Concur Release Notes **Travel Request**	
Month	**Audience**
January 2013	Client

Contents

Summary

The major features are:

- Multi-leg trips for air segments
- New icon for delegate actions
- Parent expense types used in rules
- New default view for approvers
- Company employees automatically added to attendee search
- Main Destination Fields – Enhancements

The *Additional Information* section of these release notes shows where to find:

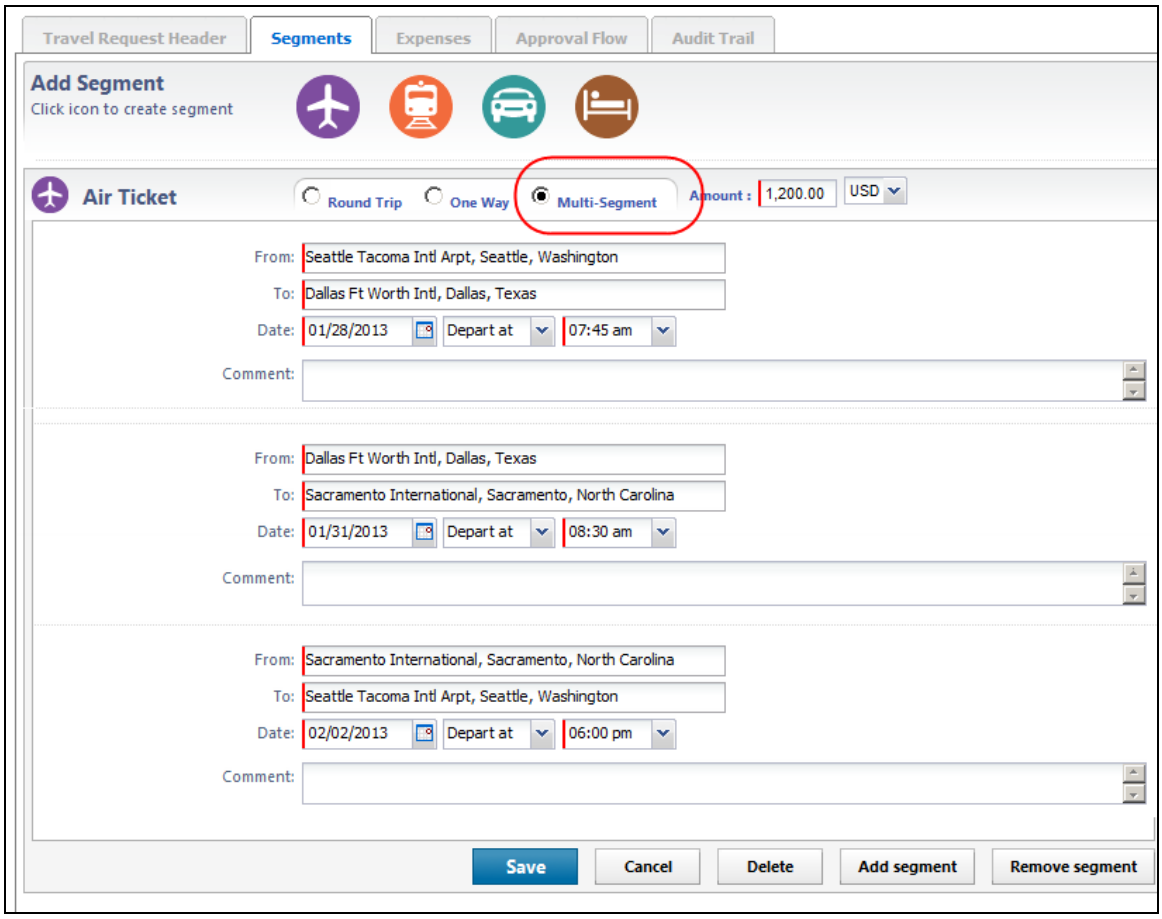
- Technical documentation about Travel Request and other Concur products
- Release Notes about Travel Request and other Concur products

Release Notes

Multi-Leg Trips for Air Segments

Overview

Multi-leg trips are now available for air segments.



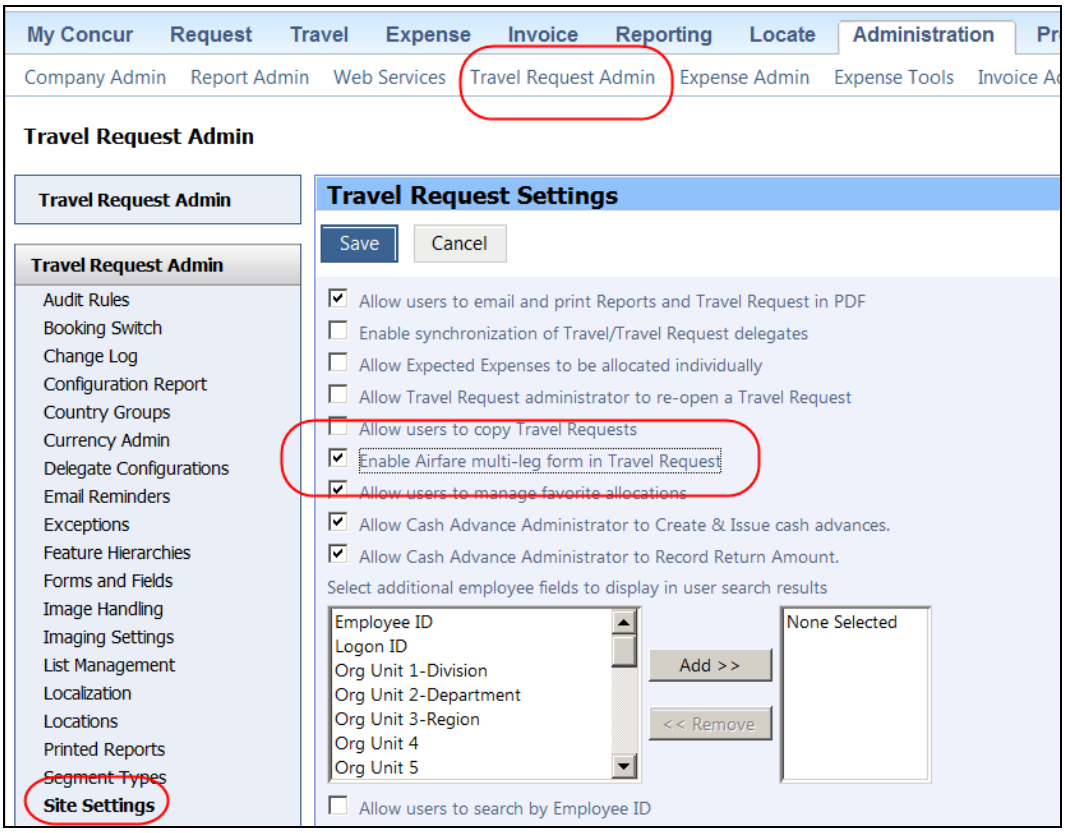
This enhancement benefits users in two ways:

- Without having to rely solely on describing it in the **Comment** section, users can now clearly define the multi-leg information for a trip that has been booked outside Concur Travel. The approver and the back office, therefore, get a precise view of the trip – the way it will actually happen. For example, to accurately describe the trip is not a direct-flight round-trip from Paris to Seattle; there is a stop in Amsterdam.
- If integrated with Expense, the user can now fully match the multi-leg trip with the proper expense, thus improving reporting and audit rules capability. Prior to this, the process was cumbersome.

Configuration

This feature is activated with a site setting.

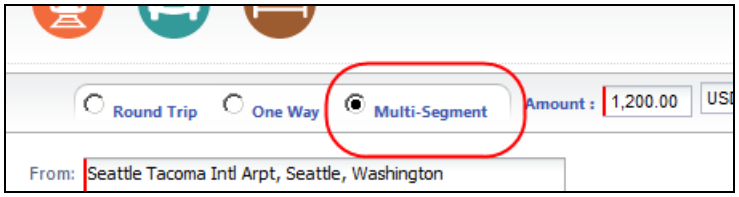
1. Select Administration > Travel Request Admin > Site Settings (left menu).



2. Select **Enable Airfare multi-leg form in Travel Request**.

3. Click **Save**.

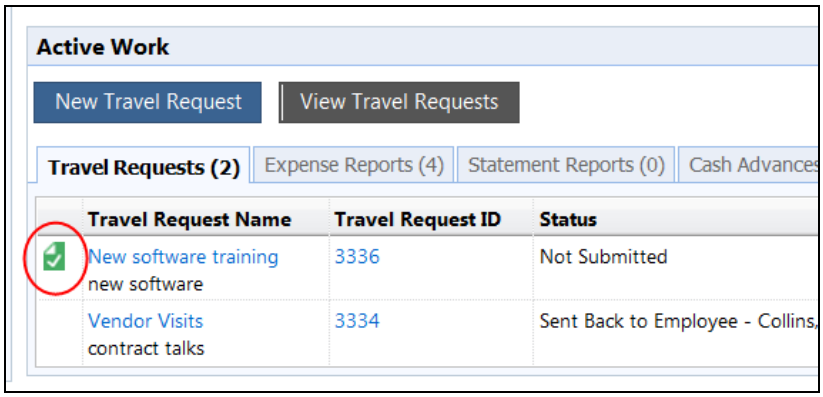
No additional action is necessary. The **Multi-Segment** option now appears automatically on the **Segments** tab for air segments.



New Icon for Delegate Actions

Overview

A new icon appears in Travel Request.



It appears if:

- **User delegate:** A delegate has created a travel request on behalf of a user ***and*** the delegate does not have the authority to submit the travel request. After preparing the travel request, the delegate clicks **Notify Employee**. This icon appears in the **Active Work** section of My Concur for the user as an indication that the request is ready for submission.
- **Approver delegate:** A delegate has previewed a travel request on behalf of an approver ***and*** the delegate does not have the authority to approve the travel request. After previewing the travel request, the delegate clicks **Notify Approver**. This icon appears in the **Approval Queue** section of My Concur for the approver as an indication that the request is ready for approval.

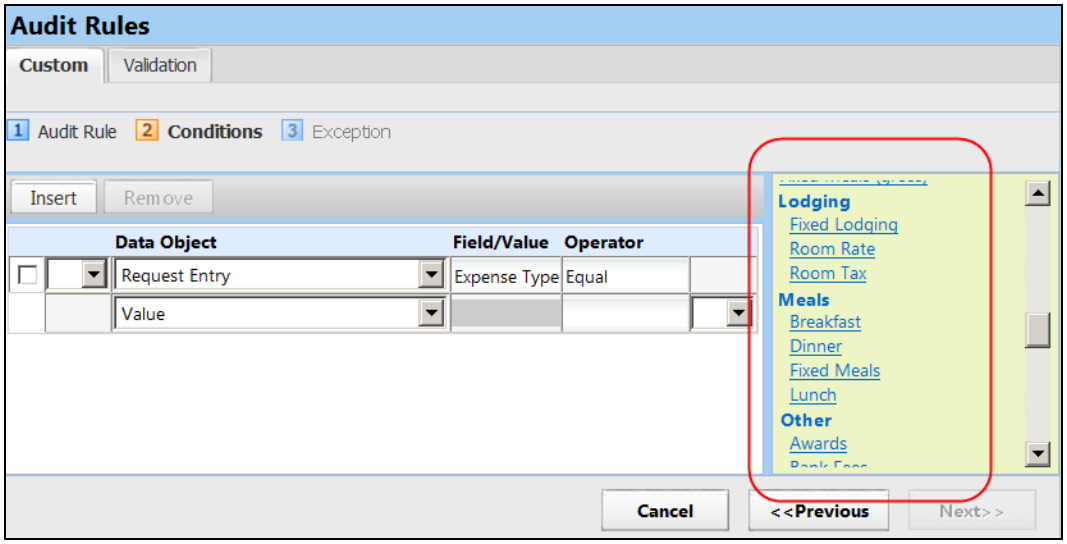
Configuration

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

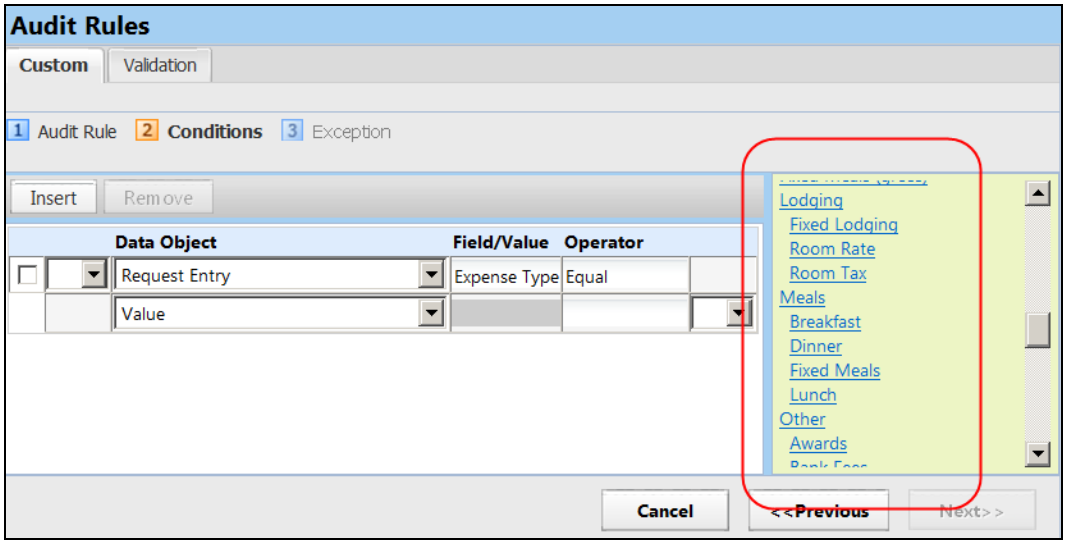
Parent Expense Types Used in Rules

Overview

Prior to this release, rules could be created with expense types but not the *parent* expense types. For example, a rule could be created for Breakfast, Lunch, and Dinner but not Meals.



With this release, the parent types can be used in audit rules, workflow rules, and validation rules. So, if a rule was created for Meals, it would include all expense types listed below it.



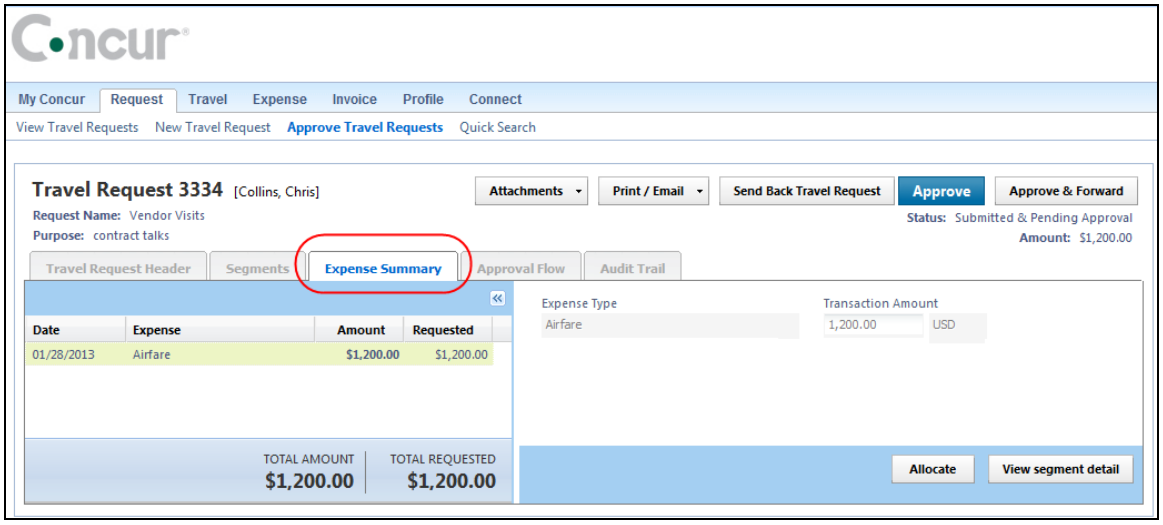
Configuration

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

New Default View for Approvers

Overview

When an approver opens a travel request, the default view is now the **Expense Summary** tab, which provides the most comprehensive starting point for the approver. The approver can then navigate as desired.



NOTE: The **Expense Summary** tab appears whether or not expected expenses are included in the travel request and, in fact, whether or not Travel Request is configured to use expected expenses.

Configuration

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

Company Employees Automatically Added to Attendee Search

Overview

With this release, there is a new process that will include all company employees as attendees – without users having to add them individually.

Configuration

Travel Request shares the attendee configuration with Concur Expense; all steps required to use this new feature are completed in Concur Expense.

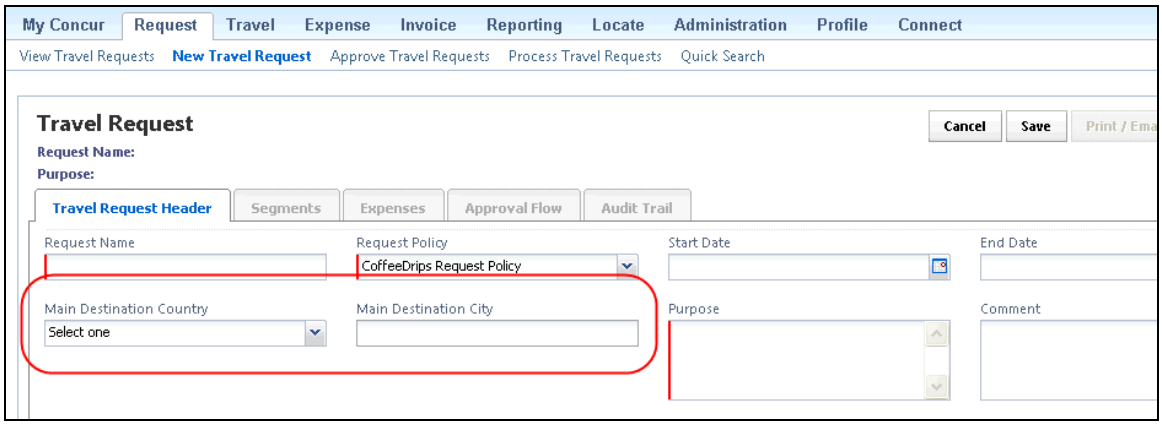
For more information, refer to this month's Release Notes for Concur Expense.

Main Destination Fields – Enhancements

Overview

Automatic Population in the Travel Request Header

With last month's release, the client was allowed to add the new **Main Destination Country** and/or **Main Destination City** fields to the travel request header.



With this release, if Travel Request is integrated with Concur Travel ***and*** if the destination fields are configured on the travel request header to be editable by the user, then Concur will populate the destination fields for the user.

- For self-booked air and rail segments, the *city* and *country* fields will be populated with information obtained from Concur Travel.
- For other self-booked segments, the *country* field will be populated with information obtained from Concur Travel.

The information provided by Concur Travel appears in the fields but the user can edit the information if desired.

NOTE: If the destination fields are ***not*** on the header or are not editable by the user, then Concur will not attempt to populate the fields.

Rules

The **Main Destination City** and **Main Destination Country** fields have been added to audit rules, validation rules, workflow rules, and email reminder rules.

Refer to the *Travel Request: Audit Rules Setup Guide*, *Travel Request: Audit Rules – Validation Rules Setup Guide*, *Travel Request: Email Reminders Setup Guide*, and the *Travel Request: Workflow - General Information Setup Guide*.

Extract

The destination fields are available in the standard travel request extract.

📖 Refer to the *Standard Travel Request Extract Specification*.

Configuration

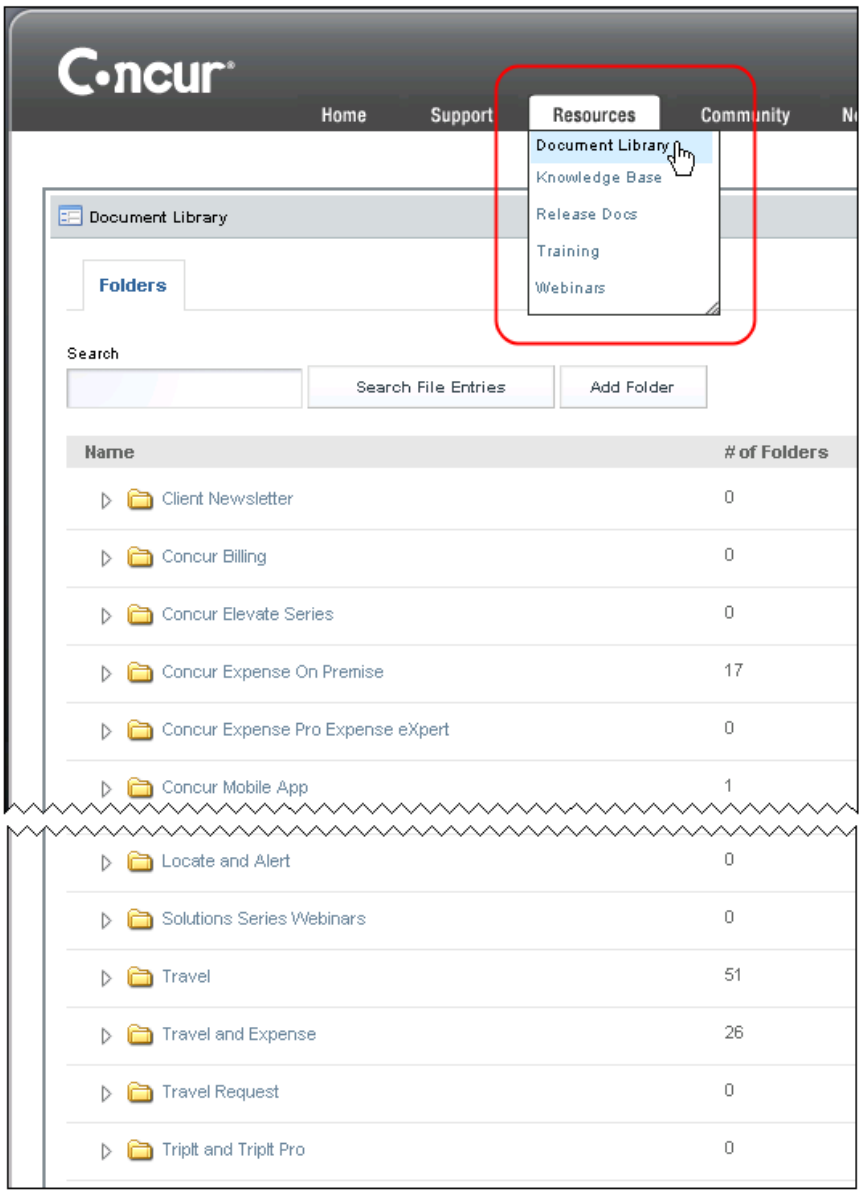
This feature is on automatically; there are no configuration or activation steps.

Additional Information

Where Do Clients Find Additional Documentation About Travel Request and Other Concur Products?

Concur Client Central > Resources > Document Library

A full set of technical documentation and release notes are available on Concur Client Central at Resources > Document Library.



Concur Client Central > Resources > Release Documentation

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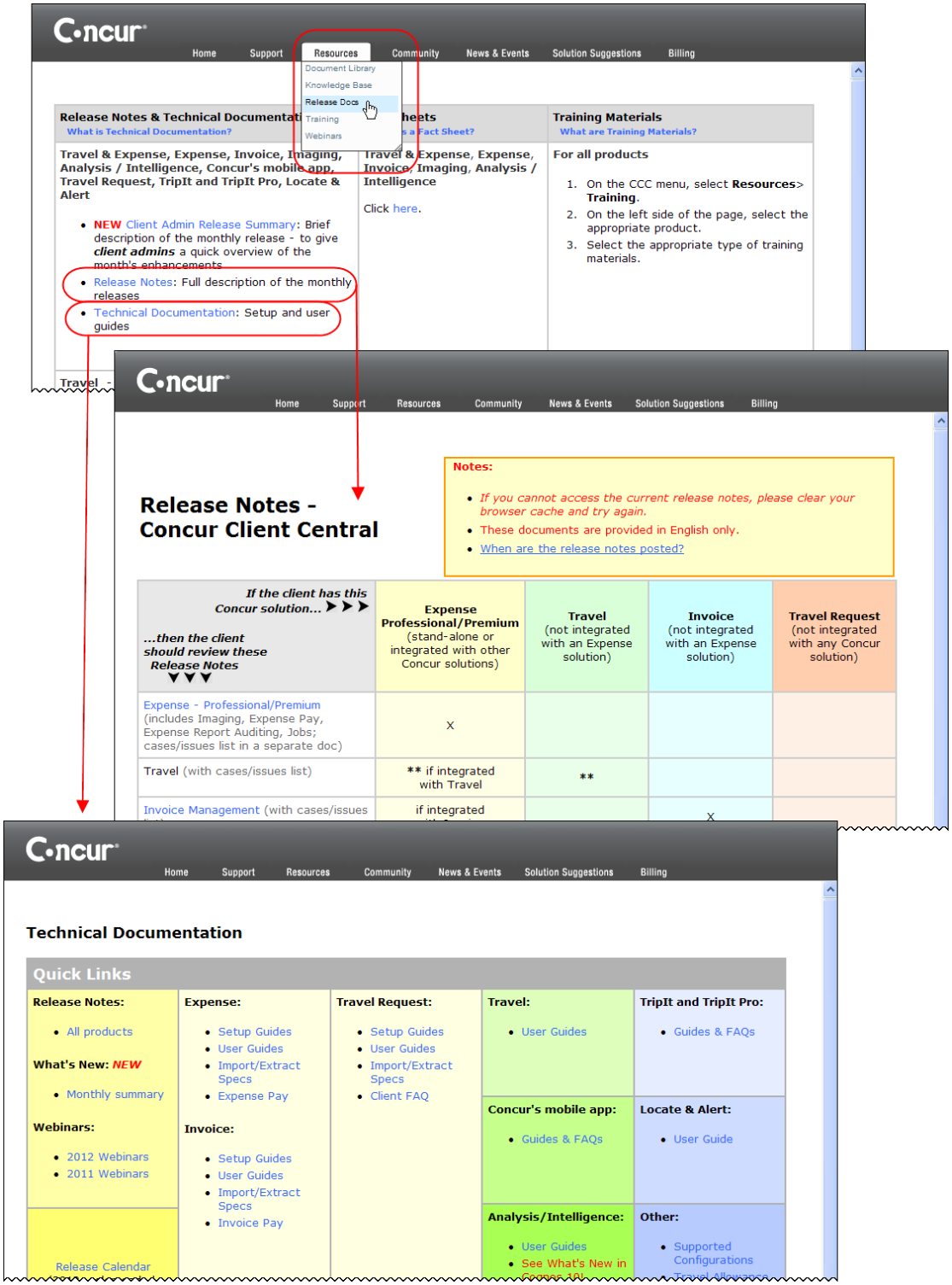
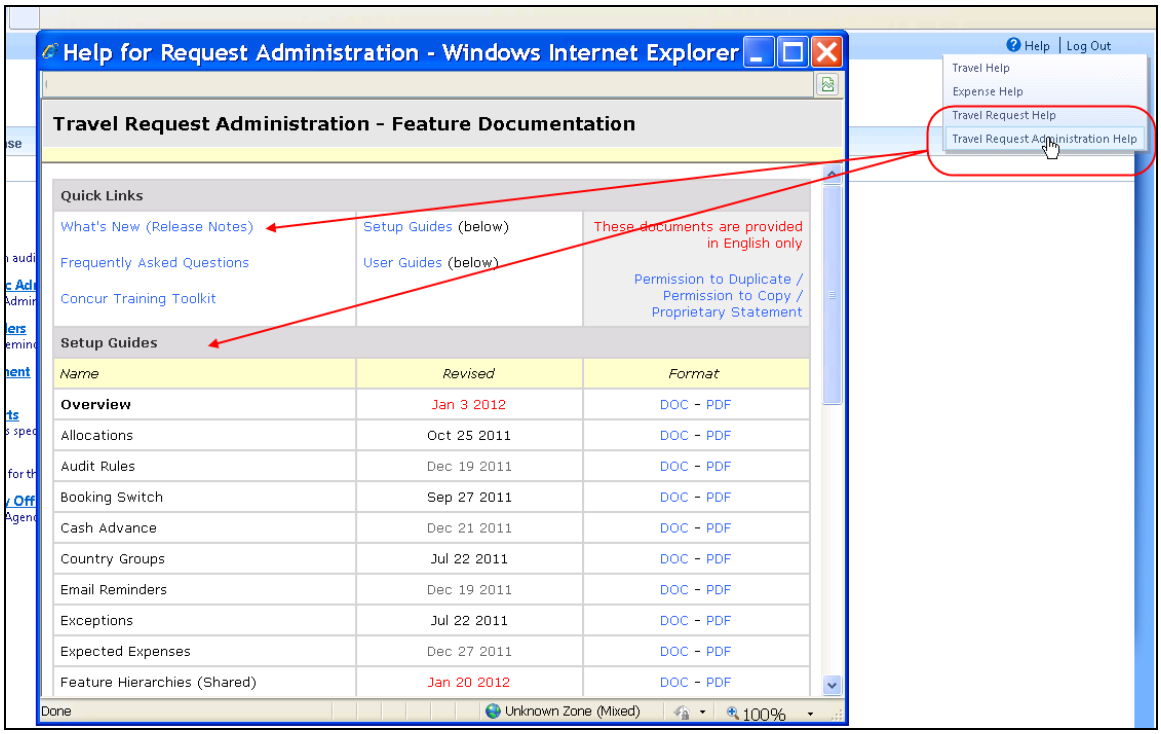


Online Help

Users with the Travel Request Administrator role can also access technical documentation and release notes in online help.



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
February 2013	CLIENT

Contents

Summary

The major features are:

- Name change from "Travel Request" to "Authorization Request" – or simply "Request"
- New request types, defined by policy
- Setting to control the cost object approver display
- Redirect URL option now available for Help > Training link
- New information in the Standard Request Extract

The *Additional Information* section of these release notes shows where to find:

- Technical documentation about Request and other Concur products
- Release Notes for Request and other Concur products

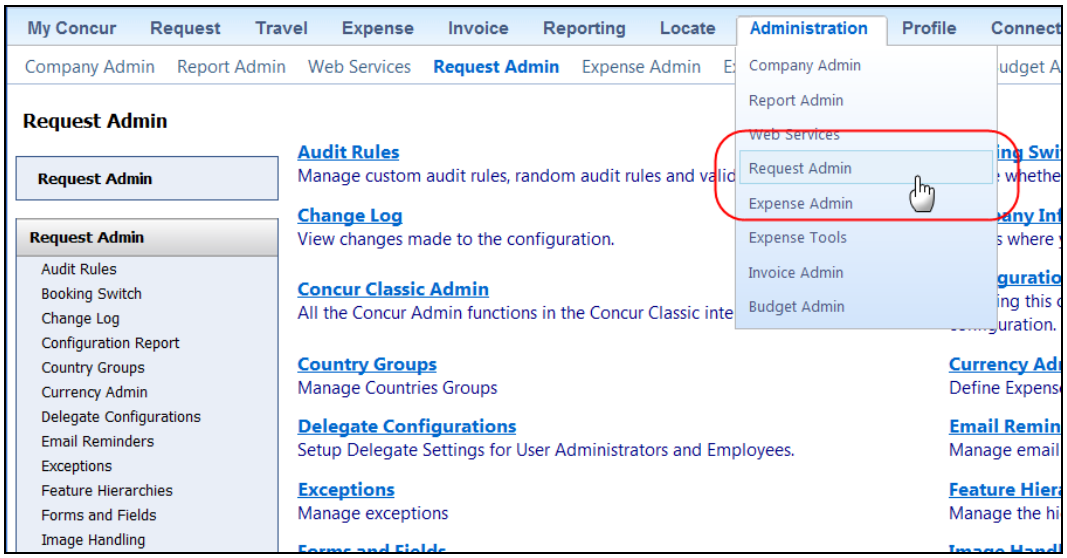
Release Notes

Name Change from "Travel Request" to "Authorization Request" (or simply Request)

Overview

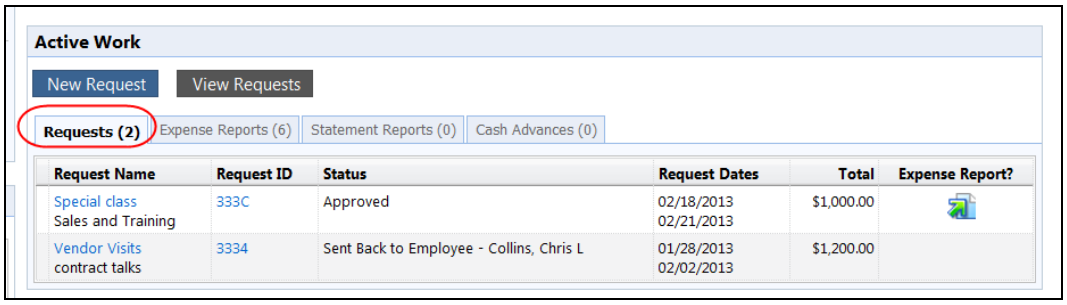
Concur is changing the name of the Travel Request service to Authorization Request – or simply Request – to better align with its broader capabilities. Currently, the Travel Request service is primarily used for pre-approval of trip-related expenses and cash advances. Actually, it has all of the features needed to be used for pre-approval of purchases, subscriptions, business meals, etc.

In February, all users will see changes in the user interface. Administrators will see changes, such as, the **Travel Request Admin** menu option becomes **Request Admin**, and so on.

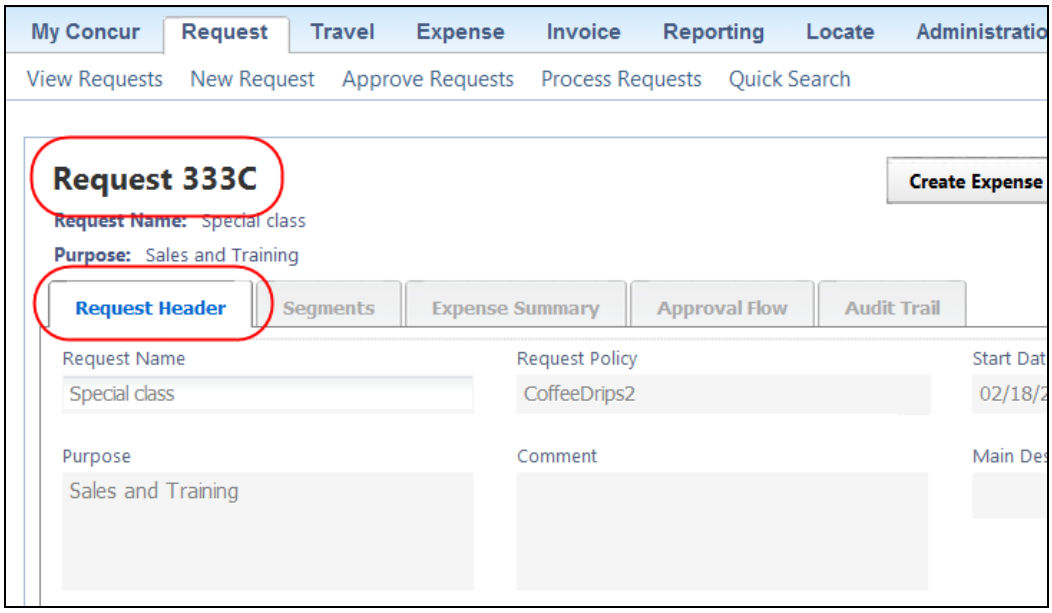


Users and approvers will see changes in the **Active Work** and **Approval Queue** section of My Concur, such as:

- Tab names, like **Travel Requests** becomes **Requests**
- Column names, like **Travel Request Name** becomes **Request Name**, **Travel Request ID** becomes **Request ID**, and so on



With a request open, users and approvers will see the same changes on tabs, columns, and options.



Online Help and Documentation

Help and the other documentation will be updated to reflect the name change.

Configuration

Most of the changes are handled within the service. However, there are few labels that are managed using the Localization tool using Administration > Request Admin > Localization (left menu). Some of the strings have already been localized for you and are ready for import.

The additional localization import files are available here.
The *Shared: Localization Setup Guide* is available here.

New Request Types, Defined by Policy

Overview

With this release, each Request policy will have a defined request type:

- **Travel:** As used today for pre-approval of trip segments and expected expenses
- **Cash Advance:** As used today for pre-approval of cash advances for trips or other purchases
- **Authorization:** Can be used for pre-approval of other types of purchases (such as office equipment), subscriptions, business meals, etc.

The request type does ***not*** in any way restrict or limit the configuration of the policy; it simply provides a way for clients to define specific-use policies. The client can include or exclude segments, expected expenses, and cash advances using any of the request types. For example:

- The client can use the *Cash Advance* request type to define a cash-advance-only policy. The admin configures the policy without trip segments and expense types. Then, when the user creates a request with this policy, the only option available would be the cash advance.
- The client can use the *Authorization* request type to define a pre-purchase-only policy, for example, for computer equipment, subscriptions, etc. The admin configures the policy without trip segments or cash advance information and includes only purchase-related expense types. Then, when the user creates a request with this policy, the only option available would be expected expenses using the purchase-related expense types.
- Just like today, the admin can use the *Travel* request type and include any or all segments, expected expenses, and cash advances.

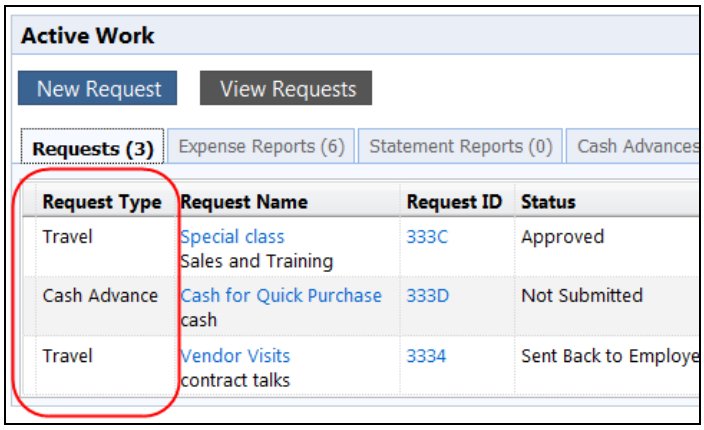
NOTE: As noted above, the three request types available are *Travel*, *Cash Advance*, and *Authorization*. These names are not configurable but, like most labels, the admin can effectively change them using the Localization tool. Refer to the *Shared: Localization Setup Guide* for more information.

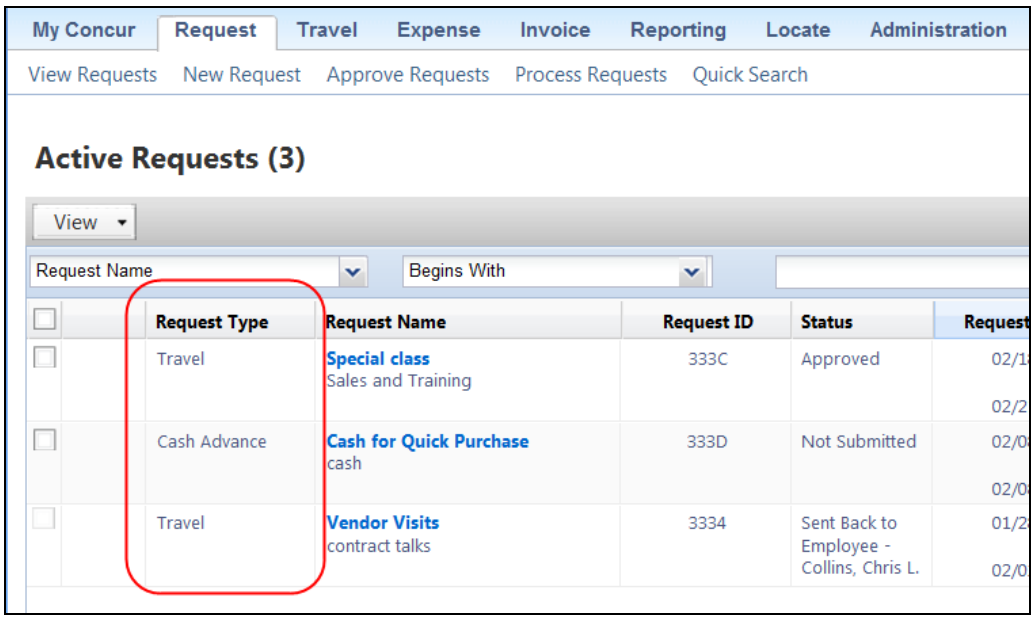
With this release, all existing policies will be assigned the *Travel* request type.

What the User/Approver Sees

Users

If the user has multiple requests with differing types, the new **Request Type** column appears on My Concur and on the various request pages, such as the request list page.





If all requests have the same request type, the **Request Type** column does not appear.

Approvers

The same applies to approvers – if there are multiple requests with differing types in the approval queue, the new **Request Type** column appears.

Other Areas in Request

Note the following:

- **Processor:** The processor can create queries and define the columns that appear (List Settings) using the request type.

  Refer to the *Request: Processor User Guide* for more information.

- **Rules:** The **Request Type Code** field is available for audit rules, workflow rules, and email reminders.

  📖 Refer to the *Request: Audit Rules Setup Guide*, the *Request: Workflow – General Information Setup Guide,* and the *Request: Email Reminders Setup Guide* for more information.

- **Printed reports:** The **Request Type Code** field is available for printed reports.
- **Extract:** The **Request Type Code** field is available for the request extract.

  📖 Refer to the *Standard Request Extract Specification* for more information.

Setting to Control the Cost Object Approver Display

Overview

Currently, when a cost object approver reviews a request, that approver can see the cost objects that belong to all other cost object approvers. With this release, there is a setting that the client can use to control the display of that information.

With this new setting, when the cost object approver opens the request, only the cost objects that apply to that approver are visible. This new setting is not designed to fully hide the other cost object information. It simply filters it out of the display, making it easier for a cost object approver to focus on the items that apply to him/her. In fact, if the cost object approver wants to see the entire request, the approver can use the print feature to see the printed report, which displays all of the detail.

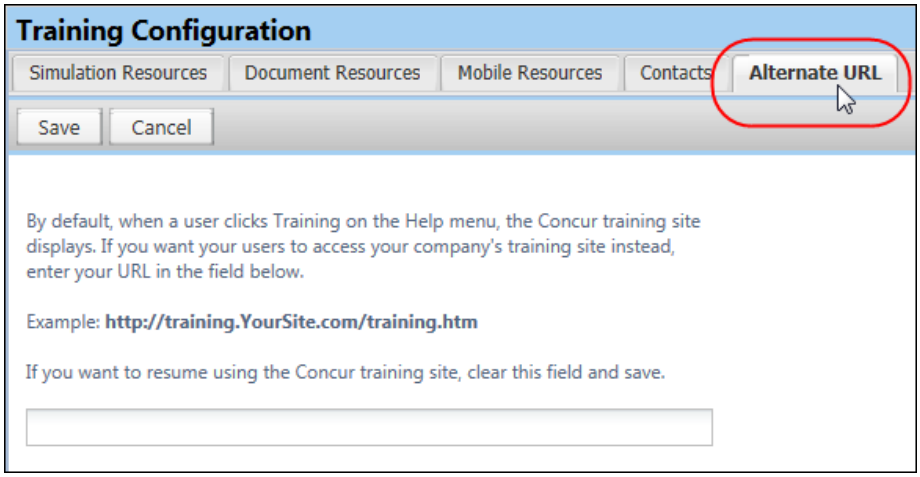
Configuration

If the client is interested in using this setting, the client contacts Concur Client Support for assistance.

Redirect URL Option Now Available for Help > Training Link

Overview

Clients who use the **Help** > **Training** link to access the **Concur Travel and Expense Training Site** page may now instead direct their users to a landing page of their own choice. The feature uses options in the new **Alternate URL** tab of Training Administration.



Once configured, the user clicks **Help** > **Training**. The custom page opens in the language specified in the user's Profile page or the language selected during login.

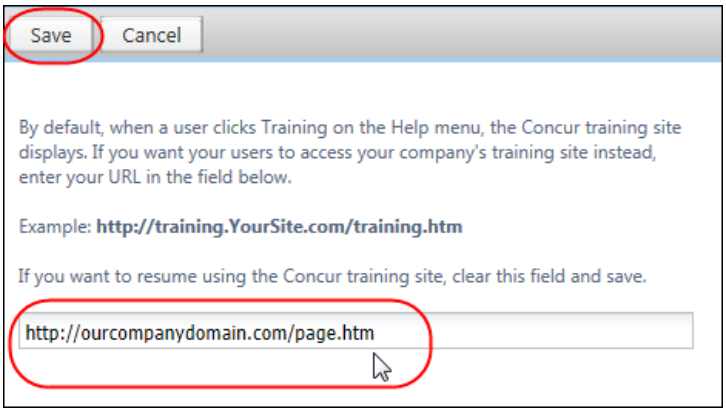
Configuration

To configure this feature, the user must have the Training Administrator role.

1. Click **Administration** > **Request Admin** > **Training Administration** (left menu).

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 link to open when clicked.



4. Click **Save**.

5. **IMPORTANT:** Log out then log back in to have the change take effect, then test the link.

Refer to *Shared: Training Administration Setup Guide* for more information.

New Information in the Standard Request Extract

The following information is available in the Section Header portion of the extract:

- Request expiration date
- Request post approval updated amount
- Is cash advance related
- Request entry budget date

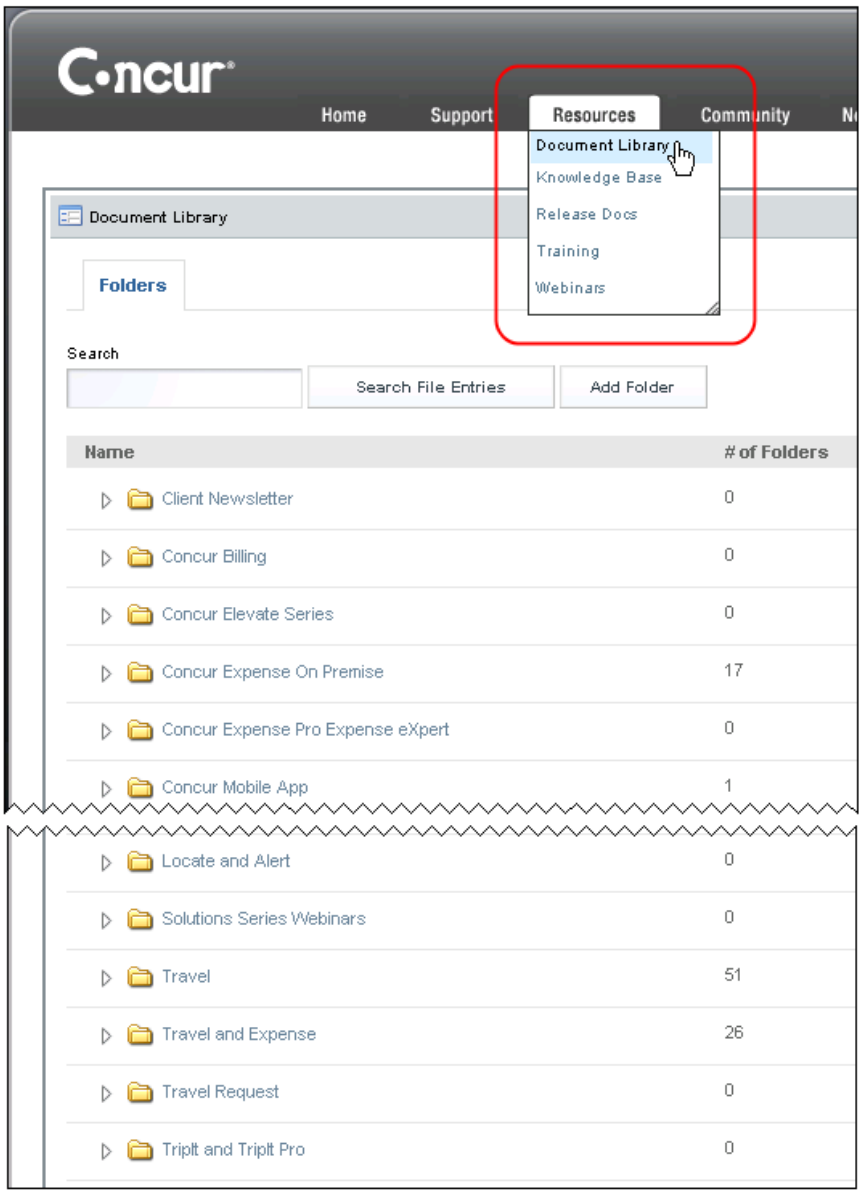
📖 For more information, refer to the *Standard Request Extract Specification*.

Additional Information

Where Do Clients Find Additional Documentation About Request and Other Concur Products?

Concur Client Central > Resources > Document Library

A full set of technical documentation and release notes are available on Concur Client Central at Resources > Document Library.



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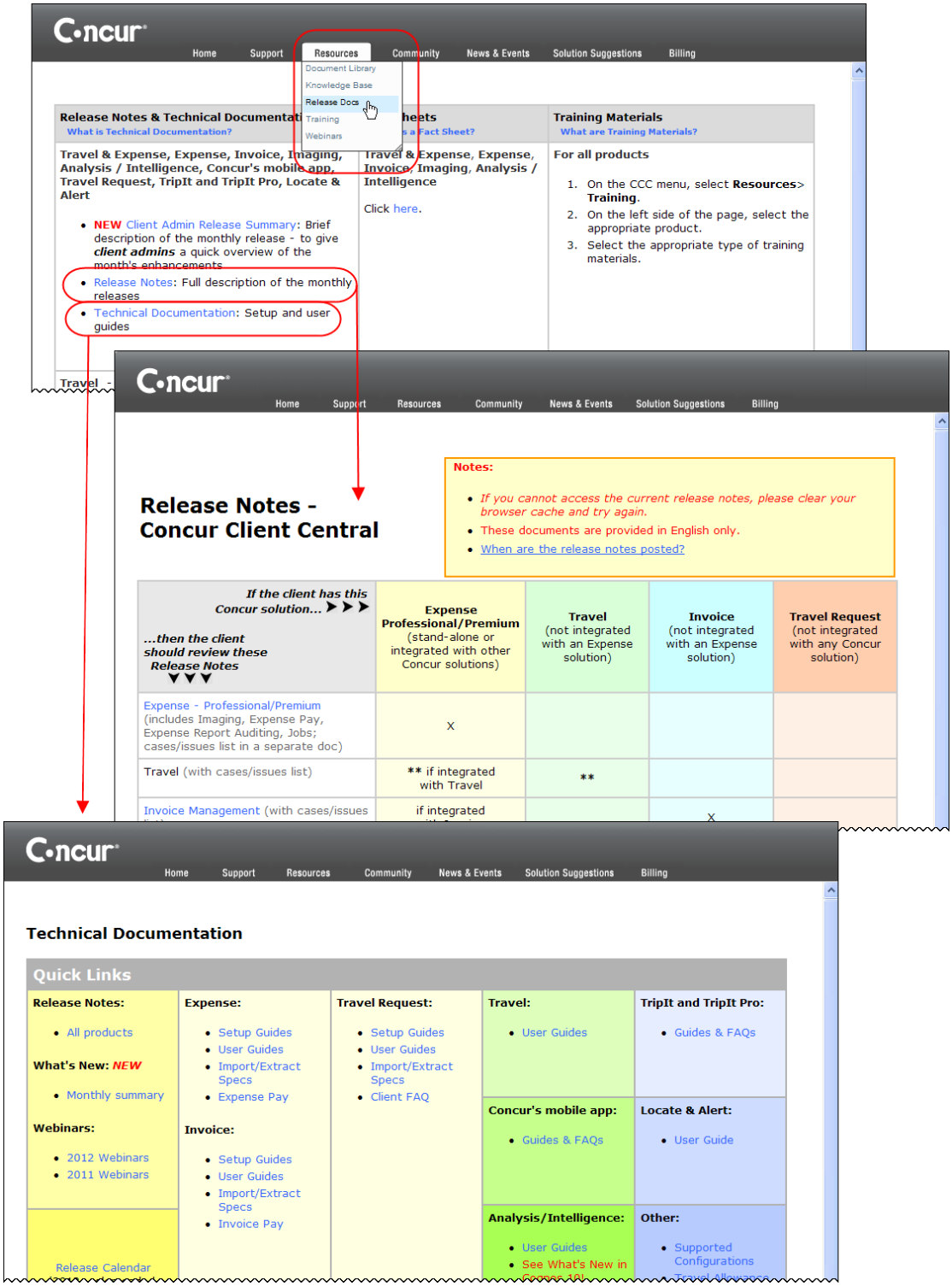
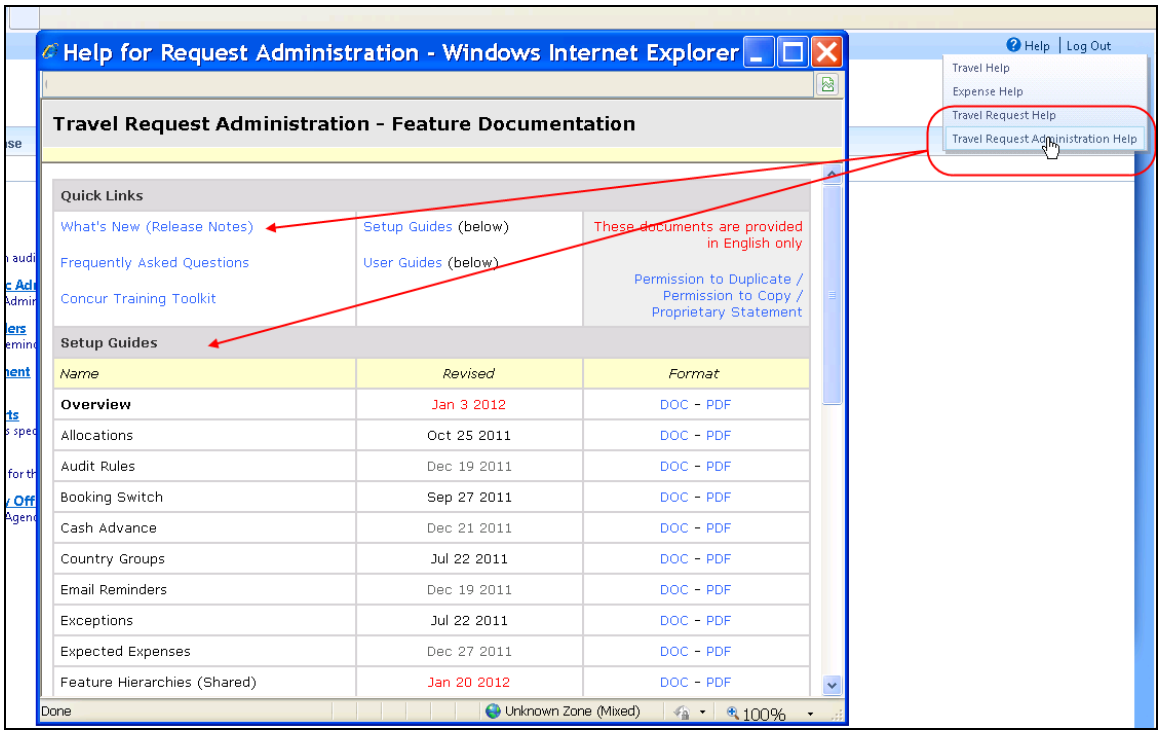


Online Help

Users with the Request Administrator role can also access technical documentation and release notes in online help.



Concur Release Notes **Travel Request**	
Month	**Audience**
March 2013	Client

Contents

Summary

The major features are:

- Attendee summary available
- "Created by Delegate" available in audit rules
- Emergency contact information on the printed report

The *Additional Information* section of these release notes shows where to find:

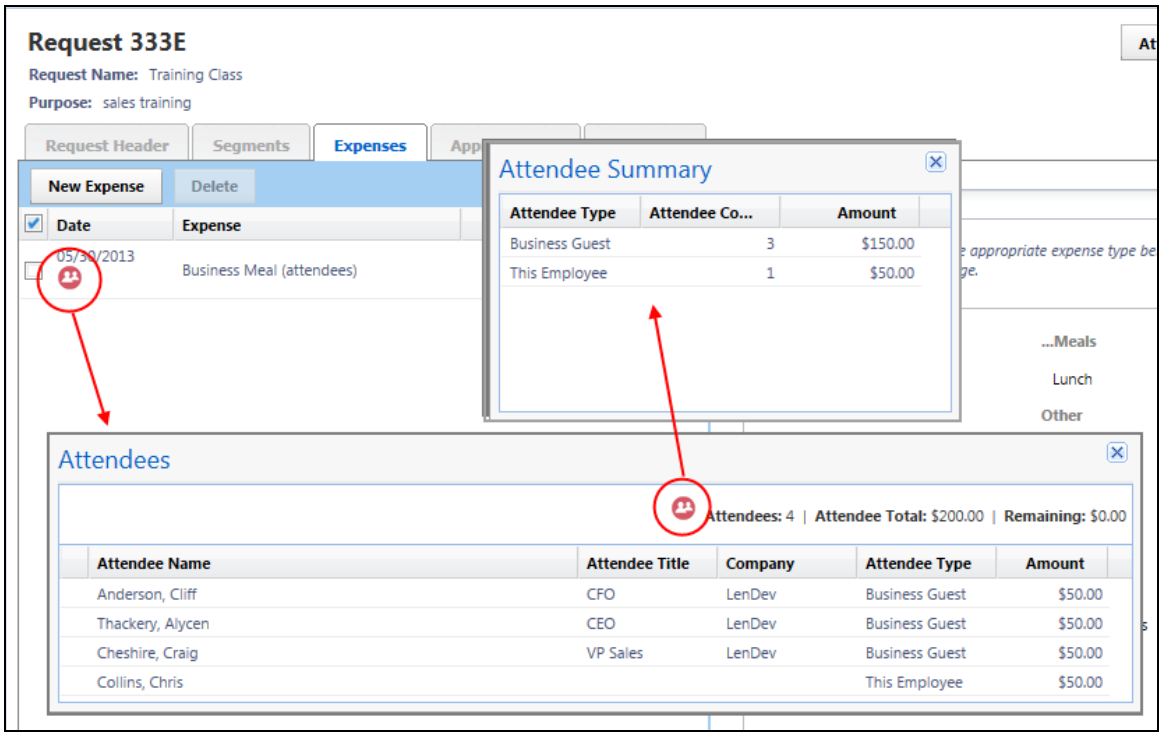
- Technical documentation about Travel Request and other Concur products
- Release Notes about Travel Request and other Concur products

Release Notes

Attendee Summary Available

Overview

When the user hovers the mouse pointer over the attendees icon on the **Expenses** tab, the attendee summary information (names, amounts) appears.



In the summary box, if the user hovers the mouse pointer over the attendees icon, the totals by attendee type appears.

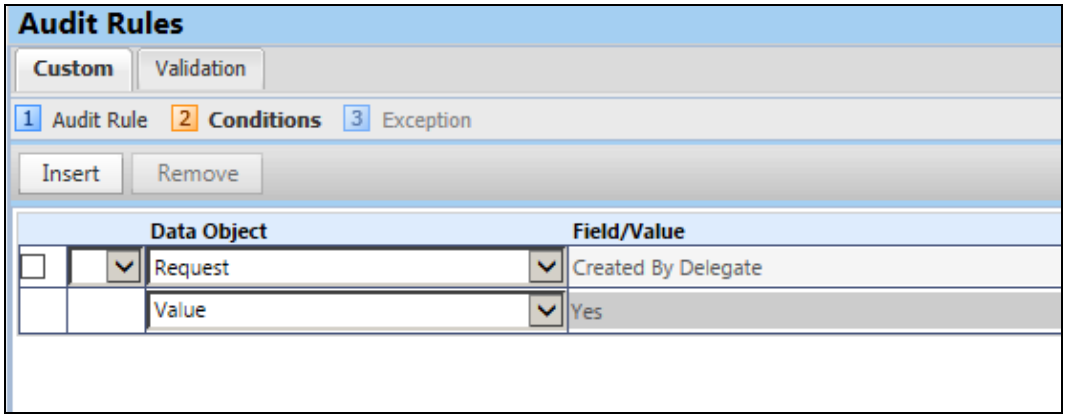
Configuration

There is no configuration; this feature is automatically on.

"Created by Delegate" Available in Audit Rules

Overview

You can now create an audit rule to include whether the request was create by a delegate.

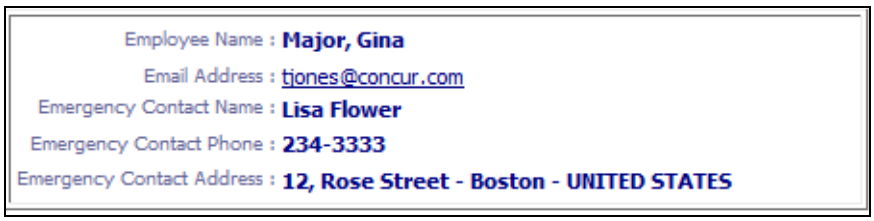


Configuration

There is no configuration; this option is automatically available.

Emergency Contact Information on the Printed Report

You can now include emergency contact information on the printed report.



Configuration

There is no configuration; these fields are automatically available. Add them as desired. They have ***not*** been added to the default report.

Additional Information

Where Do Clients Find Additional Documentation About Travel Request and Other Concur Products?

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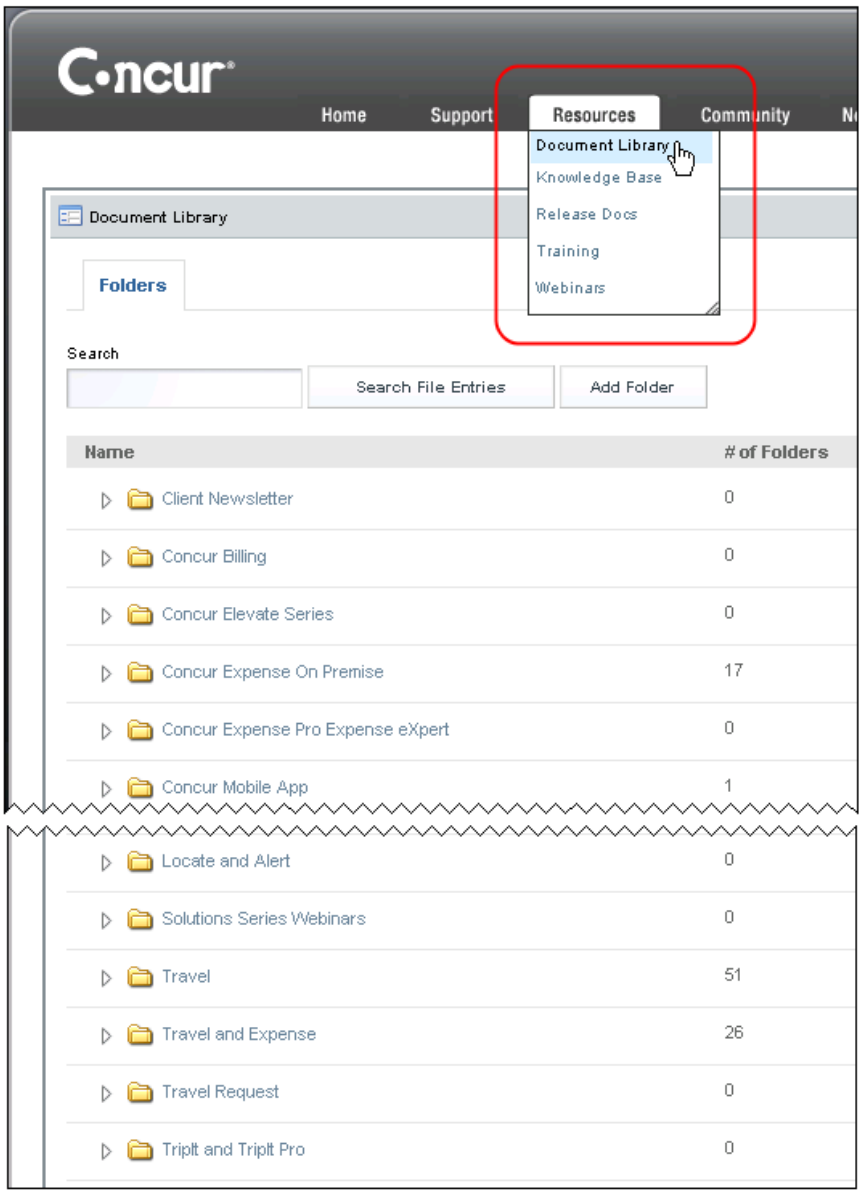

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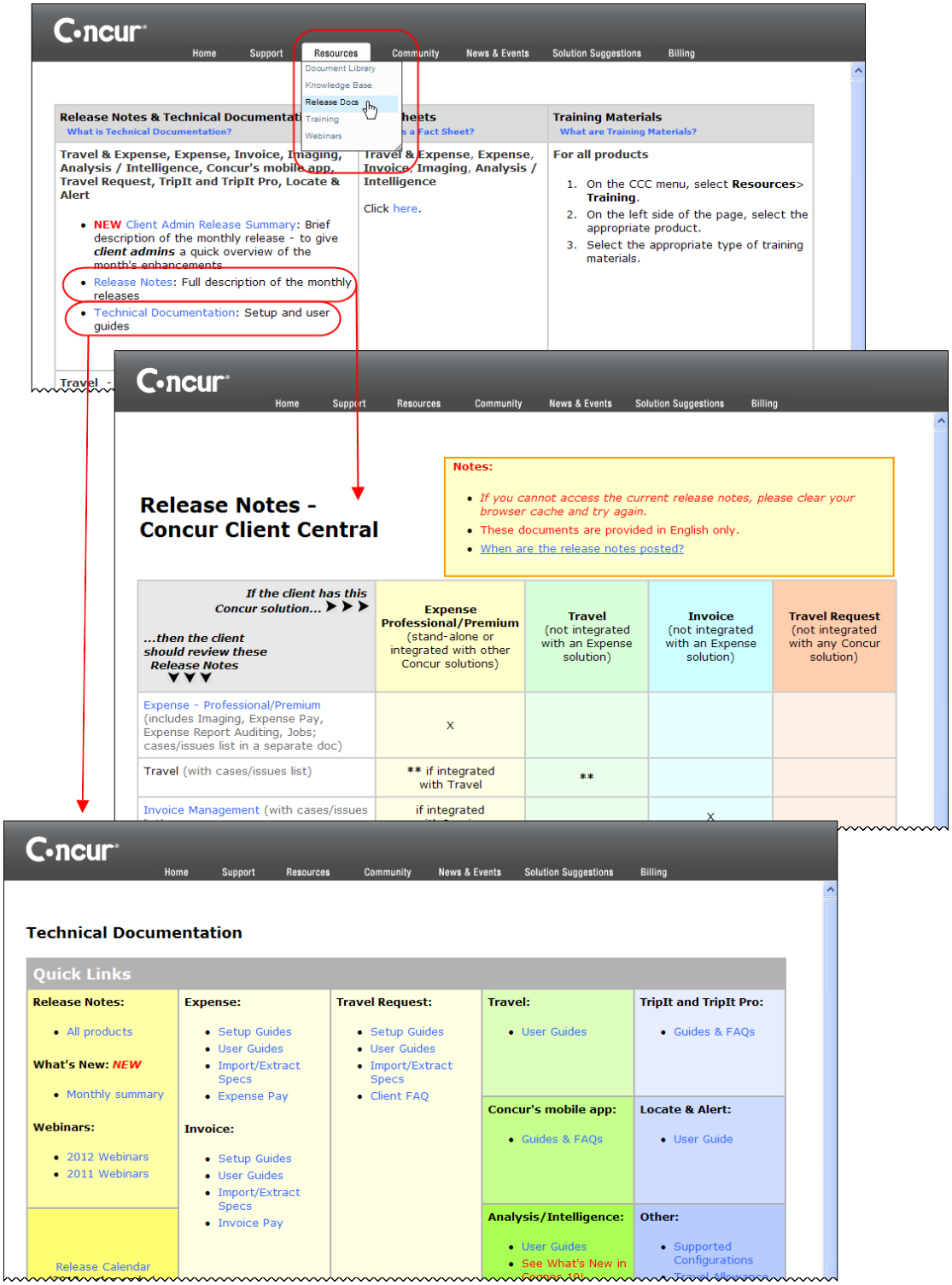

Online Help

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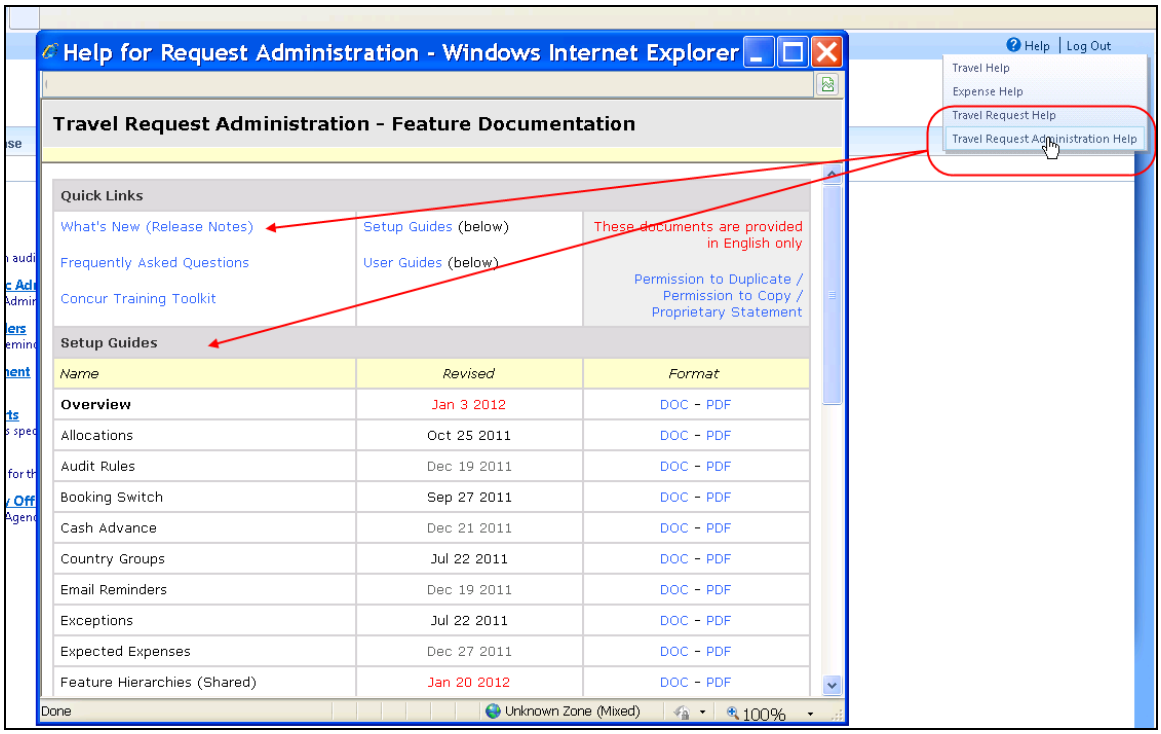


Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
April 2013	Client

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The major features are:

- Auto-submit requests
- Daily limit for cash advances
- Budget Insight: Approver import
- Budget Insight: Audit rules for monitoring budget amounts
- "Is closed" for email reminder rules

The *Additional Information* section of these release notes shows where to find:

- Technical documentation about Request and other Concur products
- Release Notes about Request and other Concur products

Release Notes

Auto-Submit Requests

Overview

Currently, when Concur Request is integrated with Concur Travel, the user starts in Travel and books the trip segments. Concur automatically generates the request and then redirects the user to Request to finish up and submit the request. Unfortunately, many users forget to submit the request when done.

With this release, Concur has provided an auto-submit feature so the user's request is automatically submitted to the request approver at the end of the booking process in Travel. The client can configure the system so that ***all*** requests are automatically submitted or the client can create conditions so that only specific requests are automatically submitted.

If the client specifies no conditions, then requests will be automatically submitted ***if***:

- Concur Request is integrated with Concur Travel.
  – and –
- The Auto Submit feature is activated.
  – and –
- The request is initiated in Concur Travel (and has at least one self-booked segment).
  – and –
- There are no other required fields on the request that are ***not*** populated from Travel data or via copydown from the employee record.
  – and –
- A request approver is already assigned to the user.

This new feature is a good fit for clients who ***do not*** use cash advances, expected expenses, certain required fields, or user-selected approvers.

- **Cash advances, expected expenses, policies:** The request is automatically submitted immediately after the booking process. This means the user will not have to opportunity to request cash advances or expected expenses, select a different policy, or complete optional fields.
- **Required fields:** If there are required fields that are ***not*** populated from Travel data or via copydown from the employee record, the user is redirected to the request to complete the required fields and submit – effectively losing the benefit of the automatic submission.
- **Request approver:** If a request approver is not already assigned to the user, the user is redirected to the request to select an approver and submit – effectively losing the benefit of the automatic submission.

This same auto-submit process applies if the user modifies his/her trip in Travel, for example, if the request was recalled or sent back by the approver or Request Administrator (processor).

Auto-submit is not triggered ***if***:

- The user removes all segments or cancels the trip in Travel – in this case, the request no longer contains at least one self-booked segment
- All Request workflow steps must be skipped – in this case, the user is redirected to Request to manually submit the request (since trip creation is not yet complete in Travel)

Configuration

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

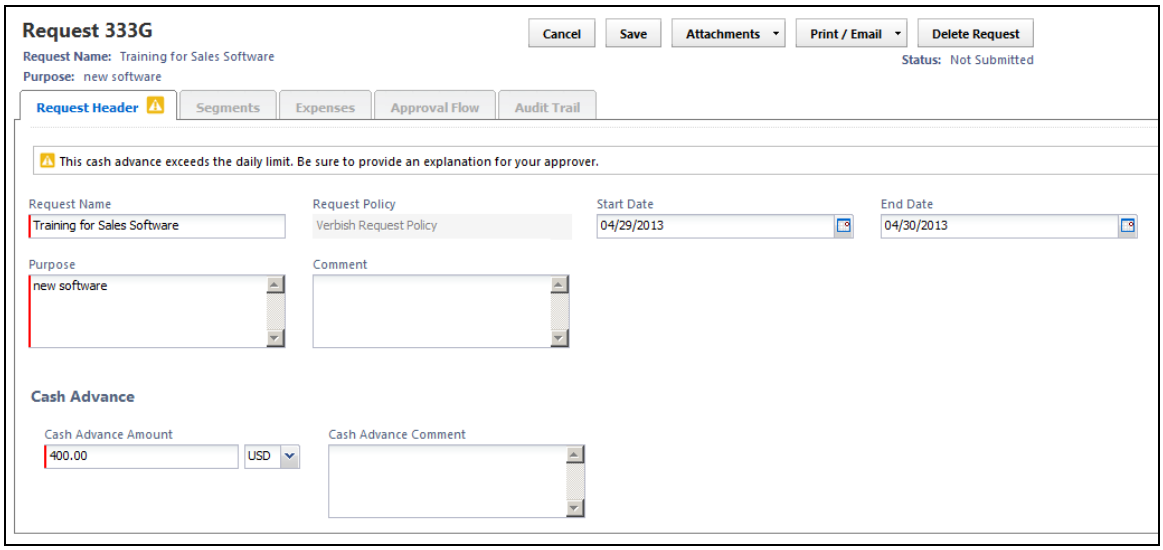
Manage Cash Advance Daily Limits

Overview

Some clients want to manage cash advances as a daily average. For example, if company policy limits cash advances to $100 per day, then a cash advance for a three-day request should not exceed $300.

With this release, a client can set up audit and/or workflow rules to monitor the daily average amount of cash advances associated with requests. Concur uses the starting and ending dates of the request to calculate the number of days – divided by the total cash advance amount requested. It then compares that amount to the daily limit defined in the rule.

Assume that, in this case, the client created an audit rule that generates an exception if the daily cash advance amount exceeds $150. The user created (saved) a request spanning 2 days with a cash advance of $400 – or $200 per day.



In this case, the rule (triggered on Request Save) does not prevent the user from submitting the request but the client-defined exception message encourages the user to provide a reason for the request approver.

Configuration

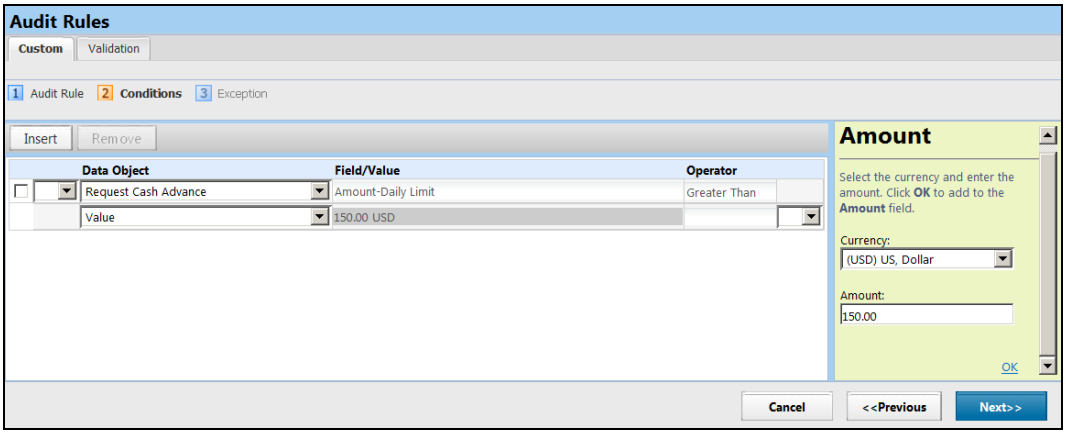
This example is for an audit rule. Be aware that workflow and validation rules are similar.

To create the audit rule:

1. Click **Administration** > **Request Admin** > **Audit Rules** (left menu).

1. Add or edit a rule.

2. On the condition page, enter the following (or something similar).



3. Click **Next**.

4. Select and existing exception or create a new one.

Budget Insight: New Budget Approver Import

Overview

With this release, the budget admin can use a Microsoft Excel spreadsheet to import budget approvers. The import can be used to add, delete, or change budget approvers, currencies, and amounts.

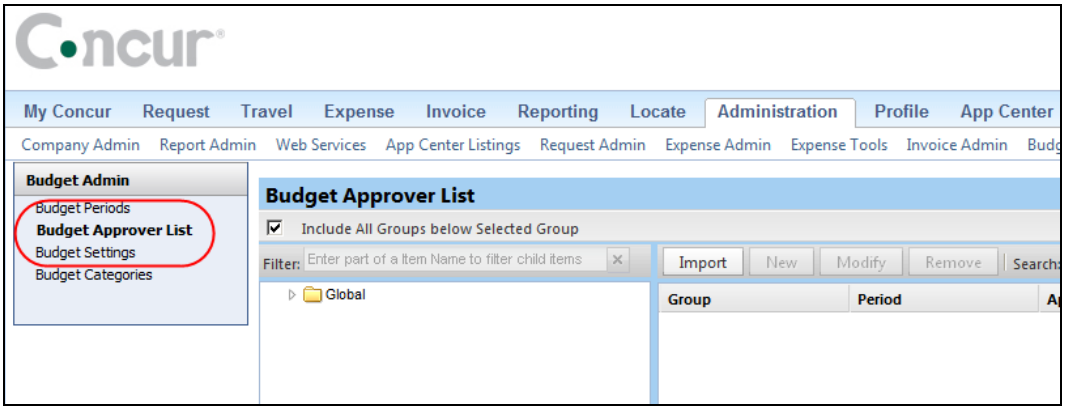
Note the following:

- The budget periods must already be defined in Budget Admin. This import ***cannot*** be used to import the budget periods.
- All users included in this import must already be assigned the Budget Approver role (Company Admin > User Permissions, **Expense** or **Request** tab).
- Only one approver can be imported per budget period, per Budget hierarchy level.
- A budget cannot be deleted once expenses or requests have been assigned by activity in Concur.
- A budget owner can be changed, as well as the initial amount.

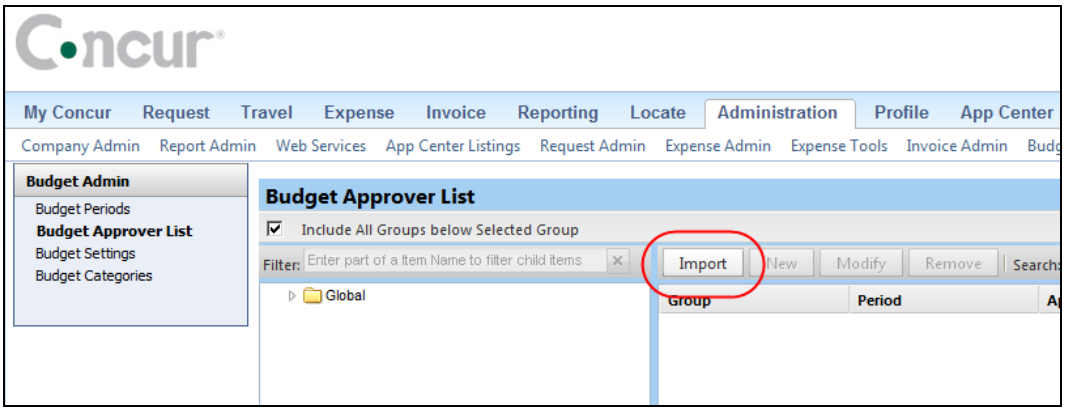
Configuring and Using the Spreadsheet

In this process, the budget admin downloads the spreadsheet, adds the data, and then uploads. To do so, the budget admin will:

1. Click **Administration** > **Budget Admin** > **Budget Approver List** (left menu).

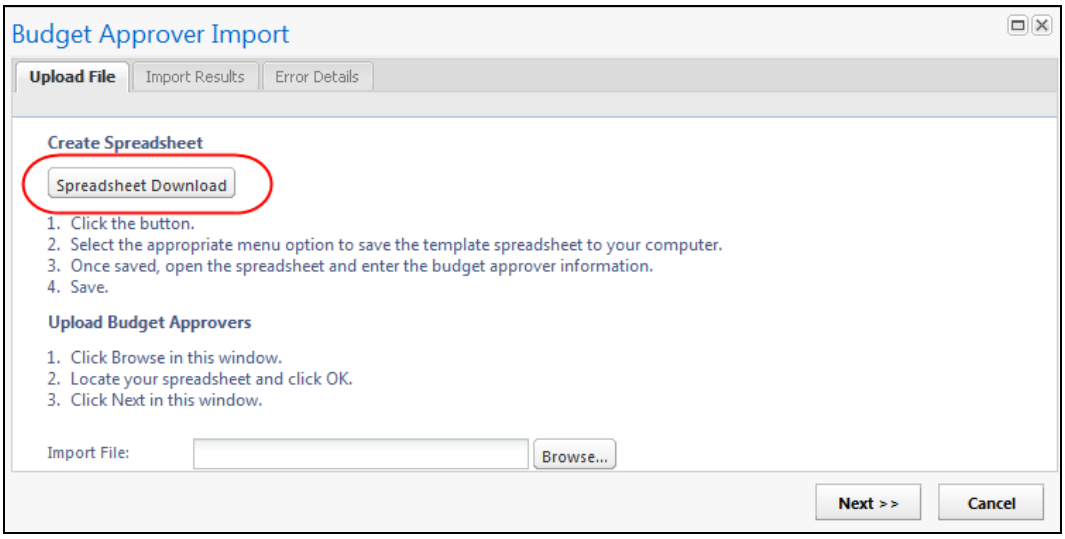


2. Click **Import**.

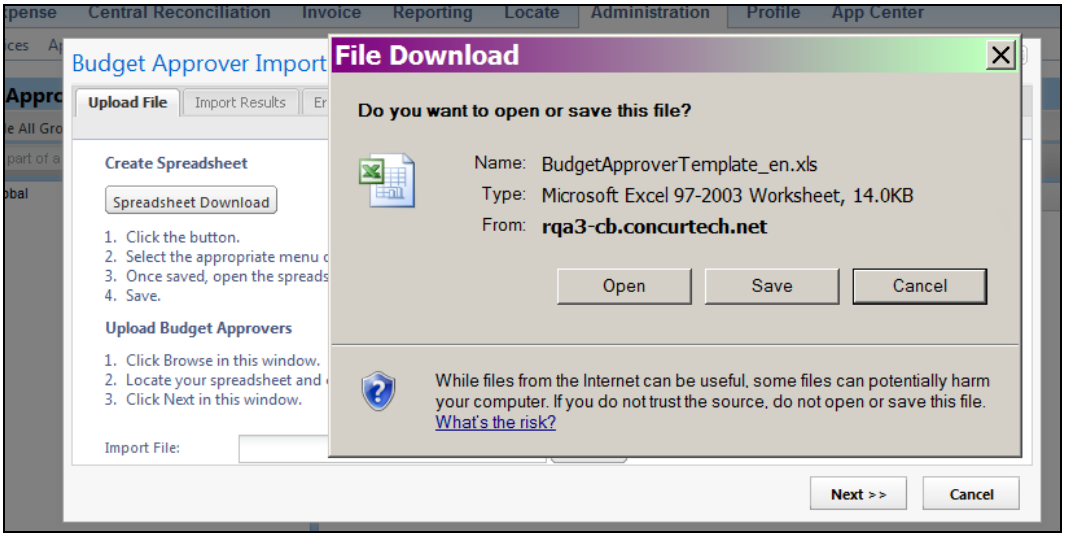


The **Budget Approver Import** window appears.

3. Click **Spreadsheet Download**.

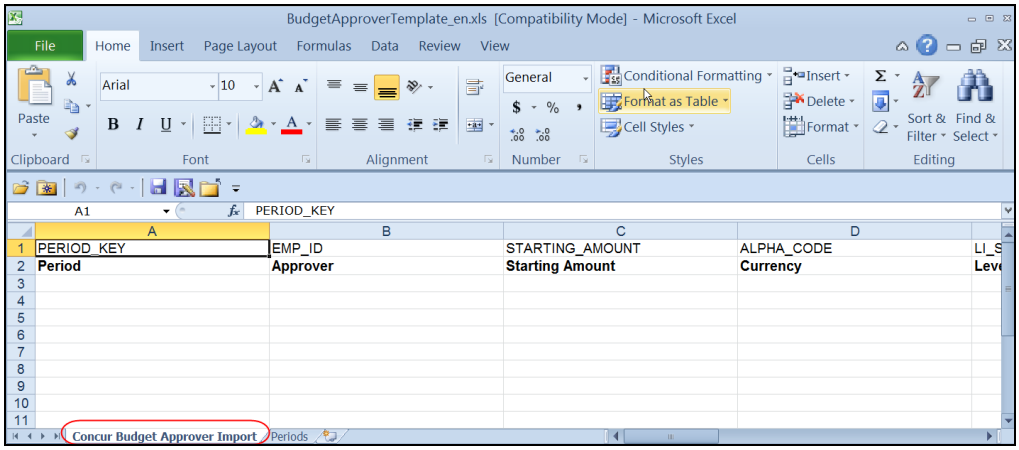


4. Save the spreadsheet locally.

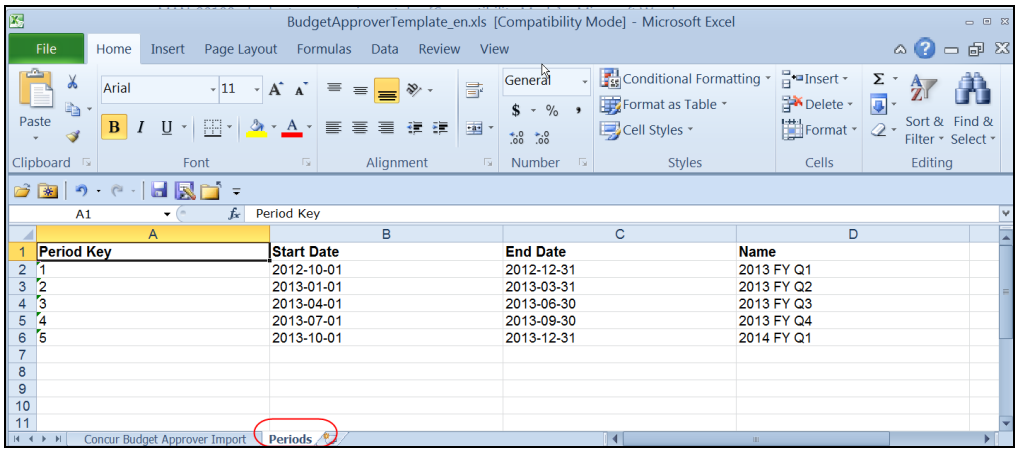


5. Open the spreadsheet.

- The first tab – **Concur Budget Approver Import** – is where the admin will enter the data to be imported.



- The second tab – **Periods** – is a listing of the budget periods defined in the entity.



6. Enter the data on the **Concur Budget Approver Import** tab.

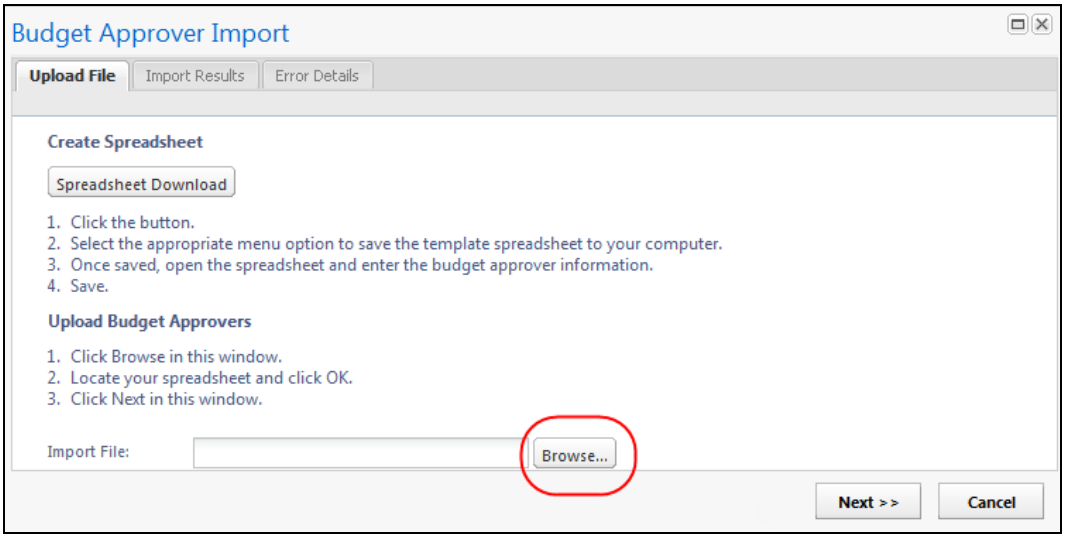
	A	B	C	D	E	F
1	PERIOD_KEY	EMP_ID	STARTING_AMOUNT	ALPHA_CODE	LI_SHORT_CODE	LI_SHORT_CODE
2	**Period**	**Approver**	**Starting Amount**	**Currency**	**Level 01 Code**	**Level 02 Code**
3	1	TerryBrown	10000	USD	D-A	
4	2	TerryBrown	11000	USD	D-A	
5	3	TerryBrown	12000	USD	D-A	
6	4	TerryBrown	13000	USD	D-A	
7	5	TerryBrown	14000	USD	D-A	
8	1	BeaAllen	25000	USD	D-B	
9	2	BeaAllen	25000	USD	D-B	
10	3	BeaAllen	25000	USD	D-B	
11	4	BeaAllen	25000	USD	D-B	
12	5	BeaAllen	25000	USD	D-B	
13	1	BaileyGato	15000	USD	D-C	
14	2	BaileyGato	15500	USD	D-C	
15	3	BaileyGato	16000	USD	D-C	
16	4	BaileyGato	16500	USD	D-C	
17	5	BaileyGato	17000	USD	D-C	
18	1	SandyHale	30000	USD	D-D	
19	2	SandyHale	29000	USD	D-D	
20	3	SandyHale	28000	USD	D-D	
21	4	SandyHale	27000	USD	D-D	
22	5	SandyHale	26000	USD	D-D	
23						

Note the following:

- The periods that you enter on the **Concur Budget Approver Import** tab (column A; **Period**) must match those on the **Periods** tab (column A; **Period Key**). (Consider copying and pasting between tabs.)
- You can enter only one approver per period (column A), per Budget hierarchy level (column E).

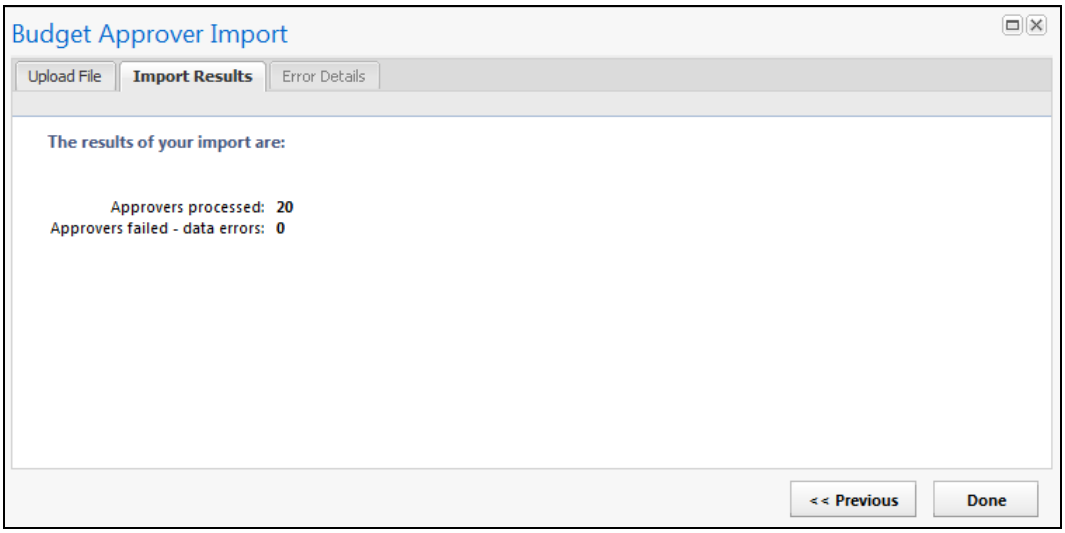
7. Save the spreadsheet.

8. To upload, click **Browse**.



9. Locate your file.

10. Click **Next**. Concur imports the spreadsheet and provides results.

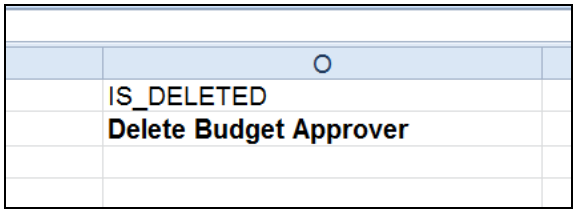


11. If there are data import errors, review the errors, correct the data, and import again.

Deleting Approvers

- ***To delete approvers:***

Enter Y in column O (**Delete Budget Approver** column) for every approver to be deleted. Otherwise, leave this column blank.

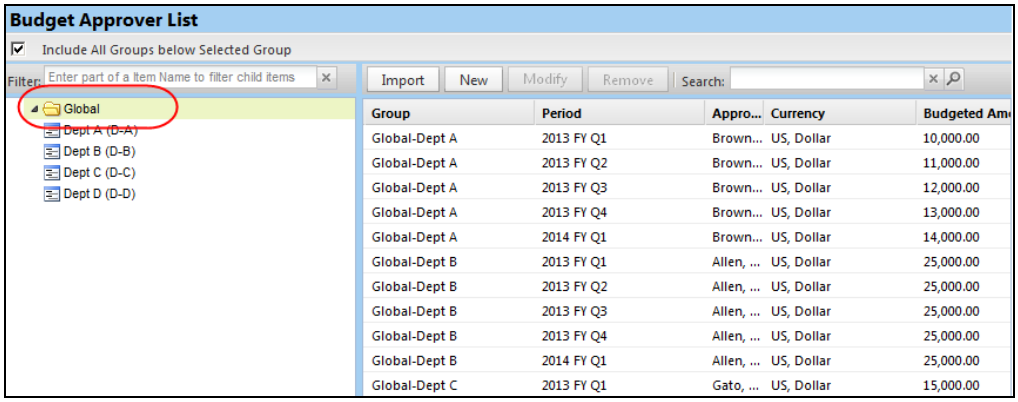


Viewing Approvers

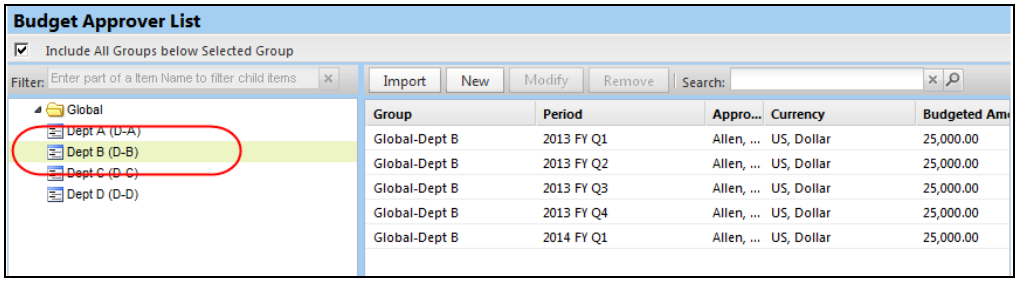
- ***To view approvers:***

1. Click **Administration** > **Budget Admin** > **Budget Approver List** (left menu).

2. On the **Budget Approver List** page:
   - Click **Global** to see all approvers.



- Click a department (hierarchy level) to see the approvers for that level.



Budget Insight: Audit Rules for Monitoring Budget Amounts

Overview

With this release, a new audit rule option is available for use with Budget Insight. The client can create audit rules so budget approvers can better monitor their budget amounts. For example, the admin could create:

- A rule that generates an exception – visible to the budget approver but not the user – indicating that approving the request will result in the budget exceeding a certain percentage of the initial amount, for example, there will be less than 20% of the initial budget amount remaining.
- A rule that generates an exception – visible to both the budget approver and the user – indicating that there are not sufficient budget funds available to approve the request "as is" – thus setting the expectation for the user and allowing the user to make adjustments, if possible.

Calculation

Assume that the admin creates a rule that generates an exception if approving a request will result in the *used* budget amount exceeding 80% of the initial budget amount.

Concur starts with the initial budget amount and the amount of the budget that has already been used.

Initial budget	Budget already used	% Used
$100	$20	20%

Assume that $30 is requested (that is, a $30 request is submitted). Concur adds the requested amount to the amount already used.

Initial budget	Budget already used	PLUS new requested amount	EQUALS budget used if approved	% Used
$100	$20	$30	$50	50%

The rule is not triggered since the percentage used is still under 80%.

Now assume that the $30 request was approved and that there is another request for $40.

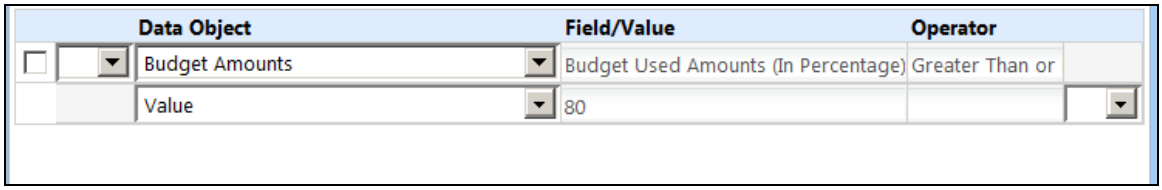
Initial budget	Budget already used	PLUS new requested amount	EQUALS budget used if approved	% Used
$100	$50	$40	$90	90%

Since the percentage used (if approved) will exceed 90%, the rule is triggered and the expectation message displays.

The sample shown above is pretty simple. Be aware that this rule can be used to monitor ranges as well. For example, the admin could create a rule that generates an exception for a percentage between 75 and 99% and a second rule that generates an exception for 100% or over.

Configuration

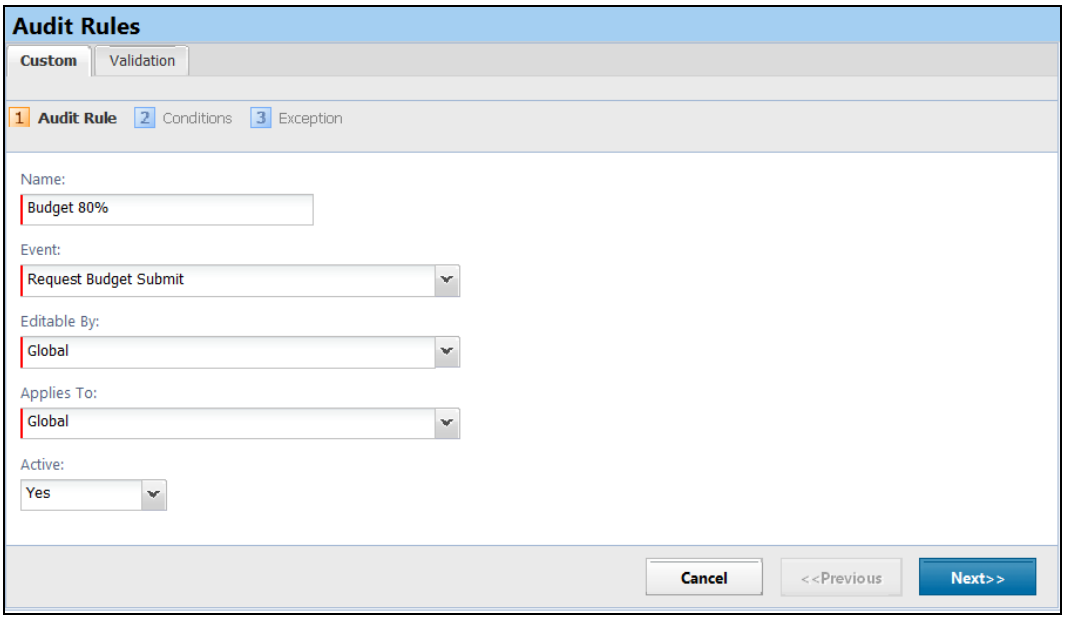
When creating a rule, the admin selects the new *Request Budget Submit* event and the new *Budget Amounts* data object. The admin defines the percentage (for example, 80).



Like other audit rules, the admin defines who sees the exception (the user, approver, and/or processor) and selects an existing exception message or, more likely, creates a new exception message.

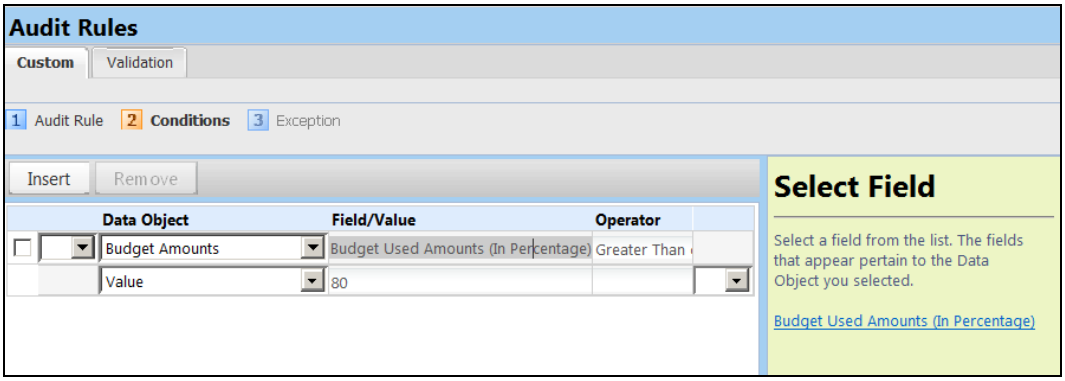
To create the audit rule:

1. Click **Administration** > **Request Admin** > **Audit Rules** (left menu).
2. On the **Custom** tab, click **New**.
3. On the 1 **Audit Rule** step:



- From the **Event** list, select *Request Budget Submit*.
- Complete all other fields as usual.
- Click **Next**.

4. On the 2 **Conditions** step:



- From the **Data Object** list, select *Budget Amounts*.
- From the **Field/Value** list, select *Budget Used Amounts (In Percentage)*.
- Select the desired operator.
- In the **Field/Value** field, enter the percentage, indicating the amount already spent. For example, 80 is 80% of the initial budget amount.

5. Click **Next**.

6. On the 3 **Exception** step, as usual:
   - Define the exception visibility – who will see the exception message.
   - Select an existing exception message or create a new one.

7. Click **Done**.

"Is Closed" Option for Email Reminder Rules

Overview

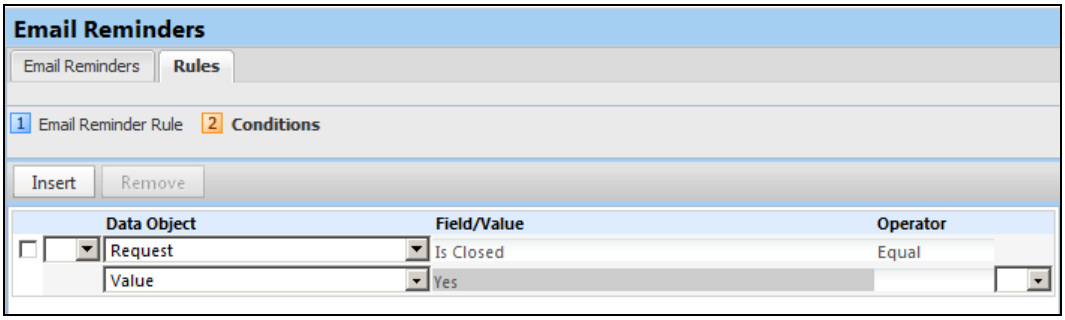
The *Is Closed* option is now available when creating email reminder rules.

Configuration

To create a rule:

1. Click **Administration** > **Request Admin** > **Email Reminders** (left menu).

2. On the **Rules** tab, create a new rule and include this condition.



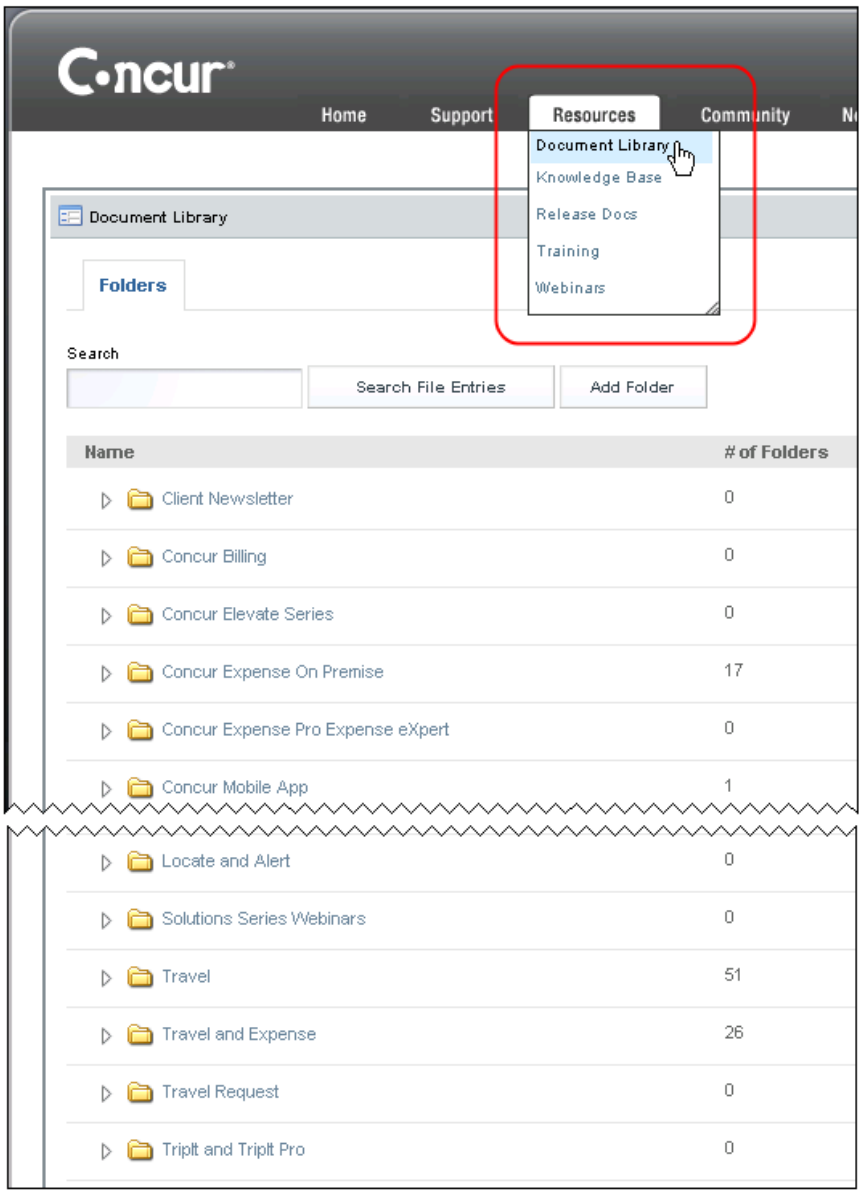
3. Click **Done**.

Additional Information

Where Do Clients Find Additional Documentation About Travel Request and Other Concur Products?

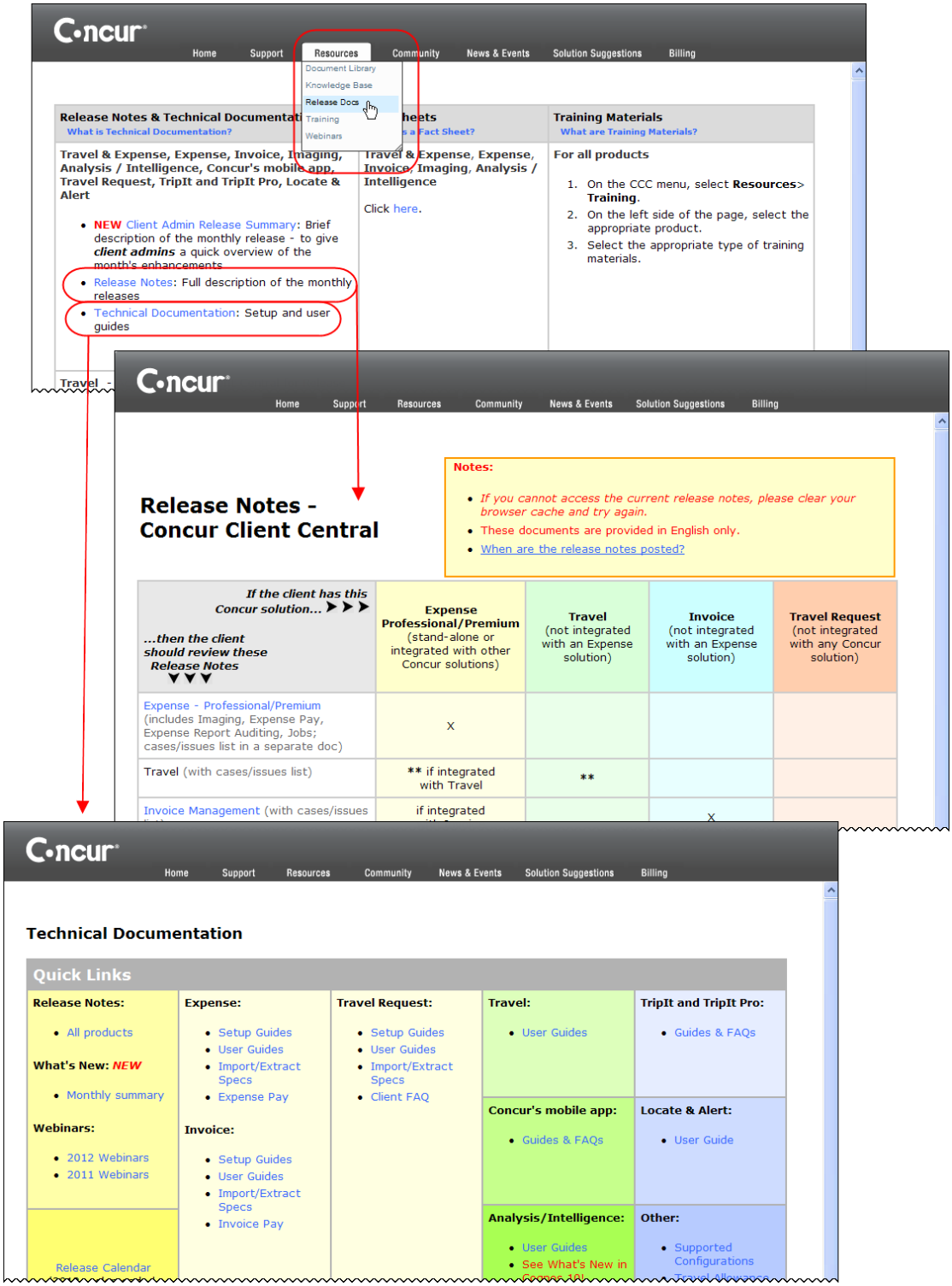
Concur Client Central > Resources > Document Library

A full set of technical documentation and release notes are available on Concur Client Central at Resources > Document Library.



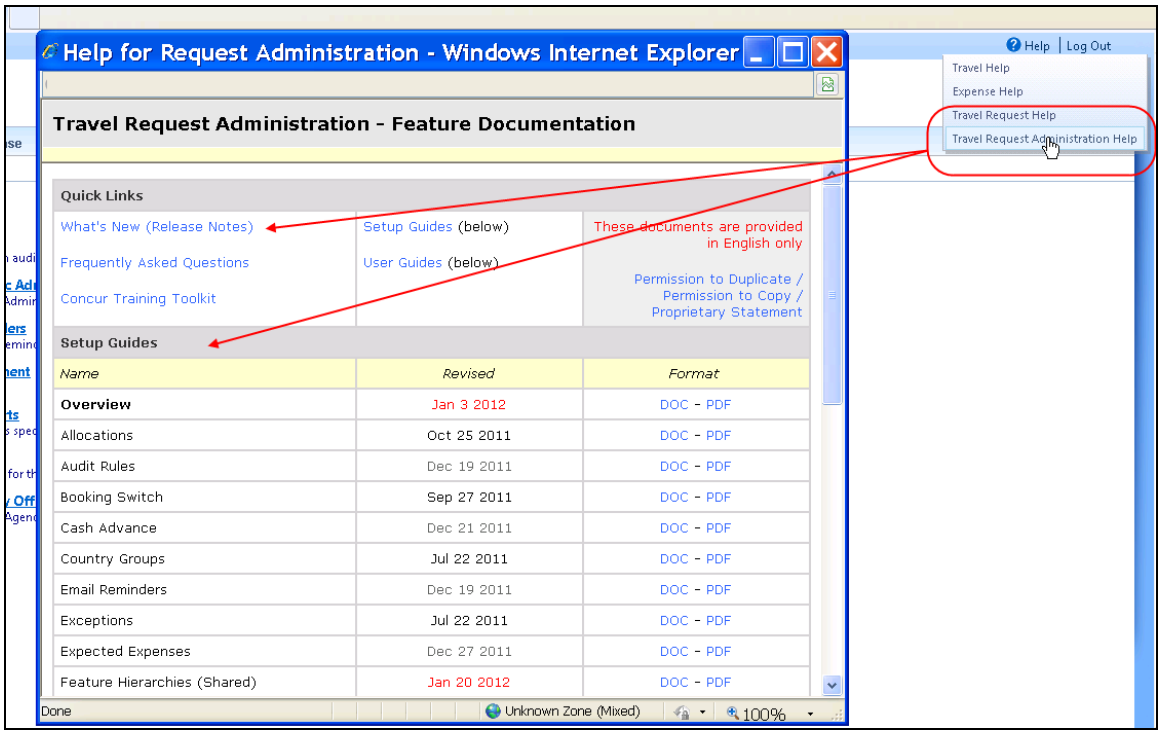
Concur Client Central > Resources > Release Documentation

A full set of Concur technical documentation and release notes are available on Concur Client Central at Resources > Release Documentation. Then, select **Release Notes** or **Technical Documentation**.



Online Help

Users with the Travel Request Administrator role can also access technical documentation and release notes in online help.



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
May 2013 Initial post: Thursday, May 16, 2013 4:15 PM PDT	Client

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The major features are:

- Event management
- Rule enhancement

The *Additional Information* section of these release notes shows where to find:

- Technical documentation about Request and other Concur products
- Release Notes about Request and other Concur products

Release Notes

Event Requests

Overview

Assume that an assistant works for several employees and all of those employees will be attending the same conference. Prior to this release, the assistant would have to create virtually the same request over and over – one for each of the employees.

With the new Event Request feature, the assistant creates one "master" request that contains the names of the employees and all of the common information such as flight, hotel, conference fees, etc. Then – with one click – the assistant creates a copy for each employee and sends each employee a notification. The employees then use their own copies as a starting point, add any additional information, and submit their request.

⚠ **IMPORTANT:** Currently, this feature applies ***only*** to agency-booked requests, which are the requests initiated in Concur Request. Self-booked requests, which are initiated in Concur Travel, cannot use this feature.

New Role – Request Event Manager

In order to use the new feature, the assistant described above ***must have these two roles***:

- **Request Event Manager:** This role allows the user to create and manage event requests.
  – and –
- **Request Proxy Logon:** This role provides access to the employees who will be included on the event request.

NOTE: When assigning the Request Proxy Logon role, the user/permission admin selects one or more groups for which the proxy can manage requests. When using the Event Management feature, all participants on the event request must belong to the group(s) assigned to the proxy.

Terminology

These terms will be used for this feature:

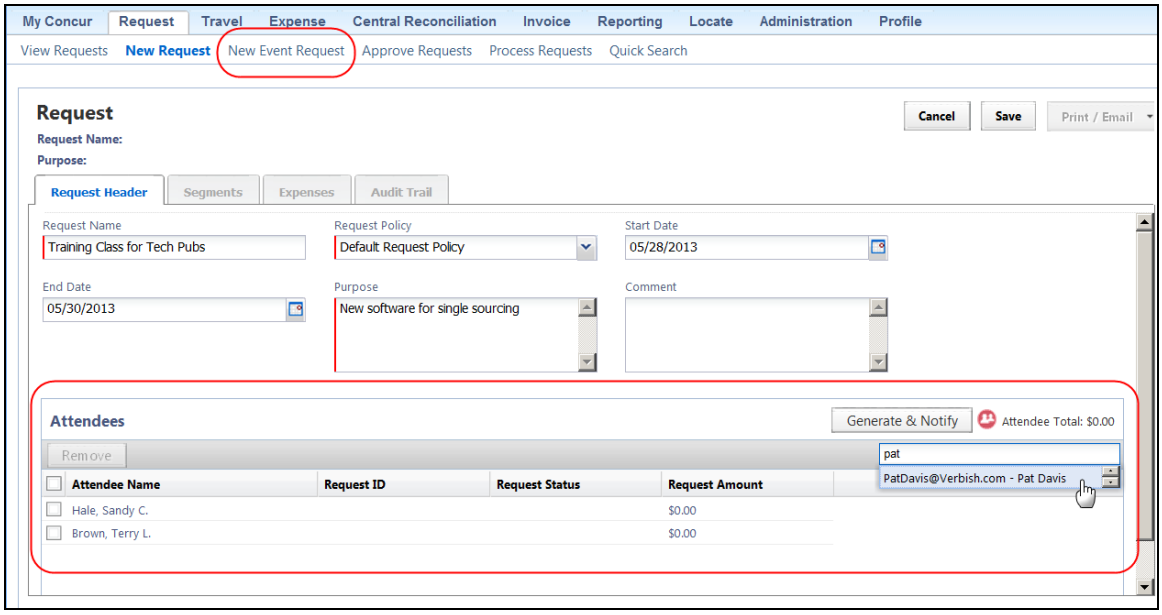
- **Event manager:** The person with the Request Event Manager role, who creates and manages the "master" event request
- **Event attendee:** The employees who are participants in the event and are listed on the "master" event request

- **Main event request:** The "master" event request that is created by the event manager and contains the information common to all event attendees
- **Attendee event request:** The event attendee's copy of the request, which contains the common information but can be edited to include the information specific to that event attendee

What the User Sees

Event Manager

The event manager clicks the new **Request** > **New Event Request** menu option. The request header page appears as usual.



Then:

- On the top portion of the **Request Header** tab, the event manager enters the name, purpose, dates, etc.
- On the bottom portion of the **Request Header** tab, the event manager searches for and selects all event attendees.
- The event manager uses the **Segments** tab and the **Expenses** tab (as applicable) to create all of the request items that are common to all event attendees.
- The event manager returns to the **Request Header** tab and clicks **Generate & Notify**. Concur Request creates a copy for each event attendee, which is available in each event attendee's request list. Request also notifies the event attendees.

Note the following about the process:

- The main event request can contain segments, expected expenses (with or without attendees), allocations, and attachments.

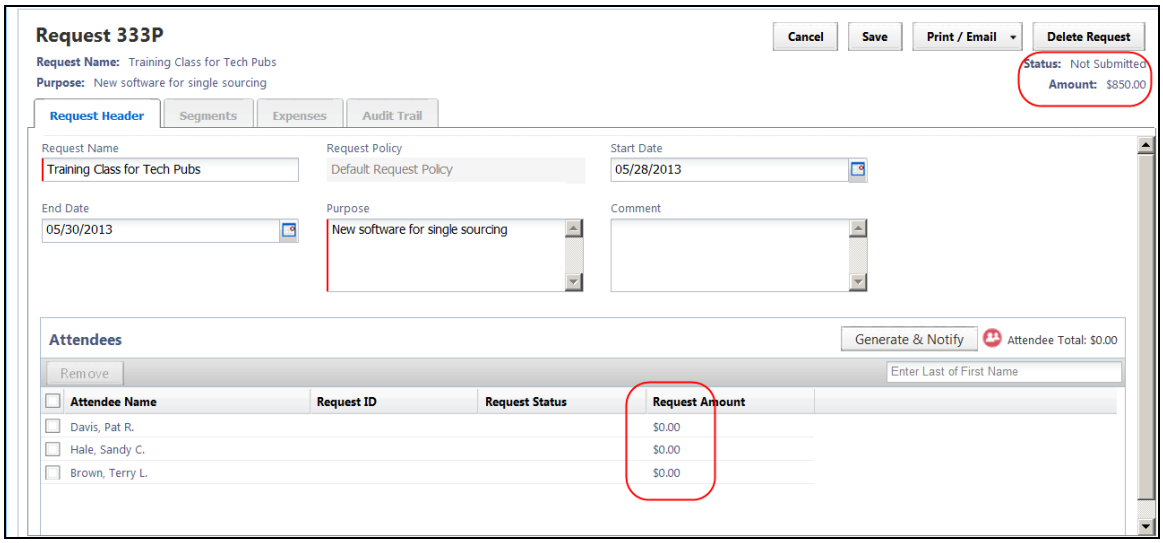
NOTE: Note that items attached at the main event request level are ***not*** copied to the attendee event requests.

- Cash advances cannot be part of the main event request.
- Only employees who are also Request users can be event attendees.
- The event manager can complete these actions for the main event request:

- The event manager can add himself/herself as an event attendee if he/she is attending the same event.
- Each attendee must use the same policy as the one used for the event request. If the event manager selects an event attendee who – for any reason – cannot use the policy, then while generating the attendee event request, the event manager will receive a warning that it will not be possible to generate the attendee event request.

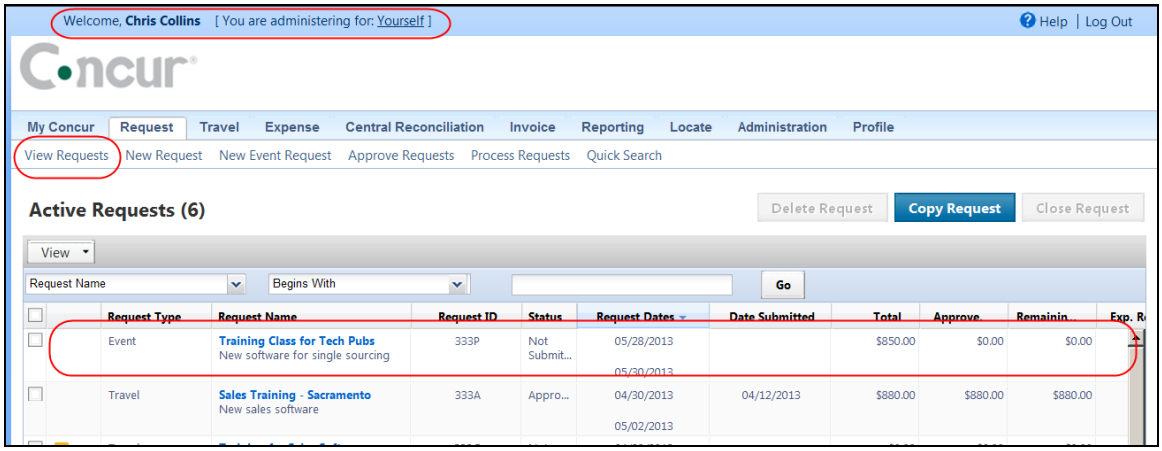
AMOUNTS

When the event manager creates segments and/or expected expenses, the total appears (as usual) in the upper-right corner but the attendee amounts still appear as zero as long as the attendee event requests have not been generated.

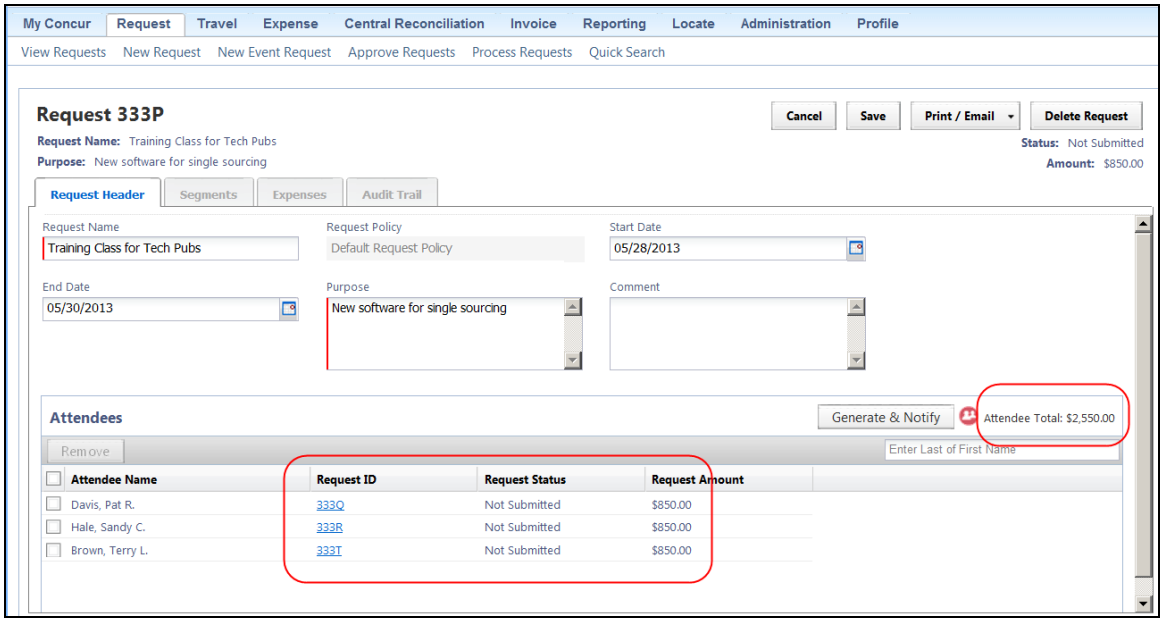


RE-OPENING THE REQUEST

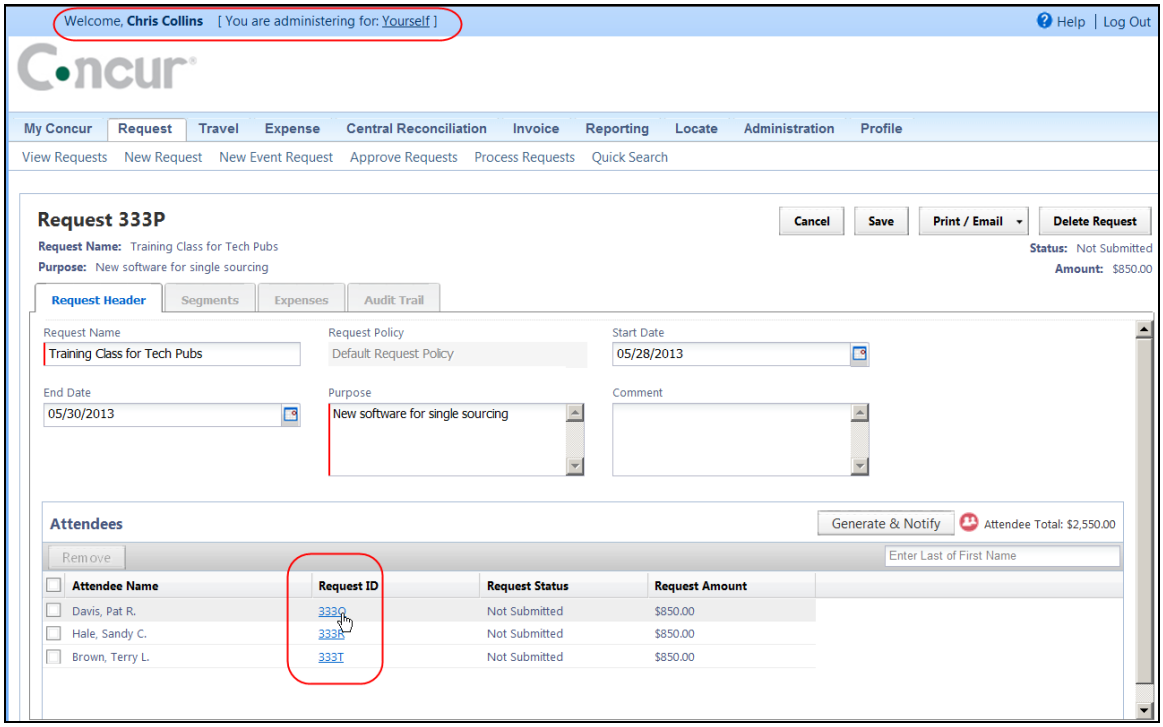
Once the event manager clicks **Generate & Notify**, the main event request appears in the event manager's list of requests.



If the event manager (in this case, Chris Collins) re-opens the event request, the event attendee amounts appear, along with the unique Request ID and request status for each attendee event request.

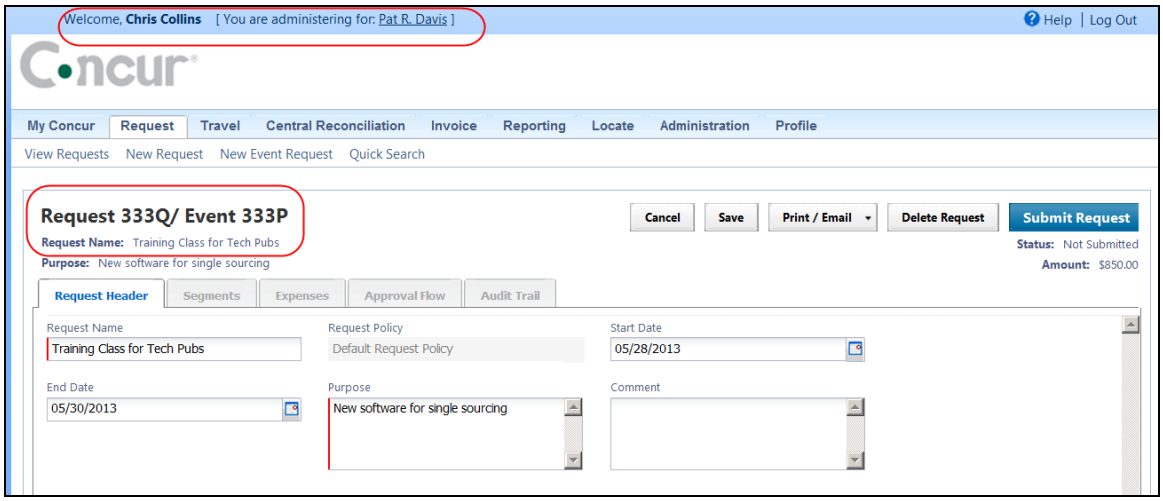


The event manager (Chris Collins) can open an attendee request by clicking the request ID (in this case, the request for Pat Davis).



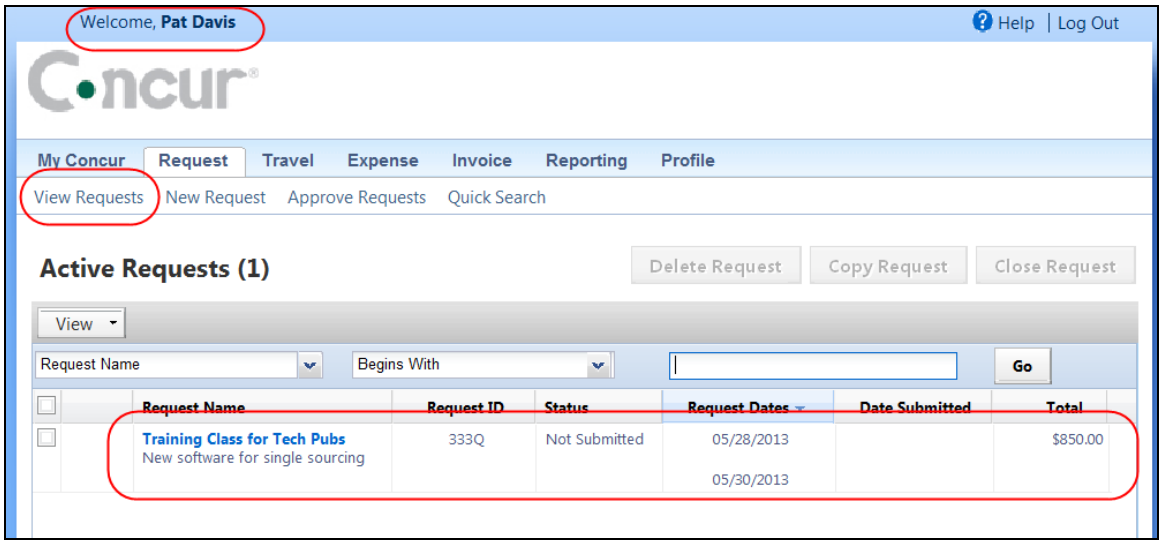
When the event manager opens the attendee event request:

- Chris Collins is now administering for Pat Davis.
- The request shows the two request IDs – one for the attendee event request and one for the main event request.
- The names of the other event attendees do not appear on the individual attendee event requests.
- The event manager can access the various tabs, modify the request, and, in fact, submit the event request on behalf of the event attendee. (More information is available in *Other Actions* on the following pages.)



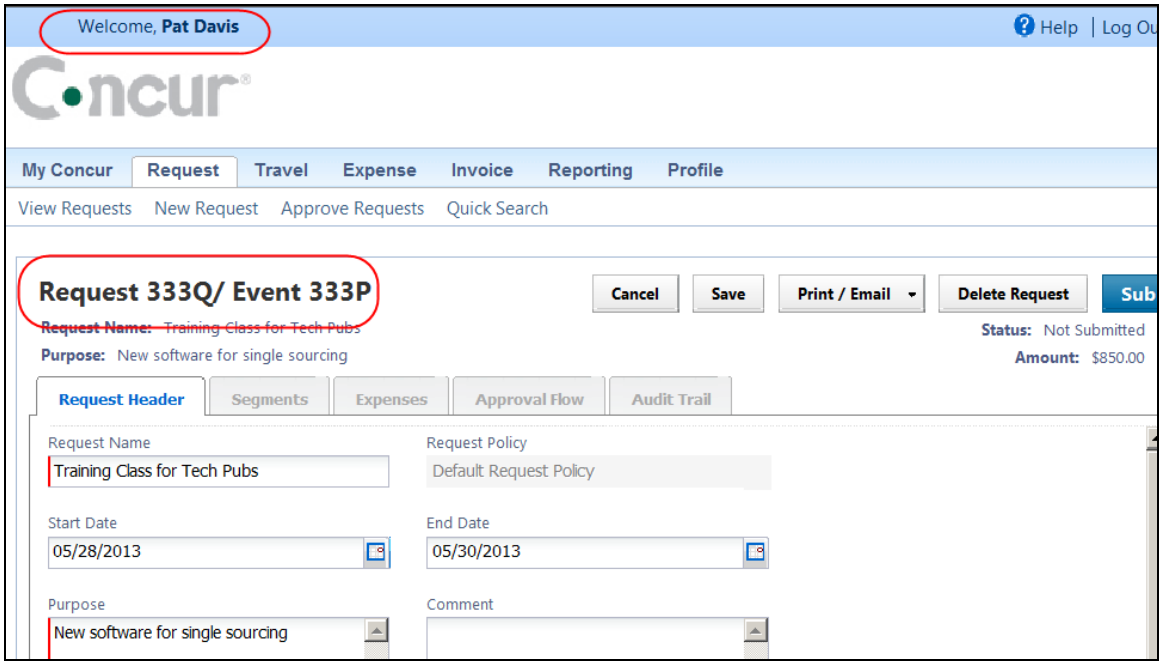
Event Attendee

Once the event manager clicks **Generate & Notify**, the attendee event request appears in the request list of the event attendee (in this case, Pat Davis).



When the event attendee opens the attendee event request:

- The request shows the two request IDs – one for the attendee event request and one for the main event request.
- The names of the other event attendees do not appear on the individual attendee event requests.
- The event attendee can access the various tabs, modify, and submit the event request. (More information is available in *Other Actions* on the following pages.)



Workflow

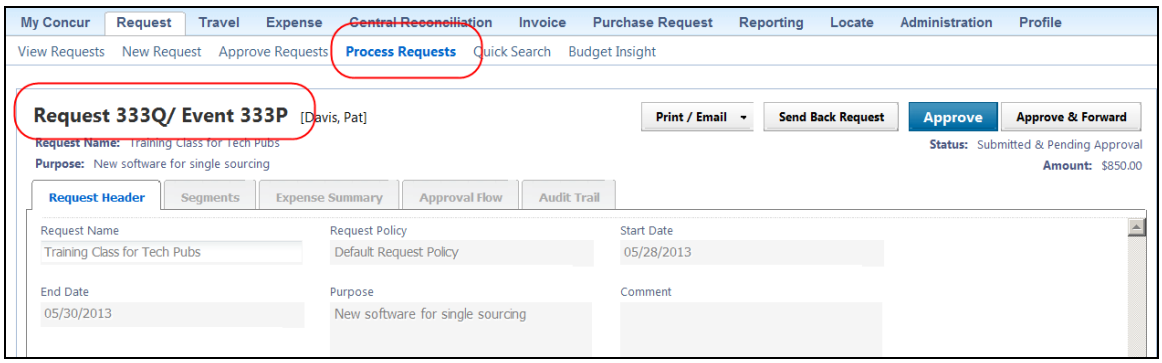
When each event attendee submits his/her request, it follows the normal workflow for that user, for example, goes to that user's approver, etc. The main event request is never submitted and, hence, does not have a workflow.

Delegate

If the event attendee has a delegate, that delegate has the same permissions to the event request as any other request.

Processor

When the processor opens an attendee event request, both IDs appear – one for the attendee event request and one for the main event request.



Other Event Request Actions

Add an attendee: The event manager can modify the event request to add more event attendees. If so, when the event manager clicks **Generate & Notify**:

- An attendee event request is generated ***only*** for each newly added attendee. New attendee event requests are ***not*** regenerated for existing event attendees nor are the existing attendee event requests updated in any way.
- A notification is sent ***only*** for each newly added attendee; existing event attendees are ***not*** notified.

Remove an attendee: The event manager can remove an attendee either before the attendee event request is generated or if there is no condition preventing the attendee event request from being deleted. If there is a reason that an attendee event request cannot be deleted, the event manager will be notified.

Delete a main event request: The event manager can delete the main event request either before the attendee event requests are generated or if the event manager can successfully remove all of the event attendees.

Copy a request:

- The event manager can use the copy function to copy an existing main event request.
- The attendee can copy the attendee event request but all information related to the main event request is lost.

Other modifications:

- **Event manager:** As noted above, existing attendees are not affected or notified if changes are made to the main event request. If the event manager wants to make changes that affect the attendees, then the event manager removes the attendees, makes the changes, and adds the attendees again. Now the attendees are considered to be new – when the event manager clicks **Generate & Notify**, the attendee event requests are generated and notifications are sent.
- **Event attendee:** Individual event attendees can make any changes allowed by their policies and approvers. Changes made by the event attendees do not affect the main event request.

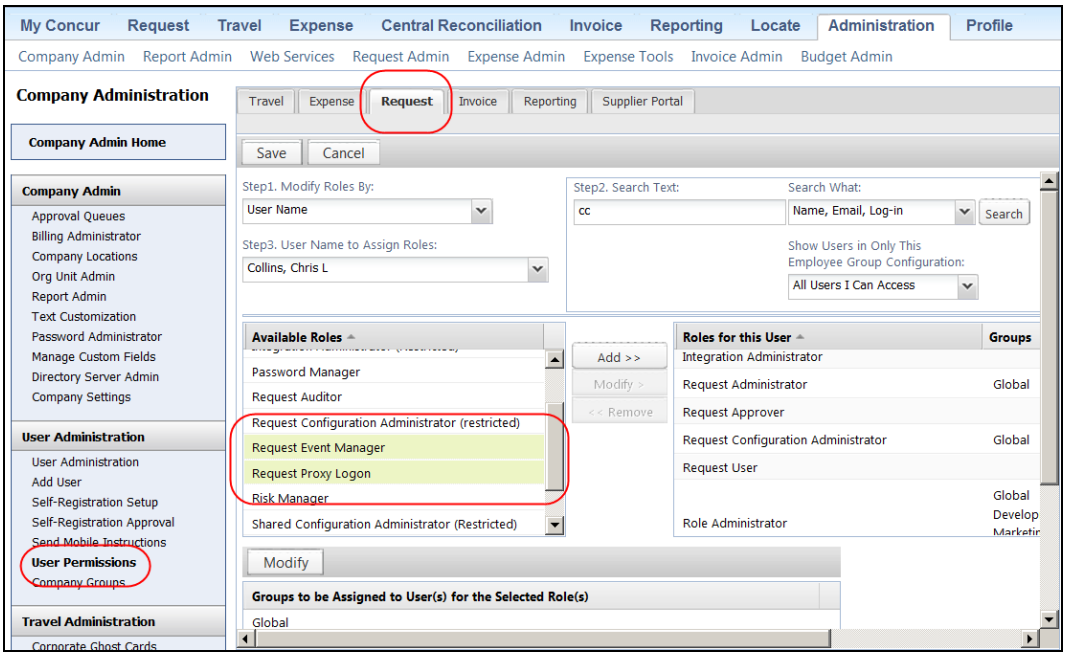
Configuration

The only configuration required is to assign the proper roles.

Assign the Roles

To assign the roles:

1. Click Administration > Company Admin > User Permissions (left menu).



2. Locate the desired user(s) and assign the roles as usual.

NOTE: You have to select a group for the Request Proxy Logon role.

3. Click **Save**.

Rules - Optional

The new *Has Event Request* attribute had been added to the Request data object for audit rules, workflow rules, and email reminder rules.

Rules Enhancements

Has Offline Agency Segments

The new *Has Offline Agency Segments* attribute had been added to the Request data object for audit rules, validation rules, workflow rules, and email reminder rules. This attribute is used to determine if the request contains segments that must be managed by the Agency (and not self-booked).

Example: To skip the TMC Agent step when the request does ***not*** contain any segment that should be managed by the agency, create this workflow rule:

Data Object	Field/Value	Operator
Request	Has Offline Agency Segments	EVERY, Equal
Value	No	

Main Destination Country

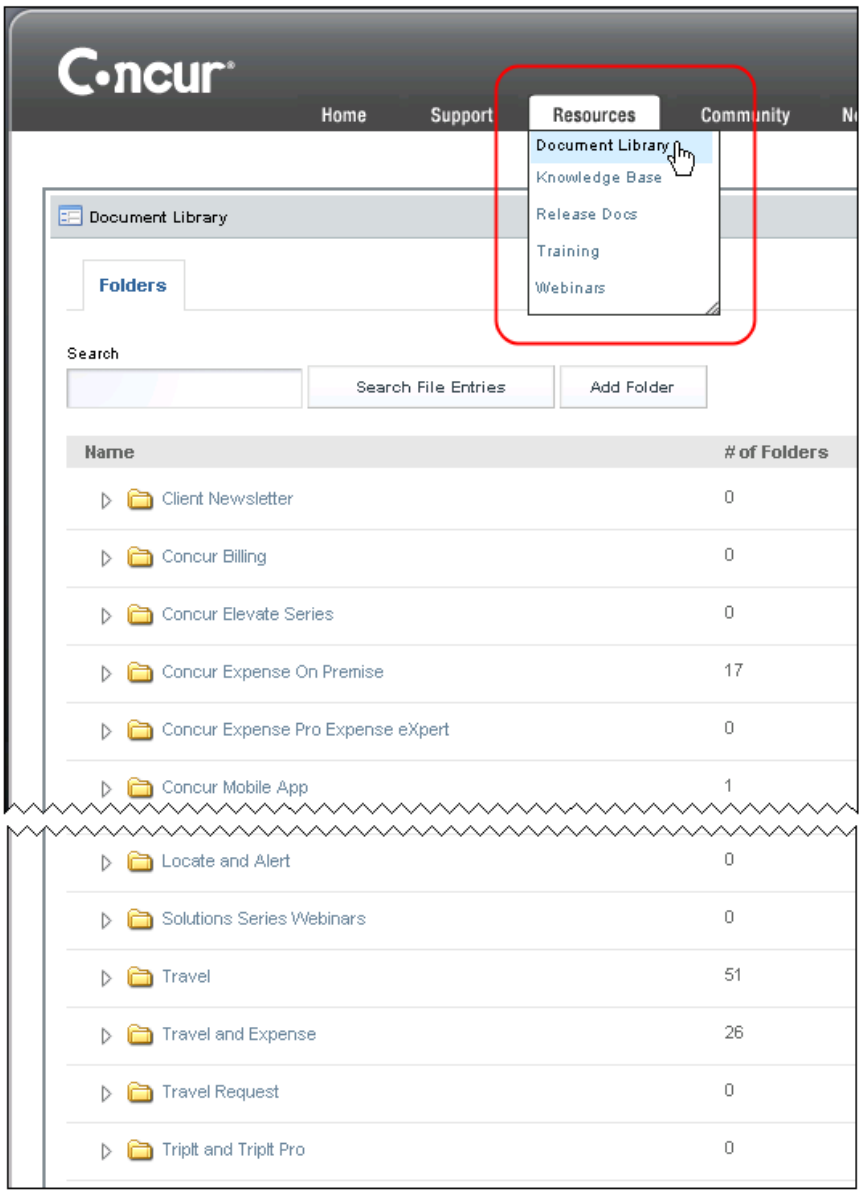
Main Destination Country is available in validation rules.

Additional Information

Where Do Clients Find Additional Documentation About Travel Request and Other Concur Products?

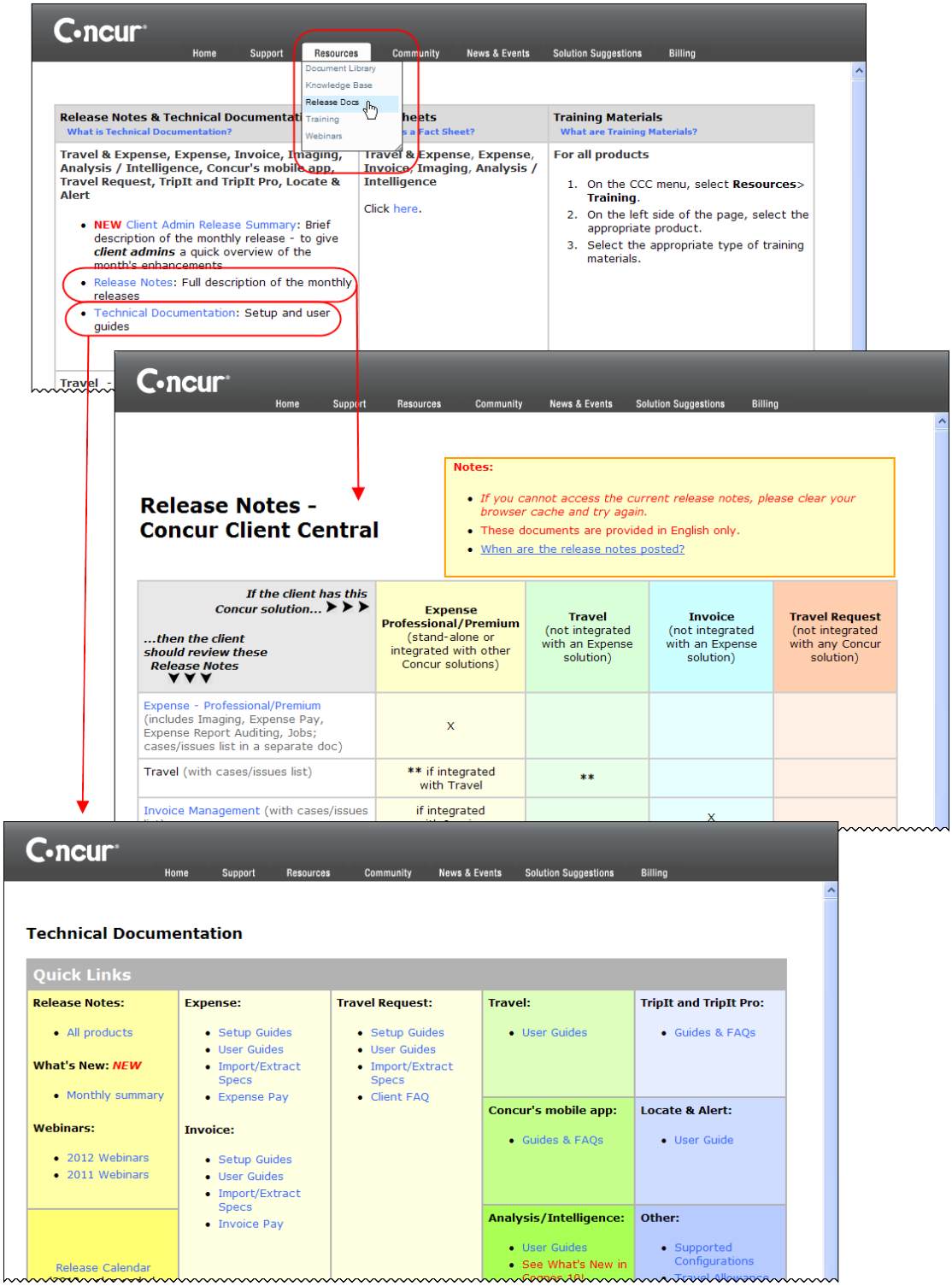
Concur Client Central > Resources > Document Library

A full set of technical documentation and release notes are available on Concur Client Central at Resources > Document Library.



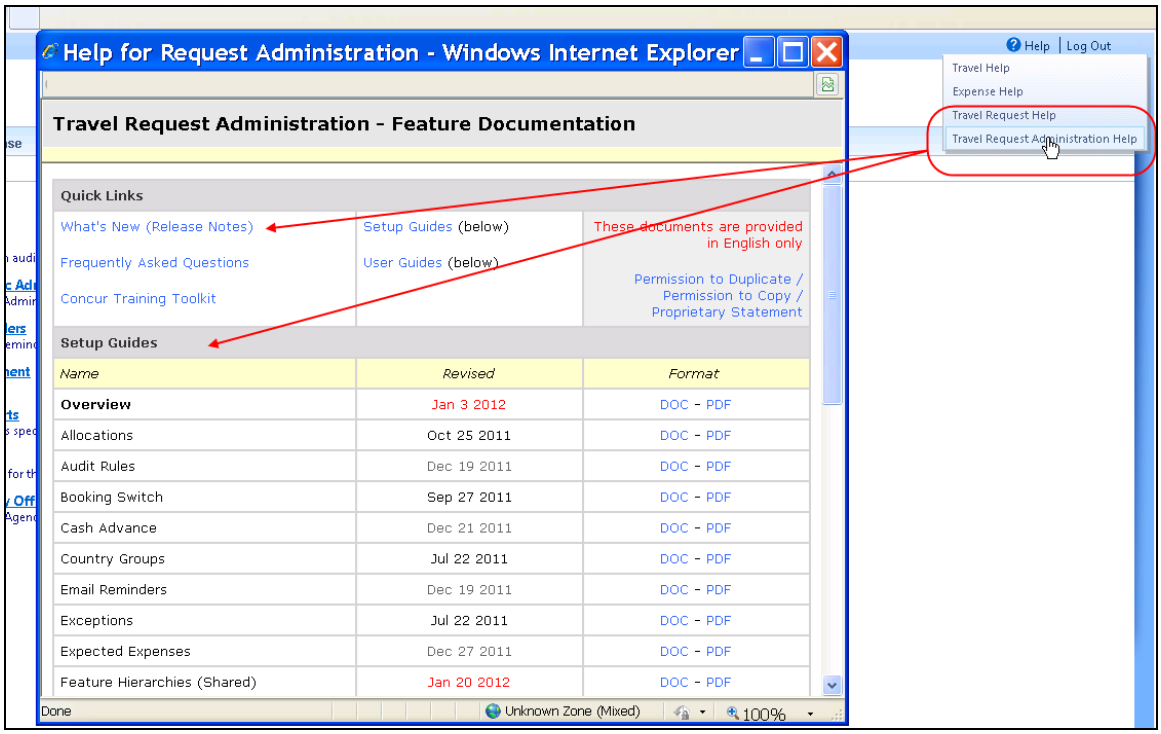
Concur Client Central > Resources > Release Documentation

A full set of Concur technical documentation and release notes are available on Concur Client Central at Resources > Release Documentation. Then, select **Release Notes** or **Technical Documentation**.



Online Help

Users with the Travel Request Administrator role can also access technical documentation and release notes in online help.



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
June 2013 Initial post: Thursday, June 13, 2:15 PM PT	Client

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The major features are:

- Email the approver when approval step expires
- Additional email options for workflow step rules
- Close/Inactivate request
- Additional extract fields
- Concur App Center – COMING SOON

The *Additional Information* section of these release notes shows where to find:

- Technical documentation about Request and other Concur products
- Release Notes about Request and other Concur products

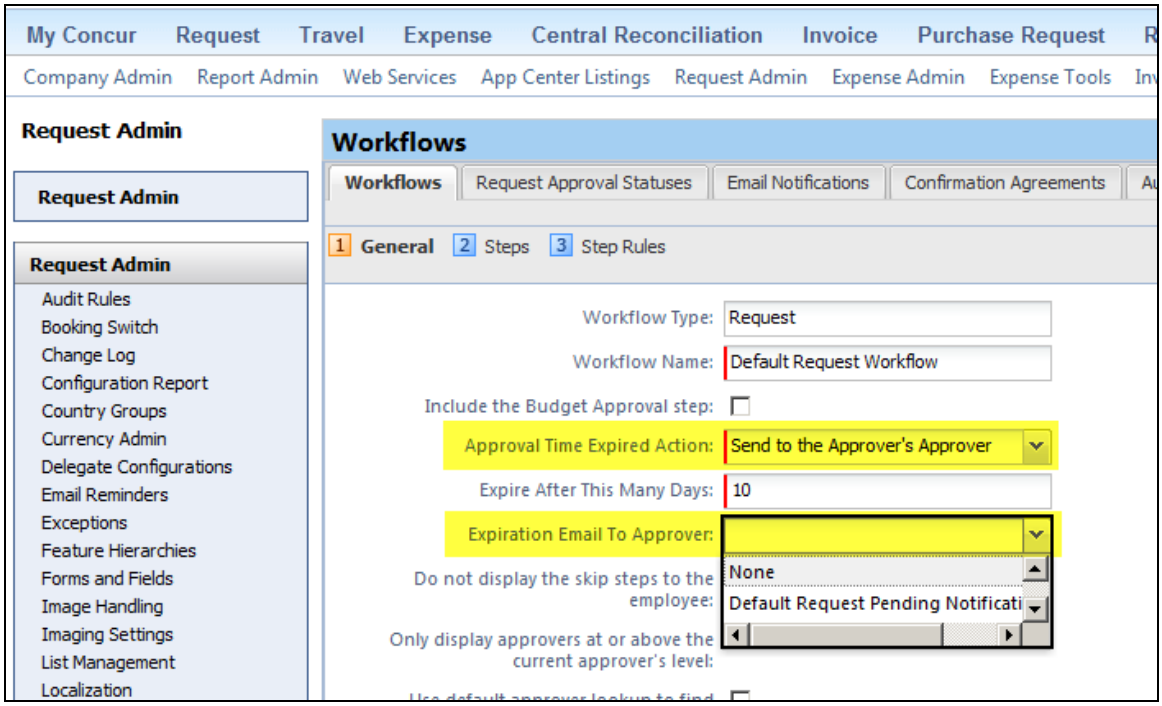
Release Notes

Email the Approver When Approval Step Expires

Overview

Request can now be configured to send an email notification to the approver when the approver's workflow step expires.

On the 1 **General** step of the workflow, if any option other than *None* is selected from the **Approval Time Expired Action** list, then the **Expiration Email to Approver** list appears.



By default, there are three choices available:

- None
- Default Request Pending Notification
- Default Request Status Change Notification

However, the client can use Workflows > Email Notifications to create a custom email if desired. That custom email notification can be used instead of a default notification.

Configuration

To create the custom email notification (if desired), the client can use Workflows > Email Notifications.

📖 Refer to the email notification information in the *Authorization Request: Workflow General Information Setup Guide*.

To activate the feature (select the desired email from the **Expiration Email to Approver** list), the client must contact Concur Client Support for assistance.

Additional Email Options for Workflow Step Rules

Overview

With this release, there is more flexibility available when defining email options for workflow step rules:

- **Email address:** You can either:
  - Enter an email address
    – or –
  - Send the email to the user's default approver
- **Email body and subject:** You can either:
  - Enter a subject line and message
    – or –
  - Select an email notification (either a default notification or you can create and use a custom email notification)

Configuration

To create the custom email notification (if desired), the client can use Workflows > Email Notifications.

📖 Refer to the email notification information in the *Authorization Request: Workflow General Information Setup Guide*.

To use the feature, the client must contact Concur Client Support for assistance.

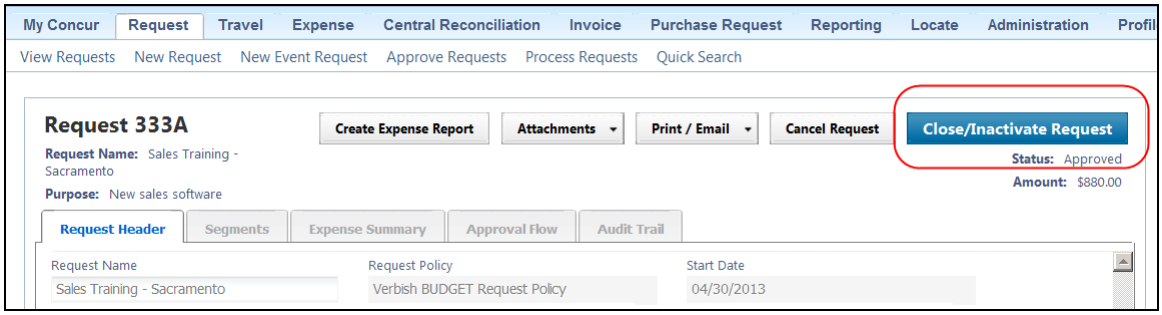
Close/Inactivate Request

Overview

If the client's configuration allows the user to close requests, the **Close Request** button appears on the request and on the request list. Unfortunately, there is some confusion about the button; users assume that it simply removes the request from the screen.

Actually, it removes the request from the user's list of active requests so the request can longer be assigned to an expense report. In addition, it reduces the balance of the request to zero.

In an effort to clarify the use of the button, it has been renamed **Close/Inactivate Request**.



Configuration

There is no configuration for this enhancement.

Additional Extract Fields

These fields have been added to the Request standard extract:

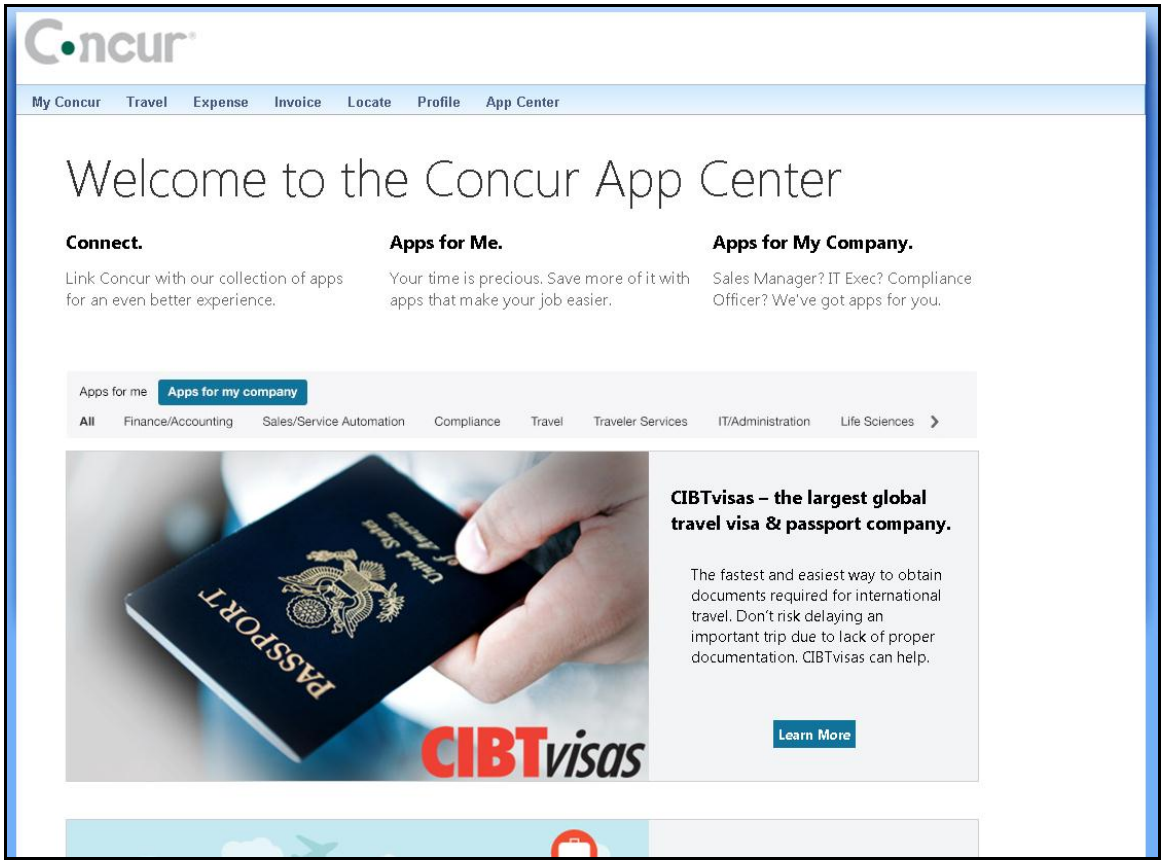
- Added to Request Data:
  - Request Event ID
- Added to Entry Level Data:
  - Cash Advance Related
  - Request Entry Budget Date

Refer to the *Standard Request Extract Specification*.

Concur App Center Coming Soon

Overview

The Concur **App Center** is a new tab in Concur that allows users to discover and enable applications that partners and Concur have developed to work with Concur products.



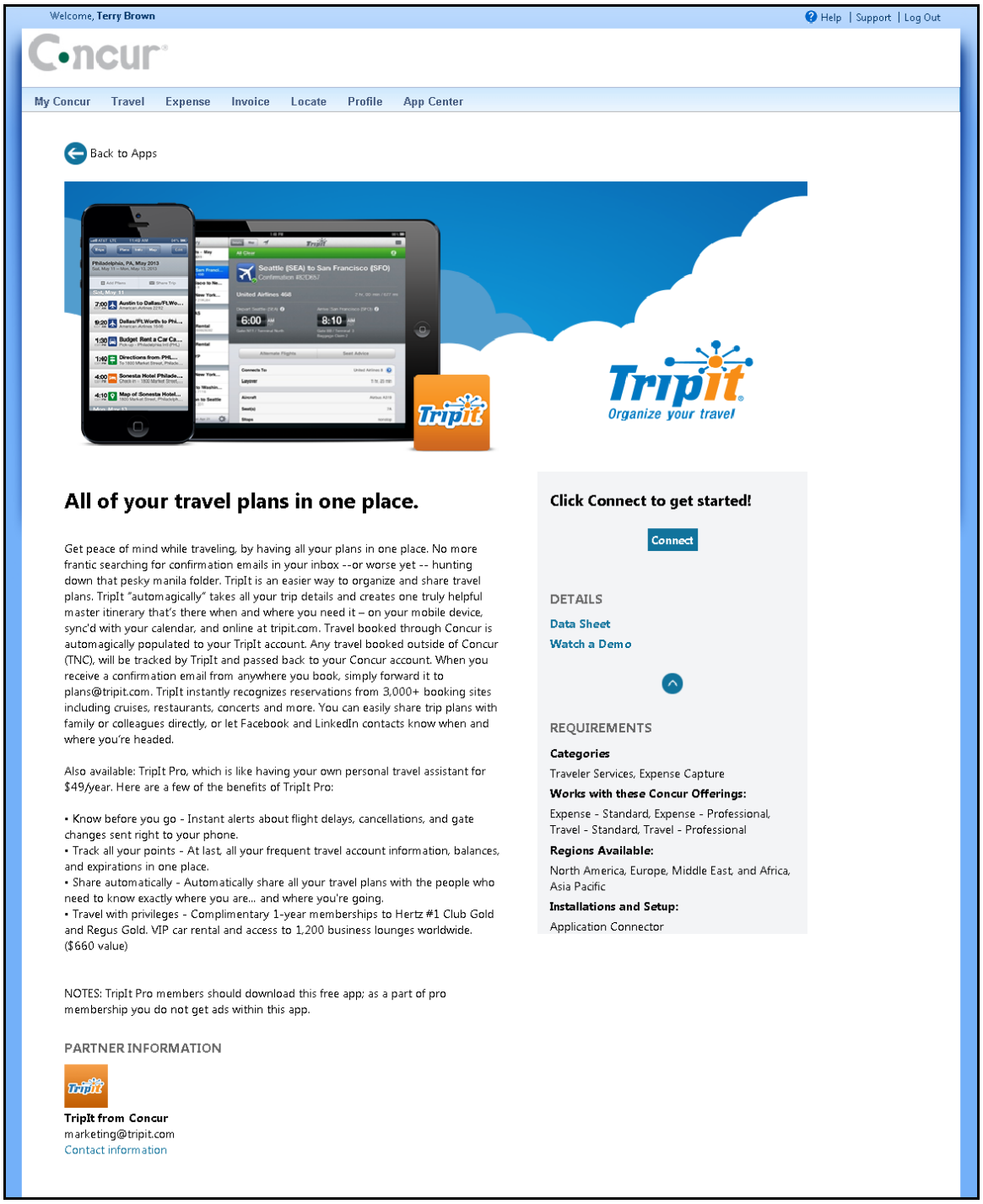
The applications use Concur's Platform to add value to Concur products by providing integration and additional management tools. The App Center has two tabs:

- **Apps for Me**: This tab contains applications that an end user can activate to authorize a secure exchange of data. TripIt is an example of this type of app. The end user can connect their Concur account to their TripIt account to enable trips booked in Concur to automatically flow into their TripIt account. If they do not have a TripIt account, they can learn more about the application and visit the TripIt website or the app store on their mobile device to create an account.

  Purchase and downloading of apps does not take place in the App Center. Additional examples include Concur for Mobile and various forms of e-receipts. Open Booking users will soon be able to connect their Concur accounts with various travel suppliers via the App Center, enabling itineraries booked on the supplier's website to flow into Concur.

- **Apps for My Business**: This tab contains applications that serve a variety of business functions. The apps need to be authorized by a Concur Administrator as they interact with data at a company-wide level or for multiple users. Example business apps include:
  - Integrations from VAT reclaim partners who extract expense data from Concur in order to calculate and process your company's VAT reclaim on eligible expenses.
  - The Concur Connector for Salesforce that integrates contacts and opportunity data between Concur and Salesforce.com.

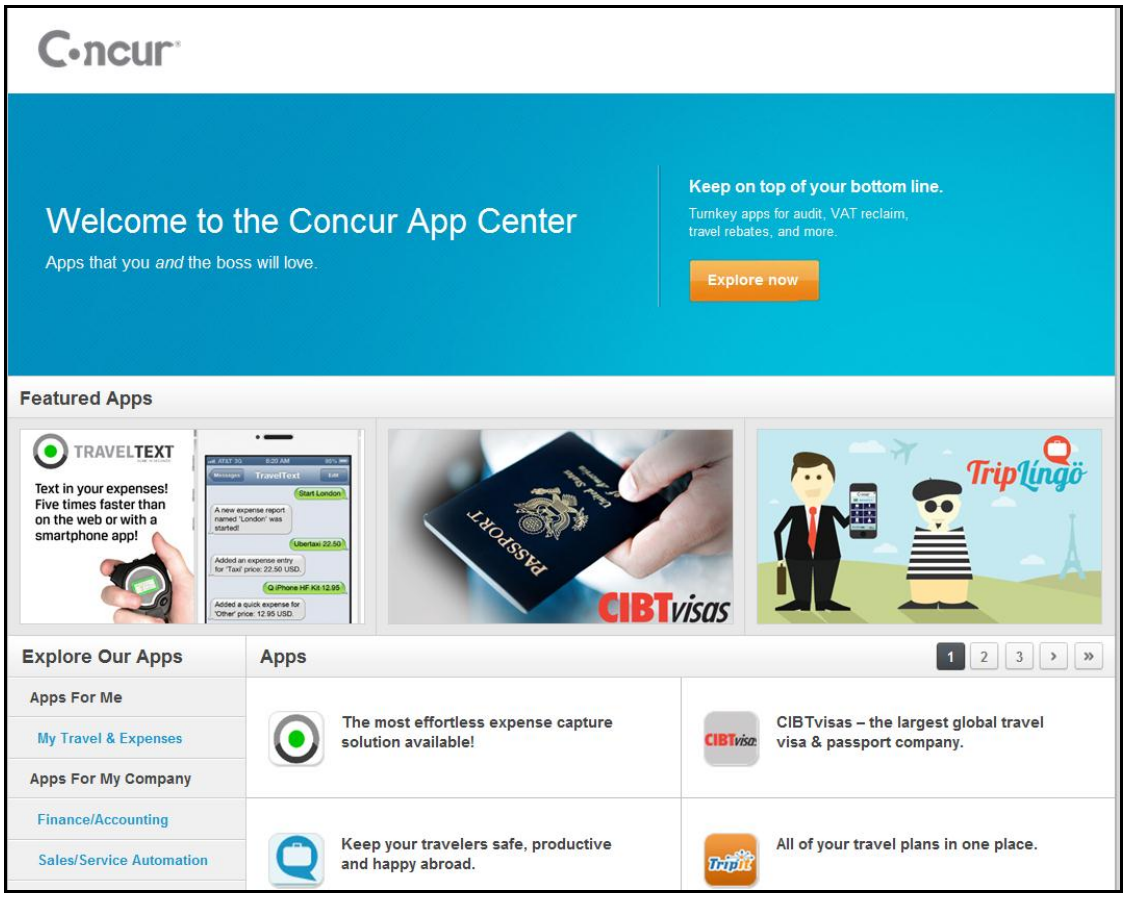
The App Center is not a store – the users and administrators can use it to learn about the applications and begin the procurement process. Once the user or administrator selects the app listing, they view the **Details** page:



User applications, like TripIt, include a **Connect** button that the user can click to connect their Concur account with their account at the partner's site.

The partners that create applications go through a certification process with Concur. Concur creates the App Center listing, which must be reviewed and approved by the partner and Concur before the listing can be active.

The App Center is also available on the concur.com website:



Tentative Release Schedule

The App Center on concur.com is available now: https://www.concur.com/appcenter

The in-product App Center will be made available on the following schedule. This release schedule is tentative and may change.

July 2013 Release: Standard US, UK and Australian Users

August 2013 Release: Professional US, UK and Australian Users

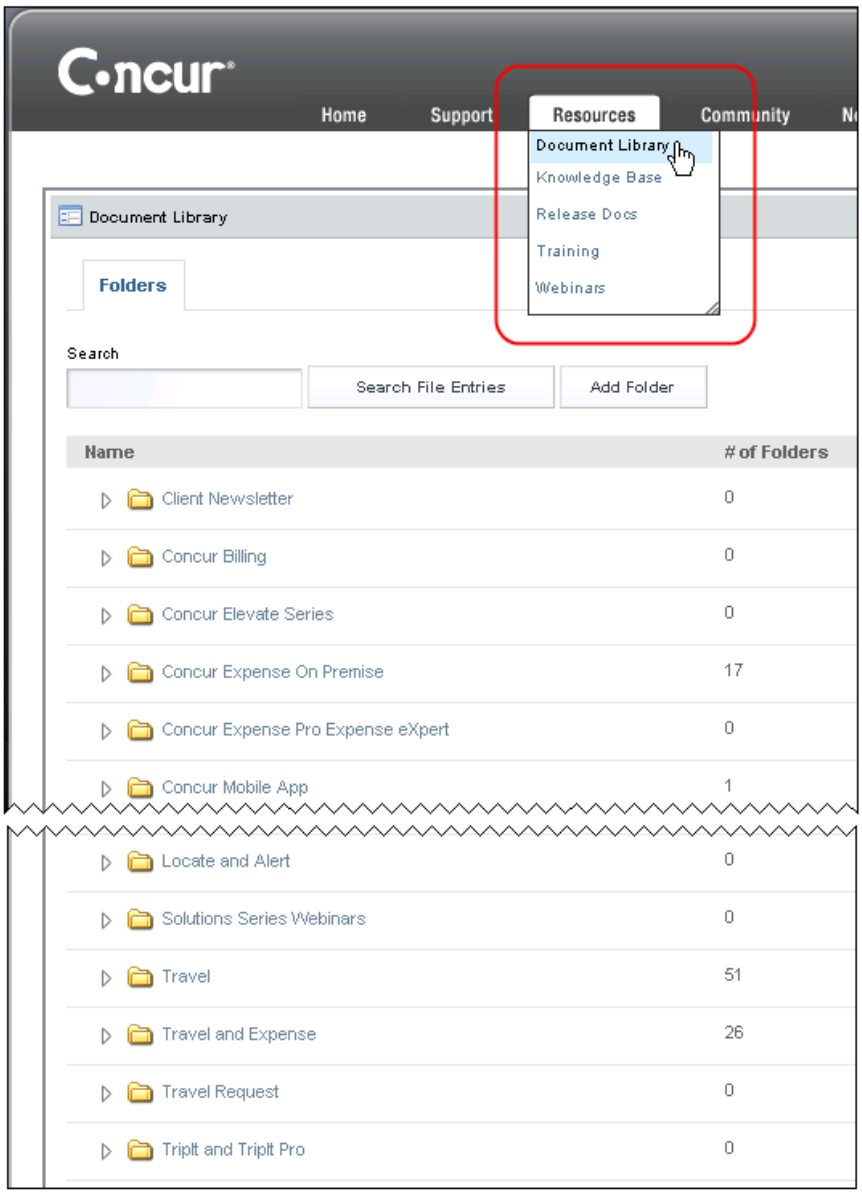
October 2013 Release: All other users, with localized listings.

Additional Information

Where Do Clients Find Additional Documentation About Request and Other Concur Products?

Concur Client Central > Resources > Document Library

A full set of technical documentation and release notes are available on Concur Client Central at Resources > Document Library.



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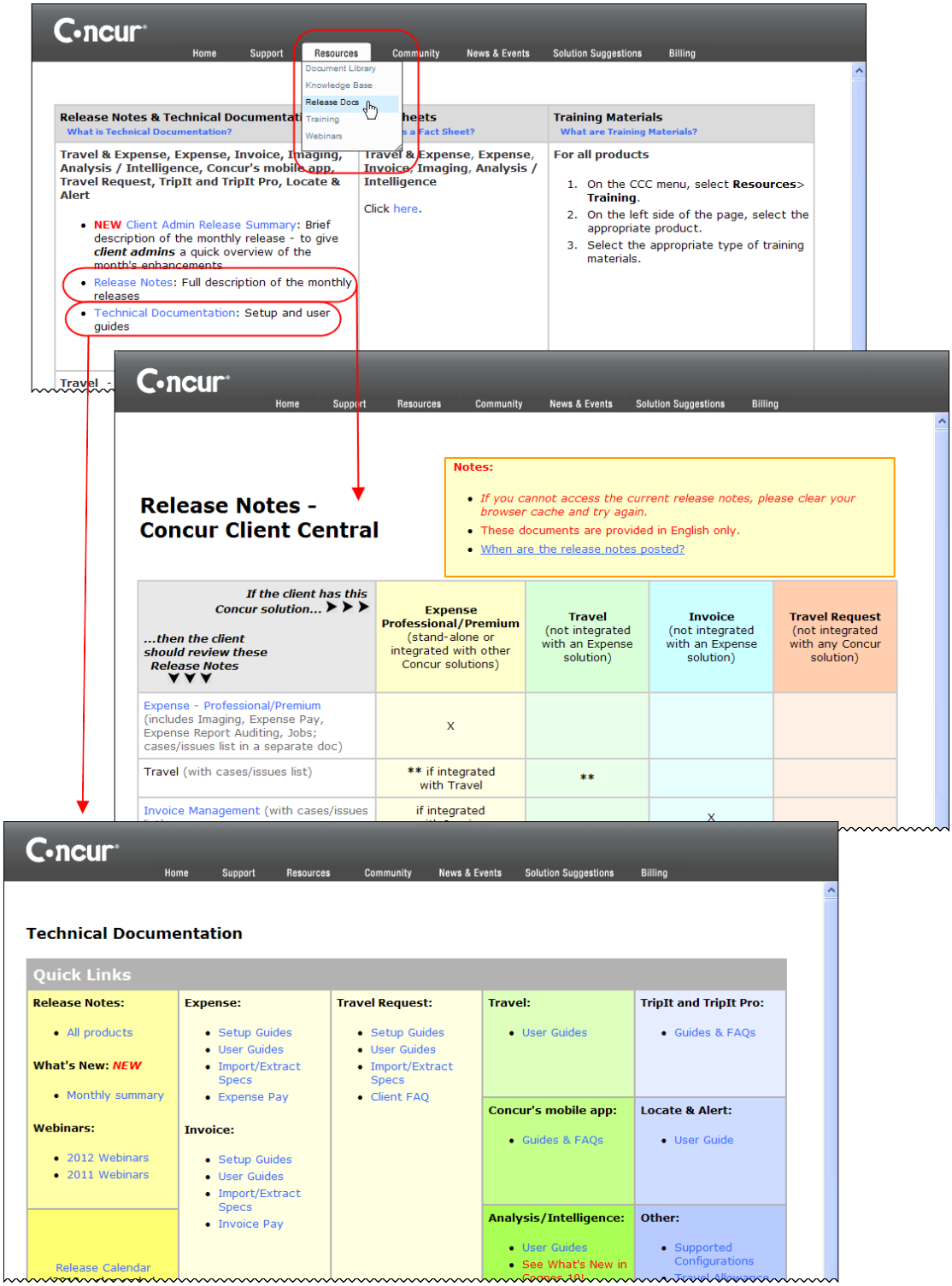
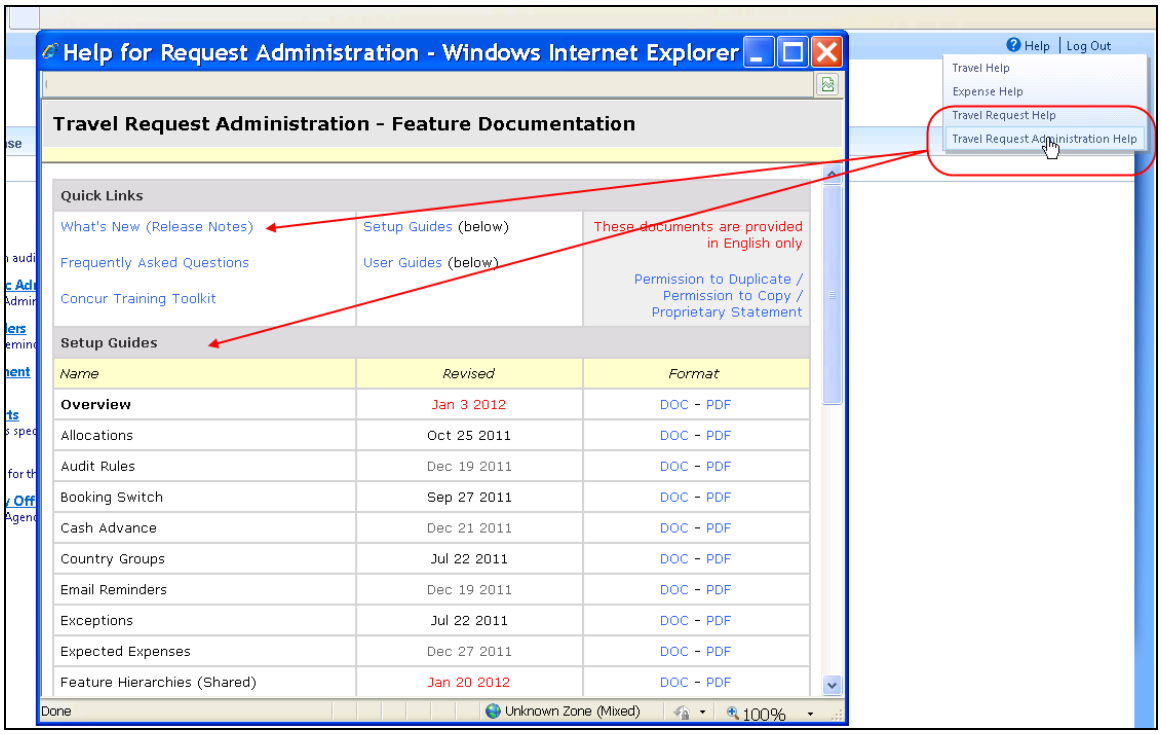


Online Help

Users with the Request Administrator role can also access technical documentation and release notes in online help.



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
July 2013 Update #1: Thursday, July 18, 10:30 AM PT	Client FINAL

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The major features are:

- New attendee fields
- **COMING SOON** Concur Update of Locations
- **COMING SOON** Concur App Center

The *Additional Information* section of these release notes shows where to find:

- Technical documentation about Request and other Concur products
- Release Notes about Request and other Concur products

Release Notes

New Attendee Fields

Overview

Concur Expense added new attendee fields so the new fields have been added to Request as well. They are:

- Middle initial
- Suffix
- Custom 21-Taxonomy
- Custom 22-Tax ID
- Custom 23-Covered Recipient ID
- Custom 24
- Custom 25

In addition, they have need added to the condition editor in:

- Audit Rules
- Audit Rules (Validations)
- Workflow

Configuration

These fields are automatically available. No configuration is necessary.

COMING SOON Concur Update of Locations – Tentative Target of August

Concur will update the United Nations LOCODE list for the Locations module, meaning each client will see the updated codes. This is scheduled for the August service release at this time.

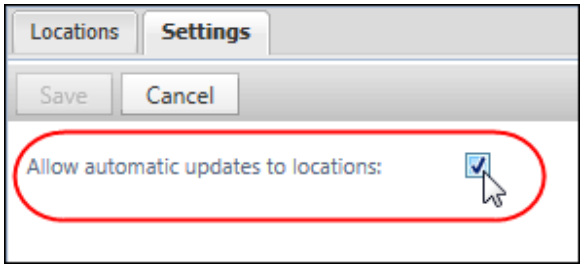
Important! - Update Site Settings to Prevent Updates!

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

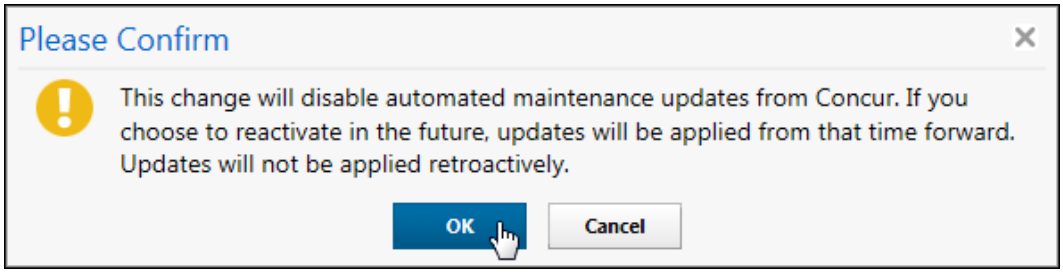
A check box that prevents Concur from automatically updating the client's list of Locations is available to the Locations administrator. Use this check box to prevent Concur from automatically updating locations at your company.

Explanation of Behavior

The new check box, **Allow automatic updates to locations**, is available on the new 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. A confirmation message explaining this appears when you disable the setting.

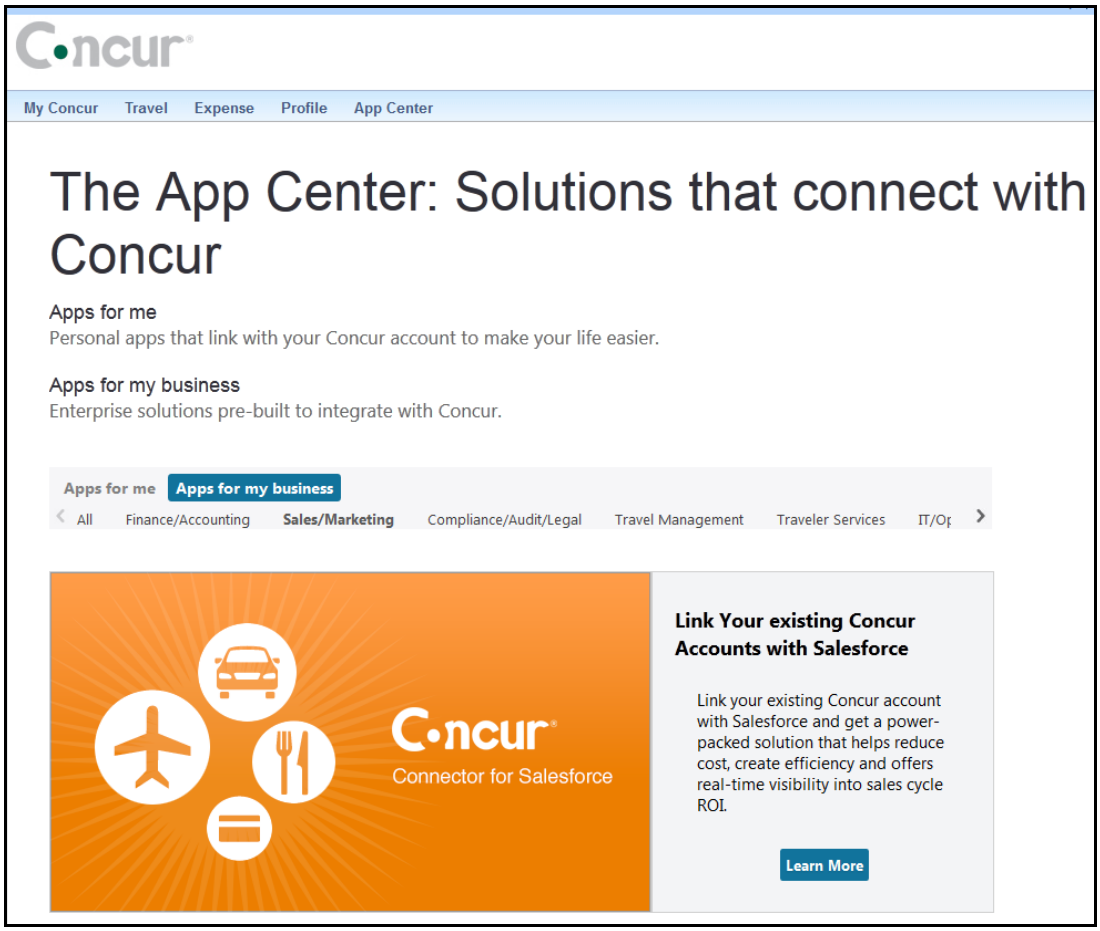


⚠ **IMPORTANT!** *Once disabled, it will be the responsibility of the client to maintain their list of locations. Further, Concur cannot retroactively identify and update location data for a client during the disablement period should the client elect to re-enable the setting: only changes going forward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

COMING SOON Concur App Center

Overview

The Concur App Center is a new tab in Concur that allows users to discover and enable applications that partners and Concur have developed to work with Concur products.

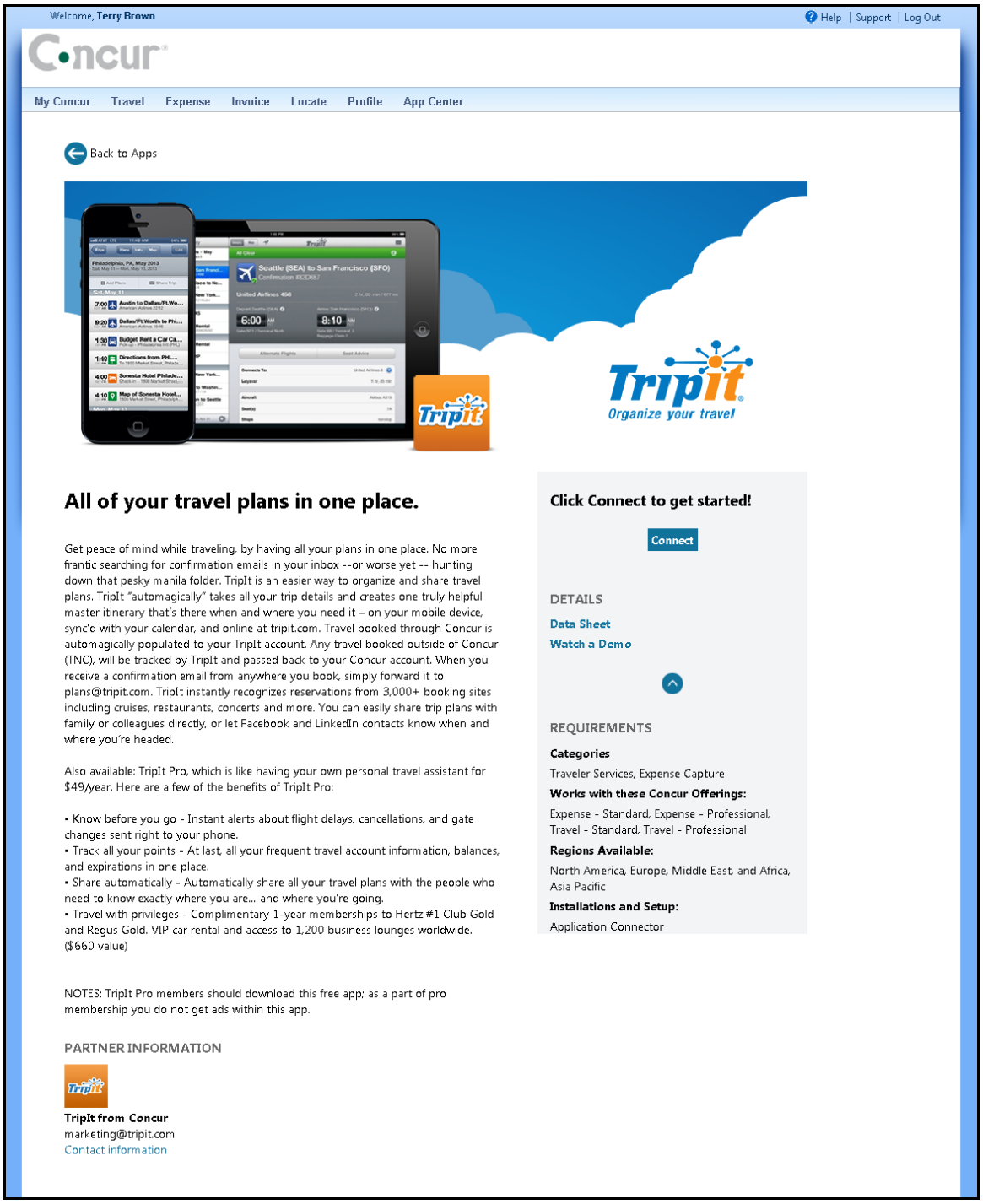


The applications use Concur's Platform to add value to Concur products by providing integration and additional management tools. The App Center has two tabs:

- **Apps for me**: This tab contains applications that an end user can activate to authorize a secure exchange of data. TripIt is an example of this type of app. The end user can connect their Concur account to their TripIt account to enable trips booked in Concur to automatically flow into their TripIt account. If they do not have a TripIt account, they can learn more about the application and visit the TripIt website or the app store on their mobile device to create an account. Purchase and downloading of apps does not take place in the App Center. Additional examples include Concur Mobile and various forms of e-receipts. Open Booking users will soon be able to connect their Concur accounts with various travel suppliers via the App Center, enabling itineraries booked on the supplier's website to flow into Concur.
- **Apps for my business**: This tab contains applications which serve a variety of business functions. The apps need to be authorized by a Concur Administrator as they interact with data at a company-wide level or for multiple users. Example business apps include:
    - Integrations from VAT reclaim partners who extract expense data from Concur in order to calculate and process your company's VAT reclaim on eligible expenses.

- The Concur Connector for Salesforce which integrates contacts and opportunity data between Concur and Salesforce.com.

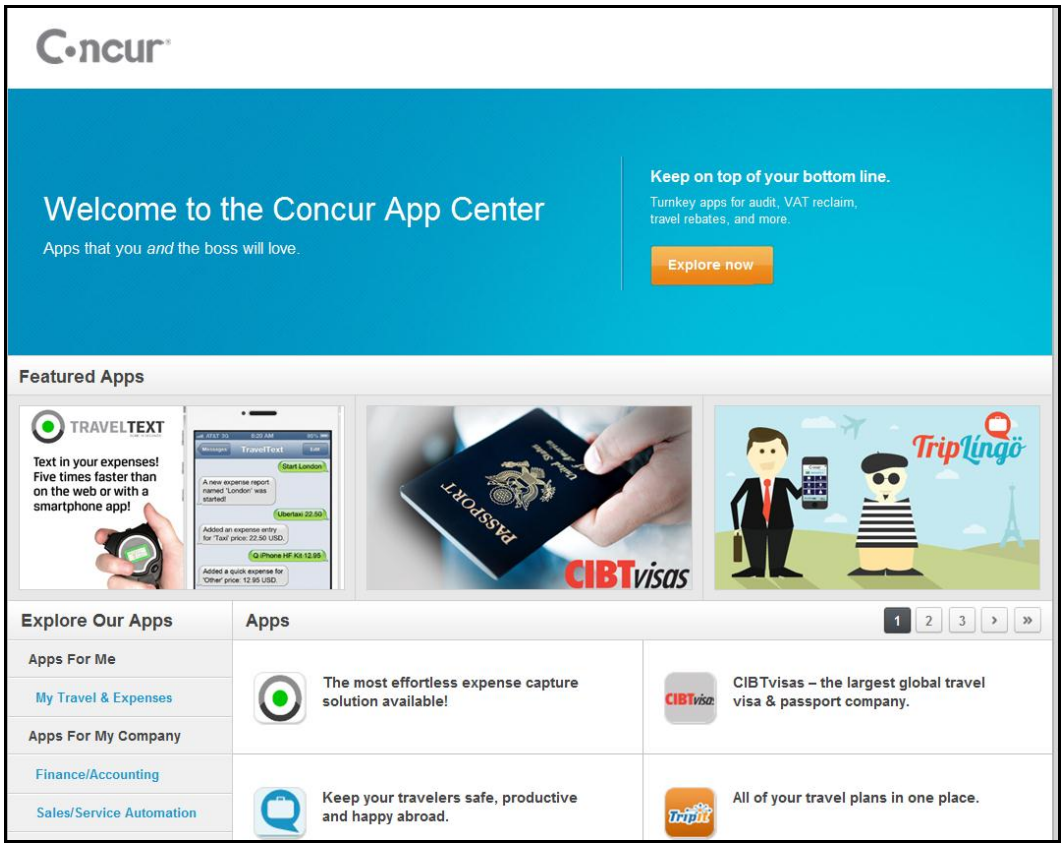
The App Center is not a store- the users and administrators can use it to learn about the applications and begin the procurement process. Once the user or administrator selects the app listing, they view the **Details** page:



User applications, like TripIt, provide a **Connect** button that the user can click to connect their Concur account with their account at the partner's site. Company applications provide a button to **Inquire**, which is the recommended method for engaging with a partner to evaluate and procure their application.

The partners that create applications go through a certification process with Concur. Concur creates the App Center listing, which must be reviewed and approved by the partner and Concur before the listing can be active.

The App Center is also available on the concur.com/appcenter website:



Tentative Release Schedule

The App Center on concur.com is available now: https://www.concur.com/appcenter

The in-product App Center will be made available on the following schedule. This release schedule is tentative and may change.

July 2013 Release: Clients using Standard Travel and/or Expense with users in the US, UK and Australian only.

August 2013 Release: Clients using Professional Travel and/or Expense with users in the US, UK and Australian only

October 2013 Release: All other clients

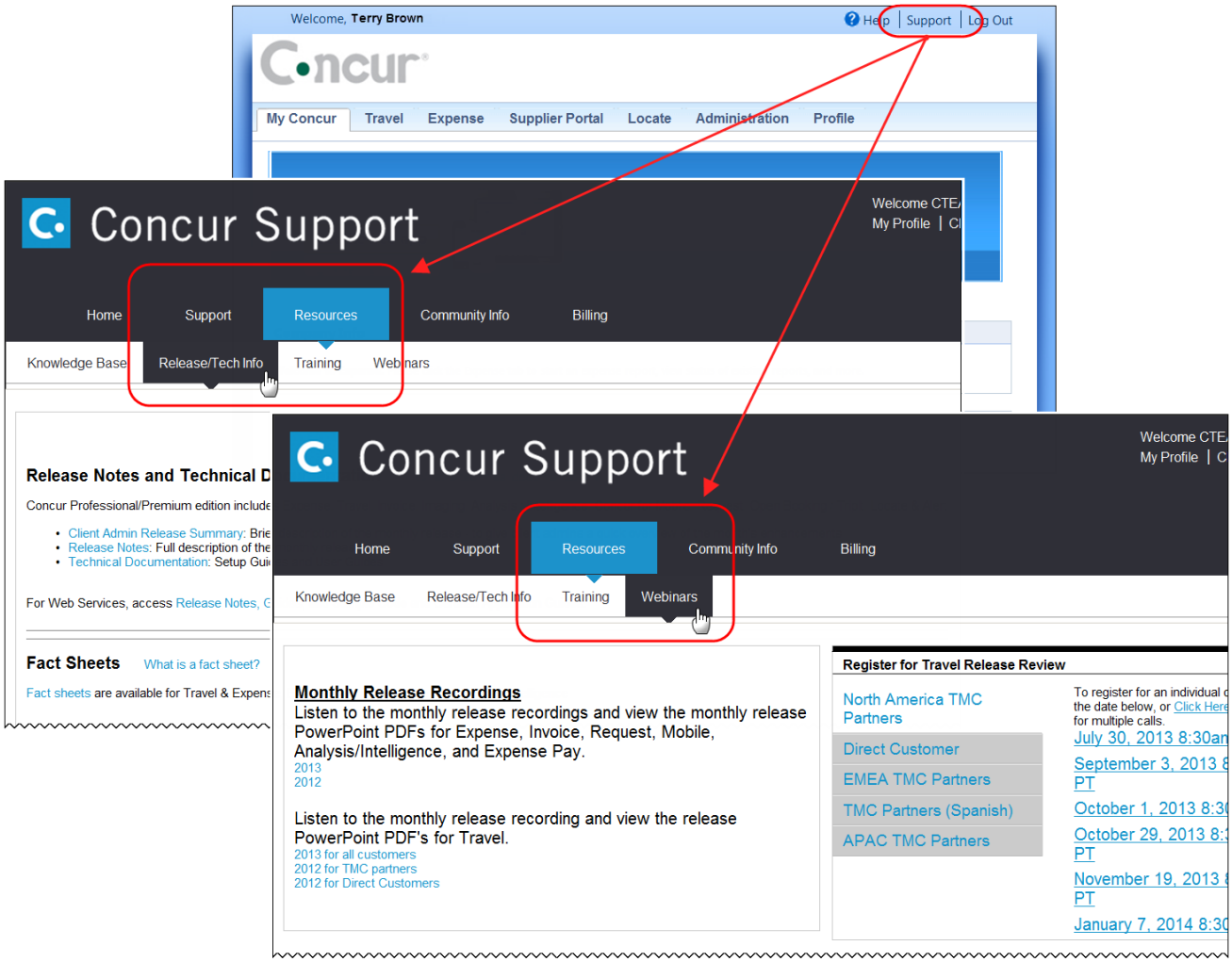
Additional Release Notes, Webinars, and Technical Documentation

Concur Support Portal

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

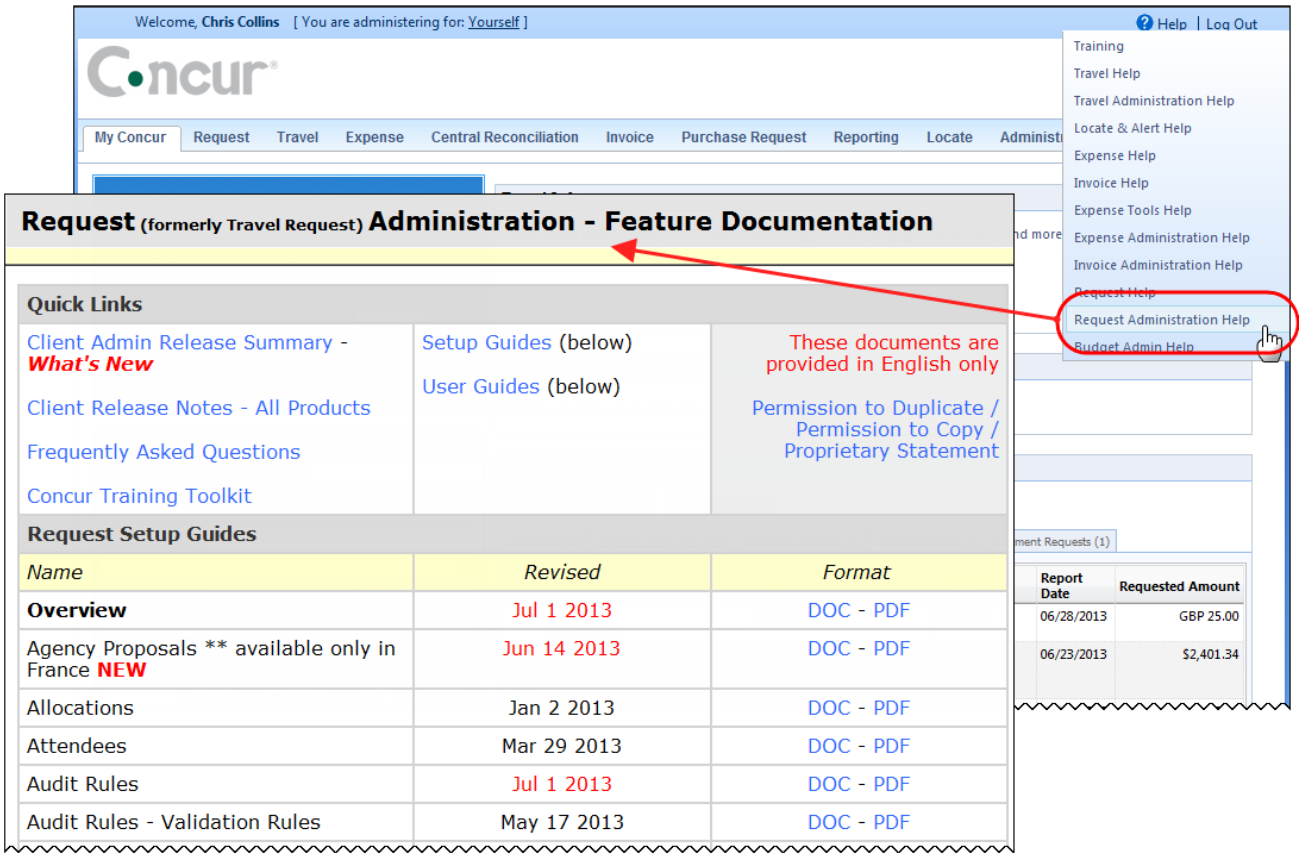
If you have the proper permissions, the **Support** menu is available to you in Concur. Click **Support** and then – in the Concur Support portal – click **Resources**.

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



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 **Authorization Request (formerly Travel Request)**	
Month	**Audience**
August 2013 Initial post: Thursday, August 22, noon PT	Client

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The major features are:

- Default approver enhancements
- New role for Budget Insight and Analysis/Intelligence

Release Notes

Default Approver Enhancements

Overview

This release brings two workflow enhancements:

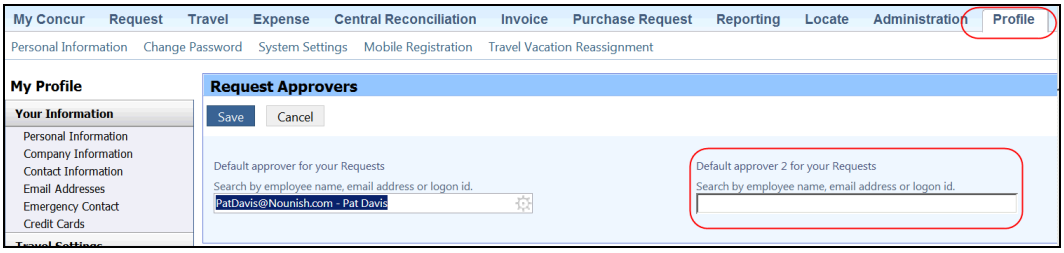
- The Default Approver role can be used at ***any*** workflow step. Previously, the Default Approver was restricted to the first step.
- The Default Approver 2 role has been added, so clients can create a simple two-step approval workflow using ***default*** approvers.

These default approvers are ***not*** part of a hierarchy nor do they meet a complicated set of conditions – they are simply the default approvers listed in the user's Profile.

NOTE: Currently, there is one default approver listed in the user's Profile. With this release, there are two – as described below.

The process is:

- The admin configures a workflow step to use Default Approver 2.
- Any user associated with that workflow (via policy and group) will now have a **Default Approver 2** field in Profile, in addition to the existing default approver field.



- Then, the **Default Approver 2** field is populated in Profile, either by the User Admin, via the employee import, or by the user (if allowed).

NOTE: One of the traditional features in Concur allows clients to define whether users can select their own approvers – in addition to approvers being added by the User Admin and/or via the employee import. That option works the same way here; the availability of a second default approver does not change that. Also, that setting – whether OFF or ON – applies to **both** approver fields.

As an example – assume that the admin sets Default Approver for the first approval step and Default Approver 2 for the next approval step. Then, when the user creates a request associated with that workflow, Concur first routes the request to the Default Approver and then to the Default Approver 2.

Note the following:

- If the user is allowed to select a different policy and if that policy does not use a workflow with Default Approver 2, then the Default Approver 2 in the user's Profile is ignored, as expected.
- Another traditional feature in Concur is to allow the client to define whether the user and/or approver can change approvers "on the fly." That option works the same way here; the availability of a second default approver does not change that.

Configuration

To change the Default Approver to a workflow step other than the first step, contact Concur Client Support for assistance.

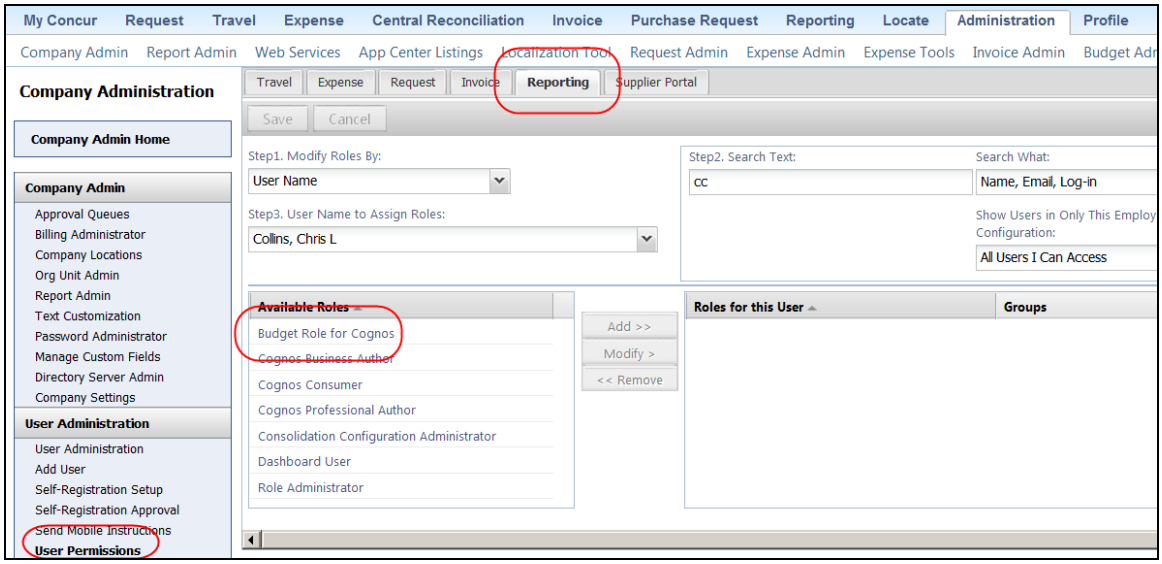
To use Default Approver 2 in a workflow:

- To add Default Approver 2 to a workflow step, contact Concur Client Support for assistance.
- The User Admin or the user (if allowed) populates the **Default Approver 2** field in Profile.

NOTE: In September, the Default Approver 2 field will be added to both the overnight Employee Import and the on-demand (spreadsheet) user import.

New Role for Budget Insight and Analysis/Intelligence

There is a new role in Company Administration > User Permissions, on the **Reporting** tab. This role can be assigned to Budget Insight users who are also Analysis/Intelligence users so they can access the new Budget module in the Analysis/Intelligence data model.



⚠ **IMPORTANT:** Be aware that all other roles associated with Analysis/Intelligence use the Reporting hierarchy to determine the data that is available to the report user. The new Budget Role for Cognos does not – it uses the Budget hierarchy to determine the data that is available to the report user.

📖 For more information about the new Budget module in Analysis/Intelligence, refer to the Analysis/Intelligence release notes for this month.

Concur App Center Now Available

Overview

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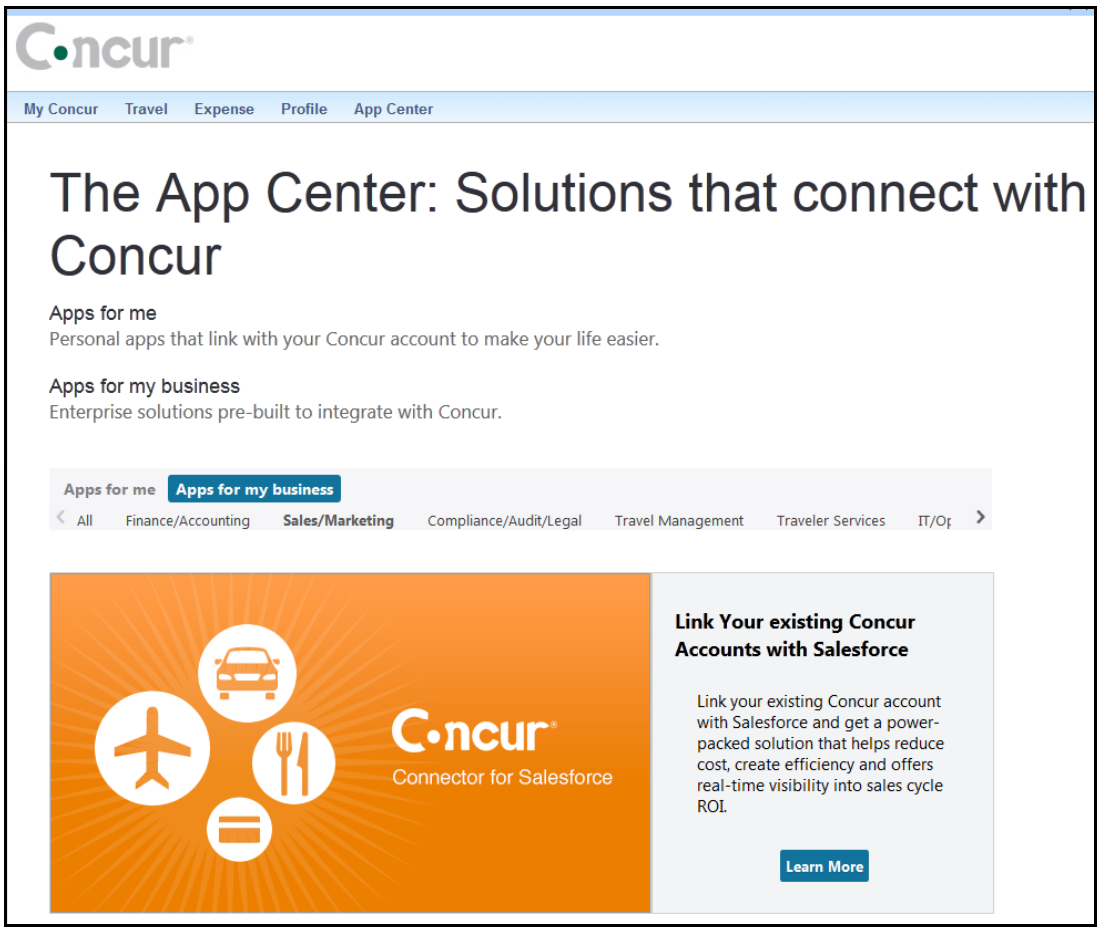

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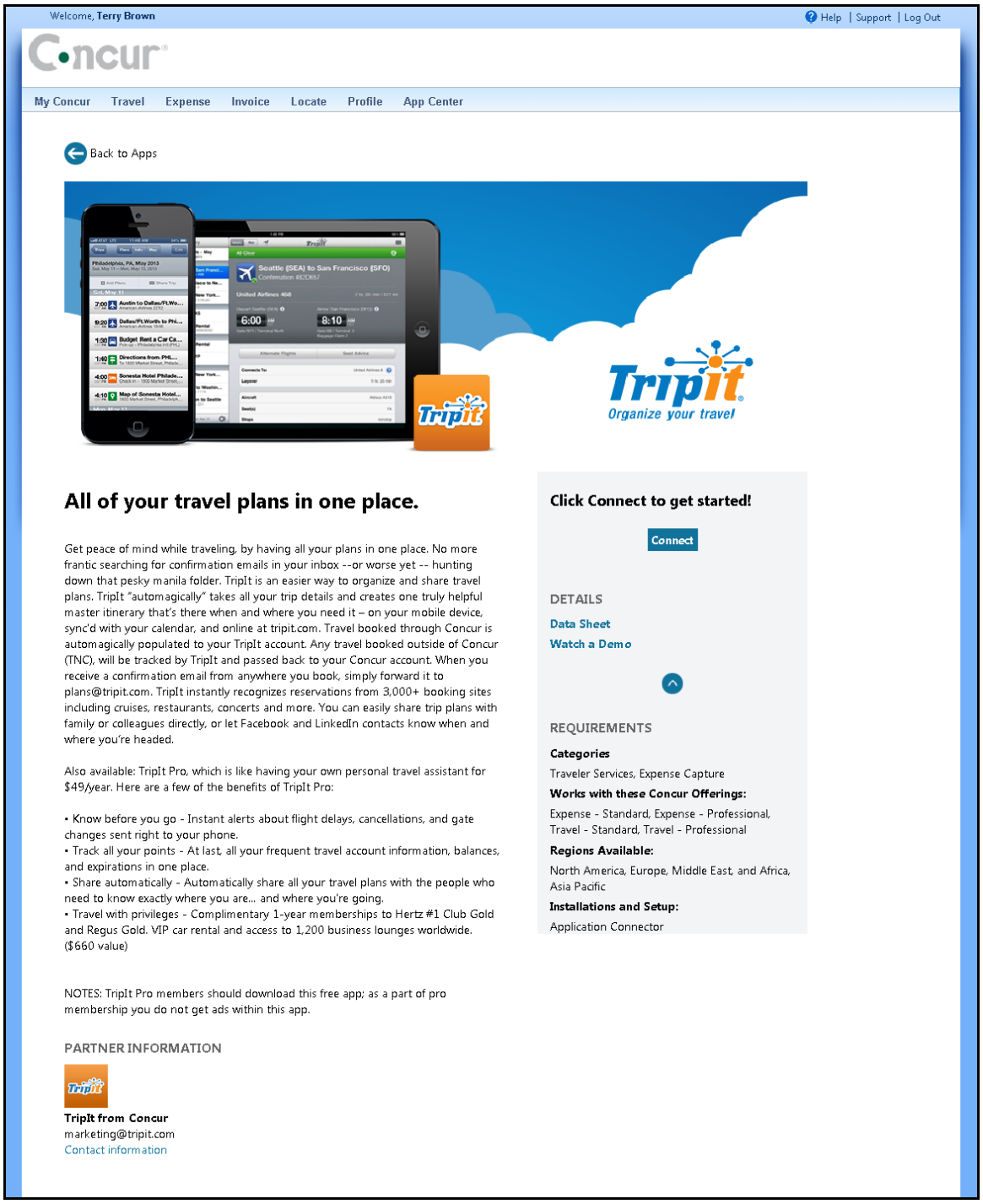

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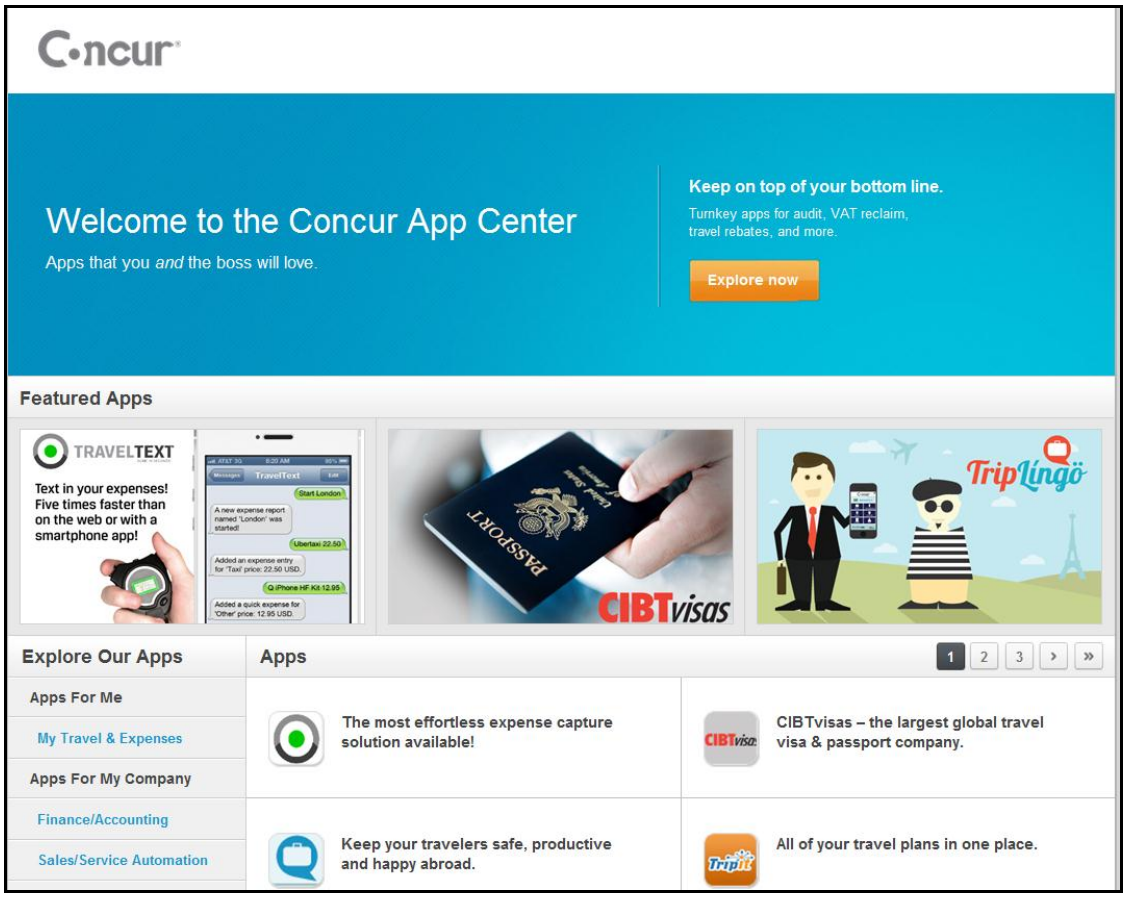
The partners that create applications go through a certification process with Concur. Concur creates the App Center listing, which must be reviewed and approved by the partner and Concur before the listing can be active.

The App Center is also available on the concur.com/appcenter website:



Tentative Release Schedule

The App Center on concur.com is available now: https://www.concur.com/appcenter

The in-product App Center will be made available on the following schedule. This release schedule is tentative and may change.

August 2013 Release: Clients using Professional Travel and/or Expense with users in the US, UK and Australian only.

October 2013 Release: All other clients.

Additional Release Notes, Webinars, and Technical Documentation

Concur Support Portal

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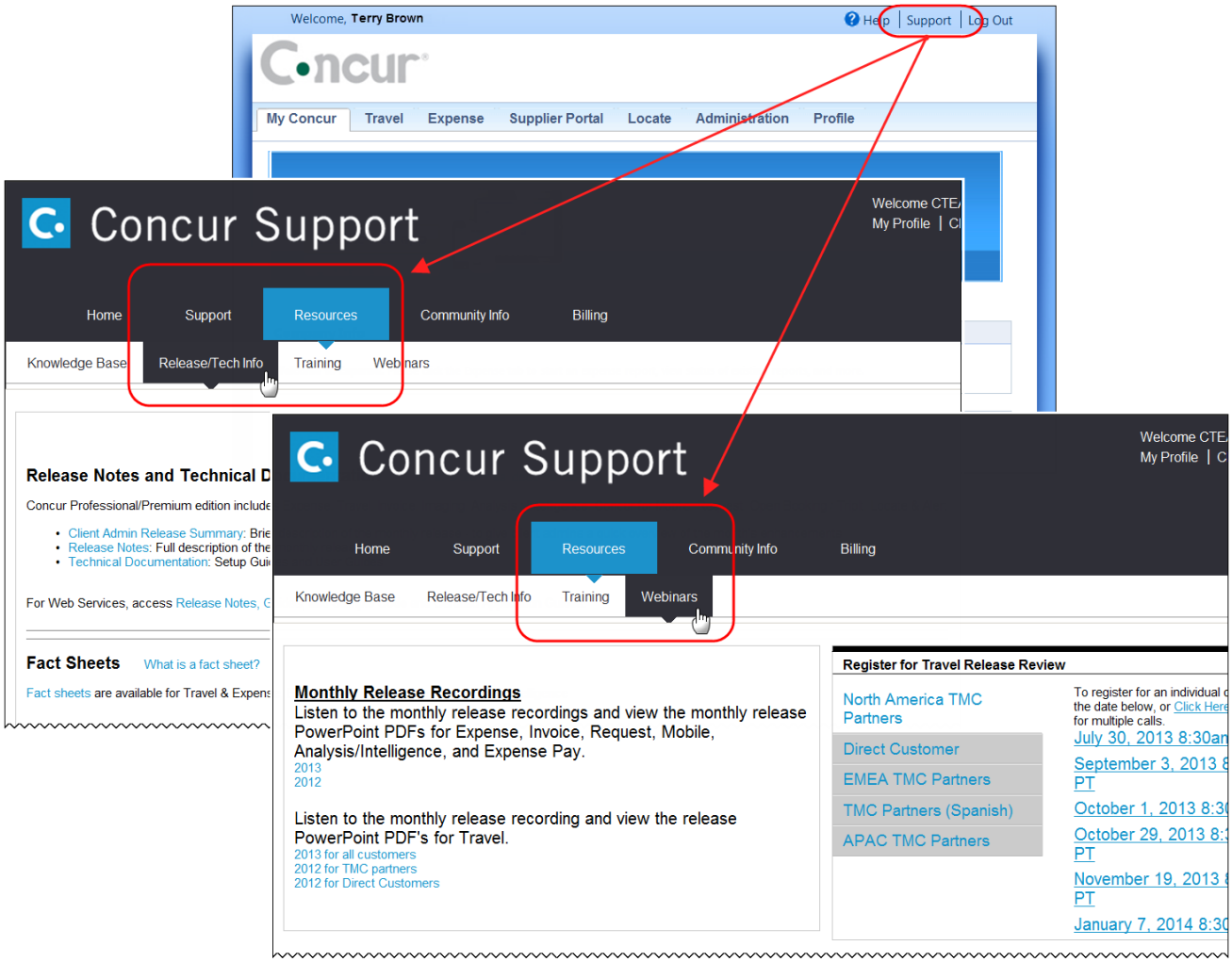

Online Help – Admins

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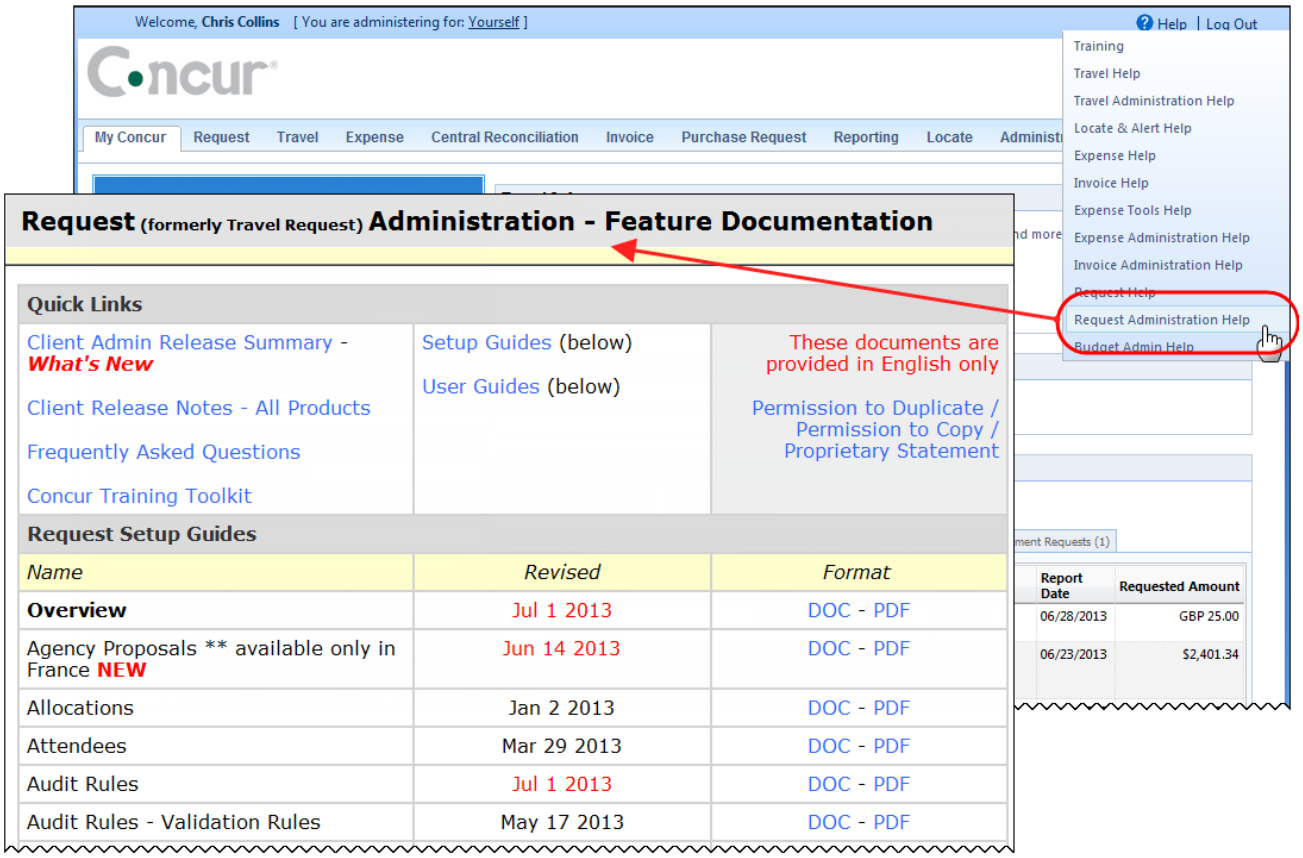


Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
September 2013 Update #1: Friday, September 20, 3:30 PM PT	Client

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The features this month are:

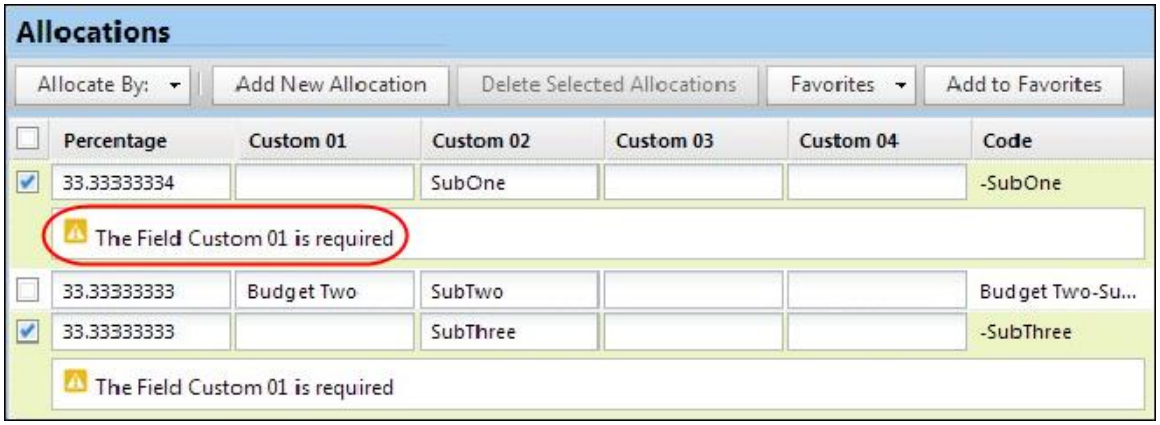
- Display of allocation-level exceptions
- Legacy attendee-related audit rule options
- Printed reports – Allocation codes
- **Coming Soon** Locations - Maintenance Updates in an Upcoming Service Release

Release Notes

Display of Allocation-Level Exceptions

Overview

With this release, Request will display allocation-level exceptions with the allocation, at the associated row.



Prior to this release, allocation-level exceptions displayed at the parent expense entry level, making identification of the allocation in question more difficult. Now, when an exception is detected, the page refreshes with the exception displayed, but does not leave the **Allocations** page – it remains visible so the user can take action as required.

Configuration

No additional configuration is required to use this feature.

Legacy Attendee-Related Audit Rule Options

There are several attendee-related audit rule options that are used ***only*** by clients using the legacy Authorization Request feature of Concur Expense. These options are now available in Request.

A full description of these options is available in the *Authorization Request: Audit Rules Setup Guide*.

Printed Reports – Allocation Codes

Currently, on the printed report, allocation information appears but the allocation code does not. With this release, the allocation code appears.

Coming Soon Locations - Maintenance Updates in an Upcoming Service Release

Overview

All clients configured to receive Location updates from Concur will see approximately 40,000 new locations added to the system in an upcoming service release. Therefore, clients wishing to opt out of this maintenance should update this site setting sometime before this upgrade is performed in a future release.

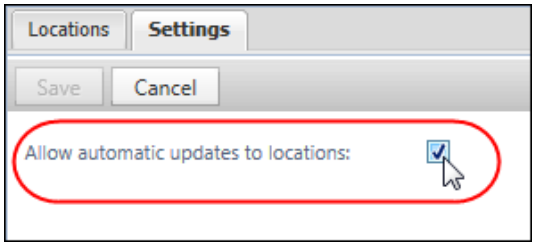
Important! - Update Site Settings to Prevent Updates!

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

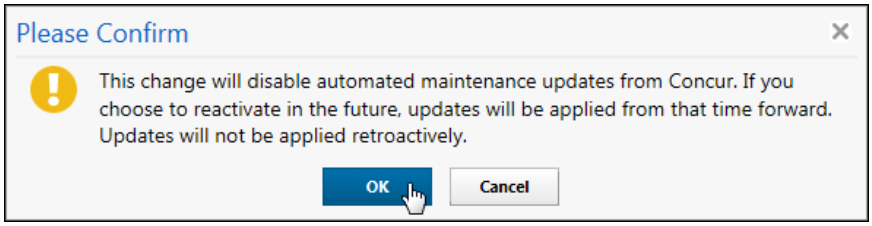
A check box that prevents Concur from automatically updating the client's list of Locations is available to the Locations administrator. Use this check box to prevent Concur from automatically updating locations at your company.

Explanation of Behavior

The new check box, **Allow automatic updates to locations**, is available on the new 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 a future service release. A confirmation message explaining this appears when you disable the setting.

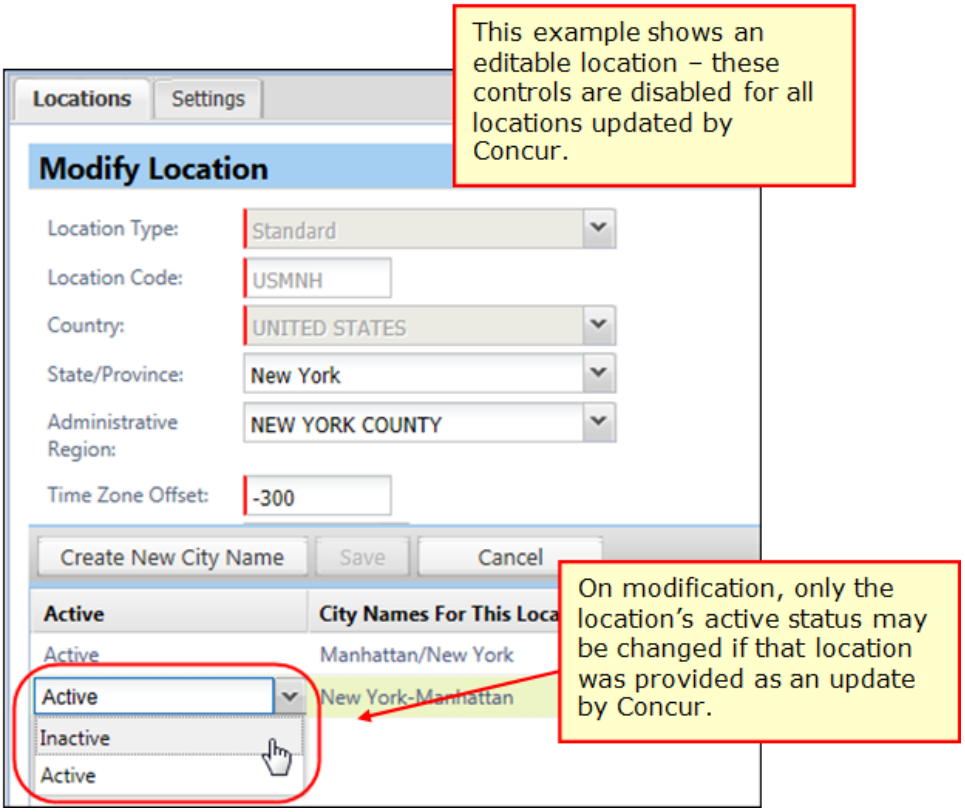


⚠ *Once disabled, it will be the responsibility of the client to maintain their list of locations. Further, Concur cannot retroactively identify and update location data for a client during the disablement period should the client elect to re-enable the setting: only changes going forward from the date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

Clients configured to receive the Concur update of Locations based on the United Nations LOCODE list will be restricted from modifying these locations. Instead, 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

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.



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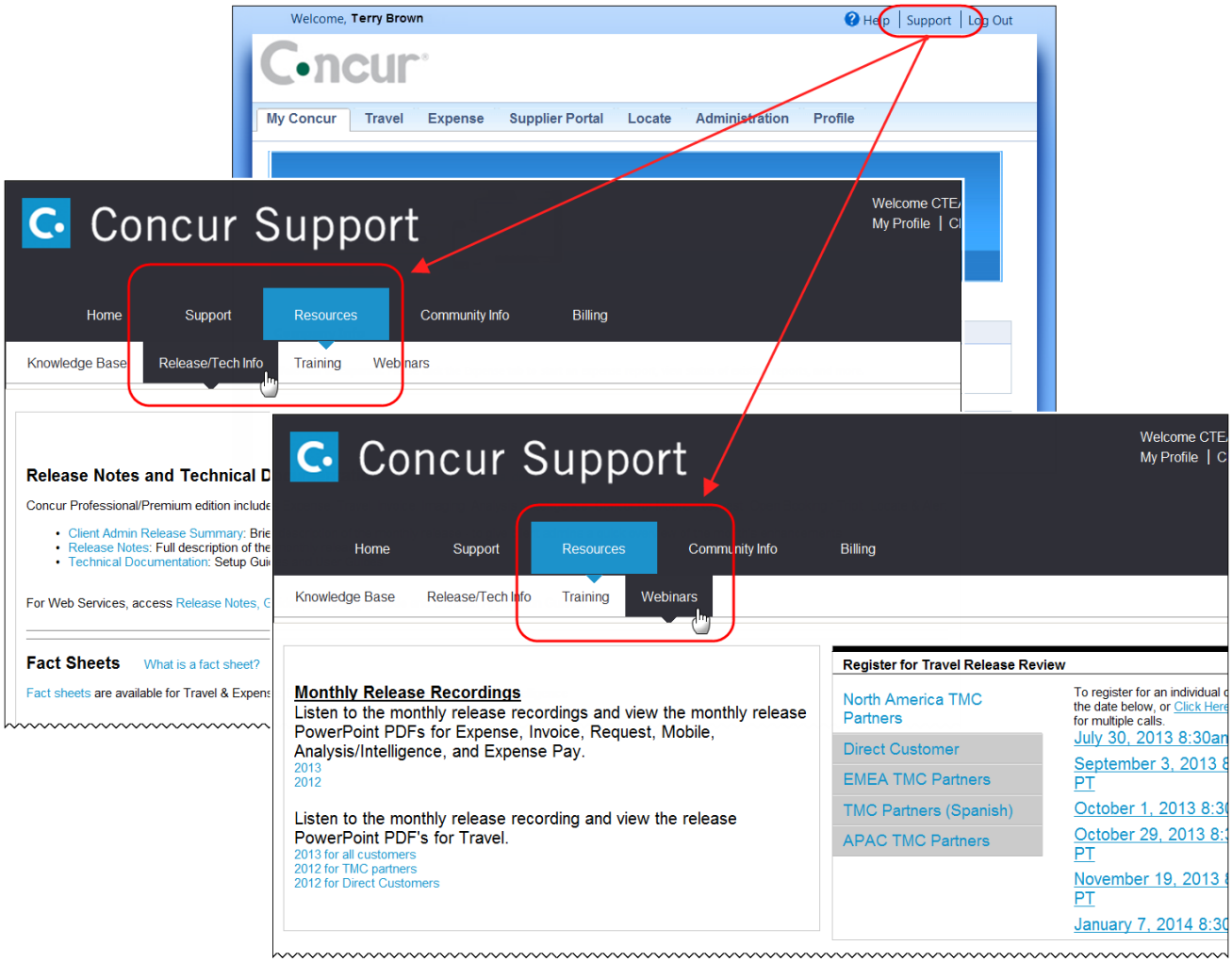

NOTE: If you use a user interface layout ***other than*** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

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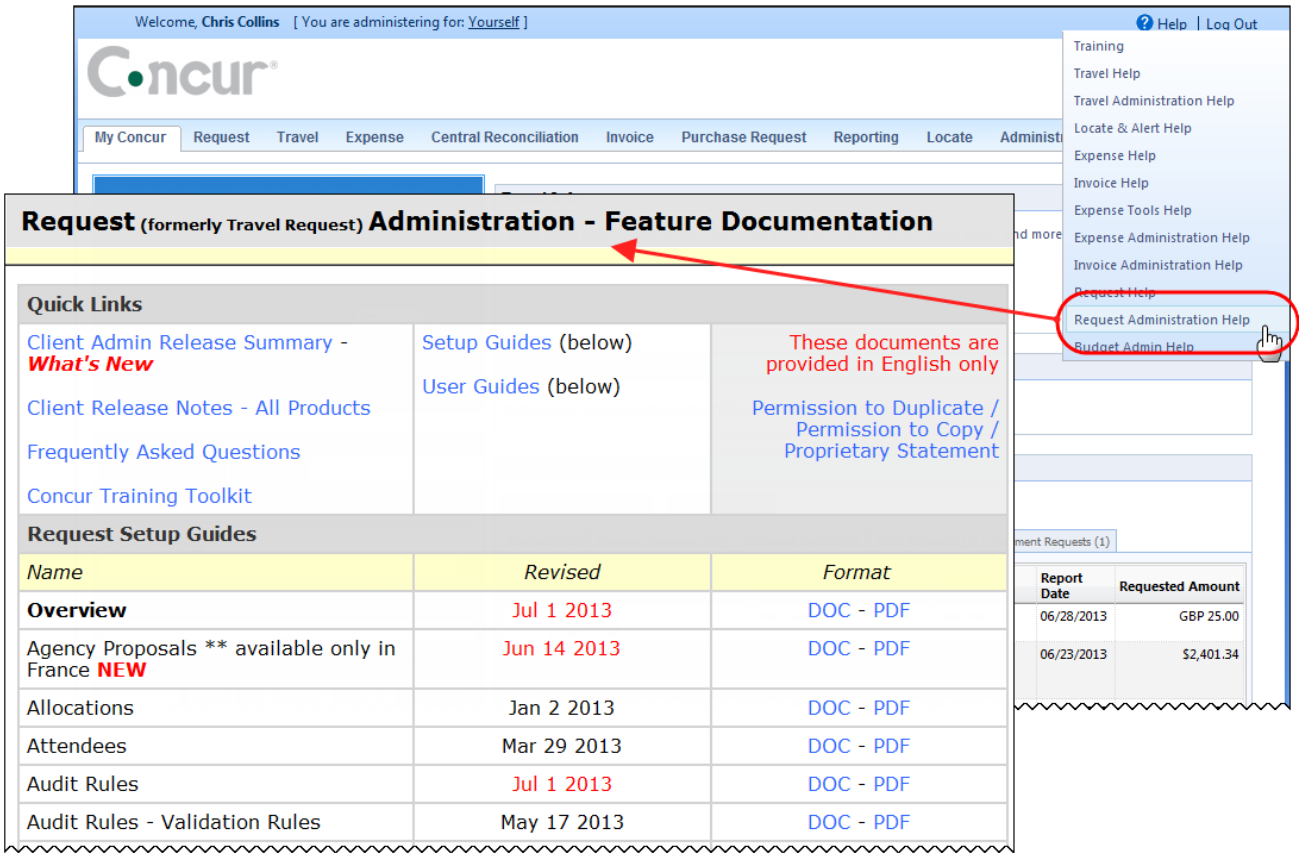


Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
October 2013 Update #1: Thursday, October 24, 6:00 PM PT	Client - FINAL

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The major features are:

- Online/Offline policy enforcement feature
- Booking source available in rules
- Integrated with Risk Management – Configurable starting risk level

Release Notes

Online/Offline Policy Enforcement Feature

Overview

This feature provides another option to allow clients to capture those cases where users – inadvertently or intentionally – bypass request-related travel policy, such as when a segment must be booked via Concur Travel instead of via an agency.

Note the following:

- This feature is available ***only*** to clients who have integrated Concur Request with Concur Travel.
- This feature uses the evaluation criteria in the booking switch in Request, whether or not the booking switch is enabled (described on the following pages).
- Note that – for this feature – *offline* means "agency-booked via Concur Request" while *online* means "self-booked via Concur Travel."

Background – Booking Switch

Currently, if the booking switch is enabled, when the user completes the **Trip Search** panel (Travel Wizard) in Concur Travel and clicks **Search**, the booking switch evaluates the requested trip segments. Based on the client-defined criteria in the switch, it determines if segments must be self-booked by the user (via Concur Travel) or booked by an agent (via Concur Request). For example, the client-defined criteria might require that all trips to Afghanistan are to be agency-booked while all trips to Europe are to be self-booked.

In the case where the user is directed to Concur Request for agency-booked segments, the user can make some choices in Request that allow the user to, in effect, bypass or ignore the original booking switch criteria.

The New Enforcement Feature

Using this new feature, the system evaluates the trip data ***again*** when the user ***submits*** the request. It uses the booking switch criteria to determine if travel-related segments in the request should be self-booked (via Concur Travel) and, *if so*:

- A message appears, explaining to the user that he/she must book using Concur Travel.
- A request-level exception appears.

NOTE: The message is configurable using the Exceptions tool in Request. The exception code is OPOLSBON.

- The user is directed to Travel. If an itinerary has already been started, the user can add segments. If the booking has not been started, the user navigates through the Travel Wizard.

NOTE: The four system segment types – air, rail, hotel, and car – are evaluated to be booked in Travel. Trip data from these segment types is sent from Request to Travel. If/When changes are made to any of these types in Travel, the trip data is sent from Travel to Request, where the Travel trip data replaces the Request trip data.

- The user can now submit the request.

Since the enforcement feature re-evaluates when the request is submitted, any changes made to the request in an effort to bypass or ignore the original criteria are captured.

Comparison: Booking Switch and the Enforcement Feature

Note the following:

- The booking switch evaluates the trip when the user clicks **Search** in Concur Travel.
- The enforcement features evaluates the trip when the user clicks **Submit** in Concur Request.
- Both the booking switch and the enforcement feature use the criteria defined in the booking switch.

NOTE: Only the "main" segment – air on the **Flight** or **Air/Rail** tab; rail on the **Rail** tab; hotel on the **Hotel** tab; car on the **Car** tab – is evaluated against the booking switch criteria, which means the "main" segment determines how the entire trip is to be booked. For a complete explanation of the booking switch and criteria, refer to the *Authorization Request: Booking Switch Setup Guide*.

- The booking switch can be used with or without the enforcement feature.
- The enforcement feature can be used with or without the booking switch.

More detail is provided below.

Configuration Combinations

The various configuration options are described below.

Booking switch ON

As described previously, if the booking switch is enabled, the trip data is evaluated ***once*** – when the user clicks **Search** in Concur Travel. Then, based on the evaluation, the user is directed to Concur Travel or Concur Request, whichever is appropriate.

Enforce option YES or YES-Derogation allowed

If the **Enforce Offline/Online policy** field is set to *YES* or *YES-Derogation allowed*, the trip data is evaluated ***once*** – when the user clicks **Submit** in Concur Request.

Then:

- If the booking switch criteria indicates that the trip should be self-booked, then, for the **Enforce Offline/Online policy** field:
  - If *YES*, the user is directed to Concur Travel.
  - If *YES-derogation allowed*, a message tells the user that the request does not comply with company policy. The user can choose to go to Concur Travel or the user can simply submit the request "as is."
- If the booking switch criteria indicates that the trip should be agency-booked, the request is submitted "as is."

Booking switch ON; enforce option YES or YES-Derogation allowed

If the booking switch is enabled and if the **Enforce Offline/Online policy** field is set to *YES* or *YES-derogation allowed*, then the trip data is evaluated ***twice***:

- When the user clicks **Search** in Concur Travel
  – and –
- When the user clicks **Submit** in Concur Request

Then, the appropriate action is taken, based on the evaluation, as described on the previous pages.

Configuration

Booking Switch

The booking switch is configured in **Administration** > **Request Admin** > **Booking Switch** (left menu).

📖 Refer to the *Authorization Request: Booking Switch Setup Guide* for more information.

Online/Offline Policy Enforcement Feature

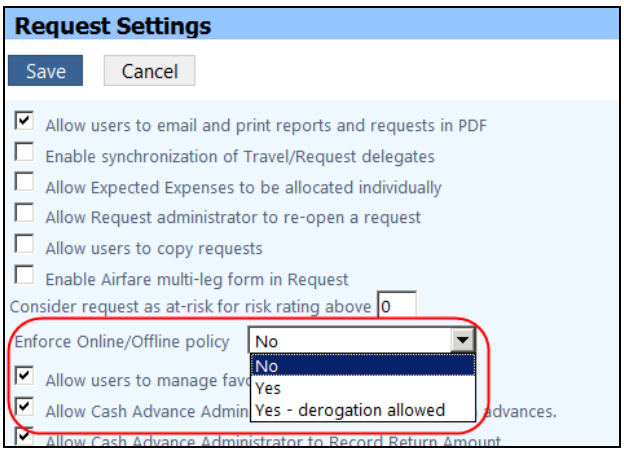
There are two parts to configuring the feature:

- Request site settings
  – and –
- Booking switch criteria

REQUEST SETTINGS

To configure Request Settings:

1. Click **Administration** > **Request Admin** > **Site Settings** (left menu). The **Request Settings** page appears.



2. In the **Enforce Online/Offline policy** field, select one of these:
   - No
   - Yes
   - Yes – derogation allowed

BOOKING SWITCH CRITERIA

As noted previously, the Enforce Online/Offline Policy feature uses the booking switch criteria whether or not the booking switch is enabled and whether or not the booking switch criteria is defined:

- If criteria is defined, it uses that criteria.
- If no criteria is defined, all requests containing travel-related segments (air, rail, hotel, and car) are evaluated as self-booked segments.

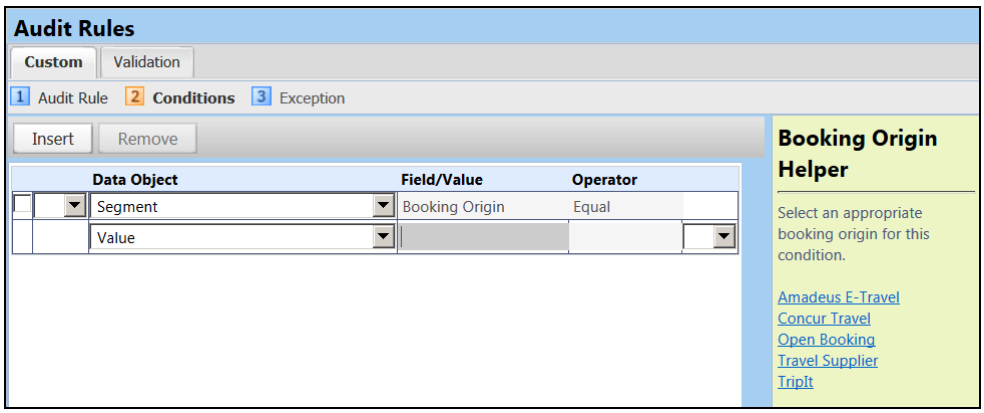
So, if you elect to define criteria, then refer to the *Authorization Request: Booking Switch Setup Guide*. If you elect to not define criteria, then no action is necessary.

Booking Source Available in Rules

Overview

With this release, you can create rules that apply to specific segment booking sources. For example, you can include/exclude segments from:

- Amadeus
- Concur Travel
- Open Booking – also known as TripLink
- Travel Supplier
- TripIt



This enhancement in rules applies to:

- Audit rules
- Validation rules
- Workflow step rules
- Processor queries

It does not apply to email reminders.

For more information, refer to:
- Authorization Request: Audit Rules Setup Guide
- Authorization Request: Audit Rules - Validation Rules Setup Guide
- Authorization Request: Workflows - General Information Setup Guide
- Authorization Request: Processor User Guide

In addition, the booking source will be included in the Request extract.

For more information, refer to the *Standard Request Extract Specification*.

Configuration

This feature is automatically on; no configuration is necessary.

Integrated with Risk Management – Configurable Starting Risk Level

Overview

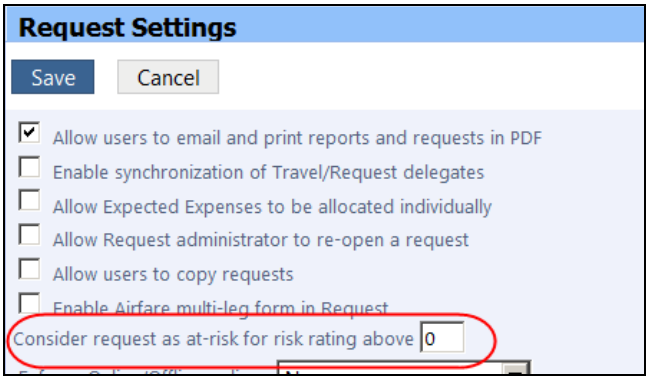
If the client is using Concur Risk Management with Concur Request, the client can now set the lowest risk level at which to display risk information to users. The default is set to zero but the client can, if desired, set the number to 1 through 6. For example, if the client set the number to 2, then the **Travel Advisory** tab will appear only for trips involving countries with risk level 3 or above.

For more information about using Concur Risk Management with Concur Request, refer to *Authorization Request: Risk Management Setup Guide*. For more information about Risk Management, refer to the *Concur Risk Management Setup Guide* and *Concur Risk Management User Guide*.

Configuration

To change the setting to a number other than zero:

1. Click **Administration** > **Request Admin** > **Site Settings** (left menu).
2. In the **Consider request as at-risk for risk rating above** field, enter the desired number.



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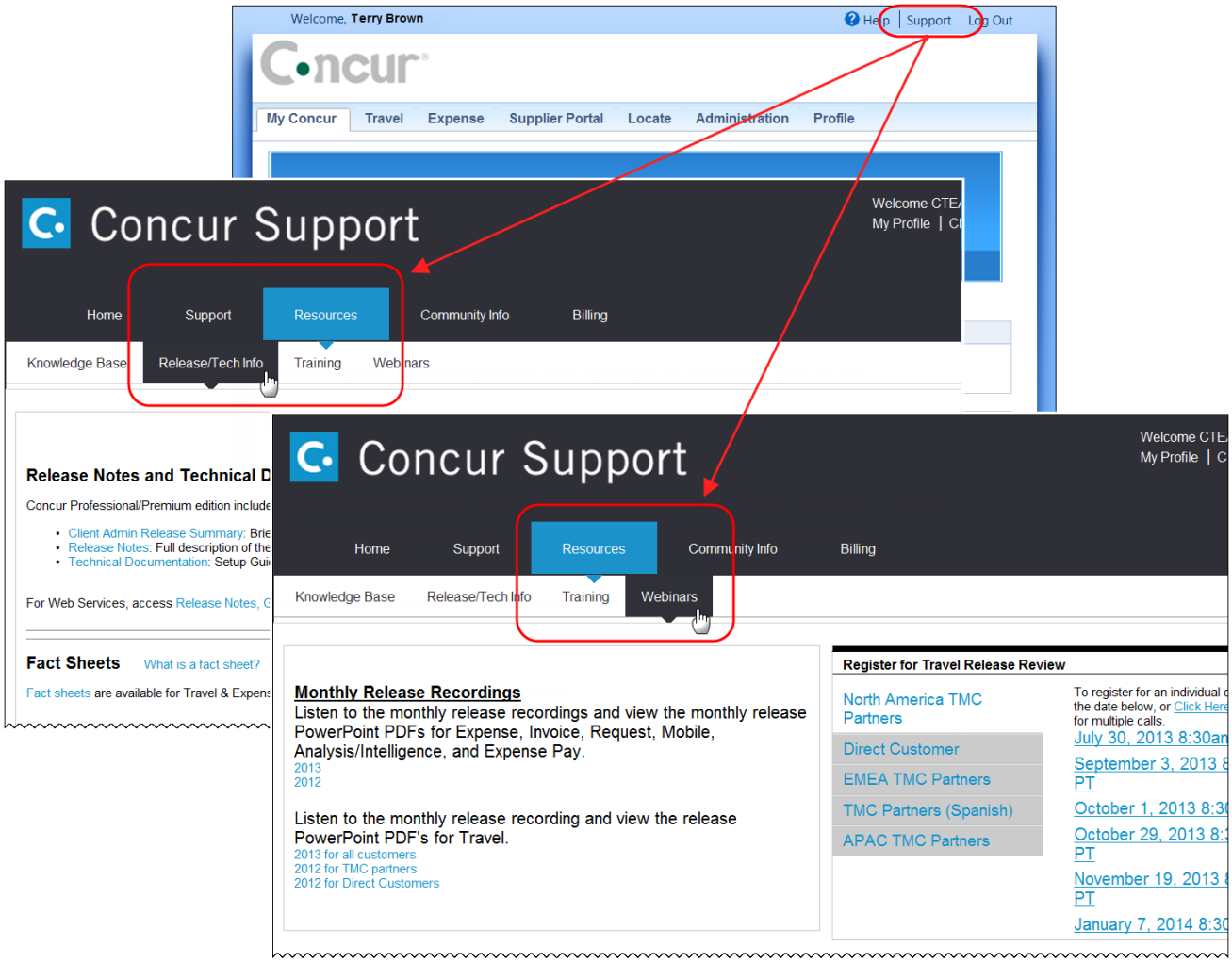

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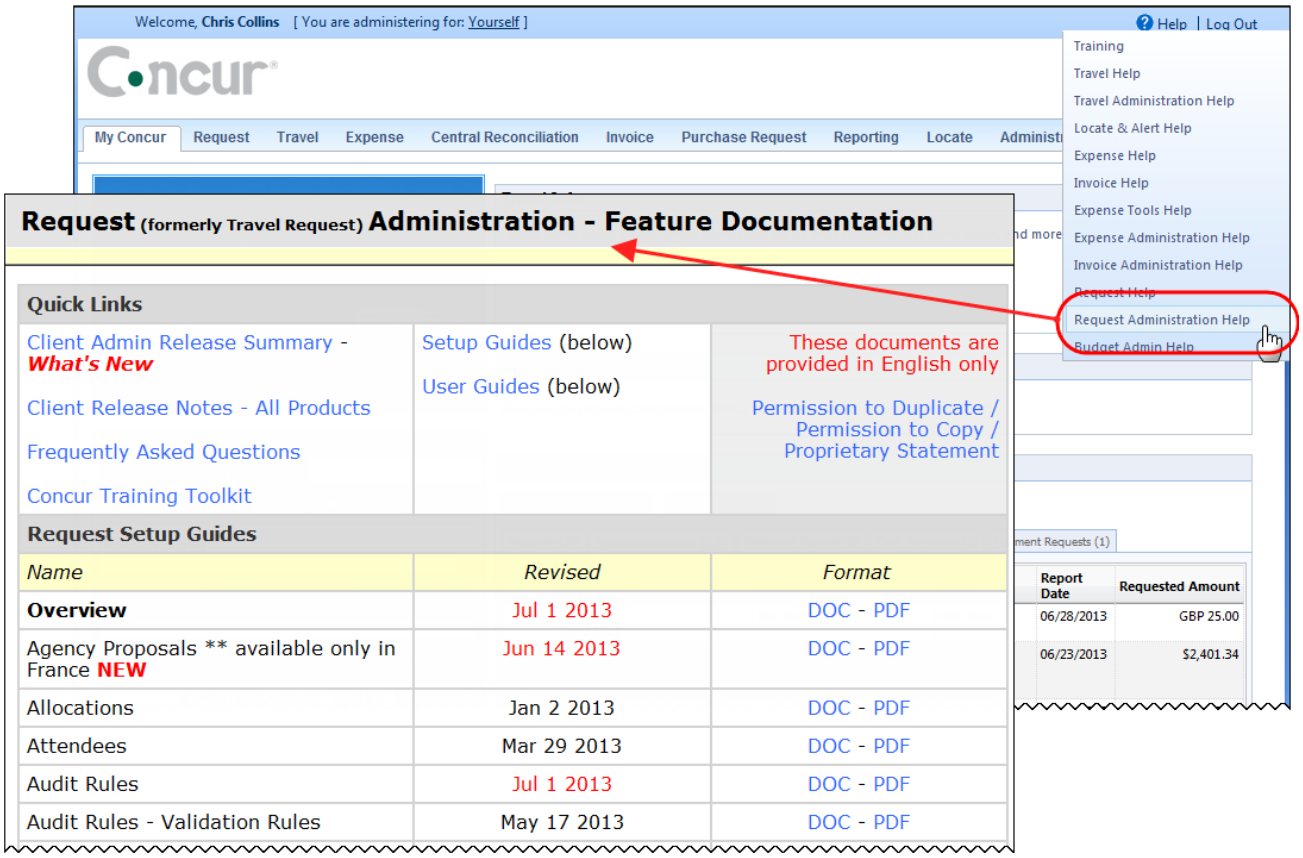


Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
November 2013 Update #1: Friday, November 08, 10:15 AM PT	Client FINAL

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The new features are:

- Audit rule option for overlapping requests
- Email reminders – updated HTML editor
- Validation rule setting
- Enhanced employee import
- Agency Proposals feature available to Carlson Wagonlit
- Integration with Risk Management – new risk referential

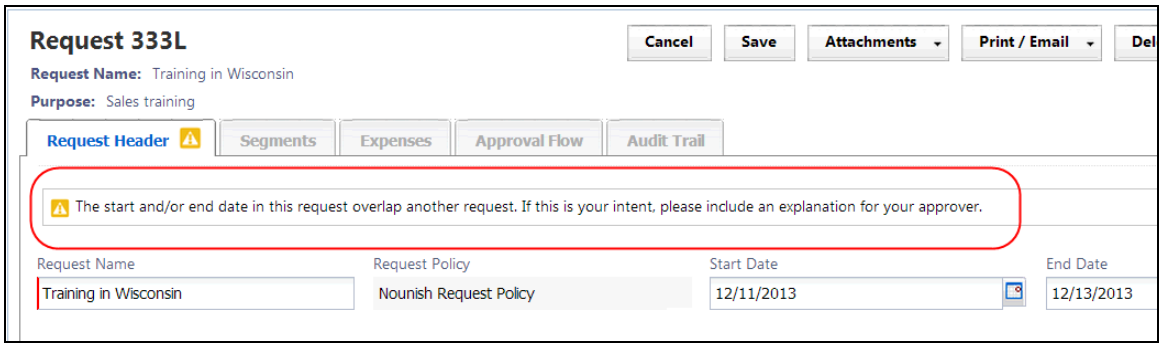
Release Notes

Audit Rule Option for Overlapping Requests

Overview

With this release, admins can create a custom audit rule using a new field – *Dates overlap another request* – to check for overlapping dates. Then, when the user saves a request – either while creating a new request or editing an existing request – Concur compares the date range on the current request with the date range on the user's other requests. If there is overlap, a message appears to the user.

In the sample shown here, assume that the user's existing Request A has a start date of December 9 and an end date of December 12. The user now creates Request B (shown below) with a start date of December 11 and an end date of December 13. When the user saves Request B, the audit rule runs and a client-defined warning message appears on Request B. The user then resolves the issue as per company policy.



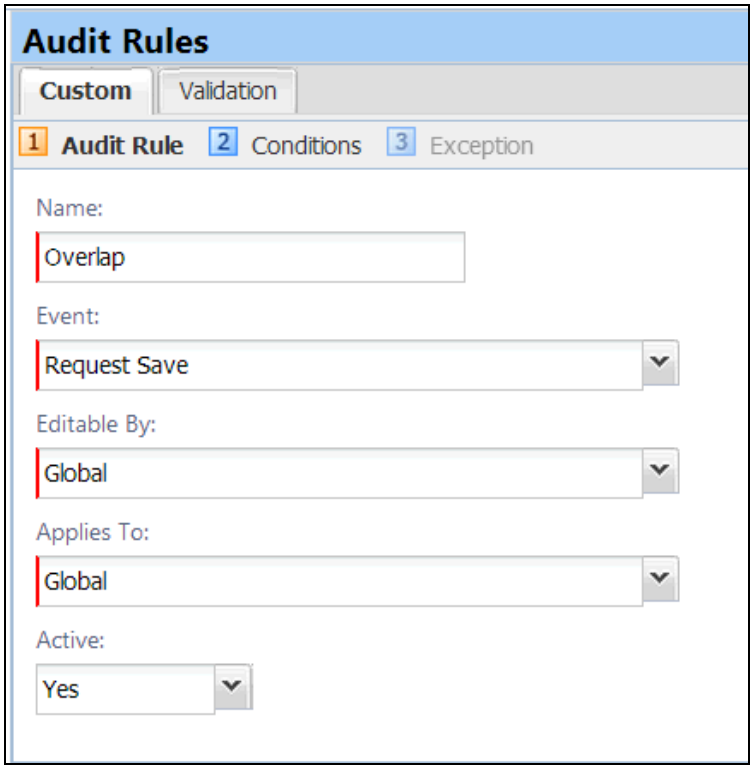
Like any custom audit rule, the admin can define the exception text, whether the violation of the rule allows or prevents submission, etc.

NOTE: The new *Dates overlap another request* field can also be used in validation rules and Request processor queries.

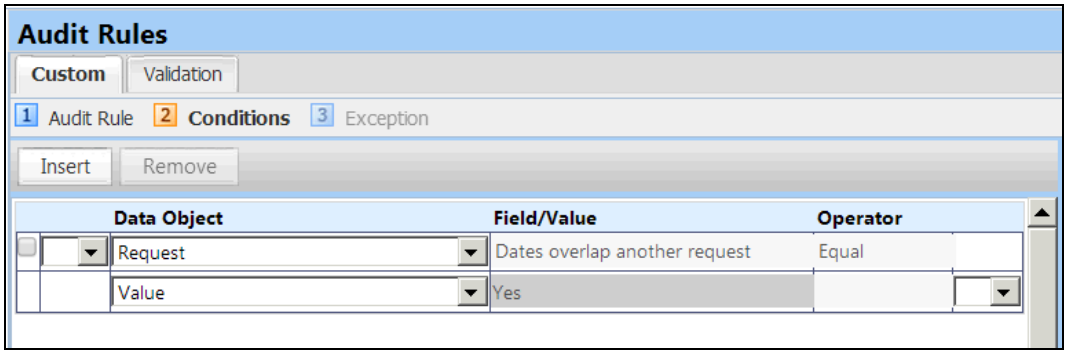
Configuration – Using the New Field

To use the new field, create a new audit rule in **Administration** > **Request Admin** > **Audit Rules**.

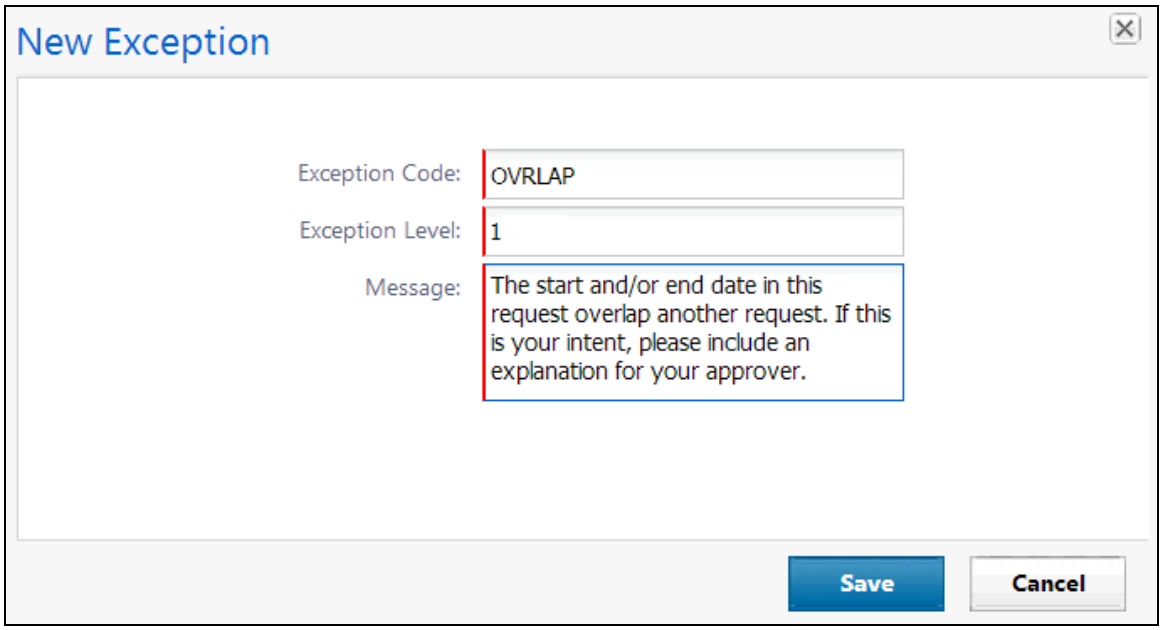
On the **Custom** tab, on the 1 **Audit Rule** step, use the *Request Save* event. Complete the remaining fields on this step as usual.



On the 2 **Conditions** step, use the *Request* data object and the *Dates overlap another request* field. Complete the remaining fields on this step as usual.



On the 3 **Exception** step, create a new exception. Like always, you can allow or prevent submission, define the message, etc.

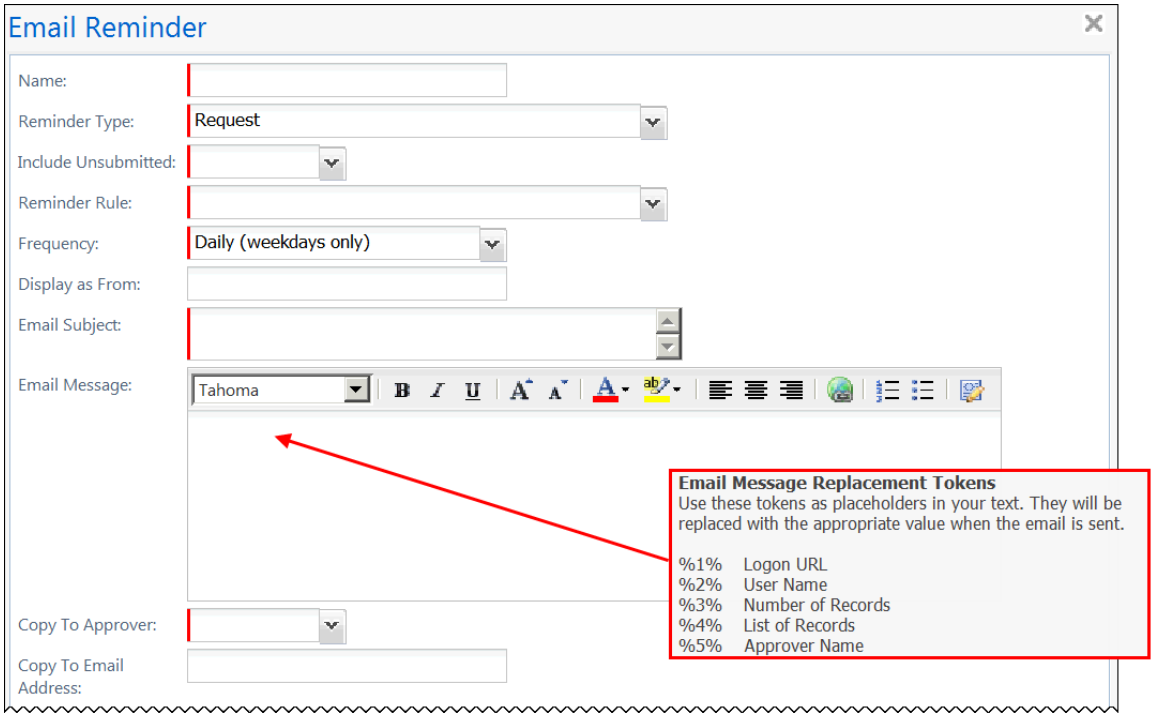


Email Reminders – Updated HTML Editor

Overview

Users of the Email Reminders tool can now prepare their custom reminder text using a new toolbar and helper pane. The toolbar is used when formatting HTML text in the body of the reminder email, and the helper pane acts as a quick reference when using replacement tokens in the message for names and URLs, as examples.

NOTE: For admins who have used the Email Notifications tool in Workflow, note that this new section in Email Reminders now matches Email Notifications.



To use this new feature, click **Request Admin** > **Email Reminders**. Then, create a new reminder or edit an existing one.

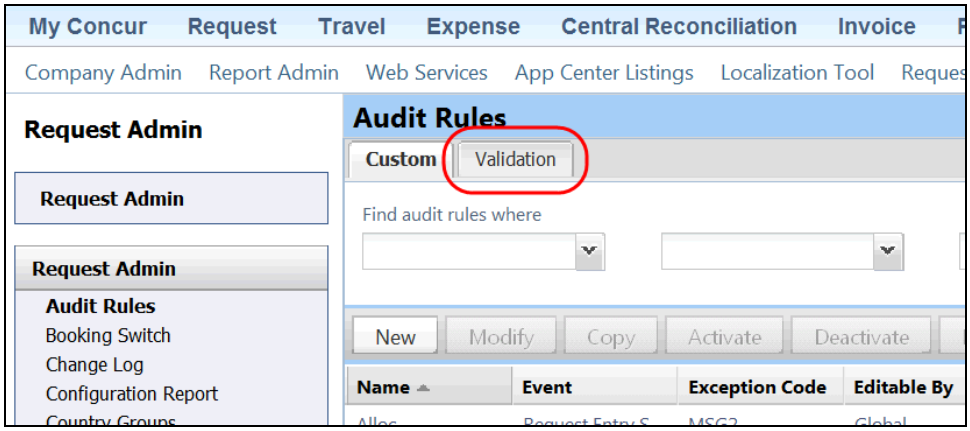
Configuration

No additional configuration is required to use this feature.

Validation Rule Setting

Overview

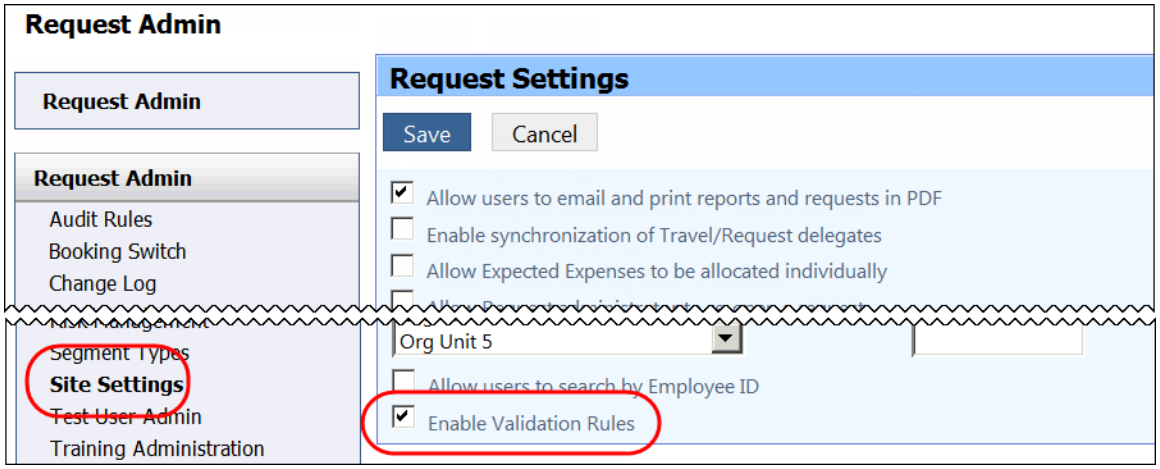
Validation rules (and the **Validation** tab) are available by default as part of the Audit Rules tool.



With this release, a new option in Site Settings allows an administrator to remove the functionality (and the tab) from Audit Rules.

Configuration – Using this New Setting

The new **Enable Validation Rules** check box is selected (enabled) by default.



So:

- For the client who does *not* use validation rules – the client can clear (disable) this check box to remove the **Validations** tab, to prevent any use of the validation rule functionality.
- For the client who currently uses validation rules and want to continue using validation rules – no action is necessary. The tab and feature will continue to work as usual.

Be aware that if/when the client clears (disables) this check box:

- The **Validations** tab is removed.
- The functionality is no longer available.
- Existing validation rules no longer run.

Enhanced Employee Import – Added 305 Record

Overview

With this release, a new employee import record set, *Enhanced Employee Importer*, has been added to the overnight employee import job. This new record set is at the 305 record level and includes identical records as those found in the 300-level records, with the addition of **Future Use** fields for flexibility in adding new fields in the future.

⚠ **IMPORTANT:** No change has been made to your current employee import; the existing feed file will continue to be supported *exactly* as before unless you choose to make a change.

Who should use the new enhanced employee import?

All clients who are using or will use the 300-level employee import records can use this new record set. Consider moving from the 300- to the 305-level record type if you find you have a reason to modify your HR feed to Concur.

Configuration

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

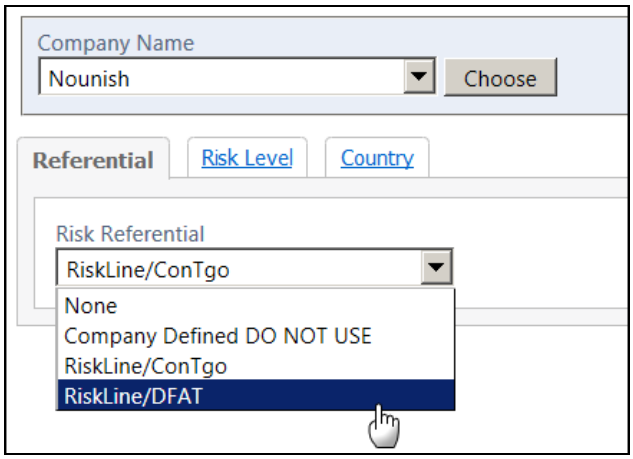
Agency Proposals Feature Available to Carlson Wagonlit

The Agency Proposals feature is now available for Carlson Wagonlit Travel in France.

📖 Refer to *Authorization Request: Agency Proposals Setup Guide* for more information.

Integration with Risk Management – New Risk Referential

With this release, there is a new option in the **Risk Referential** list.



The new option – RiskLine DFAT – provides the Australia's Department of Foreign Affairs and Trade (DFAT) content and RiskLine's risk ratings.

📖 Refer to *Authorization Request: Risk Management Integration Setup Guide*.

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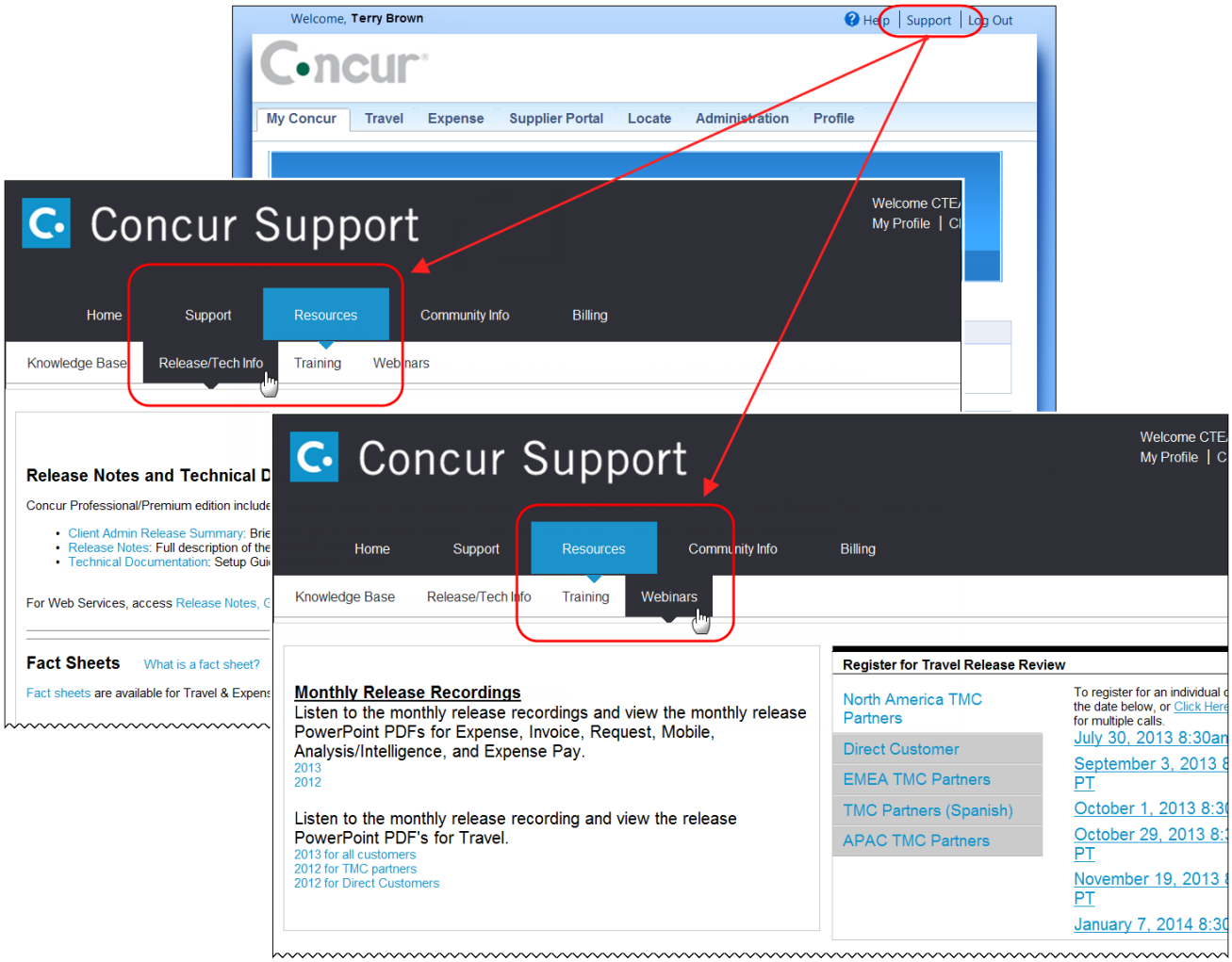
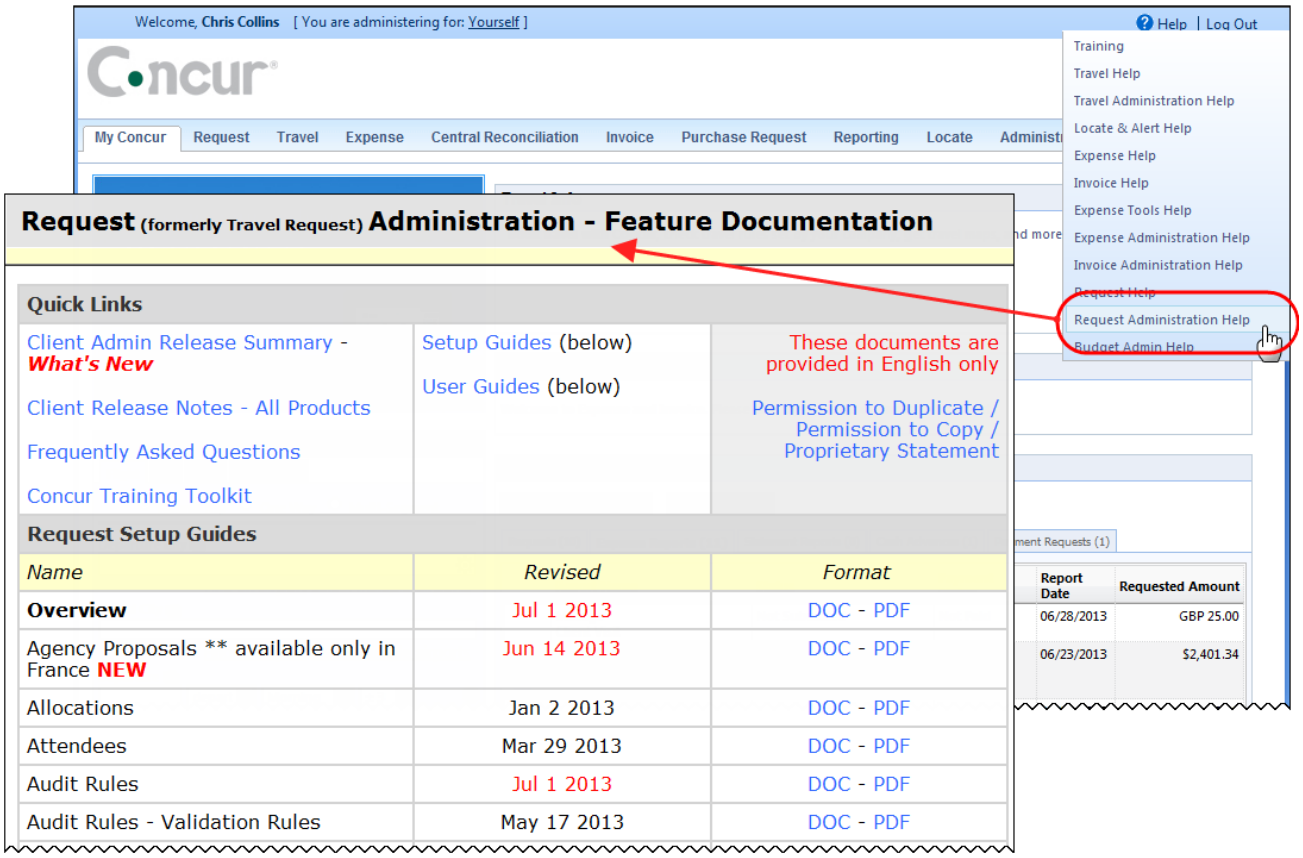


NOTE: If you use a user interface layout ***other than*** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

Online Help – Admins

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



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
December 2013 Initial post: Thursday, December 05, 1:00 PM PT	Concur - Client

Contents

Summary

IMPORTANT

This service is known as Authorization Request, Concur Request, or simply Request and was formerly known as Travel Request. Concur changed the name to better align with its broader capabilities.

This service is different from the *legacy* authorization request feature that was available within Concur Expense.

This Release

The new features are:

- Default Approver 2 available via import

Release Notes

Request Default Approver 2 Available Via Import

The second default approver was introduced in August. Until now, in those cases where the company allows each user to have a second default approver, the second approver was assigned by the User Admin. With this release, the second default approver can be included in both employee imports – the scheduled (overnight) import and the spreadsheet import (via Administration > Company Admin > User Administration).

For information about the second default approver, refer to the *Authorization Request: Workflow – General Information Setup Guide*.

For information about the "spreadsheet" import, refer to the *Shared: User Import User Guide*.

For more information about the scheduled (overnight) import, refer to the *Employee Import* chapter of the *Expense - Import and Extract File Specifications* guide.

Coming Soon Agency Proposal

Currently, the Agency Proposal feature is available only in France. Early next year, the Agency Proposal feature will be available to all TMCs in all countries.

These two features differentiate Agency Proposals from generic Concur Request:

- When the user submits a request, the request goes *first* to the travel agency. The travel agency provides up to three trip proposals, which are displayed on-screen to the user. The user chooses one of the proposed trips before submitting the request for approval.
- Communication between the agency and Concur is managed via XML, which requires synchronization between Concur Request and the agency's system.

The availability of Agency Proposals will be announced in an upcoming release.

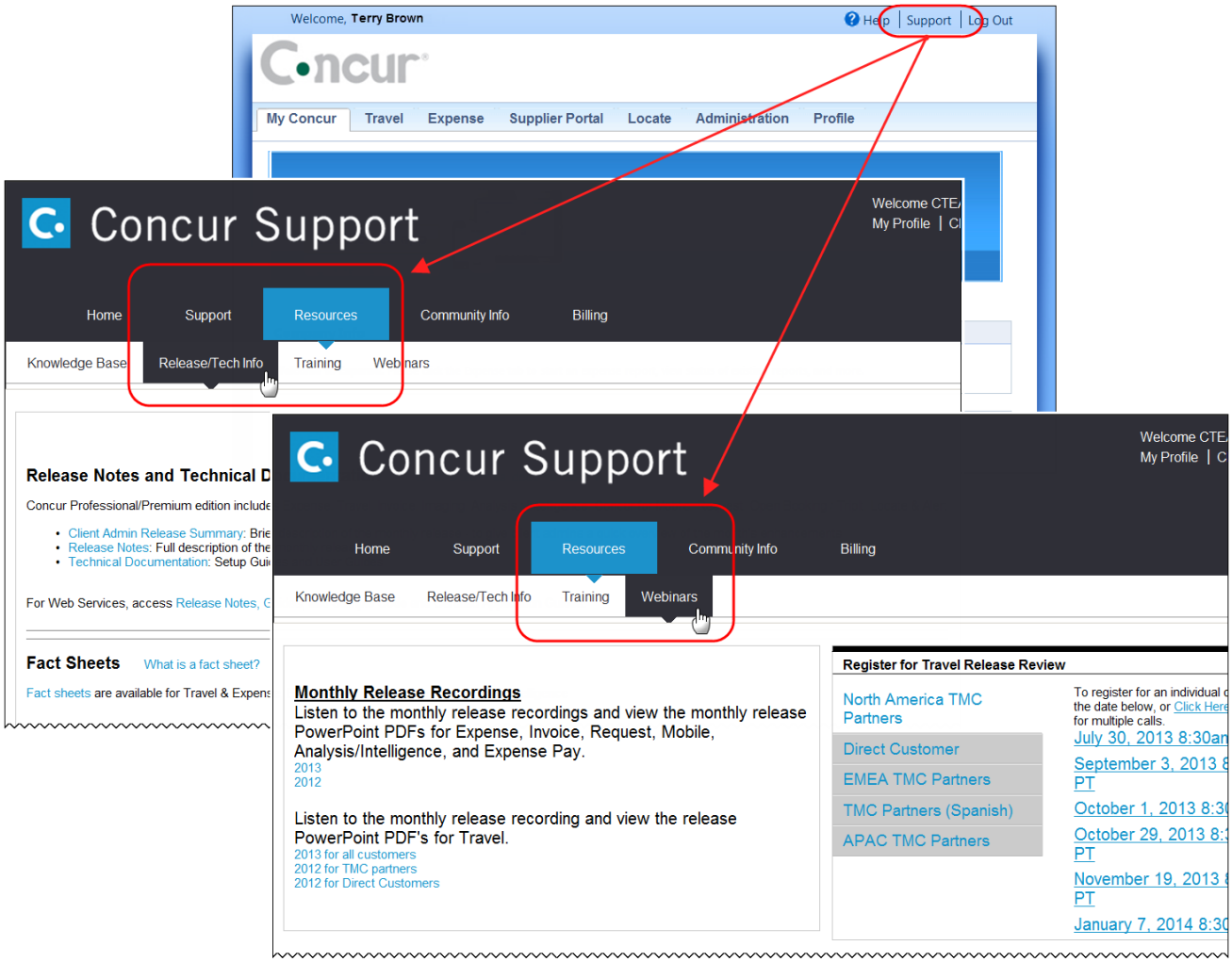
Additional Release Notes, Webinars, and Technical Documentation

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.



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