Sees

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Example

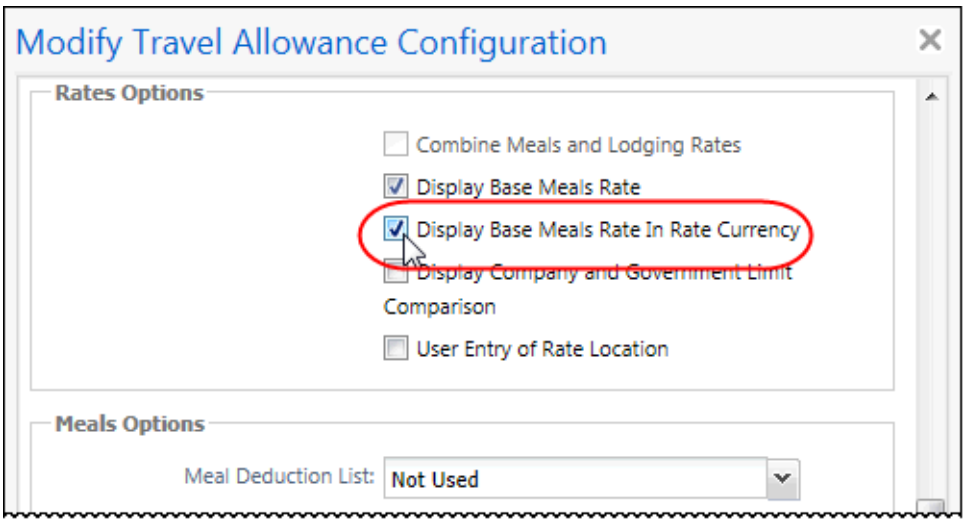
Assume a traveler with a reimbursement currency of USD and a rate of EUR. Now, when this feature is activated, both the EUR rate currency and the USD reimbursement currency are displayed as "38.73 EUR / 53.25 USD" in the **Meals Rate** column.

Configuration / Feature Activation

To activate the feature, the administrator uses the Travel Allowance tool in Expense Admin.

To enable the display of both currency rates:

1. Click **Administration** > **Expense Admin** > **Travel Allowance** (left menu).
2. On the **Configurations** tab, select a country configuration and click **Modify**.
3. In the **Modify Travel Allowance Configuration** dialog box, scroll to **Rates Options**.



4. Select (enable) the **Display Base Meals Rate In Rate Currency** check box.
5. Click **Save**.

The feature is enabled and both rates will now display in the column.

For more information, refer to:

- *Travel Allowance Configuration Guide – Poland*
- *Travel Allowance Configuration Guide – Czech Republic*
- *Travel Allowance Configuration Guide – Generic Time of Day*
- *Travel Allowance Configuration Guide – Generic Standard*

Japan Public Transportation: New IC Card Icon for Greater Clarity of Commute Route Origin

Overview

Users of Japan Public Transportation will now see a new icon ( ) for commuter pass routes associated with IC cards. This addition provides greater clarity on all devices when determining if the route was created manually, by a route search, or through the import of the IC card.

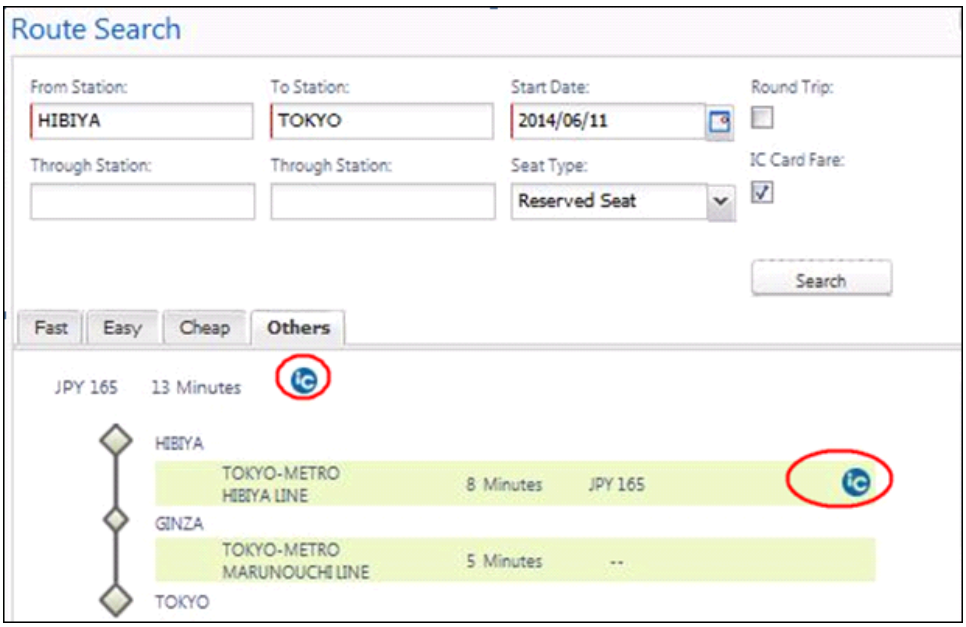
BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement lets a user of Japan Public Transportation clearly see which method was used to add the route to the report.

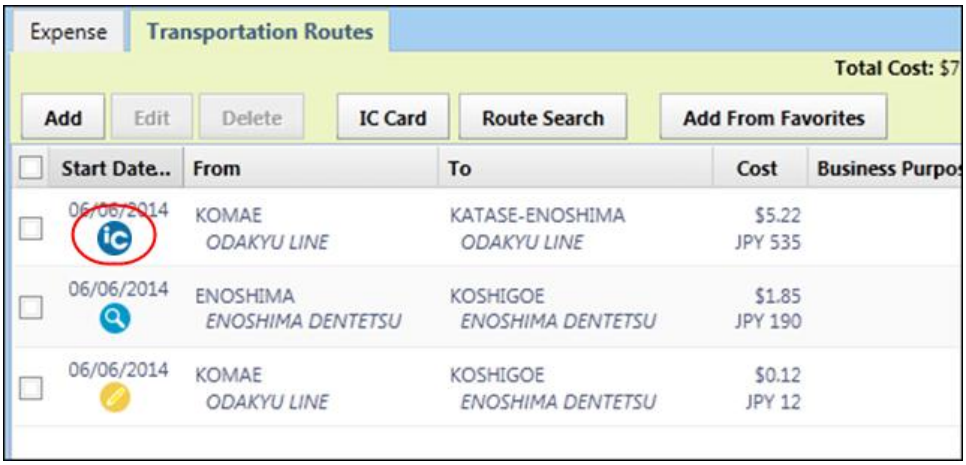
What the User Sees

The icon appears for all routes created either:

- By searching for a route returned with an IC card fare:



- When the route is added from an IC card imported transaction, using a card reader:



The icon appears for all routes created either by searching for a route returned as valid for an IC card or when the route is added from an IC card "read" into Concur using a card reader.

Configuration / Feature Activation

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

Japan Public Transportation: Selected Stations Now Renamed for Consistency with Jorudan Japan Rail

Overview

In order to better integrate with Jorudan Japan Rail systems and provide greater consistency, selected station names have been renamed.

BUSINESS PURPOSE / CLIENT BENEFIT

This update will return more accurate routes when a search of a commuter route is performed.

What the User Sees

The station names are renamed as follows:

- KOBE-SANNOMIYA(HANKYU) 神戸三宮（阪急）
  - renamed to -
  KOBE-SANNOMIYA[HANKYU] 神戸三宮［阪急］
- HANSHIN-SANNOMIYA 阪神三宮
  - renamed to -
  KOBE-SANNOMIYA[HANSHIN] 神戸三宮［阪神］

- TAKAOKAEKIMAE 高岡駅前
  - renamed to -
  TAKAOKAEKI 高岡駅
- HON-MARUKAIKAN-MAE 本丸会館前
  - renamed to -
  KYUKANIRYOU CENTER MAE 急患医療センター前

Configuration / Feature Activation

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

📖 Refer to *Expense: Japan Public Transportation User Guide* for more information.

User Interface

User Admin: Change Alphabetic List to Tabs

Overview

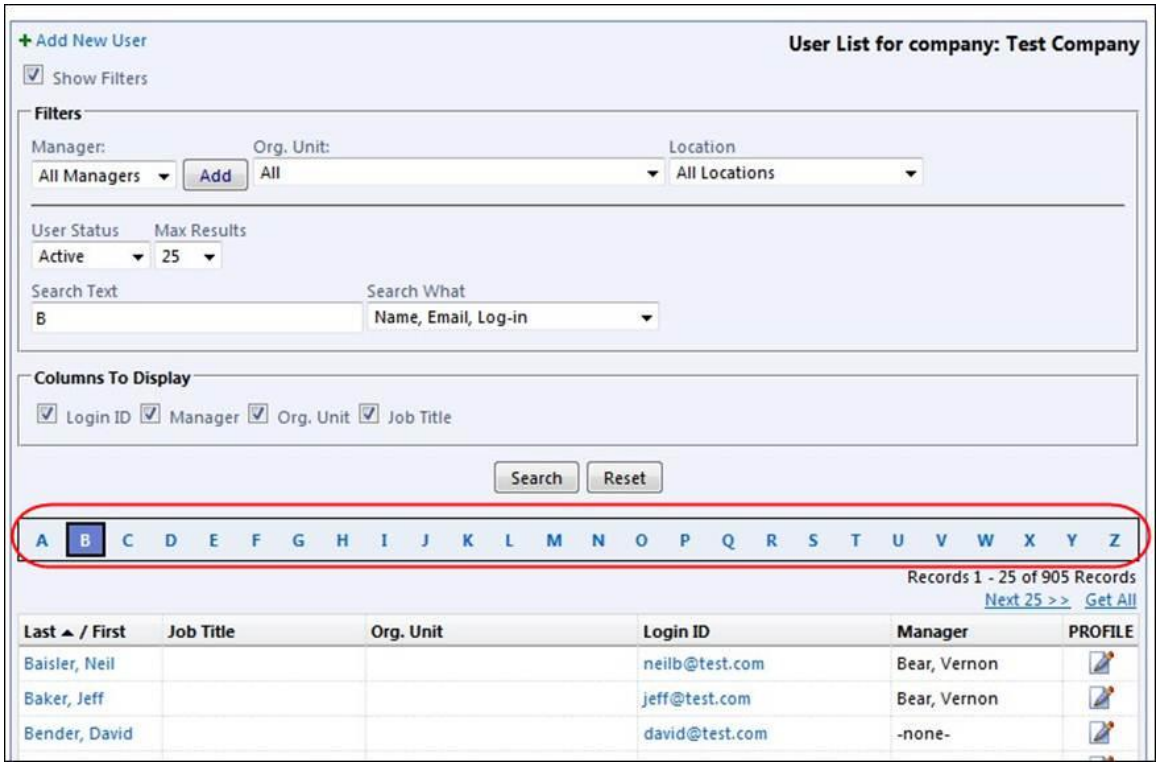
With this release, the alphabetic list on the User Admin page has changed from clickable letters to tabs representing each letter of the alphabet.

USER/CUSTOMER BENEFIT

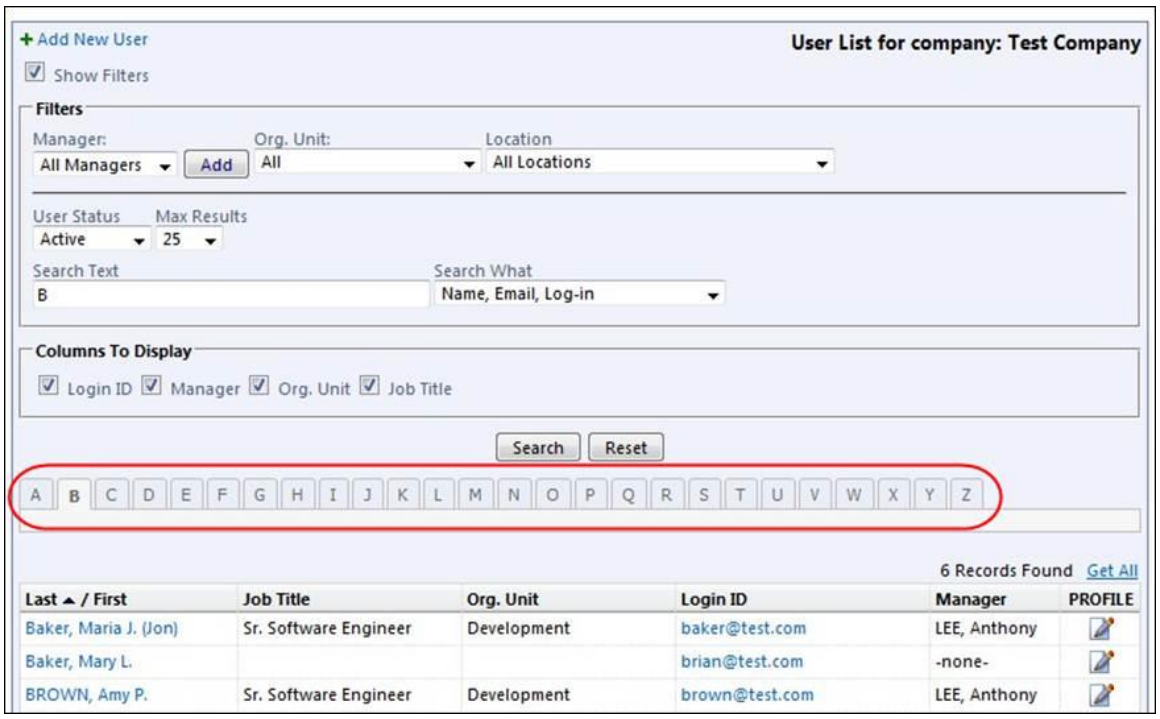
When this type of content is displayed as tabs, assistive technology users can quickly navigate to the content, easily skip over it, and easily orient themselves within it. When it is not, the user has to find it by moving through the entire page and cannot skip over it.

What the Admin Sees

Previous display:



Current display:



Configuration / Feature Activation

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

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 steps.

Coming Soon The Concur User Experience Evolution – Professional Edition

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?

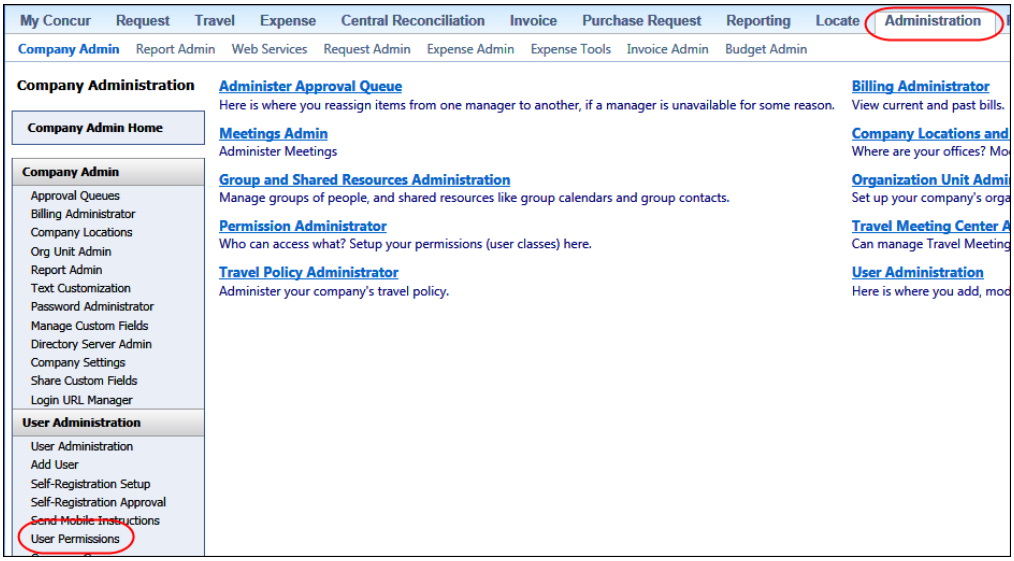
If an admin's roles/permissions provide access to the **Administration** menu, then the admin will be able to toggle the enhanced UI for himself/herself.

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.

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.

Expense Pay

Japan In-Country Payments Now Available

Overview

Concur has released the in-county payment service for Expense Pay for Japan. This service allows multi-national companies to pay employee reimbursements in Japan in the local currency (JPY). Expense Pay Japan is a fully managed, in-country payment service:

- Funding currency is Japanese Yen (JPY).
- All payments are made in Japanese Yen (JPY).
- The client's funding bank account and payees' bank accounts must be in Japan.
- American Express is the only Corporate Card supported at this time.

The Expense Pay Japan service consists of the process of the client sending funds to a Concur pre-fund account for Expense Pay to use to (1) reimburse the client's expense claim filers and/or (2) schedule payment to the client's supported corporate card issuer for corporate card charges and fees by credit transfer from the Concur account.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement expands the Expense Pay product to a new country.

Configuration / Feature Activation

This feature is available to clients who have purchased Expense Pay – Japan. Contact Concur Client Services to purchase this feature.

The client Reimbursement Manager will request a pre-fund bank account in Payment Manager. An Expense Pay Japan bank account will be set up by Concur for each client to use for the Expense Pay Japan service. The account creation may take up to five business days. When created, the funding screen will show the full details.

📖 For more information, refer to the *Expense: Expense Pay User Guide* and the *Expense: Payment Manager User Guide*.

SEPA Pay File Now Available in Eurozone – Limited Availability

Overview

Starting on August 1, all countries in the Single Euro Payments Area (SEPA) are changing to a unique bank payment transfer format, and all previous formats will be abandoned.

Concur has added a new method for employee reimbursements in the Eurozone, the SEPA Pay file bank extract. This method generates a pay file in XML format that is delivered to the client via FTP. The client is then responsible for sending the pay file to their bank to resolve the reimbursements.

This option is available for: Austria, Belgium, Denmark, France, Finland, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, Switzerland, and the United Kingdom.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides a simplified method for employee reimbursements that is desired in the Eurozone market.

Configuration/Feature Activation

This feature is limited availability and can be activated by clients with users in the Eurozone. For this release, this feature is only available for clients ***not*** using Expense Pay.

Credit Cards

Support for Auto-Assignment of BNP Paribas Card Account to Employee

Overview

With this release, the BNP Paribas ROP credit card feed will now attempt to auto-assign the card account to a card holder based on the identification number in the card feed row. This means that if the system detects a value for the *Card Holder Identification Number* data in a record (position 210-224) of the feed, it will attempt to match and assign the card account based on a similar identification value in Expense (CT_EMPLOYEE.EMP_ID).

NOTE: This feature is available starting the week of June 30, 2014.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement adds additional card assignment functionality to the Expense Credit Card feature.

Configuration / Feature Activation

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

Rail Addendum Transactions Included in AirPlus Lodge CDF 3.0 Import

Overview

With this release, the AirPlus Lodge CDF 3.0 Lodge import will now include Rail addendum transactions if present. By modifying the record details spreadsheet to include the definition for the *Passenger Rail Detail Addendum ("_5022")* record, this data is now available for addition to the expense report by the employee.

BUSINESS PURPOSE / CLIENT BENEFIT

This update includes additional addendum data for greater expense report accuracy.

Configuration / Feature Activation

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

Supported Configurations

Microsoft Internet Explorer Version 7.x Retirement December 2014

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.

Monthly Browser Certifications

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

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

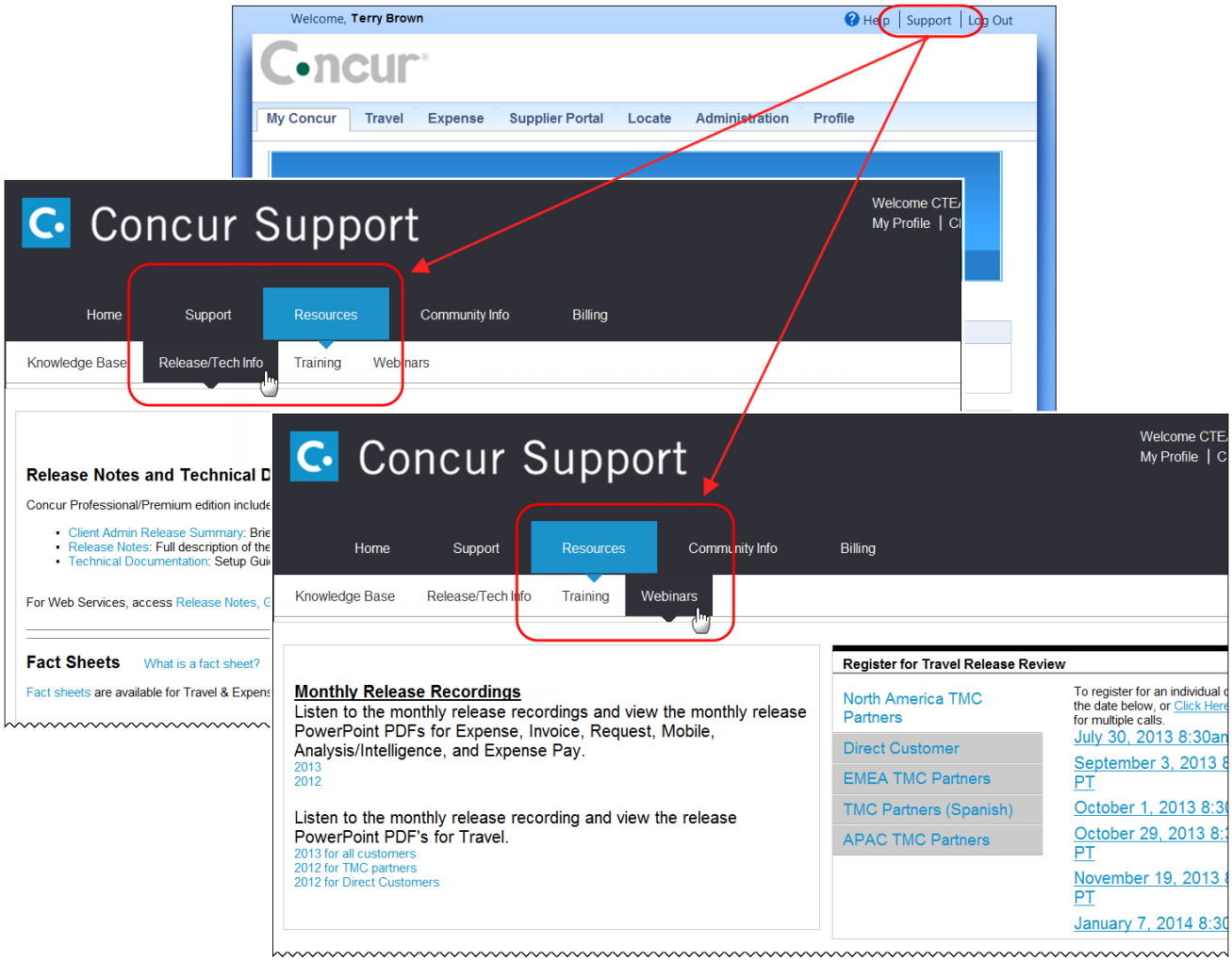
Additional Release Notes, Webinars, and Technical Documentation

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**.

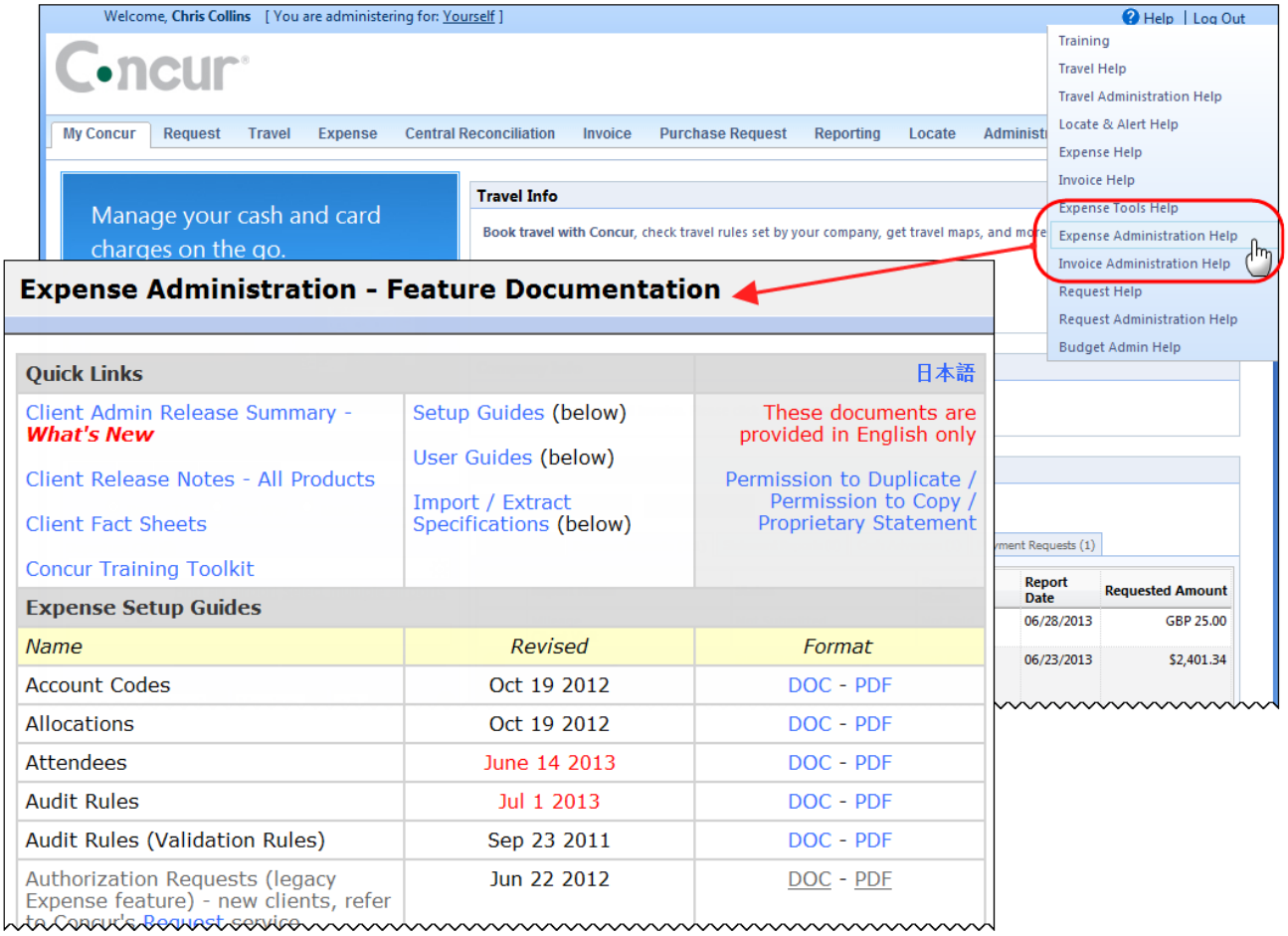
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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.



Concur Release Notes **Expense Professional / Premium** Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	**Audience**
August 2014 Initial Post: Friday, August 22, 11:00 AM PT	Client ***FINAL***

Contents

Release Notes

Expense

Conditional Fields Available on Forms

Overview

With this release, conditional fields are available for report header fields and expense entry fields.

Example of conditional fields: Assume that a check box (custom field with the label of **Are these expenses client related?**) appears on the expense report header. If the user checks the box (indicating "Yes"), then a second field – a list – appears. The user selects the appropriate client's name from the list. If the user does not select the **Are these expenses client related?** check box, the second field does not appear.

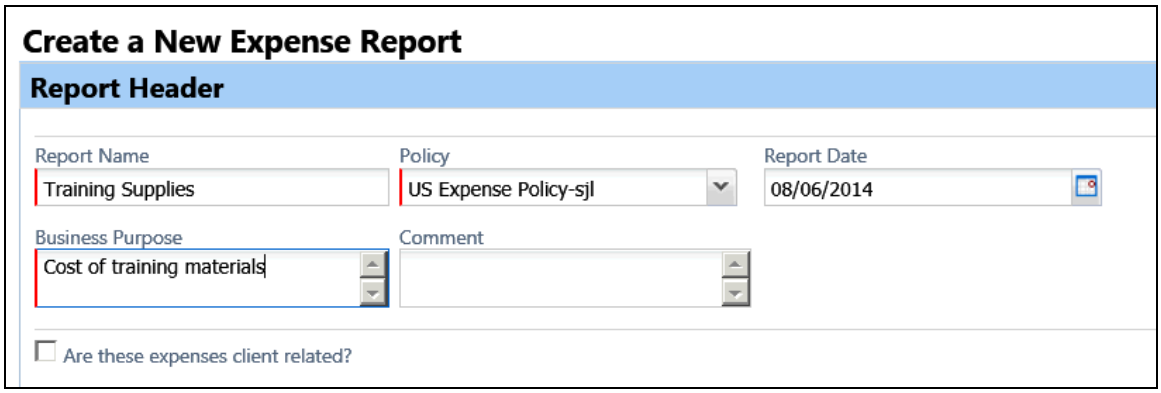
BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows clients to design cleaner, dynamic, easy-to-follow forms. This feature can be used to reduce unused fields (and clutter) on expense entries and expense reports.

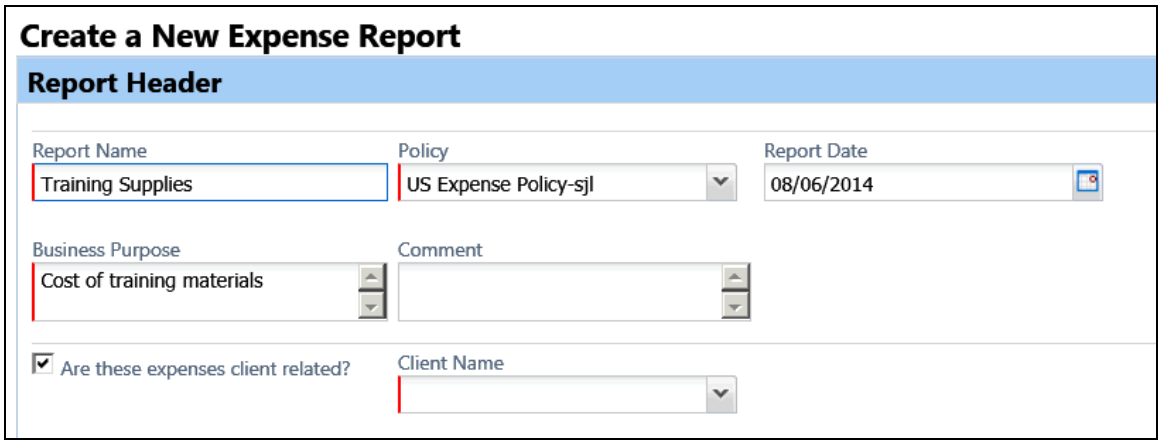
Though a similar outcome can be accomplished with audit rules, those rules are generally triggered when the user saves the report or entry. The user then returns to the report or entry and completes the appropriate field(s). With conditional fields, the user completes the appropriate fields immediately.

What the User Sees

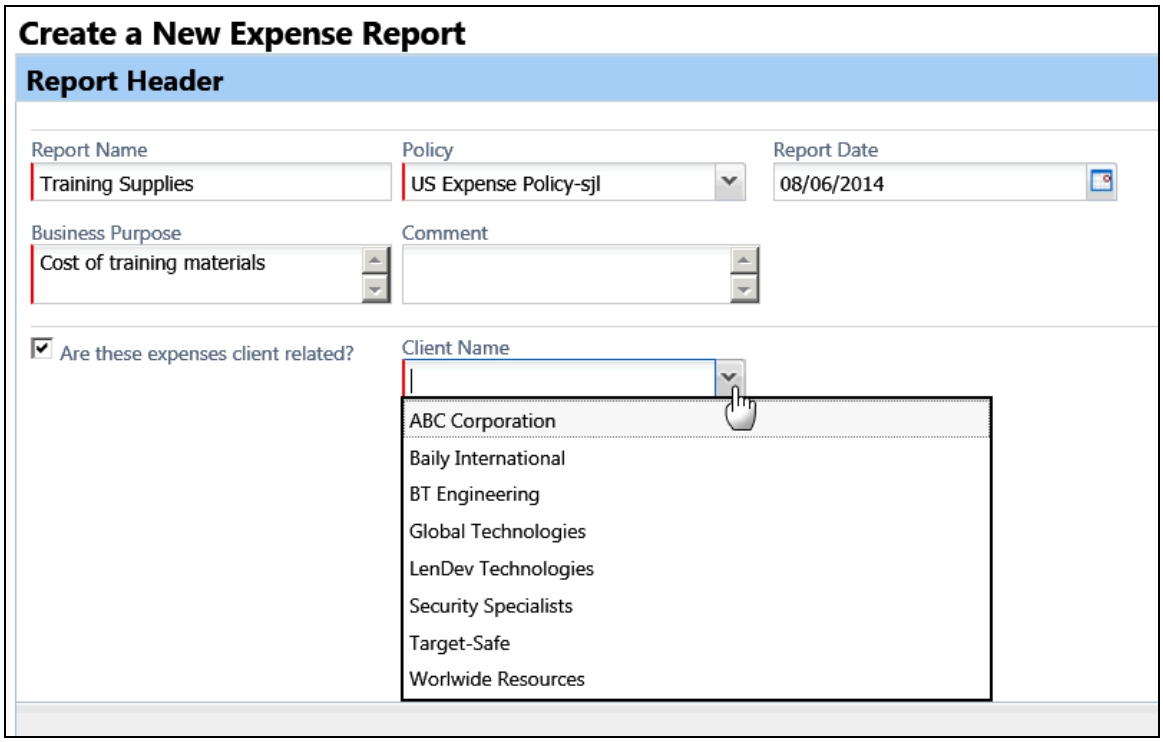
The admin had added the **Are these expenses client related?** check box to the report header.



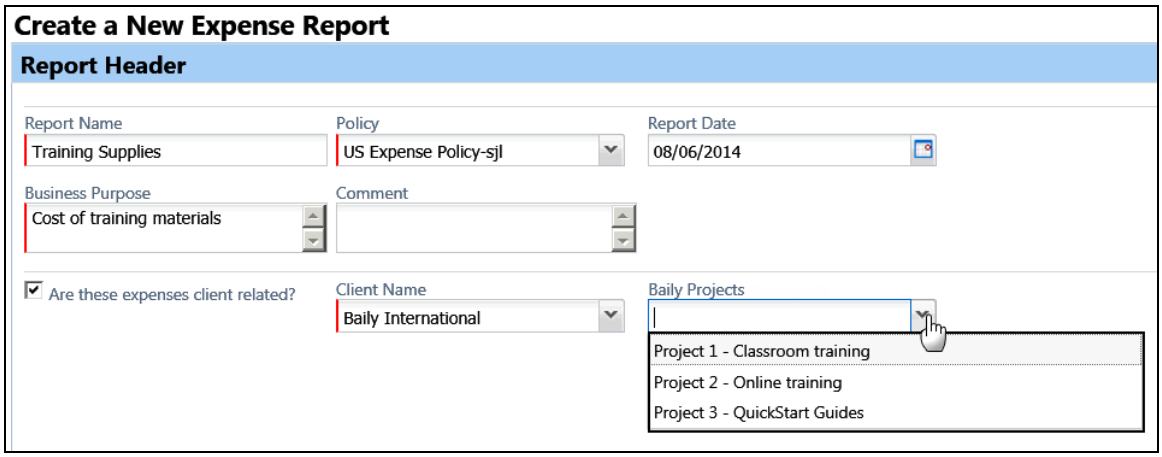
If the user selects the check box, the **Client Name** field appears.



The user chooses the appropriate client name from the **Client Name** list.



For this company, if the user selects **Baily International**, a third field appears, from which the user selects the appropriate project.



Restrictions and Considerations

For this initial release, conditional fields:

- Can be used only for these form types:
  - Expense report header
  - Expense entry
- Cannot be used with connected lists

Additional forms and features will be added in future releases.

Note the following:

- The source field will evaluate even if it is hidden (that is, it is hidden but is populated by copy down).
- The target field will honor the visibility defined for the role (that is, a field defined as hidden for an approver will remain hidden from the approver).
- A once-visible field can become hidden due to conditional logic. For example, the user selects the check box, the second field (text box) appears, and the user enters the appropriate text. Later, the user clears the check box, resulting in the second field now being hidden. In this case, Concur will reset the second field to its original state, for example:
  - We will clear the value typed on the second field.
  - If the field was originally populated with a copy-down value, we will populate the field with that value.
- Using the same sample as above, if a ***required*** field becomes hidden due to conditional logic, it will no longer be required.

Configuration / Feature Activation

Clients interested in using this feature must contact Concur Client Support for assistance.

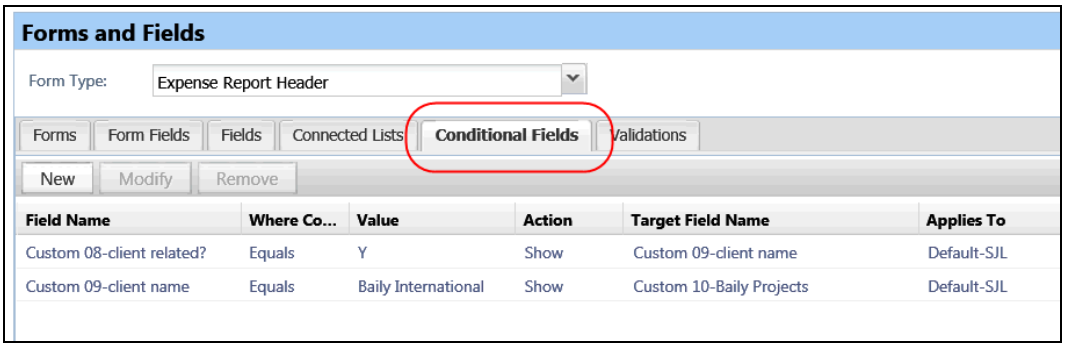
Concur will follow the configuration/activation steps noted below.

To create conditional fields:

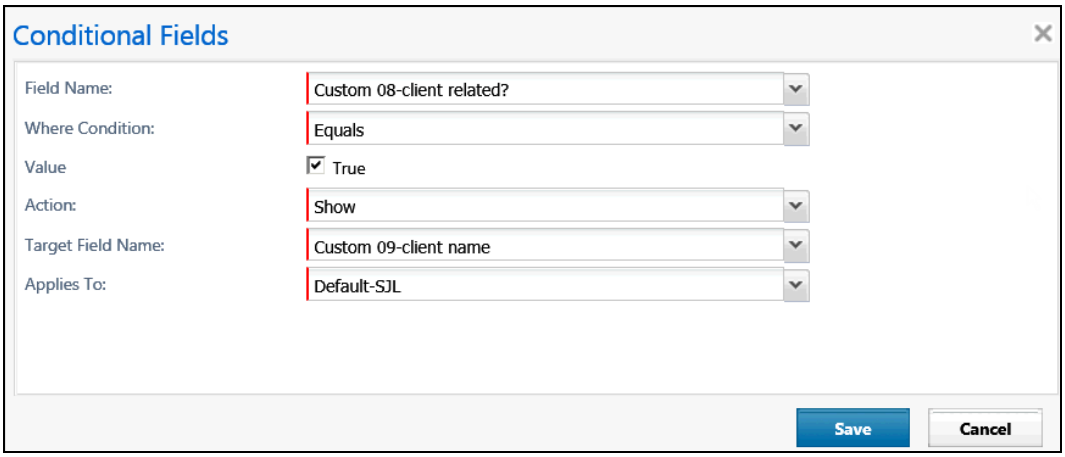
1. Click **Administration** > **Expense Admin** > **Forms and Fields** (left menu).
2. In the **Form Type** list, click either *Expense Entry* or *Expense Report Header*.
3. Select the desired form and ensure that all source fields and target fields:
   - ***Are included on the desired form***
   - Have the desired visibility, data type, associated list data, etc.

   NOTE: Currently, connected lists cannot be used.

4. Click the **Conditional Fields** tab.



5. To create a conditional field, click **New**. The **Conditional Fields** window appears.



6. Complete the appropriate fields.

Field	Description
Field Name	Select the source field. **NOTE:** Fields will not appear in this list unless they are present on a form definition for the relevant form type. Ensure that all desired fields are present on the form before configuring the condition.
Where Condition	Select the desired option (differ by field type).
Value	This field changes depending on the data type of the source field, for example: • For text fields, enter the desired text. • For lists, select the list item. • For check boxes, select the check box (indicating True)
Action	Select one of these: • Show • Hide
Target Field Name	Select the desired target field.
Applied To	Select the desired form.

7. Click **Save**.

Japan Public Transportation (JPT): Jorudan Maintenance

Overview

The JPT database of stations and lines received routine maintenance changes including additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Administrator Sees

The company administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

JORUDAN ADDITIONS

Station	Action	Line
NAKAMACHI	added to	CHITETSU TOYAMA LINE (STREETCAR)
SHIN-AINOKI	added to	CHITETSU LINE
KISEKI NO IPPONMATSU	added to	OFUNATO LINE
AJIGASAWA	added to	GONO LINE

Station	Action	Line
MOIWA CHUFUKU	added to	MOIWAYAMA ROPEWAY
MOIWA SANCHO	added to	MORISS CAR
MOIWA SANROKU	added to	MOIWAYAMA ROPEWAY
SENGATAKI	added to	SHOSENKYO ROPEWAY
DOAIGUCHI	added to	TANIGAWADAKE ROPEWAY
TENJINDAIRA	added to	TANIGAWADAKE ROPEWAY
OKUNOIN	added to	MINOBUSAN ROPEWAY
SANCHO (HAKODATEYAMA)	added to	HAKODATEYAMA ROPEWAY
SANCHO (SENKOJIYAMA)	added to	SENKOJIYAMA ROPEWAY
SANCHO (BIZAN)	added to	BIZAN ROPEWAY
SANROKU (HAKODATEYAMA)	added to	HAKODATEYAMA ROPEWAY
SANROKU (SENKOJIYAMA)	added to	SENKOJIYAMA ROPEWAY
SANROKU (BIZAN)	added to	BIZAN ROPEWAY
KAYATANI	added to	MIYAJIMA ROPEWAY
KAKONISHI	added to	ASOSAN ROPEWAY
SHISHIIWA	added to	MIYAJIMA ROPEWAY
HAKONE-EN	added to	HAKONEKOMAGATAKE ROPEWAY
MOMIJIDANI	added to	MIYAJIMA ROPEWAY
ASOSANNISHI	added to	ASOSAN ROPEWAY
KOMAGATAKE CHOJO (HAKONE)	added to	HAKONEKOMAGATAKE ROPEWAY

JORUDAN UPDATES

Station	Action	Line
HAMAMATSUDAIGAKU-MAE	renamed to	TOKOHADAIGAKU-MAE
ENSHU-KAMIJIMA	renamed to	KAMIJIMA
ENSHU-HIKUMA	renamed to	HIKUMA
TSUTSUI	renamed to	TSUTSUI (NARA)

JORUDAN REMOVALS

Station	Action	Line
NISHI-KAWAGOE	removed from	SAIKYO LINE
MATOBA	removed from	SAIKYO LINE
KASAHATA	removed from	SAIKYO LINE

Station	Action	Line
MUSASHI-TAKAHAGI	removed from	SAIKYO LINE
KOMAGAWA	removed from	SAIKYO LINE
NARITA-AIRPORT	removed from	SOBU LINE (RAPID)
AIRPORT TERMINAL 2	removed from	SOBU LINE (RAPID)
NARITA	removed from	SOBU LINE (RAPID)

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

New Setting to Limit Number of Requests Associated with a Single Expense Report

Overview

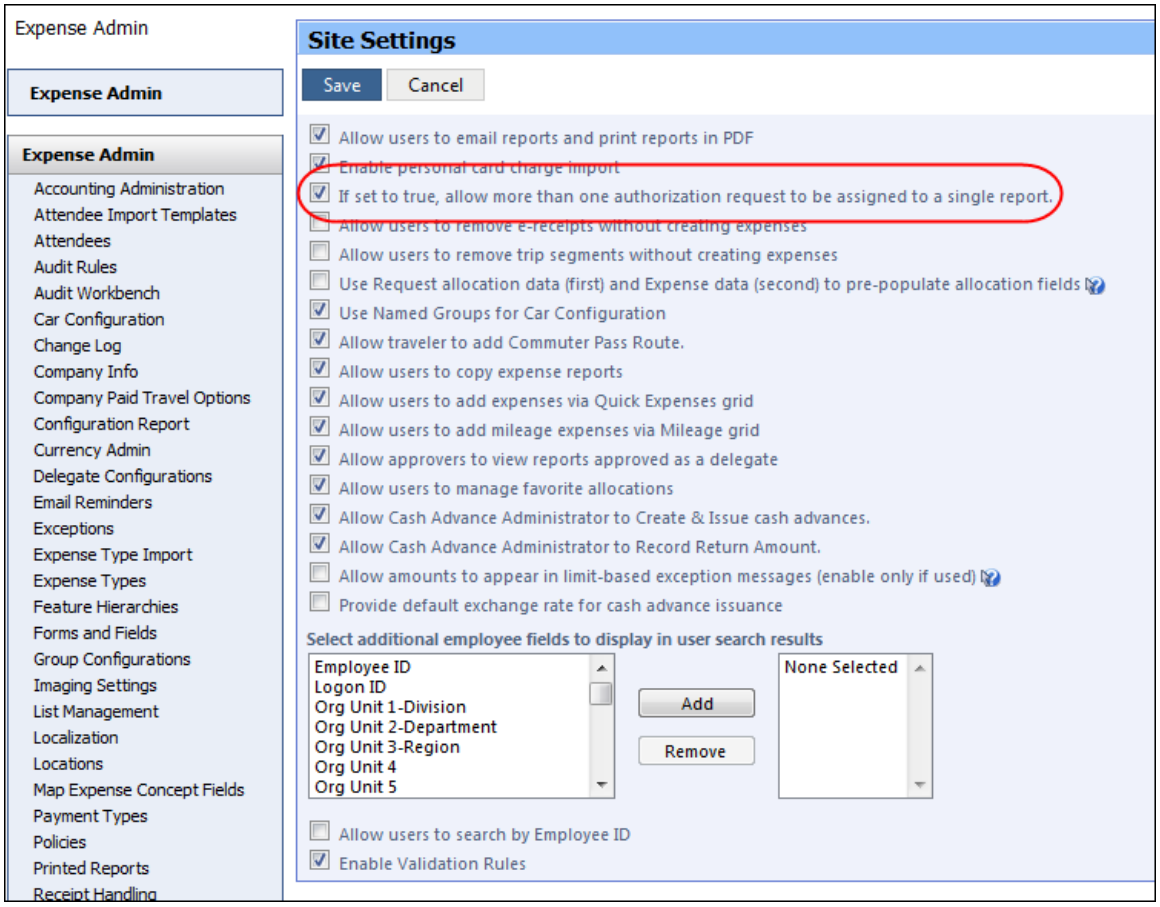
Clients who are using Request integrated with Expense now have the ability to set whether users are allowed to associate more than one request with a single expense report.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement gives clients increased control over the association of requests to reports.

Configuration / Feature Activation

The setting is available on the **Expense Admin** > **Site Settings** page. This setting is set to True (selected) by default.



Coming Soon Attendee Enhancement

Overview

A minor change to the attendee table is coming in the September release. The name of the attendee will be a clickable link to open the attendee record in view or edit mode, as is applicable to the circumstances. There are no other changes to the current user interface.

In tests with current users, these changes were readily understood without any training or explanation. We anticipate that no change management will be necessary; however, those clients with regulatory requirements around attendees may elect to advise users about this change.

Enhanced User Interface

In the enhanced user experience, the user will see minor changes to the order of the buttons and how they collapse when the screen is narrowed.

More Information

More information will be available in next month's release notes.

Coming Soon Card Programs: Fleet/Fuel Card Processing

Overview

Concur is pleased to announce that – for clients who use the WEX Fleet Card (formerly the Wright Express Universal Fleet Card) – Concur will soon provide processing for fleet/fuel card transactions.

There will be three types of card programs:

- **Driver card:** Card assigned to a specific driver, to be used for all fleet/fuel transactions incurred by that driver in any vehicle

  The card accounts are assigned directly to the driver, who can see and manage the charges just like any other Corporate or Purchasing Card.
- **Vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver

  For these accounts, the driver must enter his/her driver ID at the pump or point-of-sale. Concur will import the card charges and – using the driver ID – route them to the appropriate Concur user (driver).
- **Managed vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver but all transactions are managed by a single client-defined driver/employee.

  The card accounts are assigned directly to the driver/employee, who can see and manage the charges just like any other Corporate or Purchasing Card.

Note the following:

- This is a no-fee service available only to clients who use WEX Fleet Card (formerly the Wright Express Universal Fleet Card). Additional fleet cards will be available in the future.
- The fleet/fuel transactions appear to the user in Expense just like other card charges.

Receipt Store

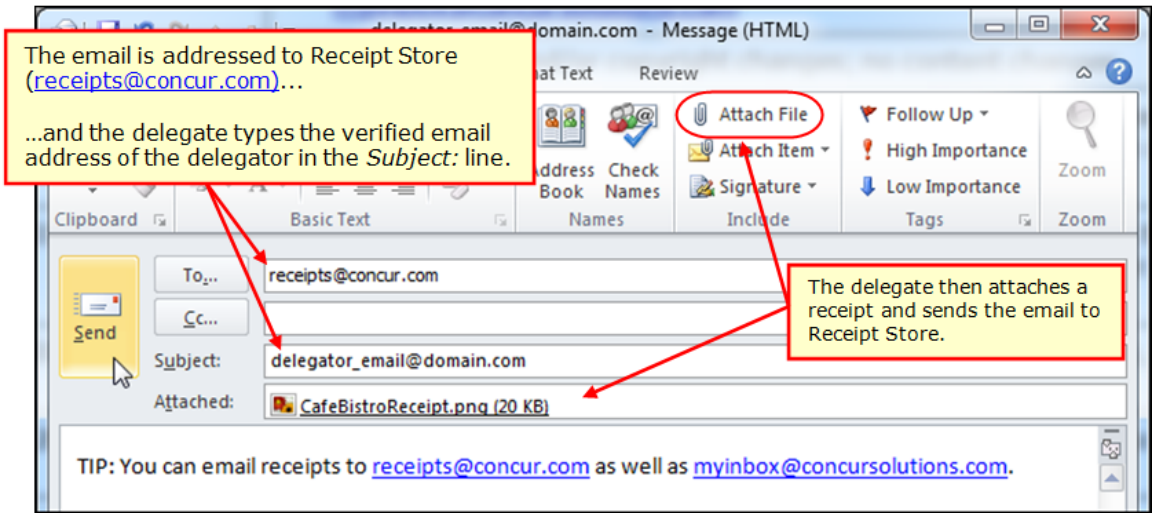
Clarification

In February, we included a release note about the Receipt Store and delegates. The process has not changed. This release note clarifies how Concur processes the image.

To send receipt images to the user's Receipt Store repository:

1. Prepare the email and attach or embed the receipt image.
2. Type the validated email address of the user (delegator) in the Subject line.

3. Send the email.



The system:

- Confirms that both the delegate sending the email and the user in the subject line (delegator) have verified Receipt Store email addresses
- Confirms that a delegate-to-delegator relationship exists between the sender (delegate) and the user in the subject line (delegator)

Then:

- If ***both*** verification steps are found to be true, the image is added to the *user's* repository.
- If the sender is not the delegate *of the* user in the subject line (delegator), the image is added to the *delegate's* repository.
- If the delegate does not have a verified email address, the email is discarded.

User Interface

New Site Timeout Warning

Overview

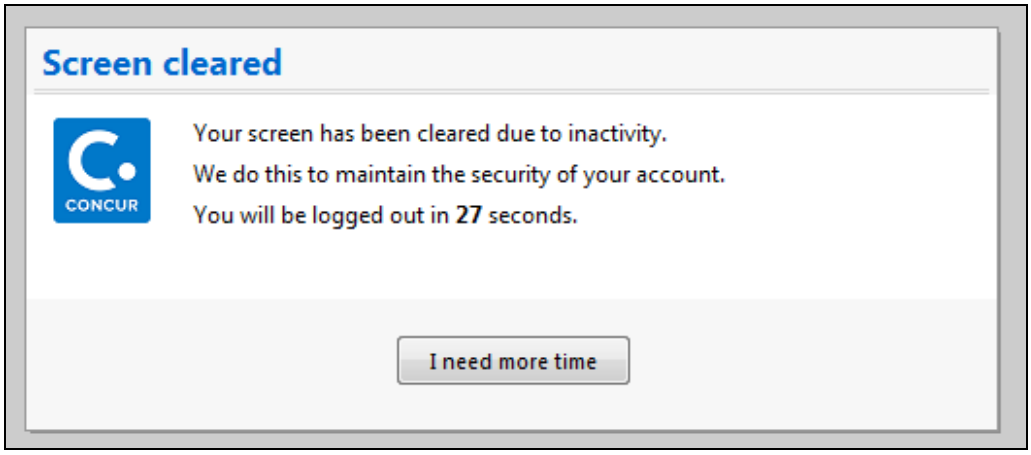
Concur now displays a new popup that allows a user to extend their session when a time-out is imminent.

This feature does not change any existing session timeout settings- it simply adds a new warning dialog in place of the existing page when the timeout is approaching that allows the user to request more time.

USER/CUSTOMER BENEFIT

People with disabilities such as blindness, low vision, dexterity impairments, and cognitive limitations may require more time to read content or to perform functions such as filling out online forms. If Web functions are time-dependent, it will be difficult for some users to perform the required action before a time limit occurs. This may render the service inaccessible to them. This feature allows the users to request additional time to complete their actions.

What the User Sees



If the user clicks **I need more time** within the allowed time interval, they will resume their Concur session, with the session timeout countdown restarted.

If the user does not take action before the timeout interval, the user will be logged out of the system and returned to the login page. Companies configured to use Single Sign On (SSO) will return to the company-defined timeout page for their company.

NOTE: The timeout period is configured by client, and can range between 30-120 minutes. The popup appears halfway through the timeout period, and remains up until the session timeout period completes.

Configuration/Feature Activation

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

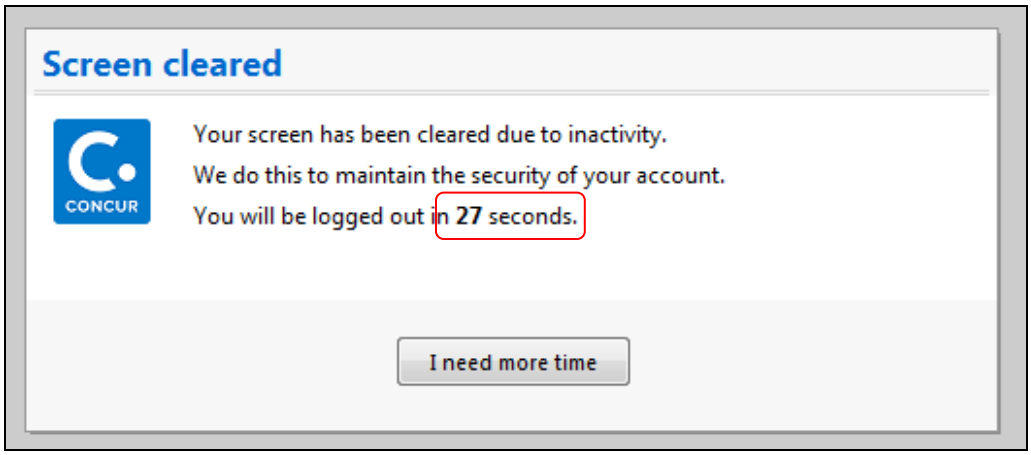
Optional Configuration Setting

NOTE: This setting is configured by Concur. Contact Concur Client Services to update this setting for your company.

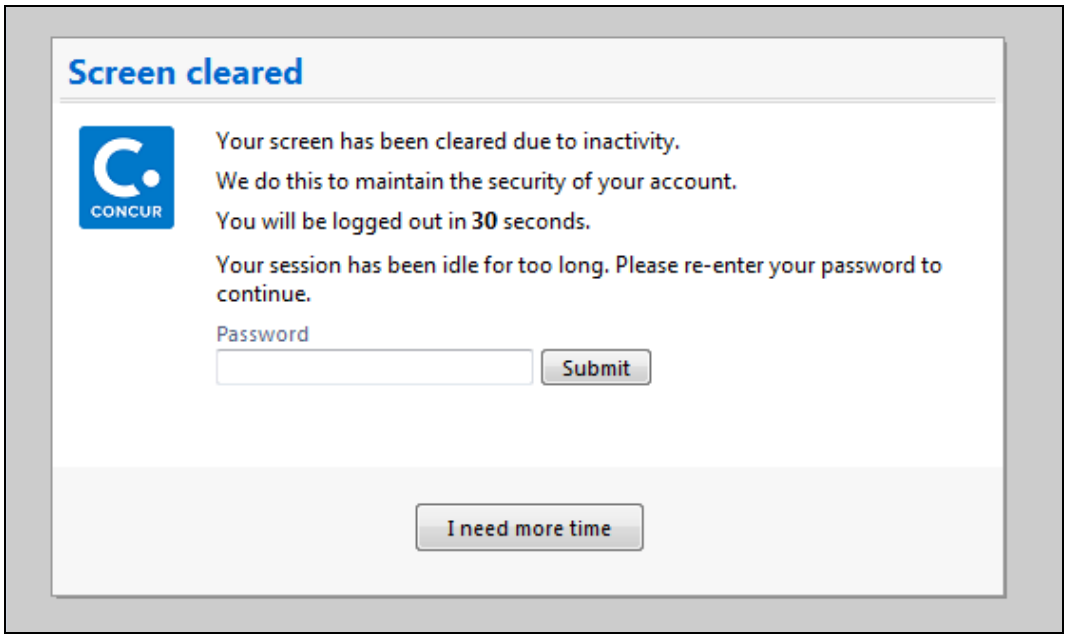
A company may optionally elect to enable an additional layer of security. A new idle time setting defines the period of time from the appearance of this dialog that the

user has to click **I need more time** on the timeout dialog independently from the full session timeout.

NOTE: This setting is not recommended for clients with SSO. If users are not familiar with their login passwords, the company should not enable this setting.



When this time is exceeded without the user clicking the **I need more time** button, the account will be locked and the user will see a password entry field to allow re-authentication from the current dialog.



The user must re-enter his/her password and click **Submit** to unlock the account and re-activate the session. Users who require additional time to complete entry of their password may click **I need more time** to extend the time permitted to accomplish this re-activation task.

The user may make three attempts to correctly enter their password and re-activate the session; after the third unsuccessful attempt the user is logged out

If this re-authentication occurs before the session timeout interval expires, then the session will be restored. If the session times out, then the user is returned to the login page.

Coming Soon The Concur User Experience Evolution – Professional Edition

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

---

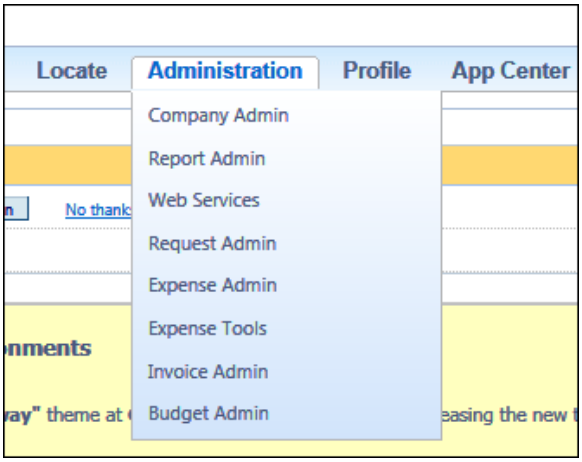
NOTE: As the availability period approaches, you will receive more information (and screen samples) about how these tasks are completed.

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.

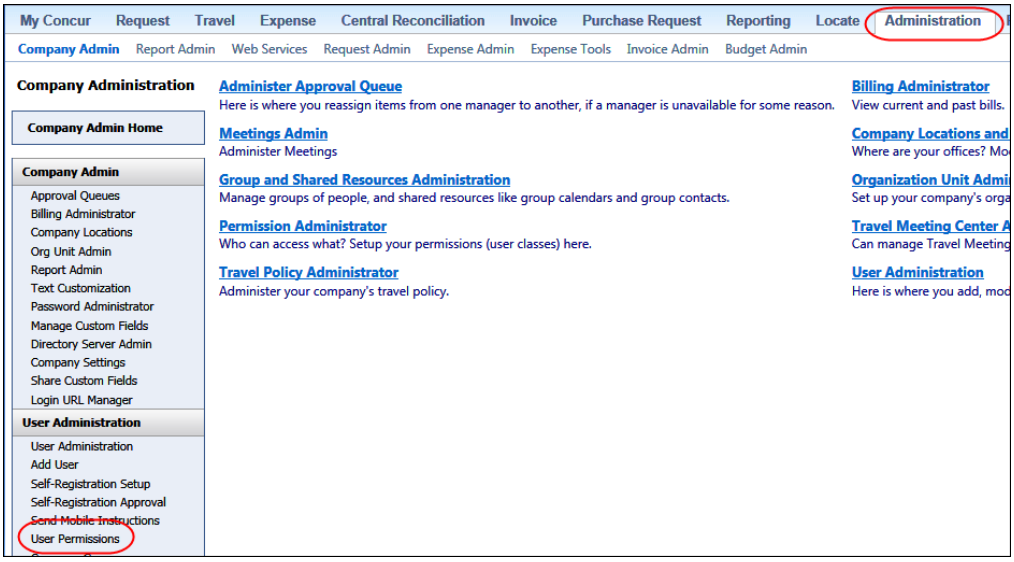


By Selected Users

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.

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.

Expense Pay

Denmark In-Country Payments Now Available

Overview

In the August 2014 release, Expense Pay EMEA now supports payments in Danish Krone (DKK). Denmark payment capabilities offer a fully managed, in-country payment service.

- Funding currency is in Danish Krone (DKK) and is obtained via Direct Debit, drawing funds from the company's designated (DKK) funding account. Concur does not allow clients to wire or push funds to Concur.
- All payments generated in Denmark are made in Danish Krone (DKK).
- The client's funding bank and the payee's bank account must be domiciled in Denmark.
- Payments are made via credit transfer transactions.
- Concur will reimburse the client's expense claim filers and schedule payment to American Express Individual Bill/Central Pay (IB/CP) programs.
- Payment Cycle is 4 banking days.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement expands the Expense Pay EMEA service to a new currency.

Configuration/Feature Activation

This feature is available to clients who have purchased Expense Pay – EMEA.

📖 For more information, refer to the *Expense: Expense Pay User Guide* and the *Expense: Payment Manager User Guide*.

Supported Configurations

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, Webinars, and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

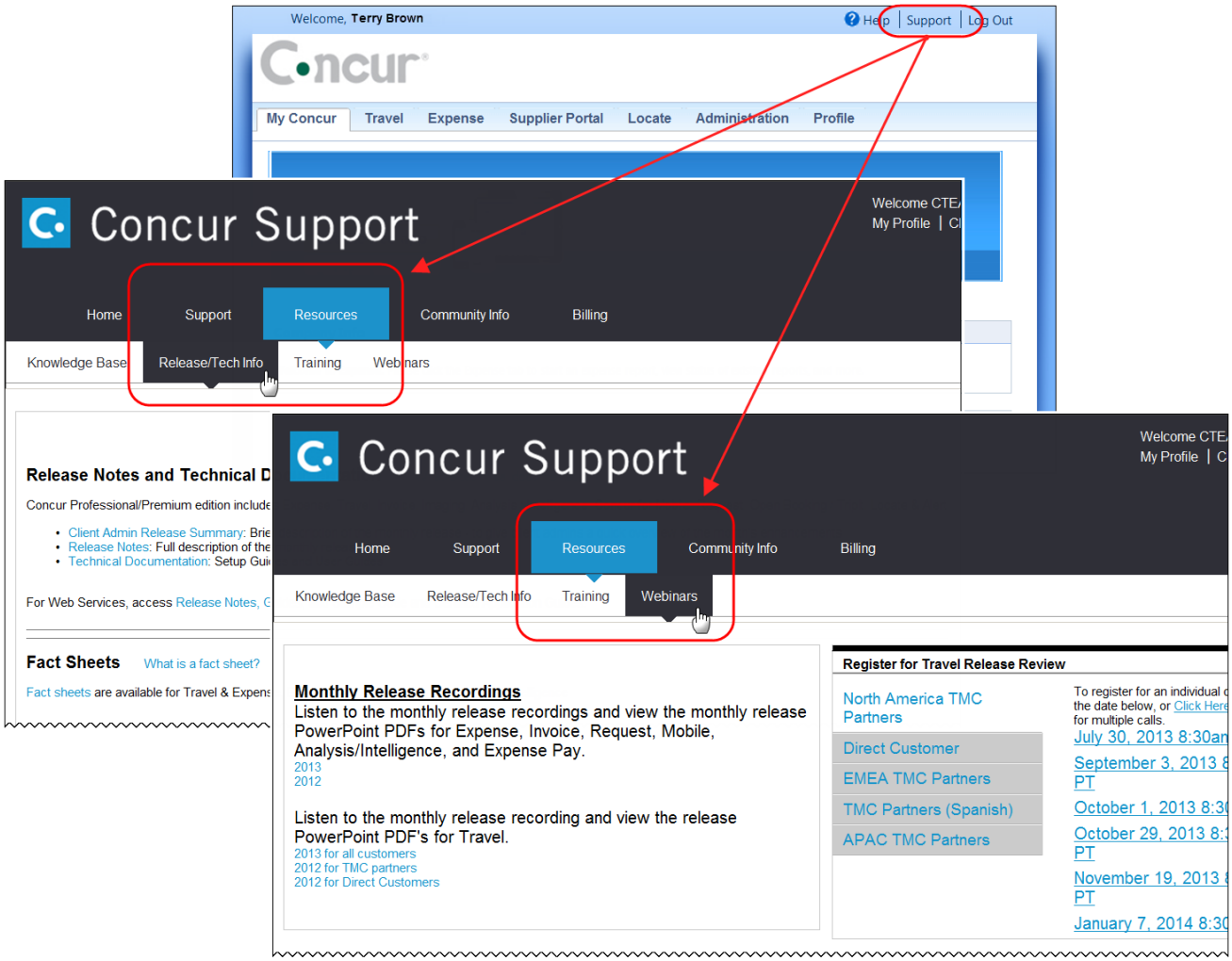
Additional Release Notes, Webinars, and Technical Documentation

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**.

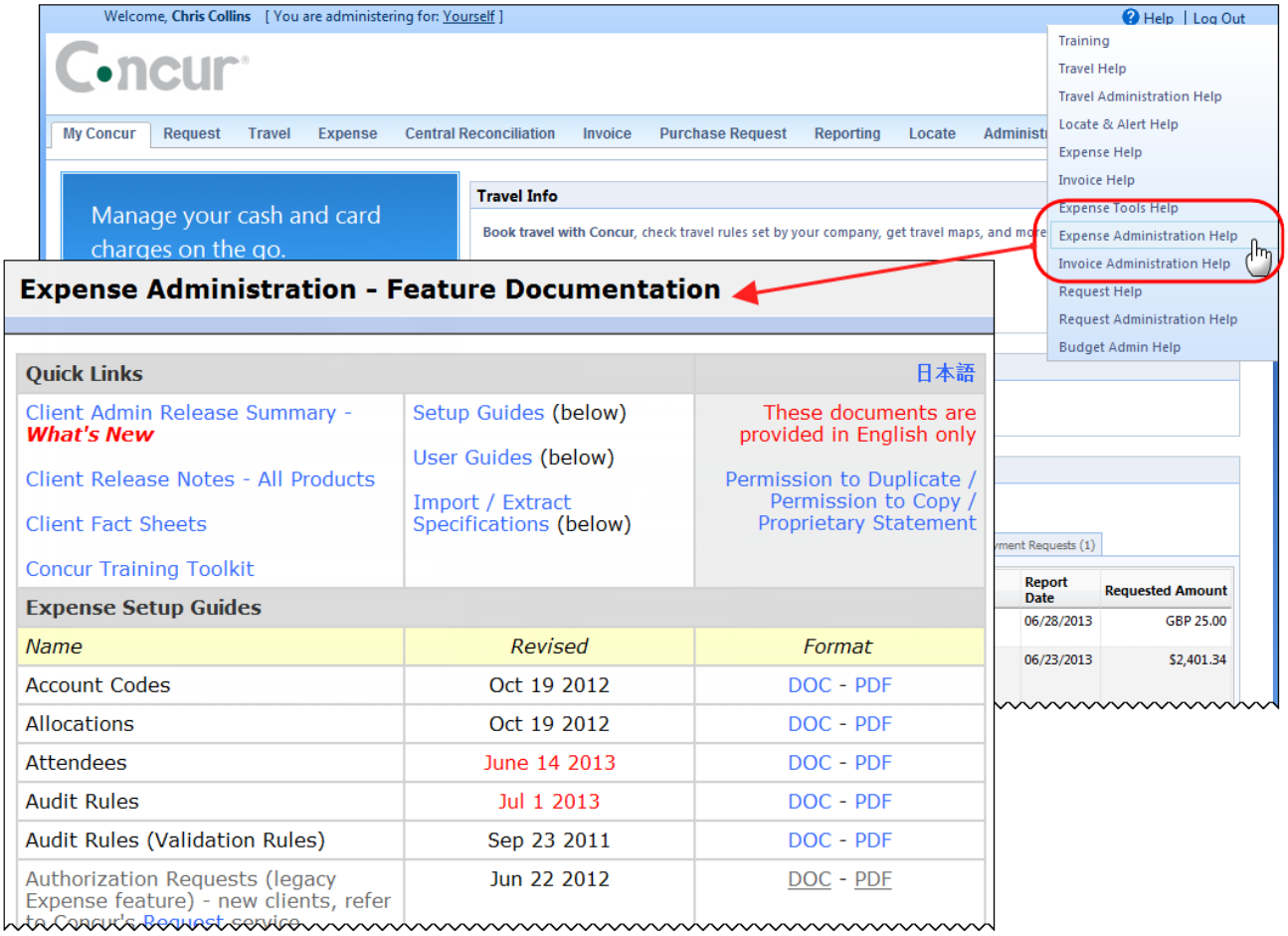
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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.



Concur Release Notes **Expense Professional / Premium** Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	**Audience**
September 2014 Update #1: Friday, September 12, 4:00 PM PT	Client ***FINAL***

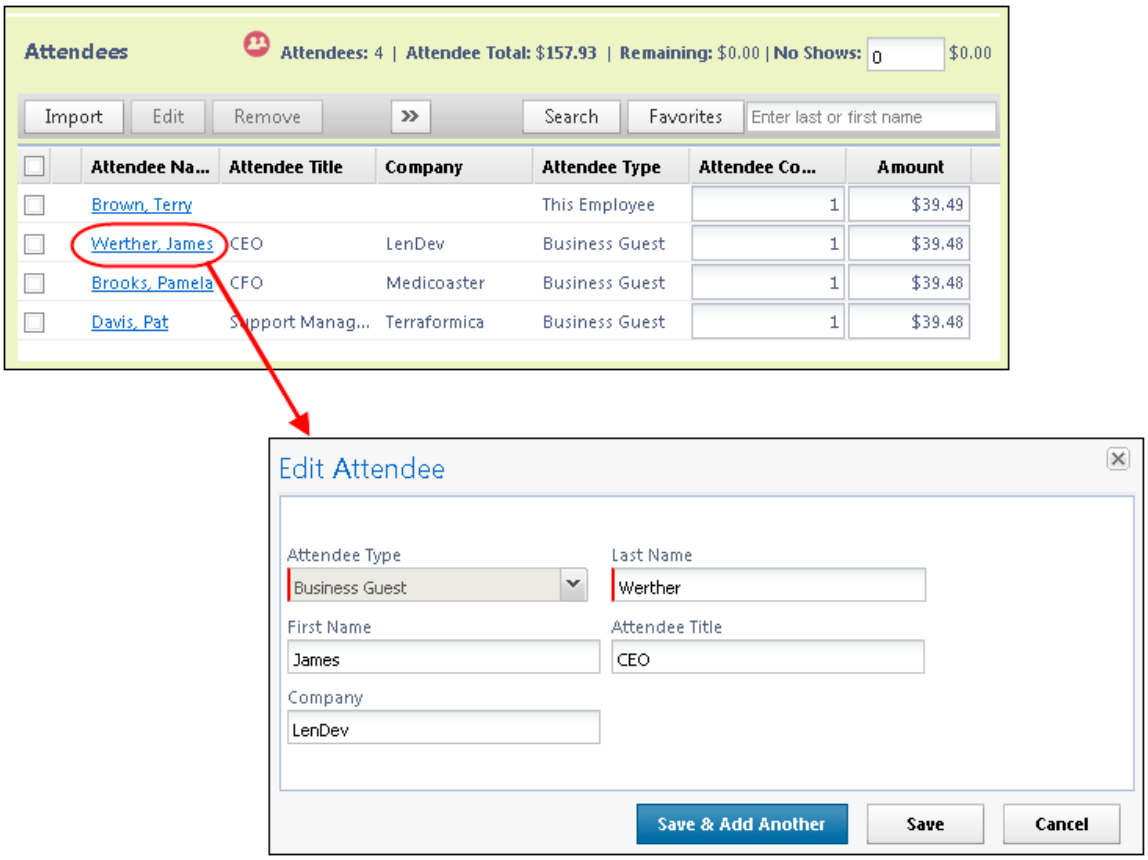
Contents

Release Notes

Expense

Attendee Section Update

In the September release, Concur has updated the Attendee section that appears on the expense entry, request entry, and legacy authorization request entry pages. The attendee name is now a clickable link. When the user clicks on it, the attendee details appear. If the user is able to edit the attendee, the attendee information will be editable in the window. If the user is not able to edit the attendee, the information will be read-only.



Business Purpose / Client Benefit

This enhancement makes managing attendees easier.

Configuration/Feature Activation

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

Japan Public Transportation (JPT): Trip Duration Displayed as Hours and Minutes

The Japan Public Transportation (JPT) route search results now display time in hours and minutes. For example, rather than displaying 91 minutes, the route search displays 1 hour and 31 minutes.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement makes the route search easier for users to understand.

Configuration/Feature Activation

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

Coming Soon Training Admin: New Training Materials

With the October release, the training content that is available through the Training Admin tool will be replaced. New content that matches the Concur User Experience Evolution will replace the existing training content. If you have created a custom training toolkit for your company, the content on that toolkit will be automatically updated to the new demos and guides. We encourage you to review and update your custom training toolkit after the October release to add and update items based on the new content.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides helpful training content to introduce users to the enhanced user interface.

Configuration/Feature Activation

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

Coming Soon Card Programs: Fleet/Fuel Card Processing

Concur is pleased to announce that – for clients who use the WEX Fleet Card (formerly the Wright Express Universal Fleet Card) – Concur will soon provide processing for fleet/fuel card transactions.

There will be three types of card programs:

- **Driver card:** Card assigned to a specific driver, to be used for all fleet/fuel transactions incurred by that driver in any vehicle

The card accounts are assigned directly to the driver, who can see and manage the charges just like any other Corporate or Purchasing Card.

- **Vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver

  For these accounts, the driver must enter his/her driver ID at the pump or point-of-sale. Concur will import the card charges and – using the driver ID – route them to the appropriate Concur user (driver).

- **Managed vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver but all transactions are managed by a single client-defined driver/employee.

  The card accounts are assigned directly to the driver/employee, who can see and manage the charges just like any other Corporate or Purchasing Card.

Note the following:

- This is a no-fee service available only to clients who use WEX Fleet Card (formerly the Wright Express Universal Fleet Card). Additional fleet cards will be available in the future.
- The fleet/fuel transactions appear to the user in Expense just like other card charges.

UK VAT: HMRC Advisory Fuel Rate Updated

Overview

New HMRC Advisory Fuel rates, effective from 01/09/2014 and applicable to diesel engines, are now in effect with this service release.

There are two changes to note

- For an engine size of 1600cc or less, the fuel rate has decreased from 12p to 11p per mile
- For an engine size of 1601cc to 2000cc, the fuel rate has decreased from 14p to 13p per mile.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement updates Expense to match the latest UK government regulations.

Configuration/ Feature Activation

The change applies on release to Guaranteed Compliance clients. All other clients wanting to take advantage of these changes will need to configure this change using the Expense Tax Group mapping tool.

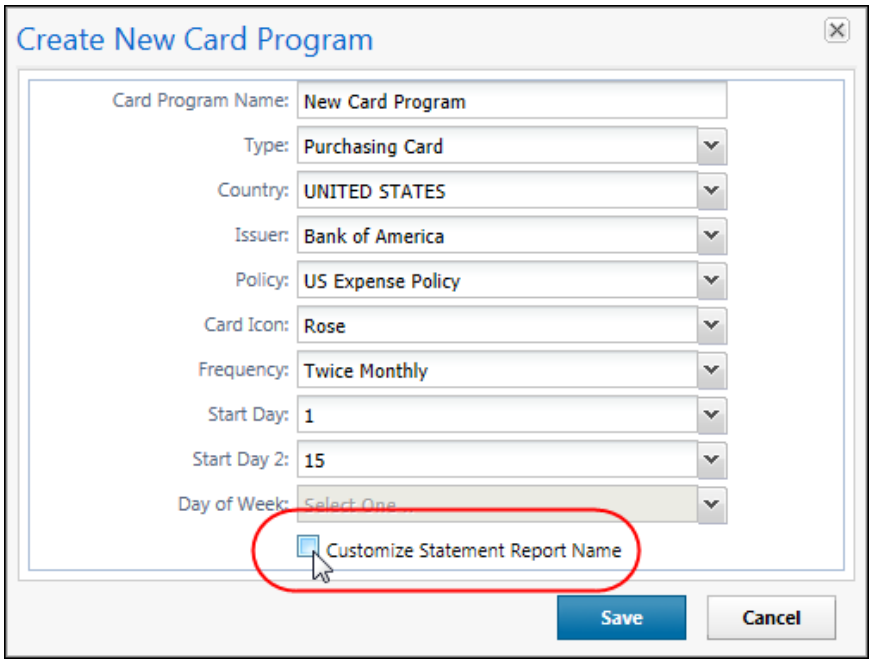
📖 For more information refer to *Expense: Value Added Tax (VAT) / Tax Administration Setup Guide*.

Purchasing Card: Set a Customized Statement Report Name

Overview

Currently when a statement report is generated, it is titled simply "Statement Report" with the date of the report appended to the name. For clients who configure multiple accounts and thus generate multiple reports, it can be difficult to clearly determine what account, and what date, the report is associated with.

To prevent possible confusion and remove the need to manually rename the report after it is generated, a new option, **Customize Statement Report Name**, lets the Card admin customize of the report name and include additional clarifying information.

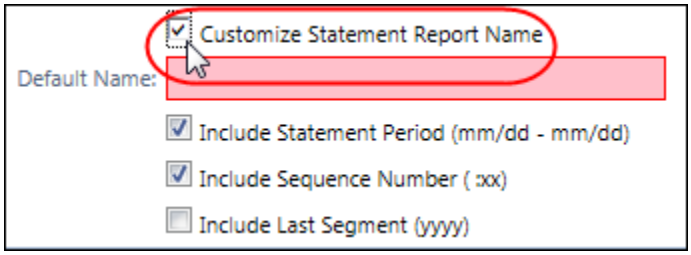


BUSINESS PURPOSE/CLIENT BENEFIT

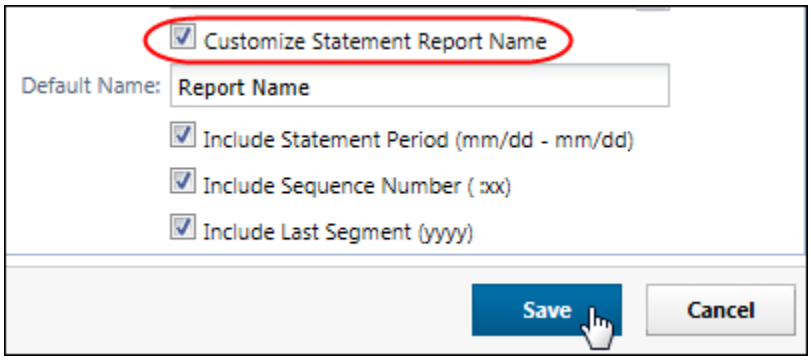
This enhancement provides greater clarity when dealing with multiple statement reports, often under a weekly timeframe, by adding optional information to the name of the report on generation.

How It Works

By selecting (enabling) this option, a new section appears that allows the Card admin to refine the name generated by the system, and include or exclude additional information within the naming convention.



For example, in the figure below, all options have been selected so that the entire naming convention will be applied to the statement report "Report Name":



The resulting name for a second statement report in sequence would be "*Report Name 09/01 – 09/15 :02 0123*"

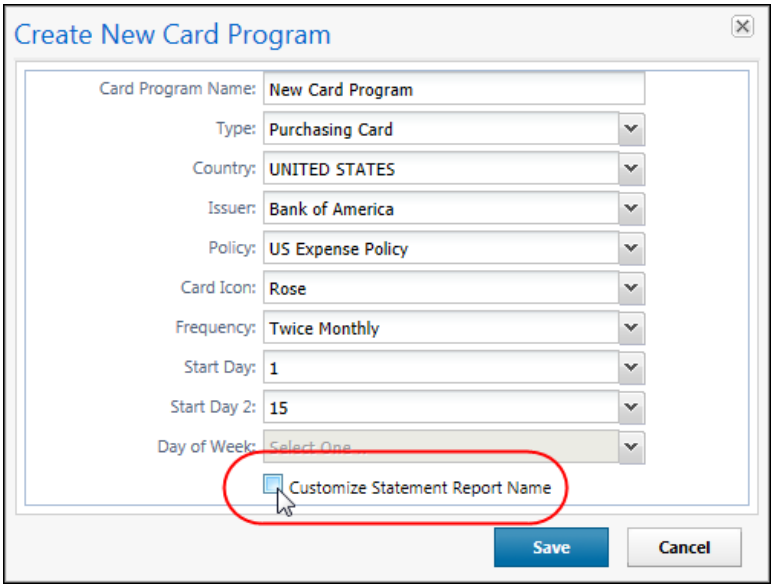
What the Card Administrator Sees

The Company Card administrator will now see the new option, and the corresponding section when they select the option to activate the customization for naming.

Configuration/ Feature Activation

- ***To enable and use the custom statement report naming option:***

1. Click **Administration** > **Expense Tools** > **Company Card** > **Manage Card Programs** tab.
2. Click **New** (used below), or **Modify** if an existing account.
3. In the **Create New Card Program** window, fill out the card account information, then select (enable) the **Customize Statement Report Name** check box.



4. Fill out the following options:

Name	Description
Default Name	The name, up to seventeen characters, that will be used for all statement reports generated under this account.
Include Statement Period	(Default = On) Include the start and end date of the statement report data ("mm/dd – mm/dd").
Include Sequence Number	(Default = On) Include a sequential incremental number in the name, such as ":02 or :03" to show the sequence if multiple reports are generated (for example, daily).
Include Last Segment	Include the last four numbers of the card account number.

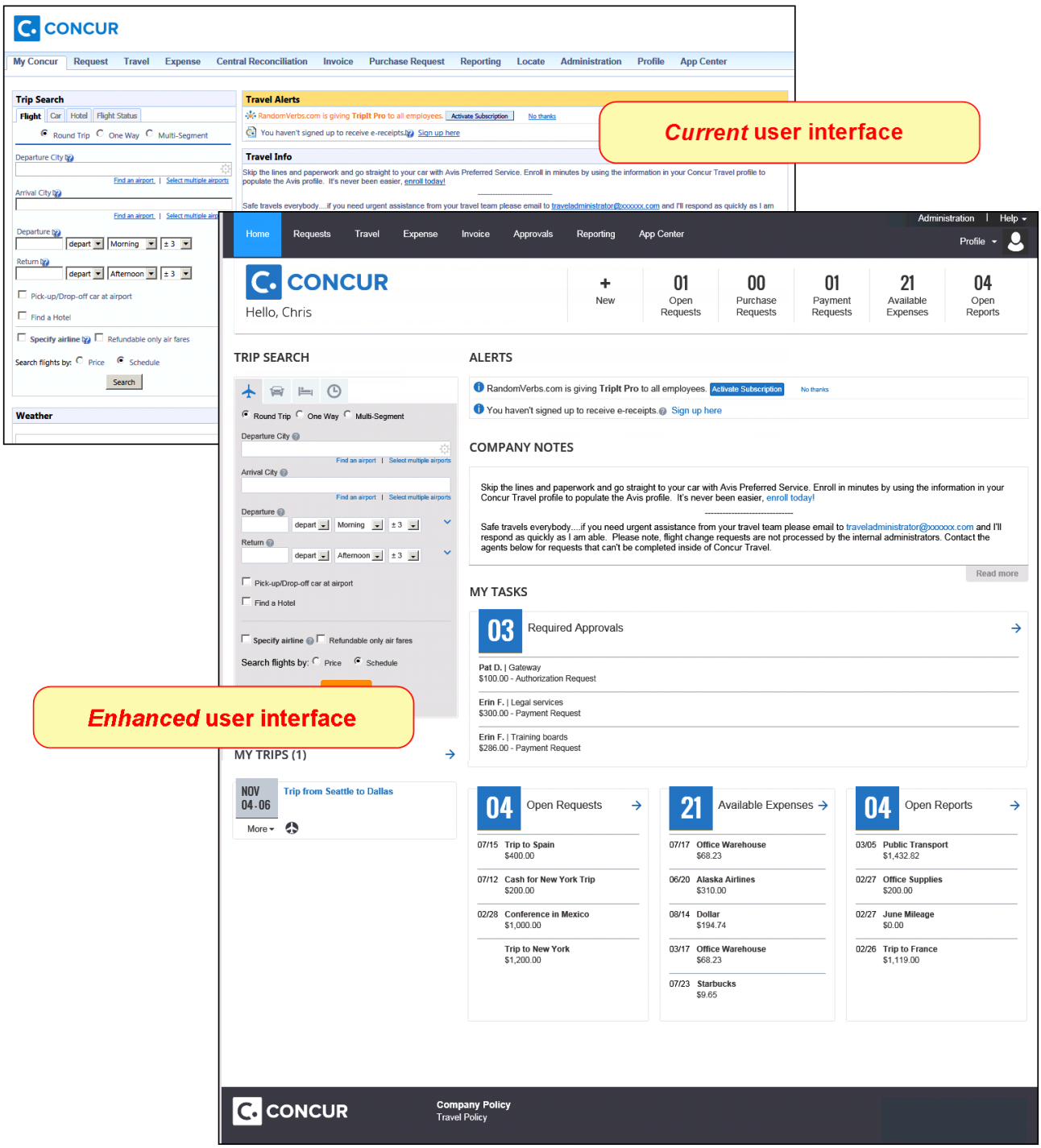
5. Click **Save**.

For more information refer to *Expense: Company Bill Statement Reports Setup Guide*.

User Interface

Two User Interfaces – Enhanced UI

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



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

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).

Coming Soon Attendee Section Updates

The Enhanced UI includes some changes to the functionality of the Attendee section that appears on the expense entry, request entry, and legacy authorization request entry pages. The attendee section changes include:

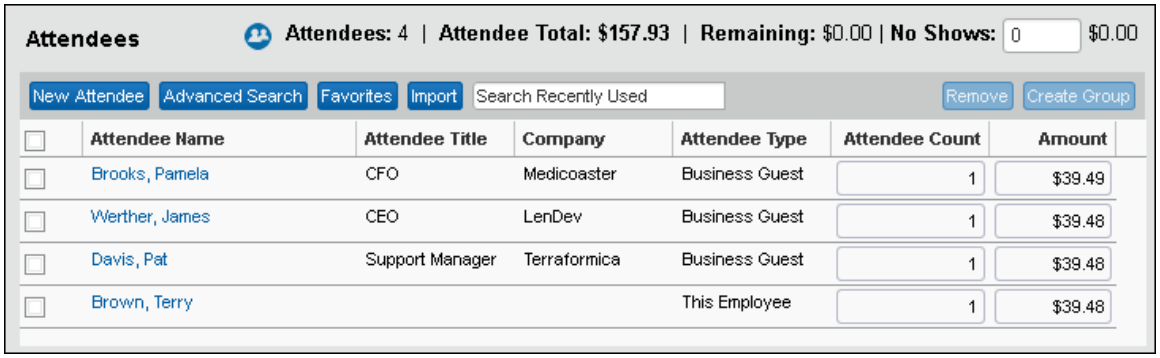
- The attendee buttons have been re-arranged
- As the browser size is reduced, the attendee button bar can now collapse from both the right and the left side to compensate

Button Order Change

The buttons on the top edge of the attendee section have been re-arranged.

Current UI:

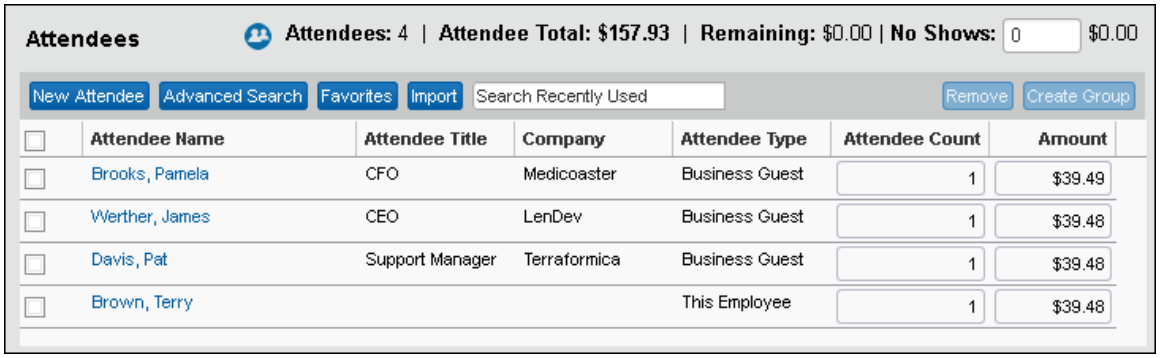
Enhanced UI:



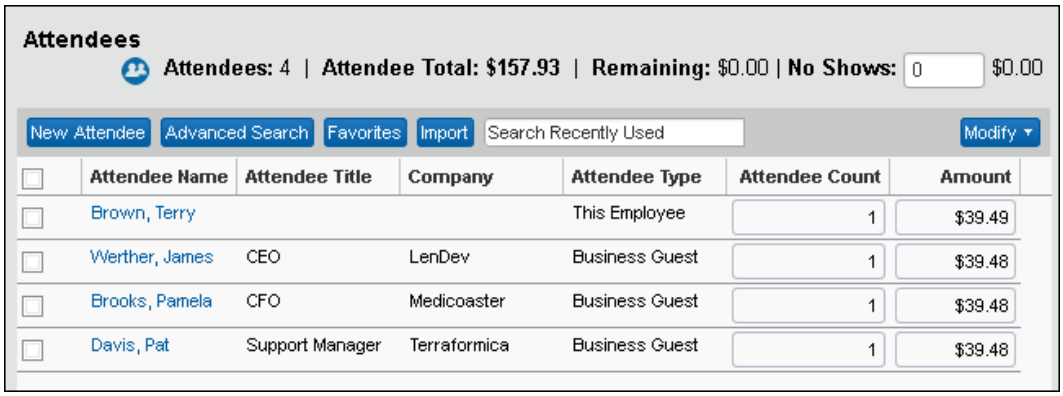
Browser Size Adjustment

As the user's browser window width is adjusted, the buttons in the attendees section collapse from both ends.

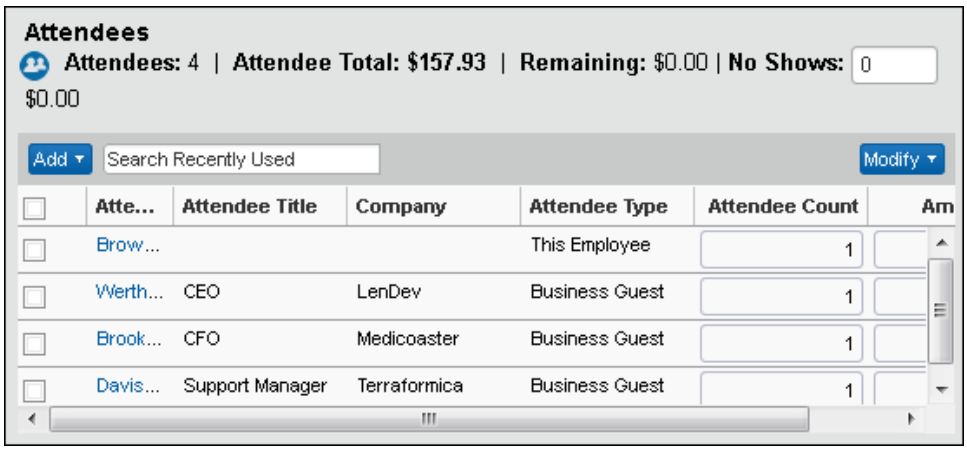
Full width:



Medium width (one side collapsed):

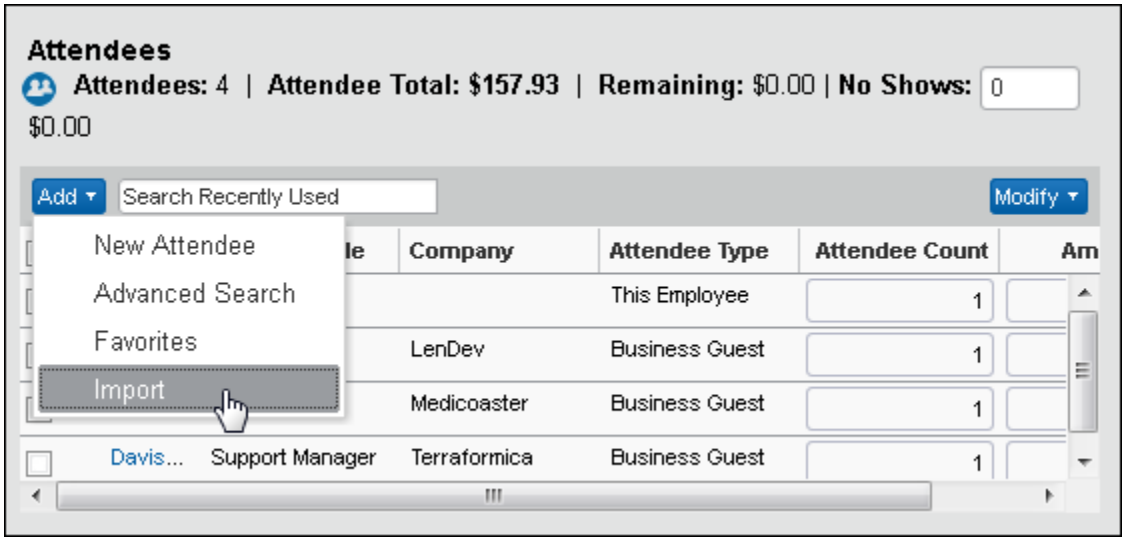


Small width (both sides collapsed):

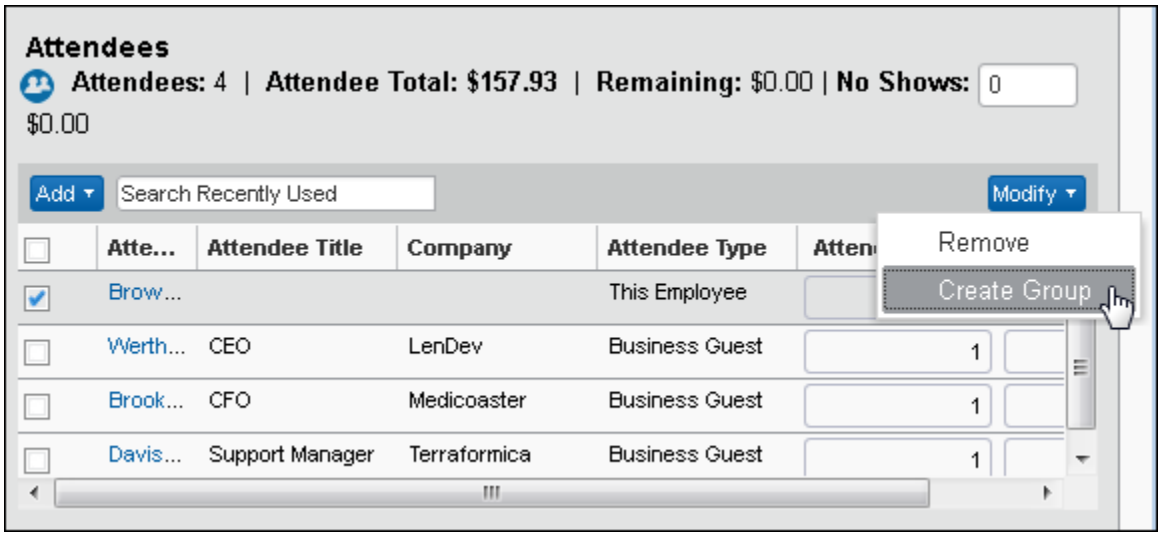


At the smaller widths, the buttons are moved under the **Add** and **Modify** menus.

Add:



Modify:



BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement moves frequently used functionality forward, and supports multiple browser sizes on multiple devices, like tablets.

Configuration/Feature Activation

This feature is part of the enhanced UI. Once the enhanced UI is activated, the feature is automatically on; there are no additional configuration or activation steps.

Central Reconciliation

Support for CR Management of TMC-Generated Account Feeds

Overview

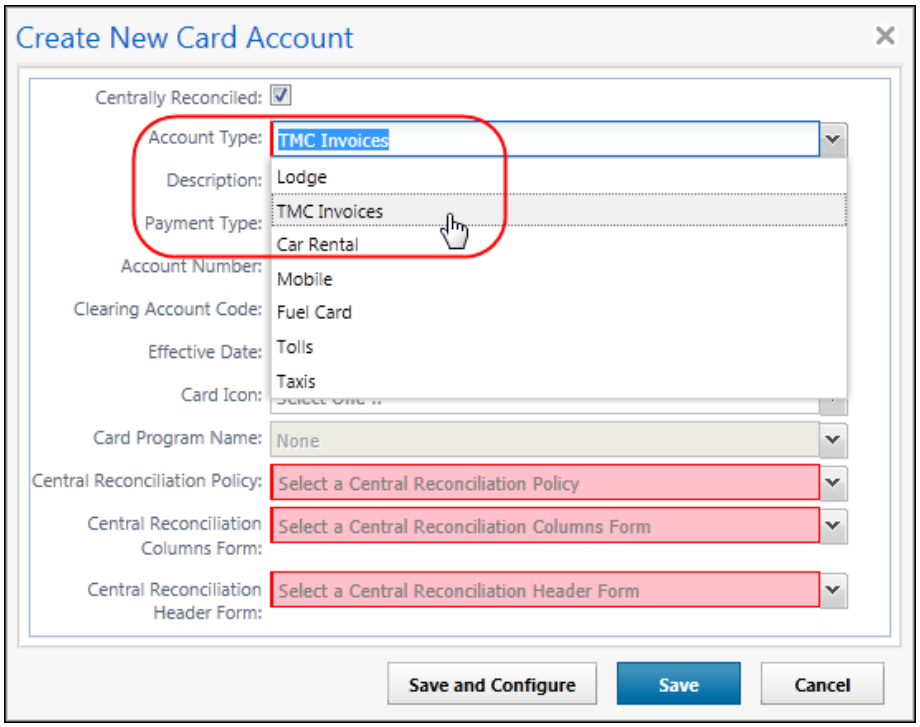
Currently Central Reconciliation works with the Lodge card credit card feeds. With increased demand from markets where this card type is rarely used and travel bookings occur directly with TMCs, a new method to manage spend is required.

To match the spend with TMCs, the capability to manage other types of import sources is included in this service release. Using this feature, TMCs can now send their account feeds directly to Concur using the Concur Enhanced Feed format.

Configuration/Feature Activation

Setup is identical to that performed for Lodge cards. The Card admin will need to ensure their TMC has contacted Concur to obtain the new feed format so that they can write to the Concur Enhanced Feed format with the account data.

To accommodate this change, a new setting, TMC Invoices, is available for selection from **Account Type** when creating a new card account and selecting (enabling) the **Centrally Reconciled** check box.



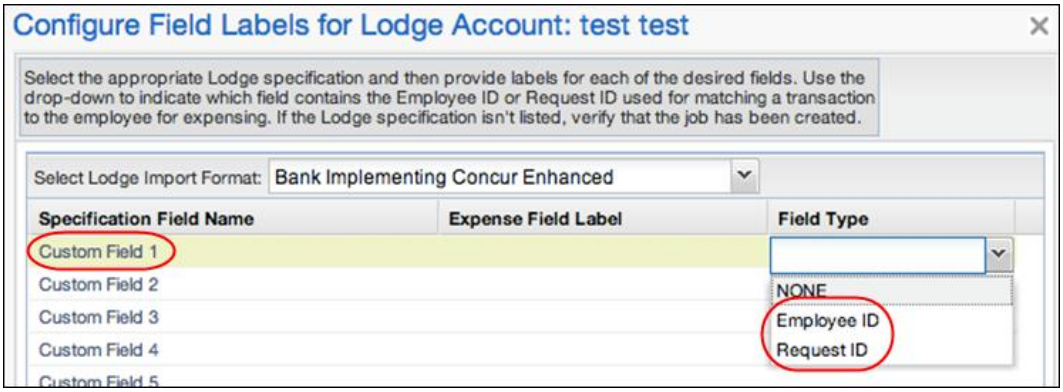
Please notes that other options are available when selecting **Centrally Reconciled**, and may be in place to support a future enhancement:

- **Lodge:** Use whenever setting up the Lodge account type.
- **TMC Invoices:** Use to set up a non-Lodge account type (that is, when configuring a TMC-based account).
- **Car Rental:** Future use – will be enabled in an upcoming service release.
- **Mobile:** Future use – will be enabled in an upcoming service release.
- **Fuel Card:** Future use – will be enabled in an upcoming service release.
- **Tolls:** Future use – will be enabled in an upcoming service release.
- **Taxis:** Future use – will be enabled in an upcoming service release.

ADDITIONAL CONFIGURATION INFORMATION

Please note the following changes when working with this feature:

- **Account Number Change:** The account number length is increased to 50 characters so that an entire account number (often used by TMCs) can be supported – the minimum length remains at 14 characters.
- **Custom Field Configuration:** The TMCs will be required to send the Employee ID or the Request ID values where they will appear in a Custom field of the Card Feed. Configuration by the client is identical to that used for the Lodge Card:



- **Secure File Transfer:** Concur Operations consultants must establish a secure file transfer setup from TCM to Concur similar to that used for Lodge cards
- **Concur Enhanced Feed Compatibility:** All TMCs utilizing this feature must write to the Concur Enhanced Feed, where the type 400 and 401 record sets are available for this purpose. Clients and TMCs may request feed format and samples directly from Concur (refer to the "Card WIKI" for this data).

📖 For more information, refer to *Expense: Central Reconciliation Setup Guide*.

Supported Configurations

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
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What the User Sees

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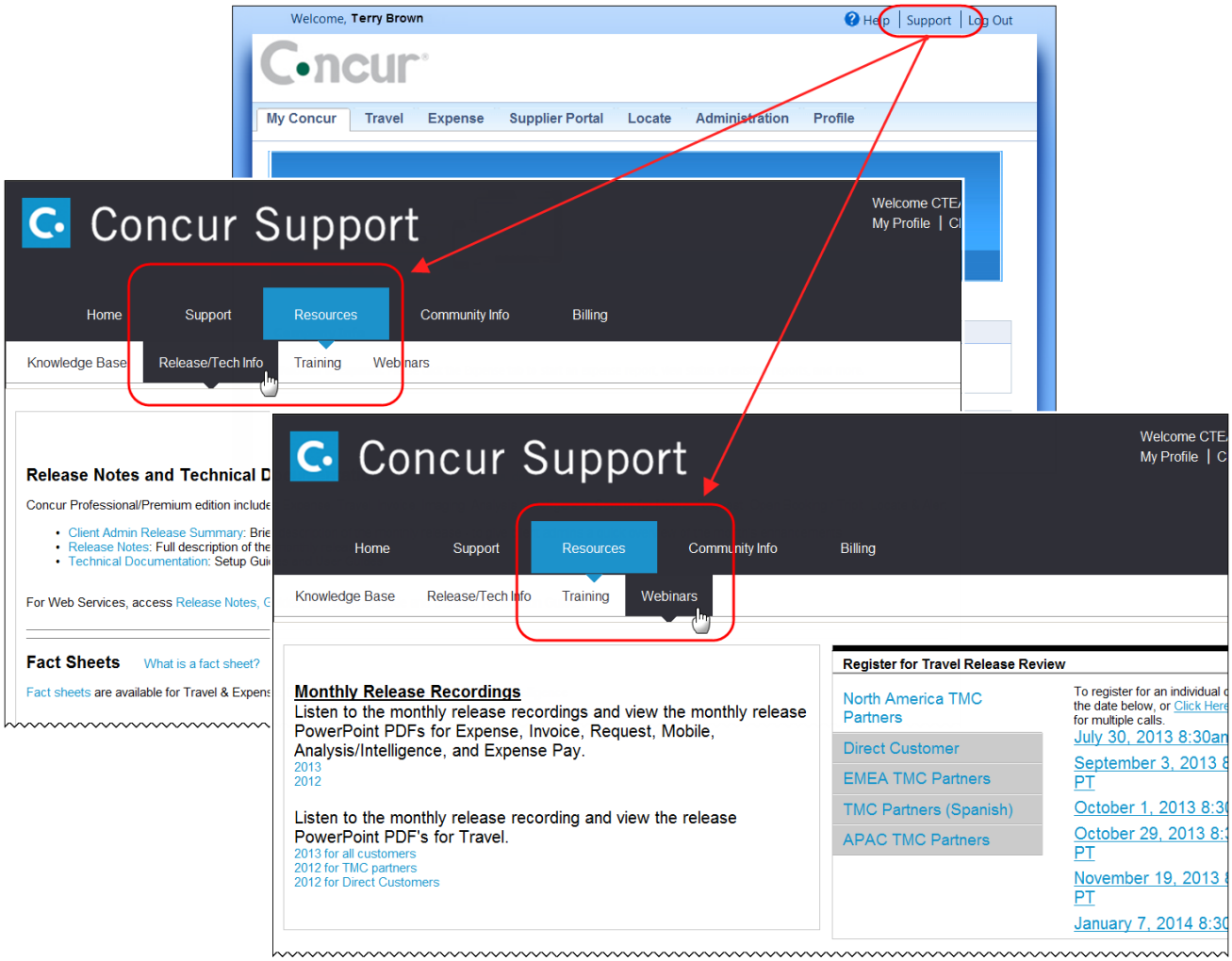

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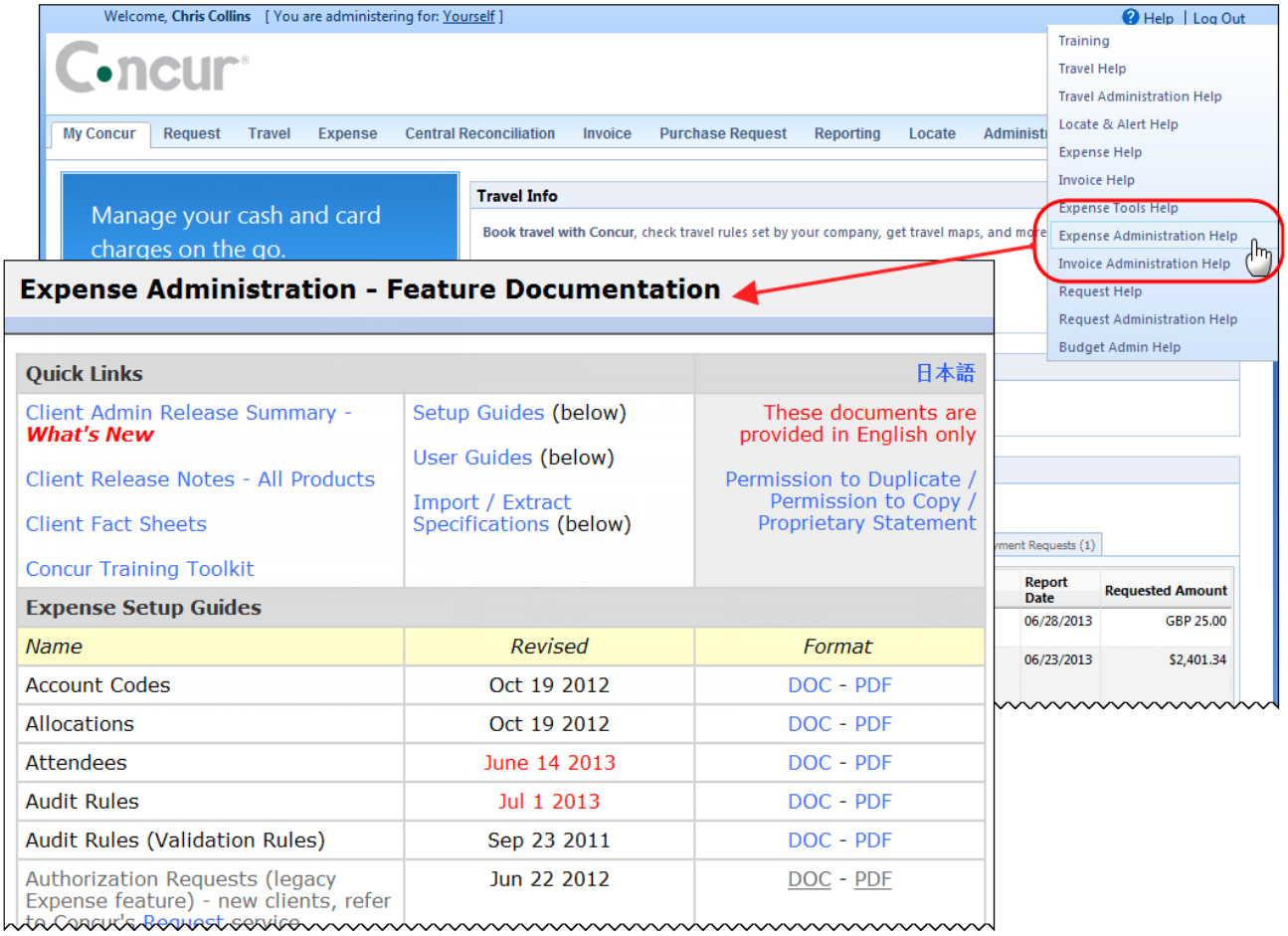
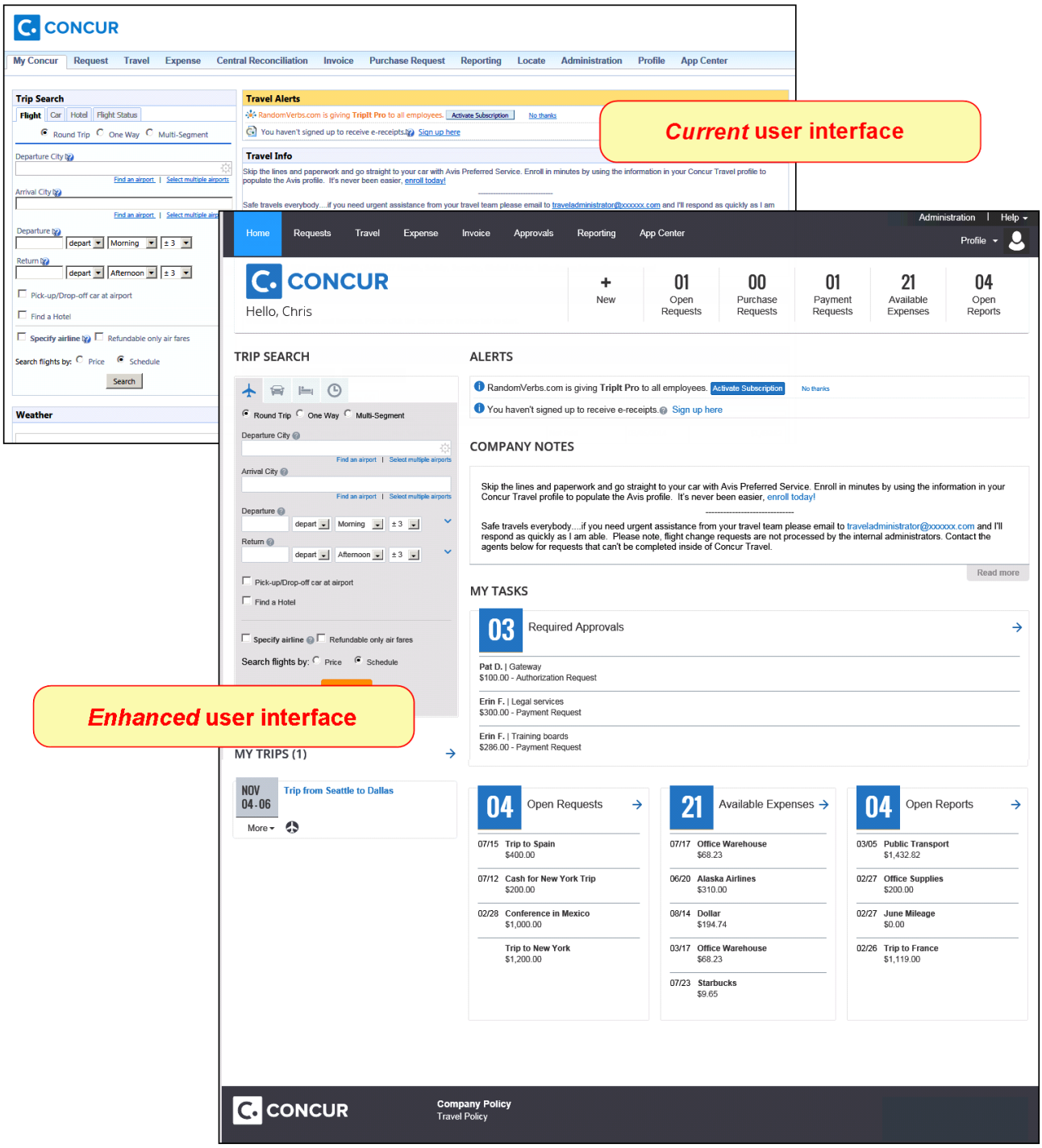


Concur Release Notes **Expense Professional / Premium** Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	**Audience**
October 2014 Initial Post: Friday, October 17, 3:30 PM PT	Client ***FINAL***

Contents

Two User Interfaces – Enhanced UI

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



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

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).

Preview Options

Overview

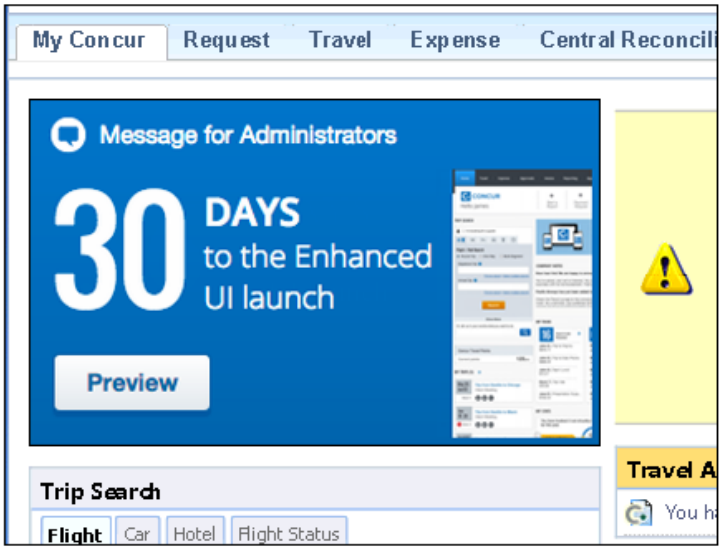
Concur has provided several options for users to become familiar with the enhanced UI and introduce it in the company during the preview period. The enhanced UI may be activated:

- For the individual admin: This provides the administration team time to familiarize themselves with the change and to update any documentation or training materials before their users are exposed to the change.
- For selected users: This allows the company to have selected users get familiar with the enhanced UI before their peers, allowing for admin assistants or super users to help their colleagues during the company rollout.
- For groups/travel classes: This allows deployment of the enhanced UI to any new implementations of divisions or groups immediately and allows the company to gradually roll out the new UI.
- For the entire company: This turns on the enhanced UI for the entire company, so that companies eager to switch may do so on their own timeline in advance of the final cutover in 2015.

These options are available in the **User Experience Settings** page for qualified administrators, and in some cases also from selected administrative pages dealing with user or group management. 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.

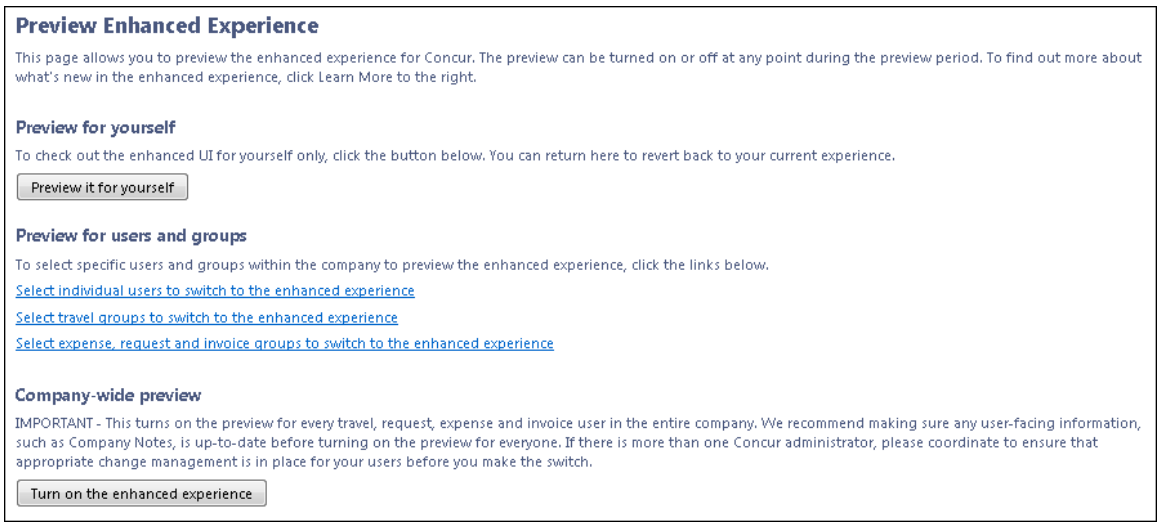
What the Admin Sees

On login to Concur, administrators will see new messaging on the **My Concur** page advising them of the transition process and a countdown to the mandatory cutover date.



By clicking the button in this message, the admin sees the new **User Experience Settings** page, which will display the options that the user's roles and permissions allow. The admin may also access this page via **Administration** > **User Experience Settings**.

NOTE: A user who is assigned to the enhanced UI via any of the available options will see it throughout the application.



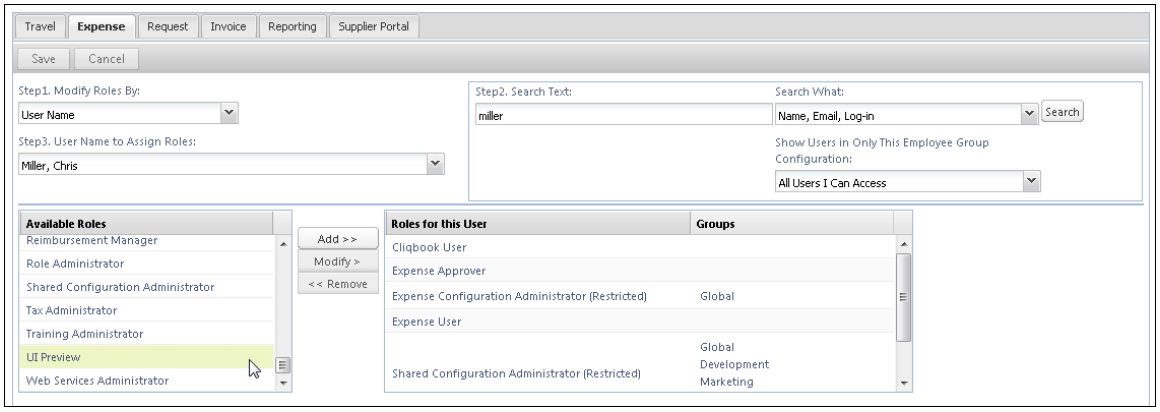
Detailed information about each of these options, and the roles that may use them, is available in the transition guide.

Specific Changes for Expense

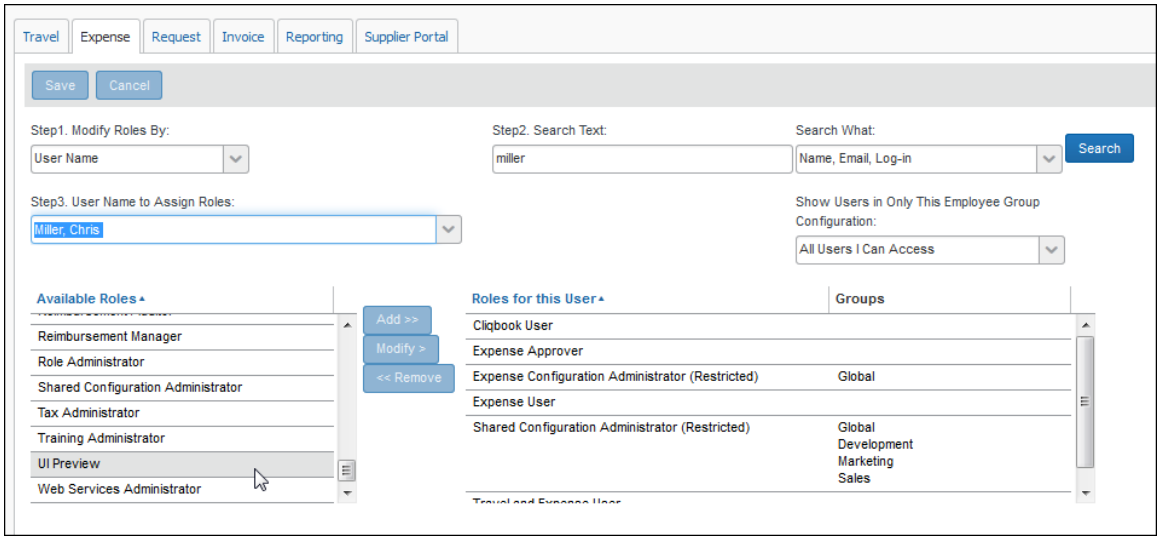
UI Preview Role

The admin sees the new **UI Preview** role in User Permissions.

Current UI:



Enhanced UI:



This role can be assigned to individual users. Once the user is assigned this role, their next login will take them to the enhanced UI.

NOTE: For some clients, the UI Preview user role may appear on the **Travel** tab of **User Permissions** before the October release. Do ***not*** assign this user role until after the October release.

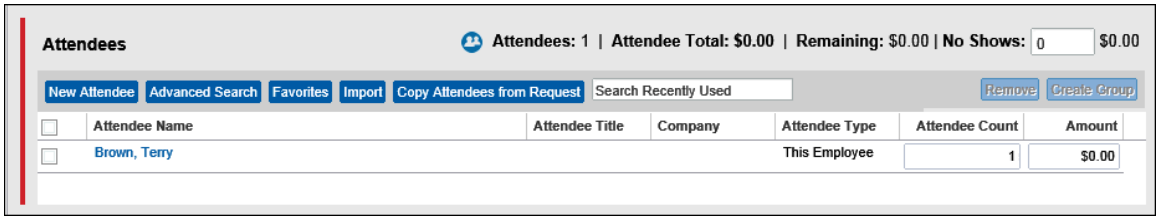
Attendee Section Updates

In the enhanced UI:

- The buttons above the attendee names have been rearranged.
- As the browser size is reduced, the attendee button bar can now collapse from both the right and the left side to compensate.

Current UI:

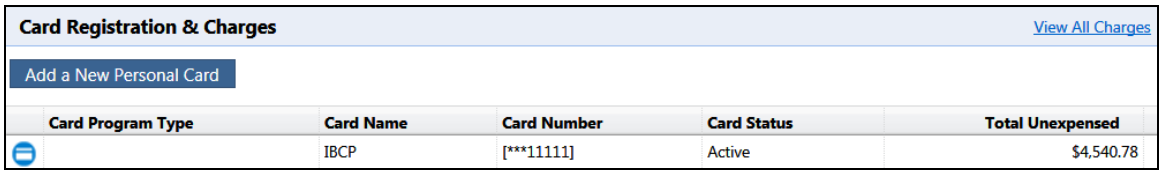
Enhanced UI:



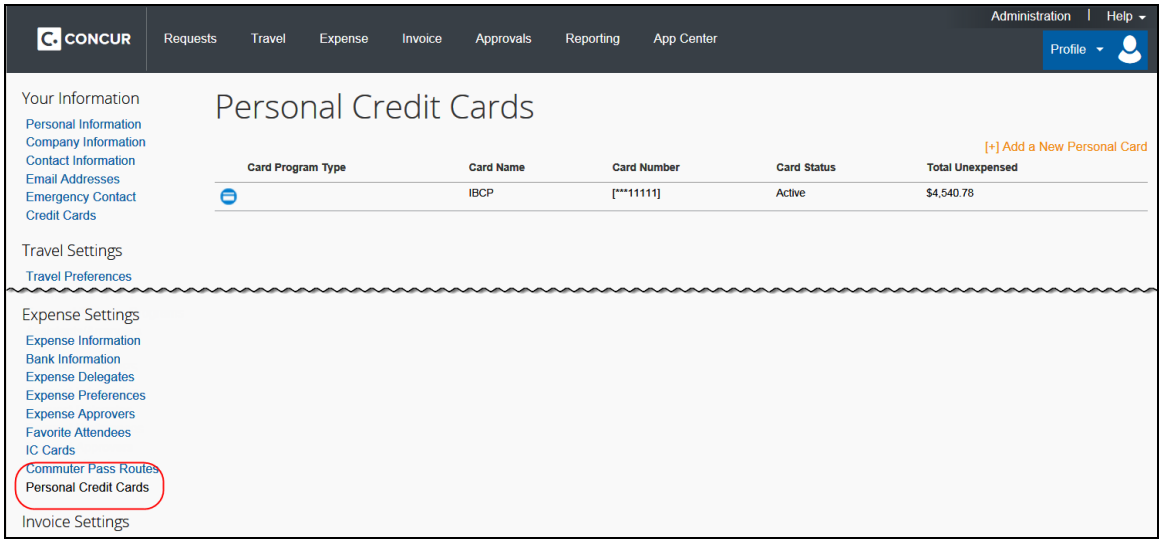
Personal Credit Card in Profile

If the company uses the personal card import to import your personal credit card transactions, note that your card information now appears in Profile instead of on My Concur.

Current UI:



Enhanced UI:



Configuration/Feature Activation

This administrative preview feature is automatically on with the October release; there are no additional configuration or activation steps. It cannot be disabled unless the entire company is moved to the enhanced UI.

Release Notes

Expense

Excel Attendee Import Enhancements

Overview

The spreadsheet attendee import has been enhanced with the following changes:

- Attendees that are missing required fields can now be imported. The attendees must have at least the Last Name and Attendee Type field completed. The user can add all other required fields to the attendee record after import.
- Attendees that are in the user's Favorites are not treated as duplicates, providing that the attendee record appears once, and only once, in the user's favorite attendees.
- Attendees of type SYSEMP (Employee), where the user is not allowed to create a new attendee record, can now be imported and will be matched to one existing employee record.
- Attendee types where the user may not create a new attendee record but may search for attendees from a company-managed list may be included in the import file. The system will attempt to find a match with existing attendees in the system, and will fail the record if no match is found.

NOTE: This will not call any of the external data providers to attempt a match, but will match to attendees that have already been used and are thus available in the Concur system.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows users to import attendees without including all the required information in the spreadsheet, and allows the user to include their own information in the attendee import. Users who can't create new attendees can now include existing attendees in the import file, and the import process will match those attendee records.

Configuration/Feature Activation

The feature is automatically on when the Attendee import from Excel feature is enabled; there are no additional configuration or activation steps.

Credit Cards: Copy Down Passenger Name Data to Report Entry

Overview

For this release, if the **Passenger Name** data is included in the American Express APA eData feed, it is mapped to the **Description 2** field at the transaction level. Doing this means the field can be copied down into a report entry, and so configured to appear as the value for **Business Purpose** at this level.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows better tracking of this information and allows it to be displayed alongside the airline charges spend data.

Configuration/Feature Activation

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

Training Admin: New Training Materials (English)

Overview

With the October release, the English training content that is available through the Training Admin tool will be replaced. New content that matches the Concur User Evolution Experience will replace the existing training content. If you have activated training for your company from the options provided in the Training Administrator module, the content on that toolkit will be automatically updated to the new demos and guides. Clients cannot opt out of this process. We encourage you to review and update your custom training toolkit after the October release to add and update items based on the new content.

Clients with a custom training URL (Configured on the Alternate URL tab in Training Administration) are not affected by this change.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides helpful training content to introduce users to the enhanced user interface.

Configuration/Feature Activation

The feature is automatically on for clients using English; there are no additional configuration or activation steps. Training items in other languages will not be altered, and will receive updates in subsequent releases.

If the administrator does not want their users viewing the updated training modules, they have the following options:

- **Deactivate the enhanced training modules, and create custom training module links that point to the previous content.**
- **Create a custom training site that includes links to the old training modules, then direct the Training help link there.** Over the course of the next several months, all of the Concur-provided resources will be updated to the enhanced UI across all languages. A client that wishes to retain the current UI and does not wish to perform the steps listed above each month as resources are updated may choose to create a custom training page to use until they are ready to move their users to the enhanced UI.
  To replace the entire site, first build the page that will be used for the new training site in your company's intranet.

The URLs to the training modules for the current UI can be found on the Training Toolkit page:

http://www.concurtraining.com/customers/concur/trainingtoolkit/onetouch.asp

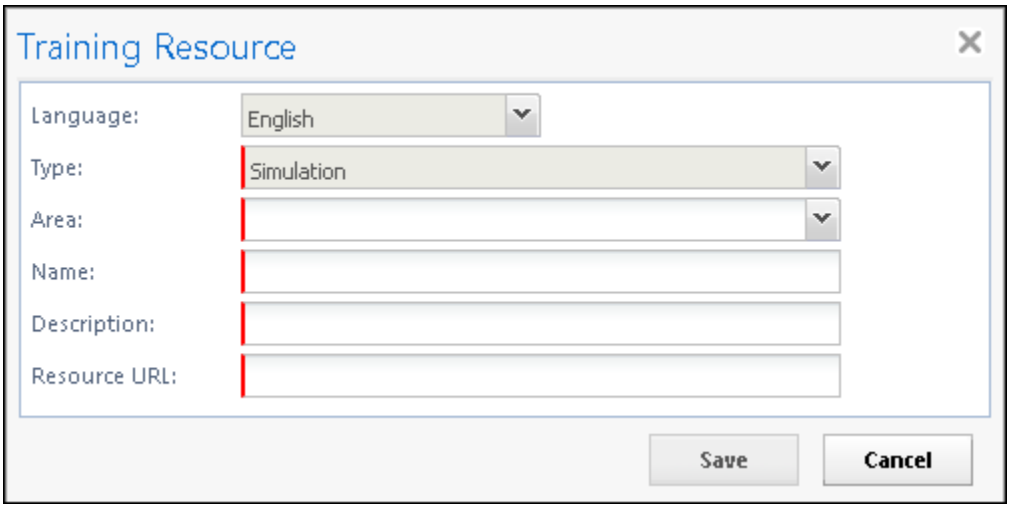
The following processes explain how to complete these actions.

Deactivating the enhanced UI training:

1. Click **Administration** > **Expense Admin** > **Training Administration**.
2. On the **Simulation Resources** page, select **English**.
3. Clear (disable) the **Active** check box for the desired simulations.

Adding a link to a previous training module:

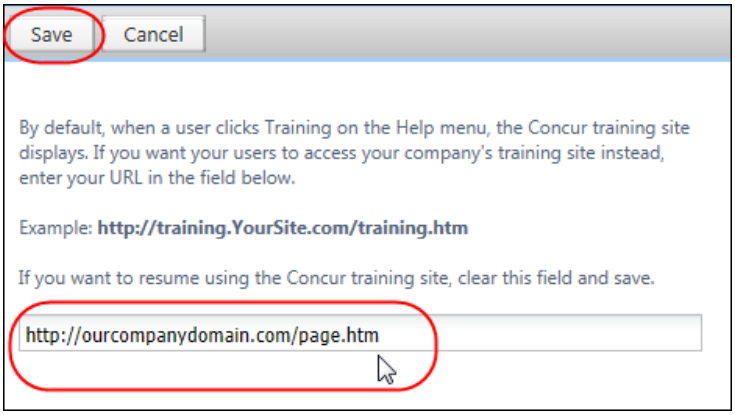
1. Click **Administration** > **Expense Admin** > **Training Administration**.
2. On the **Simulation Resources** page, select **English**.
3. Click **New**.
4. Enter the details of the training resource, including the URL.



5. Click **Save**.

Directing users to a different training site:

1. Click **Administration** > **Expense Admin** > **Training Administration**.
2. In **Training Configuration**, click the **Alternate URL** tab.
3. Using standard URL syntax (Expense will prompt if errors), type the address you would like the Training link to open when clicked. This may be the Concur current UI training toolkit, or a custom training site of your own.



4. Click **Save**.

Card Programs: Fleet/Fuel Card Processing Now Available

Overview

Concur is pleased to announce that – for clients who use the WEX Fleet Card (formerly the Wright Express Universal Fleet Card) – Concur now provides processing for fleet/fuel card transactions.

There are three types of card programs:

- **Driver card:** Card assigned to a specific driver, to be used for all fleet/fuel transactions incurred by that driver in any vehicle

  The card accounts are assigned directly to the driver, who can see and manage the charges just like any other Corporate or Purchasing Card.
- **Vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver

  For these accounts, the driver must enter his/her driver ID at the pump or point-of-sale. Concur will import the card charges and – using the driver ID – route them to the appropriate Concur user (driver).
- **Managed vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver but all transactions are managed by a single client-defined driver/employee.

The card accounts are assigned directly to the driver/employee, who can see and manage the charges just like any other Corporate or Purchasing Card.

Note the following:

- The fleet/fuel transactions appear to the user in Expense just like other card charges.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides support for a new type of card program.

Configuration/Feature Activation

This is a no-fee service available only to clients who use WEX Fleet Card (formerly the Wright Express Universal Fleet Card). Additional fleet cards will be available in the future.

Always Update Existing Summary Record with Addenda Data

Overview

Increasingly, financial institutions are providing more and updated addenda data, allowing Expense to now support continuous update of an existing summary record whenever additional addenda data is imported into Expense.

To take advantage of this, Expense will now *always* update a summary record for an existing financial transaction by recreating the record when new data arrives based on new settings. Additionally, a company can request that this behavior be disabed if the transaction is already linked to an expense report, thereby preventing the update if the company prefers.

NOTE: This feature applies to the VISA VCF v4.0 and MasterCard CDF v3.0 card feed import, and will support additional card feeds in the future.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement ensures the summary record created by the financial transaction and any related addenda data is accurate with the latest information.

How It Works

This feature uses two new settings, one at the site settings level, and one at the entity level. The settings are designed to first enable this behavior, and then to allow or preventthis behavior if the transaction is associated with a report.

The addenda data associated with a financial transaction is updated continuously as new addenda data is imported into the system. When this functionality is enabled, addenda data will be updated as it is received in the card feed. Clients have the

option to disable the update if the card transaction has already been used in a report.

Configuration / Feature Activation

The client will need to contact Concur and request this feature change.

Allow Users to Combine Expenses

Overview

Upon occasion, two expenses may be created for the same expense. A new optional feature allows the user to combine two expenses on the report to consolidate the data into a single expense.

The user will be able to combine reasonable types of expenses, but not expenses with like types of data.

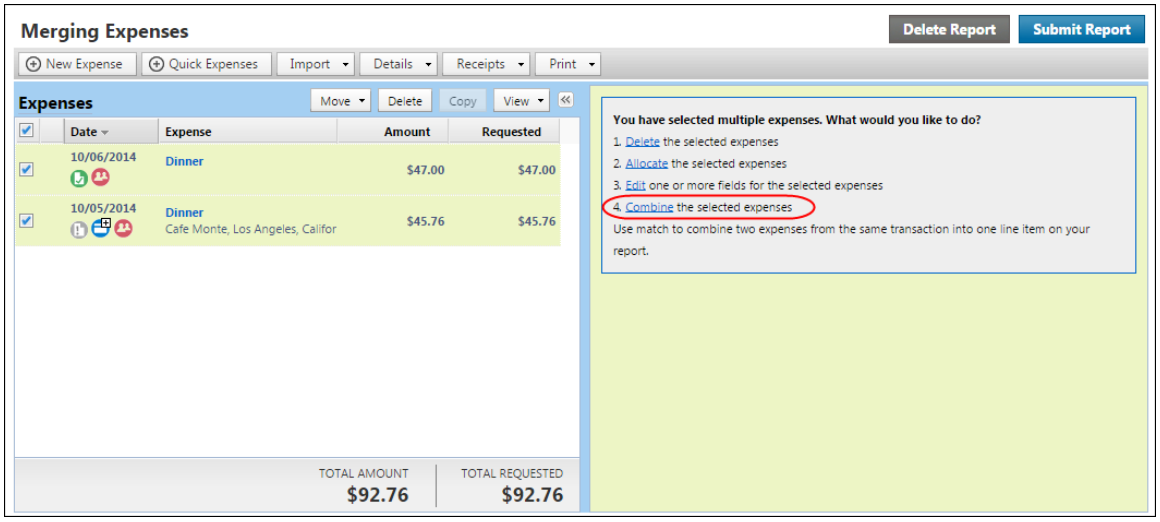
Expense has…	No extra data	Card transaction	E-receipt	Receipt Image	Travel booking segment
No extra data	X	X	X	X	X
Card transaction	X	X	✓	✓	✓
E-receipt	X	✓	X	✓	X
Receipt Image	X	✓	✓	X	✓
Travel booking segment	X	✓	X	✓	X

These types of expenses cannot ever be combined:

- Fixed allowances/daily travel allowance expenses
- Mileage expenses

What the User Sees

When this feature is enabled, the user can select two expenses and see the **Combine** option:



After the user clicks **Combine**, the two expenses are merged into a single entry.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement lets the user easily combine two expenses if an extra entry is accidentally created for the same expense.

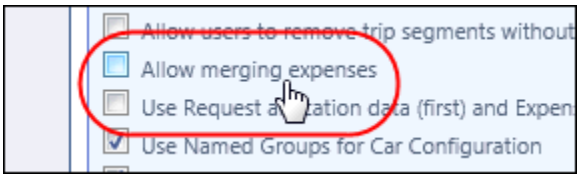
Configuration/Feature Activation

A new site setting, **Allow Merging Expenses**, is now available in the Expense Site Settings tool. When selected (enabled), the setting will present the Combine option to the user within an expense report.

The feature is disabled by default and there are no changes to Expense.

▸ ***To enable the Allow Merging Expenses feature:***

1. Click **Administration** > **Expense Administration** > **Site Settings**.
2. In Site Settings, scroll to **Allow merging expenses**.



3. Select (enable) the **Allow merging expenses** check box.
4. Click **Save**.

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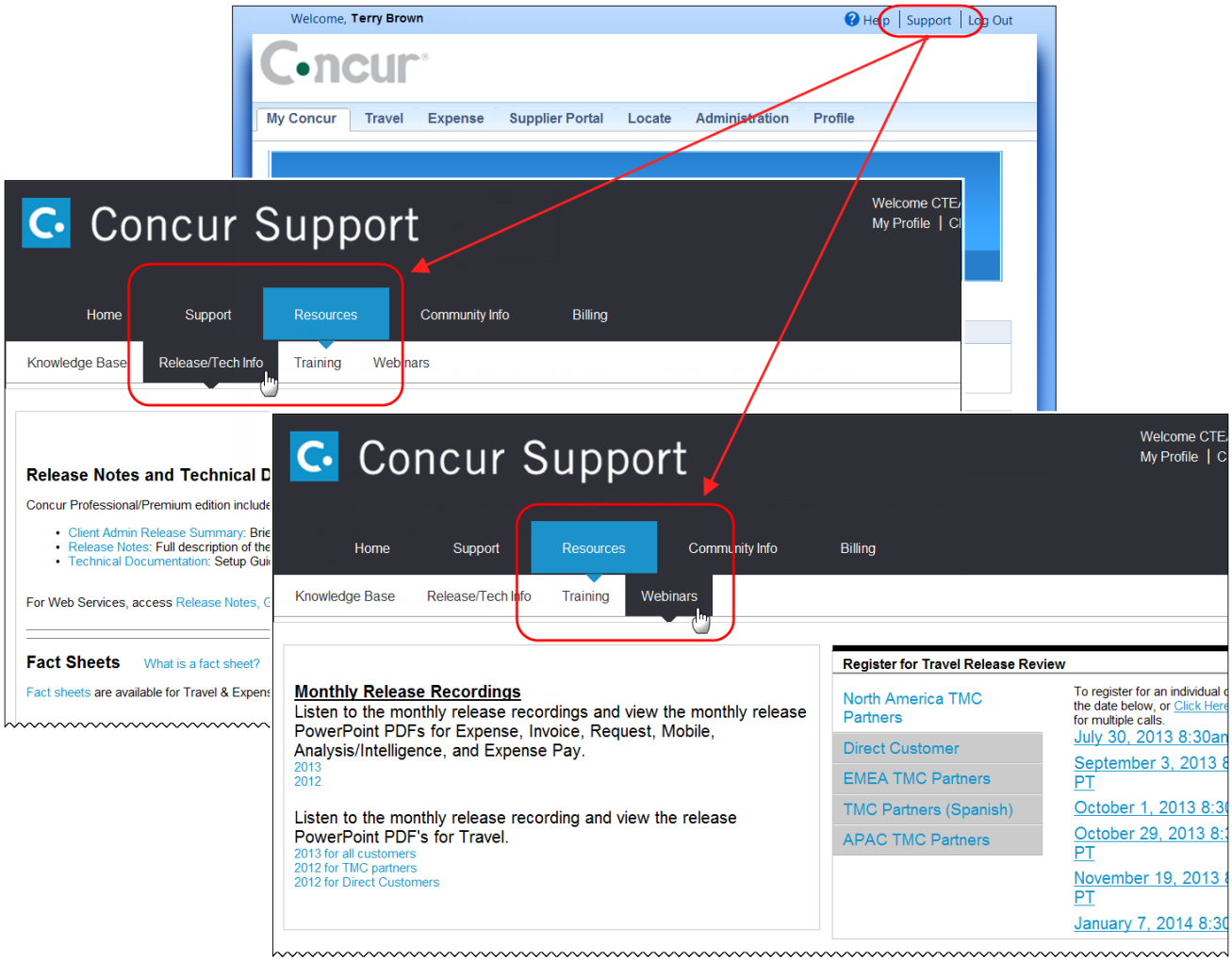

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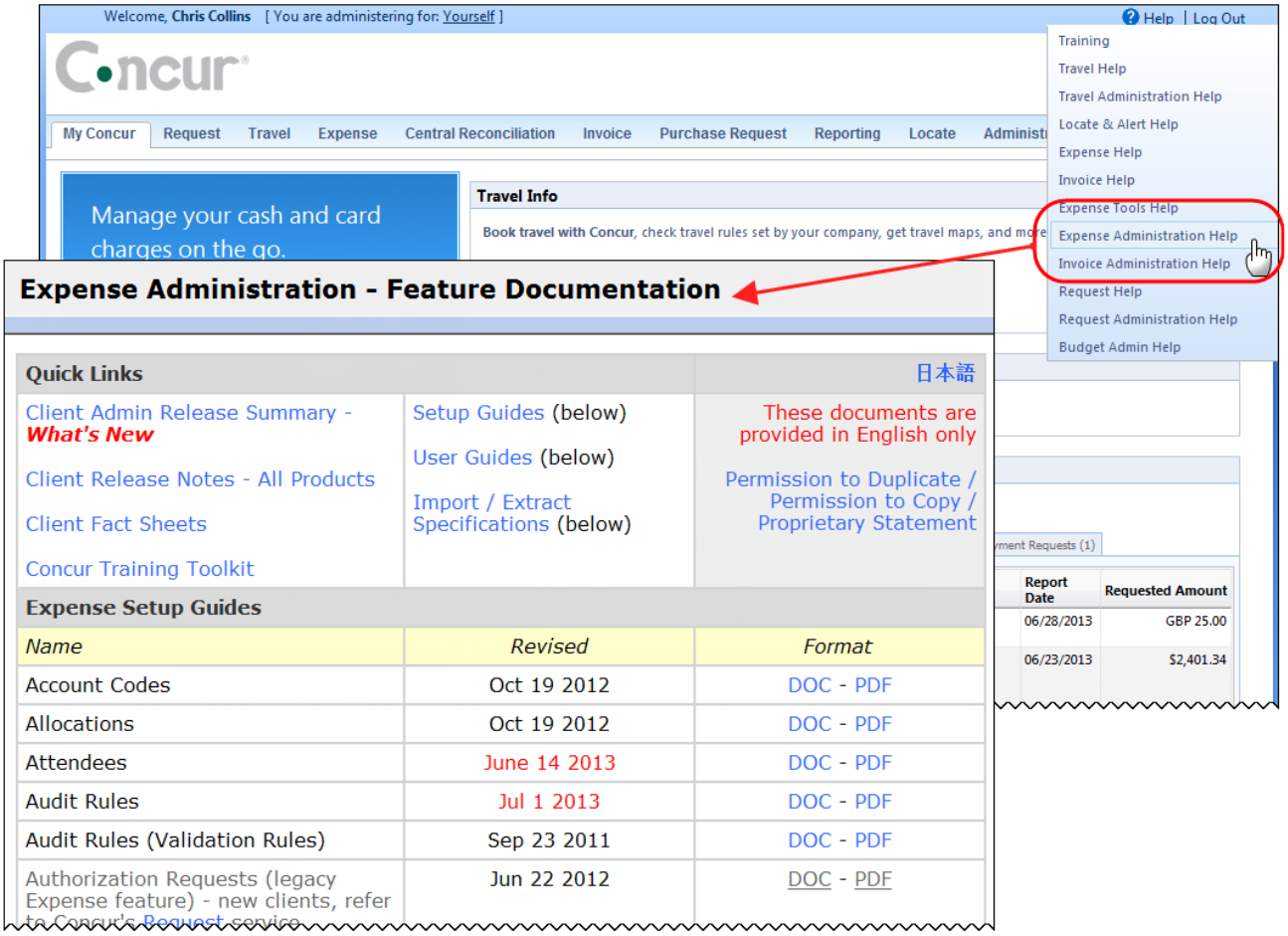

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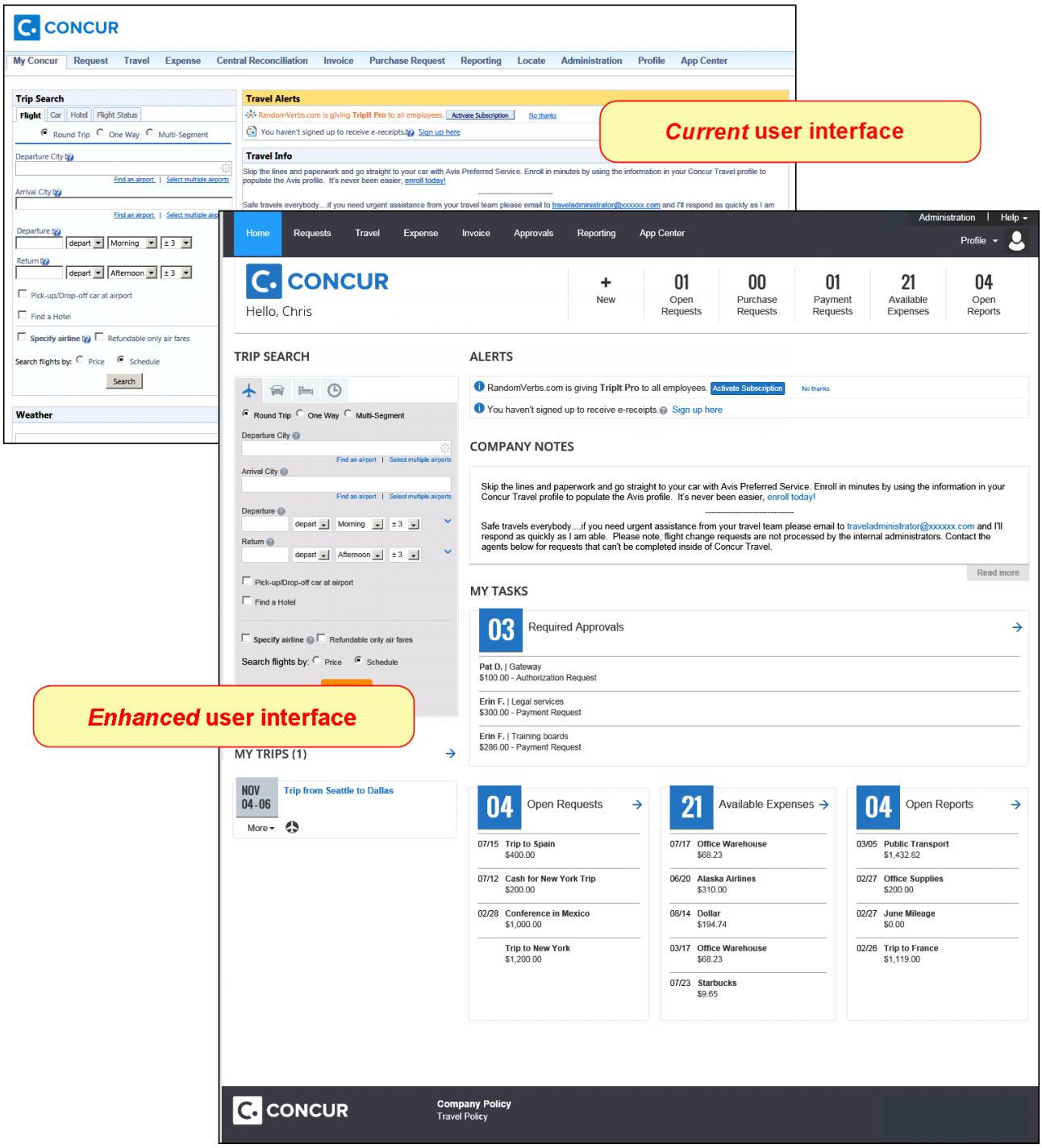


As described previously in the monthly release notes, the enhanced UI brings some long-awaited usability enhancements – some are significant (perhaps involving navigation changes) while others are minor (involving only look-and-feel).

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

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

Expense

Coming Soon: Extract of UUID Data to the Client Financial System

Currently the client can view UUID data by hovering over any uploaded CFDi receipt type (XML) that includes this information. Expense stores this information and, in a future release, will allow extract of this data using a new Standard Accounting Extract (SAE), version 3. The UUID value is entered in the new **Report Entry Xml Receipt UUID** field when updating the client's financial system using the new SAE.

PLANNING FOR EXTRACT OF THE UUID DATA

Note that this change will require close coordination with your IT financial systems support personnel. Today, the client can work with Concur Support to add this field to their existing extract in a field position that they are not currently using.

NOTE: Clients who do not require UUID data as with the new Mexican regulations for January 2015 need take no action, as no changes will occur on release.

BUSINESS PURPOSE / CLIENT BENEFITS

This enhancement satisfies requirements of the Mexican government as passed in July 2014 that the company be able to provide the relevant UUID from the XML file as part of the data that is reportable from their financial systems.

Configuration/Feature Activation

Please work with Concur Support and your own company's IT department to ensure any changes are communicated to the team responsible for importing this data into your financial systems.

You may:

- Elect *today* to add the **Report Entry Xml Receipt UUID** field to your existing accounting extract in an unused position.
- Before the end of 2014, take advantage of the new version 3 SAE's multiple new fields (including the UUID field) to add flexibility to your extract process. This will involve a larger project with your IT team, but may yield benefits going forward for your company.

More information will be available in upcoming release notes.

Attendees: Obtain from a Meeting Invitation

Overview

Concur has created a new optional feature that streamlines attendee input. A user with a verified email address can forward an Outlook meeting invitation email (as .ics file) to receipts@concur.com. Concur will create an expense with an attendee list based on the meeting participants, which appears in **Available Expenses**. The user can then associate the expense to an expense report and enter additional information about the meeting.

BUSINESS PURPOSE / CLIENT BENEFITS

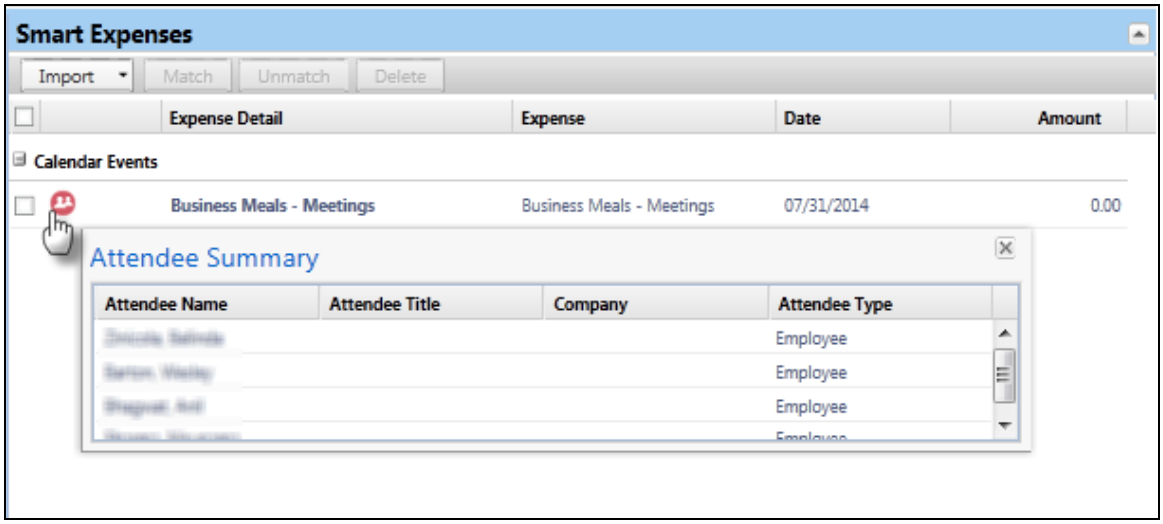
This enhancement streamlines the expense process for users – so they do not have to recreate a list of attendees.

What the User Sees

The user creates a meeting in Outlook as usual. The user forwards the meeting (as a .ics file) to receipts@concur.com, from a verified email address.

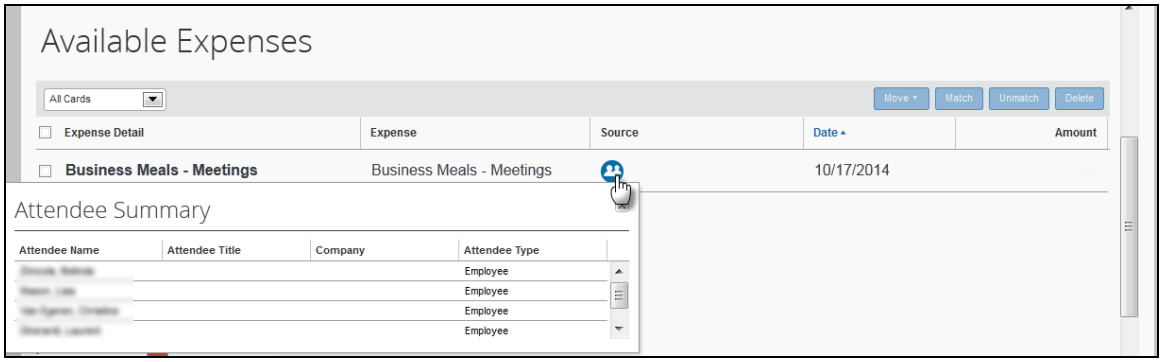
Concur creates the attendee list, which appears in the **Smart Expenses** section under the new **Calendar Events** section in the current UI and under the **Available Expenses** section in the enhanced UI.

Current UI:



Enhanced UI:

NOTE: This appears in the Available Expenses section, but is not counted as an expense in the number of available expenses listed on the home page.



The user attaches the attendee list to an existing expense or uses it to create a new expense. Once the attendees are attached to an expense, the user can add, remove, and edit the attendees as usual.

Configuration / Feature Activation

This feature is activated using the **Settings** tab of the **Attendee** page of Expense Administrator. This feature is off by default.

To enable the feature:

1. In the *current* UI, click **Administration** > **Expense Admin** > **Attendees** > **Settings**.
   - or -
   In the *enhanced* UI, click **Administration** > **Expense** > **Attendees** > **Settings**.

2. Select (enable) the **Allow users to add attendees from meetings via email to Concur (*.ics files)** setting.

3. Click **Save**.

Attendees: Attendees from "My Team"

Overview

Concur has added a new optional feature that allows users to easily find employee attendees that they work closely with. The new **My Team** tab in the **Search Attendees** window contains the names of the user's team members, based on the default approver assignments in Profile.

This tab displays the group of employees that are related to the current user in the following ways:

- The employees share the direct approver with the user.
- The employees report directly to the user.

Concur uses the configured default approver in the employee profile to determine the team structure. Delegates will see the My Team employees for the users that they are delegating for, not their own team.

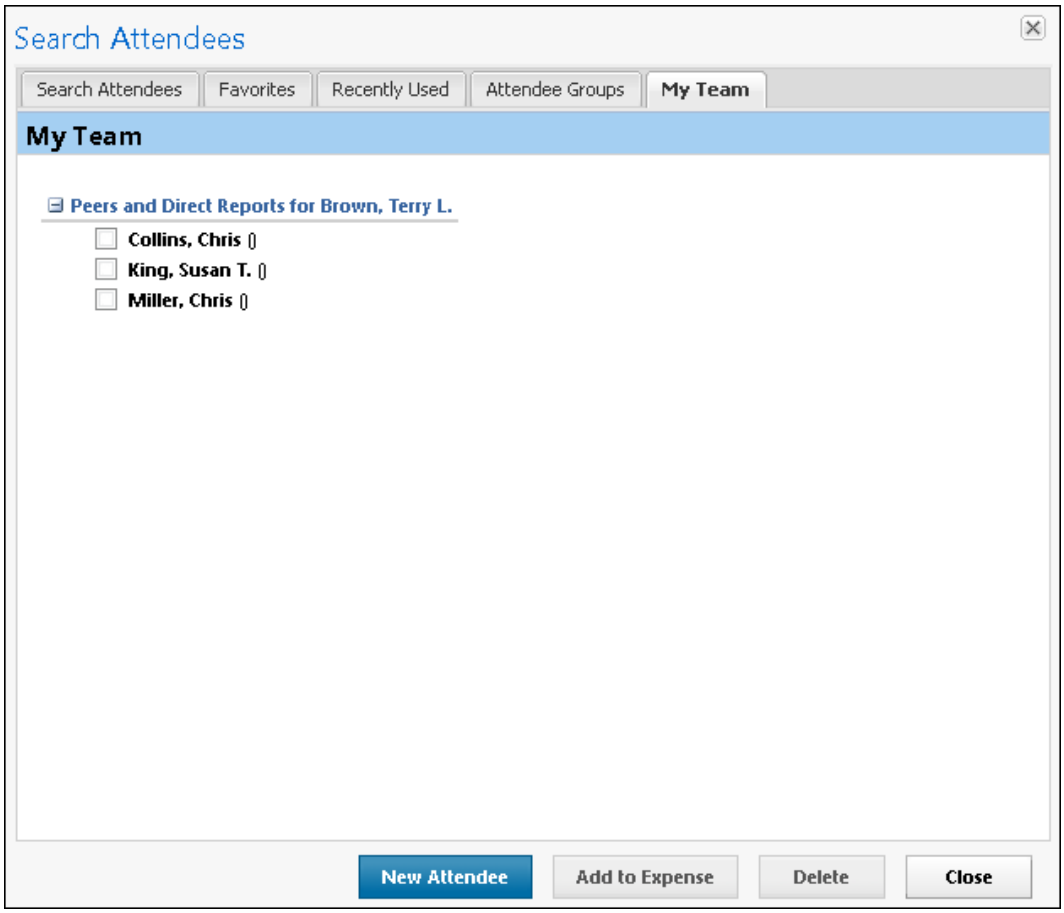
BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement makes other employees easier to locate for team-based activities.

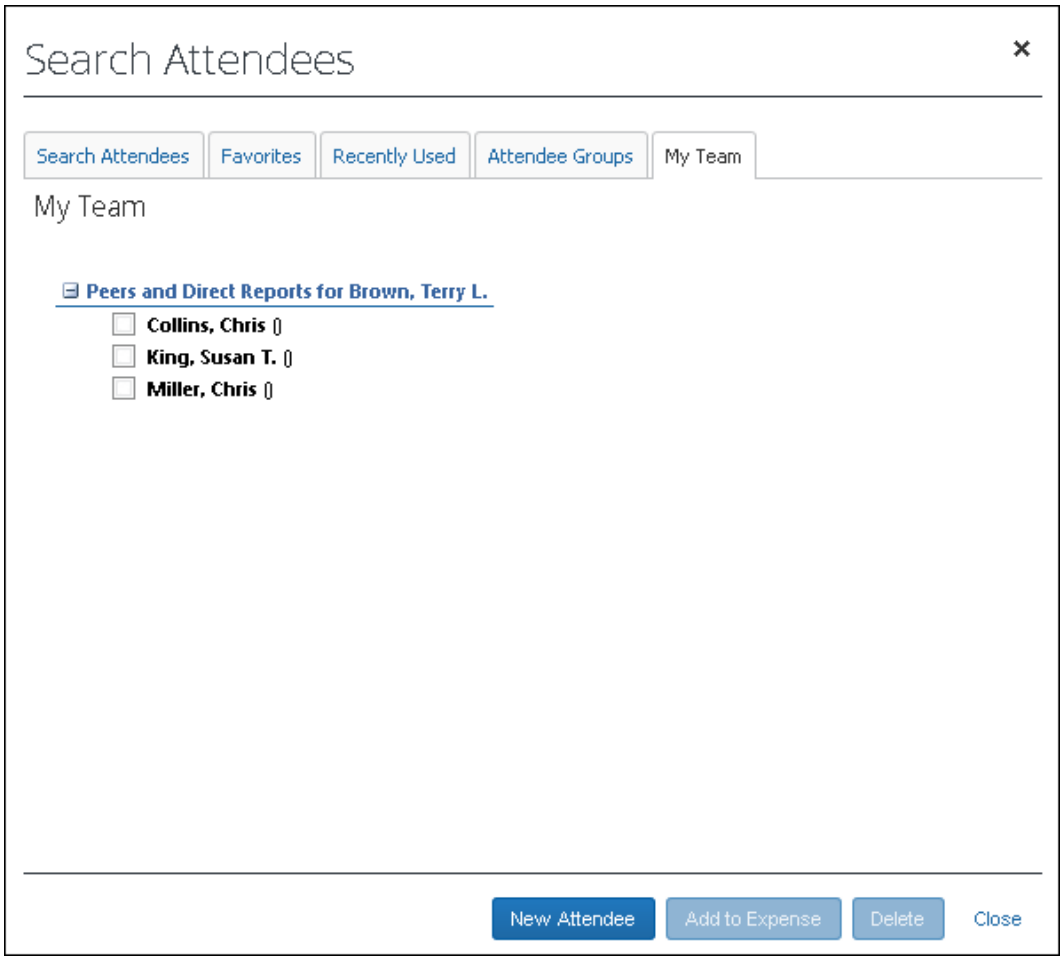
What the User Sees

In the **Attendee** section of an expense entry, the user clicks **Search**. In the **Search Attendees** window, the user clicks the **My Team** tab.

Current UI:



Enhanced UI:



The user can select attendees from this list – just like any other attendee favorites list.

Configuration / Feature Activation

NOTE: This feature requires that the auto-creation of users as attendees be active and that employee attendees are a shared list under the SYSEMP attendee type.

NOTE: This feature may be confusing to users if your default Expense approver assignments are not aligned with your team structure.

This feature is activated using the **Settings** tab of the **Attendee** page of Expense Administrator. This feature is off by default.

To enable the feature:

1. In the *current* UI, click **Administration** > **Expense Admin** > **Attendees** > **Settings**.

- or -
In the *enhanced* UI, click **Administration** > **Expense** > **Attendees** > **Settings**.

2. Select (enable) the **Display My Team in advanced search options** setting.

3. Click **Save**.

Travel Allowance: USGSA Rule Change

Overview

New US rules issued Oct 1, 2014 from JTR incorporate some extended trip reductions that are effective commencing on Nov 1, 2014 for trips starting at that date or existing trips that are newly extended after that date.

- Trips that are over 30 days should have the meals allowance for days 31-180 (full day allowance) reduced to 75%
- Trips that are over 180 days should have the meals allowance for days 181 and greater reduced to 55%

Concur has updated the USGSA rules in Expense to include this update.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement supports new government regulations.

Configuration/Feature Activation

This feature must be enabled within the travel allowance configuration. The extended trip handling is an optional adjustment. It is activated by setting values for the system calculation properties used for this action.

- Extended trip boundaries – a company may elect to use one or two boundaries for the extended trip reduction. If a single boundary is desired, it should be set using extended_trip_days.

- If a company uses both company and government rates, the reduction factor may be set differently for each type of rate. For example, if the company wants to reimburse the traveler 100% of the rate but track the amount over the government limits, they would set the government factors to the government reduction (75% and 55%) and set the company factors to 100%.

📖 For more information, refer to the *Travel Allowance Configuration Guide – US/GSA*.

Rating Survey Simplified and Less Frequent

Overview

Concur announced the end-user survey with the November 2011 release. The survey appears after a user submits an expense report and collects feedback from your users. With this release, have two changes to announce:

- We are reducing the number of questions from two to one.
- We are reducing the number of times the survey will appear to the user/delegate from every report to once within a 30-day period.

NOTE: These changes apply to the end-user survey in Travel as well.

CUSTOMER BENEFIT

These changes enhance the user survey to be as useful and unobtrusive as possible. This change will improve the efficiency of your power users who are in the tool every day, while maintaining the value of the survey response data.

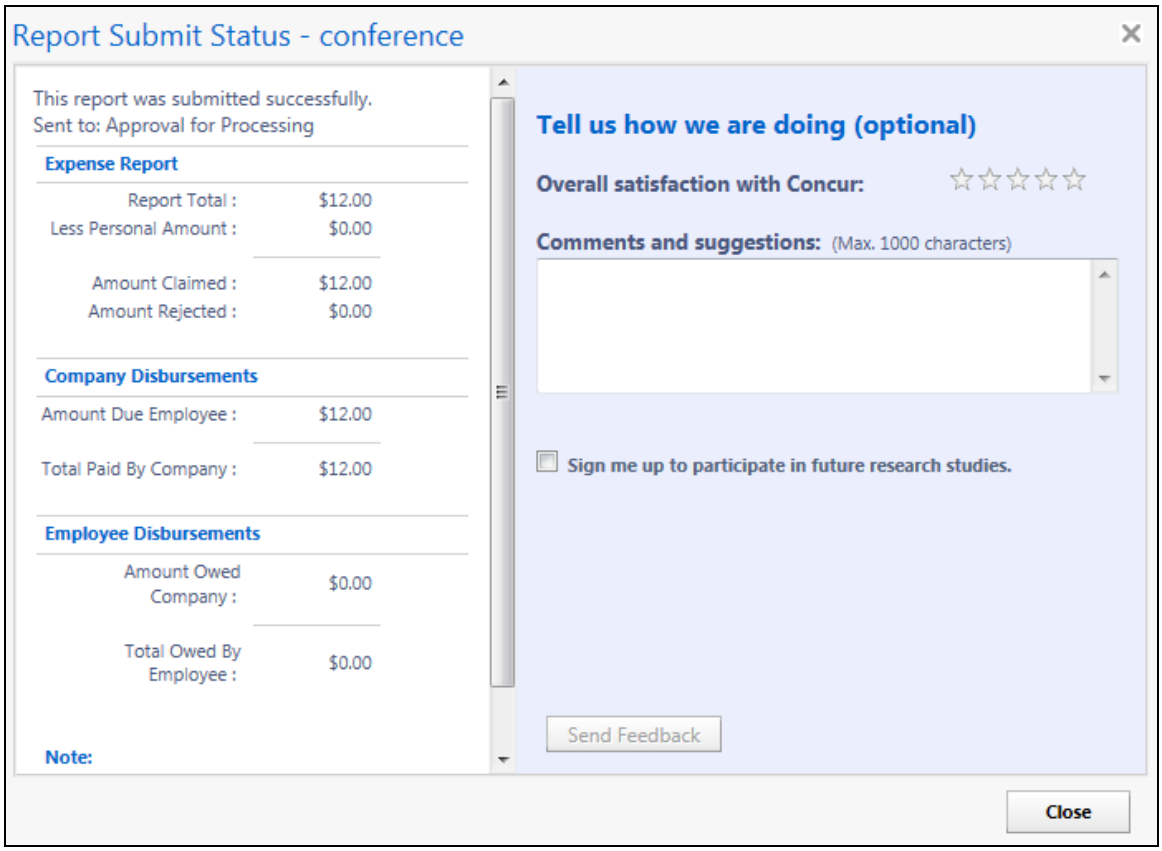
TYPICAL USE CASE

A delegate manages expense reports on behalf of ten users and is in Concur Expense multiple times a day. He/She will now see the end-user survey only once within a 30-day period instead of every time he/she is using Concur.

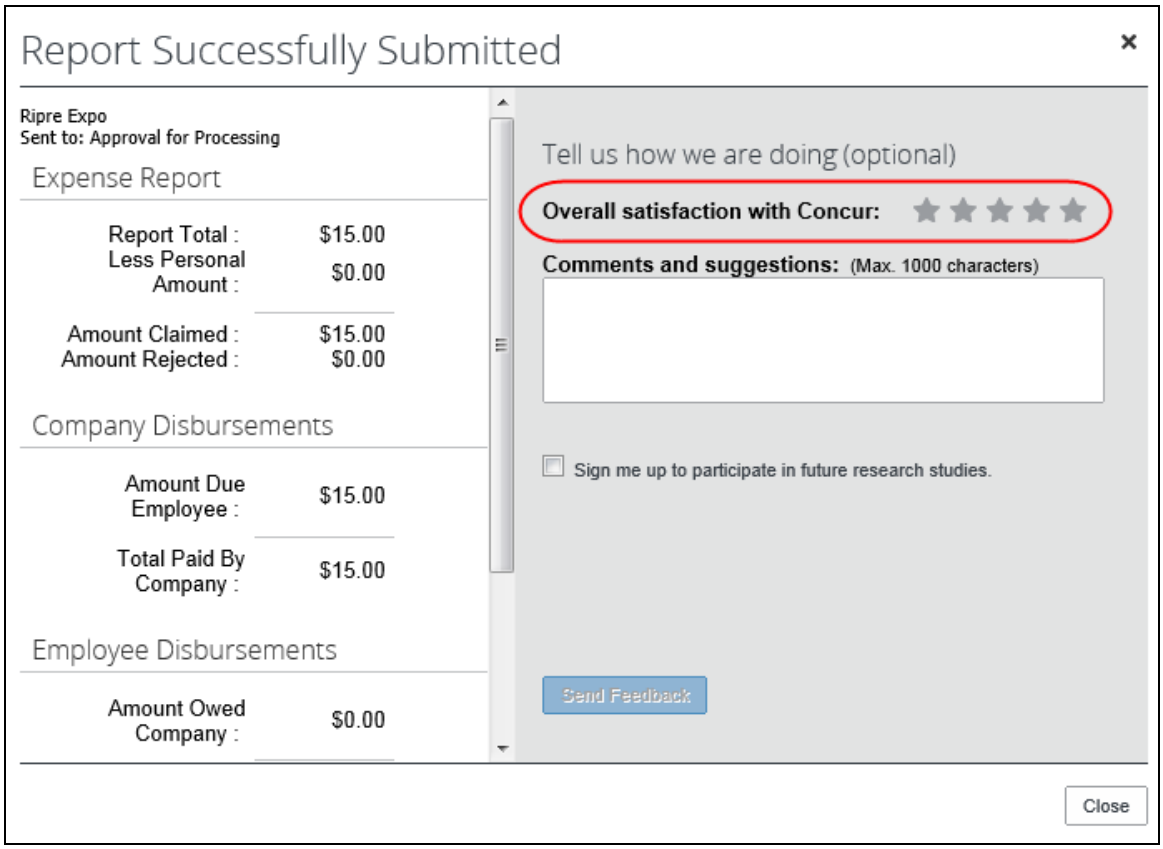
What the User Sees

After the user submits a report, the updated **Report Submit Status** window displays. They can choose whether to populate and submit the survey; it is not required.

CURRENT UI


Report Submit Status - conference
This report was submitted successfully.
Sent to: Approval for Processing
Expense Report
Report Total : $12.00
Less Personal Amount : $0.00
Amount Claimed : $12.00
Amount Rejected : $0.00
Company Disbursements
Amount Due Employee : $12.00
Total Paid By Company : $12.00
Employee Disbursements
Amount Owed Company : $0.00
Total Owed By Employee : $0.00
Note:
Tell us how we are doing (optional)
Overall satisfaction with Concur:
Comments and suggestions: (Max. 1000 characters)
Sign me up to participate in future research studies.
Send Feedback
Close

ENHANCED UI



Configuration/Feature Activation

The updated survey window automatically appears under the same circumstances as before but with less frequency; there are no additional configuration or activation steps.

Credit Cards: Enhancements for This Release

The following features are included in this release.

Use Variables to Customize the Travel Transaction Detail Copy-Down Behavior

With this release, new variables can now be used with a CREDIT CARD site setting in order to customize the copy-down behavior of a Travel detail transaction to a report entry.

BUSINESS PURPOSE / CLIENT BENEFITS

This enhancement supports configuration of the Travel transaction details to accommodate the client's preferred copy-down action to the report entry.

HOW IT WORKS

Currently, the copy-down action occurs based on the first Travel leg detail created by the transaction. Now, one of eight variables can be applied to a site setting, allowing customized factoring based on the first or last chronological leg of the Travel transaction. That is, based on the transaction's first or last leg, and the arrival and departure dates as well.

CONFIGURATION / FEATURE ACTIVATION

The client should contact Concur Support or their Expense representative to determine the variable to use at their company.

Enhancements to Handling of the JCB Billing and Posted Dates

With this release, the Billing Date data included in the JCB card feed is now set to the Sales Closing Data, and the Posted Date is now mapped to the Header Processing Date for both Domestic and Overseas transaction types. This change will provide more accurate information to the Japan-based user working with this data in an expense report.

BUSINESS PURPOSE / CLIENT BENEFITS

This enhancement makes it easier to work with data in the JCB card feed when processed and displayed for the user in the expense report

HOW IT WORKS

This enhancement works by adding the Billing Date data for both overseas and domestic transactions, and setting the Posting Date data to the processing Date.

CONFIGURATION / FEATURE ACTIVATION

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

Enhancements to the JCB Card Import for Overseas Transactions

With this release, the JCB Card import will include all relevant information required to create a card transaction based on overseas use but resolved within the Japan market. This means the feed that includes overseas card usage will include all of this information within a single transaction, and resolve the current behavior where two records, one in Yen, one in the original purchased currency, must be selected by the Japanese user.

BUSINESS PURPOSE / CLIENT BENEFITS

This enhancement consolidates imported overseas card use for the Japan market within a single transaction in the JCB feed, and reduces confusion when selecting the correct expense for the expense report.

How It Works

The card provider has removed the Type 3 record used for foreign transactions, and substituted the Type 2 additional information record when related to an Overseas transaction. This means the Type 2 record is now used for both Domestic and Domestic and Overseas data. A flag setting is used to distinguish Domestic & Overseas transactions, and now if the flag indicates a Domestic and Overseas transaction, additional fields are used to add more information about the foreign part of the transaction.

Configuration / Feature Activation

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

Supported Configurations

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, Webinars, and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

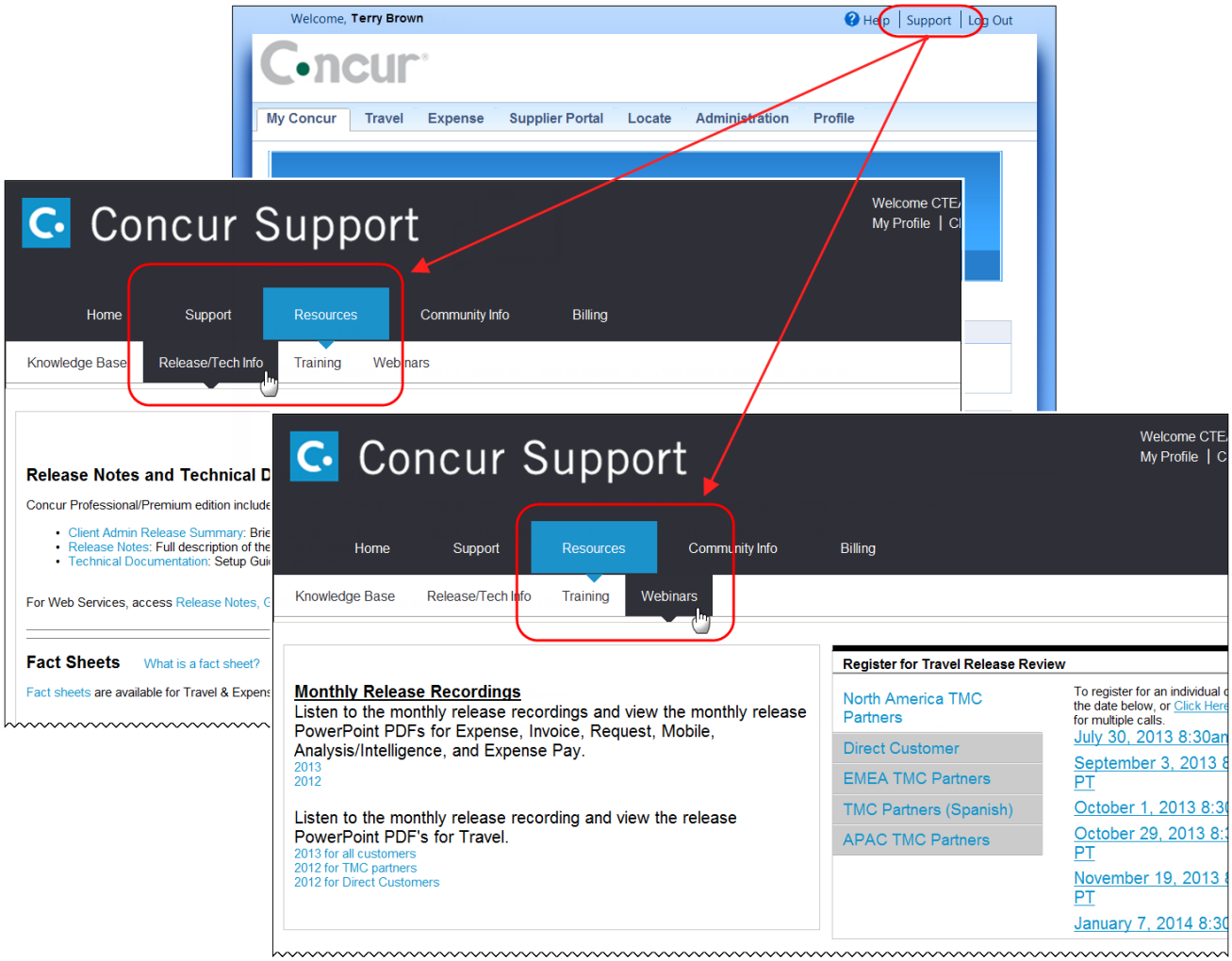
Additional Release Notes, Webinars, and Technical Documentation

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**.

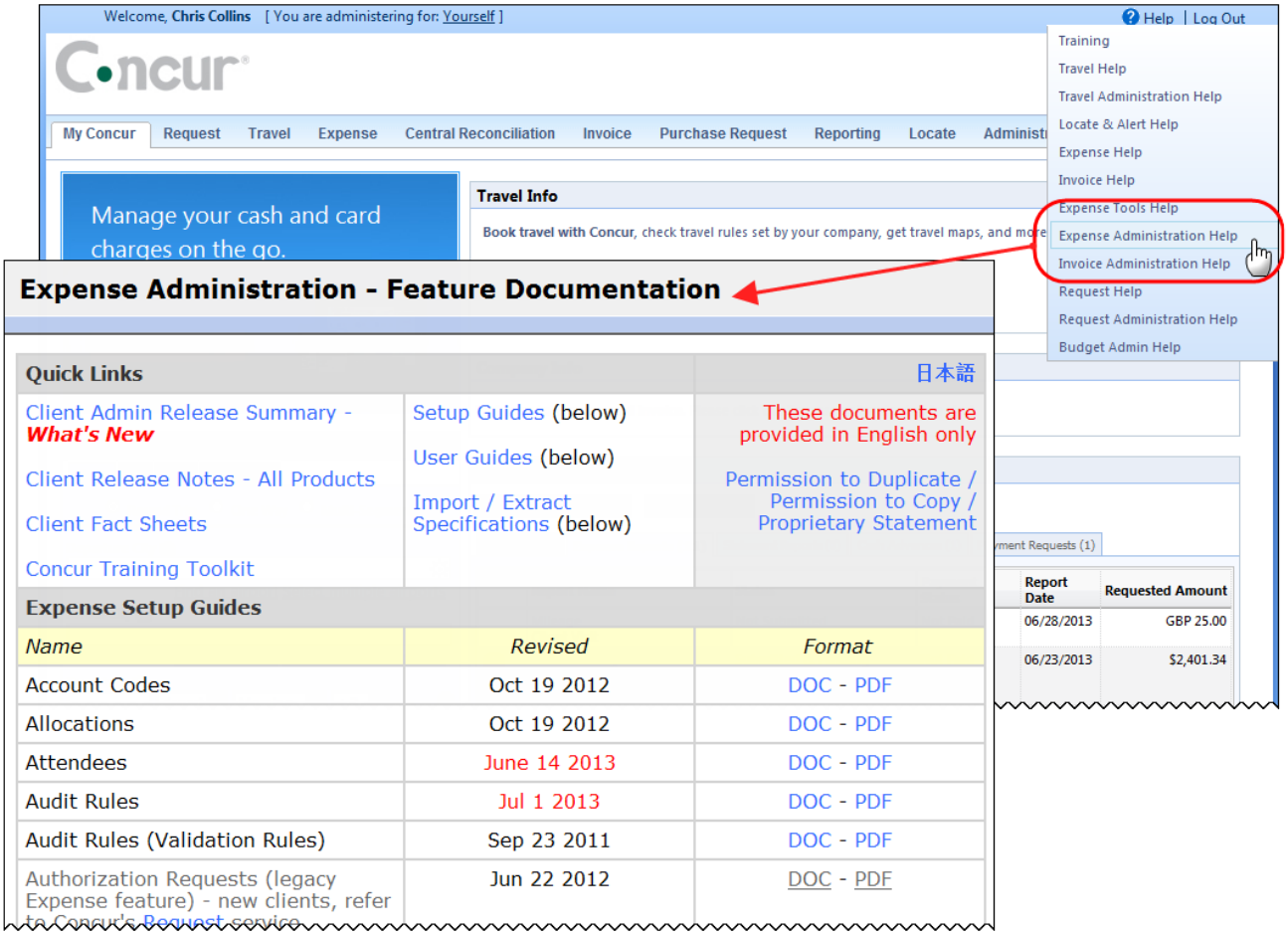
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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.



Concur Release Notes **Expense Professional / Premium** Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	**Audience**
December 2014 Initial Post: Friday, December 5, 11:00 AM PT	Client ***FINAL***

Contents

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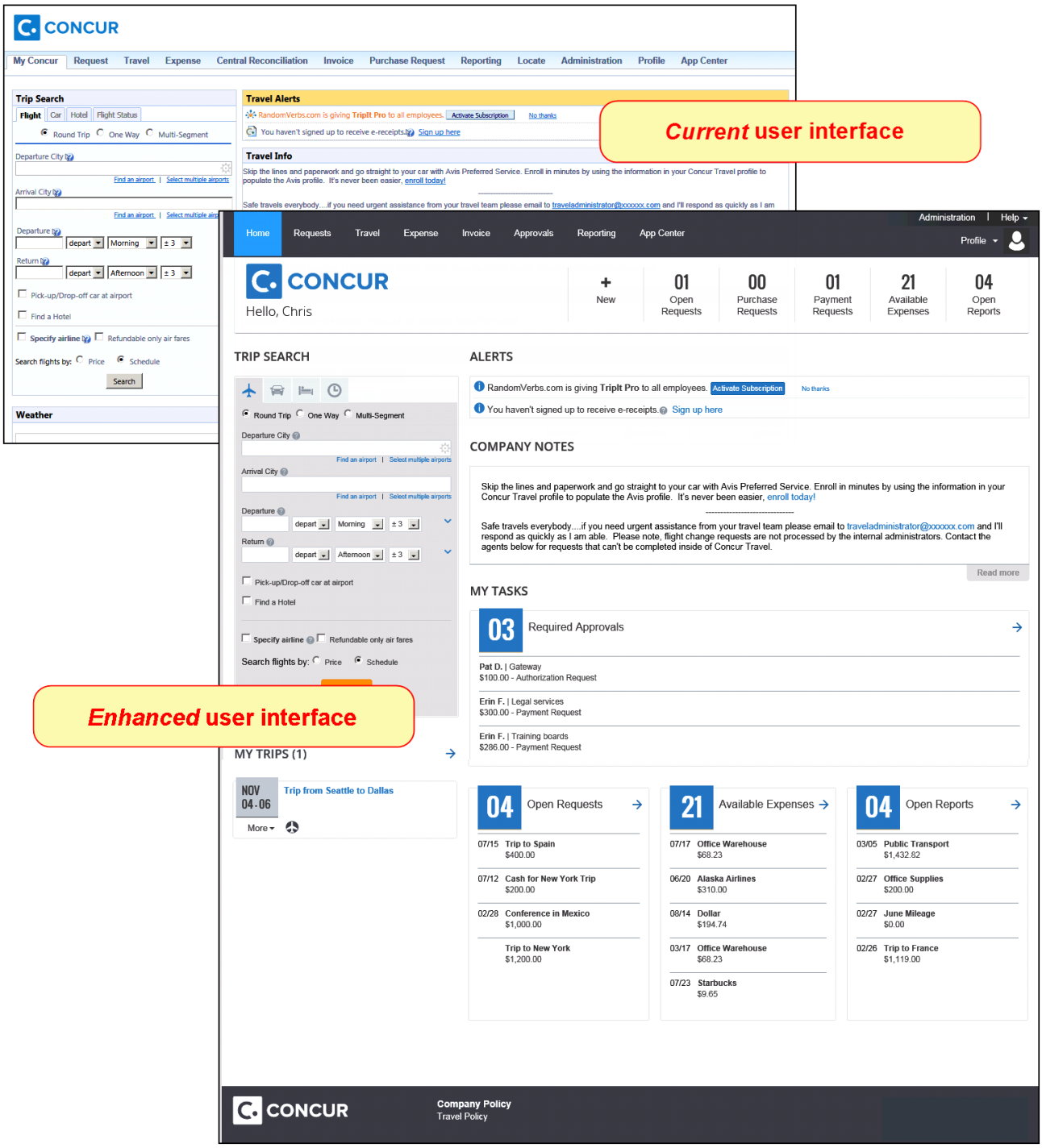

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   – or –
   In the *enhanced* UI, click **Profile** > **Profile Settings** > **Other Settings** (left menu).

Release Notes

Expense

Audit Rules: New Source and Last Modified Source Fields

Overview

Concur has updated Audit Rules with two new fields for the Entry data object, Source and Last Modified Source. These fields indicate where the expense entry was created or last modified from, with the following options:

Web: Concur Expense web site
Mobile: Concur Mobile (any OS)
Other: Concur's Platform, ExpenseIt, Credit Cards & other Smart Expenses

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows administrators to create audit rules that target messaging appropriately based on where the expense was created.

Configuration/Feature Activation

The administrator must create a new audit rule or modify an existing audit rule to use this feature.

📖 For more information, refer to the *Expense: Audit Rules Setup Guide*.

Ability to Combine Multiple Expense Entries On for All Clients

Overview

In October 2014, Concur released an optional feature that allowed users to merge certain expense entries. In the December release, Concur has updated all clients to use this feature.

The user will be able to combine reasonable types of expenses, but not expenses with like types of data.

Expense has…	No extra data	Card transaction	E-receipt	Receipt Image	Travel booking segment
No extra data	X	X	X	X	X
Card transaction	X	X	✓	✓	✓

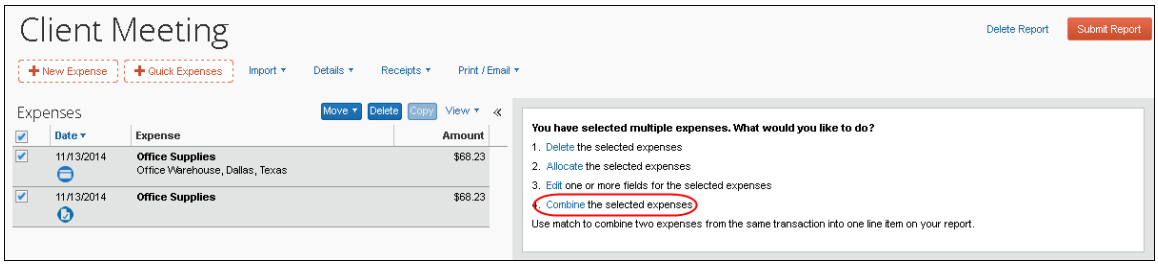
Expense has…	No extra data	Card transaction	E-receipt	Receipt Image	Travel booking segment
E-receipt	X	✓	X	✓	X
Receipt Image	X	✓	✓	X	✓
Travel booking segment	X	✓	X	✓	X

These types of expenses cannot ever be combined:

- Fixed allowances/daily travel allowance expenses
- Mileage expenses

What the User Sees

When this feature is enabled, the user can select two expenses and see the **Combine** option:



After the user clicks **Combine**, the two expenses are merged into a single entry.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement lets the user easily combine two expenses if an extra entry is accidentally created for the same expense.

Configuration/Feature Activation

This feature may be disabled using the **Site Settings** page of Expense Admin.

▶ ***To disable the feature:***

1. Click **Administration** > **Expense**.
2. Click **Site Settings** (left menu). The **Site Settings** page appears.
3. Clear (disable) the **Allow users to combine expenses into a single merged expense** check box.

4. Click **Save**.

For more information, refer to the *Expense: Site Settings Setup Guide*.

Travel Allowance: USGSA Rule Change Can Apply to Lodging

Overview

New US rules issued Oct 1, 2014 from JTR incorporate some extended trip reductions that are effective commencing on Nov 1, 2014 for trips starting at that date or existing trips that are newly extended after that date.

- Trips that are over 30 days should have the meals allowance for days 31-180 (full day allowance) reduced to 75%
- Trips that are over 180 days should have the meals allowance for days 181 and greater reduced to 55%

In the November 2014 release, Concur updated the USGSA rules in Expense to include this update for meals allowances.

Defense contractors may wish to also apply this trip reduction to Lodging, in addition to Meals. In the December 2014 release, Concur is providing a setting that allows clients to decide whether to apply the extended trip reductions to Lodging expenses.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows clients to choose whether to apply the extended trip reductions to lodging expenses.

Configuration/Feature Activation

This feature must be enabled within the travel allowance configuration. The extended trip handling must be enabled to use this new feature. The lodging option is

activated by setting the value for the extended_trip_applies_to_lodging system calculation property to Y.

📖 For more information, refer to the *Travel Allowance Configuration Guide – US/GSA*.

Standard Accounting Extract (SAE) Version 3 Now Available

A new Standard Accounting Extract (SAE), Version 3, is available with this release. This extract contains additional fields to expand on the capabilities provided by the current version, Version 2. Clients may take advantage of this new extract by working with Concur and their IT department.

Clients Requiring UUID Data for January Mexican Financial Requirements

Mexico-based clients requiring a UUID data value in their financial systems for all of their XML-based CFDi electronic receipt types may take advantage of the new **Report Entry XML Receipt UUID** field in the Version 3 extract to satisfy this requirement.

Note that this change will require close coordination with your IT financial systems support personnel. Today, the client can work with Concur Support to add this field to their existing Version 2 extract in a field position that they are not currently using.

You may:

- **Elect today** to add the **Report Entry Xml Receipt UUID** field to your existing accounting extract based on Version 2 SAE in an unused position
- **In the future (available before the end of 2014)**, take advantage of the new version 3 SAE's multiple new fields (including the UUID field) to add flexibility to your extract process

  This will involve a larger project with your IT team, but may yield benefits going forward for your company.

NOTE: *Clients need take no action, as no changes will occur on release*. This change must be specifically requested by the client.

📖 For more information about the capture of the UUID for Mexican CFDi files refer to the November Expense Professional / Premium release notes.

Configuration/Feature Activation

NO CHANGES WILL OCCUR UNLESS REQUESTED. All clients may elect to adopt the new Version 3 SAE for its additional fields, and will require close coordination with Concur and your IT department.

📖 Refer to *Chapter 13: Standard Accounting Extract, Version 3* of the *Expense – Import and Extract Specifications* for more information.

Training Admin: New Training Materials (Latin American Spanish)

Overview

With the December release, the Latin American Spanish training content that is available through the Training Admin tool will be replaced. New content that matches the Concur User Evolution Experience will replace the existing training content. If you have activated training for your company from the options provided in the Training Administrator module, the content on that toolkit will be automatically updated to the new demos and guides. Clients cannot opt out of this process. We encourage you to review and update your custom training toolkit after the December release to add and update items based on the new content.

Clients with a custom training URL (Configured on the Alternate URL tab in Training Administration) are not affected by this change.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides helpful training content to introduce users to the enhanced user interface.

Configuration/Feature Activation

The feature is automatically on for clients using Latin American Spanish; there are no additional configuration or activation steps. Training items in other languages will not be altered, and will receive updates in subsequent releases.

If the administrator does not want their users viewing the updated training modules, they have the following options:

- **Deactivate the enhanced training modules, and create custom training module links that point to the previous content.**
- **Create a custom training site that includes links to the old training modules, then direct the Training help link there.** Over the course of the next several months, all of the Concur-provided resources will be updated to the enhanced UI across all languages. A client that wishes to retain the current UI and does not wish to perform the steps listed above each month as resources are updated may choose to create a custom training page to use until they are ready to move their users to the enhanced UI.
  To replace the entire site, first build the page that will be used for the new training site in your company's intranet.

The URLs to the training modules for the current UI can be found on the Training Toolkit page:

http://www.concurtraining.com/customers/concur/trainingtoolkit/onetouch.asp

The following processes explain how to complete these actions.

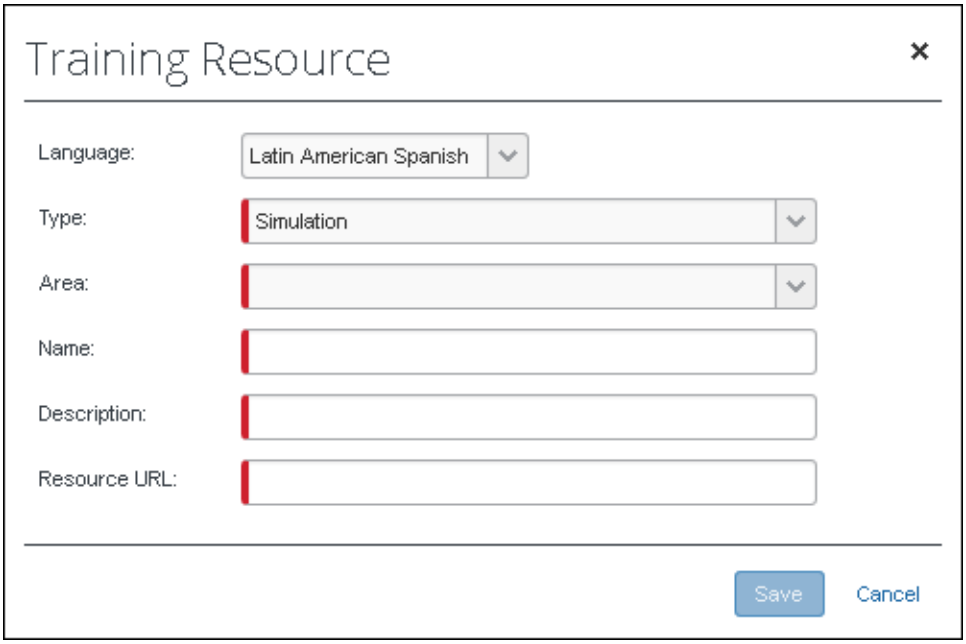
Deactivating the enhanced UI training:

1. Click **Administration** > **Expense.**

2. Click **Training Administration** (left menu). The **Training Configuration** page appears.
3. On the **Simulation Resources** tab, select **Latin American Spanish**.
4. Clear (disable) the **Active** check box for the desired simulations.

Adding a link to a previous training module:

1. Click **Administration** > **Expense.**
2. Click **Training Administration** (left menu). The **Training Configuration** page appears.
3. On the **Simulation Resources** tab, select **Latin American Spanish**.
4. Click **New**.
5. Enter the details of the training resource, including the URL.

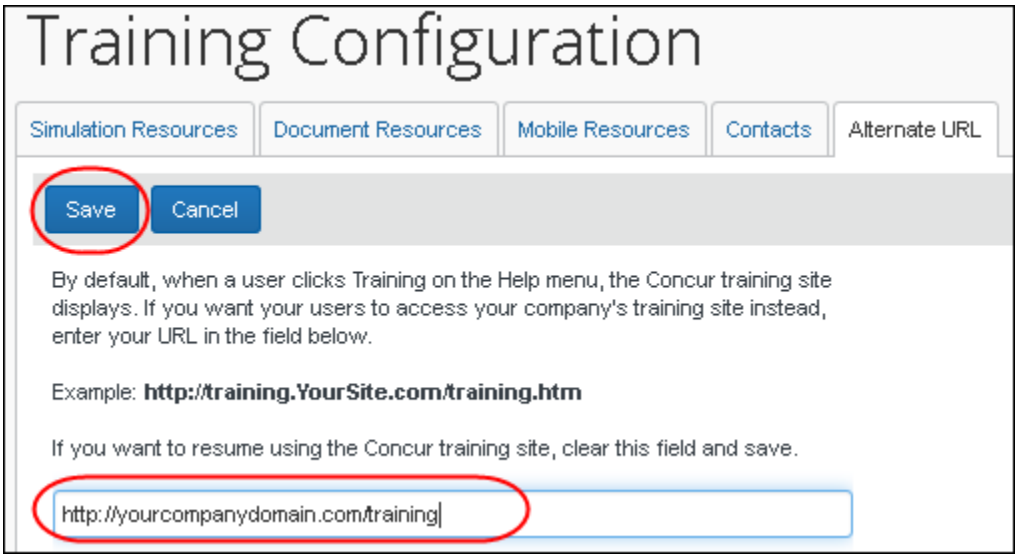


6. Click **Save**.

Directing users to a different training site:

1. Click **Administration** > **Expense.**
2. Click **Training Administration** (left menu). The **Training Configuration** page appears.
3. Click the **Alternate URL** tab.

4. Using standard URL syntax (Expense will prompt if errors), type the address you would like the Training link to open when clicked. This may be the Concur current UI training toolkit, or a custom training site of your own.



5. Click **Save**.

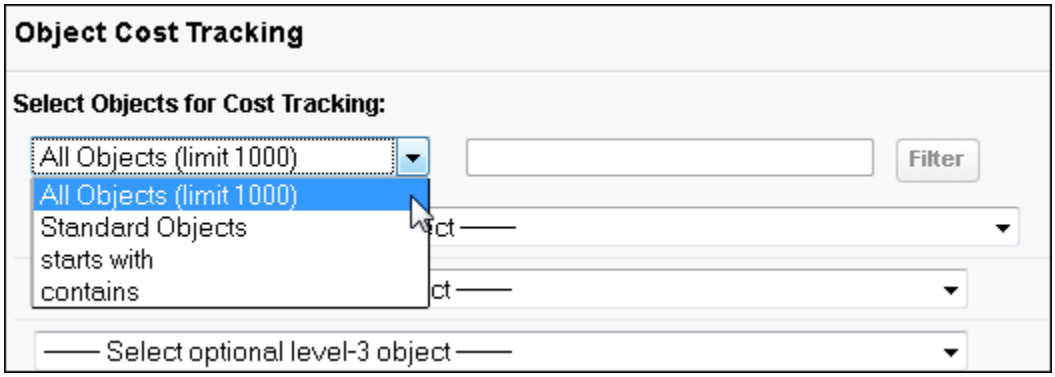
Concur Salesforce Connector: New Object Filter for Admins

Overview

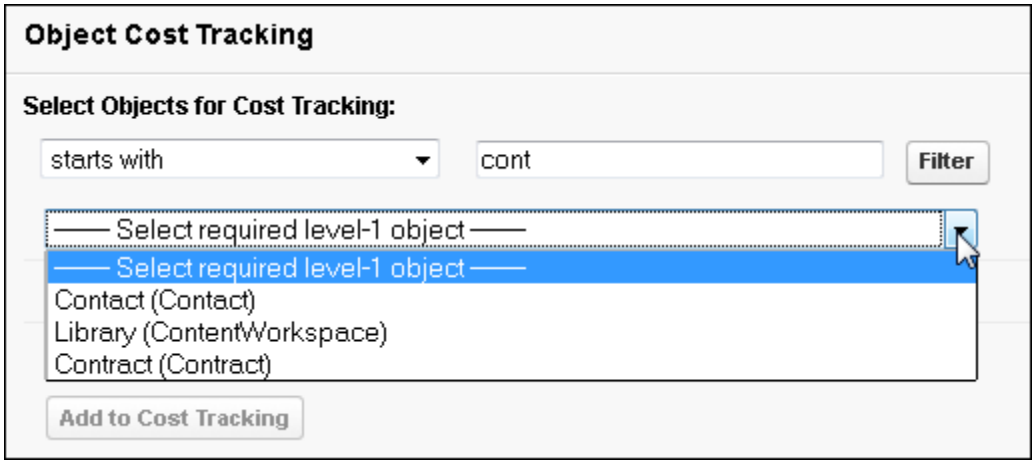
The **Cost Tracking Configuration** and **Concur Connector Admin Tools** pages of the Concur Salesforce Connector have been enhanced with additional object search options. Clients with over 1000 objects in Salesforce can now filter the list of objects by selecting All Objects, Standard Objects, or two different methods to search for text.

What the Admin Sees

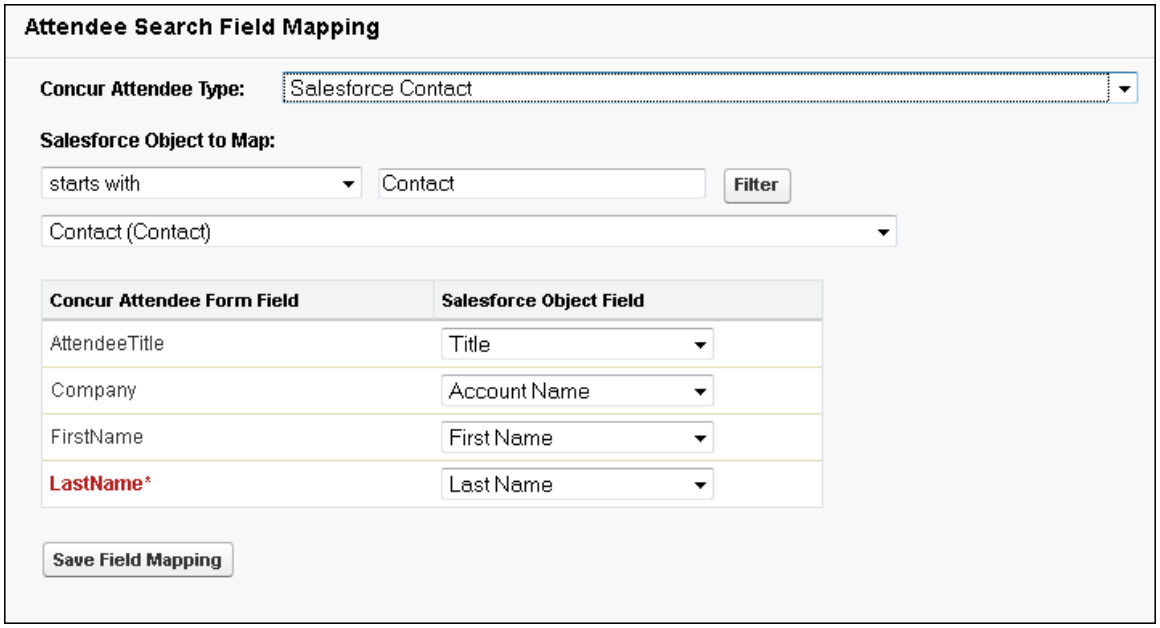
The filters appear in the **Object Cost Tracking** section of the **Cost Tracking Configuration** page.



If the admin selects *starts with* or *contains*, they can enter text in the text box, and click Filter to limit the list of objects. The text filter is based on the object name, not the object label.



The filter also appears in the **Attendee Search Field Mapping** section of the **Concur Connector Admin Tools** page, and contains the same options for filtering the object list.



BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows clients with large numbers of objects to filter the object list to make the desired object easier to locate.

Configuration/Feature Activation

This feature requires the latest connector version. Contact Concur Client Support to get the package installation information.

Concur Salesforce Connector: Search Behavior Enhanced

Overview

Concur has updated the Concur Salesforce Connector to streamline the search process for users. Prior to this release, when a user searched in a field used by the connector, the search would be an "equals" search by default. If the user entered a wildcard (*), the search would be a "starts with" search.

In the December 2014 release, the search logic is modified as follows:

- Searching with no wildcards results in a "starts with" search.
- Searching with a wildcard at the end of the string results in a "starts with" search (same as the previous result).
- Searching with a wildcard at the beginning of the string results in a "contains" search.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides the expected search behavior.

Configuration/Feature Activation

This feature is automatically on for all clients with the Concur Salesforce Connector; no additional configuration or activation is required.

Coming Soon: Classic Integration Administrator Retirement

Overview

The Integration Administrator (Restricted) tool and most portions of the Integration Administrator tool in the classic user interface will be retired in the January 2015 release. The retirement will affect all sub-pages of Integration Administrator except the **Configure Extracts, Company Cards** and **System Log** sub-pages. All the functionality on the retired sub-pages has already been moved to Import/Extract Monitor and Import/Extract Administrator in the current/enhanced user interface. After the January release, the admins will only see the Configure Extracts, Company Cards and System Log sub-pages in the classic Integration Administrator.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement removes pages that have been transitioned to the current/enhanced user interface.

Configuration/Feature Activation

This feature is automatically on for all clients; no additional configuration or activation is required.

For more information, refer to the *Shared: Import/Extract Monitor User Guide* and *Shared: Import/Extract Administrator User Guide*.

Coming Soon: Lithuania Joins the Euro January 1, 2015

Overview

With the January release on January 16th, the Lithuanian LTL currency will be removed from the available selections for manually-entered expenses and the default currency for expenses with a location in Lithuania will be changed to EUR. Incoming company card transactions will appear in the currency of the transaction, so any transactions that may be delayed in their import to Concur will be handled appropriately to show the currency of spend accurately while converting the reimbursable amount to the reimbursement currency of the user. The user may select either LTL or EUR currency today, and the default currency for an expense entered with a location of Lithuania will remain LTL until the January release to allow recording and submission of 2014 expenses.

For client with users located in Lithuania, this is a major change that must be tightly coordinated with the finance team. Please ensure that you are working with your company's internal planning team for this change so that the timing of converting the reimbursement currency of the user and the extracts of reports in the new currency is matched to the expectations of the financial systems.

Expense Pay

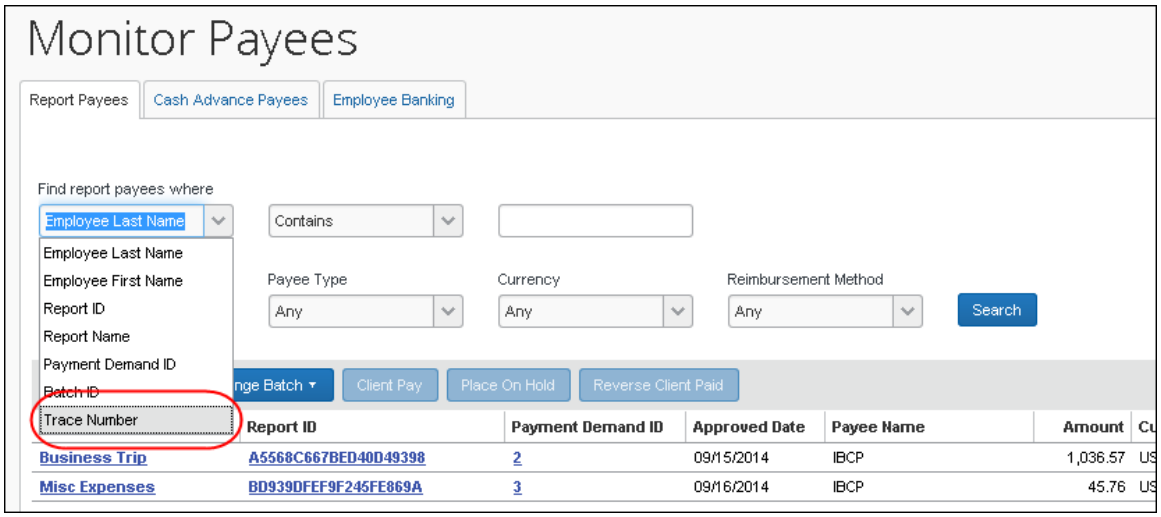
Payment Trace Number Available in Payment Manager

Overview

NOTE: This feature will only be used by a small group of clients. If you do not currently require the Trace Number, you will not need to make any changes to your process.

The Payment Trace Number for payment demands has been added to two areas in the Monitor Payees section of Payment Manager, the Report Payees tab and the Cash Advance Payees tab. The Trace Number is now available in the following ways:

- There is a new **Trace Number** column on the tabs that displays the payment trace number whenever it is present.
- The **Find** area now includes Trace Number in the **Find report payees where or Find cash advance payees where** lists.



BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides additional information that some clients can use to reconcile payments.

Configuration/Feature Activation

This feature is automatically on for all clients with Expense Pay; no additional configuration or activation is required.

Classic Reimbursement Manager Retirement

Overview

The Reimbursement Manager tool in the classic user interface will be retired in the December 2014 release. The retirement will affect all sub-pages of Reimbursement Manager except the **Extract Reconciliation** page. All the functionality on the retired sub-pages has already been moved to Payment Manager in the current/enhanced user interface. After the December release, the admins will only see the Extract Reconciliation sub-page in Reimbursement Manager.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement removes pages that have been transitioned to the current/enhanced user interface.

Configuration/Feature Activation

This feature is automatically on for all clients with Expense Pay; no additional configuration or activation is required.

Supported Configurations

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, Webinars, and Technical Documentation* in this document for information about accessing the other release notes and the monthly browser certifications.

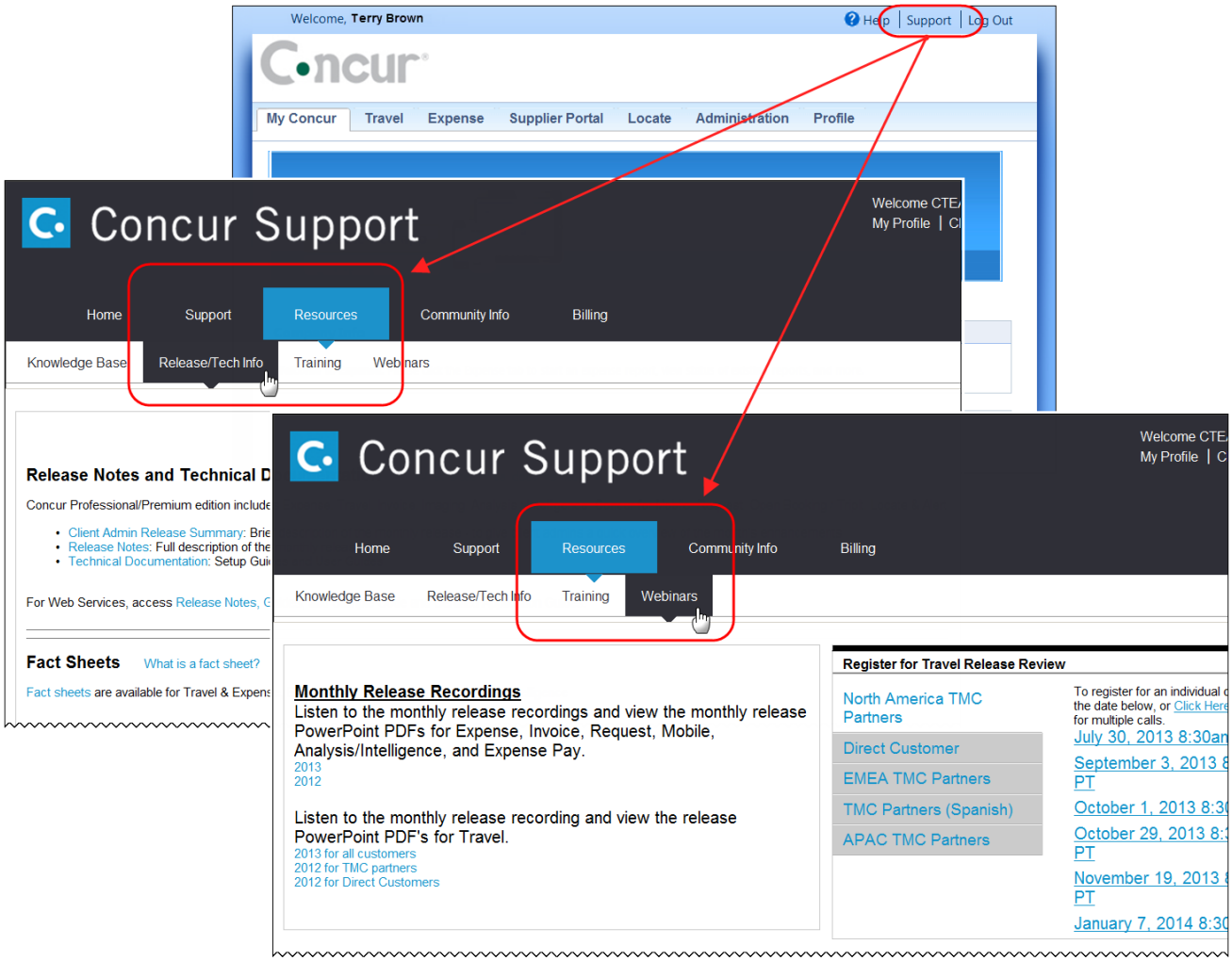
Additional Release Notes, Webinars, and Technical Documentation

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.