

This document lists:

- **Major features** ([Table #1](#)) that are not yet available in NextGen Expense
- **Minor feature options** ([Table #2](#)) that are not yet available in NextGen Expense – For some of the minor feature options, there is an alternative/workaround. For some, there is no workaround and a client using this feature should wait to move their users to NextGen.
- **Features/Options that will not be supported** in NextGen Expense ([Table #3](#))
- **Features/Options incorporated** ([Table #4](#)) that were once in Table #1 or #2 that are now in Nextgen Expense

Be aware that some of these feature and options listed here may not be available to you, based on your company's configuration.

Table #1: Major Features

IMPORTANT: These **major** features are not yet available in NextGen Expense:

- Japan Public Transport (JPT)

IMPORTANT: Customers who use JPT 1.0 must transition to JPT 2.0 at the same time they move to NextGen Expense (for example, by group for those users who rely on JPT). **JPT 1.0 will not be available on NextGen Expense.** More information on timing and transition will be released on JPT 2.0 when it's available. Those customers who use JPT should continue to keep those users on the current UI.

- Company Billed Statements (CBS)

Table #2: Minor Feature Options

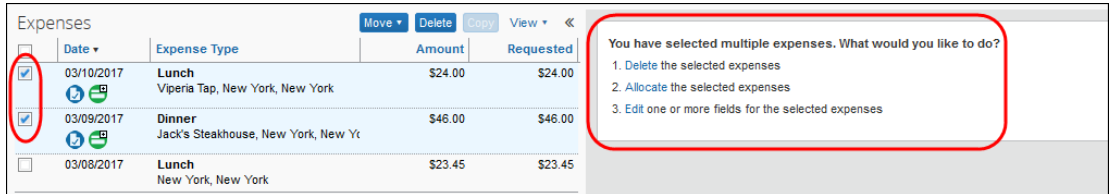
Option	Description in the existing UI	Alternative (if any)
General expense options		
Edit multiple expenses and itemizations	<p>In some cases, when multiple expenses are selected on the expense report, certain fields that are common to the selected expense entries can be edited. This saves time for the user since they do not have to open and edit each expense entry individually.</p> 	The user must edit each expense entry individually.

Table #2: Minor Feature Options

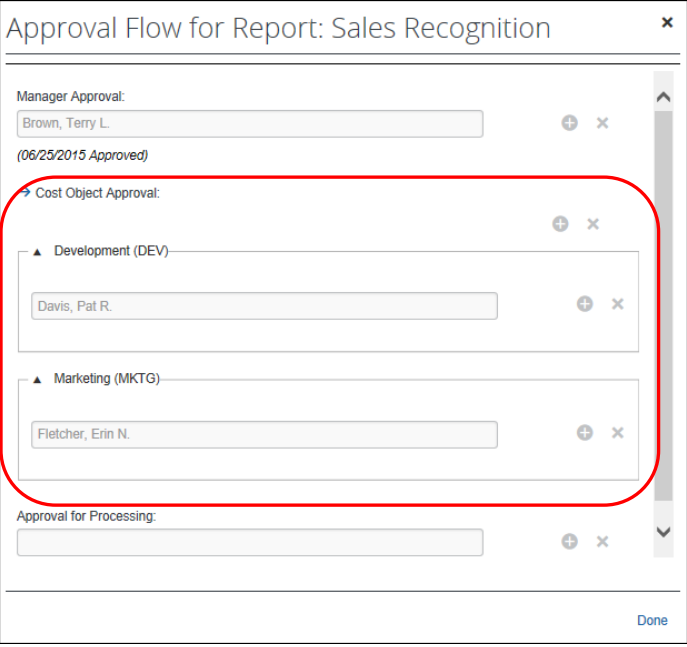
Option	Description in the existing UI	Alternative (if any)
<p>Approval Flow details for Cost Object Approver Step</p>	<p>The current UI allows the user to expand the display on the Approval Flow page for the Cost Object Approver step in the workflow to show the current approver for each cost object.</p> 	<p>The user may look at the audit trail to see the past approvals and the current approver for each cost object in the cost object step.</p>
<p>Expense type as first level of connected list (Professional only)</p>	<p>In some cases, a very specialized connected list is configured with the expense type as the first level of that list. The second and subsequent fields are driven by the expense type that is selected, allowing the lower-level fields to be used as sub-expense type or to limit selections based on the nature of the expense.</p>	<p>None</p>

Table #2: Minor Feature Options

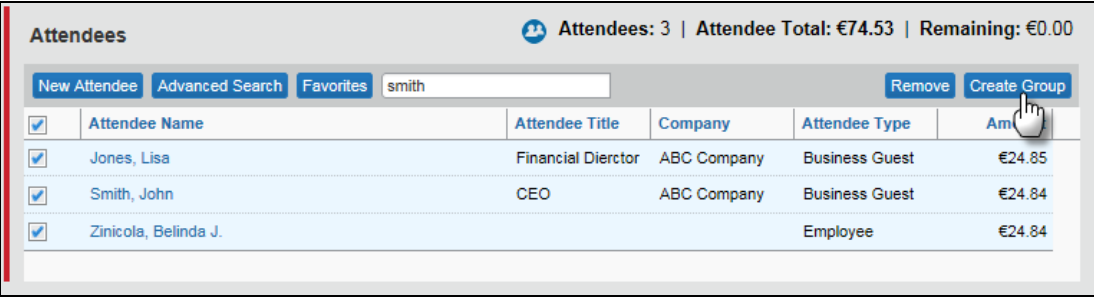
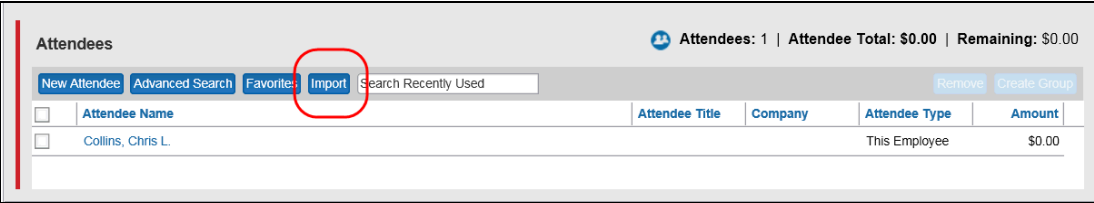
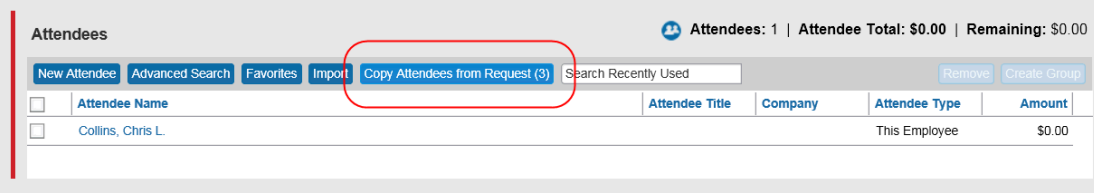
Option	Description in the existing UI	Alternative (if any)
Attendees		
<p>Create an attendee group from inside an expense entry</p>	<p>Attendee favorite groups allow the user to reuse the same set of attendees on another expense with a simple selection of the group. While viewing the attendees on an expense entry, the user can select some or all of the attendees to create a reusable attendee group.</p>  <p>The screenshot shows the 'Attendees' section with a search bar containing 'smith'. Below the search bar are buttons for 'New Attendee', 'Advanced Search', 'Favorites', 'Remove', and 'Create Group'. A table lists attendees: Jones, Lisa (€24.85), Smith, John (€24.84), and Zinicola, Belinda J. (€24.84). The 'Create Group' button is highlighted with a mouse cursor.</p>	<p>An attendee group may be created from the User Profile area named Favorite Attendees</p>
<p>Personal attendee upload from an Excel file</p>	<p>The user can download an Excel template, enter attendee information, and then upload to Concur. Concur will then read the attendees and add them to the expense entry or present errors for the user to resolve.</p>  <p>The screenshot shows the 'Attendees' section with a search bar containing 'Search Recently Used'. Below the search bar are buttons for 'New Attendee', 'Advanced Search', 'Favorites', 'Import', 'Remove', and 'Create Group'. A table lists one attendee: Collins, Chris L. (This Employee, \$0.00). The 'Import' button is circled in red.</p>	<p>The user can manually search for or enter attendees within the expense.</p>
<p>Attendees from Request</p>	<p>In the existing UI, if the customer uses Concur Request and if an expense requires attendees and if the attendees are listed in the request, when the user brings the request into Expense, the user can copy the attendees from the request to the expense entry.</p>  <p>The screenshot shows the 'Attendees' section with a search bar containing 'Search Recently Used'. Below the search bar are buttons for 'New Attendee', 'Advanced Search', 'Favorites', 'Import', 'Copy Attendees from Request (3)', 'Remove', and 'Create Group'. A table lists one attendee: Collins, Chris L. (This Employee, \$0.00). The 'Copy Attendees from Request (3)' button is circled in red.</p>	<p>None, user must enter the attendees manually</p>

Table #2: Minor Feature Options

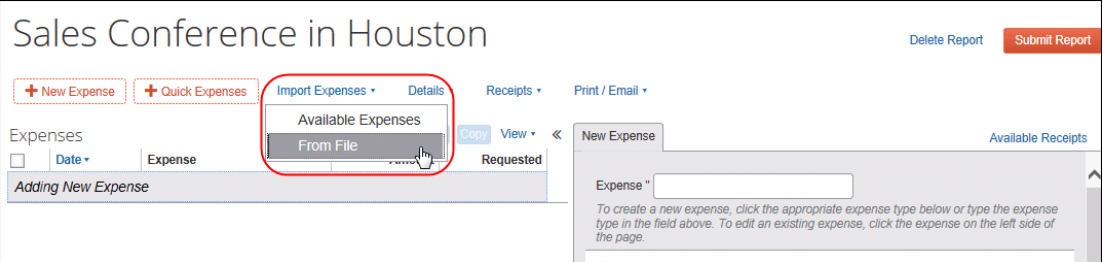

Option	Description in the existing UI	Alternative (if any)
Copy Down Attendees to Itemization	In the existing UI, Expense can be configured so that any attendees on an expense are automatically copied down to that expense's itemizations.	None, user may enter attendees on the itemization
Views		
Detail View (Configurable view of Expense list)	Using the View option in the expense report, the user can view the expense report in a layout configured by the administrator.	None. The user may view additional fields by opening the Expense Details.
Receipts/Images		
Drag and Drop receipts	Users can drag-and-drop receipt images onto an expense.	User may link receipts to the expense without use of drag and drop.
Card		
Personal card import from downloaded bank file	<p>Users can import personal credit card transactions that have been downloaded from their own card account.</p> 	The user must manually type in the expenses.
Redirect funds (IBCP card support)	<p>In certain cases, an Expense user can elect to redirect funds owed them by their company to pay all or part of the balance they may owe on a company card.</p> 	None.

Table #2: Minor Feature Options

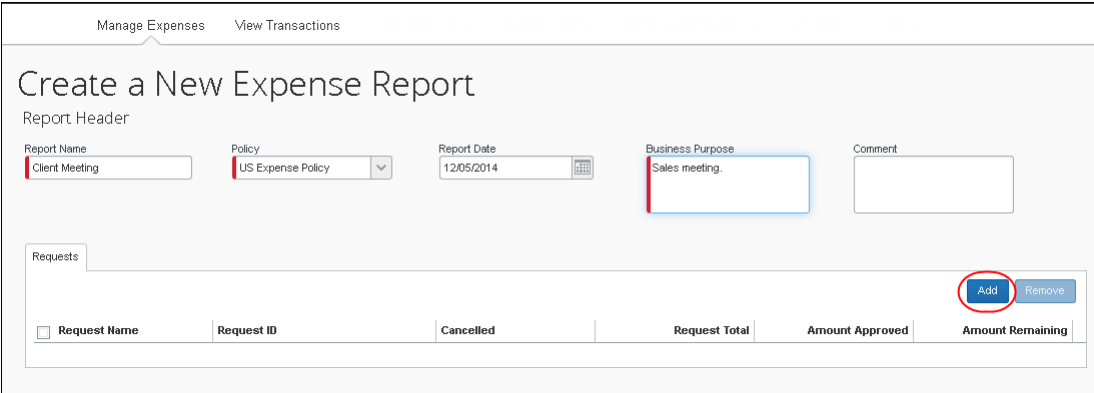
Option	Description in the existing UI	Alternative (if any)
Request		
Ability to link Request during report creation	<p>If using Concur Request, the user can assign an approved request to a report header during the report creation process. The items on the request are then matched to the items on the report.</p> 	<p>User may use the 'one-click' link from request list to create the expense report -OR- The request may be linked to the report after the report header has been created. Report header fields that would normally default from the linked request would have to be typed in by the user.</p>
Expense Approvers		
Approver IU	Currently, NextGen Expense includes only end-user UI pages. Updating the Expense approver pages is also a priority. The approver pages will be updated in a second phase, after the end-user features reach parity.	Continue to use the approver pages in the existing UI

Table #3: Features that will NOT be supported in NextGen Expense

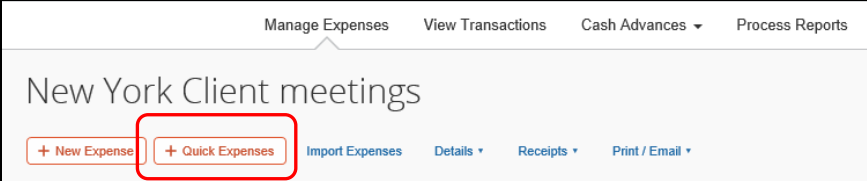
Quick Expense Entry Grid (Quick Expense / Quick Mileage)	<p>The quick expense entry grid will not be included in the NextGen Expense UI. Based on the extremely small usage of this page, it will no longer supported.</p> 	None
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Table #3: Features that will NOT be supported in NextGen Expense

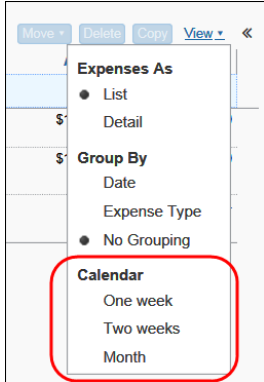
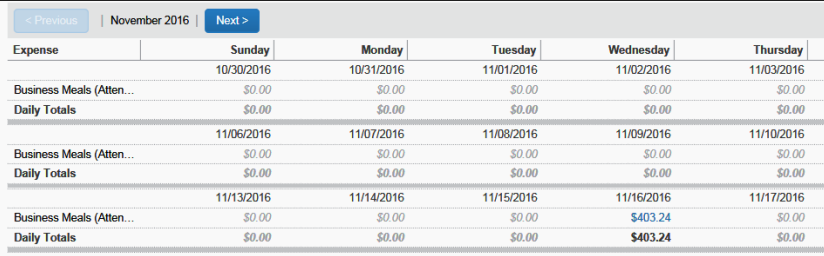
<p>Expense report - Calendar View</p>	<p>Using the View option in the expense report, the user can view the expense report in a calendar-like layout. Based on the extremely small usage of this page, it will no longer supported.</p>  	<p>None.</p>
<p>Attendees from Outlook</p>	<p>Import attendees from a calendar invitation email sent to Concur</p>	<p>The user can manually search for or enter attendees within the expense.</p>

Table #4: Features that have already been incorporated into NextGen Expense

From Table #1 - Major features

Released and available:

- Travel Allowance (released May 2)
Current travel allowance is visible to your users as part of their report creation process, with no changes required for your configuration. Please refer to the [End User Transition Guide](#) to review some small navigational changes for getting into the travel allowance area.
- Japan E-Bunsho (timestamped receipts) (released June 12). Please refer to the [End User Transition Guide](#).

From Table #2 - Minor features

General expense options

<p>Mileage Calculator (using Google Maps)</p>	<p>Released Mar 7 2018</p>
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Table #4: Features that have already been incorporated into NextGen Expense

Drive – Add Drive expenses to a report	September 2018
Most recently used for: <ul style="list-style-type: none">• Expense Type• Location• Search List	Released Mar 7 2018
Expense Assistant "Try It" trial	Released May 2 2018
List items from External Sources	Released September 28 2018
Custom API via LaunchExternalURL	Released September 28 2018
Cash Advance (Professional only)	
All features	Released Dec 8 2018
Attendees	
Attendees from external sources	Released May 2 2018
Attendees – Traveling/ Not Traveling Status	Released May 16 2018
Report/Expense fields	
Custom itemization wizard	Released July 25 2018
Conditional field display	Released August 22 2018
Receipts/Images	
Travel Diary	Released September 28 2018
CFDi (Mexico XML file/ receipt)	Released Mar 7 2018
Card	
Personal card via web connection	The Refresh link will not be available in NextGen Expense on the Manage Expenses page; card transactions refresh automatically

Table #4: Features that have already been incorporated into NextGen Expense

Request	
One-click from the request	Released Jul 25 2018
Sponsored Guest	
Sponsored Guest: Sponsor field on report header	Released Jul 11 2018
Value Added Tax (VAT)	
Editable tax amount and the Calculate Tax link	Released Mar 7 2018
VAT (with Tax forms)	Released Mar 7 2018