

CONCUR ENHANCEMENTS

Alex Sims 11/17/2023



TOPICS

- Non-Travel Business Purpose
- Grant Justification
- Trend Analysis & Monitoring



NON-TRAVEL BUSINESS PURPOSE

Report Header
Non-Travel Testing | \$3,000.00

Addition by subtraction

Type of Report *	Report Name *	Report Start Date *
<input type="text" value="*Non-Travel Expenses"/>	<input type="text" value="Non-Travel Testing"/>	<input type="text" value="01/12/2022"/>
Detailed Purpose *	Index * ?	Activity Code ?
<input type="text" value="Buying stuff to use for things."/>	<input type="text" value="(AAR084) AAR - ApEcon Works"/>	<input type="text"/>
	Approval Status	Report Id
	<input type="text" value="Not Submitted"/>	<input type="text" value="1481B3C1FE2F41BCA1"/>
Comment		
<input type="text"/>		

NON-TRAVEL BUSINESS PURPOSE

 Allocate

Expense Line Item

* Required field

Expense Type *

Animal Care Supplies (21049)



Transaction Date *

11/16/2023



Vendor Name *

Bob's Burgers

Business Purpose

Expense for athletic events or competitions



None Selected

Expense for athletic events or competitions

Expense for use in a classroom or academic setting

Expense to further alumni and donor relations

Expense to further community outreach & engagement

City of Purchase



Currency *

US, Dollar (USD)




GRANT JUSTIFICATION

Enhanced justification requirements for higher risk Expense Types.

- Grant Index + High Risk Expense Type.
- High Risk = higher likelihood for granting agency to disallow a cost.

New System Audit Rule

 This expense line item requires justification when charged to a grant. Please provide a comment on how it directly benefits the project being charged.

TREND ANALYSIS & MONITORING

Increased Trend Analysis Window

Description of Exception

The employee has a series of transactions that are suspicious or violate company policy.

Employee	Employee Id	MCC Code	Num Transactions	Reporting Amount	Top Merchant
		5942	74	USD 12,197.84	AMZN MKTP USFXBRV

Indicators

- ▲ The pattern of purchases totaling **USD 12,197.84** exceed the risk threshold
- ▲ There are **74** transactions in the pattern for this MCC
- ▲ The transactions are in a low risk merchant category: **5942-BOOK STORES**
- ▲ Some transactions were made on a weekend or holiday
- ▲ Some transactions are round amounts
- ▲ The purchases were made between Jan 10, 2023 and Mar 06, 2023
- ▲ Employee ID has 5 other Closed Issue(s) identified in the past 180 day(s).
- ▲ Employee ID has a similar open exception.

DEMO