2018 - Product Updates

Last Modified on 25/01/2023 1:38 pm GMT

December - (19/12/18)

Date: 19/12/18
Version: 2018.12.19.1

Bug Fixes

- Fixed an issue where users were able to add, edit and delete certain elements within the Tailoring menu, despite only having 'View' access enabled on their Access Role.

  The affected areas were:
  - Email Suffixes
  - Quick Entry Form Design (159708)

- Fixed an issue where users were able to add, edit and delete various elements within the Base Information menu, despite only having 'View' access enabled on their Access Role.

  The affected areas were:
  - Allowances
  - Expense Categories
  - Expense Items
  - Pool Vehicles
  - P11D Categories
  - Vehicle Journey Rate Categories (66985)

- Fixed an issue where users were unable to save report export options.(152084)

- Fixed an issue where users were able to add, edit and delete Filter Rules despite only having 'View' access enabled on their Access Role. (126114)

- Fixed an issue where automatic driver checks were not being performed after driving licence expiry despite the user providing consent. (157987)

- Fixed an issue where an authoriser's approval limit was not being reset after the claimant unsubmitted and resubmitted their claim. This issue caused claims to incorrectly be passed through to the next approval level. (152302)

- Fixed an issue where the Check & Pay menu option was displaying that a claim was awaiting approval, despite being in the Expedite Validation signoff stage. (159859)

- Fixed an issue where users were able to edit various elements within the Tailoring menu, despite only having 'View' access enabled on their Access Role. To enhance user experience, we have amended the functionality to enable both 'View' and 'Edit' access when either checkbox is selected on the Access Role.

The affected areas were:
  - Colours
  - Company Details
  - Company Logo
  - Default Print View
  - Default View
  - Print Out (66999)

- Fixed an issue that caused an error to display when clicking on the car icon from the Claim Details page. This occurred when the claimant had no home or work address configured but the expense claimed had a home to office deduction enabled. (147994)

- Fixed an issue which caused an error if a user attempted to submit the same claim twice using two separate browser tabs. In this scenario, when clicking 'submit' for the second time, the user should be directed back to the Claim Details page. (159801)

December - (06/12/18)

Date: 06/12/18
Version: 2018.6.12.1
Release Type: Out of schedule

Bug Fixes

- Fixed an issue that was causing ESR V1 imports to fail.(159606)

December - (05/12/18)

Date: 05/12/18
Version: 2018.12.5.1

Enhancements

- As an added security measure, a new email notification has been added to inform you if your Assure Expenses password has been changed. (156653)

- As an added security measure, a new email notification has been added to inform you if your bank details have been changed within Assure Expenses. (155697)

- We have enhanced the IP address filtering so that it now applies to the web version of Assure Expenses only. When IP address filtering is enabled, users will be able to access Expenses Mobile at any location but web usage will be restricted to the IP address location only. (155129)

Performance

- We've tweaked some things "under the hood" to improve the performance of the Add/Edit Expense page. (159504)

- We've improved the performance and load times of certain fields which return search results as you type. The fields that have been improved are:

    - The 'Line Manager' field on the Add/Edit Employee page.
    - The 'Claimant' field on the Claim Viewer page.(159494)

Bug Fixes

- Fixed an issue which caused an error on the Claim Details page when trying to modify the view. (159332)

- Fixed an issue where an error was displayed upon returning to the Claim Viewer page after changing the view on a user's claim. (159339)

- Fixed an issue caused by editing a setting on an existing Corporate Card Provider and then saving. (159368)

November - (23/11/18)

Date: 23/11/18
Version: 2018.11.23.3
Release Type: Out of schedule

Bug Fixes

- Fixed an issue where users were unable to download a copy of their Financial Export from the Export History Details page. When attempting to download the file the user was presented with the following error message, "An error has occurred processing this report". This issue only occurred for NHS ESR customers. (159284)

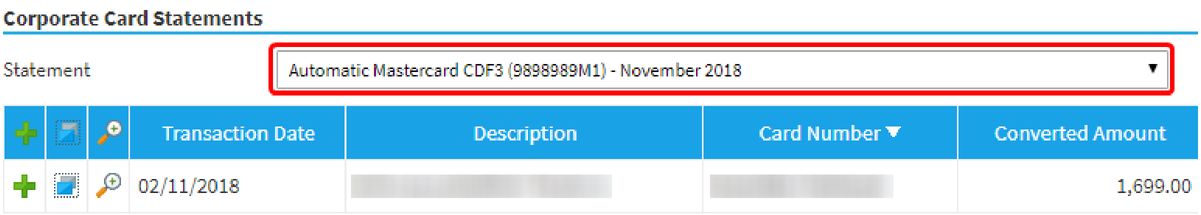
November - (21/11/18)

Date: 21/11/18
Version: 2018.11.20.1

Enhancements

- We have implemented a behind-the-scenes process to clear up deleted receipts from our secure storage. (157456)

- You now have the ability to combine your automatic card provider daily statement feed into a monthly feed. This new functionality will automatically group and sort daily statements into calendar months, reducing the number of statements and presenting them in an efficient and user-friendly format.



A new General Option has been added to enable monthly statements (Combine into monthly statements). For more information, view General Options - General Details. (154306)

> **Note:** When enabled, the following options will be unchecked and become inactive:
>
> - Do not allow items from different statements to be reconciled on the same claim
> - Do not allow claims to be submitted if there are outstanding corporate card items to be reconciled.

Bug Fixes

- Fixed an issue where the Selenity logo was being replaced within the page footer by the company logo which has been set. (158890)

- Fixed a small cosmetic issue which caused certain pages to display incorrectly. This affected the Claim Viewer and the Current/Submitted/Previous Claim pages. (158887)

November - (09/11/18)

Date: 09/11/18
Version: 2018.11.9.1
Release Type: Out of schedule

Bug Fixes

- Fixed an issue where certain employee details were not being imported correctly from ESR v2 outbound files. (158756)

- Fixed an issue where users were unable to view a PDF receipt from the Claim Details page when using Internet Explorer. When trying to view a PDF receipt, the user should be provided with a download link, whereas in this case, no information is displayed on the page. (158722)

November - (07/11/18)

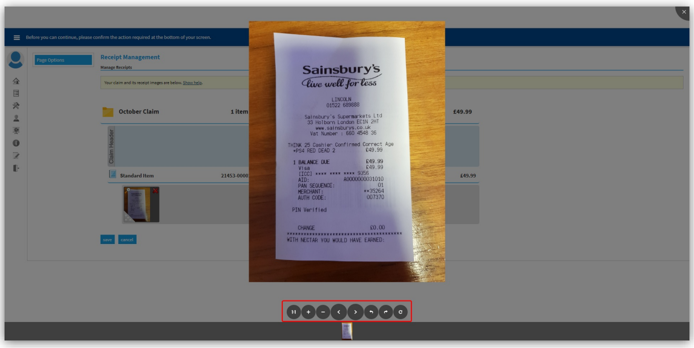
Date: 07/11/18
Version: 2018.11.7.1

Enhancements

- We have updated the receipt viewer which now offers new functionality and an improved user experience.

  The receipt image will now display in a lightbox view which provides you with a selection of buttons to manipulate the image (zoom, rotate, pan) and browse through any other attached images. Alongside this, when initially viewing the image, it will fit your screen size rather than displaying zoomed in.

  These changes apply when viewing images from the **Receipt Management**, **Claim Details** or **Claim Viewer** pages. (129724)



- Updated the **Save** and **Cancel** buttons on the Receipt Management page to adhere to our product standards. (129633)

- As part of our product rebrand, we have updated a number of assets within Expenses and on the API Documentation site including product logos and branding colours. (156688)

- We have tidied up and removed certain obsolete fields to prevent redundant information from being stored. As a result, some report fields will no longer be available and may cause custom reports to error if they contain any of the fields that have been removed. (157538)

Bug Fixes

- Fixed an issue which caused an error when attempting to view an ESR import log. This problem occurred on ESR v2 imports only. (157881)

- Fixed an issue which caused a delay when attempting to edit a GreenLight relationship attribute. (158021)

October - (24/10/18)

Date: 24/10/18
Version: 2018.10.23.1

Bug Fixes

- Fixed an issue where an error would occur when creating a default grouping configuration on a Torch GreenLight. (157812)

- Fixed an issue with the status which indicates whether an expense requires Expedite Validation, where the status was not being updated correctly after editing and changing the expense. This occurred when changing the expense from one which requires Expedite Validation to one that does not require validation and vice versa. (148188)

- Fixed an issue where the user was being returned to the previous page after pressing the enter key when filtering. (144910)

- Fixed an issue where a claim could bypass the authoriser level hierarchy and be sent to the default approver. This occurred when the approver returned to the previous page after initially approving the claim, then continued to approve the claim for the second time. (157436)

- Fixed an issue where claimants were able to allocate a mileage expense to an advance. Claimants should not be able to use an advance on mileage expense items. (47840)

- Fixed an issue on the Add/Edit Expense page where the exchange rate was not updating automatically after selecting a new expense date. This occurred when the exchange rate was set to 'Determined by a Date Range' and changing the date caused a new exchange rate to come into effect. (133958)

October - (12/10/18)

Release Type: Out of schedule
Date: 12/10/18
Version: 2018.10.12.2

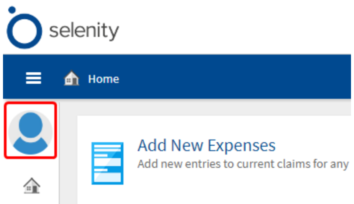
Enhancements

- Adjusted the 'Mobile' marketing menu option on the homepage for NHS users in accordance with the merging of our mobile apps. (157242)

- Removed the 'GreenLight' marketing menu option from the homepage as it is no longer required. (157241)

Bug Fixes

- Fixed an issue where the 'user' icon was not displayed while browsing with Internet Explorer. (157810)



- Fixed an issue where certain users were unable to view a receipt attached to an expense. This issue occurred on both Web and Mobile platforms. (157789)

- Fixed an issue where certain users were unable to upload and attach a receipt to an expense. This issue occurred on both Web and Mobile platforms. (157791)

- Fixed an issue in reports where no data was displayed on a calculated column if the 'Total Heavy Bulky Goods Miles' field was used. (156990)

- Fixed an issue where users were unable to save changes to an existing report. When attempting to save, the following error displayed: 'The report name you have entered already exists'. (157817)

October - (10/10/18)

Date: 10/10/18
Version: 2018.10.10.1

Enhancements

- We have made some behind the scenes improvements to the way that we store your receipt images, now encrypting each receipt for enhanced data security.

This process will happen automatically and there will be no noticeable change within Expenses. (156713)

Bug Fixes

- Fixed an issue on GreenLight forms where the first organisation listed was being incorrectly selected for ESR users with multiple assignment. (156642)

September - (18/09/18)

Release Type: Out of schedule
Date: 18/09/18
Version: 2018.9.18.1

Enhancements

- Expenses now allows you to configure multiple accounts for an automatic corporate card provider. Previously, you were only able to create a single account using the Automatic HSBC or Automatic Mastercard CDF3 corporate card provider.

  When adding a new automatic card provider account you will need the unique 'Card Provider Customer Identifier', so that Expenses can ensure that it is not a duplicate and can automatically retrieve the correct account statements from your provider. Contact your card provider to obtain your unique 'Card Provider Customer Identifier'.

  To further improve your user experience, we have added a new 'Card Provider Customer Identifier' column to the 'Corporate Card Providers' page so you will be able to differentiate between multiple accounts with a single provider. (155800)

  Corporate Cards - Feature Overview
  Add a Corporate Card Provider

- If your organisation utilises the Expenses API, you can now get all unsubmitted claims for every user within your system.

  The new "GET Current Claims for All Users" endpoint will retrieve ClaimID and EmployeeID details and will be restricted on the Access Role permissions of the user calling the API.

  - The user calling the endpoint will require an Access Role with permissions to 'Claim Viewer'.
  - The user calling the endpoint will require an Access Role with Reports Access set to 'All Data'. (155634)

Bug Fixes

- Fixed an issue where a user was able to claim mileage despite their vehicle having no current insurance record on the date of the expense. This occurred when 'Use date of expense for duty of care checks' was enabled and insurance was set as a required document type. (156572)

- Fixed an issue where users were unable to download a Torch merge document.(156362)

- Fixed an issue where an employee was able to progress through Self Registration without selecting a mandatory Access Role or Item Role. This caused an error when trying to complete the Self Registration process. As part of this fix, we have added validation so that the employee cannot proceed until they have selected the Access Role/Item Role. (155110)

- Fixed an issue which caused an error to display when using the API to modify exchange rates. (154270)

- Fixed an issue where certain types of VCF4 corporate card transactions were being imported incorrectly.

  The VCF4 statement file displays values as positive numbers with an indicator whether the value is debit or credit. Previously, all of these values were being imported as positive (debit). We have now made a change to the import to check whether the value is debit or credit and then adjust the value to a negative figure where required. This fix is being applied to both Automatic HSBC and Manual Barclaycard VCF4 providers. (155940)

September - (14/09/18)

Date: 14/09/18
Version: 2018.9.11.1

Enhancements

- As part of the improvements for GDPR, a new record will be added to the Audit Log when Import History data is read. (155303)

- A new email notification has been added which details outstanding claims awaiting approval by an approval team. This will only include claims which have not yet been allocated to an individual approver within the team.

  This email will be enabled automatically and the email content can be amended within the Email Templates menu. (153186)

Bug Fixes

- Fixed an issue that occurred when clicking the 'Save & Duplicate' button on a GreenLight Form. (156107)

- Fixed an issue where ESR Outbound imports were failing to sync in Expenses correctly. After importing assignment records, changes were failing to display when viewing an employee record. (156150)

- Fixed an issue where the number of available API calls per customer was being reset incorrectly. (155560)

- Fixed an issue where receipts became unreadable after conversion from PDF format to JPG. (147207)

August - (29/08/18)

Date: 29/08/18
Version: 2018.8.29.1

Enhancements

- As part of the improvements for GDPR, new records will be added to the Audit Log when information is read in the following areas of Expenses:
  - Reports (155291)
  - My Details (155309)
  - Support Tickets (155307)
  - Financial Exports (155299)
  - Employees (155308)

Bug Fixes

- Fixed an issue where an error message displayed upon login. This was related to Access Role configuration. (155424)

- Fixed an issue where a claimant could save an expense when their department breakdown did not equal 100%. (155413)

- Fixed an issue where an approver could not see a claimant in the Claim Viewer if the claimant had used a cost code where the approver was the cost code owner. This only occurred when the claimant's Signoff Group stage was set to 'Line Manager'. (155553)

- Fixed an issue where users were able to save an expense without completing mandatory fields (Department, Cost Code, Project Code). This issue occurred when these fields were set to display within the 'General Details' section of the Add Expense page. (154808)

- Fixed an issue where, in certain circumstances, a claimant could edit and save an expense with a costing breakdown of less than 100%. (147731)

- Fixed an issue where the vehicle registration number was not being displayed in the Duty of

Care message as expected. This only occurred if there was no MOT record present. (155369)

August - (13/08/18)

Release Type: Out of schedule
Date: 13/08/18
Version: 2018.8.13.1

Enhancements

- As part of the improvements for GDPR, a new record will be added to the Audit Log when the Audit Log is viewed. (155306)

Bug Fixes

- Fixed an issue where an email was not being sent to the delegate when the approver was on holiday and there were outstanding claims to approve. (154885)

- Fixed an issue with Access Role permissions causing an error relating to the Announcements feature. This affected a small number of users. (155295)

- Fixed an issue that affected a small number of users where a GreenLight could not be progressed through the defined workflow. (155368)

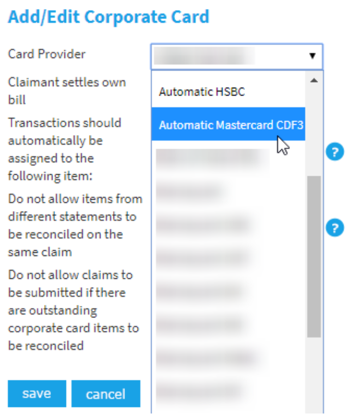
August - (11/08/18)

Date: 11/08/18
Version: 2018.8.9.1

New Features

- 'Automatic Mastercard CDF3' has now been added to the list of available corporate card providers, enabling Barclaycard statements to be processed automatically. (154018)

  Corporate Cards - Feature Overview
  Add a Corporate Card Provider



- The **Announcements** feature is a new in-product communication platform that will allow RLDatix to share product information within Expenses.

  Upon logging in, announcement messages will be displayed based on a user's Access Role permissions. These messages may describe new features within the product, upcoming updates or other important changes that affect your organisation.

  This feature will be solely controlled by RLDatix Administrators and cannot be customised by individual organisations. (149031)

Bug Fixes

- Previously stored item role information was displayed incorrectly when editing an item role on an expense item. (152542)

- There was no restriction on the 'Number of Allowances' field which meant that users could add a number which far exceeds what is permitted, causing an error when saving the expense. This field is now consistent with the product standards. (34184)

- Users were able to edit the percentage field on their Costing Breakdown despite Cost Code/Project Code/Department fields being read-only. (63438)

- An error occurred when attempting to approve a claim where the approver declaration contained a line break. (154715)

- Cost code owners were incorrectly provided with the option to approve a claim despite outstanding unapproved expense items which had been routed to a different cost code owner. This occurred when using Check and Pay on Expenses Mobile. If the cost code owner attempted to approve the whole claim they were presented with an error. (153982)

- Users have now been restricted from clicking 'Save' more than once on a GreenLight Form. This will help prevent duplicate information from being stored and workflow stages from being skipped. (123985)

- In the process of claiming mileage, Duty of Care checks were incorrectly being performed when the feature was disabled. This issue was caused by the migration of historical documents used in a previous version of the Duty of Care feature. (154734)

- Existing driving licence records were being duplicated on a daily basis for users with Driver Check enabled. The error occurred due to the driving licence lookup searching for the full 16 characters of the licence rather than the truncated version stored in the system. This only affected a small number of users. (154712)

- The 'Username' column was not displayed when viewing the history of a financial export.(154935)

- An error displayed when deleting a P11D category, Project Code or Reason due to a public API configuration issue. The error only occurred if the 'Reports Access' field on the Access Role was set to 'Data from the following access roles'. (154843)

- Fixed a spelling error in the 'vehicle model' validation message on the Self Registration menu. (154934)

- The number of available licenced API calls per customer was being reset manually each day. This process has now been automated. (152809)

July - (14/07/18)

Date: 14/07/18
Version: 2018.7.14.1

Removed

- Expenses360 will no longer be supported. For information on transitioning to Expenses Mobile, see Expenses Mobile User FAQs.

  As part of the Expenses360 shutdown, there have been several changes within Expenses. Each of these changes is detailed below:

  - Within General Options, the 'Mobile Devices' tab has been renamed to 'Expenses Mobile'.

- Within General Options, the 'Enable Mobile Devices' option has been renamed to 'Enable Expenses Mobile'. The tooltip has also been re-written to more accurately describe the option.

- Removed the 'My Mobile Devices' menu. This will restrict users from being able to register their mobile device to use with the old Expenses360 app.

- Removed the 'Mobile Devices' page option from within an employee record. This will restrict administrators from registering a mobile device for a claimant to use with the old Expenses360 app.

- Removed the 'My Mobile Items' section from the Claim Details page.

- Removed the 'My Mobile Journeys' section from the Claim Details page.

- Remove relevant API operations.

Bug Fixes

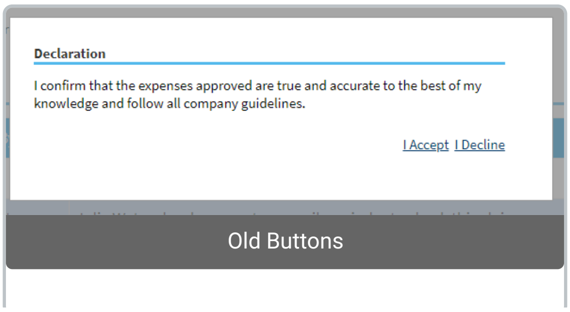
- An error occurred when adding a mileage expense if the vehicle MOT document included a null start date. A 'null' start date might have been present on documents that were added in the interim period between removing the 'Start Date' field and replacing it in a previous product update.

- When an approver amends a claimant's expense they are required to enter a reason for making the change and then click 'Save'. In this case, if the approver clicked 'Cancel', the changes that they had made were still saved, but the Claim History showed no record of the changes.

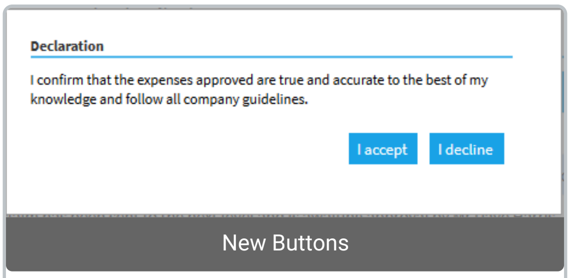
- Setting the 'Hotel Name' field as mandatory was not working as expected and allowed users to save a hotel expense without entering a hotel.

- In certain circumstances, vehicle tax documents were failing to automatically record when adding a vehicle with Vehicle Check enabled.

- The buttons on the approver declaration have been updated to match current product standards.



Old Buttons



New Buttons

- Users were unable to report on international bank details. IBAN and SWIFT Code fields have now been added.

- Any additional fields completed when adding an expense were being cleared if another expense was added on the same page.

- Enabling item roles within Self-Registration incorrectly caused access roles to display instead.

July - (04/07/18)

Release Type: Out of schedule
Date: 04/07/18
Version: 2018.7.4.1

Bug Fixes

- New assignment details were not being saved correctly on an employee record.

July - (03/07/18)

Release Type: Out of schedule
Date: 03/07/18
Version: 2018.7.3.1

Bug Fixes

- HSBC automatic card statements were failing to process correctly and therefore were unavailable for use.

- For Vehicle Check users, duplicate MOT documents were being recorded when an expense was added with a date prior to the MOT start date.

- When deleting a vehicle, any associated vehicle documents were failing to delete correctly.

- The full 16-character licence number was stored and displayed when adding a new Driving Licence using the Driver Check feature. This will now correctly store and display only the last 8 characters of the licence number.

- Misleading message when deleting a country that has been set as an employee's Primary Country. Previously the message stated: "The selected country cannot be deleted as it has been used on one or more expense claims". This has now been changed to accurately read: "The selected country cannot be deleted as it is currently set as the primary country for one or more employees".

- Appropriate messages were not being displayed when trying to archive a country which had been set as the Primary Country for an employee or if it had been used against an expense. This was misleading as the page looked as though the country had been archived, when in fact, it could not be archived due to the restrictions above.

- An error occurred when attempting to edit an existing GreenLight.

- Claims were not progressing past the Expedite Validation stage if the approver of the following stage was a team.

June - (13/06/18)

Release Type: Out of schedule
Date: 13/06/18
Version: 2018.6.13.1

Bug Fixes

- ESR GO 1 files were not being processed due to a configuration change.

- On the Add/Edit Expense page, the 'Reasons' field was only displaying reasons which have previously been amended since creation.

- An issue with Expenses360 meant that users were unable to sync expense items from the app to the Expenses website and also prevented new devices from being registered.

- The link that is included in approver reminder emails was not working correctly.

- Claims were not being progressed to the next signoff stage after the Expedite 'Validation' stage. The claims appeared as though they had progressed, displaying in the approver's Check & Pay menu, but the stage was still set as 'Validation'.

June - (07/06/18)

Date: 07/06/18
Version: 2018.6.7.1

New Features

- **Try our new Knowledge Base!**

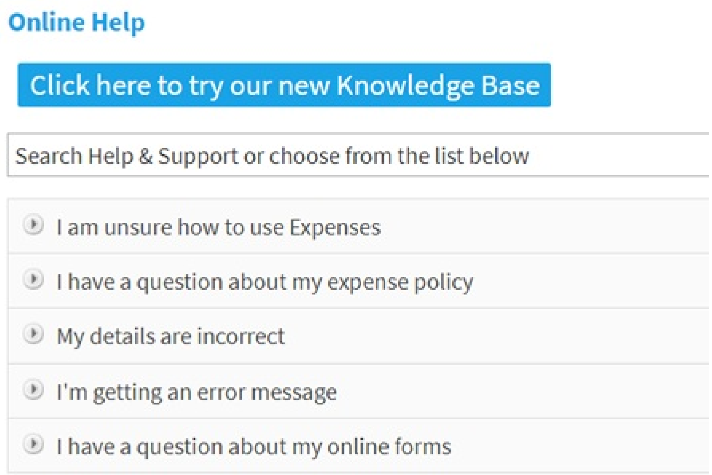
  We decided some time ago that Knowledge needed an overhaul. For multiple reasons, we decided that we would build this from scratch to take advantage of many new technologies and features in order to best suit customer needs. We are delighted to say that this is now available to try and we will be looking to fully roll out all of the exciting new features over the coming months.

  Some of the features you will be able to benefit from include:

  - Modern and intuitive user experience.
  - Easy to navigate using the new Table of Contents.
  - Relevant search results as you type.
  - Knowledge Articles/Release Notes/API Documentation available in one area.
  - Glossary of product terms.
  - Clearer images.
  - Download article PDFs.
  - Provide feedback and rate articles on their usefulness.
  - (Future Update) A widget which will allow you to search for help from within Expenses without the need to leave the product.

- You can access the new Knowledge using the following methods:

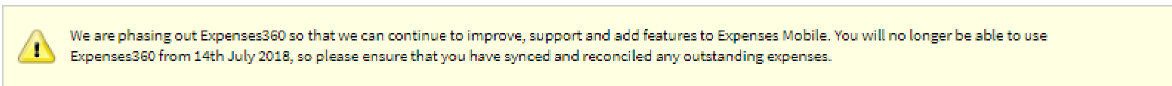
  1. Click the 'Try our new Knowledge Base' button from the Help & Support menu within Expenses. This will automatically direct you to the Homepage of Knowledge.



2. Go to http://expenses.knowledgeowl.com/help and use your Expenses credentials to log in.

Maintenance

- We will be phasing out Expenses360 so that we can continue to improve, support and add features to Expenses Mobile. To inform users of this upcoming change we have added a message above the 'My Mobile Items' section informing that any outstanding expenses created in Expenses360 will need syncing and reconciling before the shutdown date (**14/07/18**).



More information about the transition from Expenses360 to our current mobile app, Expenses Mobile, can be found here.

Bug Fixes

- Validation checks on invoice total will now be checked against the receipt total (in the currency that the purchase was made in) instead of the converted currency total.

- A selection of users were experiencing slow load times of expense items on the Add/Edit Expense page. This issue was particularly apparent for users with multiple items roles where a large number of expense items were present.

- ESR2 outbound files were amending the password method for an organisation which meant that users were unable to log into Expenses using their set password.

- Where Vehicle Check is enabled, claimants were unable to save a vehicle on the add/edit expense page, preventing them from claiming mileage.

The issue occurred if a vehicle was SORN or had insufficient MOT data, causing an error when attempting to save the vehicle.

May - (23/05/18)

Release Type: Out of schedule
Date: 23/05/18
Version: 2018.5.23.1

Bug Fixes

- For vehicle MOT documents that were added automatically using Vehicle Check, the expiry date being displayed was prior to the official expiry date. This issue was caused by a time/date configuration error.

  All MOT documents that were added automatically have been removed from the system and a new lookup will be performed to add a new MOT document when the vehicle is next used on a claim. GreenLight notification emails were failing to send to non-employee email addresses. This was caused by a recent product update.

- Vehicle lookups were failing when adding a vehicle on Expenses Mobile, preventing vehicle details from being automatically populated.

  The error occurred if Vehicle Check was not enabled on the system.

  Note: This feature was only available for iOS devices and therefore did not affect Android or Windows Phone.

May - (18/05/18)

Release Type: Out of schedule
Date: 18/05/18
Version: 2018.5.18.1

Enhancements

- Added the ability to exclude bank accounts from reportable data using the 'Reportable Fields' option within Access Roles.

Bug Fixes

- GreenLight notification emails were failing to send to non-employee email addresses. This was caused by a recent product update.

- An API configuration issue caused the following permissions error message to display when accessing the Expenses Mobile: "Your account does not have sufficient permissions, please contact your administrator".

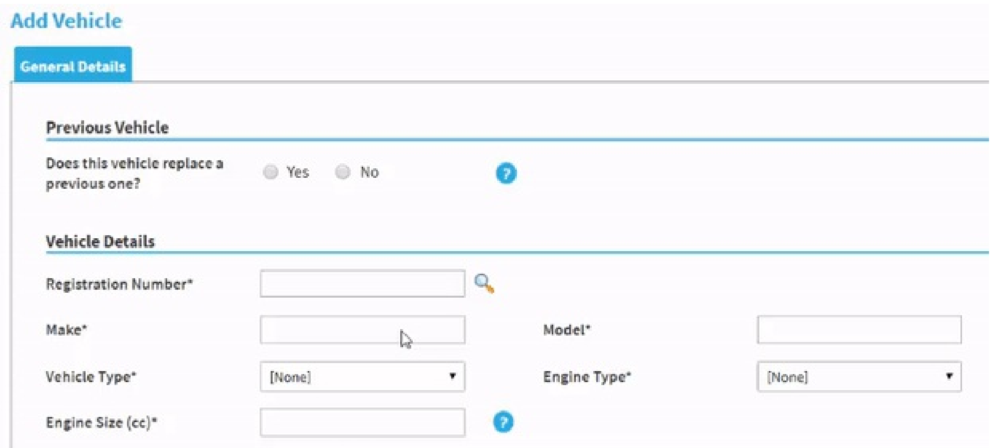
May - (12/05/18)

Date: 12/05/18
Version: 2018.5.11.1

New Features

- **Vehicle Lookup** - When adding a vehicle, users can now automatically populate the vehicle details by entering the registration number, making the process of adding vehicle details as effortless as possible. This will also be particularly useful if you manage vehicles on behalf of your claimants, saving time and providing accuracy.

  This service will be available as standard Expenses functionality and will incur no charge for using it. Enjoy!



- **Vehicle Check** - A brand new service for customers who have Duty of Care enabled which allows you to automatically populate a vehicle's MOT and Tax documentation, saving your claimants, approvers and administrators a significant amount of time and effort.

  A new general option has been added which will enable the automatic document lookup if Tax/MOT have been set as required documents.

Documents Required

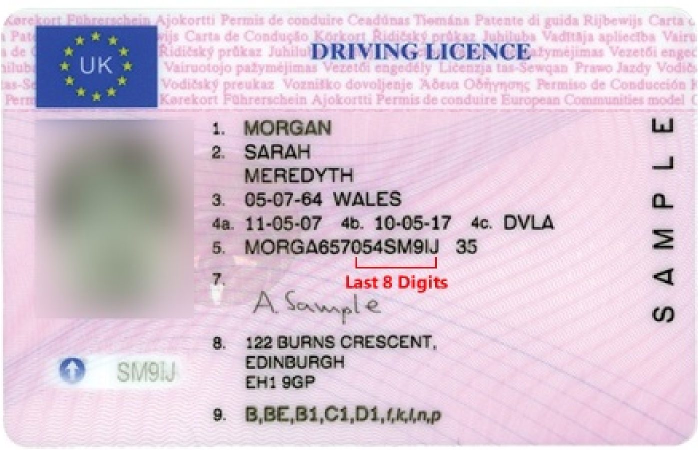
Driving licence	☐	Tax	☑
MOT	☑	Insurance	☐
Breakdown cover	☐	Enable automatic document lookup	☑

For more information, view the links below:

Vehicle Check
Duty of Care
General Options - Duty of Care

Enhancements

- When adding a driving licence, we now only require the last 8 characters of the licence number (excluding the issue number).



Note: Driver and Vehicle Check users will still be required to enter their full 16 digit licence number to provide consent for automatic lookups, but Expenses will only store and display the last 8 digits that we require.

- As part of the improvements for GDPR, new records will be added to the Audit Log when information is retrieved from the following areas of Expenses using the API:
  - Addresses
  - My Holidays
  - Advances
  - Check and Pay (Claim & Expense Items)
  - Claim Viewer (Claim & Expense Items)
  - Expense Item from a claim
  - Credit Card statements from a claim (as a delegate)
  - Credit Card statements

- You can now specify whether the data stored in a User Defined Field should be encrypted. This option is available for all text-based UDF types ('Text' and 'Large Text'). This allows you to add an extra layer of security to any personally identifiable data which may be entered.

Bug Fixes

- A configuration change prevented clients from using the API.
- Project codes were not updating correctly on the Add Expense page if added or updated using the Import Data Wizard.Project codes were not updating correctly on the Add Expense page if added or updated using the Import Data Wizard.
- An error occurred when attempting to delete a filter rule.
- Where a claim is split between multiple cost code owners for approval, the approver reminder notification was being sent to each cost code owner, even after approving the expense that they were responsible for. This will now only send to the cost code owners who have not approved the part of the claim that they are responsible for.
- An email error made driving licence information unretrievable for some employees that had provided consent for driving licence lookups.
- The Add/Edit Expense and Claim Details pages were loading slowly for customers who have configured filter rules on a large number of departments and project codes.
- An error occurred when attempting to add a new filter rule due to a cost code performance issue.
- Cost codes were not being filtered correctly for users with a default department where filter rules were present. The Add Expense page was displaying the full list of cost codes which was not being filtered by the default department as expected.

April - (23/04/18)

Release Type: Out of schedule
Date: 23/04/18
Version: 2018.4.23.1

Bug Fixes

- The Add/Edit Expense page was loading slowly for users who had a large number of cost codes/project codes/departments which were configured with filters.

April - (19/04/18)

Release Type: Out of schedule
Date: 19/04/18
Version: 2018.4.19.1

Enhancements

- New endpoints have been added to the Bank Accounts API. This allows your organisation to interact with any bank account for any of their user's within Expenses. The new endpoints which have been added include:

  - Get All Bank Accounts
  - Get Bank Account by ID
  - Post Bank Account
  - Edit Bank Account
  - Delete Bank Account
  - Archive/Unarchive Bank Account

  Full documentation can be found at https://webapi.sel-expenses.com/Help/Reference.

- MOT validation checks will now take into account the period between MOT expiry and the issue of a new certificate. If MOT is a Duty of Care requirement in your organisation, claimants will be unable to claim business mileage during this period.

Bug Fixes

- Expense items that had passed Expedite Validation were being incorrectly set back to 'Awaiting Validation' if another item on the claim was failed, returned and the receipt amended.

April - (16/04/18)

Release Type: Out of schedule
Date: 16/04/18
Version: 2018.4.16.2

Bug Fixes

- The 'Limit with a Receipt' and 'Limit without a Receipt' flags were not being applied to the correct limits set for an expense item within the item role.

April - (14/04/18)

Date: 14/04/18
Version: 2018.4.13.3

Enhancements

- When adding or editing a Greenlight Attribute, users can now specify whether the data stored for the attribute should be encrypted. This option is available for all text-based attribute types ('Text', 'Large Text' and 'Contact').

- A record will now be added to the Audit Log each time a receipt image is viewed by anyone other than the image owner. This applies to both web and Expenses Mobile.

- As part of the improvements for GDPR, new records will be added to the Audit Log when information is read in the following areas of Expenses:
    - Addresses
    - My Holidays
    - Advances
    - Check and Pay (Claim & Expense Items)
    - Claim Viewer (Claim & Expense Items)
    - Expense Item from a claim
    - Credit Card statements from a claim (as a delegate)
    - Credit Card statements
- The Item Roles page has been updated to conform to the page standards throughout Expenses.

- Expedite validation will no longer fail an expense if the expense has been reconciled to a corporate card transaction and the date of expense does not match that of the card statement.

- A Duty of Care option has been enhanced allowing reminder emails to be sent 7, 14 or 28 days prior to a claimant's driving licence review expiry.

Performance

- The performance of Cost Codes has been improved throughout Expenses. Load times will be improved in the following areas:

- Archiving/unarchiving a Cost Code
- Setting a Default Cost Code
- Cost Code changes on the Add Expense page.

Bug Fixes

- VAT on meal expense items was being calculated incorrectly when the 'Number of Others' was set at a value above 0. The VAT calculations were not taking into account the rules regarding which attendees VAT can be reclaimed for.
- When completing a GreenLight form, the validation messages were displaying the attribute name instead of the attribute label which had been set.
- Delegate sessions remained active when logging in on an additional browser tab. This applied when logging on via Single Sign-On.
- Scheduled Framework reminder emails were failing to send due to a configuration error.
- When modifying the exchange rate of an expense, validation failed and incorrectly allowed the expense to be saved.
- Email reminders for expiring Duty of Care documents were incorrectly being sent to archived employees.
- Users were able to submit their claim when there were outstanding corporate card items that had not been reconciled. When the 'Do not allow claims to be submitted if there are outstanding corporate card items to be reconciled' option is enabled, all corporate card items must be reconciled before being permitted to submit the claim.
- A Cost Code could be archived despite being set as an employee's default Cost Code.
- Delegate sessions remained active when logging in on an additional browser tab. This occurred when being redirected from the 'www' sub-domain to 'www1' on login.
- Users were unable to change password due to their old password not being recognised.
- Claimants were unable to save a reconciled corporate card item if the cost code field was displayed at claim level. An error message displayed when clicking Save, stating that the Cost Code was invalid.

March - (23/03/18)

Release Type: Out of schedule
Date: 23/03/18
Version: 2018.03.23.1

Bug Fixes

- Cost Codes which have been filtered by a Department were not being displayed in the Cost Code field on the Add Expense page.

- Where a GreenLight Attribute has a relationship to Cost Codes, only the first 25 cost codes in a list were being displayed on the GreenLight Form. All active cost codes should be available for selection.

March - (21/03/18)

Release Type: Out of schedule
Date: 21/03/18
Version: 2018.03.21.1

Enhancements

- Expedite Validate customers can now customise the percentage of expense items to validate per claim. The new option (Percentage of items to validate per claim) can be set per Signoff Group within the 'Validate' stage.

- We have introduced an easier way for you to search for a specific cost code when adding an expense. You will now be able to enter any character of the cost code and Expenses will automatically display relevant search results. As you continue to type, the search results will filter based on the text that you have entered.

Bug Fixes

- Driving licence checks were incorrectly restricting expense items for claimants with more than one driving licence. This occurred when the claimant had a valid driving licence as well as a licence which had been rejected.

- The 'Post' for Bank Details API produced a misleading validation message when an incorrect country code was used.

- Tooltips were not being displayed correctly for user defined fields within Self Registration.

- For NHS Trusts that have the same VPD on both version 1 and 2 interfaces, an error displayed when processing version 2 outbound files, causing the import to fail.

March - (10/03/18)

Date: 10/03/18
Version: 2018.03.10.1

Enhancements

- General Data Protection Regulation (GDPR) - Improved security measures have been added when an action is performed on a grid such as sorting, filtering or changing page.

- General Data Protection Regulation (GDPR) - All passwords will now be hashed to prevent decryption.

- General Data Protection Regulation (GDPR) - All metadata will now be removed from uploaded receipt images in .jpg format. This metadata includes details such as geolocation tags and device specifications.

- A record will now be added to the Audit Log each time a Greenlight attachment is viewed.

- The Signoff Groups page has undergone a visual overhaul which includes a new page layout, updated dialogs/grids and a general tidy up.

- The 'Do not allow unmatched items to be submitted' option has been relocated from the Add/Edit Corporate Card page to the General Details tab within General Options. This was moved as the feature did not function correctly with this option in its previous location.

- Certain pages have been updated to match the current page standards. This includes updated grids and modals to create a better user experience.

Bug Fixes

- An error occurred when filtering an n:1 Greenlight parent/child relationship.

- If configured correctly, Expenses will automate which mileage items can be allocated to specific fuel receipts, following the Sixth VAT Directive rules. The automation of this feature was not working as expected and therefore not allocating the mileage to the fuel receipts.

- Fixed an issue where there was no validation of Signoff Group name, allowing non-unique names to be saved.

- Users were unable to use their duty of care approved vehicle for claiming mileage if they had access to another vehicle without duty of care approval.

February - (10/02/18)

Date: 10/02/18
Version: 2018.02.10.1

Enhancements

- 'ESR Organisations' has been added as a new 'Related to' option when creating a Greenlight n:1 Relationship.

- Two new reporting fields have been added which allow you to calculate the SUM of the NET Total for items with VAT and items without VAT.

  The new fields are:
  - Sum of NET Total for Items With VAT
  - Sum of NET Total for Items With No VAT

  Both fields can be found under Claims | Claim Totals.

- Multiple parent filters can now be added to an n:1 relationship attribute when creating a Greenlight form.

- When creating a Greenlight form, multiple children can now be added to parent filters in an n:1 relationship attribute.

- Administrators can now delete Duty of Care documents that are no longer required.

Maintenance

- Certain pages have been updated to match the current page standards. This includes updated grids and modals to create a better user experience.

Bug Fixes

- When creating a P11D Category, certain auditable information was not being stored behind the scenes as expected. The fields which were not being stored were 'Created On', Created By', 'Modified On' and 'Modified By'.

- The method that is used to store certain page information caused an issue so that newly created UDF's were unavailable to report on.

- Unsubmitting a claim that contained a mileage expense caused the last odometer reading of an inactive vehicle to be deleted.
- Users were unable to report on User Defined Fields of type 'Relationship'.
- When attempting to add receipts to multiple expense items, the first receipt was being saved to all expense items and all other receipts were not saved. This problem occurred on Edge and Firefox browsers.
- The availability of the 'One Click Signoff' option was inconsistent depending on the other options which had been selected on the page. This fix ensures that the 'One Click Signoff' option is always disabled for the 'Cost Code Owner' and 'Assignment Supervisor' signoff person.
- The 'Signoff Person' was being displayed incorrectly after creating a Budget Holder Signoff Stage. After saving the stage, Cost Code Owner was being displayed.
- An error occurred when attempting to activate a self-registered user via the email link, when not logged into Expenses. After clicking the link, the admin will be directed to the login page before being able to activate the user.
- Fixed an issue where odometer readings for inactive vehicles were being used in mileage calculations on fuel receipt expense items.
- Vehicle journey rates were being incorrectly calculated based on the default financial year instead of the specified vehicle financial year. This only applied to organisations that specified a different financial year for vehicles.
- Users were unable to sum certain report fields which had previously been available.
- P11D Category was not being displayed on the 'Expense Item Details' page, despite being assigned to that specific expense item through the 'P11D Categories' menu.
- Fixed an issue where users were able to select the 'Home to Office is always zero' option and save the expense item without selecting a Home to Office Deduction option.
- An error occurred when attempting to use the 'Printer Friendly' option after running a report.
- Administrators were unable to create a 'Scan & Attach' Signoff Stage due to an error when attempting to save. This only occurred when configuring the stage with all three email notifications enabled.
- The distance between addresses was being populated incorrectly. This was caused by the way that Expenses searches for the data stored for each address.

- A new warning message has been added when attempting to delete a P11D Category which has been assigned to an expense item.

- Existing contracts could be amended by opening a new browser window in the same session and then creating a new contract. This issue caused the existing contract to be updated when the new contract was saved.

- An error occurred when attempting to import a card statement which contained a transaction with no country defined.

- The claim history was incorrectly being updated for all claims after a claim submission reminder was sent. This functionality should only update the current claims which have not yet been submitted.

- Text inconsistencies on the Signoff Groups menu in relation to the navigation breadcrumbs, page title and page options.

- Approver reminder emails were not being sent to cost code owners within a signoff group when a claim was waiting to be allocated for payment.

- Approver reminder emails were being incorrectly sent to all cost code owners within a signoff group regardless of whether they have approved the items that they are responsible for.

- The ability to define where a claim is routed if there is no Cost Code Owner was unavailable for certain customers. This option will now be available for all customers when configuring a Cost Code Owner Signoff Stage.

- Users were unable to save their mileage expense if it caused the 'Only allow journeys which start and end at home or office' flag to be applied.

January - (13/01/18)

Date: 13/01/18
Version: 2018.01.13.1

Enhancements

- We have made some small changes to the text displayed for Expedite validation results:

    - Claimants will no longer be informed that they should consider splitting an item if it has more than one VAT rate, as it is too late in the process to do so.
    - "Receipt item has a single VAT rate" will now be displayed as "Receipt item does not contain multiple VAT rates".

- After a driving licence is reviewed and approved, claimants will now be able to claim from the start date of their driving licence rather than the date of approval, allowing retrospective expenses to be claimed.

- Expedite validation will no longer display the results for VAT checks on expense items that are not applicable for VAT.

- Employees who have undergone compulsory workplace relocation can now be reimbursed a fixed amount for excess mileage. This change improves upon the original excess mileage implementation within Expenses, with the introduction of:

    - A new 'Fixed Excess Mileage' expense item type.
    - Item Role date ranges to enforce the 4 year maximum excess mileage period.
    - The ability to set a 'Fixed Excess Mileage' value against each employee.
    - Email notifications when a Home or Work Address is added, edited or deleted for a claimant with a 'Fixed Excess Mileage'

  The introduction of this feature will not affect organisations who have implemented excess mileage previously, where the excess mileage was based upon the distance between Previous and Current Work Addresses.

- 'ESR Positions' has been added as a new 'Related to' option when creating a Greenlight n:1 Relationship.

Bug Fixes

- An error displayed in the Check & Pay menu when attempting to filter claims by credit card.

- Multiple Expedite operators were able to validate a single receipt at the same time. This caused issues with the workflow of a claim if the receipt had failed validation.

- VAT was failing to calculate when adding a mileage expense if the 'VAT Percent Claimable' was set at a value less than 100%.

- Approver justifications were not displayed in the Claim Viewer when viewing flagged expense items as an approver.

- Claimants were unable to add a new expense after unsubmitting and modifying a returned claim.

- VAT was failing to calculate when adding a mileage expense if the 'VAT Percent Claimable' was set at a value less than 100%.

- If the first stage of a claimant's signoff group was set as 'Team', approvers within the selected team were unable to approve the claims using Expenses Mobile. Attempting to allocate the claim caused the app to crash.