Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
January 2014 Initial post: Thursday, January 16, 4:30 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 new features are:

- New Feature: Concur Generic TMC Proposals (Concur Connect API)
- Images: HTML file format can be uploaded
- Workflows: Second default approver step can be configured to skip
- Printed Reports: Phone number and additional segment information can be included
- Email Reminders: New **Reviewed By User** option can be used to notify the user about requests that require attention
- Processor: Processor can edit the Comment field during the approver step
- Integrated with Expense: Define the relationship between the number of requests and expense reports
- Cash Advance: New forms and fields for cash advance
- Location Import: New fields for geocoding
- Locations: Substantial maintenance updates starting in January
- Agency-Managed Segments: Prevent automatic deletion of certain segments
- Company Info: Configurable by employee groups
- Localization: **Coming Soon** Change in German text

Internal-only enhancements:

- Forms and fields enhancements:
  - Add fields from the **Form Fields** tab
  - Forms no longer automatically collapse in certain scenarios
- Geocoding enhancements for clients integrated with Concur Travel

Release Notes

New Feature: Concur Generic TMC Proposals (Concur Connect API)

Overview

The new TMC Proposals feature is identical to the existing Agency Proposals feature ***except*** the TMC Proposals feature is not limited to France. It is available in any country, with any TMC, with any GDS.

The Concur Generic TMC Proposals feature works in conjunction with both Concur Request and Concur Connect. It allows the TMC to send multiple-itinerary, comprehensive options matching a traveler's needs. For example, the TMC may send the traveler two similar trip options to review and then choose from. The options (known as *proposals*) are reviewed easily by the traveler and also provide managers an accurate view of the details and costs. Meanwhile, the process between the TMC and the company are improved – thus reducing costs.

USER/CUSTOMER BENEFIT

This feature:

- Guarantees clear and complete requests, especially for the manager to approve
- Links the client pre-trip approval workflow with the offline booking process at the points-of-sale, to avoid manual recopy and unauthorized manipulation
- Harmonizes the offline travel requests process, while saving time for client/users
- In addition, this feature has also a primary value-add for clients around the globe. Indeed, either for multi-national companies or local companies, this feature can be used with any TMC and any GDS.

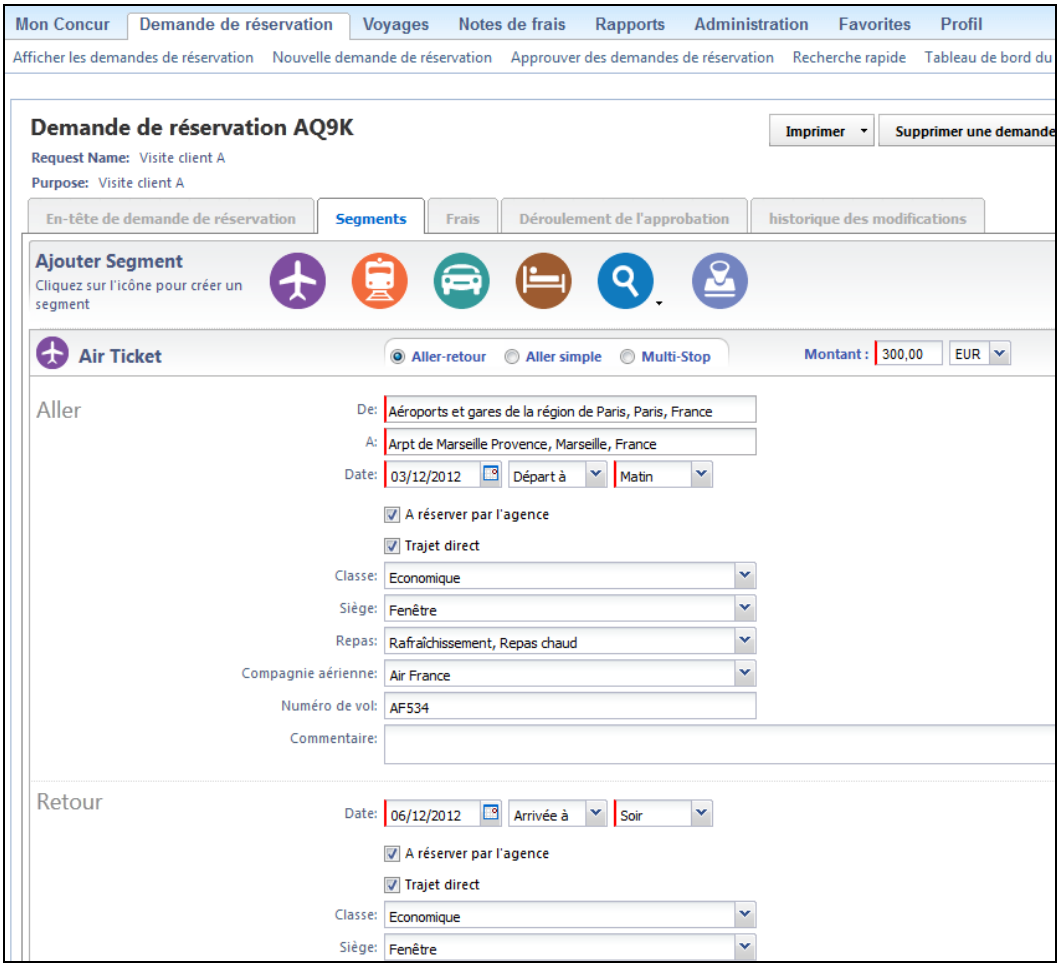
TMC BENEFIT

This feature:

- Optimized processes – there is no more email, there are more comprehensive requests, and there is less manual work from agents – thus reducing costs
- Technically superior for the TMC: real-time bi-directional feedback for a reliable integration
- Addresses the over 100+ TMCs around the world, with any GDS

How It Works / What the User Sees

1. The traveler creates a request (for travel) with the needed segments.



2. The traveler submits the request, which is routed to the TMC.

3. The TMC reviews the segment details of the request and creates one, two, or three proposed trips.

NOTE: None, part, or all of these proposed trips may actually be booked.

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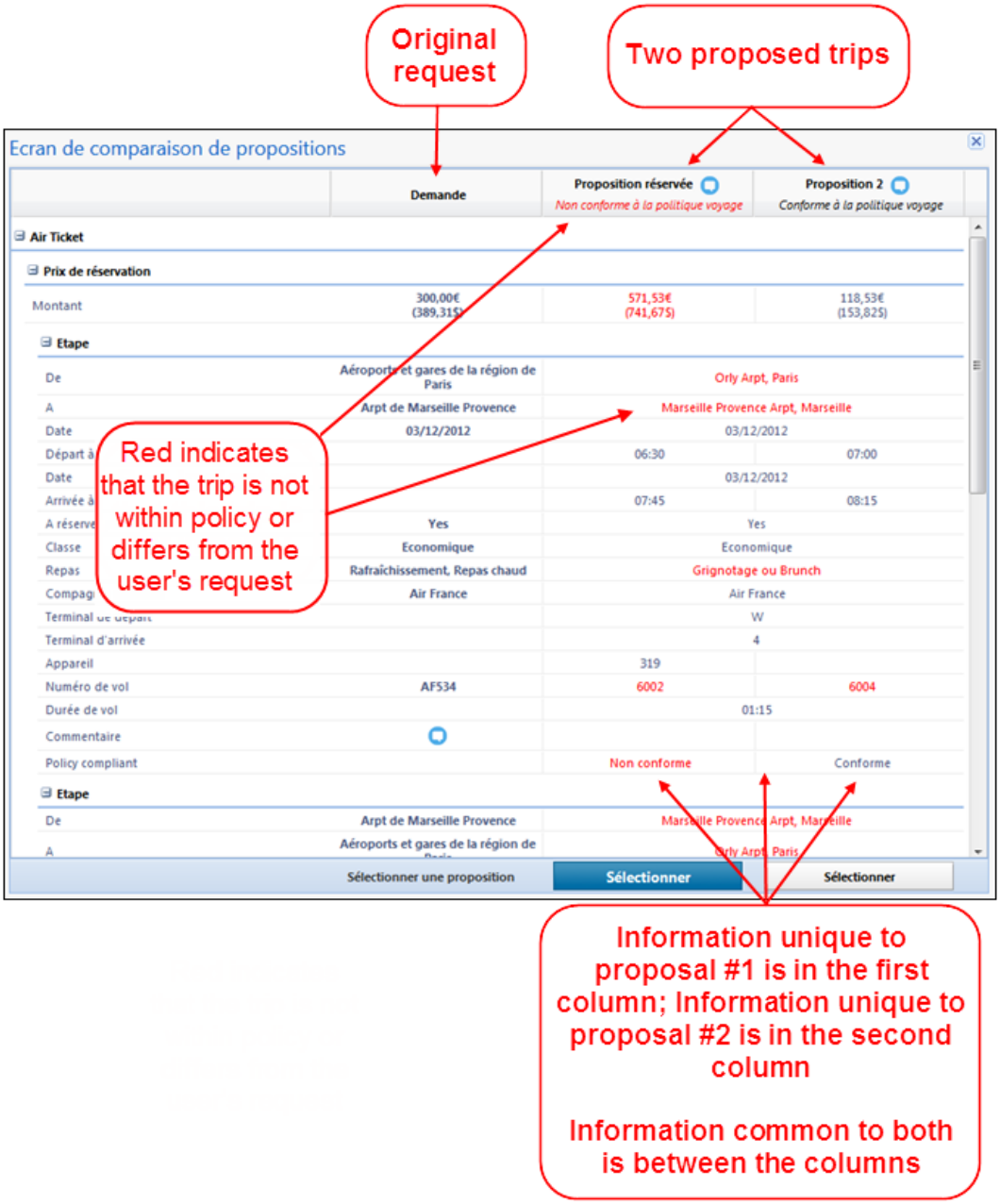
4. The TMC posts the proposals to Concur Connect, where they are parsed by Concur and then imported into the request.

5. The traveler is notified via email when the proposals are available for review.

6. The traveler reviews, compares, and selects his/her preferred proposal.



7. When the user selects the desired option, the request is routed to his/her approver.

8. Approved requests are routed to the TMC.

9. The TMC issues the tickets for the selected proposal.

10. The TMC optionally posts the booked trip, as a Confirmation, in its "tickets issued" state.

Configuration/Feature Activation

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

Concur will:

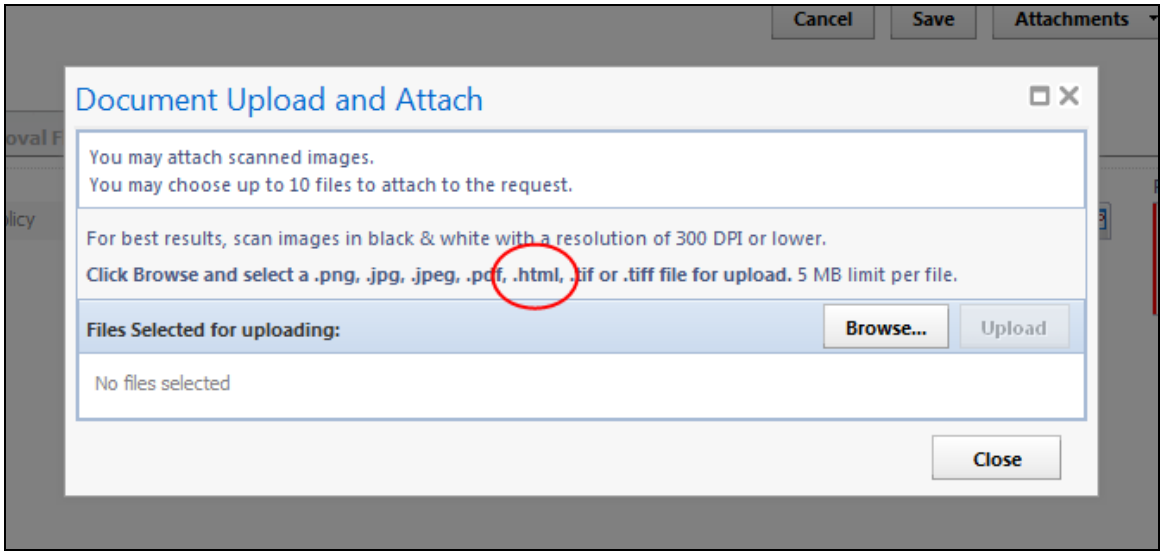
- Enable Concur Request
- Enable TMC Proposal with the associated workflow and forms
- Enable Concur Connect

📖 Refer to *Authorization Request: Agency Proposals Setup Guide* for complete details.

Images: HTML Available

Overview

Currently, HTML is not an acceptable file format for attached images. With this release, HTML files can be uploaded as attachments.



BUSINESS PURPOSE / CLIENT BENEFIT

Adding HTML as an acceptable attachment format makes the user experience more consistent across Concur products.

What the User Sees

The user will see HTML as an acceptable file format for attachments.

Configuration/Feature Activation

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

Workflows: Skip the Second Default Approver Step

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows clients to use the second default approver workflow and easily manage those times when there is no second default approver assigned – that is, the second default approver field in Profile is left blank either intentionally or accidentally.

What the User Sees

The user sees no difference.

Configuration/Feature Activation

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

Concur completes the configuration/activation steps shown below.

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

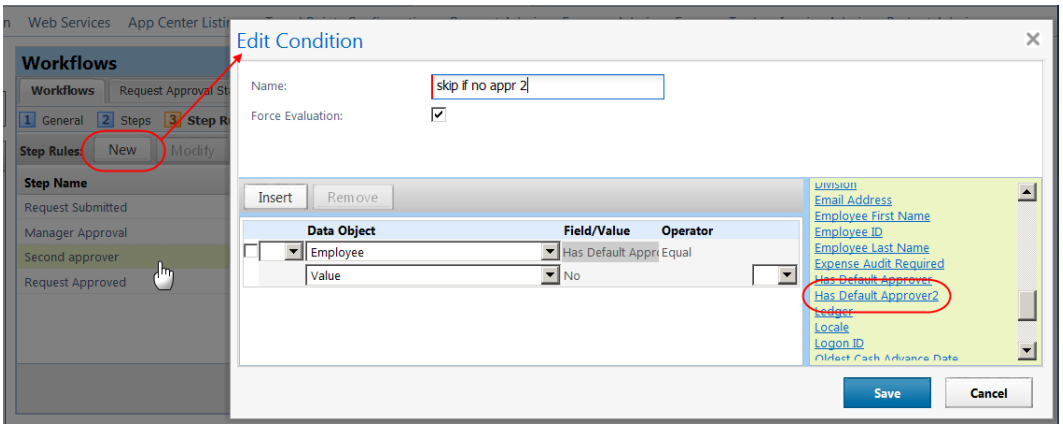
To configure the second default approver step:

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

   The **Workflows** tab appears.

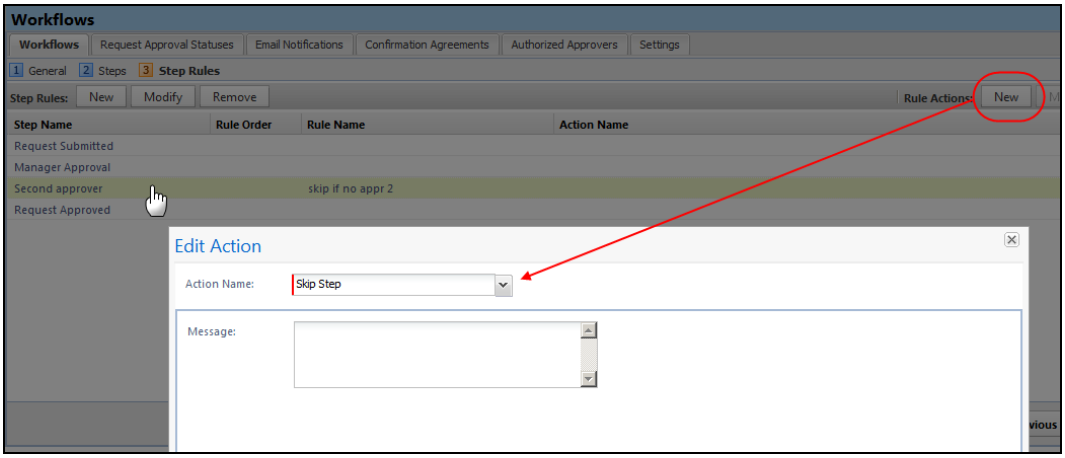
3. Click the 3 **Step Rules** step.

4. On the 3 **Step Rules** step:
   - Select the workflow step used for the second default approver.
   - In the **Step Rules** section, click **New**.



5. In the **Edit Condition** window:
   - Complete the **Name** and **Force Evaluation** fields as usual.
   - In the **Data Object** list, click *Employee*.
   - In the **Field/Value** list, click *Has Default Approver2*.
   - In the **Operator** list, click *Equal*.
   - In the **Field/Value** list, click *No*.
   - Click **Save**.

6. On the 3 **Step Rules** step:
   - Select the workflow step used for the second default approver.
   - In the **Rule Action** section, click **New**.



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

Printed Reports: Phone Number and Segment Information Available

Overview

Currently, the user's phone numbers (as displayed in the user's profile) have not been available in printed reports. Having the user's phone number available is helpful in those cases where the request details are sent via email to the agency and then the agency needs to contact the user for clarification.

With this release, the phone number fields are available in Printed Reports.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement makes it much easier for the agency and the user to communicate directly – especially in those cases where timing is important.

What the User Sees

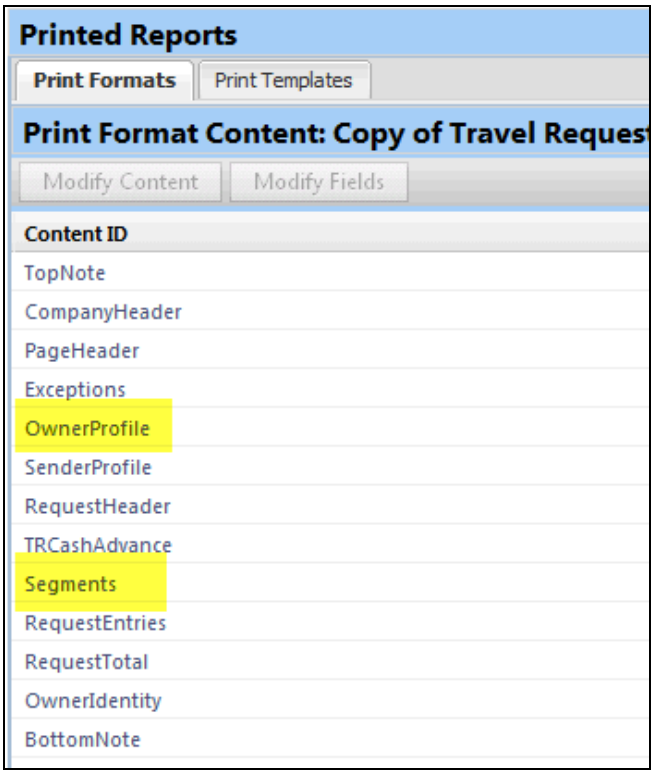
The user sees no difference.

Configuration/Feature Activation

To access the new fields for a printed report:

1. Click **Administration** > **Request Admin** > **Printed Reports** (left menu).
2. On the **Print Format** tab:
   - Click the desired report.
   - Click **Modify Content**.

   The **Print Format Content** page appears.

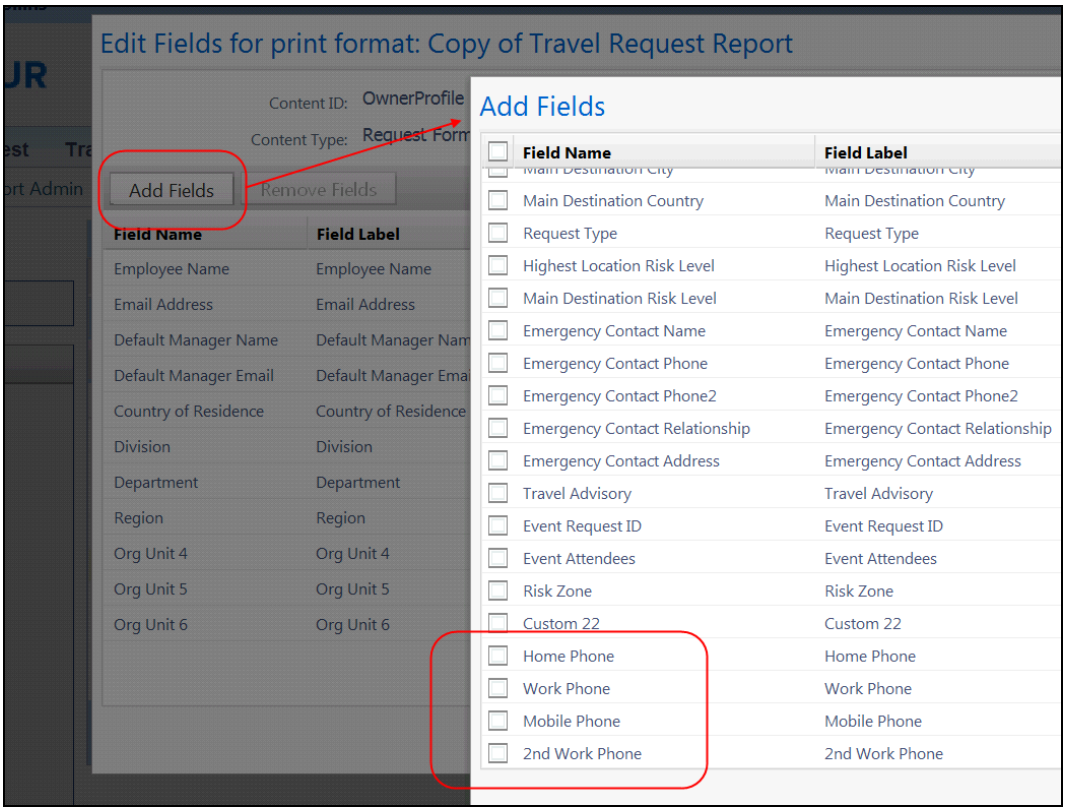


3. To access the new user phone number fields, on the **Print Format Content** page:

   - Click **OwnerProfile**.
   - Click **Modify Fields**.

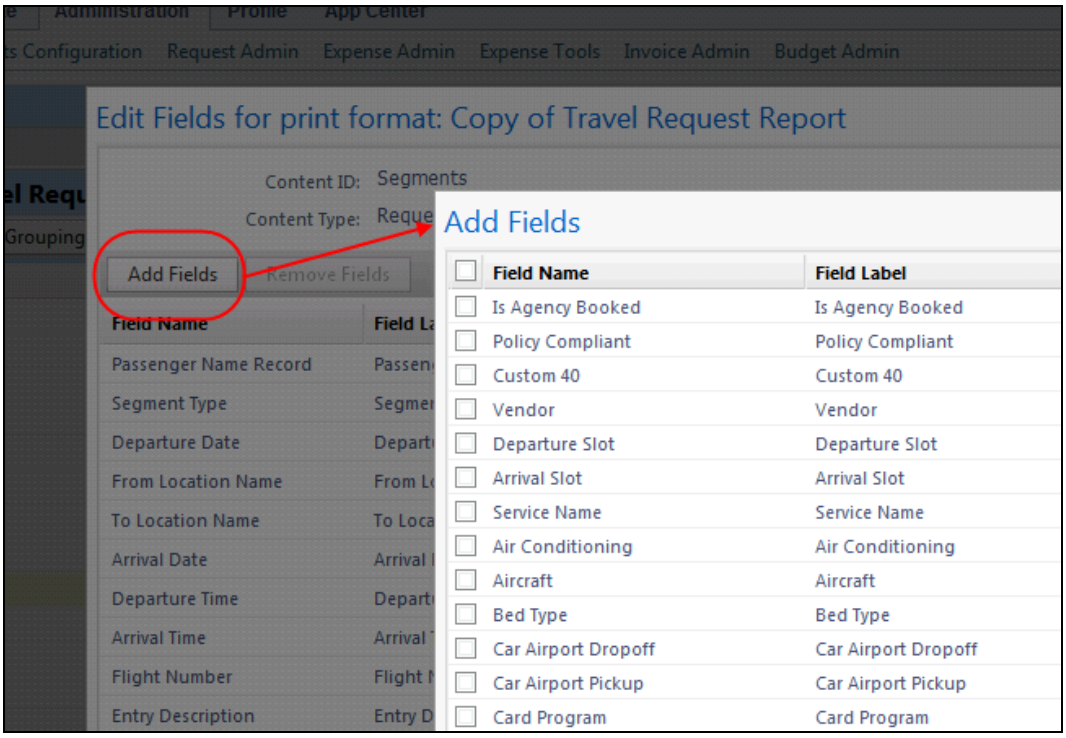
   Then, on the **Edit Fields for print format** page:

   - Click **Add Fields**. The phone number fields appear.
   - Select the desired fields and add as usual.



4. To access the new segment fields, on the **Print Format Content** page:
   - Click **Segments**.
   - Click **Modify Fields**.

   Then, on the **Edit Fields for print format** page:
   - Click **Add Fields**. The segment fields appear.
   - Select the desired fields and add as usual.



Email Reminders: New "Reviewed By User" Option

Overview

A request can enter a user's request queue from a source other than Concur Request, like Concur Travel or a web service. The associated Request user may not be aware of it.

With this release, the admin can create an email reminder with the new **Reviewed By User** option, which checks to see if a request has been opened by the user. If not, the reminder can be used to notify the user (also the approver and delegate, depending on the configuration) that there is a request that requires attention.

NOTE: The same **Reviewed By User** option – configured with Yes instead of No – can be used to differentiate user-created requests from requests initiated outside of Concur Request.

Business Purpose / Client Benefit

This feature allows users, who presumed their tickets were issued, to be reminded that the booking is pending approval via a request. If not reminded, they would either have to rebook with a higher fare or – even worse – arrive to the departure terminal only to find that they are not booked on the flight.

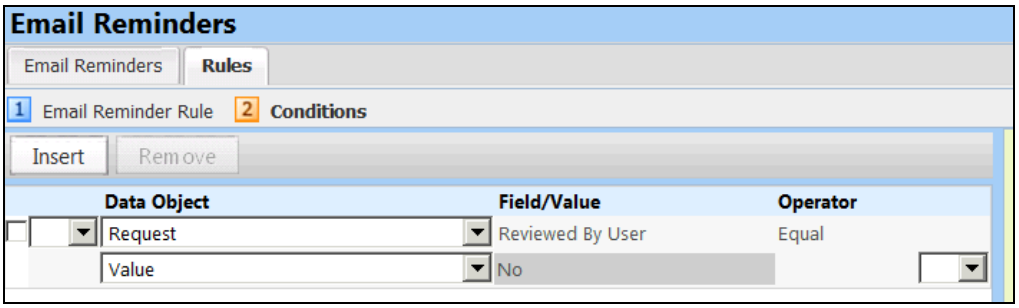
What the User Sees

The email reminder created with the new **Reviewed By User** option appears to the user like any other reminder.

Configuration/Feature Activation

To create an email reminder:

1. Click **Administration** > **Request Admin** > **Email Reminders** (left menu).
2. Click the **Rules** tab.
3. Click **New**.
4. On the 1 **Email Reminder Rule** step:
   - Enter the name and select the group(s) as usual.
   - In the **Reminder Type** list, click *Request*.
   - Click **Next**.
5. On the 2 **Conditions** step:
   - In the **Data Object** list, click *Request*.
   - In the **Field/Value** list, click *Reviewed By User*.
   - In the **Operator** list, click *Equal*.
   - In the **Field/Value** list, click *No*.



6. Click **Done**.

Processor: Comment Field Enhancement

Overview

Currently, if a request is in the approver's queue, the processor cannot add or edit a comment. With this release, the processor can add or edit the **Comment** field on a request while it is awaiting approval.

What the User Sees

The user sees no difference.

Configuration/Feature Activation

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

Integrated with Expense: 1-to-1 Relationship with Reports

Overview

With this release, a client can define whether a request can be associated with only one expense report, multiple expense reports, or no expense reports. The new **Assignable to Report** policy setting allows a client to select *None*, *One*, or *Unlimited* – indicating how many expense reports can be associated with a request.

NOTE: Some clients use requests for non-monetary purposes, such as requesting to use a corporate card, changing a limit on the corporate card, or attending internal training. In these cases, there would be no need for an expense report.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows clients to better define and control the relationship between requests and expense reports.

What the User Sees

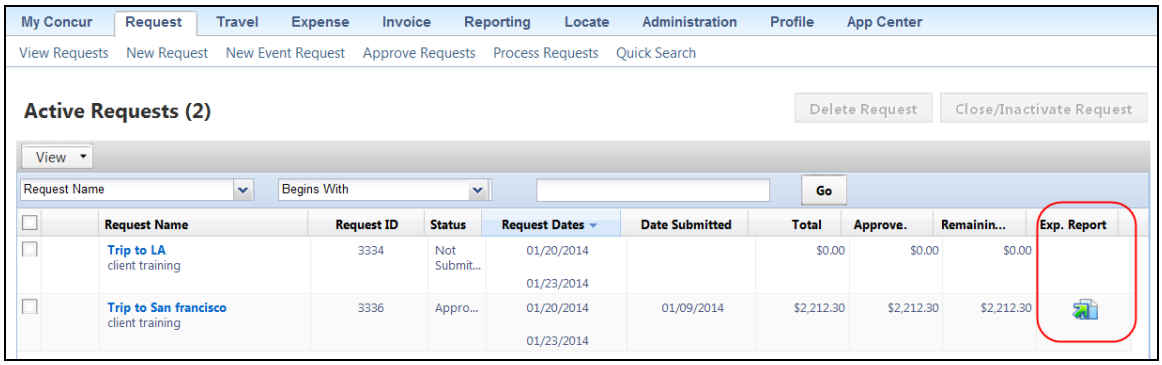
Users can associate requests with expense reports using:

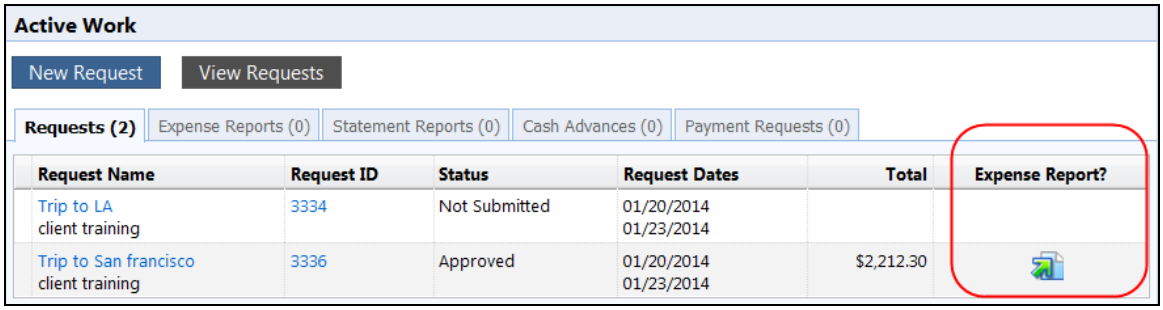
- The request list (**Request** > **View Requests**)
- The **Request** tab in the **Active Work** section of My Concur
- The **Available Request** window in an expense report

This new setting will change what the uses sees in these three places.

Request List (Request) and Active Work (My Concur)

Currently, in the request list and in the **Active Work** section, the icon appears when a request is approved and ready to be associated with an expense report.





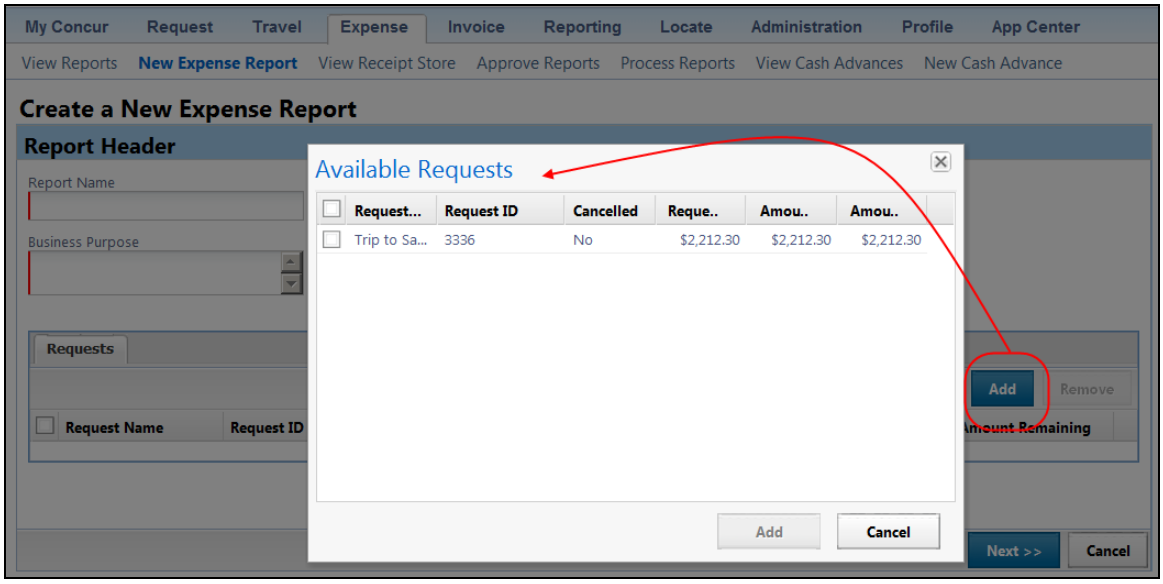
With this release, the icon appears if the request is approved ***and***:

- If the **Assignable to Report** policy setting is set to *Unlimited*
  – or –
- If the **Assignable to Report** policy setting is set to *One* and the request is not yet associated with another report

If the **Assignable to Report** policy setting is set to *None*, the icon never appears.

Available Request (Expense)

Currently, when creating or editing an expense report, the user clicks **Add** in the **Requests** section of the expense report header page. All available requests appear, ready to be selected by the user.



With this release, a request appears in this list if the request is approved ***and***:

- If the **Assignable to Report** policy setting is set to *Unlimited*
  – or –
- If the **Assignable to Report** policy setting is set to *One* and the request is not yet associated with another report

If the **Assignable to Report** policy setting is set to *None*, the request never appears in the list.

Delegates and Proxies

The setting also applies to delegates and proxies.

Configuration/Feature Activation

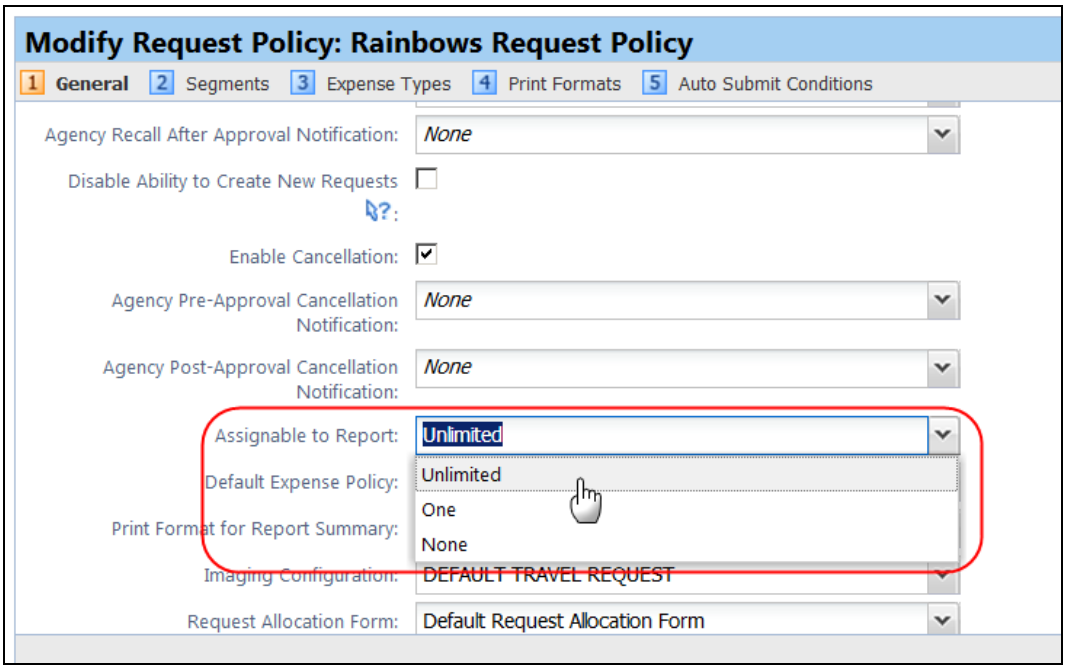
Clients who are interested in using this feature must contact Concur Client Support for assistance.

Concur completes the configuration/activation steps shown below.

To access the Assignable to Report field:

1. Click **Administration** > **Request Admin** > **Request Policies** (left menu).
2. Either:
   - Click the desired policy and click **Modify**.
     – or –
   - Double-click the desired policy.

   The **Modify Request Policy** page appears.

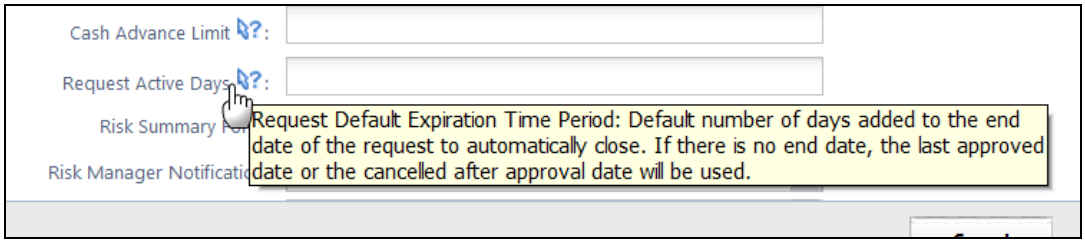


3. On the 1 **General** step, select one of these from the **Assignable to Report** list:
   - Unlimited
   - One
   - None
4. Click **Next**.
5. On the remaining steps of the **Modify Request Policy** page, click **Next** as many times as necessary and then click **Done**.

Configuration Tip – Assignable to Report is Set to None

For some types of requests, clients do not want users to associate a request with a report. For example, if the user is requesting to use a corporate card, changing a limit on the corporate card, or attending an internal training class.

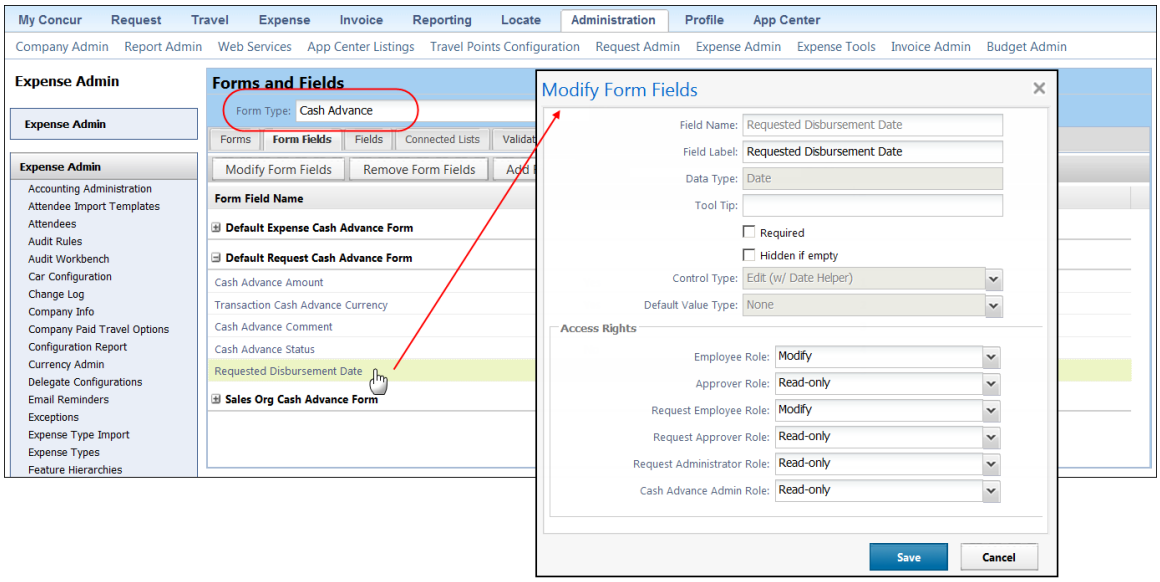
If this is the case, the client may want to have the request automatically closed immediately after the request end date. To do so, set the **Request Active Days** field (in Request Policies) to 1 so that the request is closed automatically 1 day after the request end date or after final approval.



Cash Advance: New Forms and Fields

Overview

Forms and fields used for cash advances in Request are configured in Concur Expense. With this release, in Expense, there is a Request Cash Advance form that can be modified with additional fields and field permissions.



For more information, refer to the Expense release notes for January or the *Expense: Cash Advance Setup Guide*.

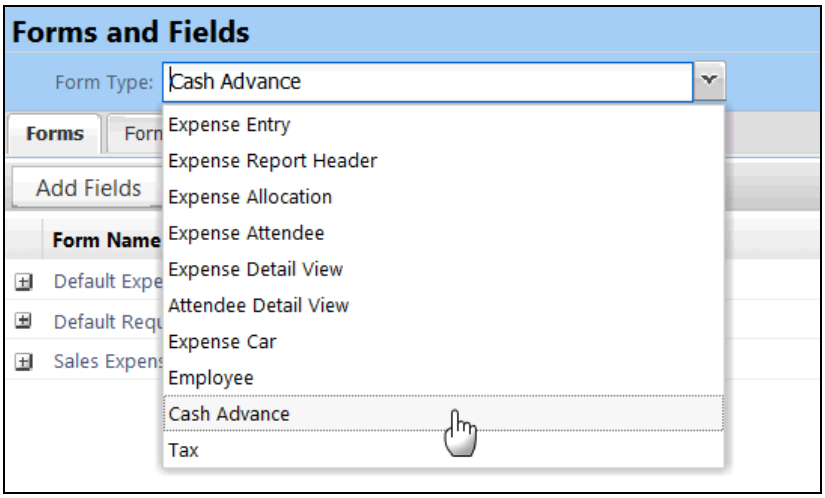
Configuration/Feature Activation

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

Concur completes the configuration/activation steps shown below.

To access the new forms and fields:

1. Click **Administration** > **Expense Admin** > **Forms and Fields** (left menu).



2. Click *Cash Advance* in the **Form Type** list and makes the desired changes.

Location Import: New Fields for Geocoding

Overview

Concur has enhanced the Location Import to include two new fields. The Record Types 220 and 230 have been updated to include the following fields:

- The **Future Use Field 3** is now the **Longitude** field.
- The **Future Use Field 4** is now the **Latitude** field.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement allows clients to supply geocoding information for custom locations.

Configuration/Feature Activation

Work with your Expense administrator to incorporate these fields into your Locations import feed/data file.

📖 Refer to *Chapter 2: Locations Import V2* of the *Expense – Import and Extract Specifications* manual for more information.

Locations: Maintenance Updates Starting in January

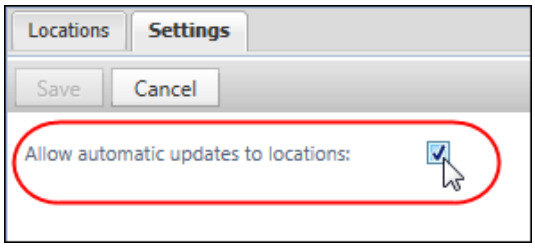
Overview

All clients who automatically receive Locations updates from Concur will see approximately 40,000 new locations added to the system ***between the January and February release dates (January 17 – February 7)***. Clients wishing to opt out of this maintenance update should disable the automatic update feature ***before*** this update is performed.

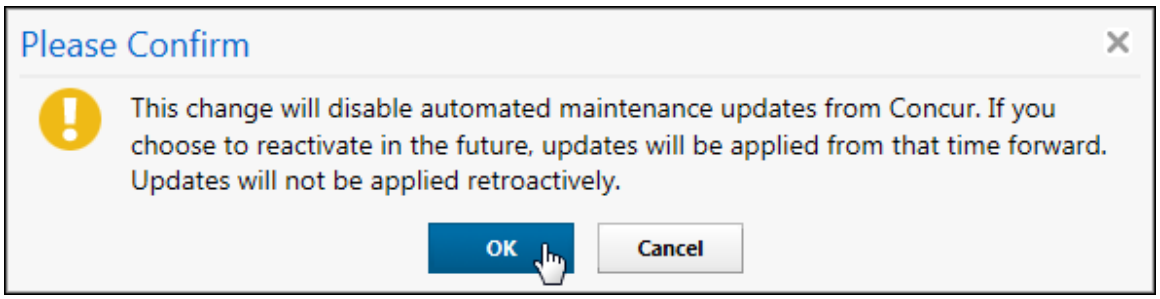
Important! - Update Site Settings to Prevent Addition of Locations!

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

To opt out of the automatic update, your company's Locations administrator should disable the **Allow automatic updates to locations** check box on the **Settings** tab in Locations (**Administration** > **Request Admin** > **Locations** on the left menu).



By clearing (disabling) the check box, location updates offered by Concur will not be accepted by your company – for this major update as well as any updates in the future. A confirmation message explaining this appears when you disable the setting.

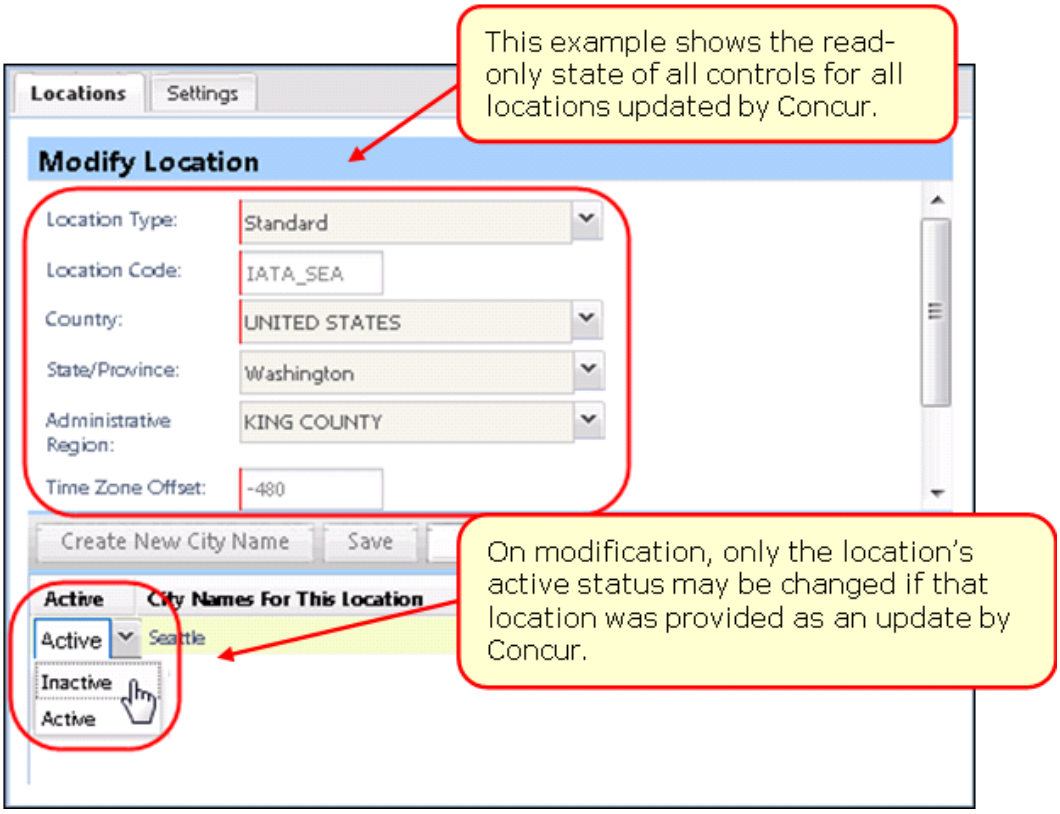


⚠ *Once disabled, it will be the responsibility of the client to maintain their list of locations. Further, Concur cannot retroactively identify and update location data for a client during the disablement period if the client elect to re-enable the setting: only changes going forward from the date the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

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

What the Admin Sees for Concur-Maintained Locations

The Locations admin has full functionality for those locations that he/she creates and manages. However, for locations included in the Concur location update, the admin will be restricted to selecting that location only for activation and deactivation. All other functionality for that location will unavailable. Import of changes for that location will not be permitted.



Frequently Asked Questions

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

Simply disable (uncheck) the locations setting so your company will not receive Concur updates for locations. (This setting has been available for the last 6 months, so you may have already done this.)

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

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

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

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

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

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

If you find that the name of a city used by your users is ***not*** included, you may contact Concur about adding the name to the list.

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

All locations modified by your company will be marked as client-specific, and will not be marked as Concur-maintained. No updates will be made to these records.

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

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

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

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

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

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

Configuration/Feature Activation

There are no additional configuration/activation steps.

Agency-Managed Segments: Prevent Deletion

Overview

Currently, Concur can receive updated request information:

- If the **Offline PNR Accepted in Request** setting is enabled in the Travel Agency Offices tool (**Administration** > **Request Admin** > **Travel Agency Offices**)
  – or –
- If the client accepts trip information from web services (APIs), for example, for the Agency Proposal feature

If so, when Concur receives an updated request from the agency, all agency-booked segments are deleted from the original request and are then replaced by the updated segments. These results are expected and reliable for standard segments such as flight, rail, car, and hotel.

There are segments, however, that are not meant to be pushed back in the retrieved itinerary or via web services – for example, Insurance or Visa. In order to support agency-managed services that are not meant to be pushed back, a new policy-level setting can be used to prevent these segments from being deleted by the update process.

So, using this new policy-level setting, the TMC will receive the proper request information and the segments will remain "as is" in the original request.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature maintains the consistency and accuracy of the request.

What the User Sees

For the user, certain segments that were automatically deleted are now present without any manual intervention.

Configuration/Feature Activation

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

Concur completes the configuration/activation steps shown below.

To access the new Excluded from agency update feature:

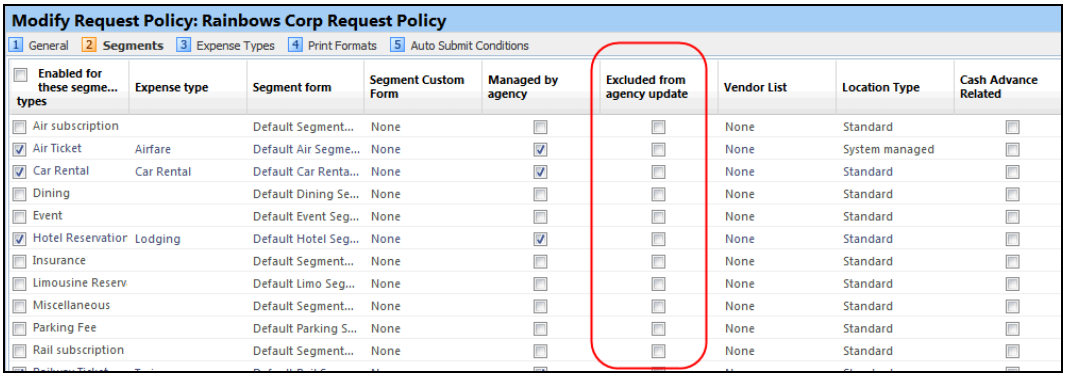
1. Click **Administration** > **Request Admin** > **Request Policies** (left menu).

2. Either:

   - Click the desired policy and click **Modify**.
     – or –
   - Double-click the desired policy.

   The **Modify Request Policy** page appears.

3. On the 2 **Segments** steps, select (enable) the check box in the **Excluded from agency update** column for each desired segment type, such as Insurance and Visa.



Enabled for these segme... types	Expense type	Segment form	Segment Custom Form	Managed by agency	Excluded from agency update	Vendor List	Location Type	Cash Advance Related
Air subscription		Default Segment...	None			None	Standard	
Air Ticket	Airfare	Default Air Segme...	None	✓		None	System managed	
Car Rental	Car Rental	Default Car Renta...	None	✓		None	Standard	
Dining		Default Dining Se...	None			None	Standard	
Event		Default Event Seg...	None			None	Standard	
Hotel Reservatior	Lodging	Default Hotel Seg...	None	✓		None	Standard	
Insurance		Default Segment...	None			None	Standard	
Limousine Reserv		Default Limo Seg...	None			None	Standard	
Miscellaneous		Default Segment...	None			None	Standard	
Parking Fee		Default Parking S...	None			None	Standard	
Rail subscription		Default Segment...	None			None	Standard	

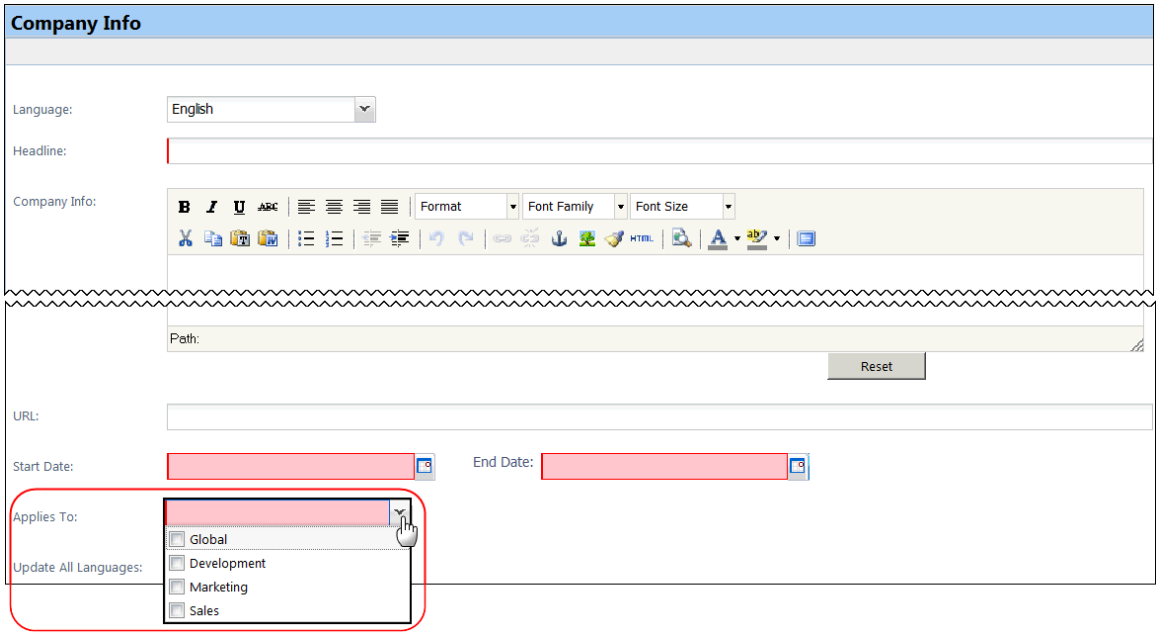
NOTE: The admin selects all segment types that the client wants the TMC to receive (via email), but that Concur will not receive back from the TMC because neither **Offline PNR Accepted in Request** feature nor the TMC Proposals feature support it.

Company Info: Configurable by Employee Groups

Overview

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

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



NOTE: The Company Info role remains a ***global*** role; only the postings to the **Company Info** area are enabled for groups.

BUSINESS PURPOSE / CLIENT BENEFIT

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

NOTE: On the release date, all existing messages will be automatically assigned to the Global group. If desired, after the release date, the admin can access an existing message and then assign it to one or more desired groups.

What the User Sees

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

What the Admin Sees

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

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

1. Click **Administration** > **Request Admin** > **Company Info** (center page).
2. Create the message as usual, as described in the *Shared: Company Info User Guide*.

3. In the **Applies To** list, either:
   - Click one or more groups.
   - Click *Global* if you want the message to be seen by all groups.

Configuration/Feature Activation

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

Localization: **Coming Soon** Change in German Text

Overview

Be aware that with the February release, the German text strings will be updated. The term for *Request*, which is currently *Anforderung*, will be changed to *Antrag*.

Configuration/Feature Activation

There are no additional configuration or activation steps.

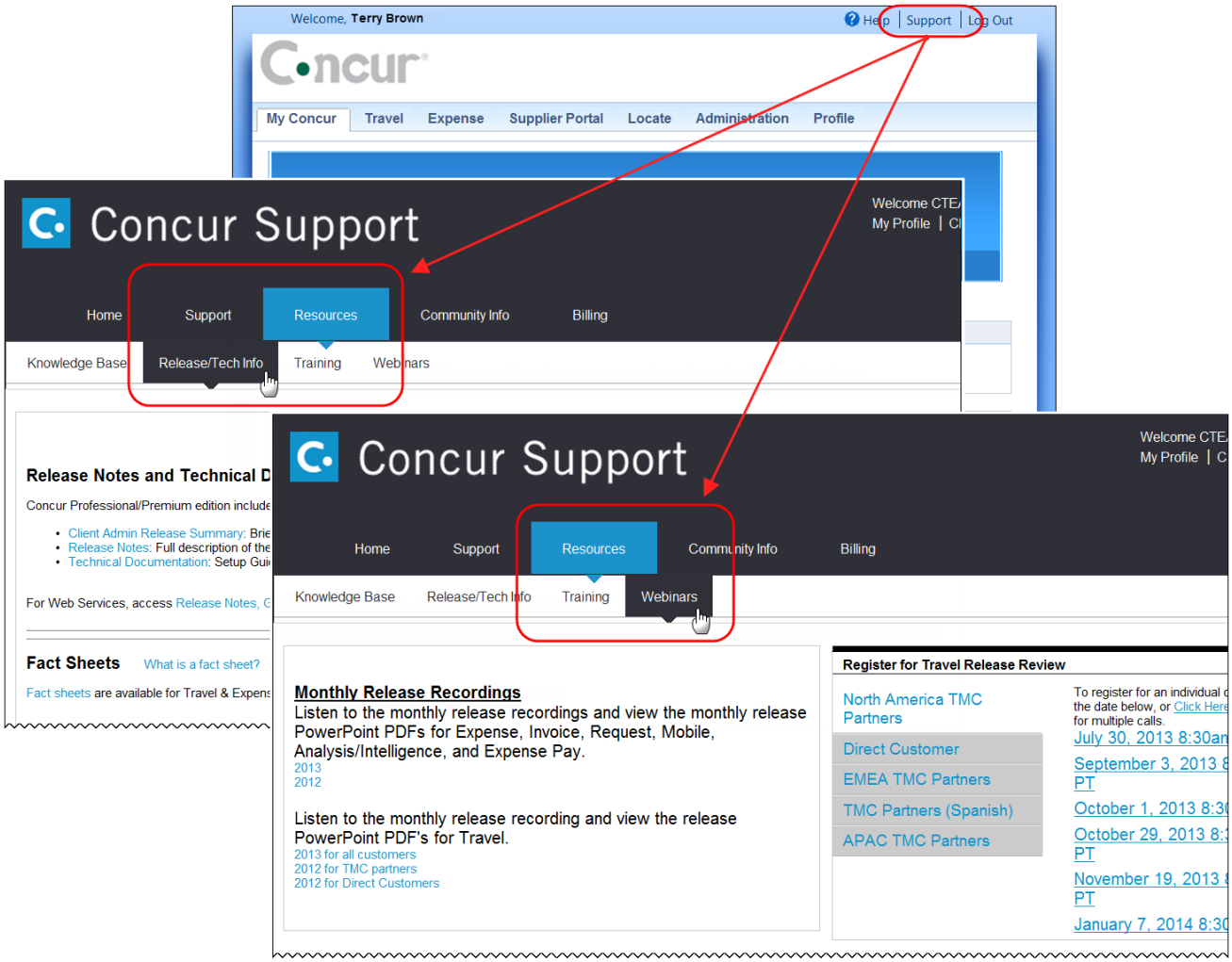
Additional Release Notes, Webinars, and Technical Documentation

Concur Support Portal

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

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

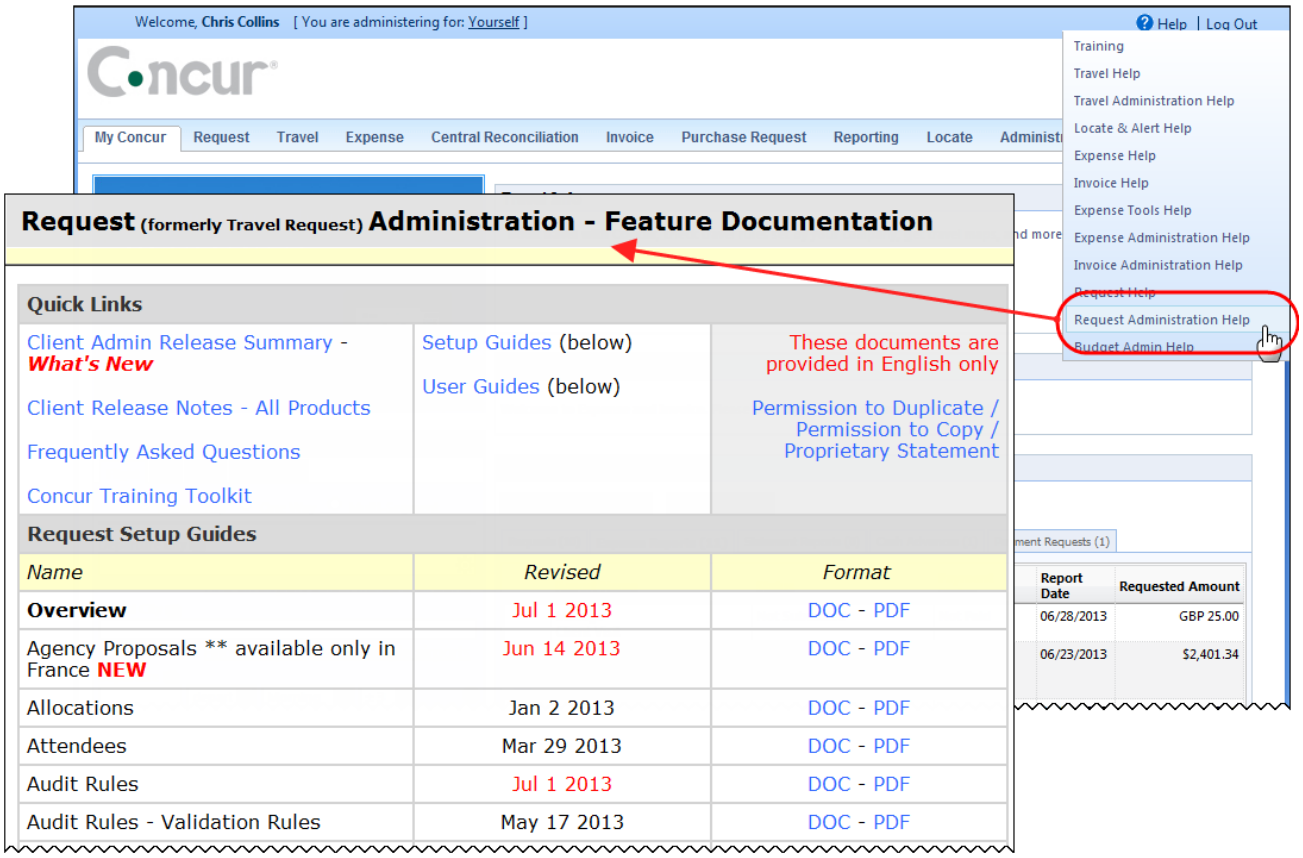
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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

Online Help – Admins

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



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
February 2014 Update #1: Friday, February 07, 2:30 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 new features are:

- Cities and airports now separate in the Locations tool
- Search feature now available in the Localization tool
- Localization – change in German text
- If integrated with Expense, the request can be viewed via cash advance in Expense

Release Notes

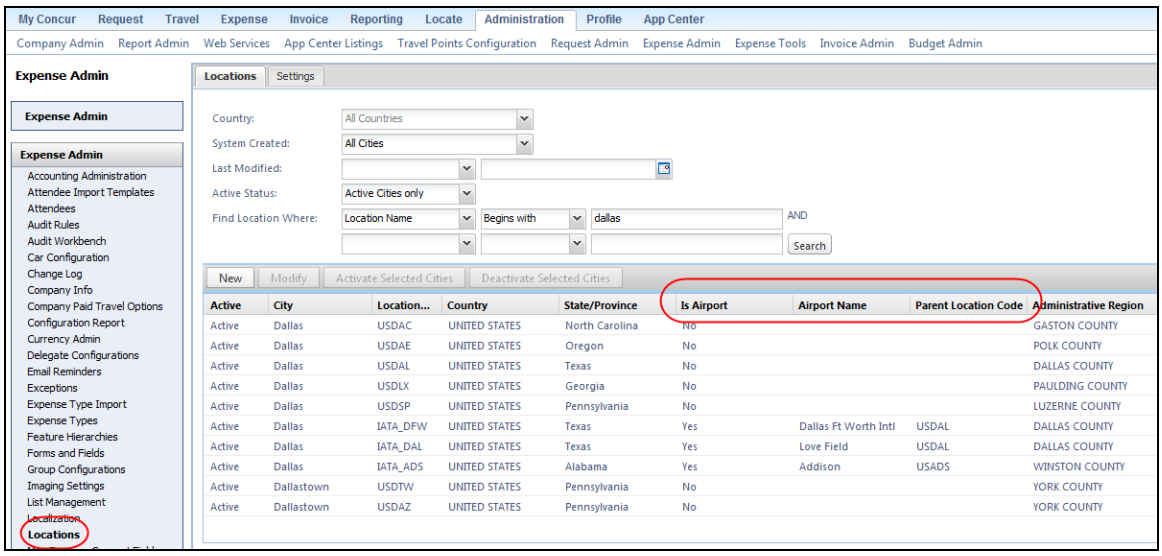
Locations

Separate City from Airport

Overview

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

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

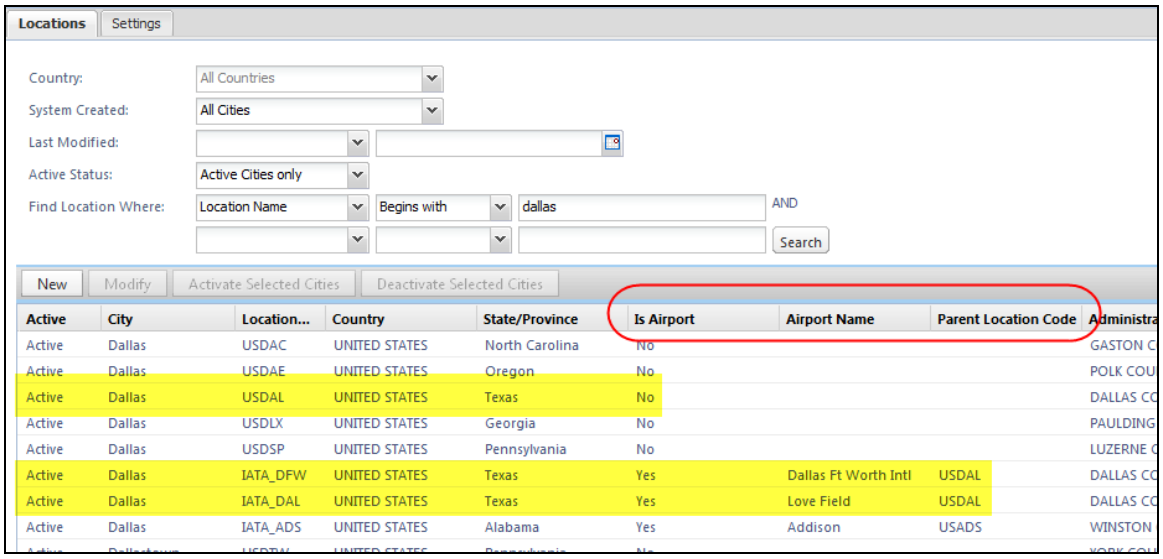


BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement makes it easier for clients to manage locations.

What the Admin Sees

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



In this example, note the following:

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

What the User Sees

The user sees no difference.

Configuration/Feature Activation

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

Localization

Change in German Text

Overview

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

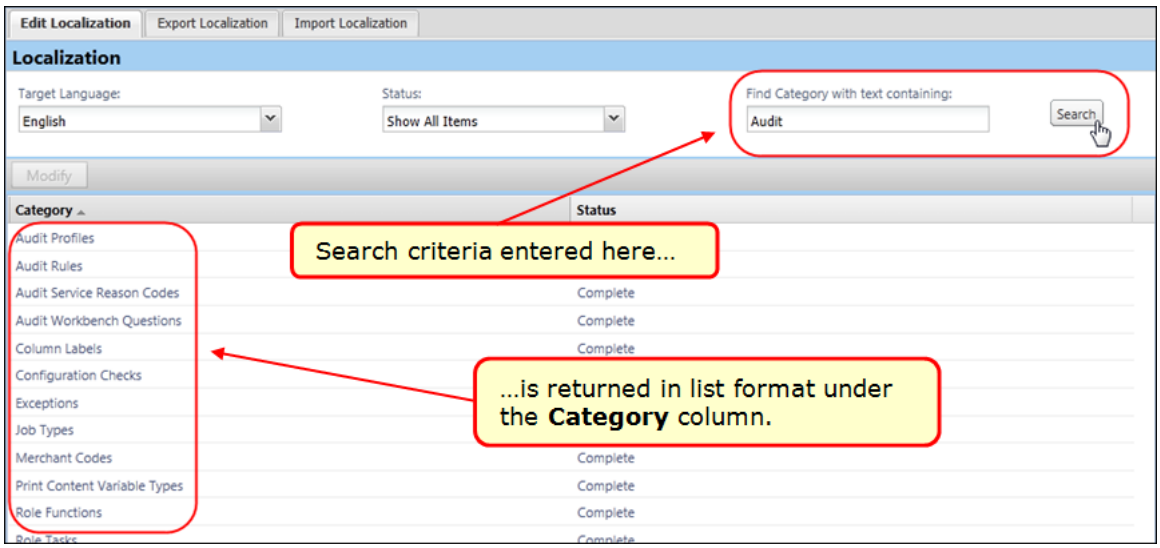
Configuration/Feature Activation

There are no additional configuration or activation steps.

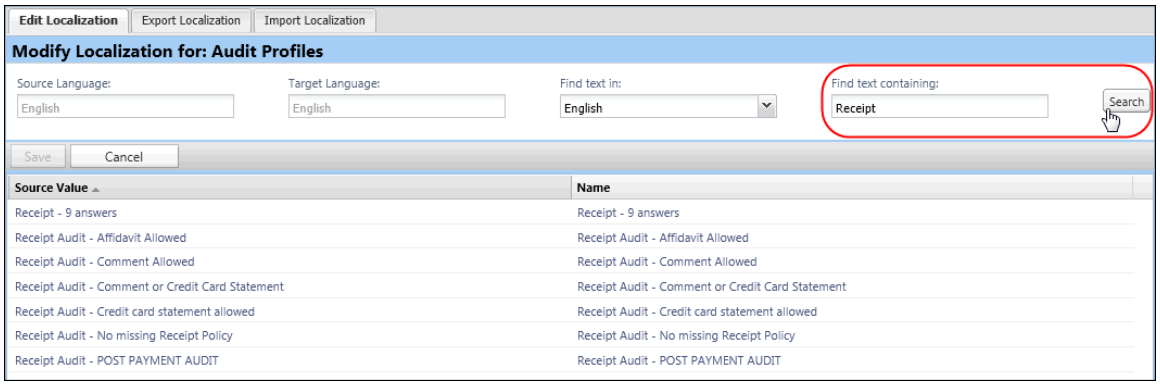
Search Now Available

Overview

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



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



BUSINESS PURPOSE / CLIENT BENEFIT

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

What the User Sees

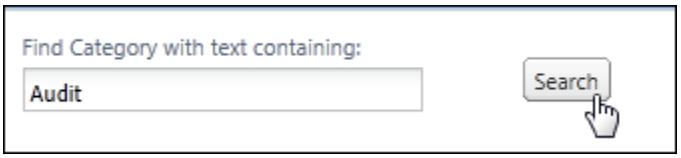
The user sees the newly translated phrases for their locale after they log in.

What the Admin Sees

The admin sees the new search functionality in the Localization tool.

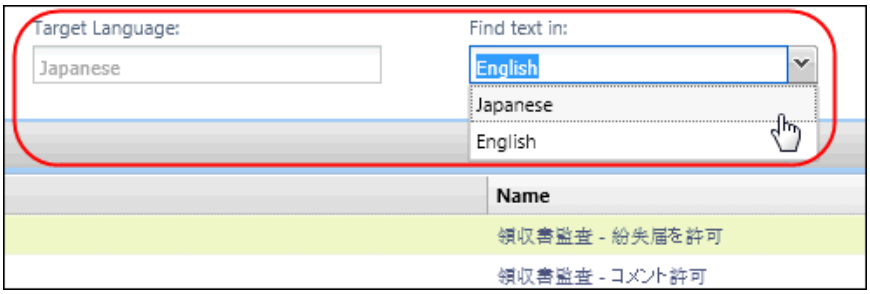
To search for phrases to localize:

1. Click **Administration** > **Request Admin** > **Localization**.
2. In the **Edit Localization** tab, enter a word or phrase (Audit; Audit Rules) in **Find Category with text containing**.



3. Click **Search** to return a list of categories under the **Category** column.
4. Select a category and click **Modify** to view the phrases in that category.

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



5. Enter the search term in **Find term containing** and then click **Search**.

6. The phrases containing the search criteria are listed for localizing.

Configuration/Feature Activation

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

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

Integrated with Expense

Cash Advance View in Expense

Overview

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

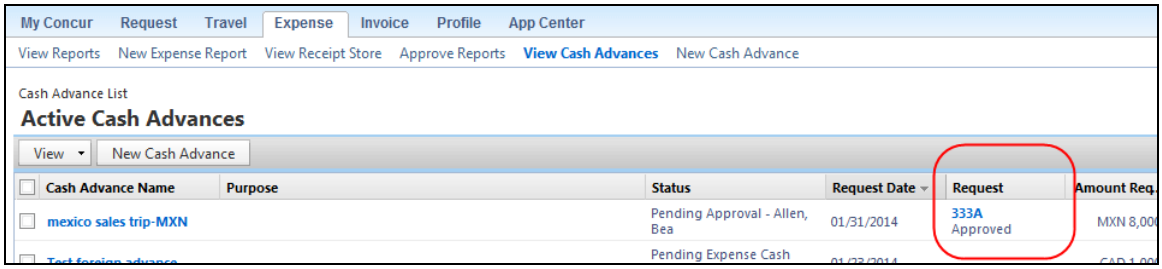
BUSINESS PURPOSE / CLIENT BENEFIT

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

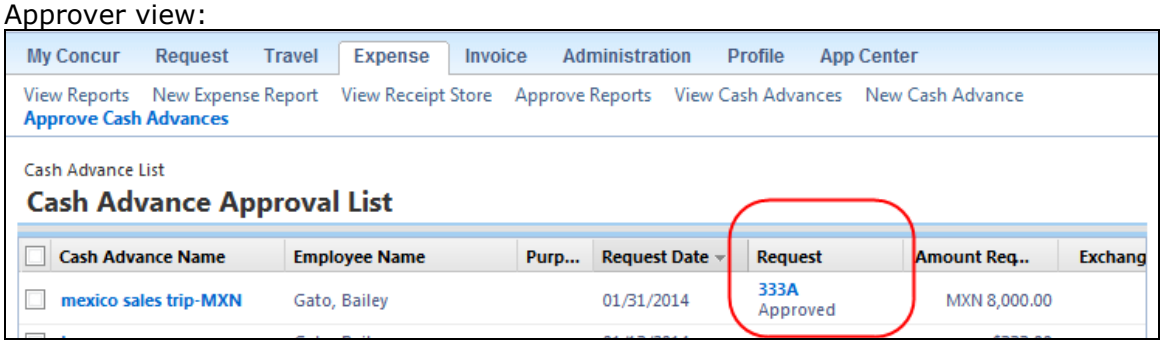
What the User and Approver See

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

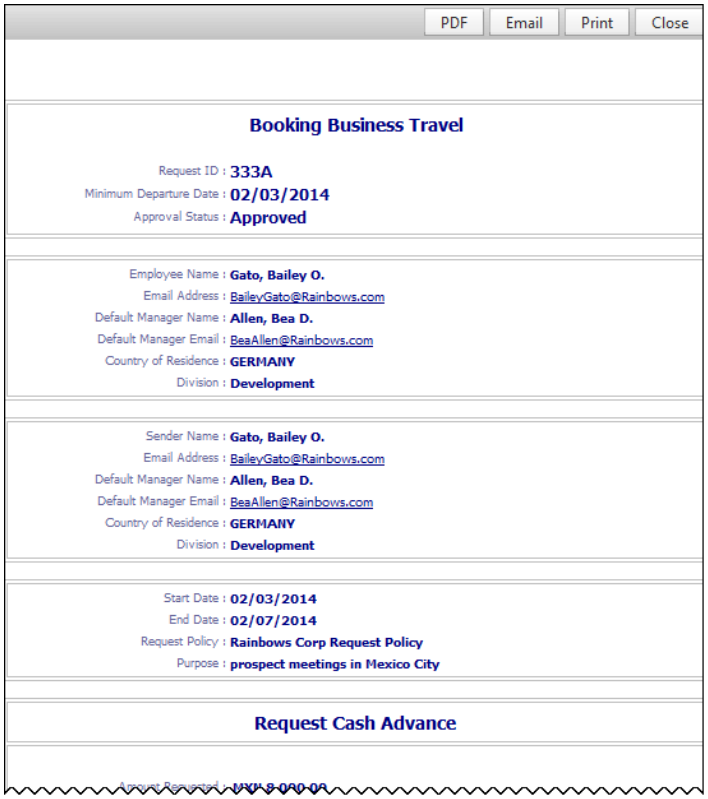
User view:



Approver view:

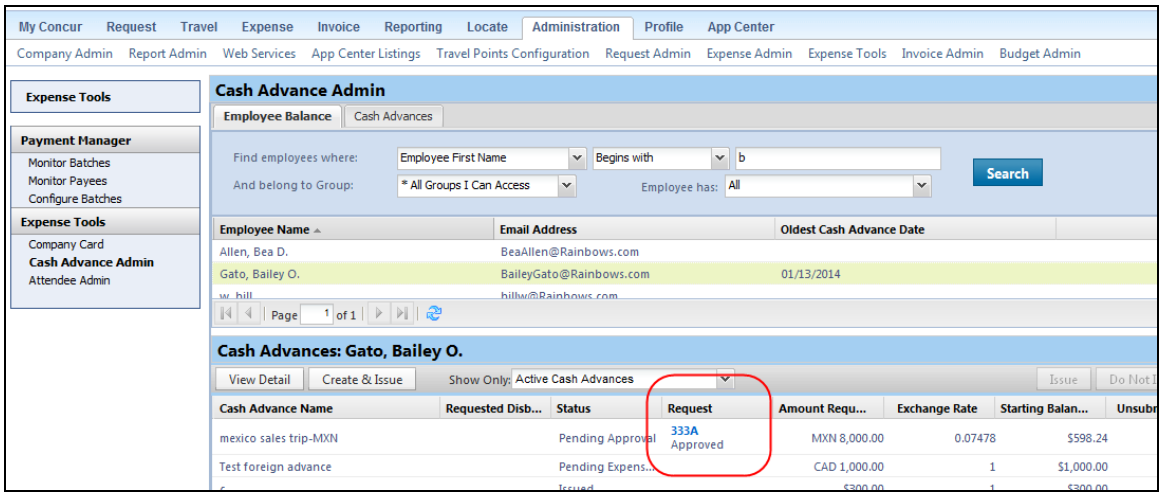


When the user clicks the link, the printed report (as configured in Request) appears.



What the Cash Advance Admin Sees

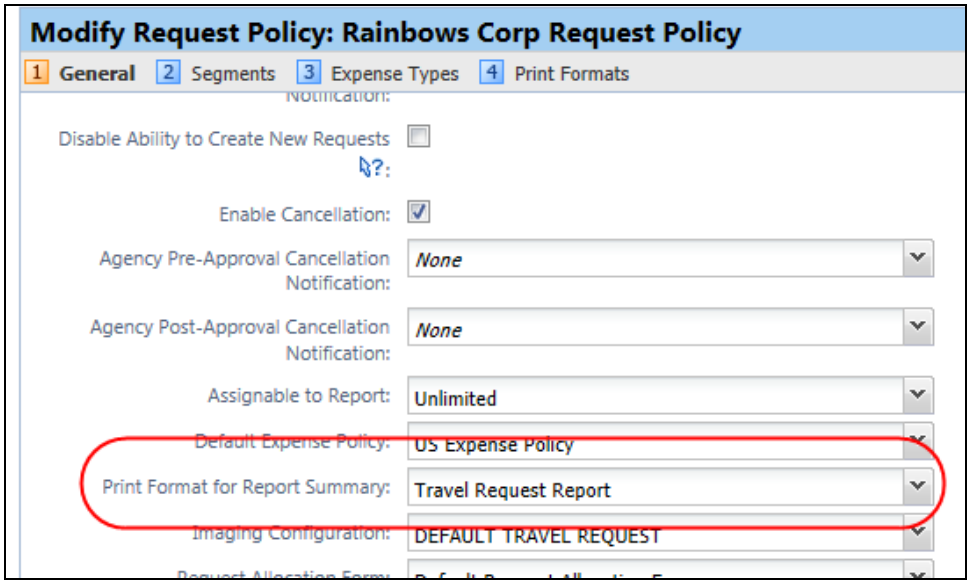
The Cash Advance admin sees the same view.



Configuration/Feature Activation

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

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



Additional Release Notes, Webinars, and Technical Documentation

Concur Support Portal

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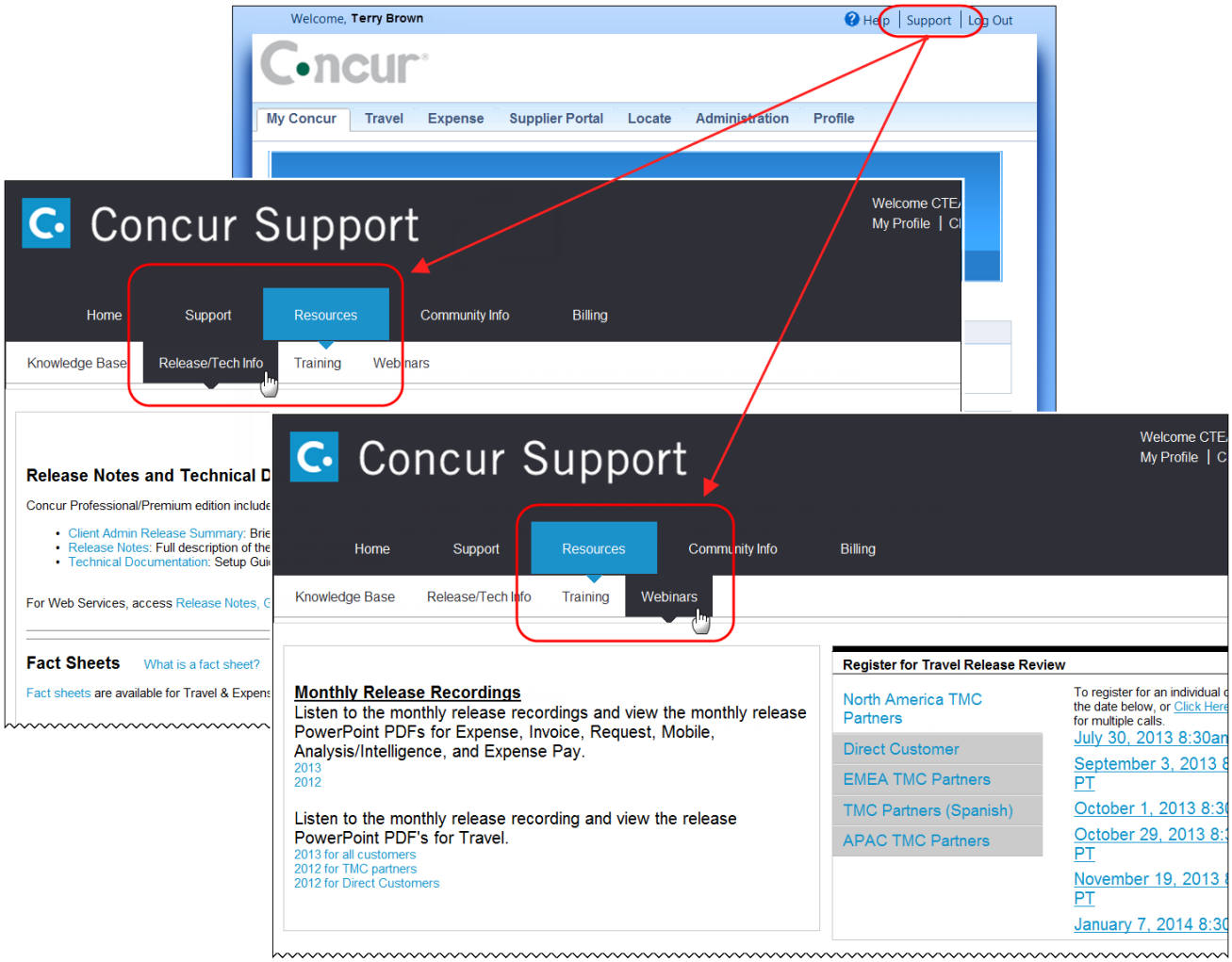
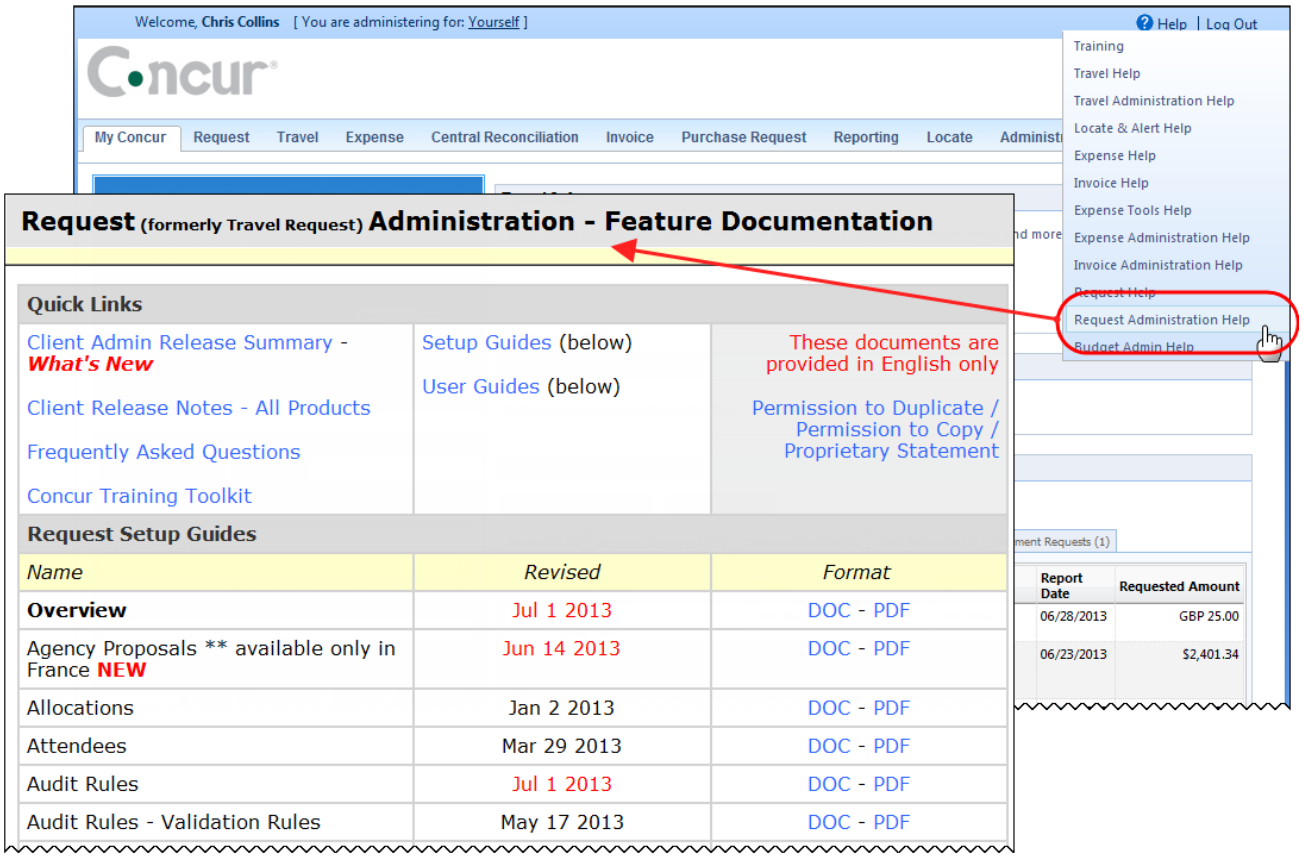


NOTE: If you use a user interface layout ***other than*** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

Online Help – Admins

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



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
April 2014 Initial post: Friday, April 11, 1:00 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 new features are:

- Processor: Queries for Event Requests
- Request Approvers: Change the Landing Page
- Request Approvers: Prevent Approval After the Approval Time Limit
- Agency Proposals: New Email Option
- Integrated with Concur Travel: Finishing Endpoints for Concur Request Custom Fields
- Integration Administrator: Available in the Current User Interface
- New Concur User: Automatic Email Option
- Budget Insight: Load Your Budget Approvers Using Employee Import

Release Notes

Processor: Queries for Event Requests

Overview

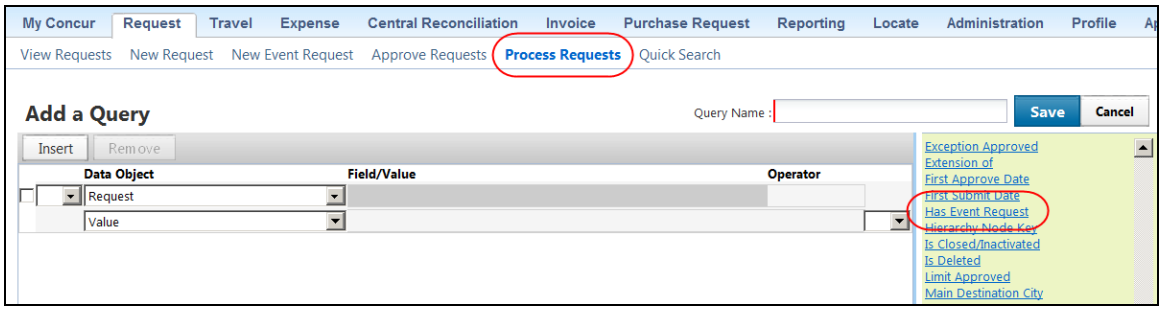
With this release, a new query option – Has Event Request – has been added for Request processors. Users with the Request Administrator role can now create queries for event requests.

BUSINESS PURPOSE / CLIENT BENEFIT

This new option makes it easier for processors to find event requests.

What the Processor Sees

When creating a query, the *Has Event Request* option now appears.



Configuration / Feature Activation

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

Request Approvers: Change the Landing Page

Overview

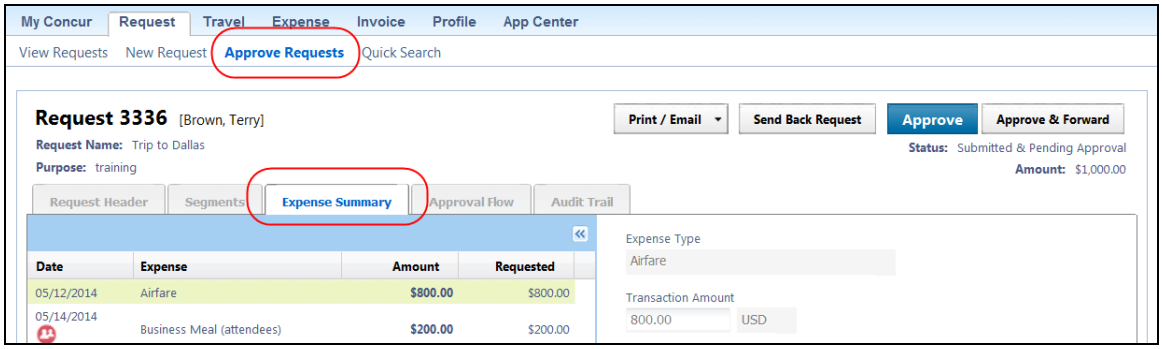
When a Request approver opens a request, the **Expense Summary** page displays by default. With this release, Concur has added a setting that can be used to display the **Request Header** page by default.

BUSINESS PURPOSE / CLIENT BENEFIT

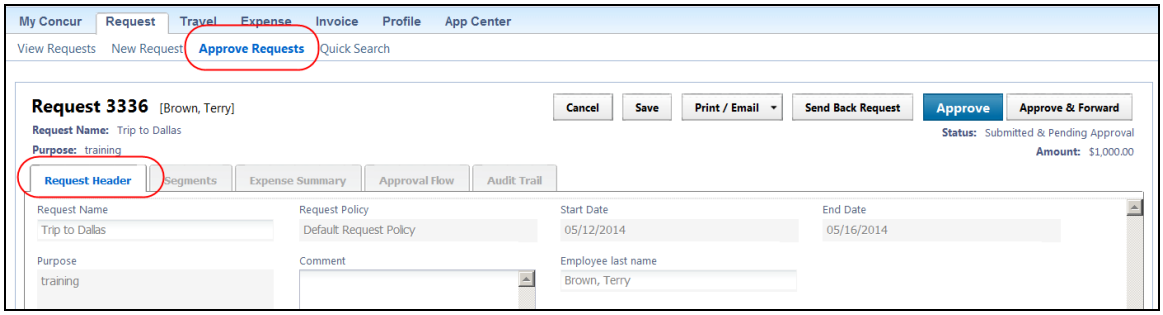
This new setting can streamline the request approval process.

When the Approver Sees

By default, the **Expense Summary** tab automatically appears.



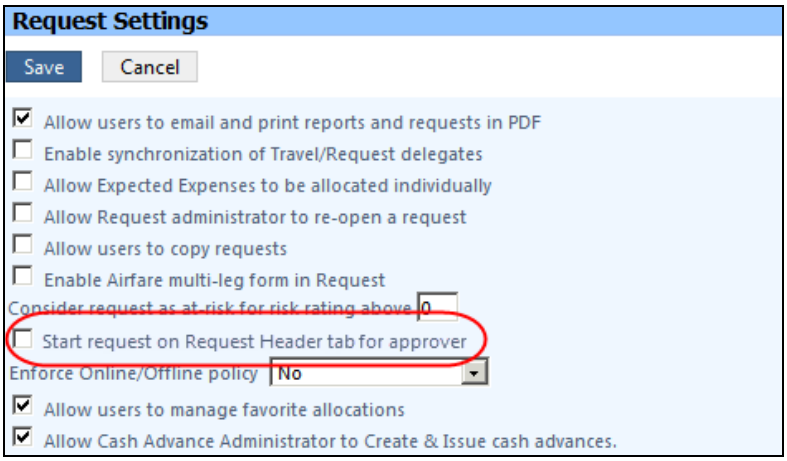
If this new option is used, the approver sees the **Request Header** immediately after opening the request – instead of the **Expense Summary** page.



Configuration / Feature Activation

To configure:

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



2. Select (enable) the **Start request on Request header tab for approver** check box.

Request Approvers: Prevent Approval After the Approval Time Limit

Overview

Currently, it is possible for a request approver to approve a request after the defined approval time limit. For example, assume that Concur Request is integrated with Concur Travel so the user accesses Travel to initiate the requested trip. In Travel, the user is notified that the request must be approved by a certain date/time or the trip will be cancelled. The user accesses Concur Request and submits the corresponding request but – for some reason – the request approver does not approve the request in time.

Currently, the approver can – even after the final date/time – open and approve the request. With this release, clients can create a workflow step rule to prevent the approver from approving the request after the approval time limit.

Business Purpose / Client Benefit

This feature eliminates the situation where the request was approved ***after*** the trip has been cancelled – perhaps leaving the user stranded at the airport without a flight or forcing the traveler to book a new ticket with the risk that the price has now increased significantly.

What the Approver Sees

If the new workflow step rule is used ***and*** if an approver attempts to approve a request after the approval time limit, the approver sees a client-defined exception message stating that the request cannot be approved.

Configuration / Feature Activation

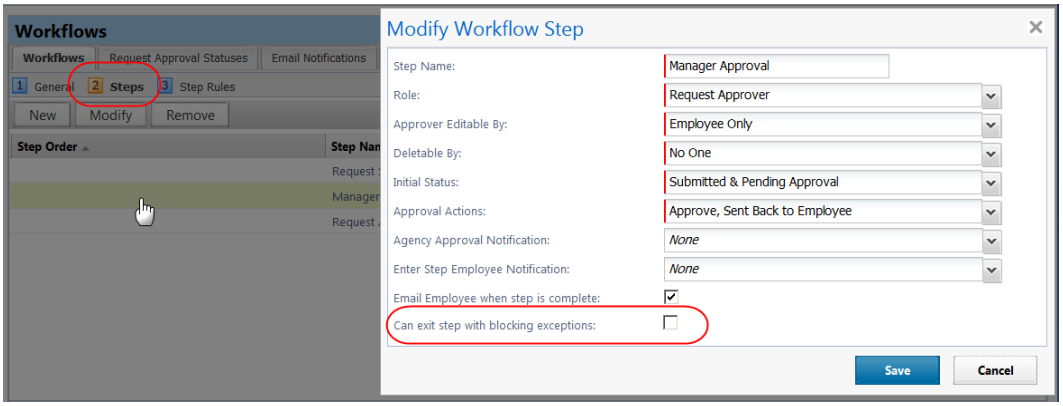
Clients wanting to use this feature must contact Concur Client Support for assistance.

Concur will follow the configuration/activation steps noted below.

The basic process is this: The admin creates a workflow step and step rule that checks to see if the approval time limit is in the past. If it has, then the step rule creates a blocking exception.

To do so:

1. Click **Administration** > **Request Admin** > **Workflows** (left menu).
2. On the **Workflows** tab, double-click the desired workflow.
3. On the 2 **Steps** page, double-click the desired step. The **Modify Workflow Step** window appears.

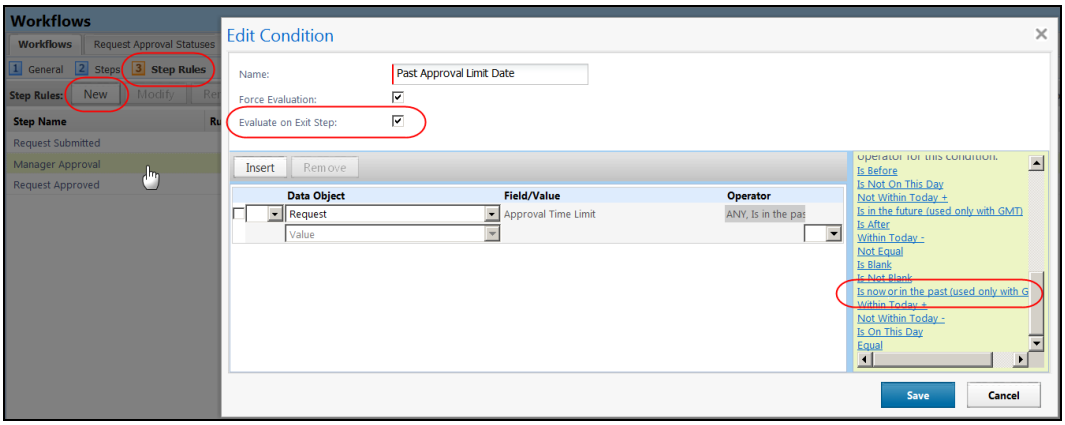


- Ensure that the **Can exit step with blocking exceptions** check box is cleared (disabled).

NOTE: This step ensures that the approver cannot bypass the blocking exception.

- Click **Save**.

4. On the 3 **Step Rules** page, click the desired step and click **New**. The **Edit Condition** window appears.



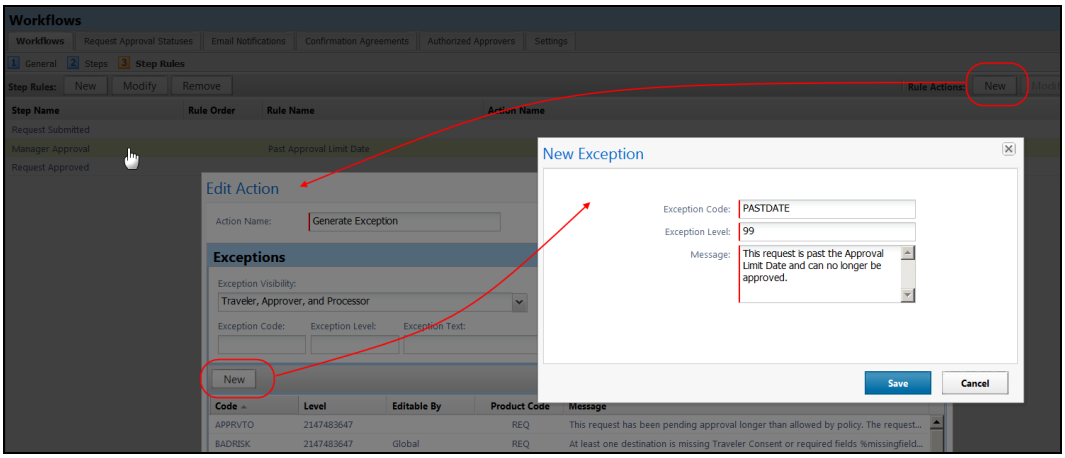
- Name the condition.
- Select (enable) the **Evaluate on Exit Step** check box.

NOTE: The condition actually evaluates the date ***and*** time. This setting ensures it evaluates at the time the approver exits (attempts to approve the request). So, if the approver *opens* the request within the proper time period but leaves it open – he/she cannot approve after the deadline has passed.

- In the **Data Object** list, click *Request*.
- In the **Field/Value** list, click *Approval Time Limit*.
- In the **Operator** list, click *Any* and then *Is now or in the past*.
- Click **Save**.

5. Click the desired step and click **New** in the **Rule Actions** area. The **Edit Action** window appears.

6. In the **Exceptions** area of the **Edit Action** window, click **New** to create a new exception. The **New Exception** window appears.



- Enter a name.
- Enter an exception level (blocking) that prevents approval/submission.
- Enter a message.
- Click **Save**.

7. Select the new exception message for the rule and click **Save**.

Email Notifications: New Email Option

Overview

Currently, an email is sent to the agency for the initial request and for any modifications. Both emails use the same template, making it difficult for the agency to distinguish new requests from modified requests.

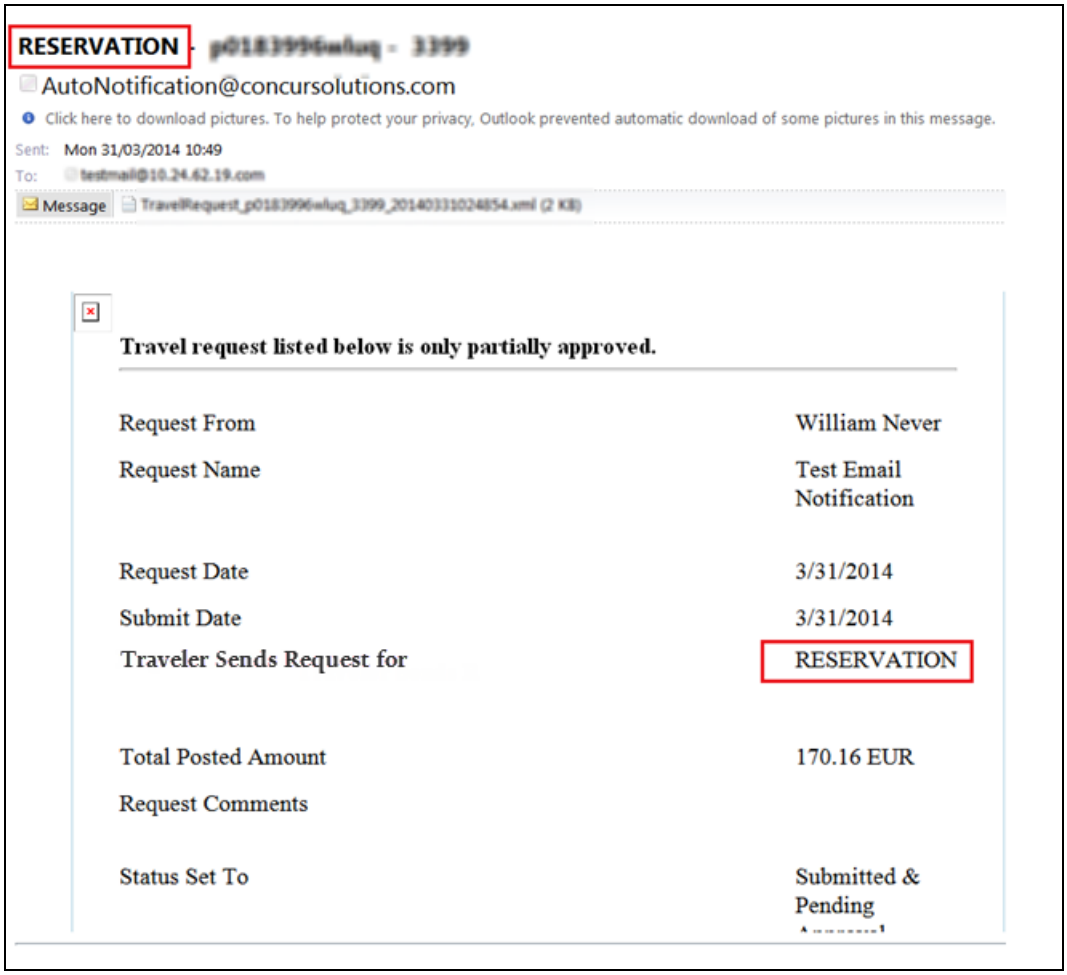
With this release, a new email object variable is available, which will provide the text *Reservation* in the initial email and *Modification* on subsequent emails to the agency.

Business Purpose / Client Benefit

This feature benefits both the user and the agency, increasing efficiency and accuracy.

What the Agency Sees

Sample of initial email:



RESERVATION - [illegible] - 3399

AutoNotification@concursolutions.com

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Sent: Mon 31/03/2014 10:49

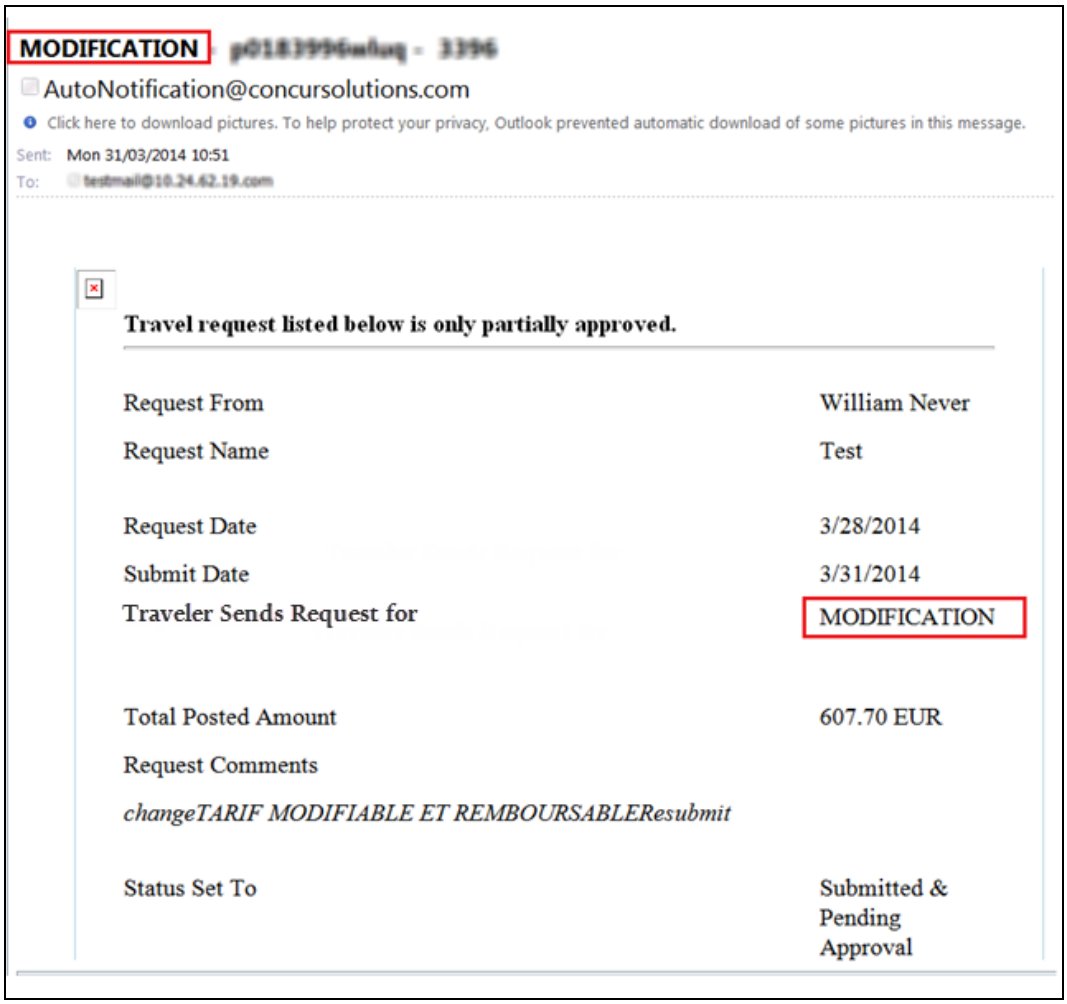
To: [illegible]

Message TravelRequest_[illegible].xml (2 KB)

Travel request listed below is only partially approved.

Request From	William Never
Request Name	Test Email Notification
Request Date	3/31/2014
Submit Date	3/31/2014
Traveler Sends Request for	RESERVATION
Total Posted Amount	170.16 EUR
Request Comments	
Status Set To	Submitted & Pending

Sample of modification email:



MODIFICATION

AutoNotification@concursolutions.com

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Sent: Mon 31/03/2014 10:51

To: testmail@10.24.62.19.com

Travel request listed below is only partially approved.

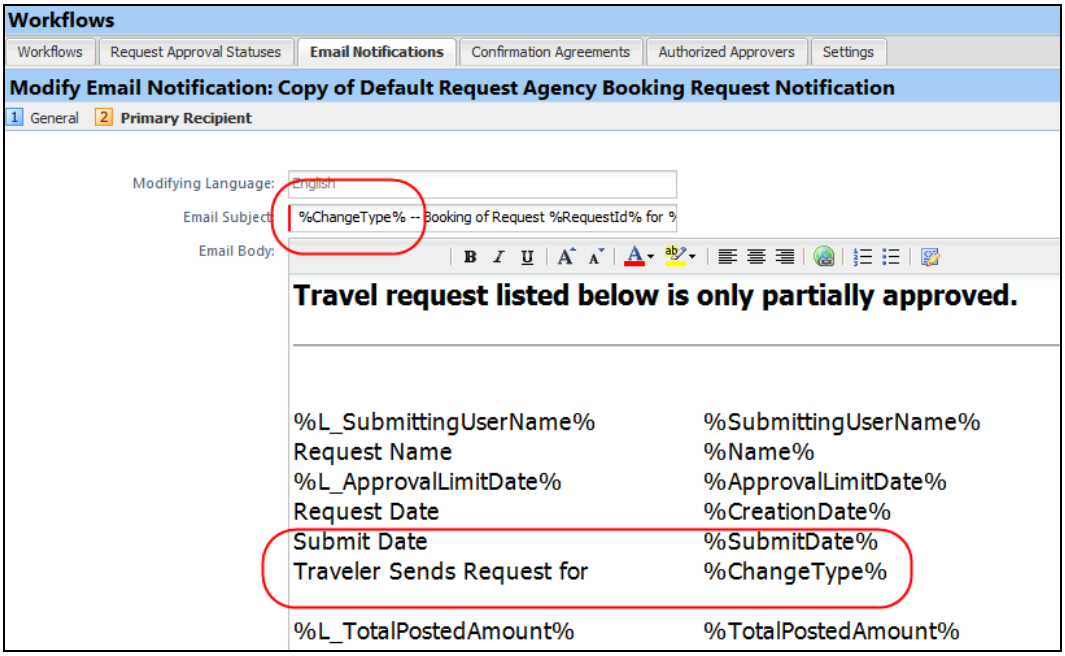
Request From	William Never
Request Name	Test
Request Date	3/28/2014
Submit Date	3/31/2014
Traveler Sends Request for	MODIFICATION
Total Posted Amount	607.70 EUR
Request Comments	
changeTARIF MODIFIABLE ET REMBOURSABLEResubmit	
Status Set To	Submitted & Pending Approval

Configuration / Feature Activation

The new variable is not included by default. You can add the variable to an existing email template or create a new one.

To add the new variable:

1. Click **Administration** > **Request Admin** > Workflows (left menu).
2. Click the **Email Notifications** tab.
3. Select the desired email or create a new one.
4. Add the new %ChangeType% option.



NOTE: Consider adding the new variable in the subject ***and*** in the email body.

Integrated with Concur Travel: Finishing Endpoints for Concur Request Custom Fields

For invoicing and reporting purposes, TMCs require Request data to be available in the PNR. Request header custom fields ***labels*** were already available. In order to comply with TMC back-office processes, with this release, we now also provide the 20 custom fields ***codes*** from Concur Request as finishing data points in Concur Travel.

For more information, refer to the Concur Travel release notes for this month.

Integration Administrator: Available in the Current User Interface

Overview

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

With this release:

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Roles

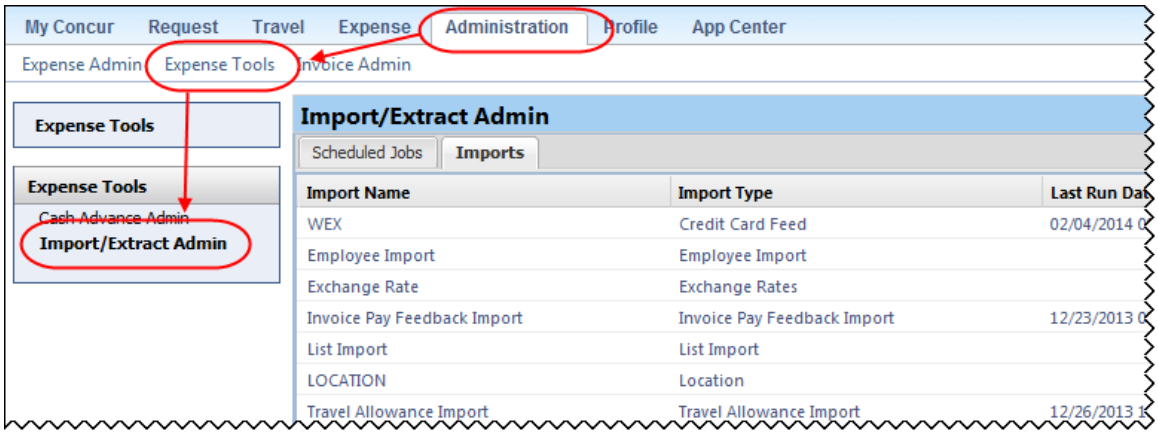
The role names have been updated to better reflect the role's actual permissions and the name of the tool.

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

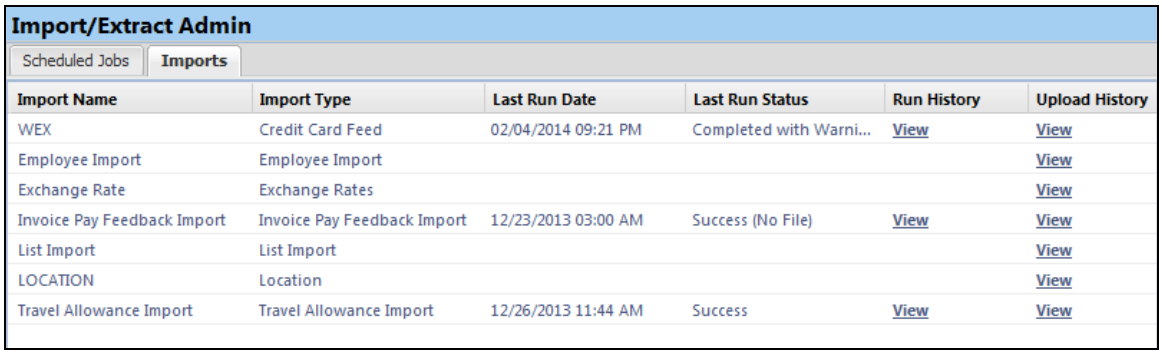
What the Admin Sees

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

NOTE: Even if the user has no other roles related to Expense Tools, the **Administration** > **Expense Tools** menu option appears to the user when either Import/Export role is assigned.



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



Import/Extract Admin

Scheduled Jobs | **Imports**

Import Name	Import Type	Last Run Date	Last Run Status	Run History	Upload History
WEX	Credit Card Feed	02/04/2014 09:21 PM	Completed with Warni...	View	View
Employee Import	Employee Import				View
Exchange Rate	Exchange Rates				View
Invoice Pay Feedback Import	Invoice Pay Feedback Import	12/23/2013 03:00 AM	Success (No File)	View	View
List Import	List Import				View
LOCATION	Location				View
Travel Allowance Import	Travel Allowance Import	12/26/2013 11:44 AM	Success	View	View

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

Configuration / Feature Activation

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

New Concur User: Automatic Email Notification Option

Overview

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

Business Purpose / Client Benefit

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

What the User Sees

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

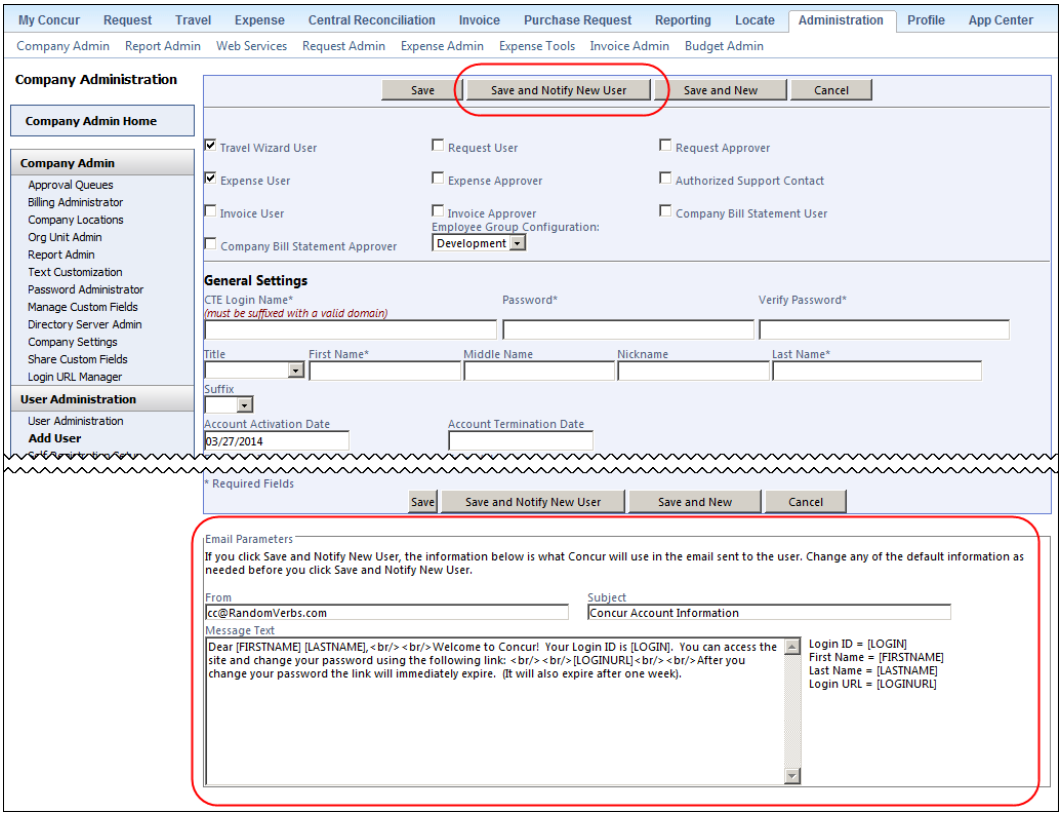
What the Admin Sees

To use the new feature:

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

2. Add the new user information as usual.

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



4. Make any desired changes.

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

Configuration / Feature Activation

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

Budget Insight: Load Budget Approvers Using Employee Import

Overview

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

The new import records consist of:

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Integration Administrator Sees

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

Configuration / Feature Activation

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

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

Deleting a Budget Insight Approver

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

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

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

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**.

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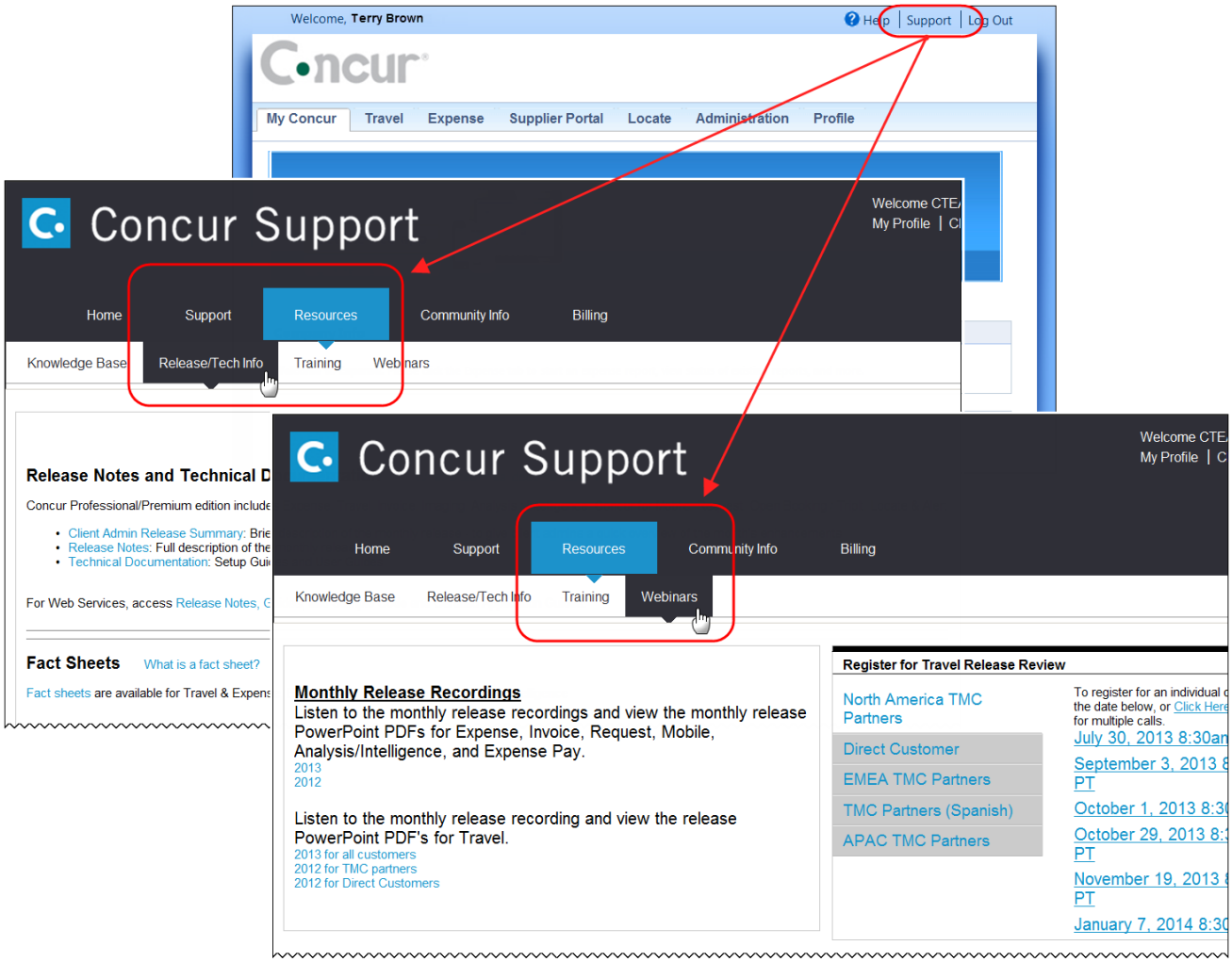
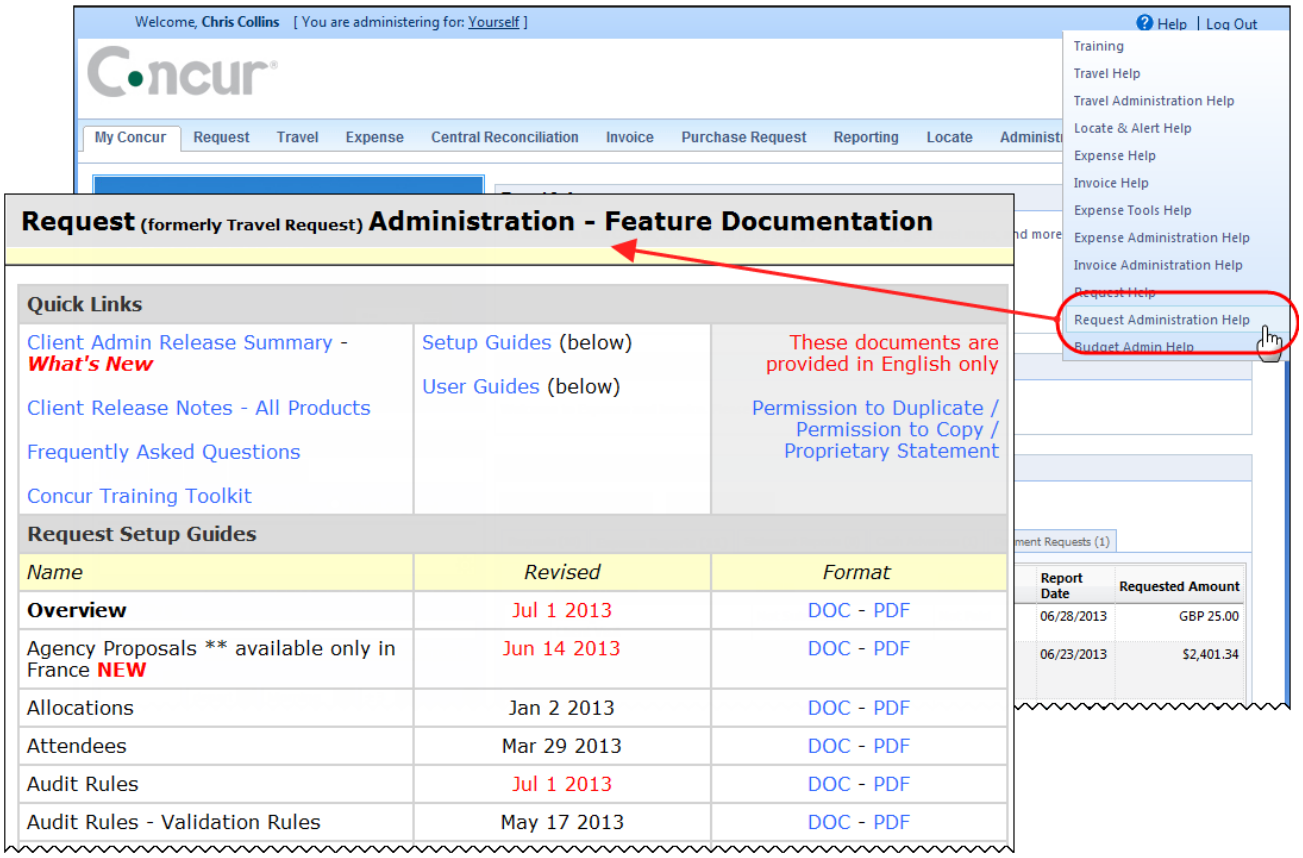
- Click **Webinars** for recorded and live webinars.



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

Online Help – Admins

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



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
May 2014 Initial Post: Thursday, May 15, 3:00 PM PT	Concur - 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:

- View Request: Expense Column Renamed to Action
- Final Booking Page: Updated Messaging
- Risk Management: Custom Field Tooltip Supported on the Travel Advisory Tab
- Travel Segment Time Field Now Shows Hourly Times

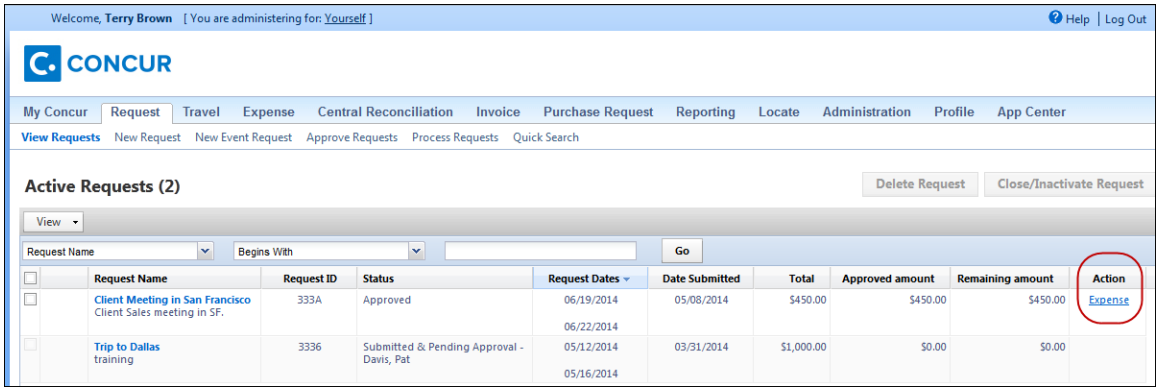
Release Notes

View Request: Expense Column Renamed to Action

Overview

The **Request List** page has been updated with the following changes:

1. The **Expense** column has been renamed to **Action**.
2. The Expense icon has been replaced with a link titled **Expense**. The link leads to the same page that the icon linked to.



BUSINESS PURPOSE / CLIENT BENEFIT

As we plan to make other actions available from this page in future releases, the purpose is to provide the user with a clear action label.

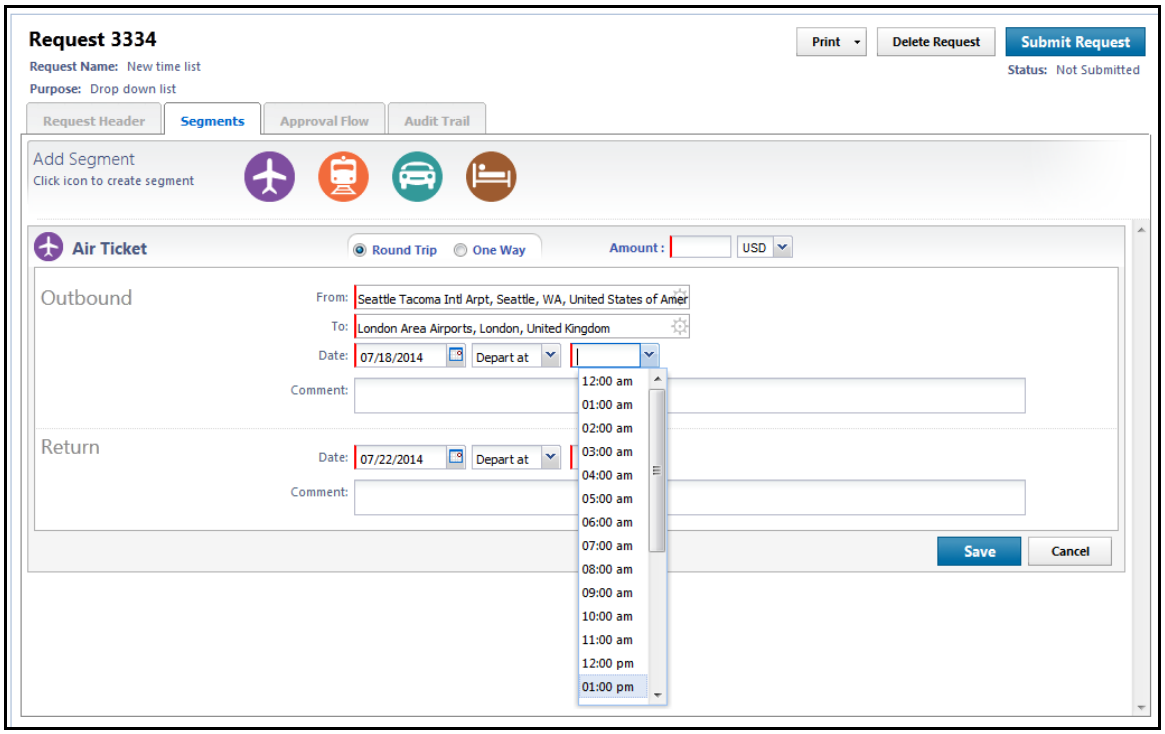
Configuration / Feature Activation

The feature is automatically on for clients who have integrated Request with Expense.

Travel Segment Time Field Now Shows Hourly Times

Overview

Prior to this release, the time field for all segment types included a list with 15 minute time increments. In the May release, the list is updated to show one hour increments. Clients that have configured this field to be editable can still manually enter any time value.



This change applies to all segment types.

Business Purpose / Client Benefit

This enhancement removes unnecessary complexity and makes finding the correct time faster and easier.

Configuration / Feature Activation

The feature is automatically on for all clients.

Final Booking Page: Updated Messaging

Overview

When User Survey is on, clients with Travel and Request integration enabled will see updated messaging inviting them to Submit their Request when a trip is successfully booked.

Business Purpose / Client Benefit

This update provides clear status information about the trip, removing the confusing label "Finished!" as the user still have to submit the Request for the process to go on.

Configuration / Feature Activation

The feature is automatically on for all clients who have integrated Travel with Request and have enabled the User Survey.

Risk Management: Travel Advisory Tab Tooltips Supported

Overview

Clients who have integrated Request with Risk Management can see the **Travel Advisory** tab for requests, and can choose to configure custom fields on the tab. Tooltips configured for the custom fields were not appearing. In the May 2014 release, the tooltips configured for custom fields now appear on the **Travel Advisory** tab.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides more information to users about custom fields.

Configuration / Feature Activation

The feature is automatically on for all clients who have integrated Request with Risk Management.

Supported Configurations

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

Microsoft Internet Explorer Version 7.x Retirement December 2014

Overview

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

Background

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

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

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

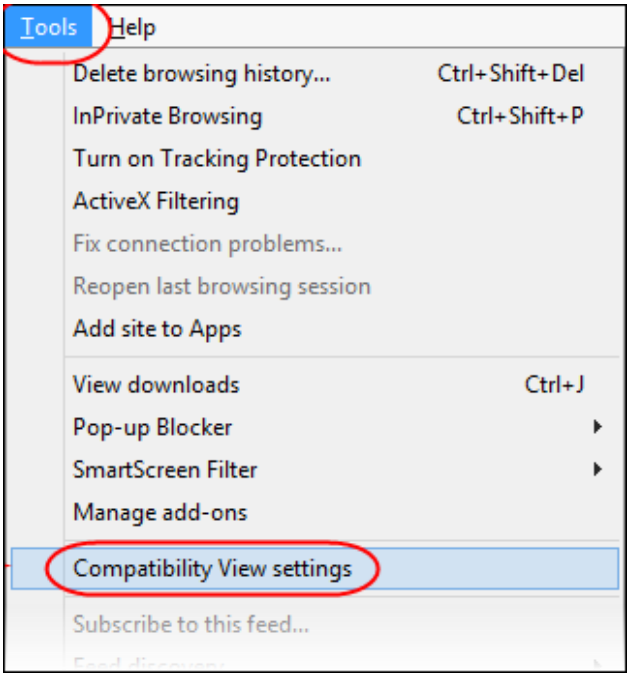
Overview

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

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

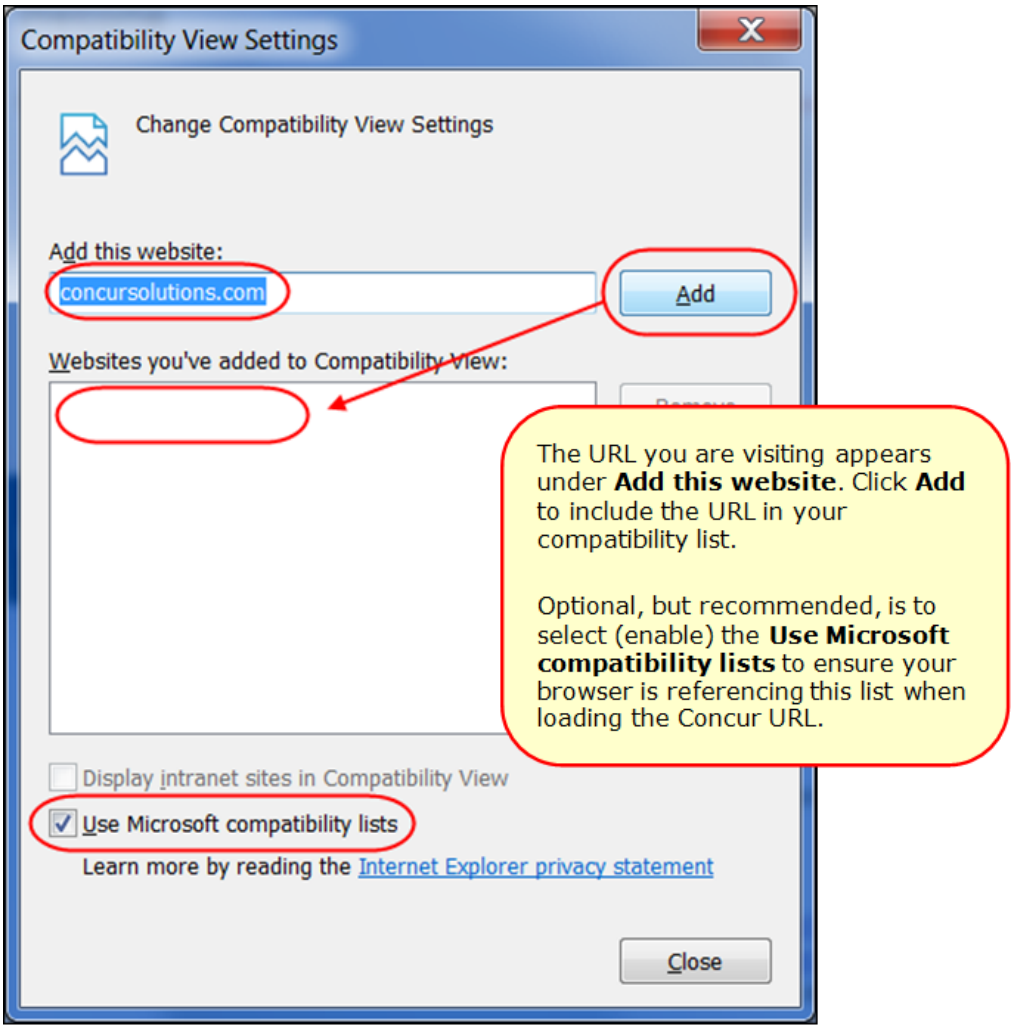
To add Concur to your IE v. 11 compatibility list:

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



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

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



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

4. Click **Close**.

Monthly Browser Certifications

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

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

Additional Release Notes, Webinars, and Technical Documentation

App Center: New Dedicated Release Notes

Overview

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

Client Support Portal

Release Notes - Concur Professional/Premium

Notes:

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

If the client has this Concur solution... ➤➤➤ / *...then the client should review these Release Notes* ▼▼▼	Expense	Travel	Invoice	Request
Expense (includes Imaging, Expense Pay, Expense Report Auditing, Jobs; cases/issues list in a separate doc)	X			
Travel (with cases/issues list)		X		
Invoice Management (with cases/issues list)			X	
Request - or Authorization Request; formerly Travel Request				X
Additional services: The X indicates that these services - and release notes - are available for use with the Concur solutions shown above.				
App Center	X	X	X	X
Mobile app (with cases/issues list) **NOTE:** Mobile is ***not*** released on the standard release schedule. The release notes are published throughout the month as each platform is updated.	X	X	X	
TripLink	X	X		
Concur Insight (formerly Analysis / Intelligence)	X		X	X (Essentials only)
Concur Messaging (formerly Risk Management) **NOTE:** Concur Messaging is ***not*** released on the standard release schedule.				X
Locate & Alert	X	X		
Web Services Platform	X	X	X	X
Monthly Browser Certification	**X**	**X**	**X**	**X**

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration/ Feature Activation

No additional configuration is required.

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.
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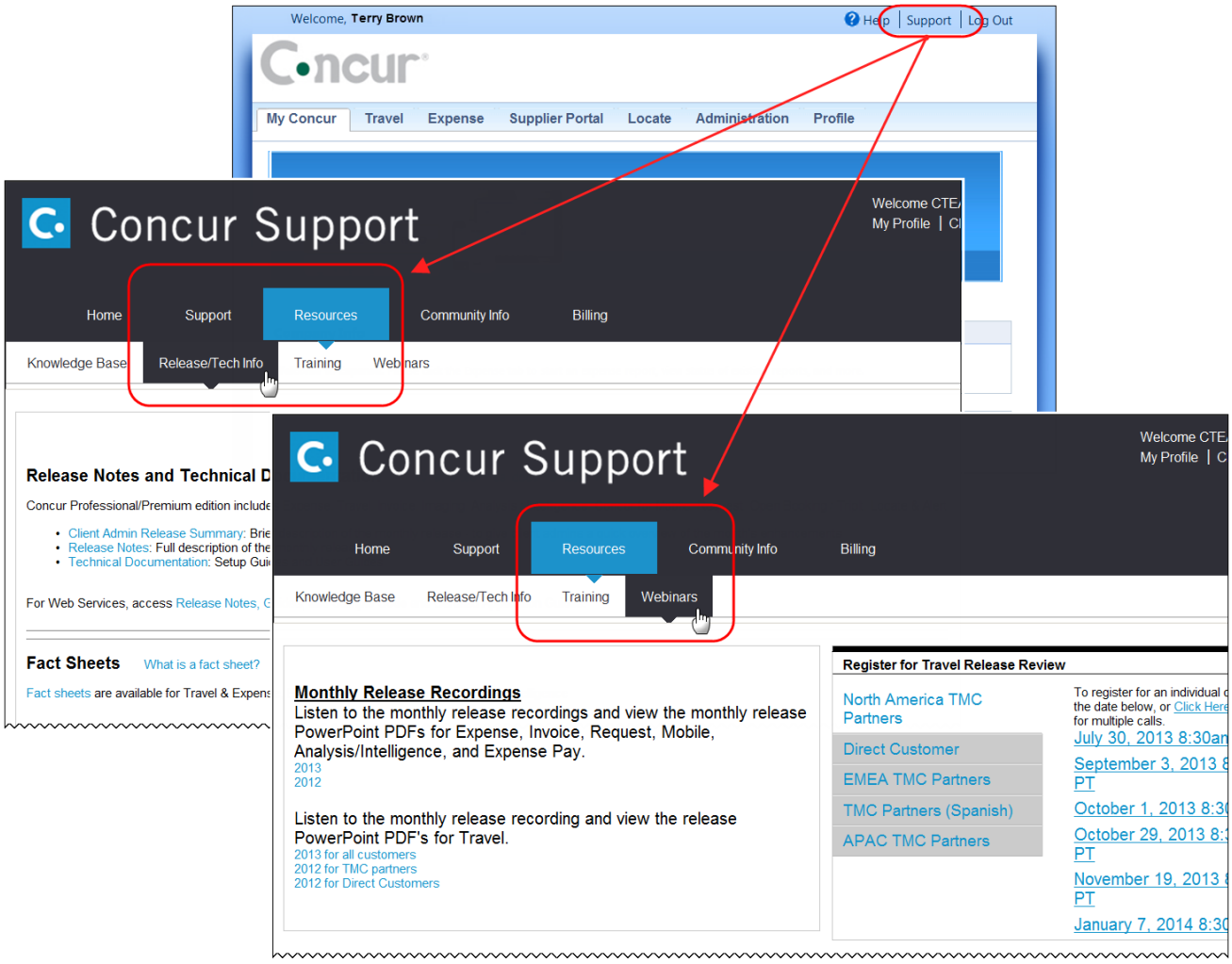
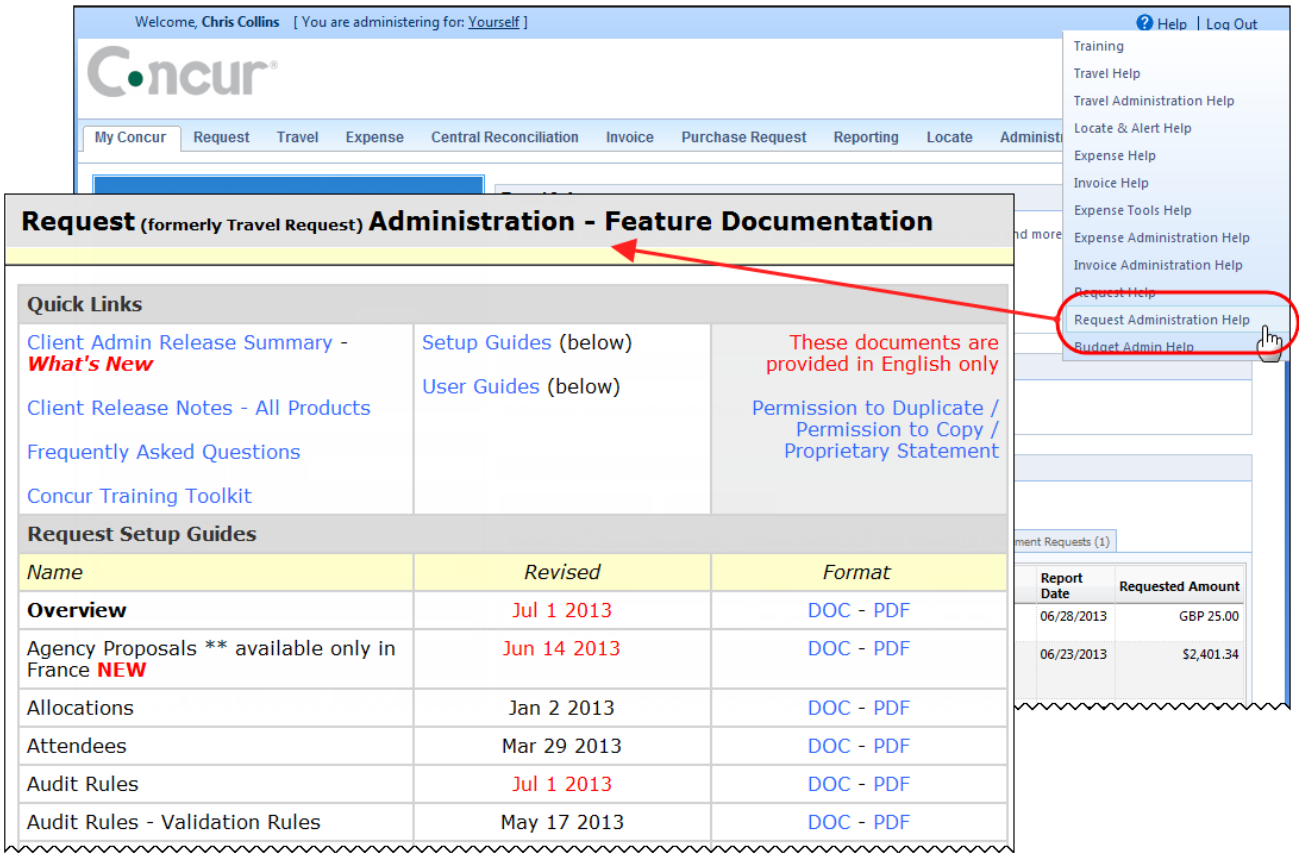


NOTE: If you use a user interface layout ***other than*** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

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**
June 2014 Initial Post: Friday, June 13, 1:00 PM PT	Concur - 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:

- Coming Soon: The Concur User Experience Evolution
- Airport IATA Code Now Displays
- Time Slot Field List Value Retired

Release Notes

Coming Soon The Concur User Experience Evolution

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

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

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

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

Specific product lines impacted are:

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

Key features and enhancements are:

- Enhanced Home and Expense pages with effortless navigation and a modern consumer-based application "Look-and-Feel"
- A streamlined travel summary and booking workflow process
- Consistent terminology and iconography – across all product lines including Travel, Expense, and Invoice
- A dashboard design with logical grouping of like functions and tasks to minimize the number of popups or pages required to complete a specified task

- A facts and stats section with key metrics and other helpful information for the user
- Actions, alerts, and notifications that are clearly defined and visible
- Vastly improved smart matching of expenses and receipts as a result of combining key functions on the same page
- Easy access to help, support, and other key resources

Schedule

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

Resources

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

Airport IATA Code Now Displays

Overview

The IATA code for an airport is now displayed in the following locations in Request:

- Autocomplete text when searching for an airport
- Segment page (once a segment is saved)
- Printed reports
- Mobile display

Business Purpose / Client Benefit

This enhancement provides additional information about the airport.

Configuration / Feature Activation

The feature is automatically on for all clients.

Time Slot Field List Value Retired

Overview

The Time Slot field(s) for a segment allow a user to select an approximate time for the segment search. In the June 2014 release, the ASAP value is retired from the Time Slot list. This value appeared after the Morning/Afternoon/Evening values based on client configuration, and it was rarely utilized.

BUSINESS PURPOSE / CLIENT BENEFIT

This update removes an unneeded option and aligns the time slot values with Concur Travel.

Configuration / Feature Activation

The feature is automatically on for all clients.

Supported Configurations

Microsoft Internet Explorer Version 7.x Retirement Schedule

Overview

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

Background

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

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

Monthly Browser Certifications

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

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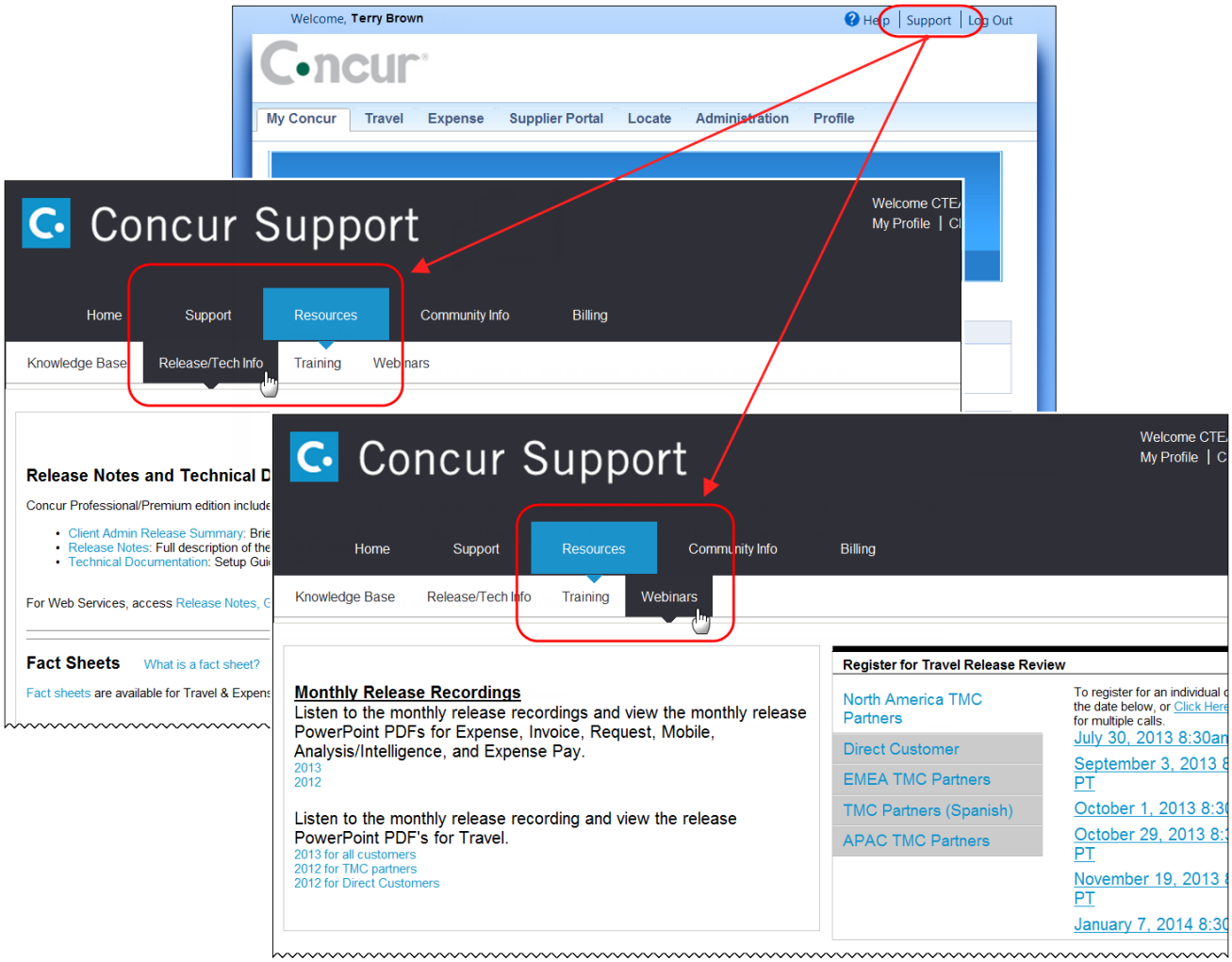

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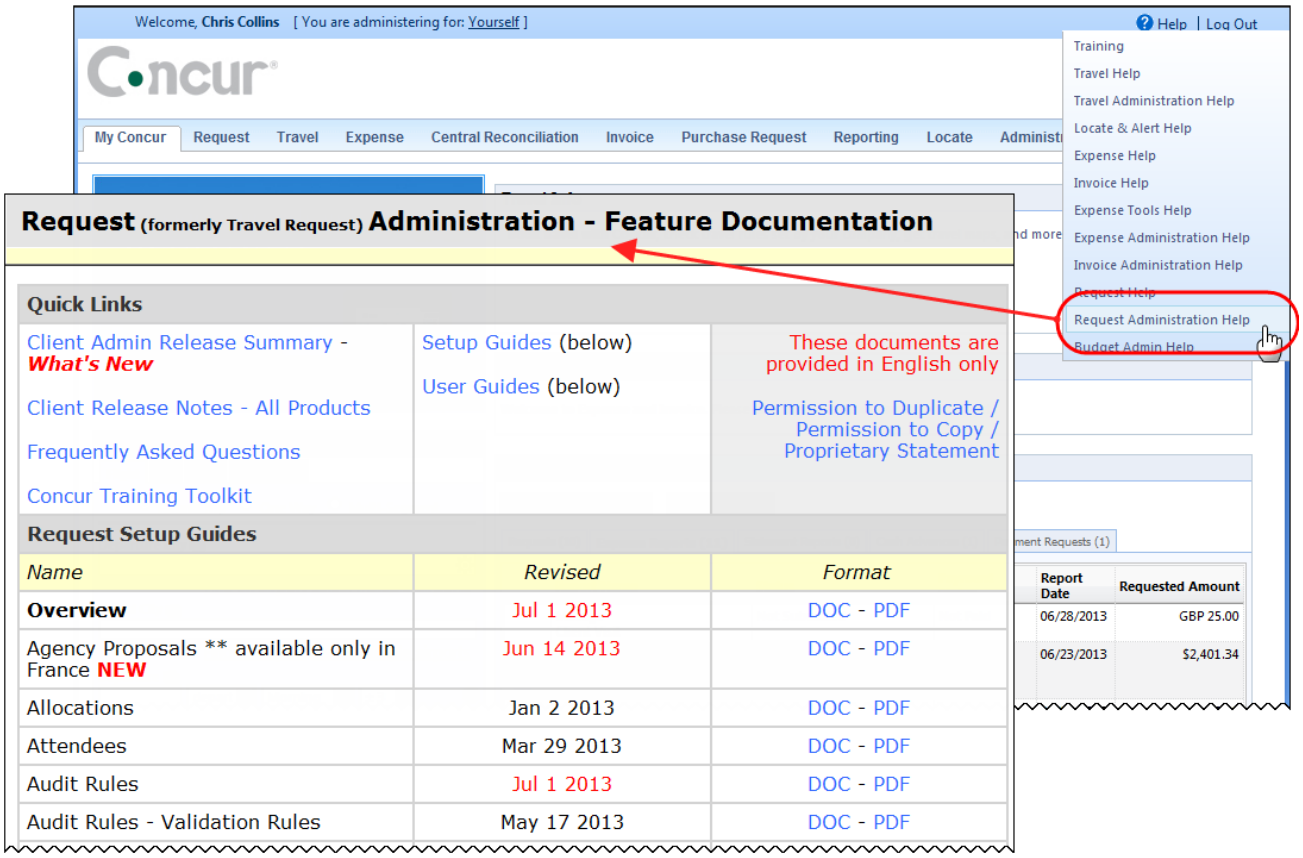

Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
July 2014 Update #1: Thursday, July 17, 11:00 AM PT	Client

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 new features are:

- Coming Soon: The Concur User Experience Evolution
- User Interface: Change in Red Text
- Class Field Added to Audit and Workflow Rules
- Audit Rules: Time Slot Field List Value Removed from Audit Rules
- User Admin: Change Alphabetic List to Tabs

Release Notes

Coming Soon The Concur User Experience Evolution – Professional Edition

Overview

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

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

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

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

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- A facts and stats section with key metrics and other helpful information for the user
- Actions, alerts, and notifications that are clearly defined and visible
- Vastly improved smart matching of expenses and receipts as a result of combining key functions on the same page
- Easy access to help, support, and other key resources

Schedule and Activation – Professional Edition

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

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

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

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

---

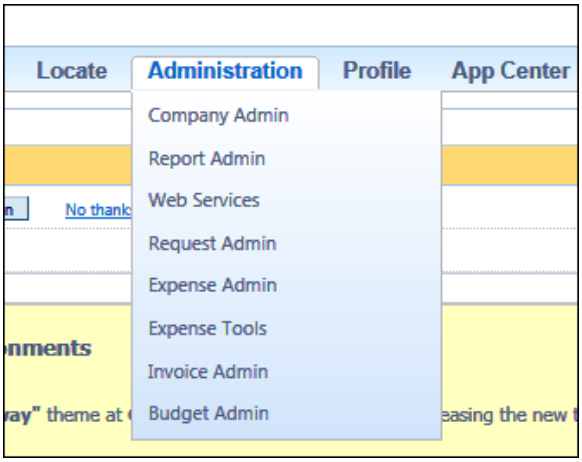
NOTE: As the availability period approaches, you will receive more information (and screen samples) about how these tasks are completed.

BY ADMIN

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

Who can do this?

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

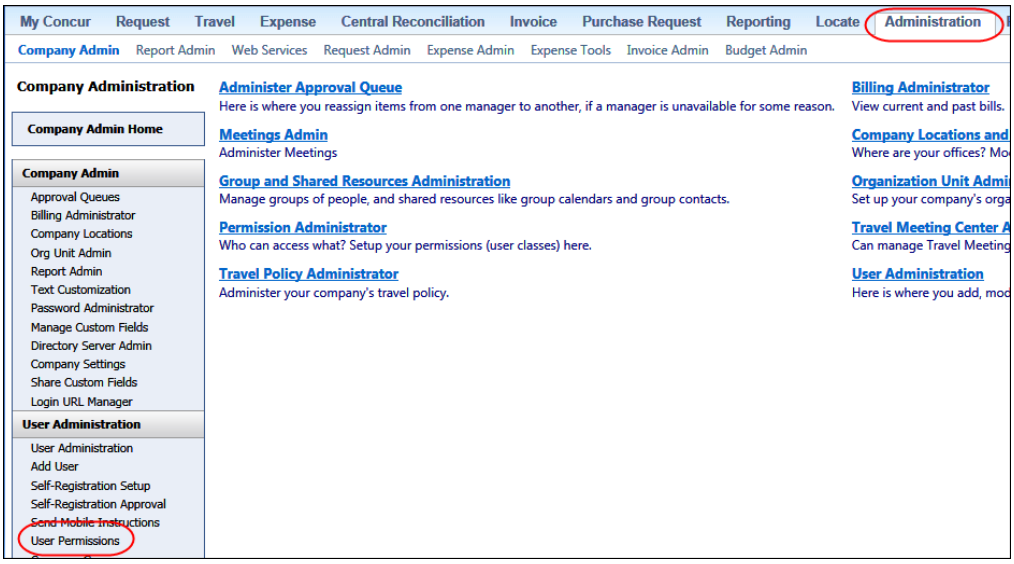


By Selected Users

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

Who can do this?

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



By Groups/Travel Classes

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

Who can do this?

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

ENTIRE COMPANY

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

Who can do this?

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

IMPORTANT!!

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

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

Resources

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

User Interface: Change in Red Text

Overview

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

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

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

Configuration / Feature Activation

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

Class Field Added to Audit and Workflow Rules

Overview

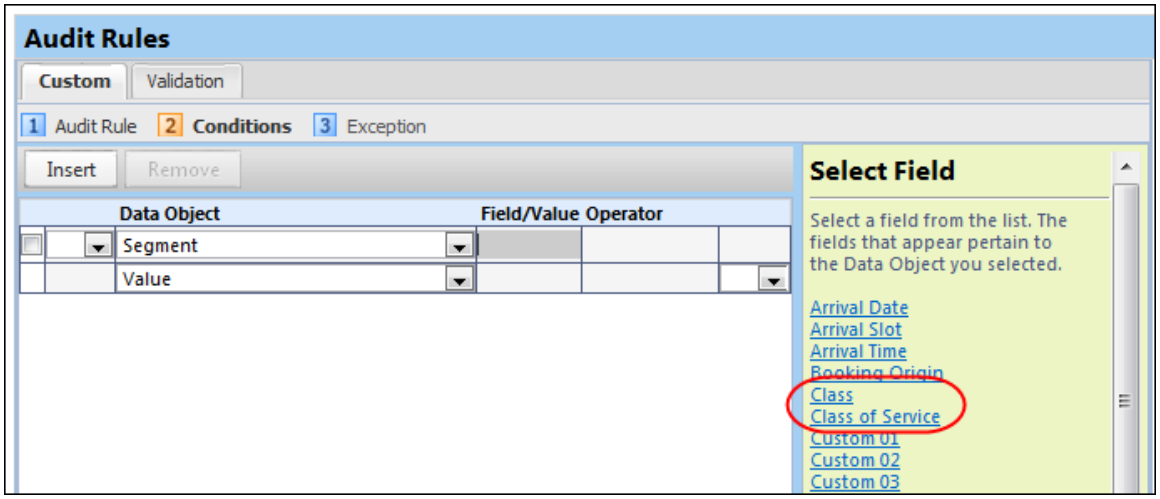
Concur has added the Class field to the available fields for Request audit and workflow rules for all segment types. This field provides a drop-down list of configured classes, similar to the Vendor field.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides more options for creating Class based audit rules.

Two class related fields are now available in Audit Rules and Workflow Rules:

- Class of Service: For segments that are related to a Travel PNR
- NEW Class: For other segments, not related to a Travel PNR. It corresponds to the **Class** field available in Forms & Fields.



Configuration / Feature Activation

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

Audit Rules: Time Slot Field List Value Removed from Audit Rules

Overview

The Time Slot field(s) for a segment allow a user to select an approximate time for the segment search. In the June 2014 release, the ASAP value was retired from the Time Slot list. In the July 2014 release, the ASAP list value was removed from Audit Rules. Any clients with audit rules using this list value were automatically updated, replacing the ASAP value with 6:00 AM.

Business Purpose / Client Benefit

This update finishes removing an unneeded option and aligning the time slot values with Concur Travel.

Configuration / Feature Activation

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

User Admin: Change Alphabetic List to Tabs

Overview

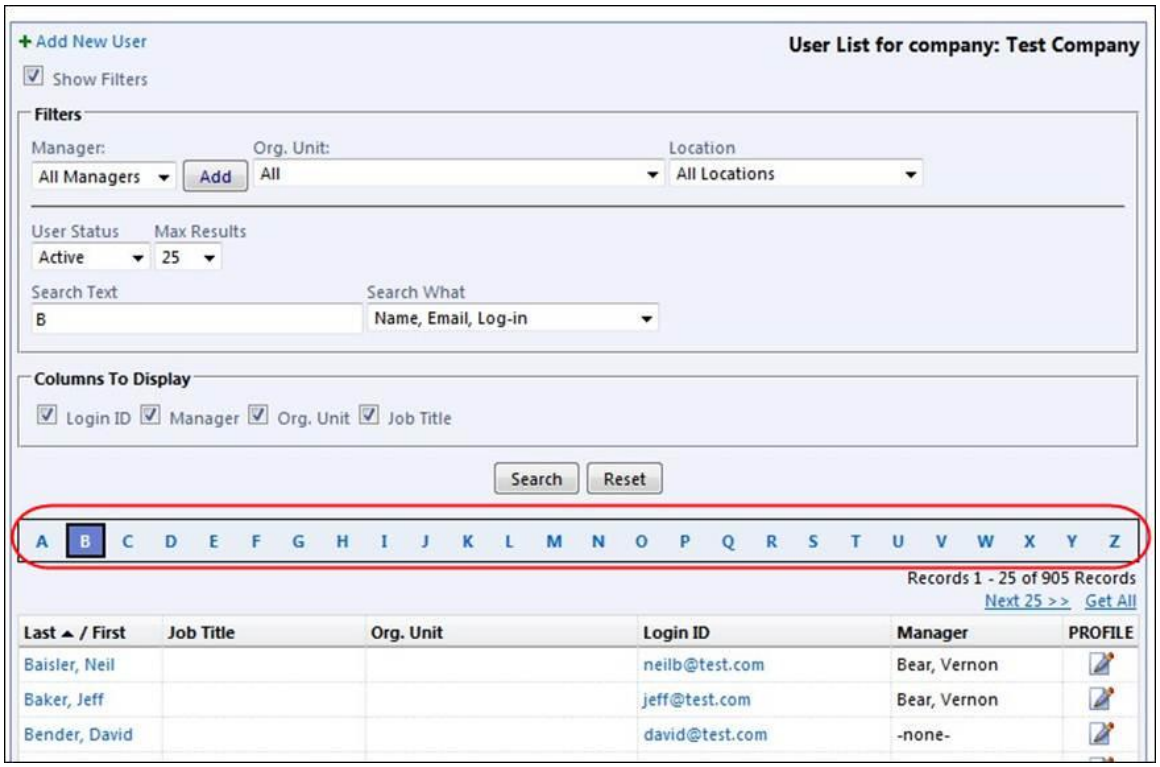
With this release, the alphabetic list on the User Admin page has changed from clickable letters to tabs representing each letter of the alphabet.

User/Customer Benefit

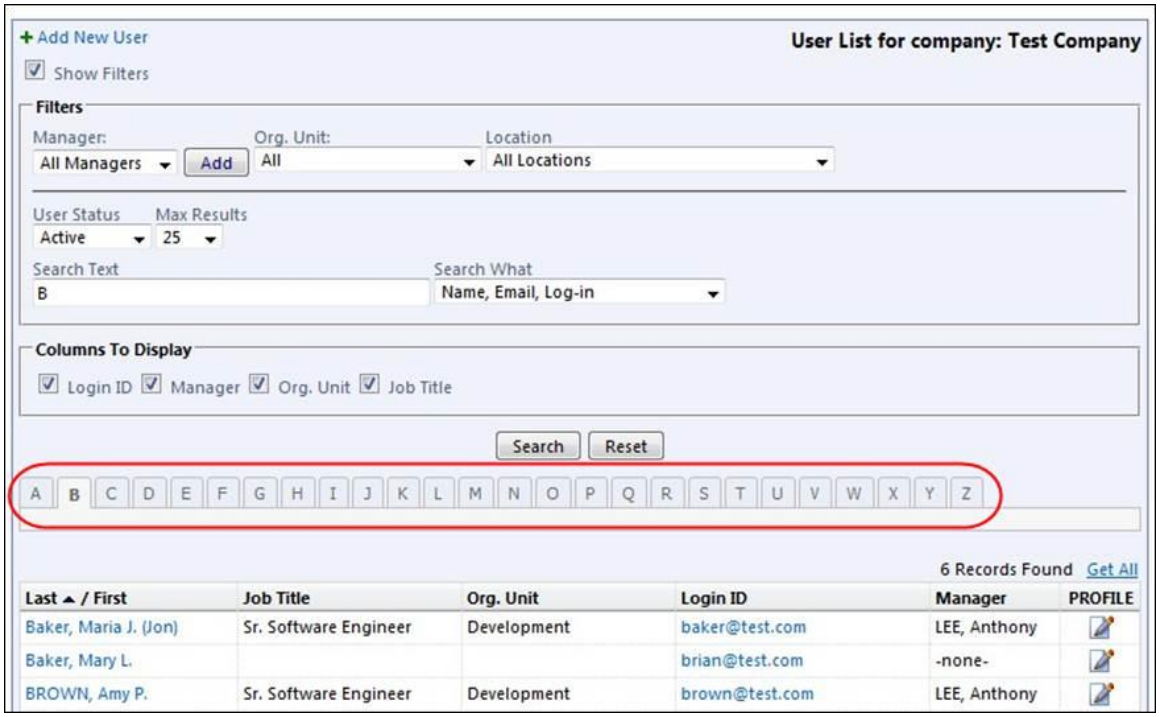
When this type of content is displayed as tabs, assistive technology users can quickly navigate to the content, easily skip over it, and easily orient themselves within it. When it is not, the user has to find it by moving through the entire page and cannot skip over it.

What the Admin Sees

Previous display:



Current display:



Configuration / Feature Activation

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

Supported Configurations

Microsoft Internet Explorer Version 7.x Retirement Schedule

Overview

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

Background

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

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

Monthly Browser Certifications

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

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

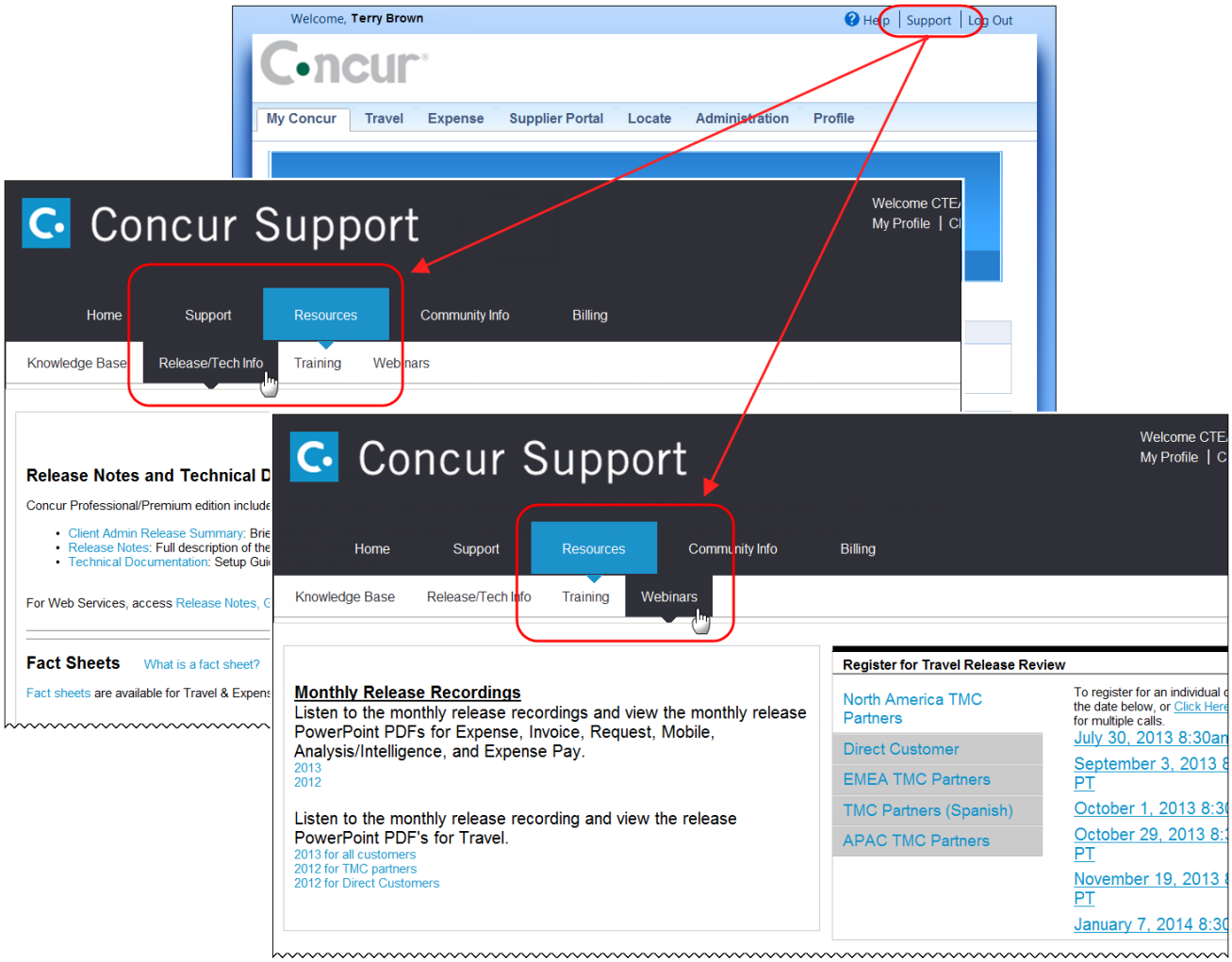
Additional Release Notes, Webinars, and Technical Documentation

Concur Support Portal

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

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

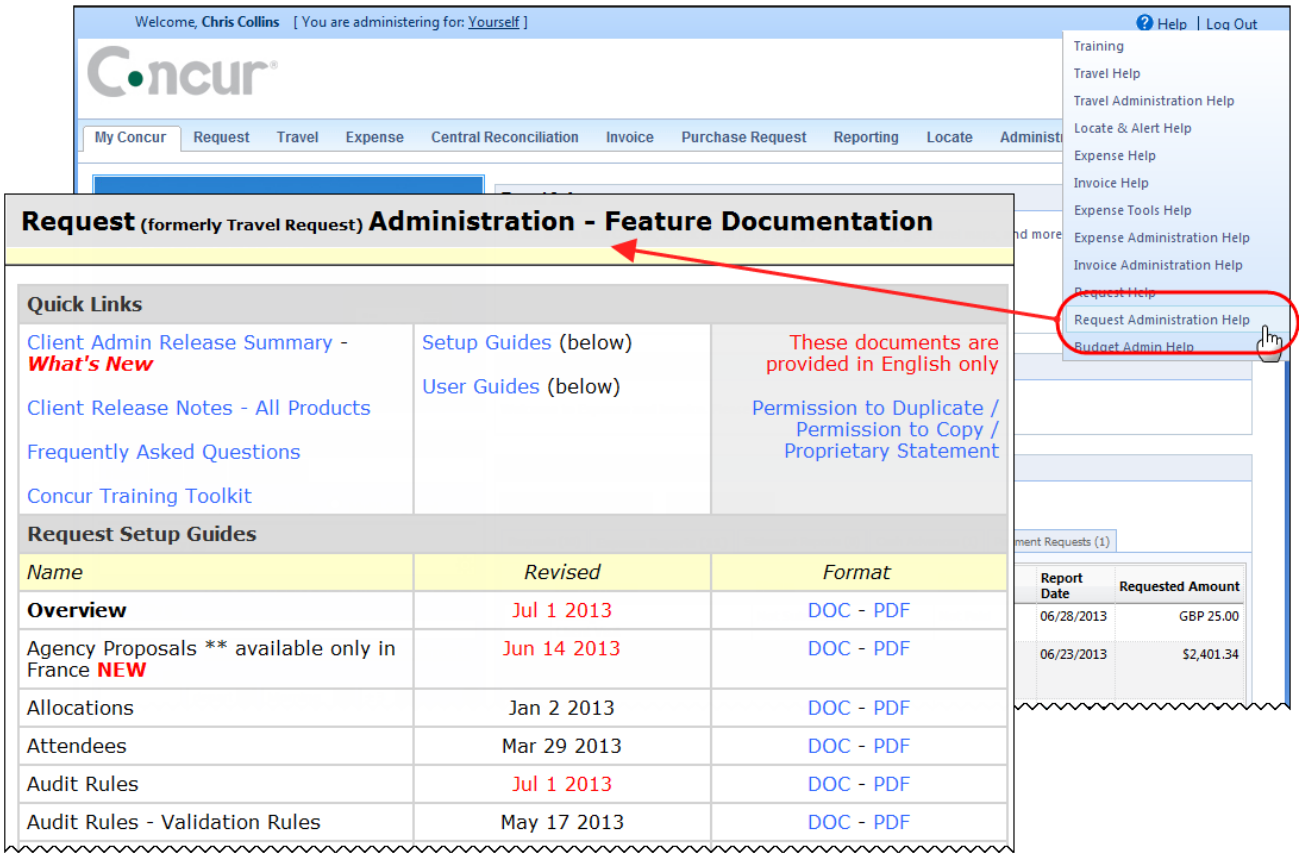
- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.



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

Online Help – Admins

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



Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
September 2014 Update #1: Wednesday, November 12, 12:30 PM PT	Concur - 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:

- Coming Soon: The Concur User Experience Evolution
- Request to Travel: Now Available
- Hotel Location Detail Field Expanded
- Agency Proposals: Proposal Expiration Date Added
- Workflow and Audit Rule: Agency Office Field Updated
- Enforce Offline/Online Policy: New Travel Request Itinerary Page
- Enforce Offline/Online Policy: Ignore Booking Policy Field Available in Audit and Workflow Rules
- Limit Approval Date no Longer Appears for Approved Requests
- New Setting to Limit Number of Requests Associated with a Single Expense Report
- Site Timeout Warning

Release Notes

Coming Soon The Concur User Experience Evolution – Professional Edition

Overview

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

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

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

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

Specific product lines impacted are:

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

Key features and enhancements are:

- Enhanced Home and Expense pages with effortless navigation and a modern consumer-based application "Look-and-Feel"
- A streamlined travel summary and booking workflow process

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

Schedule and Activation – Professional Edition

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

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

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

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

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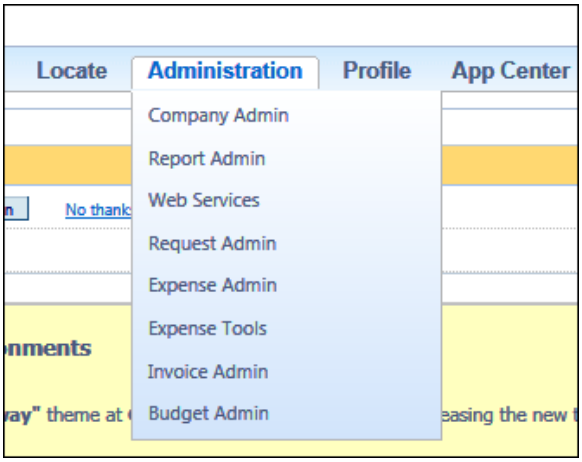
NOTE: As the availability period approaches, you will receive more information (and screen samples) about how these tasks are completed.

By Admin

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

Who can do this?

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

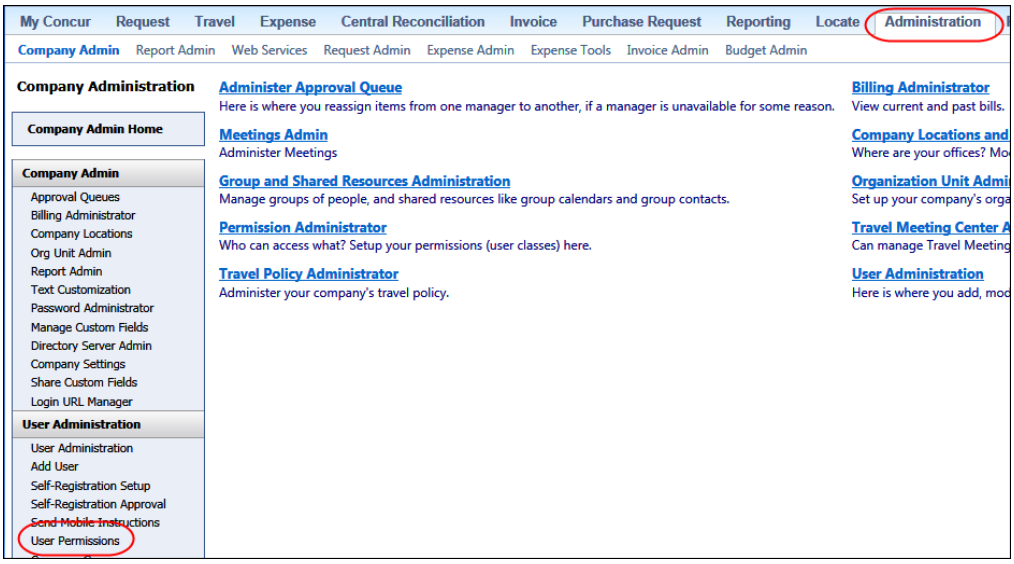


By Selected Users

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

Who can do this?

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



By Groups/Travel Classes

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

Who can do this?

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

ENTIRE COMPANY

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

Who can do this?

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

IMPORTANT!!

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

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

Resources

Here is a link for a quick look:
https://www.concur.com/en-us/introducing-concur-user-experience-updates

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

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

Request to Travel: Now Available

Overview

The Request to Travel feature allows clients with Request and Travel to book travel directly from their approved requests, without having to re-enter information or go through an additional approval process.

This feature contains the following functionality:

- New request workflow step called Approved -Pending Booking. This step is used at the end of request workflows to allow the user to book the trip in Travel.
- New request status called Approved – Pending Booking. This status is used in workflows that include the Approved - Pending Booking step. It clarifies that a request is fully approved and ready to be booked in Travel.
- The **Actions** column on the **View Request** page now includes a link labeled **Book**, which sends the user to Travel. The link is available for Requests in *Approved – Pending Booking* status.
- A new **Book** action button on **Requests** that are *Approved – Pending Booking*.
- A new page, called **Travel Request Itinerary**, which the user is directed to after clicking the **Book** link on the **View Request** page or the **Book** button on the **Request** itself. The **Travel Request Itinerary** page lists the itinerary and prompts the user for any required fields before sending them to Travel. Once the user completes the page, Travel searches for the correct trip segments to present to the user to book.
- In Travel, the trip does not require any additional approval, and is not verified against the travel policies for the company.

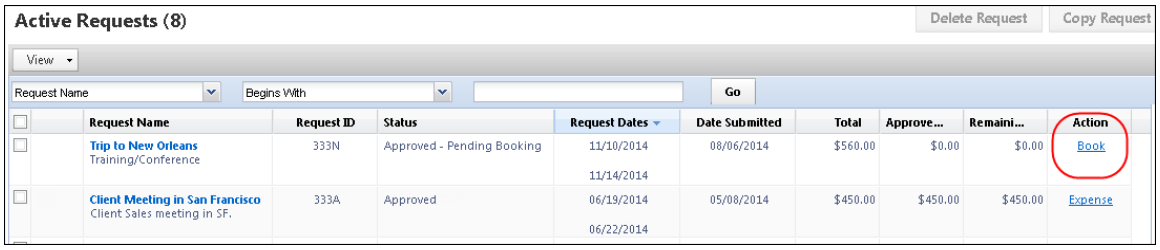
Business Purpose / Client Benefit

This feature allows a seamless pre-approval and booking process with no constraint on short approval deadlines.

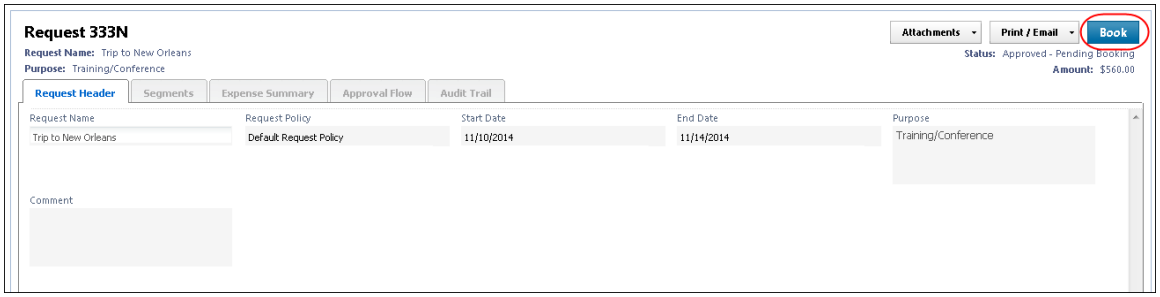
It also supports immediate purchase carriers as approval occurs before concrete booking.

What the User Sees

After the approval step in the request workflow, the user's request status is *Approved-Pending Booking*. The user sees the **Book** link in the **Action** column on the **View Request** page.



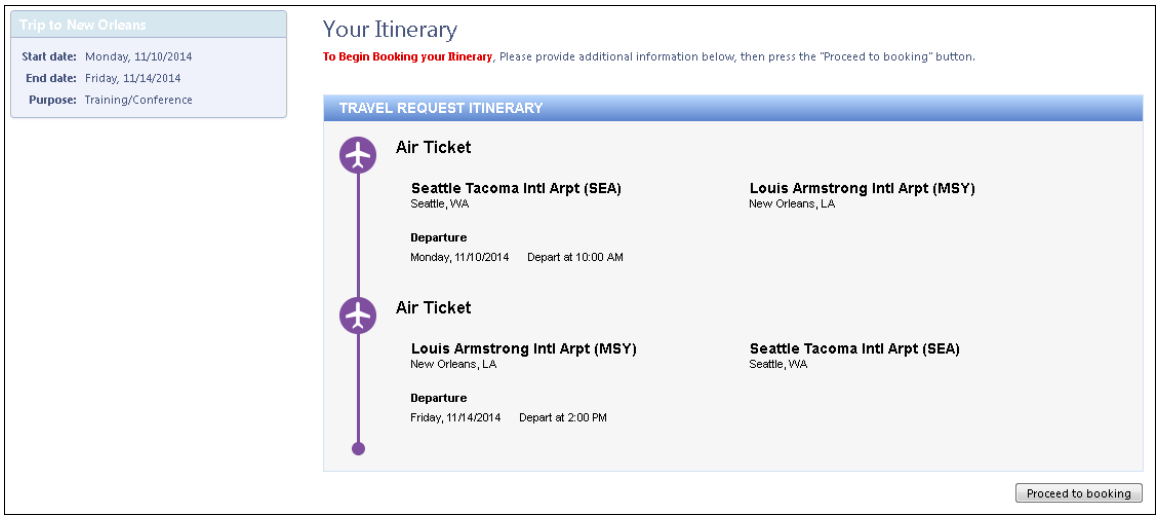
Or the **Book** button on the request page.



The user clicks **Book**, and is taken to the **Travel Request Itinerary** page.

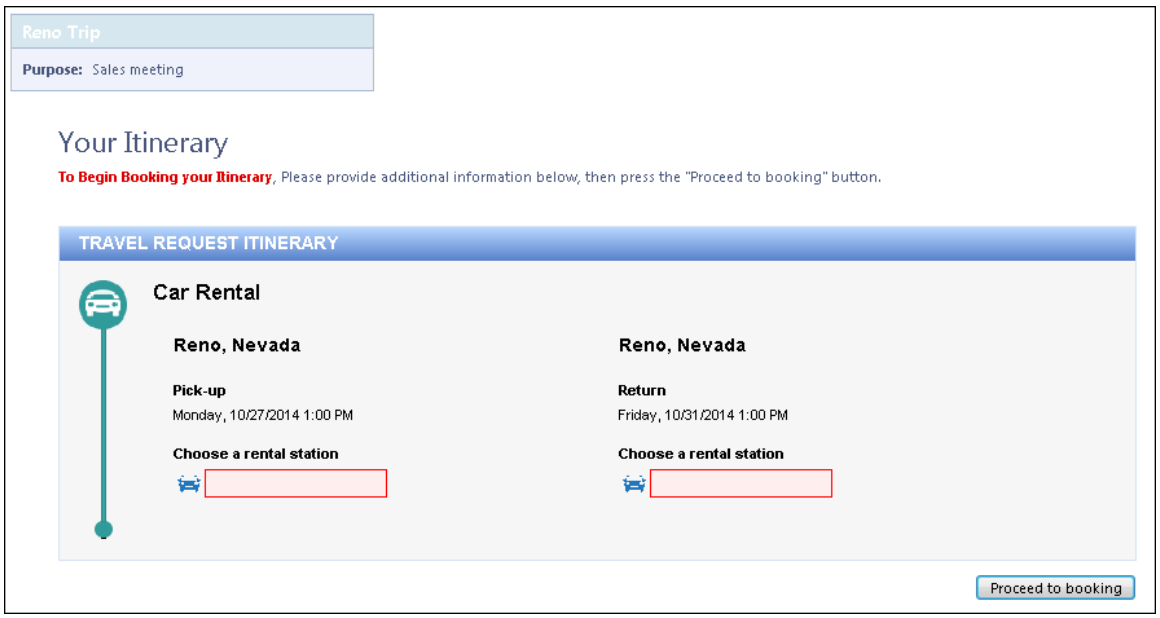
NOTE: The **Booking Switch** does not apply and the whole trip must be booked in Concur Travel. Future feature enhancements will support other booking modes.

A small box summarizes the Request main information on the left hand side. If the user has no required fields to complete, they click **Proceed to booking**.

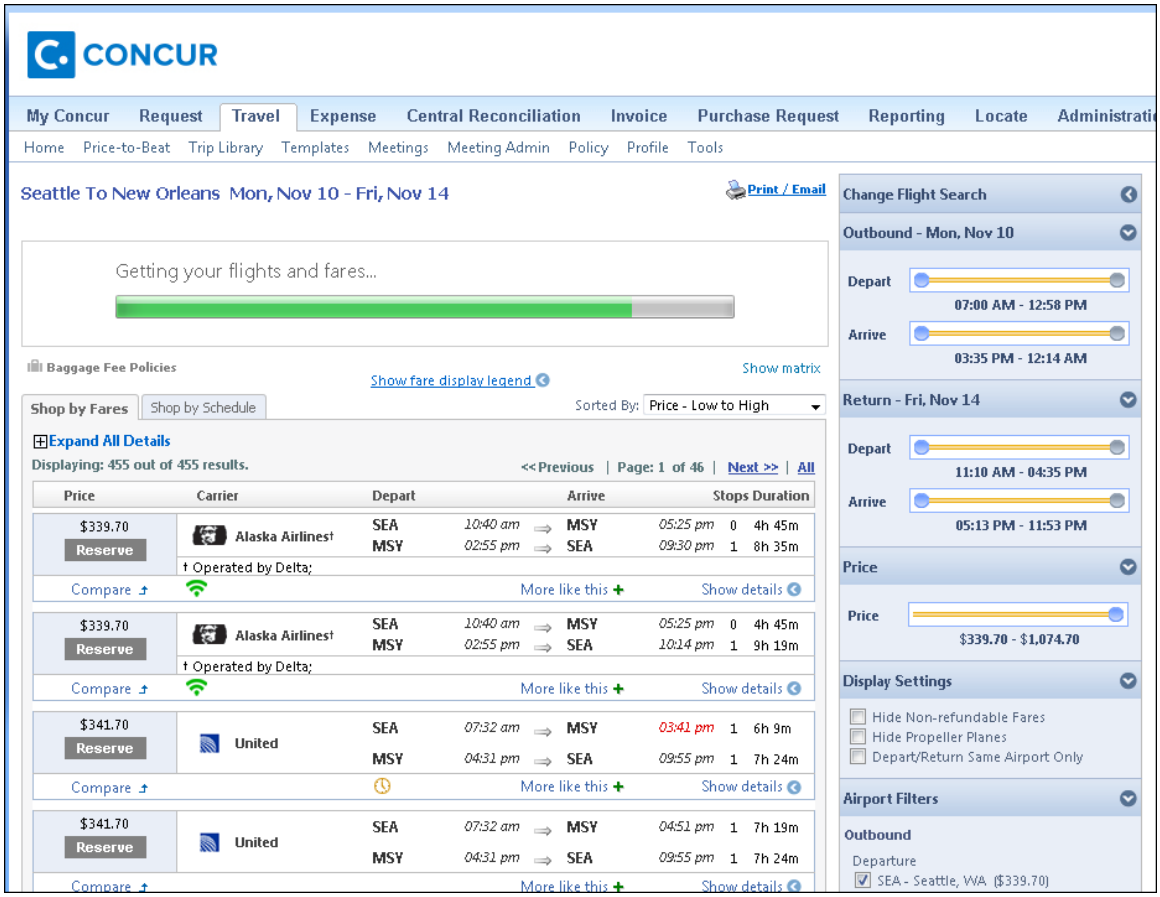


NOTE: Upcoming feature: The user will soon have the ability to select **Do not show me again** on the **Travel Request Itinerary** page. This page would then be skipped when no required information is missing, and the user sent directly to Travel.

If the user does have required fields to fill in, the fields will be highlighted on the **Travel Request Itinerary** page:



The user completes the fields and clicks **Proceed to Booking**. The Travel search results page appears.



The user is taken through the booking process, picking up the services initially defined in the Request, one after the other.

NOTE: Nothing prevents the user from reviewing his/her search criteria while booking. Concur currently considers adding controls in order to constraint the user to book what has been approved. Feel free to submit detailed **Solution Suggestions** on that item.

Once done, the user confirms his/her whole booking, which is marked as Approved.

At this stage, the itinerary updates the Request and automatically completes the Approved – Pending Booking step. The request moves to the next workflow step, if any.

Configuration / Feature Activation

This feature is available for clients who have Travel and Request integrated. The activation process is completed by the Request Configuration Administrator. Contact Concur Client Services for more information.

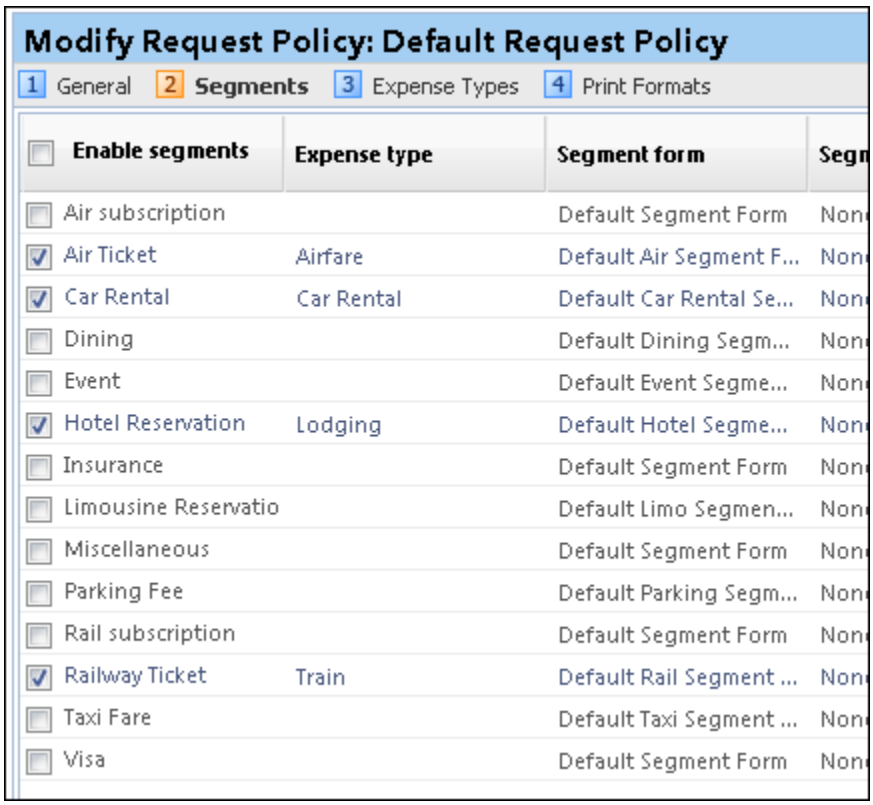
Request Policy Segments

A Request can contain both travel related and non-travel related segments.

When booking from an approved request, only the itinerary defined with the four main **Default Request Segment Types** (Air, Rail, Car, Hotel) are processed for booking.

When updating the request with the new itinerary, the default request segments are replaced by the new ones. The non-travel related segments are kept as-is.

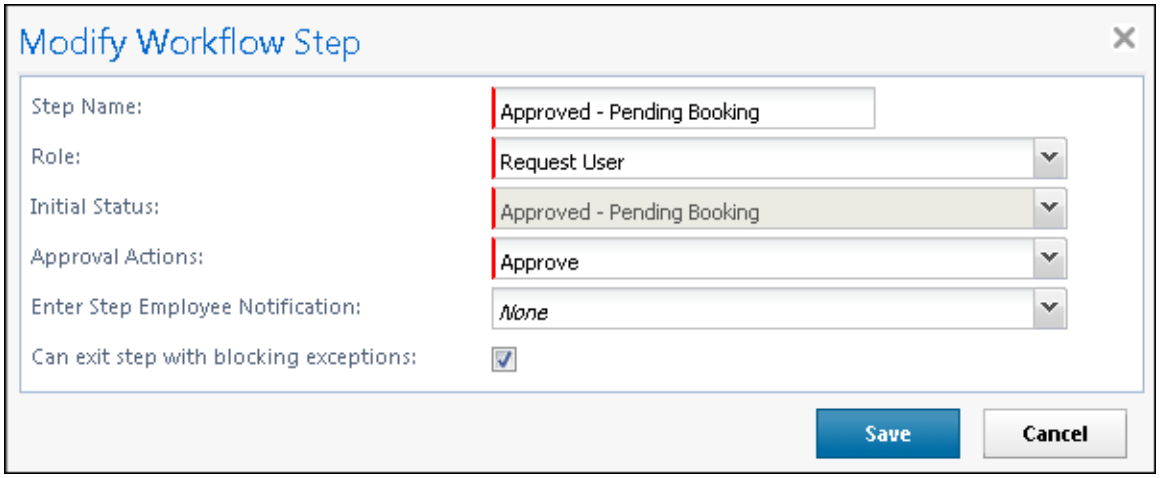
The Request administrator must enable the four main **Default Request Segment Types** on the corresponding Request Policy.



Enable segments	Expense type	Segment form	Segm
Air subscription		Default Segment Form	Non
Air Ticket	Airfare	Default Air Segment F...	Non
Car Rental	Car Rental	Default Car Rental Se...	Non
Dining		Default Dining Segm...	Non
Event		Default Event Segme...	Non
Hotel Reservation	Lodging	Default Hotel Segme...	Non
Insurance		Default Segment Form	Non
Limousine Reservatio		Default Limo Segmen...	Non
Miscellaneous		Default Segment Form	Non
Parking Fee		Default Parking Segm...	Non
Rail subscription		Default Segment Form	Non
Railway Ticket	Train	Default Rail Segment ...	Non
Taxi Fare		Default Taxi Segment ...	Non
Visa		Default Segment Form	Non

Workflow Step

Create a new step in the Request Workflow after Manager Approval, labeled *Approved - Pending Booking*. Set **Role** to *Request User*, and set the **Initial Status** to *Approved-Pending Booking*.



NOTE: This step should always be placed after all the approval steps, as the Approved- Pending Booking status indicates to the system that there are no more required approvals. Informative or procedural steps may be added after the Approved- Pending Booking step (Processor step, Budget step).

Travel Rules

UPCOMING OPTION

This feature will be available in a future release:

In order for the TMC or the Travel Manager to have a simplified Policy configuration, a new rule action, **Requires Pre approval,** will be available.

- When coming from an already approved request, services breaking the Travel rule will be displayed with a yellow **Reserve** button.
- When coming from an un-submitted request or when starting a booking from scratch, the same service will be available with a red **Reserve** button.

NOTE: For now, we recommend to avoid configuring **Requires approval** or **Requires passive approval** rules when using the Request to Travel feature, as it may not be clear for the traveler that his/her trip won't go for approval again.

Hotel Location Detail Field Expanded

Overview

In order to provide more detailed information on Hotel segments linked to Travel itineraries, Concur has updated the Hotel Location Detail field. Starting with the August 2014 release, the Hotel Location Detail field now includes the first 100 characters of the following field concatenation:
StartAddress/StartAddress2/StartCity/StartPostalCode/StartState/StartCountry

This functionality matches the existing functionality for Car Rental segments.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides more address information for Request Hotel segments that are based on Travel itineraries.

Configuration / Feature Activation

The feature is available for clients with Request integrated with Travel.

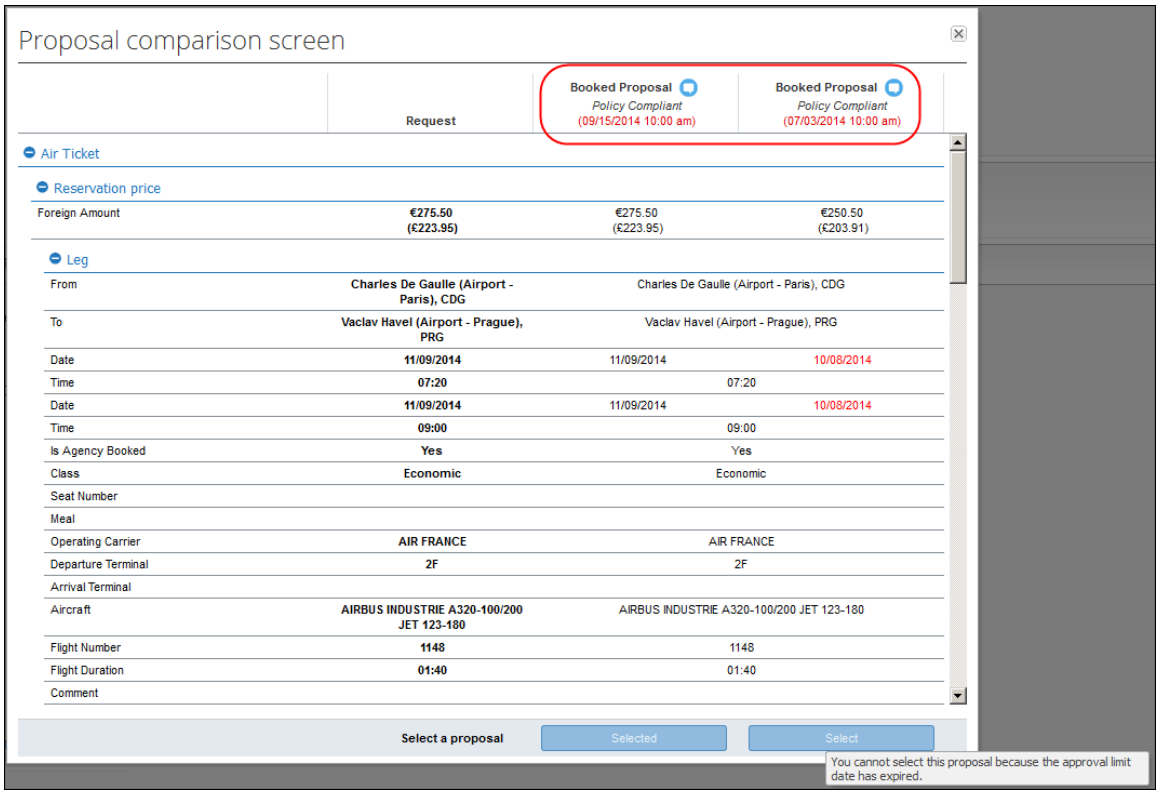
Agency Proposals: Proposal Expiration Date Added

Overview

Concur has updated the Agency Proposal comparison page to include the approval limit date for each proposal. Additionally, the page now includes an explanation tooltip when a listed proposal has expired.

What the User Sees

The user sees the approval expiration date on the **Proposal comparison screen**:



The user cannot select a proposal that has expired. If they try to click the **Select** button for that proposal, they see a tooltip explaining that the proposal has expired.

BUSINESS PURPOSE / CLIENT BENEFIT

This update clarifies the timeframe for agency proposals.

Configuration / Feature Activation

The feature is available for clients using the Agency Proposals feature.

Workflow and Audit Rules: Agency Office Field Updated

Overview

Prior to this release, the Agency Office field in Audit and Workflow Rules was displaying the numeric office key instead of the office label. The key would appear after the admin had saved the rule and returned to view it. In the August 2014 release, this issue is resolved.

BUSINESS PURPOSE / CLIENT BENEFIT

This update resolves an issue where the Agency Office was displaying the office key rather than the office label in Audit and Workflow rules.

Configuration / Feature Activation

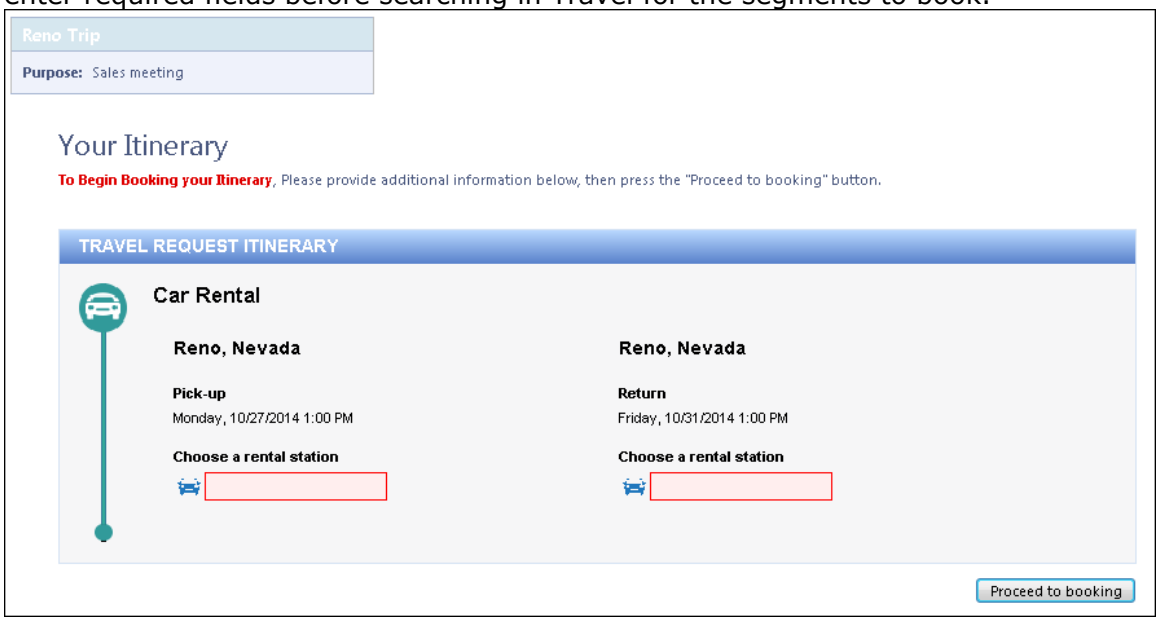
The feature is automatically on; there are no additional configuration or activation steps.

Enforce Offline/Online Policy: New Travel Request Itinerary Page

Overview

Clients with the Enforce Offline/Online Policy enabled will start to see a new page when the request contains an itinerary that must be booked in Concur Travel. The user will be directed to the **Travel Request Itinerary** page, which allows them to

enter required fields before searching in Travel for the segments to book.



After entering the required fields, the user clicks **Proceed to booking**. The user is directed to the Travel search results page for the travel segments in the request.

NOTE: This page replaces the former **Trip Template** page. In a future release, the user will be able to select **Do not show me again** on this page, which allows them to skip the page when no required information is missing.

Business Purpose / Client Benefits

This enhancement provides a smoother process when users must go from a Request into Travel to book segments, as it ensures that all required fields are correctly defined before launching the search.

Configuration / Feature Activation

The feature is on for clients using the Enforce Offline/Online policy with the booking switch criteria configured.

Enforce Offline/Online Policy: Ignore Booking Policy Field Available in Audit and Workflow Rules

Overview

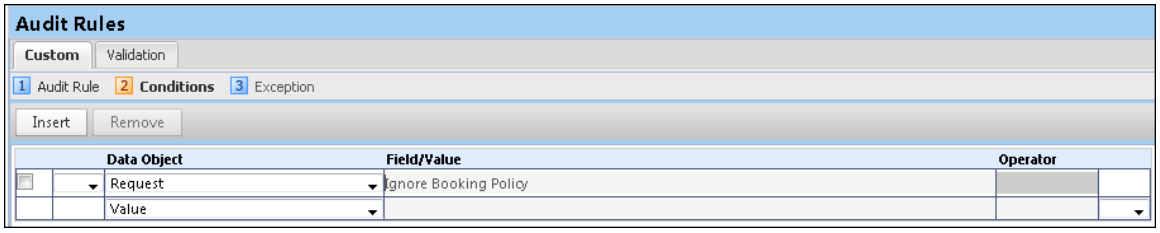
Clients with the Enforce Offline/Online Policy enabled, who allow users to decide whether to comply with the policy, can now use the **Ignore Booking Policy** field in Audit and Workflow rules.

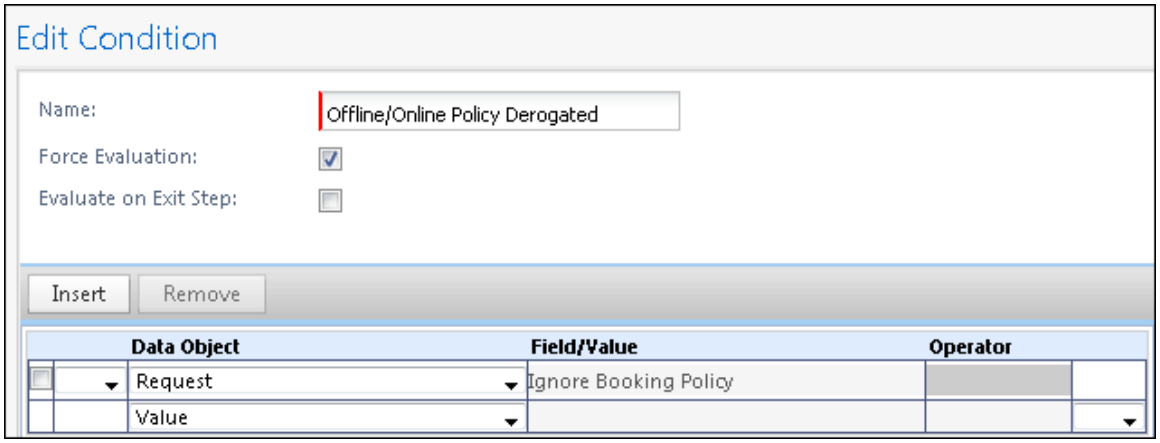
BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides an option to increase visibility and potentially adjust the approval flow when a user does not follow the requested workflow for booking a request.

Configuration / Feature Activation

The data object **Ignore Booking Policy** is available in Audit and Workflow rules, at the **Request** level.





Limit Approval Date No Longer Appears for Approved Requests

Overview

Prior to this release, the Limit Approval Date appeared on requests, even after they had been fully approved. In the August 2014 release, the Limit Approval Date will no longer appear on requests that have been completely approved.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement prevents user confusion about the state of approved requests.

Configuration / Feature Activation

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

NOTE: When using the new Request to Travel process, the trip is automatically confirmed when booking from an approved Request. The **Limit Approval Date** will not show up in Request for those trips.

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

Overview

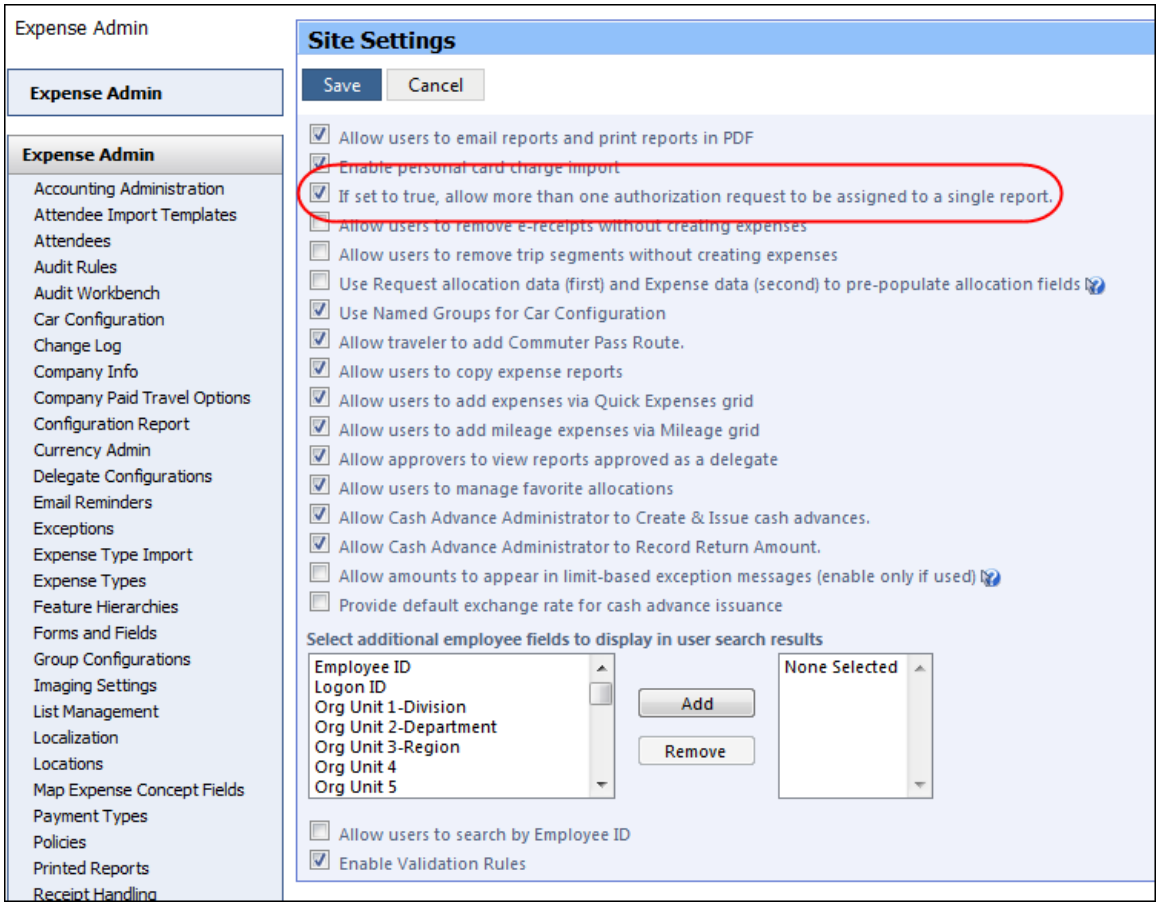
Clients who are using Request integrated with Expense now have the ability to set whether users are allowed to associate more than one request with a single expense report.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration / Feature Activation

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



New Site Timeout Warning

Overview

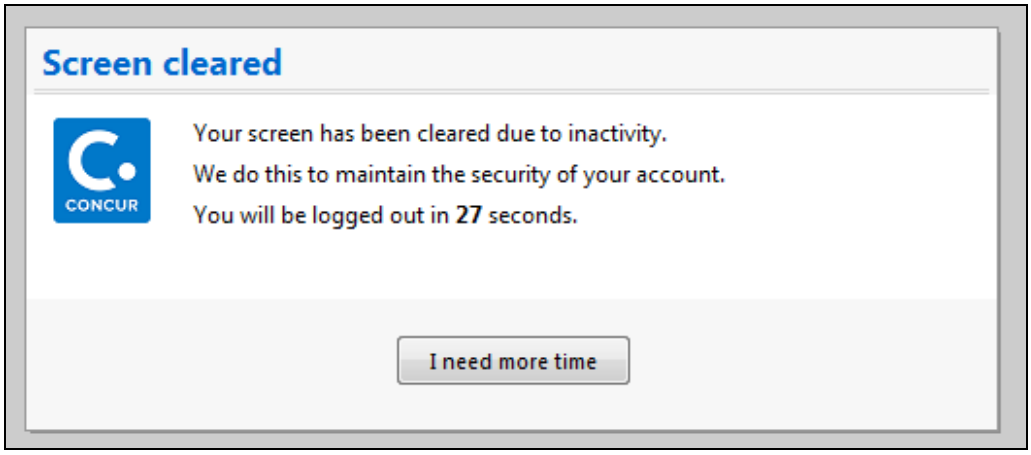
Concur now displays a new popup that allows a user to extend their session when a timeout is approaching.

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

User/Customer Benefit

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

What the User Sees



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

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

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

Configuration/Feature Activation

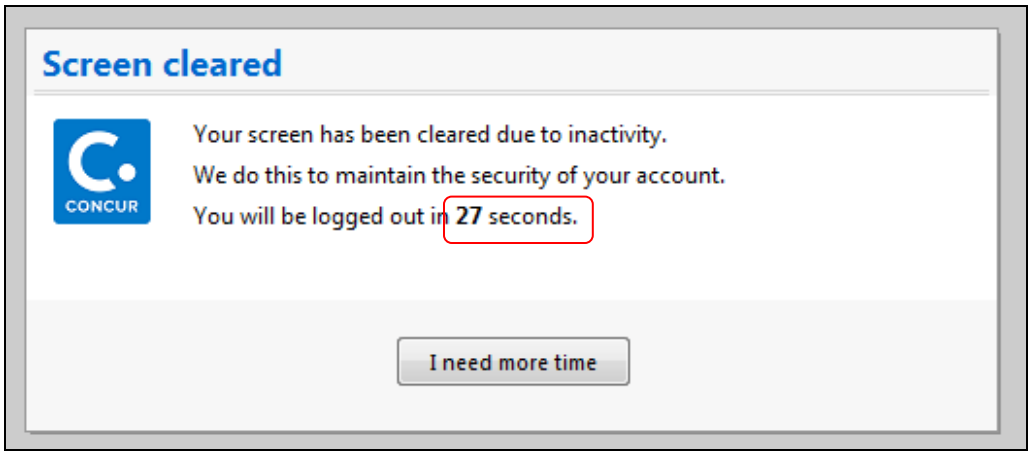
The feature is automatically on; there are no additional configuration or activation steps required.

Optional Configuration Setting

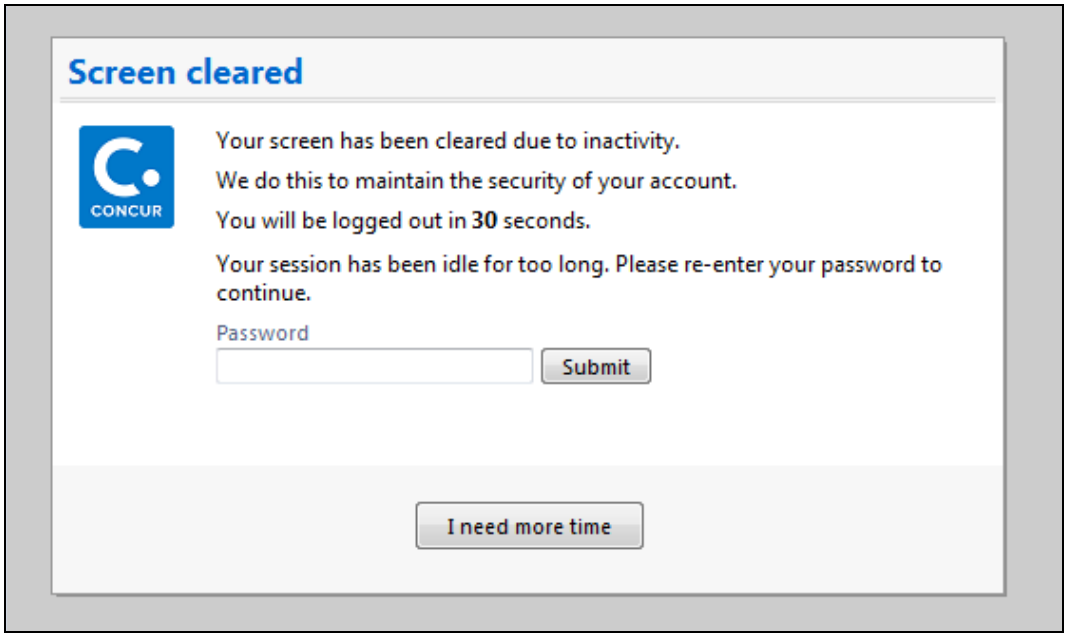
NOTE: This setting is configured by Concur. Contact Concur Client Services to update this setting for your company.

A company may optionally elect to enable an additional layer of security. An idle time setting defines the period of time from the appearance of this dialog that the user has to click **I need more time** on the timeout dialog independently from the full session timeout.

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



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



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

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

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

Supported Configurations

Internet Explorer 7 – To Be Discontinued

Overview

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

- Enhancing the user's experience for all of Concur's products by modernizing the user interface
- Complying with WCAG 2.0 AA from the World Wide Web Consortium (W3C) and Section 508 of the US Rehabilitation Act of 1973
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This refresh takes advantage of the most recent web browser technologies to provide users with a premium user experience. *As a result, IE 7 will no longer be a supported browser for users when they are transitioned to the new user interface;* ***for the best user experience, Concur recommends IE 10 or higher, as well as Google Chrome 30.0 or higher, and Mozilla Firefox 25.0 or higher****.*

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Configuration / Feature Activation

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Monthly Browser Certifications

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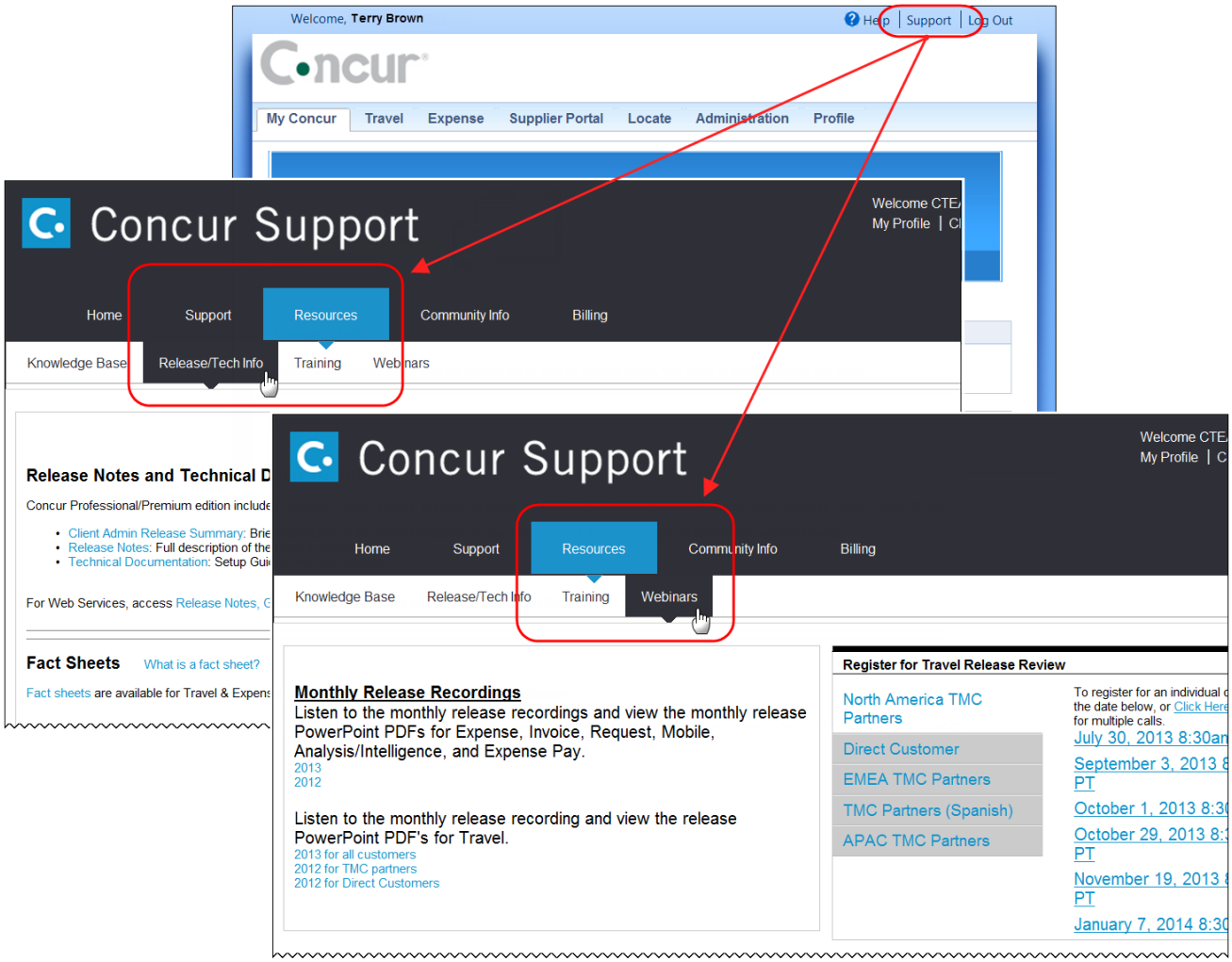
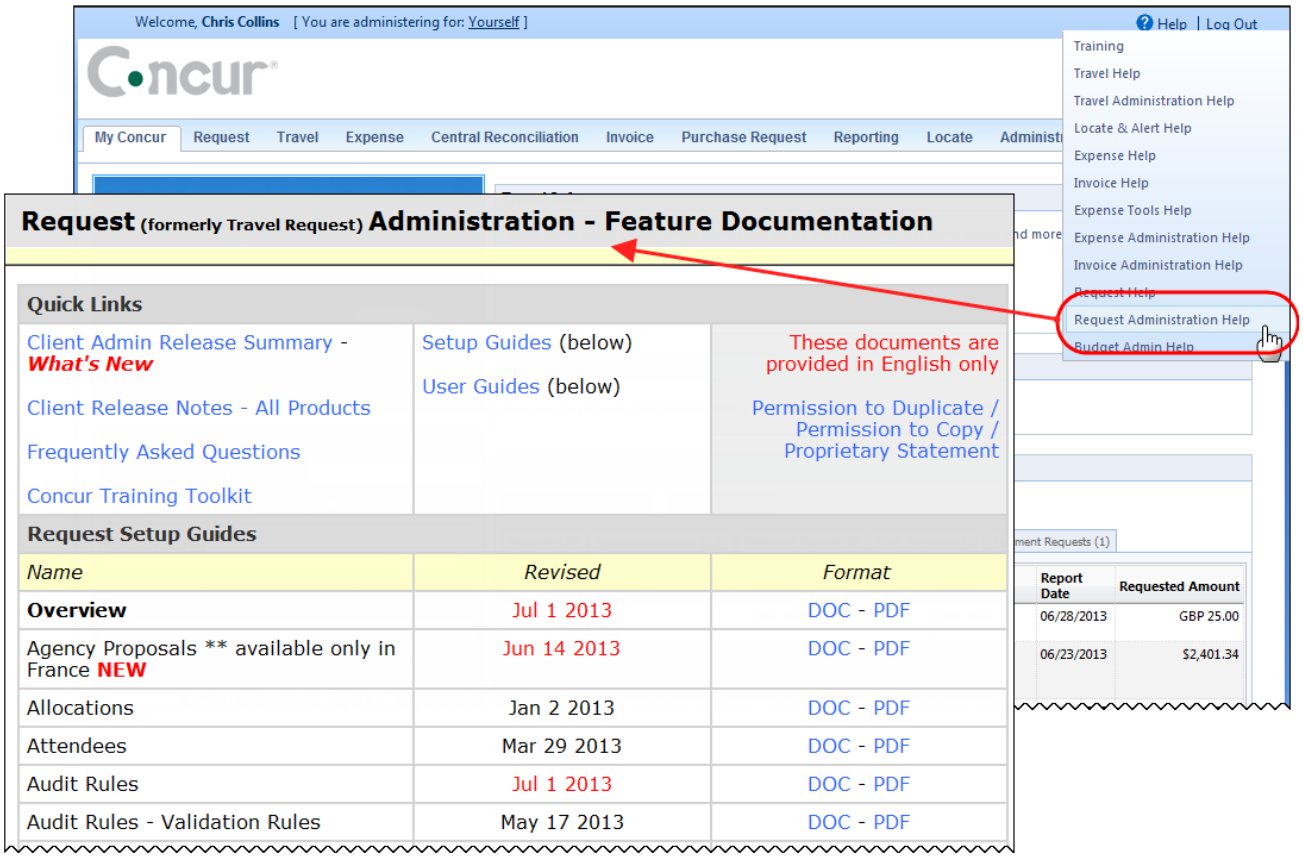


NOTE: If you use a user interface layout ***other than*** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

Online Help – Admins

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



Resolved Issues

Fixes

Key	Summary
TVR-4132	Load the offline PNR to Request even when not able to advance to next step.

Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
September 2014 Initial post: Thursday, September 11, 12:30 PM PT	Concur - 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

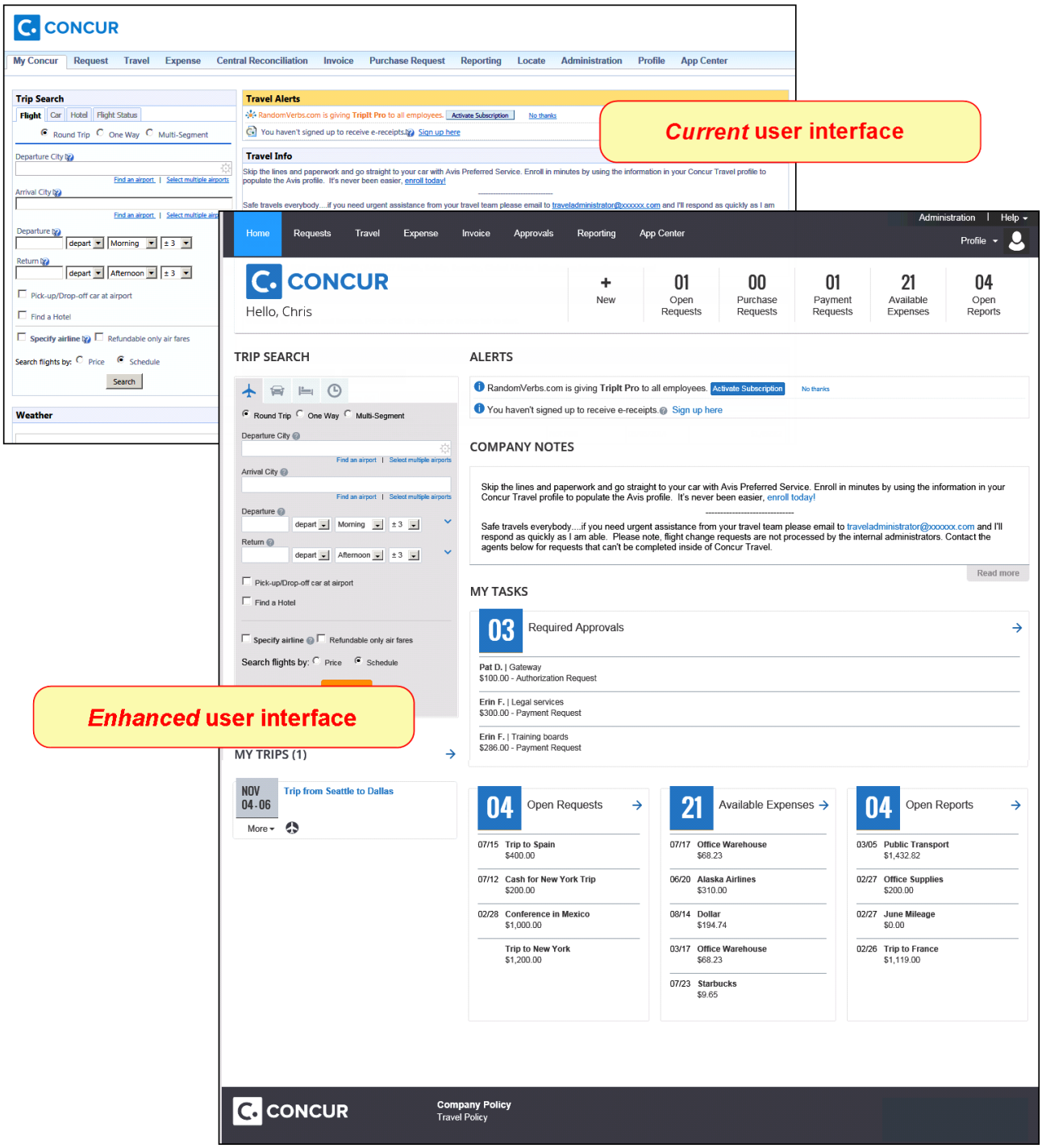
The new features are:

- Two User Interfaces: Enhanced UI
- Travel Request Itinerary Page Updated
- Audit/Workflow Rules: Policy Compliance Field Updates

Release Notes

Two User Interfaces – Enhanced UI

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



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

Quick Look

Take a quick look at the enhanced UI:
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Getting Ready – Transition Guides

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

- The steps required ***before*** transitioning to the enhanced UI
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- All of the enhancements – both significant and minor

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

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

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

Travel Request Itinerary Page Updated

Overview

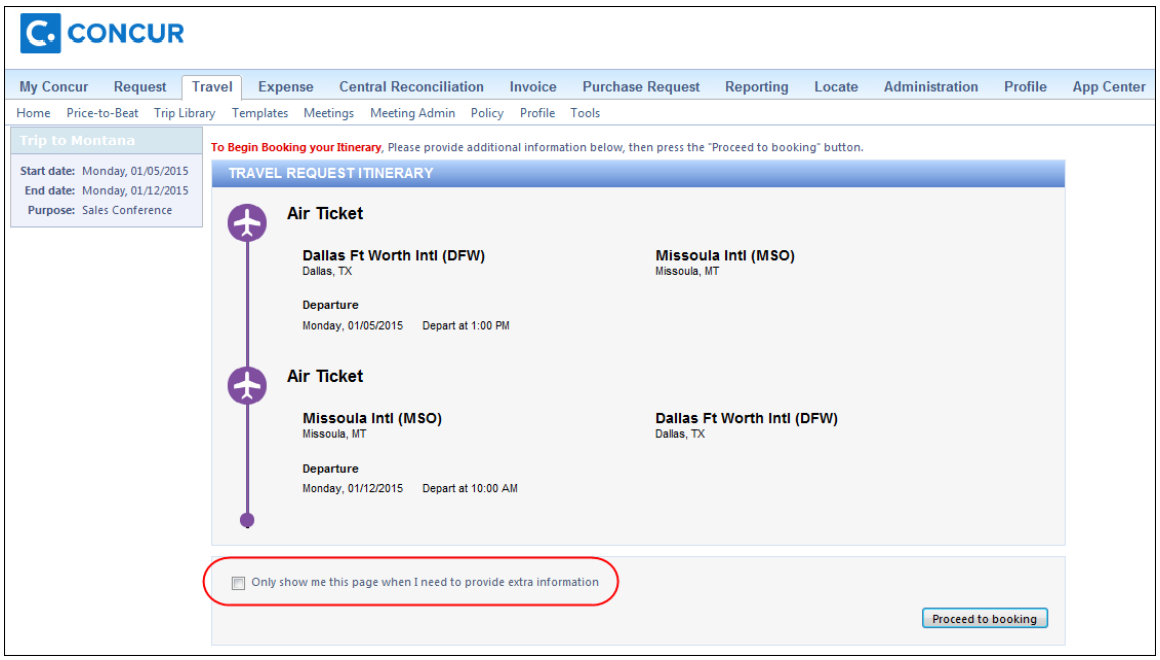
The Travel Request Itinerary page shows when users are directed to Travel from Request to book some request segments. The page includes segment details and provides highlighted fields if the segment is missing any required fields. If the segment is not missing required fields, the page still appears. This page has been enhanced to include a new check box labeled: Only show me this page when I need to provide extra information. Once the check box has been selected by a user, the page will only appear for that user if they need to provide required field information.

Business Purpose / Client Benefit

This feature provides enhanced usability for users moving from Request to Travel.

What the User Sees

The user sees the new check box on the **Travel Request Itinerary** page:



Configuration / Feature Activation

This feature is available to clients that have Request integrated with Travel, that use the *Starting in Request* process flow, or that use the Enforce Offline/Online Policy feature.

Audit/Workflow Rules: Policy Compliance Field Updates

Overview

Concur has enhanced the Policy Compliance field usage in Audit Rules and Workflow Rules. Prior to this release, the out of policy flag(s) at the ***segment*** level were available in Request segments for audit and workflow rules. They mapped to the Policy Compliance field, and:

- Applied to *segment* level Travel rules on self-booked trips and to Agency proposals
- Did not apply to retrieved offline PNRs, nor to *itinerary* level Travel rules on self-booked trips

In the September release, the out of policy flag(s) configured at the ***itinerary*** level now apply to the Policy Compliance field. The flag values are stored on all segments attached to the itinerary, so they are now available in the Request segments. When a trip contains both itinerary and segment level exceptions, the system saves the highest value (most severe) for each segment.

For Retrieved Offline PNRs, Concur now populates the segment field from a formal flag added to the PNR by the TMC, labeled POLICYCOMPLIANT. It can have a Y/N value that the system maps to the 0 – 100 scale value of the Policy Compliance request segment field. The value will be 0 if the itinerary is compliant, or 100 if the itinerary is not compliant (same rule as for agency proposals).

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides a view into the policy compliance for all kind of trips (Concur Travel, retrieved offline PNR, and agency proposal). Customers can set up a single audit or workflow rule that will apply to all booking contexts.

Configuration / Feature Activation

Clients who want to use the Policy Compliance field in an audit rule can use Administration > Request Admin > Audit Rules.

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

Clients who want to use the Policy Compliance field in a workflow rule can use Administration > Request Admin > Workflow.

📖 For more information, refer to the *Authorization Request: Workflow – General Information Setup Guide*.

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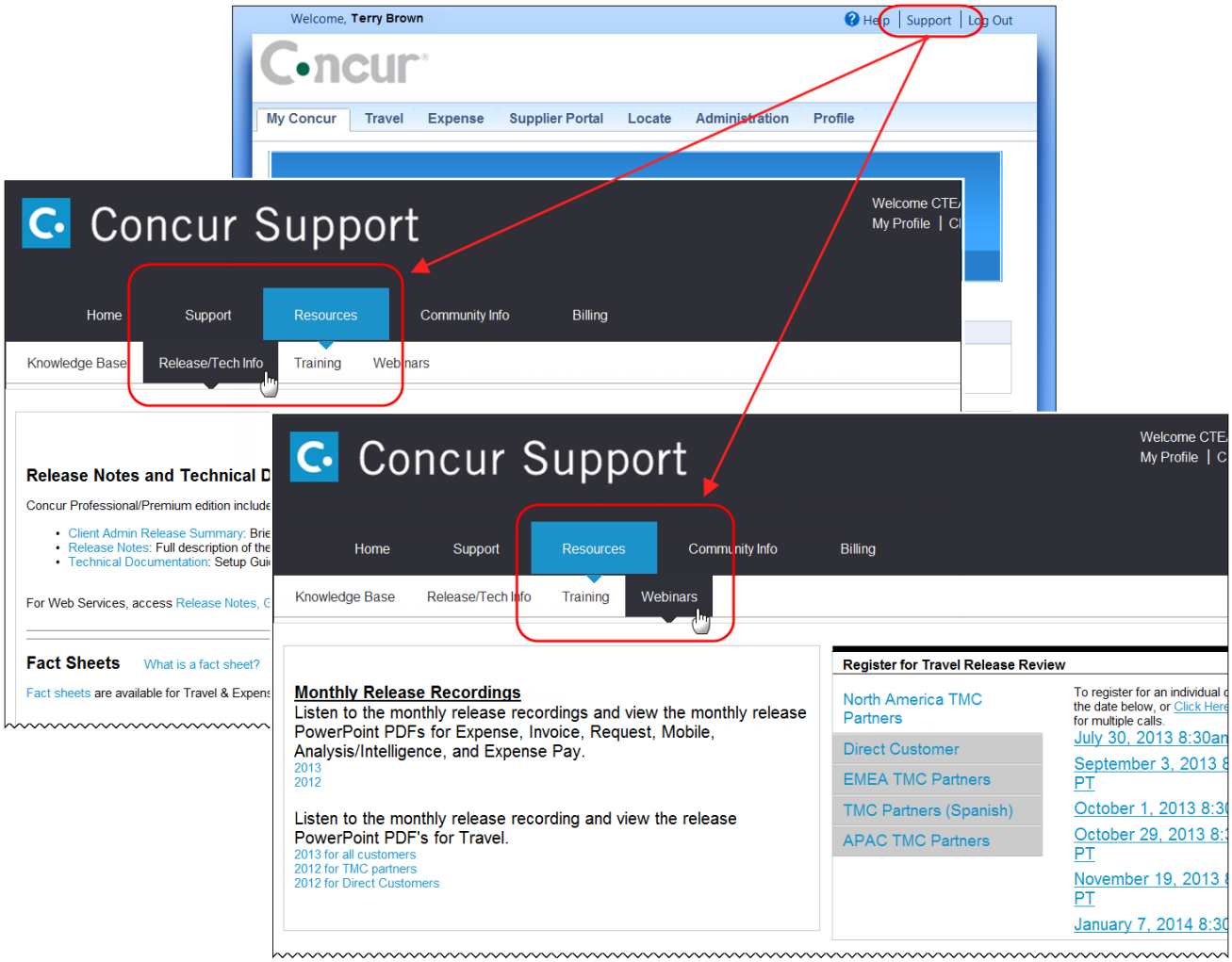

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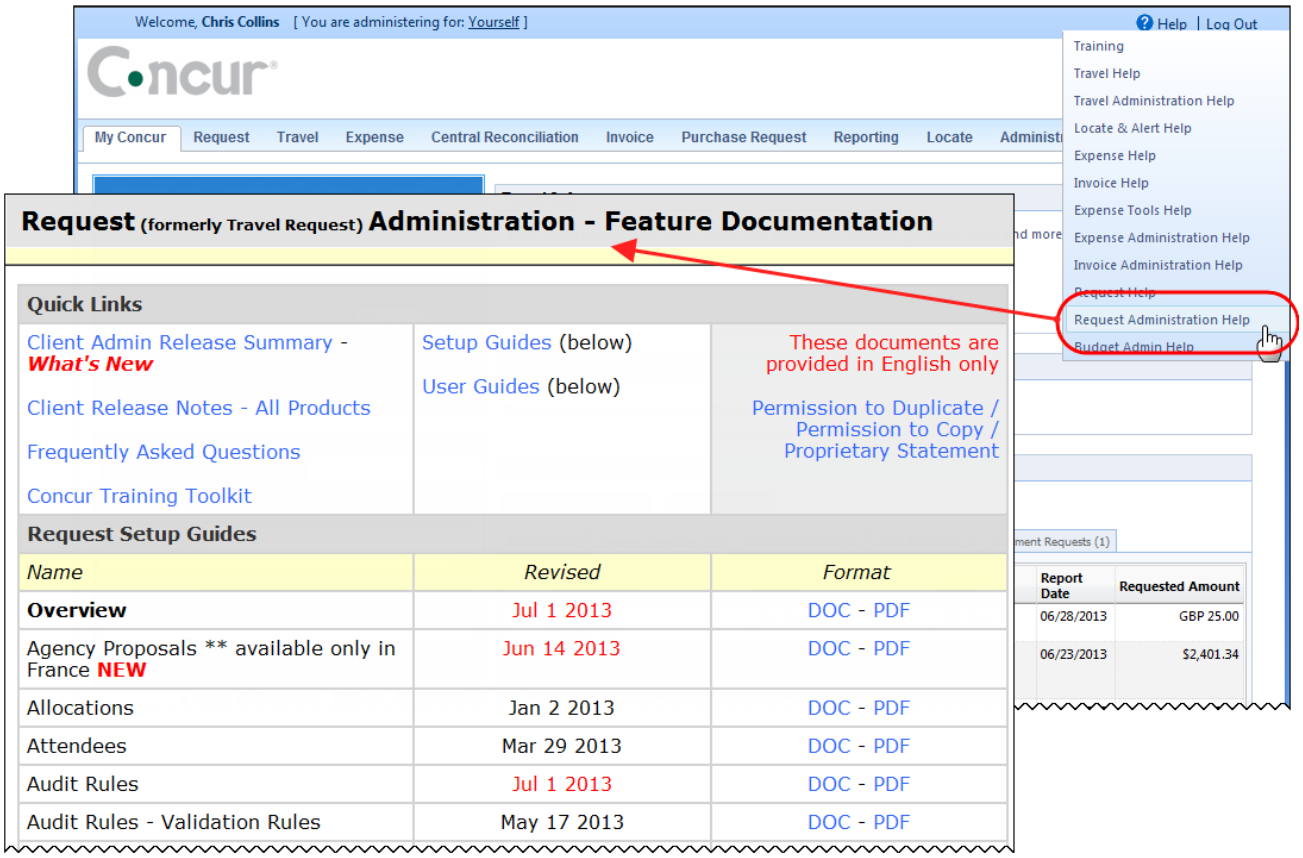

Resolved Issues

Fixes

Key	Summary
CRMC-58305	Get Travel Request Details API response didn't include the ApprovalStatusKey element.
CRMC-55506	Travel Request could not be approved.
CRMC-55856, CRMC-56559, CRMC-57751, CRMC-55645, CRMC-57748, CRMC-58410, CRMC-58854	Travel Request approved, but trip still in Pending Approval status in Travel.

Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
October 2014 Update #1: Friday, October 24, 12:30 PM PT	Concur - Client FINAL

Contents

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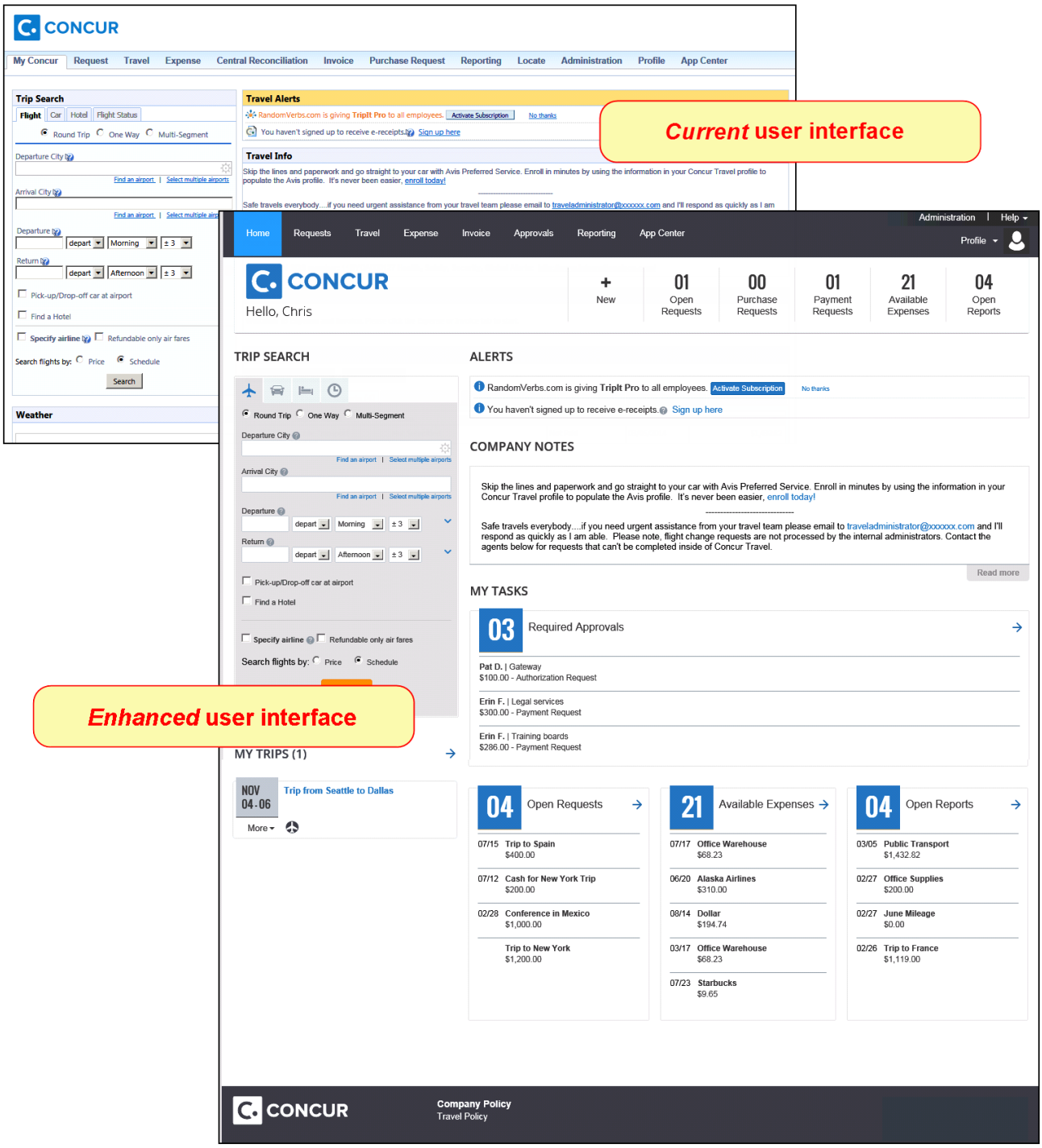
- Two User Interfaces – Enhanced UI
- User Import: Update Workflow for Inactive Approvers
- Audit Rules: Segment Data Object Now Available for Request Entry Submit Event
- Event Request: Ability to Sort Attendee List
- New Travel Rule Actions for Request
- Validity Check for Itineraries Booked Based on a Request
- Travel to Request: Always Retain Country Code
- Fixed Known Issue: Retrieve Offline PNR

Two User Interfaces – Enhanced UI

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



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1. In the *current* UI, click **Profile** > **Other Settings** (left menu).
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Preview Options

Overview

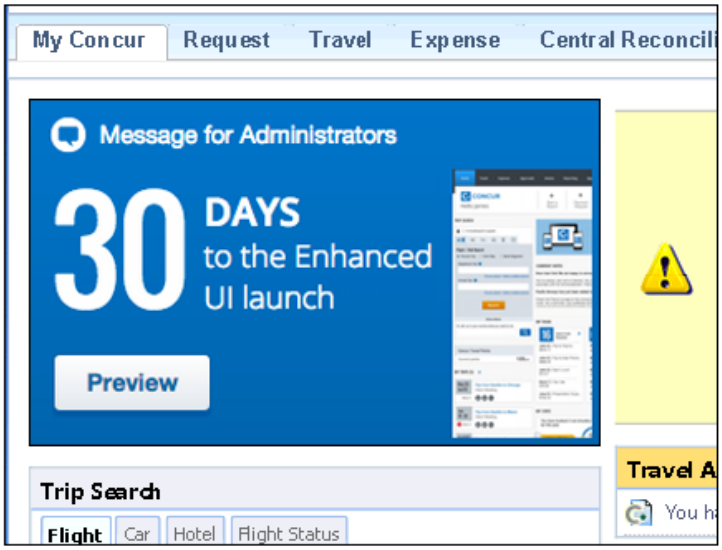
Concur has provided several options for users to become familiar with the enhanced UI and introduce it in the company during the preview period. The enhanced UI may be activated:

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

These options are available in the **User Experience Settings** page for qualified administrators, and in some cases also from selected administrative pages dealing with user or group management. All of these options are described below as well as the role/permission that an admin must have in order to make the enhanced UI available to users.

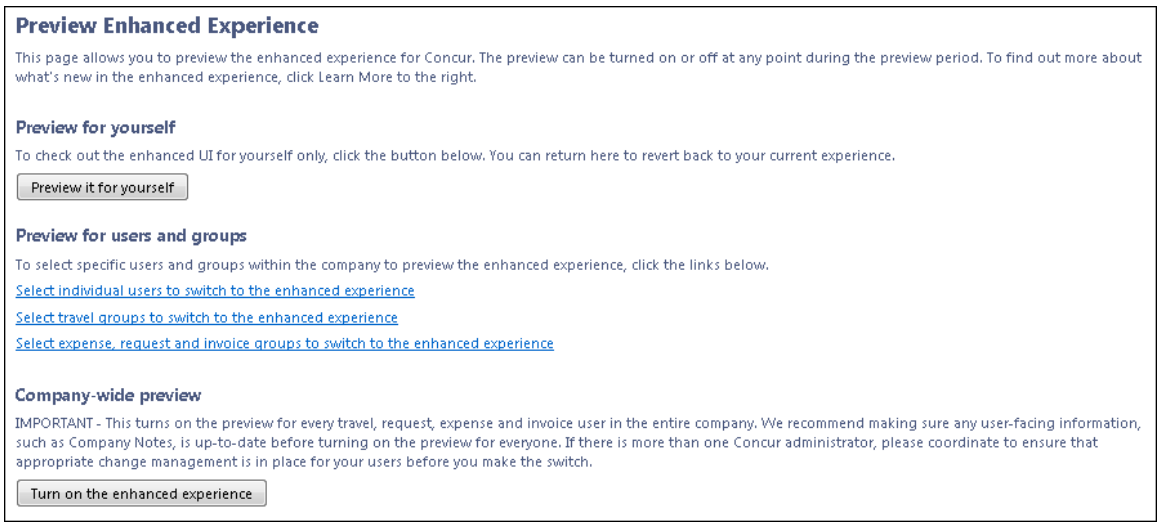
What the Admin Sees

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



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

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

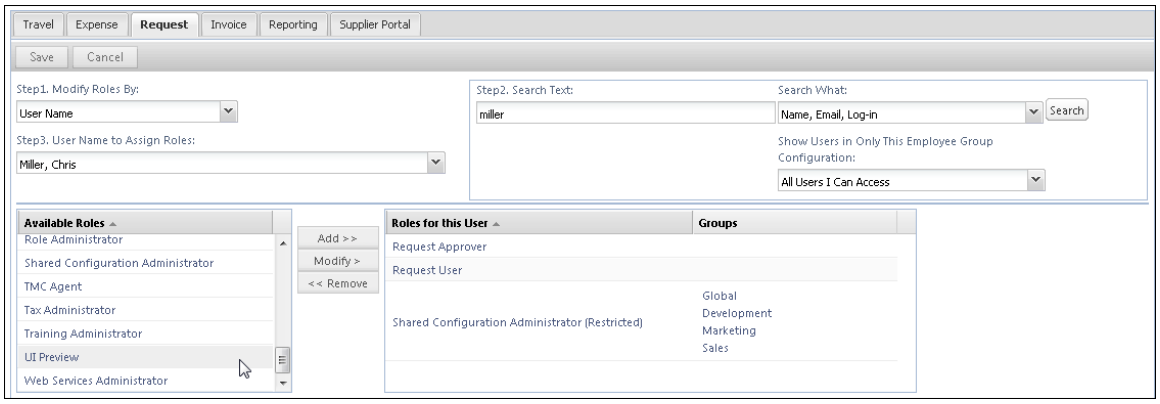


Detailed information about each of these options, and the roles that may use them, is available in the transition guide.

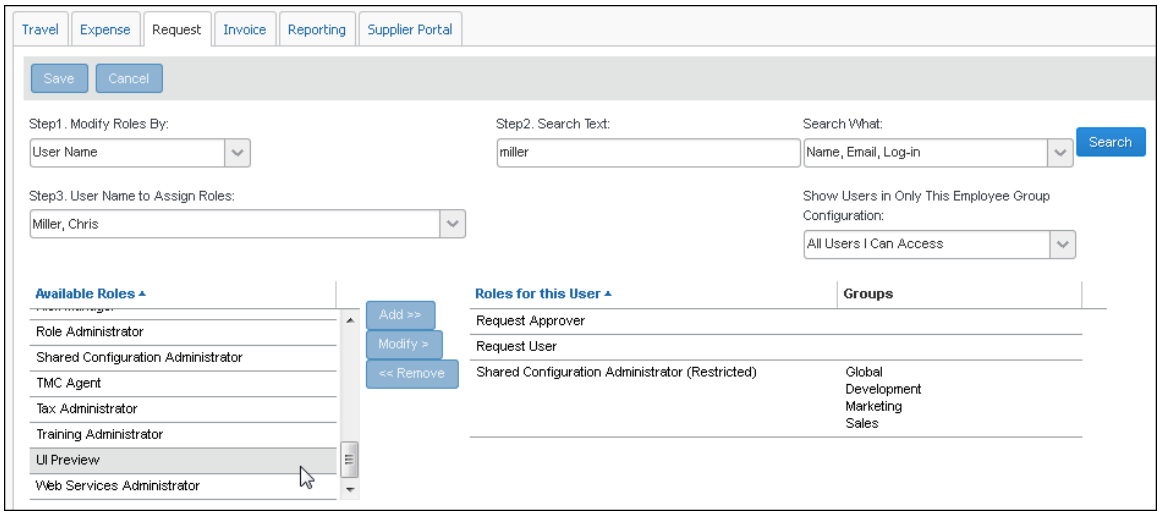
UI Preview Role

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

Current UI:



Enhanced UI:



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

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

Configuration/Feature Activation

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

Release Notes

User Import: Update Workflow for Inactive Approvers

Overview

Concur has enhanced the user import process to update the workflow for any requests that are pending an approver, if the approver has been deactivated by the import. The requests will move to the configured Approval Time Expired Action for the workflow. This functionality matches the existing functionality when an approver is deactivated within User Administration.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement prevents workflow issues when an approver must be deactivated.

Configuration / Feature Activation

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

Audit Rules: Segment Data Object Now Available for Request Entry Submit Event

Overview

Prior to this release, the Request Entry Submit event of Audit Rules did not support the Segment object. In the October 2014 release, Concur has added support for the Segment data object with the Request Entry Submit Event.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides administrators the ability to create audit rules combining segment and entry criteria when the request is submitted. One example would be to raise an exception based on amount for a given segment type.

Configuration / Feature Activation

This new data object is available in Audit Rules, not Workflow rules. The feature is automatically on; there are no additional configuration or activation steps.

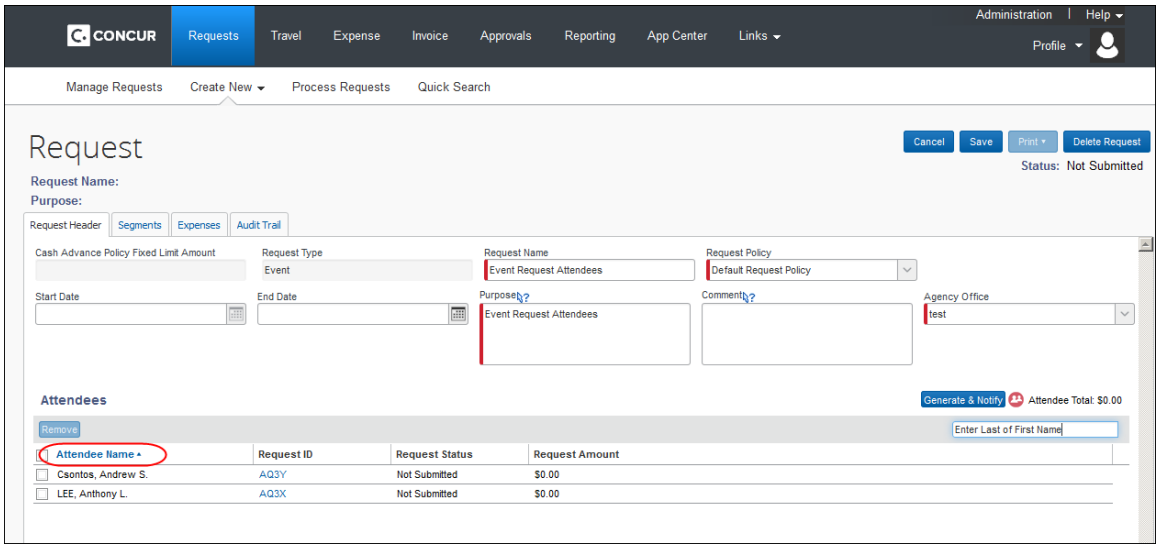
Event Request: Ability to Sort Attendee List

Overview

Concur has enhanced the Event Request functionality to allow the event request owner to sort the list of attendees.

What the User Sees

The event request owner can click the column name to sort the attendees by that column.



Business Purpose / Client Benefit

This feature allows event request owners to easily sort the list of attendees to verify that the required attendees are all included.

Configuration / Feature Activation

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

New Travel Rule Actions for Request

Overview

With this release, two new rule actions will be introduced:

- Require Pre-Approval & Notify
- Require Pre-Approval & Log

These two rule actions can be used when Request is integrated with Travel.

IMPORTANT: Note the following:

- These two options are not related to Travel's pre-authorization feature.

Background

The integration can be configured so that information flows between Request and Travel in several ways. The client can use any or all of these processes:

- Scenario 1 – Starting in Request:
  - In Request: The user creates and submits the request.
  - In Request: The request goes through the approval workflow.
  - In Travel: The user is redirected to Travel to book the segments using the Travel Wizard.
- Scenario 2 – Starting in Travel, when configured so the request is always created regardless of travel rules:
  - In Travel: The user books the trip segments using the Travel Wizard.
  - In Request: The segment information is pushed from Travel to Request and prepopulates the request. The user checks the request, adds additional details, and submits the request.
  - In Request: The request goes through the approval workflow.
- Scenario 3 – Starting in Travel, when configured so the request is created only when rules are broken that require approval:
  - In Travel: The user books the trip segments using the Travel Wizard.
  - If approval is required, then refer to Scenario 2.
  - If approval is not required, then the trip is directly confirmed.
- Scenario 4 – Enforce Offline/Online Policy:
  - For this process, it does not matter where the request starts. When the user submits the request (in Request), the offline/online setting evaluates and determines if any part of the booking must be completed in Travel. If so, the user is redirected to Travel.
  - In Travel: The user books the trip segments using the Travel Wizard.
  - In Request: The segment information is pushed from Travel to Request and prepopulates the request. The user checks the request, and submits it again.
  - In Request: The request goes through the approval workflow.

New Rule Actions

The new rule actions define the process if associated travel rules are broken.

NOTE: In the following examples, be aware that since Request is integrated with Travel, there is no approval in Travel. Whenever approval is required, it is completed in Request.

For Scenario 1 – Starting in Request, which means the request is already approved by the time the user is redirected to the Travel Wizard:

If a user selects a flight, car, etc. that breaks a *Require Pre-Approval & Notify* or *Require Pre-Approval & Log* rule

Then:

The *Require Pre-Approval & Notify* rule responds like *Notify Manager*; the *Require Pre-Approval & Log* rule responds like *Log for Reports*.
– and –
The **Select**/**Reserve** button is yellow.
– and -
The user is required to select a violation reason, which is stored in the itinerary.

For the *Require Pre-Approval & Notify* rule, if a default approver is stored in Travel, then he/she will be notified by email. No additional action is required, however, and the trip is confirmed.

If a Travel admin runs reports for *Notify Manager* or *Log for Reports* violations, these transactions appear.

For Scenario 2, 3, and 4 (which means the request is ***not*** approved by the time the user is using the Travel Wizard):

If a user selects a flight, car, etc. that breaks a *Require Pre-Approval & Notify* or *Require Pre-Approval & Log* rule

Then:

The rule responds like *Require Approval*.
– and –
The **Select**/**Reserve** button is red.
– and -
The user is required to select a violation reason, which is passed back to the Request approver.

If a Travel admin runs reports for *Require Approval* violations, these transactions appear.

User/Customer/TMC Benefit

When Request is integrated with Travel, the client can use any ***or all*** of the booking processes described above. These rule actions can be used with any and all scenarios – instead of having several different actions for each of the different scenarios.

TYPICAL USE CASE

Within a company, there are several groups of users. Some groups must obtain preapproval before making travel plans. For other groups, preapproval is not required. Other than that, all groups are the same – they could use the same configuration, with the same rule class.

With these two new rule actions, the groups can be in the same rule class and obtain the desired results based on whether or not preapproval is required. The Travel admin does not have to create a rule class for each group.

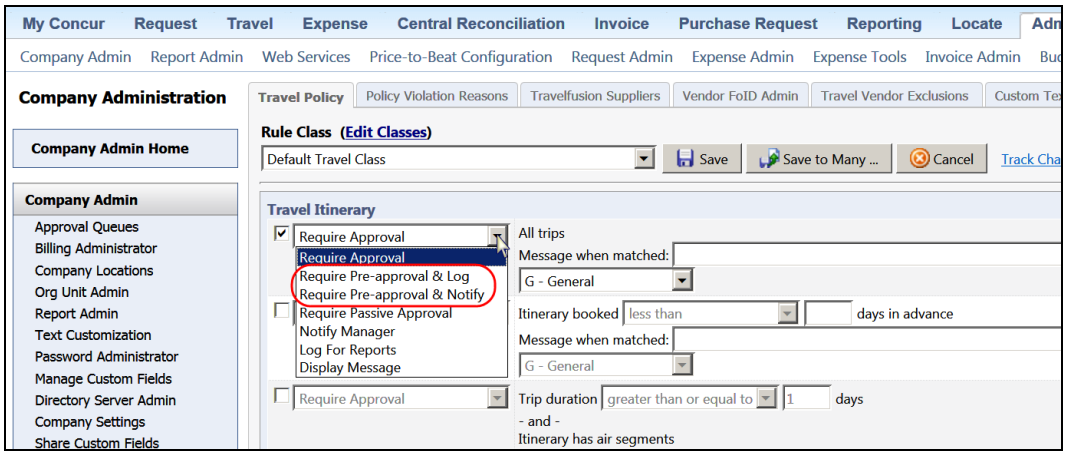
What the User Sees

There is no difference in the user experience.

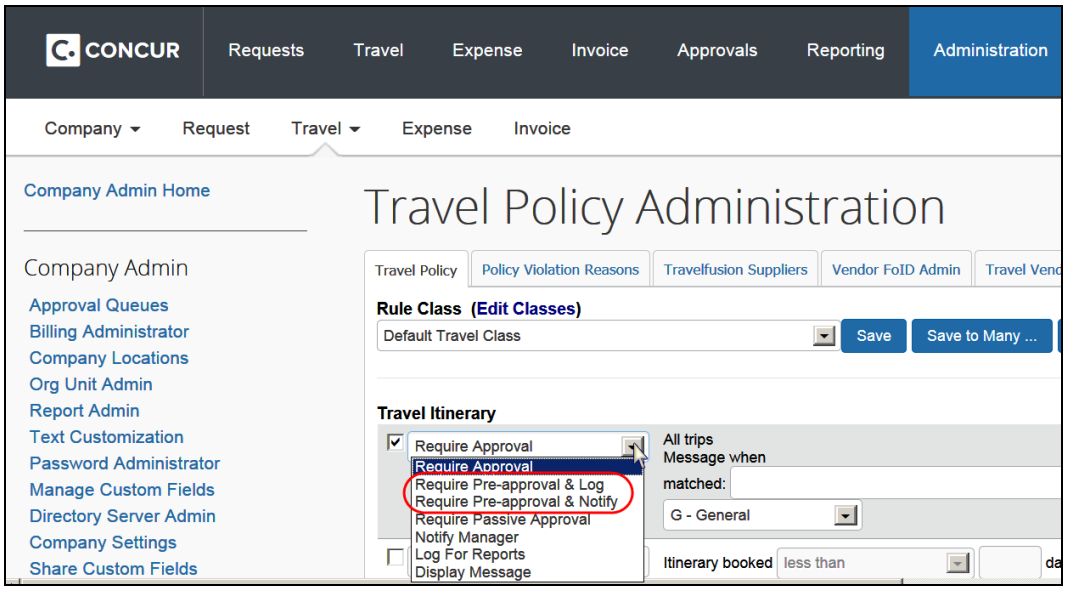
What the Admin Sees

The Travel admin sees the new rule actions on the Travel Policy tab of the Travel Admin page:

Current UI:



Enhanced UI:



Configuration / Feature Activation

This feature is auto-on. There are no configuration steps.

The admin can use the new rule actions any time after this release.

For more information, refer to the *Concur Travel: Company Administration User Guide*.

Validity Check for Itineraries Booked Based on a Request

Overview

Concur has enhanced the Request to Travel process flow to include a validation when the request enters the Pending Booking workflow step, or would be sent to Travel due to the Enforce Offline/Online feature. The request is reviewed by Concur, and if the itinerary is not supported in Travel, the user will not be directed to Travel. The user will be notified that he/she cannot complete the booking in Travel, and if possible, the user will be directed to a different booking option.

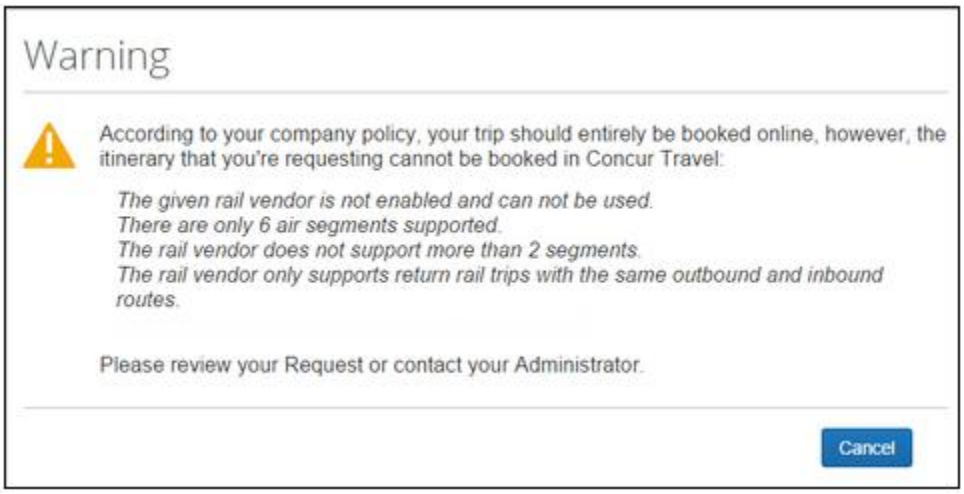
Business Purpose / Client Benefit

This feature prevents users from attempting to book an itinerary in Travel when it is not supported (For example, too many legs, or inconsistent rail vendors).

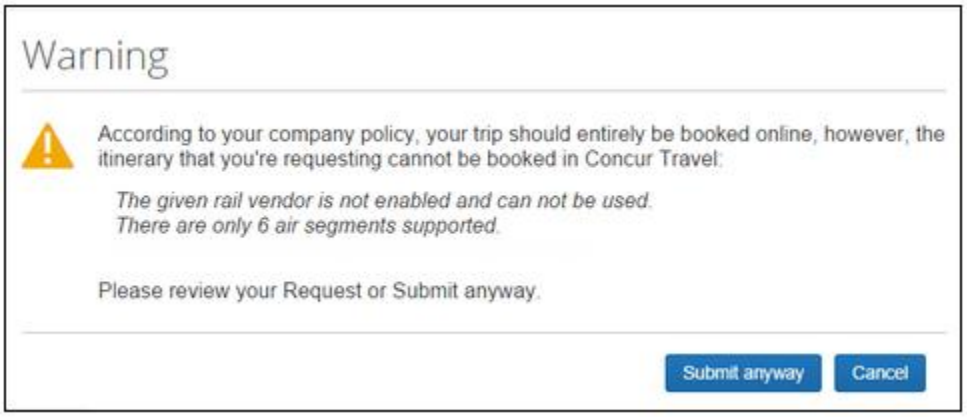
What the User Sees

Screenshots are provided as examples, and include an unusual number of errors. In most situations, the user is smoothly processed from Request to Travel. The error messages generally will not contain more than one or two items.

- **Enforce Offline / Online Policy without Derogation**: When submitting the Request and the itinerary is not supported in Travel



- **Enforce Offline / Online Policy with Derogation**: When submitting the Request and the itinerary is not supported in Travel.



- **Book on an approved Request**: When clicking on Book and the itinerary is not supported in Travel.

Configuration / Feature Activation

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

Travel to Request: Always Retain Country Code

Overview

When a user moves an itinerary from Travel to Request, sometimes the city does not match a known location in Request. Prior to this release, for Air or Car segments, the segment in Request would not contain any location data. In the October 2014 release, Request will now retain the country code information for Air and Car segments, even if the city specified in a segment does not match an existing location in Request. Hotel segments always retain the country information.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature supports country-level risk management and audit/workflow rules for Air and Car segments.

Configuration / Feature Activation

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

Fixed Known Issue: Retrieve Offline PNR

Overview

Some clients are experiencing consistency issues when PNRs are pushed to both the Reporting and Offline Approval Queues, and then processed to Request.

Concur has created a fix to allow TMCs to continue using the automated queue placement of PNRs to Reporting Queue when also using the Retrieve Offline Approval queue to send PNRs to Request. The fix will be applied on a client-by-client basis.

Configuration / Feature Activation

Contact Concur Client Services if you are experiencing this issue.

Supported Configurations

Internet Explorer 7 – To Be Discontinued

Overview

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

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

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

- Modern consumer based application look-and-feel that will be applied across all products
- Consistent terminology, iconography, and interaction across web and mobile applications
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This refresh takes advantage of the most recent web browser technologies to provide users with a premium user experience. *As a result, IE 7 will no longer be a supported browser for users when they are transitioned to the new user interface;* ***for the best user experience, Concur recommends IE 10 or higher, as well as Google Chrome 30.0 or higher, and Mozilla Firefox 25.0 or higher****.*

What the User Sees

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

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

Configuration / Feature Activation

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

Monthly Browser Certifications

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

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

Additional Release Notes, Webinars, and Technical Documentation

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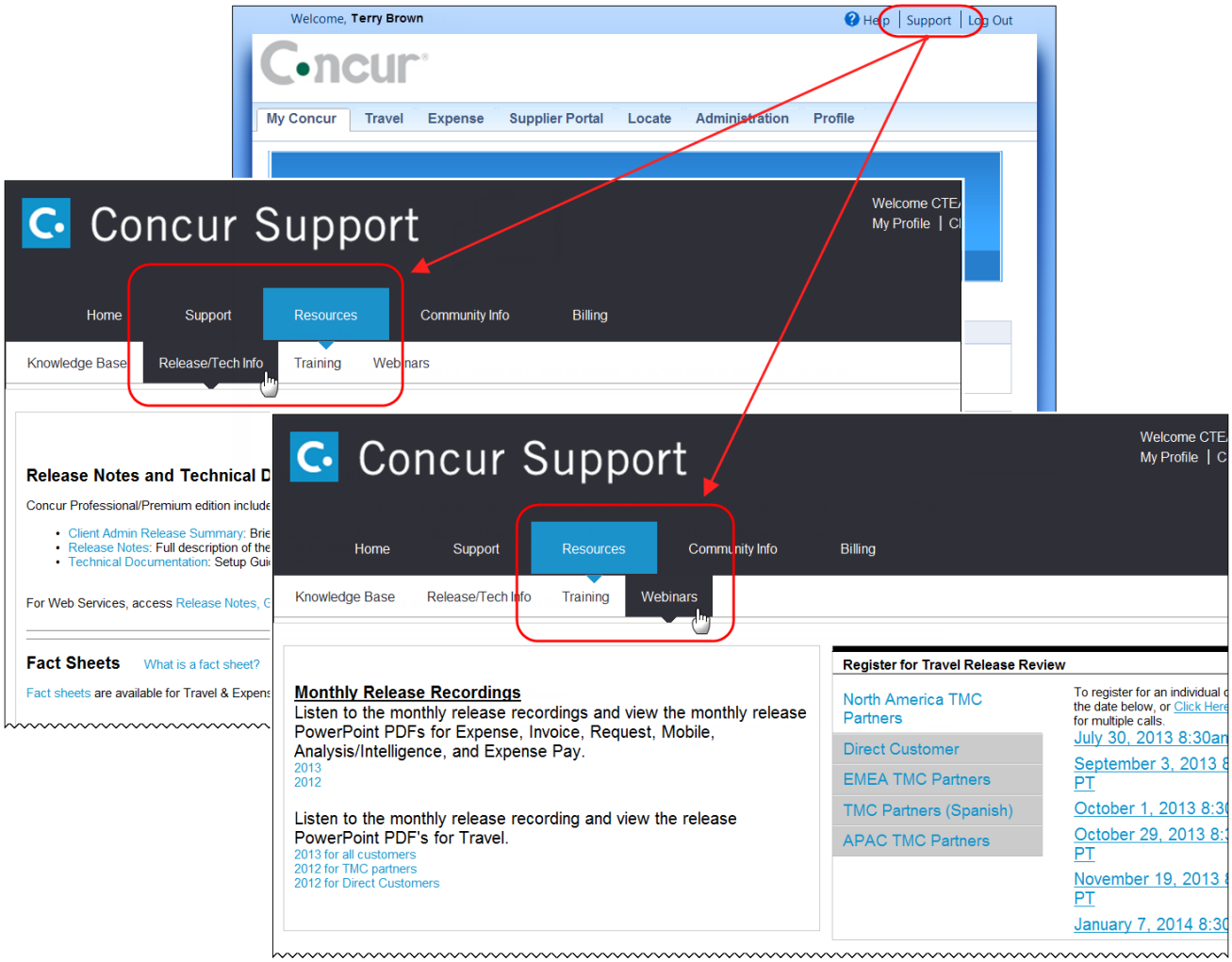
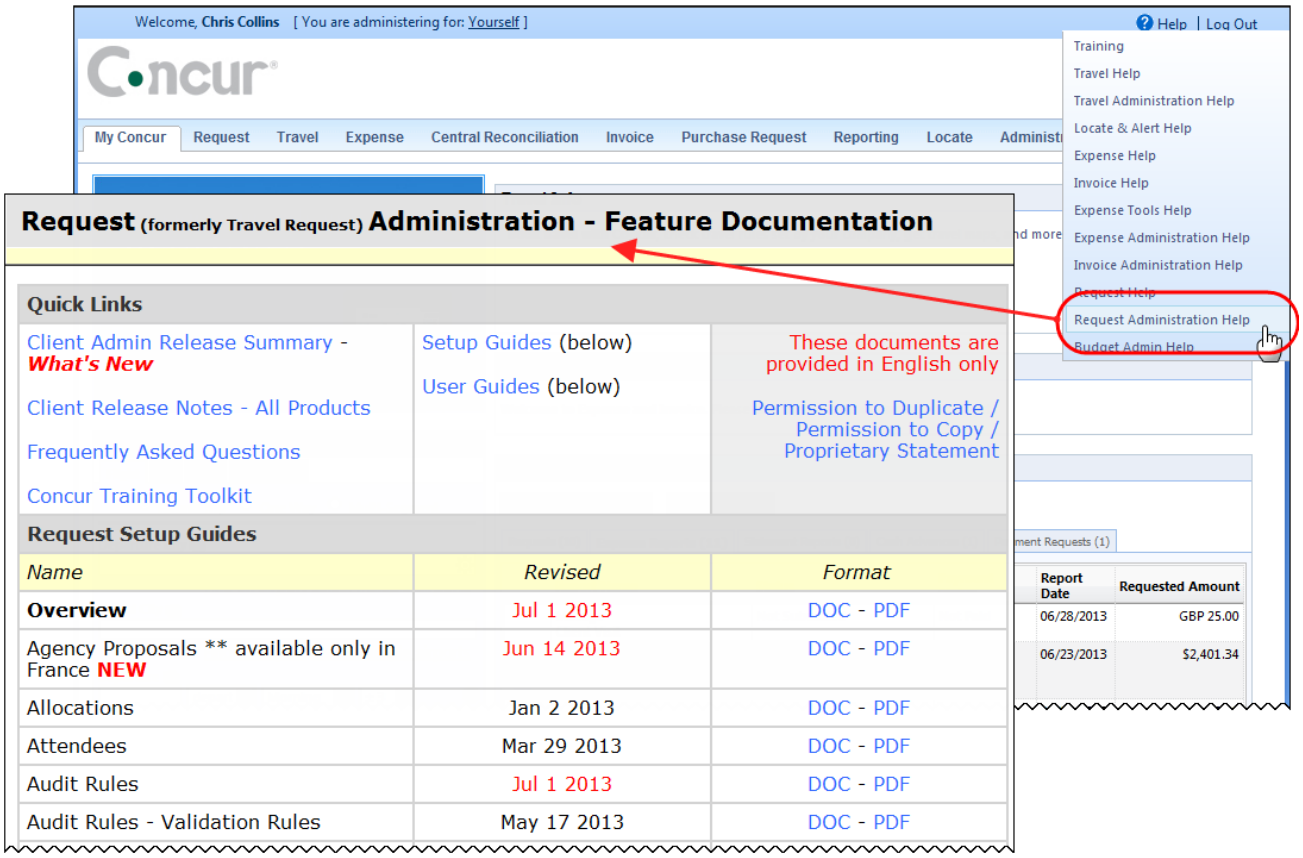


NOTE: If you use a user interface layout ***other than*** Blue Sky (set on the travel configuration page), be aware that you have to click **Help** in order to access the **Support** link.

Online Help – Admins

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



Resolved Issues

Fixes

Key	Summary
CRMC-60727 SF Case: 05400720	Offline PNR Sent to Reporting Queue Prior to Approval Fail to Advance to Ticketing.
CRMC-59219 SF Case: 05233036	Missing Date and Time in Travel Request.

Key	Summary
CRMC-58462 SF Case: 05142645	Missing locations in LIMO/TAXI segments.
CRMC-53648 SF Case: 04942135	Workflow Admin - Notification to Manager when skip step does not work.
CRMC-56893 SF Case: 05130994	Travel request submission error.
CRMC-58224 SF Case: 05207068	Default Request Approver cannot be removed through Profile tab.
CRMC-58848 SF Case: 05274292	List result preventing Request submission.
CRMC-55181 SF Case: 05027350	In Request, a multi-line edit field is not scrollable after submission when using IE8.
CRMC-59925 SF Case: 05314571 CRMC-60078 SF Case: 05346012	Airports missing in Request.
CRMC-56832 SF Case: 05140049	From/To fields occasionally randomly reinitialized.
CRMC-54751 SF Case: 04965983	Deleted list values are not retained on fully approved requests.

Key	Summary
CRMC-58389 SF Case: 05140916	Employee import is setting the incorrect preference for the user.
CRMC-56624 SF Case: 05085729	Tooltip not displaying.
CRMC-58465 SF Case: 05247127	Localized language issue for taxi.
CRMC-60093 SF Case: 05353532	Unable to select an agency proposal for a hotel segment.
CRMC-55495 SF Case: 05023830	(Delegate) Notify Approver - Email to Approver not sent.
CRMC-58296 SF Case: 05203994	System Error when Clicking Approval Flow.

Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
November 2014 Initial post: Friday, November 14, 10:30 AM PT	Concur - 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.

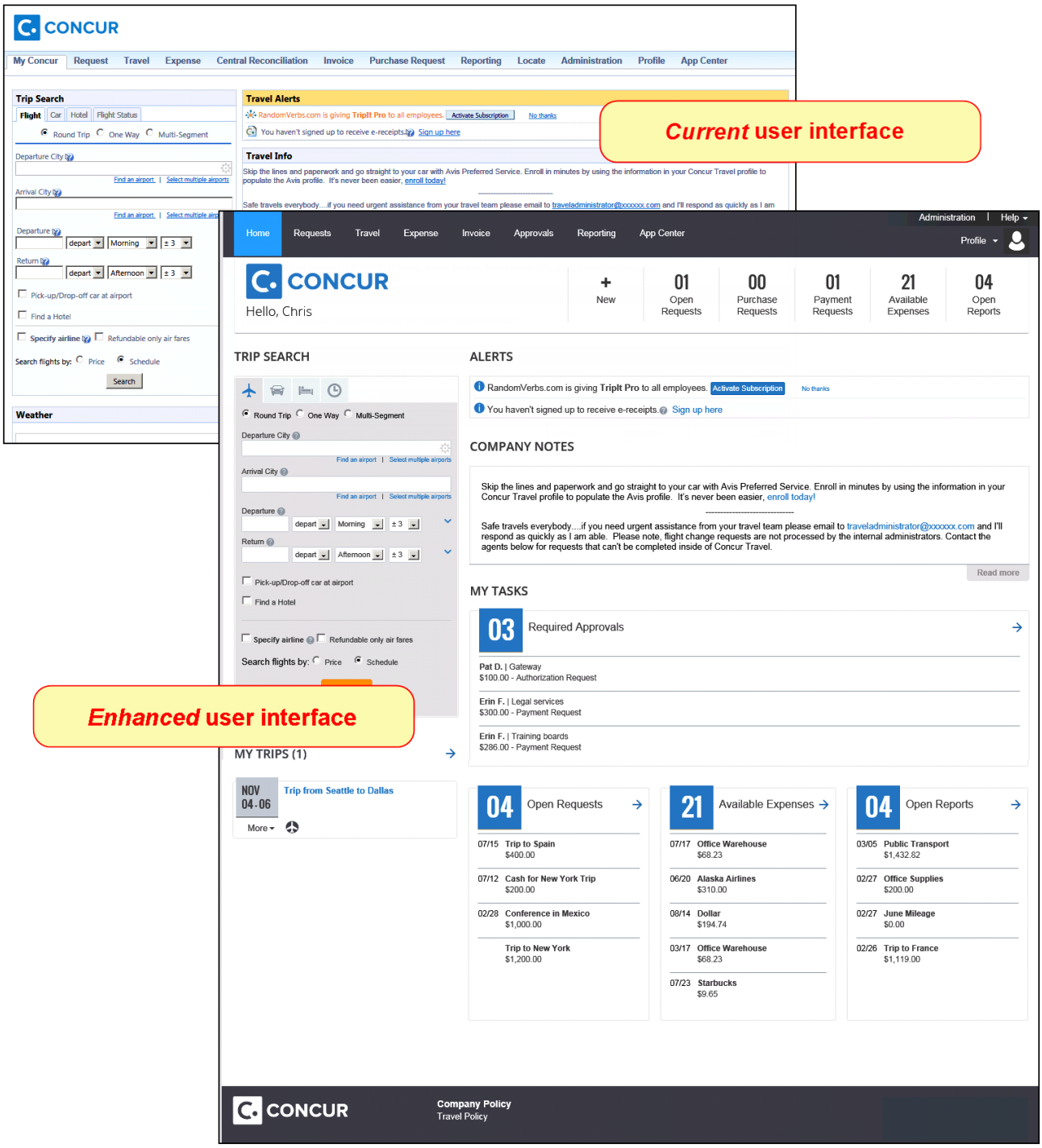
This Release

The new features are:

- Two User Interfaces – Enhanced UI
- Retrieve Offline PNR: Control on Request ID Validity
- Travel Integration: Warning on Itineraries with Undetermined Amounts
- Modified Audit Trail Message when Approved Request is Updated
- Configuration Report: New Travel Agency Information

Two User Interfaces – Enhanced UI

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



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

Quick Look

Take a quick look at the enhanced UI:
https://www.concur.com/en-us/introducing-concur-user-experience-updates

Getting Ready – Transition Guides

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

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

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

Access the guides here:
http://www.concurtraining.com/customers/tech_pubs/GW/_TransGuidesProf.htm

Release Notes – Sample Screens and Menu Navigation

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

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

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

Release Notes

Retrieve Offline PNR: Control on Request ID Validity

Overview

Concur has enhanced the offline PNR retrieval process to include new validation during the import process. Concur now verifies that the request ID manually specified in the PNR by the TMC matches the user and company. Any PNRs that do not match on either or both of the data points will be considered invalid and sent to the Offline Approval Error Queue, if configured.

NOTE: Error analysis is not provided when removing a PNR from the Offline Approval Queue. The TMC can access a list of potential errors via documentation.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature increases the accuracy of the imported PNRs, and provides feedback on failed PNRs.

Configuration / Feature Activation

The feature is automatically on for clients using Retrieve Offline PNR.

Clients should configure an Offline Approval Error Queue in Travel to capture the errors.

📖 For more information, refer to the *Concur Travel: Travel System Admin User Guide*.

Travel Integration: Warning on Itineraries with Undetermined Amounts

Overview

Concur has enhanced the Request and Travel integration process to load itineraries with empty amount values whenever it cannot be computed. Prior to this release, these itineraries were rejected and Request not updated, breaking the link between a trip and the related Request. In the November 2014 release, Concur has added a new audit rule to add an exception to the generated requests for these itineraries with the following message:

"At least one item on your itinerary is missing an amount or a currency. Please contact your Concur administrator."

This audit rule is on by default.

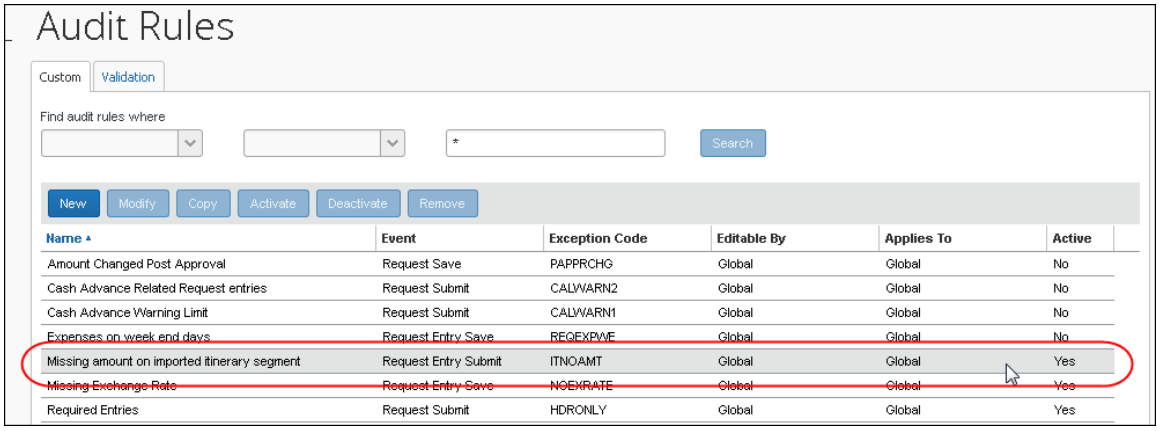
BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides more visibility around imported itineraries.

Configuration / Feature Activation

The feature is automatically on for Request clients integrated with Travel (including Retrieve Offline PNR feature); there are no additional configuration or activation steps.

The administrator can turn off the audit rule in the **Audit Rules** page of Request Admin if amounts are not mandatory.



Name	Event	Exception Code	Editable By	Applies To	Active
Amount Changed Post Approval	Request Save	PAPPRCHG	Global	Global	No
Cash Advance Related Request entries	Request Submit	CALWARN2	Global	Global	No
Cash Advance Warning Limit	Request Submit	CALWARN1	Global	Global	No
Expenses on week end days	Request Entry Save	REQEXPWE	Global	Global	No
Missing amount on imported itinerary segment	Request Entry Submit	ITNOAMT	Global	Global	Yes
Missing Exchange Rate	Request Entry Save	NOEXRATE	Global	Global	Yes
Required Entries	Request Submit	HDRONLY	Global	Global	Yes

Modified Audit Trail Message when Approved Request is Updated

Overview

After a request is approved, any updates to the itinerary (from agents or Travel) are not applied to the request. Instead, Request creates an audit trail entry to notify users that the request was not updated. In the November 2014 release, the audit trail messages were updated to clarify that the user does not need to take an action.

Former message:

Itinerary received on approved request - Update rejected

New message:

- When the amount did not change since last update received (*):

  Travel itinerary updated – since this request is already approved, the request has not been updated even though the itinerary has more current information. NO ACTION REQUIRED

- When the amount changed since last update received:

  Travel itinerary updated – since this request is already approved, the request has not been updated even though the itinerary has more current information. Effective amount of the Request is now zzz <amount+currency>. NO ACTION REQUIRED

NOTE: For older Requests, the audit trail now contains the label designated above by (*)

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement clarifies the activity in Request when an itinerary is updated, making it clear that it is not a failure notification.

Configuration / Feature Activation

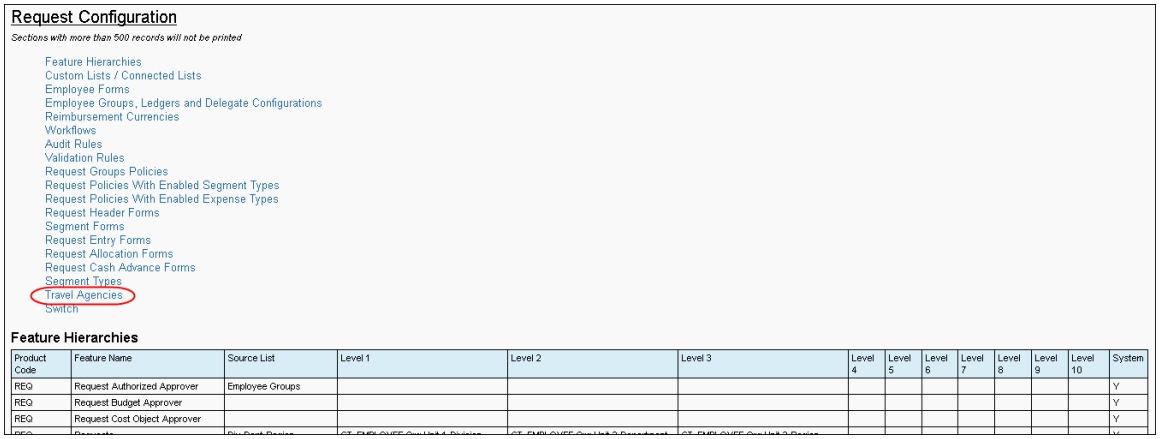
The feature is automatically on; there are no additional configuration or activation steps.

Configuration Report: New Travel Agency Information

Overview

Concur has updated the Configuration Report to include the following additional information about the configured travel agencies.

- Concur Agency Code
- Is Active
- Offline PNR Accepted in Request
- Agency Proposal Type



Request Configuration

Sections with more than 500 records will not be printed

Feature Hierarchies
Custom Lists / Connected Lists
Employee Forms
Employee Groups, Ledgers and Delegate Configurations
Reimbursement Currencies
Workflows
Audit Rules
Validation Rules
Request Groups Policies
Request Policies With Enabled Segment Types
Request Policies With Enabled Expense Types
Request Header Forms
Segment Forms
Request Entry Forms
Request Allocation Forms
Request Cash Advance Forms
Segment Types
Travel Agencies
Switch

Feature Hierarchies

Product Code	Feature Name	Source List	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8	Level 9	Level 10	System
REQ	Request Authorized Approver	Employee Groups											Y
REQ	Request Budget Approver												Y
REQ	Request Cost Object Approver												Y

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides additional information about travel agencies in an easy to view format.

Configuration / Feature Activation

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

Supported Configurations

Internet Explorer 7 – To Be Discontinued

Overview

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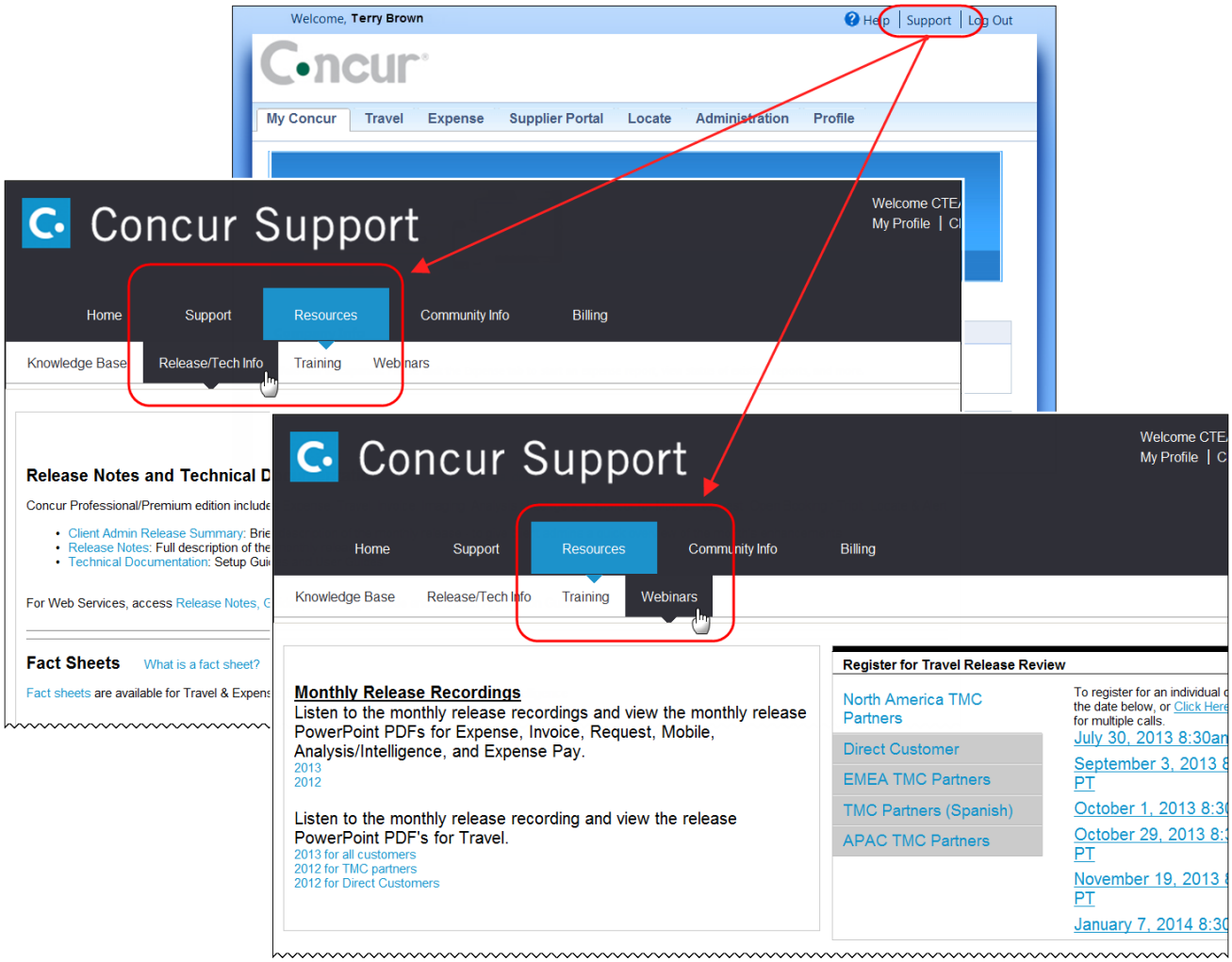

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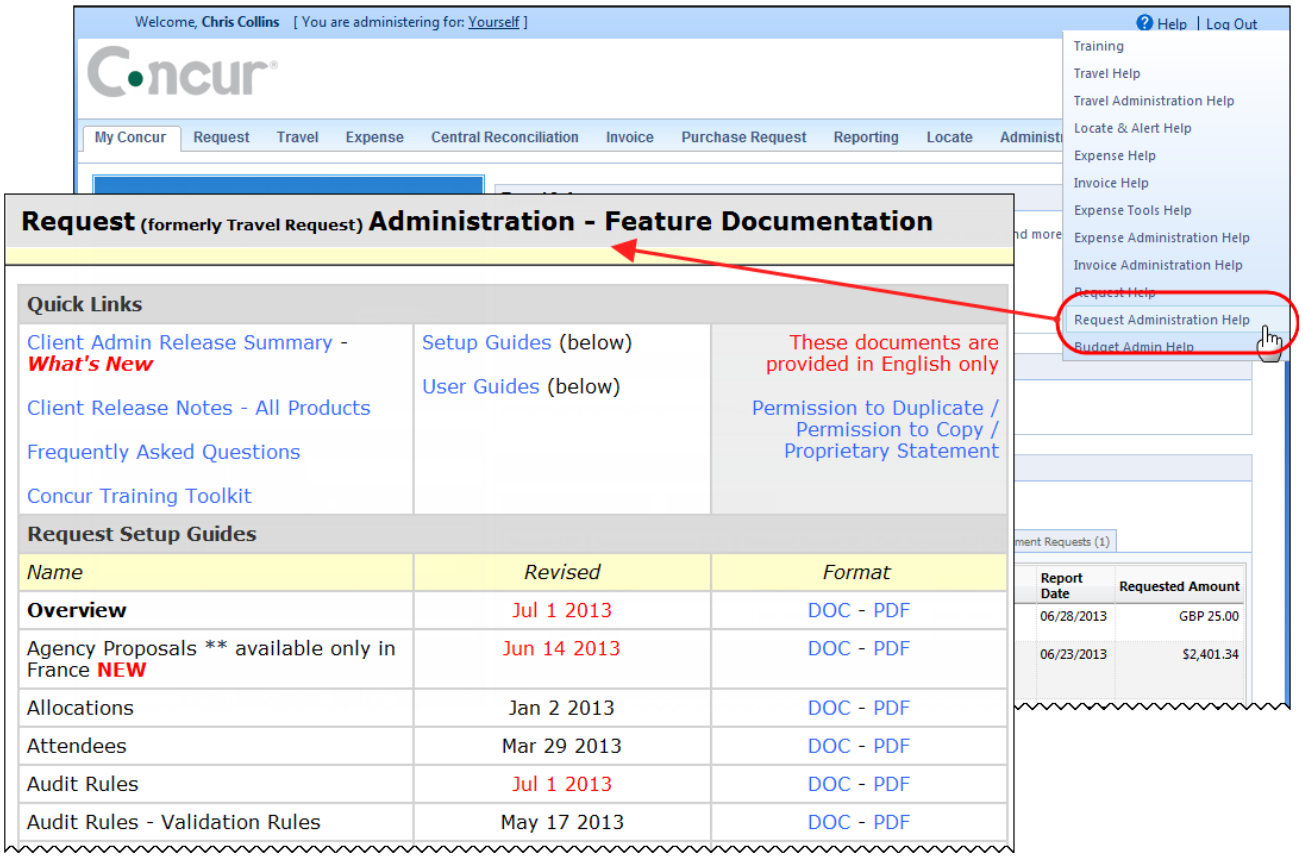

Concur Release Notes **Authorization Request (formerly Travel Request)**	
Month	**Audience**
December 2014 Initial post: Friday, December 12, 12:30 PM PT	Concur - Client FINAL

Contents

Summary

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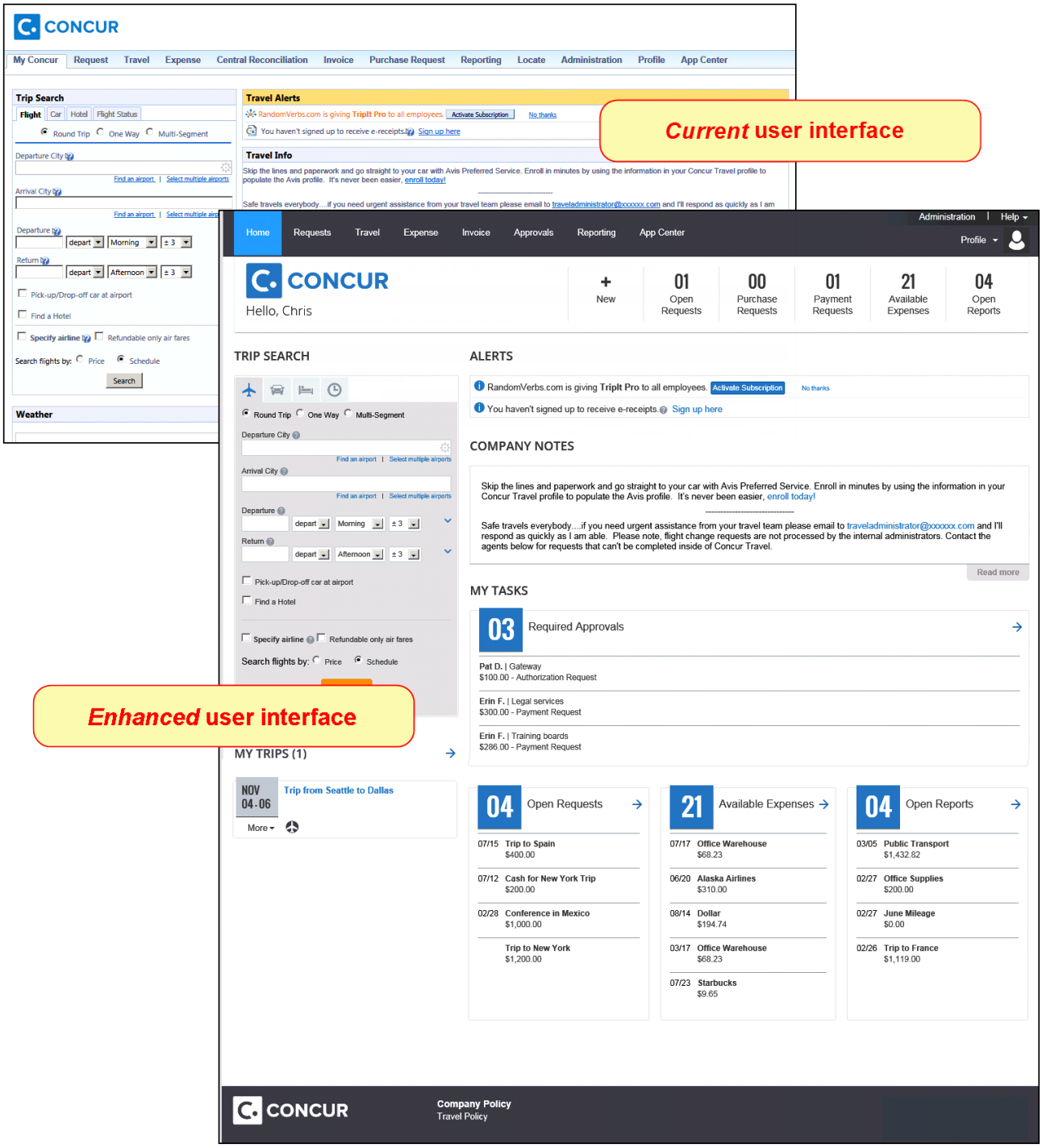
This Release

The new features are:

- Training Admin: New Training Materials (English and Latin American Spanish)
- Classic Integration Administrator Retirement

Two User Interfaces – Enhanced UI

Concur is in the process of transitioning from the current user interface to the enhanced user interface.



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

Release Notes

Request

Training Admin: New Training Materials (English and Latin American Spanish)

Overview

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration/Feature Activation

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

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

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

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

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

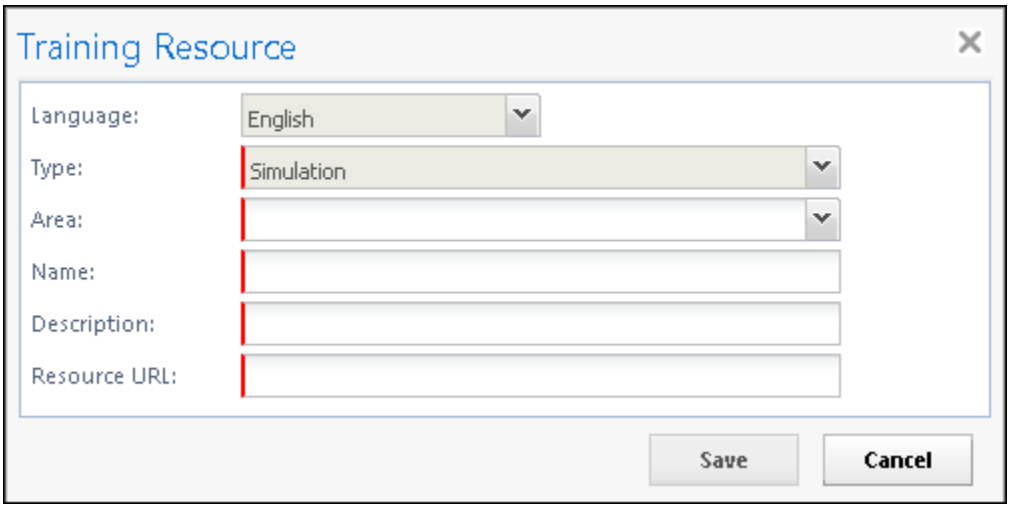
The following processes explain how to complete these actions.

- ***Deactivating the enhanced UI training:***

  1. Click **Administration** > **Request.**
  2. Click **Training Administration** (left menu). The **Training Configuration** page appears.
  3. On the **Simulation Resources** page, select **English** or **Latin American Spanish**.
  4. Clear (disable) the **Active** check box for the desired simulations.

- ***Adding a link to a previous training module:***

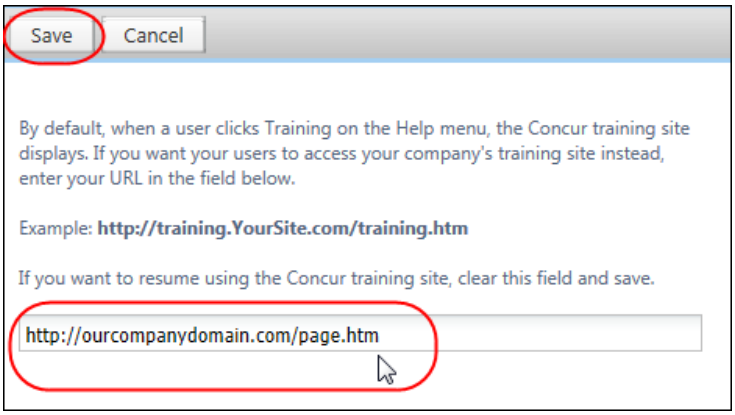
  1. Click **Administration** > **Request**.
  2. Click **Training Administration** (left menu). The **Training Configuration** page appears.
  3. On the **Simulation Resources** page, select **English** or **Latin American Spanish**.
  4. Click **New**.
  5. Enter the details of the training resource, including the URL.



  6. Click **Save**.

Directing users to a different training site:

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



5. Click **Save**.

Classic Integration Administrator Retirement

Overview

The Integration Administrator (Restricted) tool and most portions of the Integration Administrator tool in the classic user interface will be retired in the January 2015 release. The retirement will affect all sub-pages of Integration Administrator except the **Configure Extracts, Company Cards** and **System Log** sub-pages. All the functionality on the retired sub-pages has already been moved to Import/Extract Monitor and Import/Extract Administrator in the current/enhanced user interface. After the January release, the admins will only see the Configure Extracts, Company Cards and System Log sub-pages in the classic Integration Administrator.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement removes pages that have been transitioned to the current/enhanced user interface.

Configuration/Feature Activation

This feature is automatically on for all clients; no additional configuration or activation is required.

For more information, refer to the *Shared: Import/Extract Monitor User Guide* and *Shared: Import/Extract Administrator User Guide*.

Supported Configurations

Internet Explorer 7 – To Be Discontinued

Overview

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

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

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

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

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

What the User Sees

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

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

Configuration / Feature Activation

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

Monthly Browser Certifications

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

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

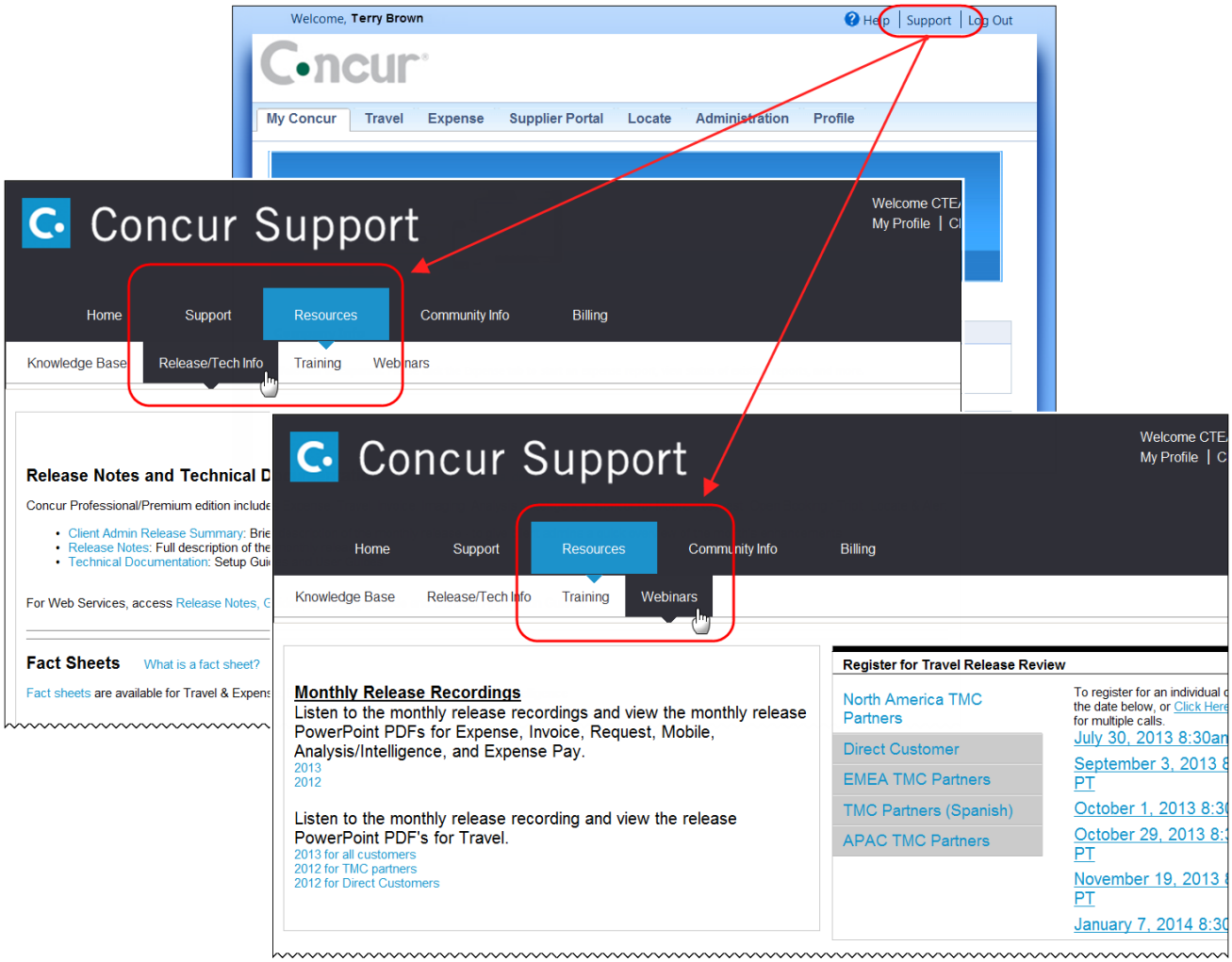
Additional Release Notes, Webinars, and Technical Documentation

Concur Support Portal

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

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

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



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

Online Help – Admins

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