

# 2023 - Product Updates

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## Release Notes - 07 December 2023

Date: 07/12/2023

Version: 2023.12.4.2

### Enhancements

- We've made an enhancement to the driver compliance pack in the Duty of Care module to update the driving licence lookup services to the latest version. (192876)
- We've added a new conditional option to the sign-off groups definition to allow a claim to be directed to another approver based on the reimbursable claim amount. (192906)
- We've changed the card provider Arbuthnot 678-2 to Renaissance so that it does not get confused with the card provider Arbuthnot 678. (193562)
- We've added a new option for the import of Barclaycard 1155 credit cards for reconciliation in the Expenses system. (193667)
- We've made an enhancement to allow the update of the driver details when you provide consent for the driving licence lookup. (193942)
- We've added a new option for the import of Arbuthnot Asset Alliance 678 credit cards for reconciliation in the Expenses system. (193947)

### Bug Fixes

- We've fixed an issue that prevented the emails for the Framework contract review from being sent. (193708)
- We've made improvements to our metrics and error logging. We added additional traces for ESR GO1 outbound service to help identify the problem if an error occurs during the transfer. (193759)
- We've made improvements to our metrics and error logging. We removed unnecessary spans for calls when saving API logs in the database through the ESR Go2 NHS Service. (193769)
- We've fixed an issue that appeared when you clicked the 'Please select a claim' option instead of selecting an actual claim, which redirected you to a Server Error page. (193792)

**Zendesk (for system administrators):** As a system administrator you can subscribe to Zendesk for more information. Please follow the link to Zendesk here:  
<https://www.allocate.support/hc/en-us/articles/11172352778140-Assure-Expenses-scheduled-release-2023-11-3-1-07-11-2023>.

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## Release Notes - 07 November 2023

Date: 07/11/2023

Version: 2023.11.3.1

### Bug Fixes

- We've made a small change in the Change View page UI for current claims to fix the error that appeared when you scroll and zoom through the listed fields section. (190875)

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## Release Notes - 05 October 2023

Date: 05/10/2023

Version: 2023.10.4.8

### Bug Fixes

- We've fixed a problem with the ESR Inbound payment file that prevented the file to transfer to the ESR hub. (193521)

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## Release Notes - 02 October 2023

*Date: 02/10/2023*

*Version: 2023.9.29.9*

### Enhancements

- We've added a new feature that allows you to set up flag management rules that integrate your Expenses system with Optima Health Roster. The new flag management rules allow you to flag to both claimants and approvers where the claim is for a date that does not match a roster activity.

To get access to the new feature, you must be an NHS customer, to have already implemented and be using Optima Health Roster, and to have the new feature enabled for your Expenses system.

You will not see any differences or changes to the way the system works if the feature is not enabled for your Expenses system. (188526, 188689, 189442, 189443, 189444, 189445)

### Bug Fixes

- We've fixed the error that appeared when you enter invalid postcode through the "Can't find what you're looking for?" field. (193004)
- We've made a change to our background static content to improve the way the time field works in the GreenLight technology. (193467)

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<https://www.allocate.support/hc/en-us/articles/10661427418908-Assure-Expenses-Out-of-schedule-release-2023-9-29-9-02-10-2023->.

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## Release Notes - 25 September 2023

*Date: 25/09/2023*

*Version: 2023.9.19.4*

### Bug Fixes

- We've fixed the way adding a description for new attachment types in the administrative settings is handled. Previously, when you add a description of over 500 characters, the description was shortened upon saving. Now, a message displays if the description is over 500 characters. (21392)
- We've fixed an error that appeared when amending or deleting a project code that did not have a description where a project code description was not defined in the system as a mandatory field. (192610)
- We've fixed an error that appeared in DataDog when the Framework app was used. The error appeared because the app was trying to log in to the public API. (193039)
- We've fixed an issue that was related to using a new line in the description box. The issue occurred when you uploaded an attachment in an email template and added a description. (193293)

## Enhancements

- We've added a new option for the import of HSBC credit cards for reconciliation in the Expenses system. (190069)
- We've updated our Open Telemetry library for the Duty of Care Reminder Service to allow tracing, which will give increased observability. (190788)
- We've added logging and tracing to our ESR interface services to allow increased observability. (191953)
- We've added a new option for the import of Arbutnot credit cards for reconciliation in the Expenses system. (193075)
- We've added a new option for the import of RBS credit cards for reconciliation in the Expenses system. (193094)
- We've added a new option for the import of Nat West credit cards for reconciliation in the Expenses system. (193095)
- We've updated the SSL Certificates for the Expenses product. (193407)

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## Release Notes - 21 August 2023

*Date:* 21/08/2023

*Version:* 2023.8.17.3

## Bug Fixes

- We've fixed an issue with the NHS ESR GO2 Outbound Interface where the import sequence number was not updated when the file contained an employee record with a missing email address. (193042)

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## Release Notes - 07 August 2023

*Date: 07/08/2023*

*Version: 2023.8.3.3*

## Bug Fixes

- We've fixed the Data Loader to include details of any rows that fail to import due to the item role start date or end date being in an invalid format. Data Loader supports the following date formats: "dd/MM/yyyy HH:mm:ss"; "dd-MM-yyyy HH:mm:ss"; "dd/MM/yyyy HH:mm"; "dd-MM-yyyy HH:mm"; "dd/MM/yyyy"; "dd-MM-yyyy". (191235)
- We've fixed the issue related to using the API lookup provider for accounts with maps disabled. Now, this is updated to the latest lookup version. (191707)
- We've fixed a performance issue where the system was running slowly when synchronising employee records. (192619)

## Enhancements

- We've implemented Multi-Factor Authentication (MFA) as a multi-step account login process that requires you to enter additional information apart from the password. Your customer account needs to be enabled before you can use this new option. (189919)
- We've updated the Duty of Care Reminder Service with tracing to provide better observability. (191953)
- We've implemented Open ID Connect to allow the implementation of Single Sign-On (SSO) and Multi-Factor Authentication (MFA) for the web to ensure you can use your corporate account for authentication. (190529)
- We've implemented a new SSO functionality. Users of the API with customer accounts that are enabled for this new option will receive additional changes. In My Details, users with access role permissions for use of the API need to generate a 'Personal Access Token' that can be

used for API calls. (190685)

- We've updated our Open Telemetry library for the Duty of Care Reminder Service to allow tracing, which provides increased observability. (190788)
- We've added Single Sign-On (SSO) implementation for the web to ensure you can use your corporate account, reduce the complexity of signing in, and increase security. You can also verify your corporate account if it has Multi-Factor Authentication (MFA) enabled. Your customer account needs to be enabled before you can use this new option. (191225)
- We've added the employee e-mail address as an additional column in the Employee Summary Grid. It is visible when you search for an employee record in the administrative settings. You can sort the new column and also use it as a search option. (191629)
- We've added the employee email address as an additional search option on the Employees page. Now, you can use it when searching for an employee record in the administrative settings. We've also added the email address as a search option when selecting a claimant in the Claim Viewer. (191662)
- We've made some background changes to our technology to optimise the database connections and the maximum pool size for the services. (191909)
- We've implemented Multi-Factor Authentication (MFA) for Expenses as a multi-step account login process that will require you to enter additional information apart from the password. Your Expenses system will need to be enabled before you can use this new option. (191889)

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## Release Notes - 25 July 2023

*Date: 25/07/2023*

*Version: 2023.7.24.1*

### Bug Fixes

- We've fixed a performance issue where the system was running slowly when synchronising employee records from the NHS ESR import. (192619)
- We've fixed a performance issue related to the "Count Unallocated Claims" script. The error is no longer reproducible. (192631)

### Enhancements

- We've removed an unnecessary API endpoint related to the API call status to reduce the

- number of calls made in the system and improve the performance of the API requests. (184658)
- We've removed unnecessary login attempts to the previously used customer portal "Circle" to improve system performance. (190041)
  - We've made a performance improvement to reduce the number of redundant calls to Expedite validate results. (192638)
  - We've made a performance improvement to reduce the number of calls to OCR to retrieve receipt details. (192639)
  - We've improved the exception handling of receipt 404 status reports that were handled as a 500 exception, which caused unnecessary traffic. This helps to improve the performance of the receipt wallet. (192640)
  - We've upgraded "Stack.Exchange" to the latest version to reduce the number of errors and improve the performance. (192642)
  - We've removed unnecessary bank account calls when retrieving an employee record to improve the performance. Previously, the system was making the call to retrieve accounts for all employees regardless of whether the employee had a bank account set up. (192661)
  - We've made an improvement to the mobile address journey builder. Previously, you had to enter two or more characters to get matching results. Now, suggested addresses are displayed in the search after you enter the first character. (192662)
  - We've set the database connection strings to the optimal value to optimise the system and improve the performance. (192648)
  - We've made an improvement to the authentication process to ensure that users are not affected by the SSO methods. Now, the system first checks if you used the traditional login method with a username and password, and then checks the SSO authentication methods. (192815)

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## Release Notes - 04 July 2023

*Date:* 04/07/2023

*Version:* 2023.7.4.4

### Bug Fixes

- We've reverted our recent updates made since the 29th June to overcome a performance issue in Expenses.

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## Release Notes - 18 May 2023

Date: 18/05/2023

Version: 2023.5.16.4

### Bug Fixes

- We've updated our observability logging to record for "Info" rather than "Error" where the Duty of Care licence reminder service finds no claimants whose Driving Licence documents have expired. Previously, this occurred multiple times and was incorrectly recorded as an error.

(190923)

### Enhancements

- We've improved the performance of the routine that gets the count of the unallocated claims in "Check and Pay" expenses. (189924)
- We've improved the performance of the routine that calculates the claims to be approved. (189926)
- We've made an enhancement to the odometer readings page for claim submission to enhance the flow for a better user experience. We've also provided guidance for when there is no business mileage being claimed as in this case, a new odometer reading is not always required. This allows more accurate personal mileage deductions to be calculated where this is configured in the system. (190531)
- According to enhancement number 190967 in the previous release, we've updated all fixed deduction expense items within submitted claims so that the calculation for the mileage threshold can be made with the new changes. (191033)

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## Release Notes - 20 April 2023

Date: 20/04/2023

Version: 2023.4.19.2



## Enhancements

- We've made an enhancement to allow the fixed mileage deductions added to the claim on claim submission to be included in the mileage threshold. This means that when you add new mileage expenses, the calculation is based on the effective miles and it does not include the miles that were previously deducted. (190967)
- We've updated the API suite to reflect our new branding and colour scheme (189873)

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## Release Notes - 30 March 2023

*Date: 30/03/2023*

*Version: 2023.3.29.4*

### Bug Fixes

- We've significantly enhanced the performance of the Fuel Receipt to Mileage Allocations calculations to prevent timeout issues. These issues occurred when making calculations in systems where a very large number of mileage items were saved and included in the calculations. We've also restricted the fuel receipts to those dated within the last 18 months. (188176)
- We've fixed an issue in the mobile app where a mileage item claimed as a pence per mile item but with only a total number of miles and no journey steps, would not always display correctly on the current claim. (191222)

### Enhancements

- We've redesigned the Fuel Receipt to Mileage Allocations calculations. This will improve the performance when making the calculations where a very large number of mileage items are saved and included in the calculations. Now, the procedure that used to take 1.5 hours or even time out, runs in a few minutes. (188873)
- We've updated the Assure Expenses default colour scheme to our new RLDatix colours. If you use the default system colours you'll see the colour changes, but you'll still be getting the same Assure Expenses experience and functionality! If you have configured Assure Expenses with a custom colour scheme, only elements such as buttons and icons will be updated to reflect the new default colour, whilst your custom colours will remain as they are. (189847)
- We've updated the default colour scheme for the buttons and icons in Expenses in line with

our new product branding. (189860)

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## Release Notes - 09 March 2023

*Date: 09/03/2023*

*Version: 2023.3.6.1*

### Bug Fixes

- We've restricted the code breakdown to up to 10 split codes to prevent an error from occurring. This change applies when you add an expense or when you set the default employee code breakdown. Previously, if you attempted to add more than 10 split codes, only the first 10 were saved. (173079)
- We've made an update in all areas where the line manager can be chosen. Now, the list of available employees excludes archived records. (190408)
- We've amended the calculation of the cumulative mileage threshold when adding mileage along with a fixed daily deduction that is later added to the claim on claim submission. Now, the calculation of the cumulative mileage only includes mileage expenses for the current financial year. If you claim a mileage expense retrospectively but for a date in the previous financial year, it will not be included in the total. (190589)

### Enhancements

- We've improved the performance of the address lookup by reducing the number of searches made to retrieve the address details. Previously, the address lookup was multiplied by the number of address labels, but now, a single lookup is performed regardless of the number of global or personal labels in the system. (190404)
- We've improved the performance of Expenses when accessing a current claim where there are many credit card items to be reconciled. Previously, the ongoing claim took a long time to display and a long time to reconcile the card items. (190528)

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## Release Notes - 23 February 2023

*Date: 23/02/2023*

*Version: 2023.2.21.4*

### Bug Fixes

- We've updated the buttons on the approver declaration so that the style matches other areas of Expenses where buttons are used. (159896)
- We've updated the mobile app to ensure the details display correctly when you dispute an expense item that has been returned during the validation service. (189875)
- We've fixed a problem with the automatic daily exchange rates where an error occurred when the database was configured either with a very large number of currencies or all possible currencies. Now, all exchange rates are imported successfully regardless of the number of currencies. (190749)

### Enhancements

- We've updated the "Duty of Care Reminder Service" with logging and tracing to increase observability. (190325)

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## Release Notes - 10 February 2023

*Date: 10/02/2023*

*Version: 2023.2.10.1*

### Bug Fixes

- We've updated Expenses to overcome an issue where the ESR GO2 outbound file would not fully complete import into Expenses where employees entitled to excess mileage had changed locations. (190571)

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## Release Notes - 06 February 2023

*Date: 06/02/2023*

*Version Number: 2023.2.3.2*

### Bug Fixes

- We've disabled the "autocomplete" attribute on some sensitive fields in Expenses, such as the password field on the login page, and the password fields on the My Details page. Now, the browsers may not cache the credentials locally, and the security is improved. (187341)
- We've made a change to the annual mileage totals to ensure that the cumulative mileage is updated for all expense items that are of mileage type. (189843)
- We've added a new vehicle type of "van", so that this can be selected when adding a new vehicle, or when the vehicle details are looked up with DVLA, and DVLA have the vehicle type recorded as "van" rather than "car". (189427)
- We've fixed an issue in the mobile app where the address lookup functionality caused an error to occur if the user entered an address search query containing no alphanumeric characters, for example "...". Where alphanumeric characters were used to find an address, no error was encountered. (189923)

### Enhancements

- We've updated the Duty of Care Reminder Service with tracing to allow increased observability. (189560)
- We've updated the Knowledge Owl Help and support documentation to reflect our new default colour scheme and our new product name of "Assure Expenses". (183852)
- We've renamed our "Selenity Expenses" product as "Assure Expenses" and as part of this process we've replaced all the corporate and product logos with our new name and icon. (189451), (189452)
- We've added a new option for the import of HSBC credit cards for reconciliation in the Expenses system. (189922)

- Our company name is changed to "RLDatix" and as part of this process we've replaced all the references to our company name which may have previously shown in Expenses as "Selenity" or "Allocate Software" to "RLDatix". (189850)
- Due to the rebranding of the Expenses system, we've updated 3 of the email templates to indicate that the email is from "The Expenses Team" rather than from "The Selenity Expenses Team". We have not made any updates where the email template has been customised by the system administrator. (190373)

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