

Concur Release Notes	
Expense Professional / Premium	
Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: January 13 2018 Initial Post: Friday, January 12, 1:00 PM PT	Client FINAL

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Release Notes

Admin

Clone Test User

Overview

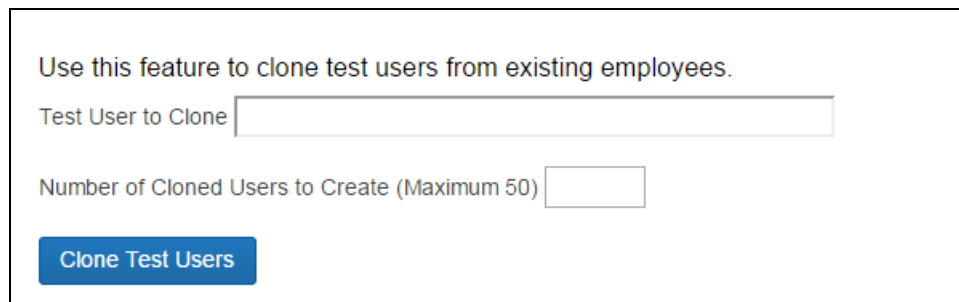
Clients are now able to automate the process of creating test users to test new functionality quicker and more efficiently. To do this, the client can clone an already existing user and thereby create the desired number of test users (up to 50 at a time, 999 in total) to test workflow and new features.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement enables clients to create test users quickly and efficiently, which reduces the time from testing to go live.

What the Administrator Sees

The administrator will see a new section, **Clone Test Users**, on the **Test User Admin** page in Administration.

A screenshot of a web interface for cloning test users. It features a light gray background with a white border. At the top, there is a blue header bar with the text "Use this feature to clone test users from existing employees." in white. Below the header, there is a form with two input fields. The first field is labeled "Test User to Clone" and has a light gray border. The second field is labeled "Number of Cloned Users to Create (Maximum 50)" and also has a light gray border. Below the second field, there is a blue button with the text "Clone Test Users" in white.

The administrator may delete test users via employee upload or via an import job.

Configuration/Feature Activation

The administrator will be able to clone test users on the **Test User Admin** page in Administration.

► To clone test users

1. Click **Administration > Expense > Expense Admin**.
2. Click **Test User Admin** (left menu). The **Test User Admin** page appears.

Test User Admin

Test User Setting

Use this feature to allow creation of test users. Test data will be prevented from being included in extract or analytics.

☒ Allow creation and use of test users.

[Save](#) [Cancel](#)

Purge Test User Transactions

Click the button below to remove all test transactional data. No production data will be affected.

[Purge Test User Transactions](#)

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

[Clone Test Users](#)

3. Select (enable) the **Allow creation and use of test users** check box to view the clone test users section.

Test User Admin

Test User Setting

Use this feature to allow creation of test users. Test data will be prevented from being included in extract or analytics.

☒ Allow creation and use of test users

[Save](#) [Cancel](#)

4. In the **Test User to Clone** field, type in the user that you would like to clone. Once you start typing in the user name, the system will search and return a match if one exists.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

[Clone Test Users](#)

5. In the **Number of Cloned Users to Create (Maximum 50)** field, type the number of test users that you would like to use for testing.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

[Clone Test Users](#)

6. Click **Clone Test Users**.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

Clone Test Users

The test users appear in a table below the **Clone Test Users** button.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

Clone Test Users

First Name	Last Name	Login ID	Email Address	Employee ID	Password
Clone	User2	CloneUser2@commasavvy.com	CloneUser2@commasavvy.com	cu2	welcome1
Clone	User3	CloneUser3@commasavvy.com	CloneUser3@commasavvy.com	cu3	welcome1
Clone	User4	CloneUser4@commasavvy.com	CloneUser4@commasavvy.com	cu4	welcome1

These test users will have the same permissions, roles, and groups as the source user from which they were cloned. However, their preferences will not be copied over but instead set to the default preferences.



For more information, refer to the *Shared: Test User Setup Guide*.

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

New Concur Logo

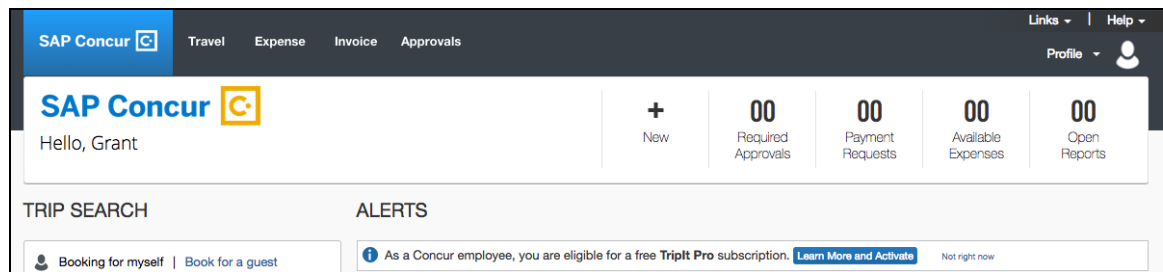
SAP Concur

Overview

In January – on the release date or shortly after – the SAP Concur logo will appear in all Concur products.

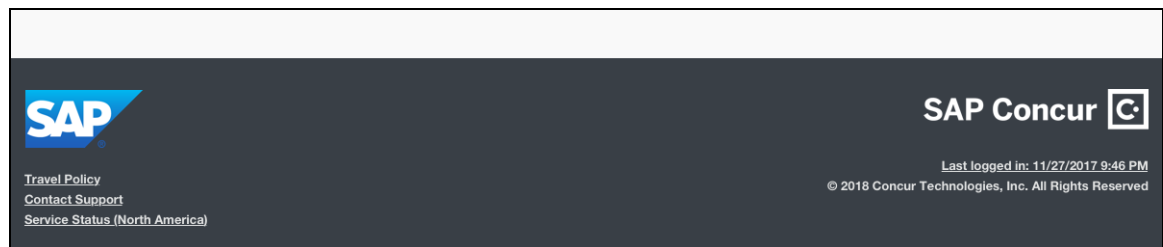
What the User Sees

The new logo will be displayed in the upper-left corner of each page.

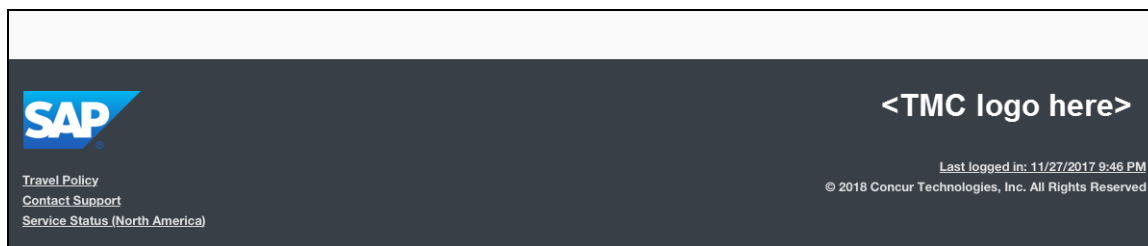


! EXCEPTION: The new SAP Concur logo does not appear *if* the client's logo is displayed in the upper-left corner. The client's logo remains.

Both the SAP and Concur logos appear in the footer.



If a Travel Management Company (TMC) has rebranded in the footer, in addition to the TMC logo, the SAP logo will appear.



Configuration/Feature Activation

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

Travel Allowance

Reinstatement of Recent Changes – Finland

Overview

The following recent changes to the travel allowance feature for Finland that were rolled back as part of the September 2017 release, are reinstated as of the January 2018 release:

- **Change to Rate Location and Allowance Determination** (described in the August 2017 version of these Release Notes)
 - For partial-day trips, less than 24 hours in total, if there is a minimum of 10 hours of consolidated foreign travel, the rate location is determined from the last foreign location visited.
 - For full 24-hour days ending in transit, if the user is leaving a foreign country to Finland, the rate location is determined from that foreign country. Instead, if user is leaving Finland to a foreign country, the rate location is determined from that foreign country. In this case, the direction of travel does not matter as long as it is a mixed-trip combination of foreign and domestic travel.
 - For each day in a multi-day trip, if there is a minimum of 10 hours of consolidated foreign travel, the rate location is determined from the last foreign location visited.
- **Per Diem Location Based on 24-Hour Day** (described in the February 2017 version of these Release Notes)
 - Finland's calculations for the 24-hour "per diem" rate is now based on the location of the traveler exactly 24 hours following their departure. This change accommodates new legal regulations, and retires the standard end of calendar day calculation. (11:59:59 P.M. end of day). Now, if a traveler departs for a trip at 8:00 A.M., their calculated per

diem rate is based on their location at 7:59:59 A.M. the next day, or 24 hours following departure.

BUSINESS PURPOSE/CLIENT BENEFIT

These changes allow Concur clients who do business in Finland to maintain best-practice legal compliance and bring Expense and the traveler into compliance with Finland's revised per diem calculation mandate.

Configuration/Feature Activation

To enable these changes, you must enable the **Use End Of 24 Hour Day Scenarios** calculation property.

► **To enable the Use End Of 24 Hour Day Scenarios calculation property**

7. Log in to Concur as an Admin.
8. Click **Administration / Expense / Travel Allowance / Calculation Properties** (tab).

Travel Allowance

Configurations Employee-Related Configurations Rates Configuration Sets Itinerary Search Calculation Properties

Calculation Method: Finnish Rules

Modify

Name	Label	Type	Value
domestic_provided_meals_factor	Domestic Provided Meals Factor (percent)	edit	50
international_provided_meals_factor	International Provided Meals Factor (percent)	edit	50
trip_duration_hours	Trip Duration Hours (integer between 0 and 23)	edit	10
trip_duration_min_hours	Trip Duration Minimum Hours (integer between 0 and 23)	edit	6
use_end_of_24hour_day_scenarios	Use End Of 24 Hour Day Scenarios	edit	Y

9. From the Calculation Method list, select Finnish Rules.
10. Select **Use End Of 24 Hour Day Scenarios**.
11. Click **Modify**.
12. In the **Value** field, enter Y.
13. Click **Save**.

USB IC Card Readers – Japan

No Longer Supported

Overview

As mentioned in the December 2017 version of these release notes, the USB IC Card reader solution for capturing Japanese IC Card travel information in Expense utilized a reader connected to a single computer.

Important dates:

- On **August 1, 2017**, Concur discontinued support for this solution.
- As of **December 31, 2017**, the solution is retired and will no longer work in Concur.

! IMPORTANT: After December 31st, users will not be able to import via the USB IC Card Reader as **Read Card** (button) will be disabled. The **IC Card** button will still be available if there are entries left in the system, which have been read-in before December 31st. The **IC Card** button will disappear if there are no entries left in the system.

As a replacement, Concur's current solution uses a Network IC Card Reader, which our Japanese clients are already deploying. The Network IC Card Reader has the benefit of allowing multiple users to import transactions at a central location.



For the Network IC Card Reader release note, refer to the October 2016 version of this document.

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement keeps Concur users aligned with current technology.

Configuration/Feature Activation

Concur automatically retired this solution and discontinued support for it. To use the replacement Network IC Card Reader solution, contact your Concur Client Executive. The current solution requires a small implementation project and the purchase and installation of IC card readers from a specific manufacturer.



For general information about Concur's use of IC card readers, refer to *Expense: Japan Public Transportation Setup Guide* and *Expense: Japan Public Transportation User Guide*.

Planned Changes

The items in this section are targeted for future releases. Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Discontinue Privacy Agreement, Customization, and Policy**

Overview

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Available Expenses

****Planned Changes** New One-Year Filter**

Currently additional design work is being done for this feature, which incorporates client feedback. In February, Concur plans to provide details about the revised design.

Overview

The **Available Expenses** list on the **Manage Expense** page will soon no longer display expenses older than one year.

BUSINESS PURPOSE/CLIENT BENEFIT

This new feature automatically filters expenses with transaction dates older than one year and only displays expenses added within the past 12 months, to provide an easier end user experience. This change is consistent with behavior in the **Available Receipts** sections (where unused receipts older than one year are hidden) and will result in improved performance by reducing the volume of old, unneeded data.

Configuration/Feature Activation

Concur will automatically implement this change; there will be no configuration or activation steps.

Budget

****Planned Change** New Budget Feature in Early Adopter Program**

This feature is available to Early Adopter clients only. Budget will be a phased release starting in March with availability to all clients targeted in Q2.

Overview

The Budget feature enables clients to set up all components of a budget; a fiscal year to determine the budget period, budget tracking fields to track spending on a cost center (profit center) level, budget categories to group expense types for budget purposes and budgets, which are the actual annual budgets, and Budget Items, which define the budget including fiscal year, budget owner, budget name and description.

This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense (reports).

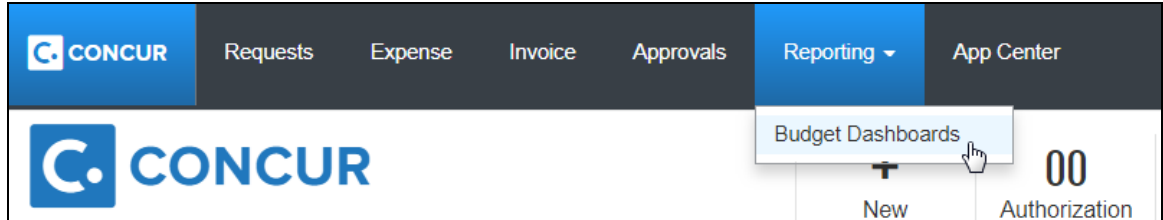
NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget feature share data between both calendars.

BUSINESS PURPOSE/CLIENT BENEFIT

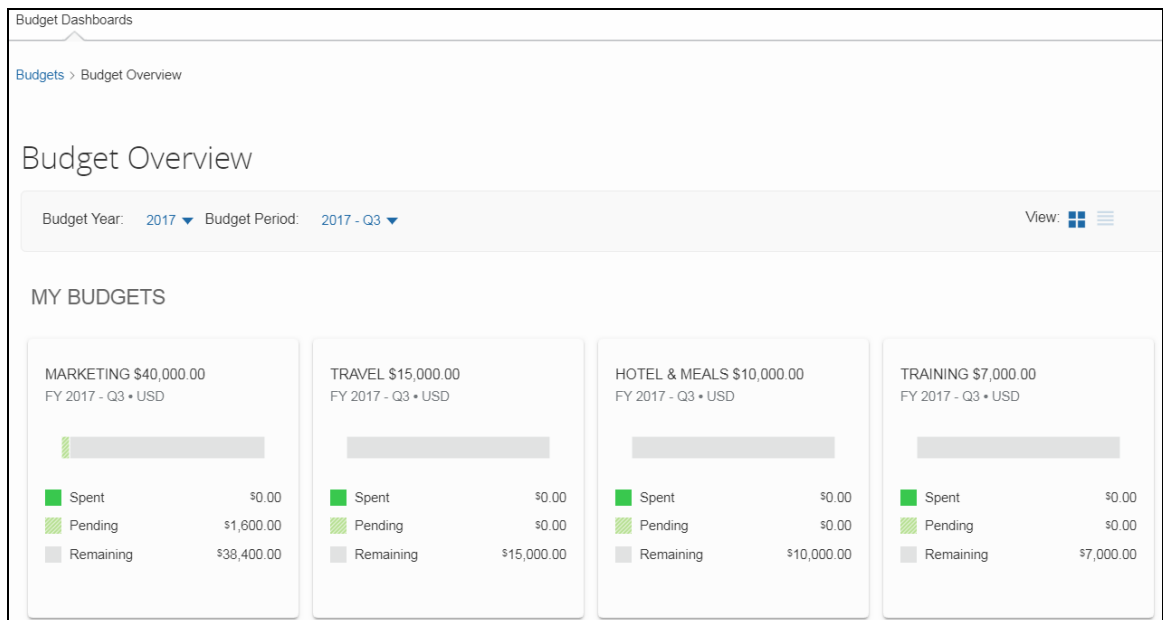
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

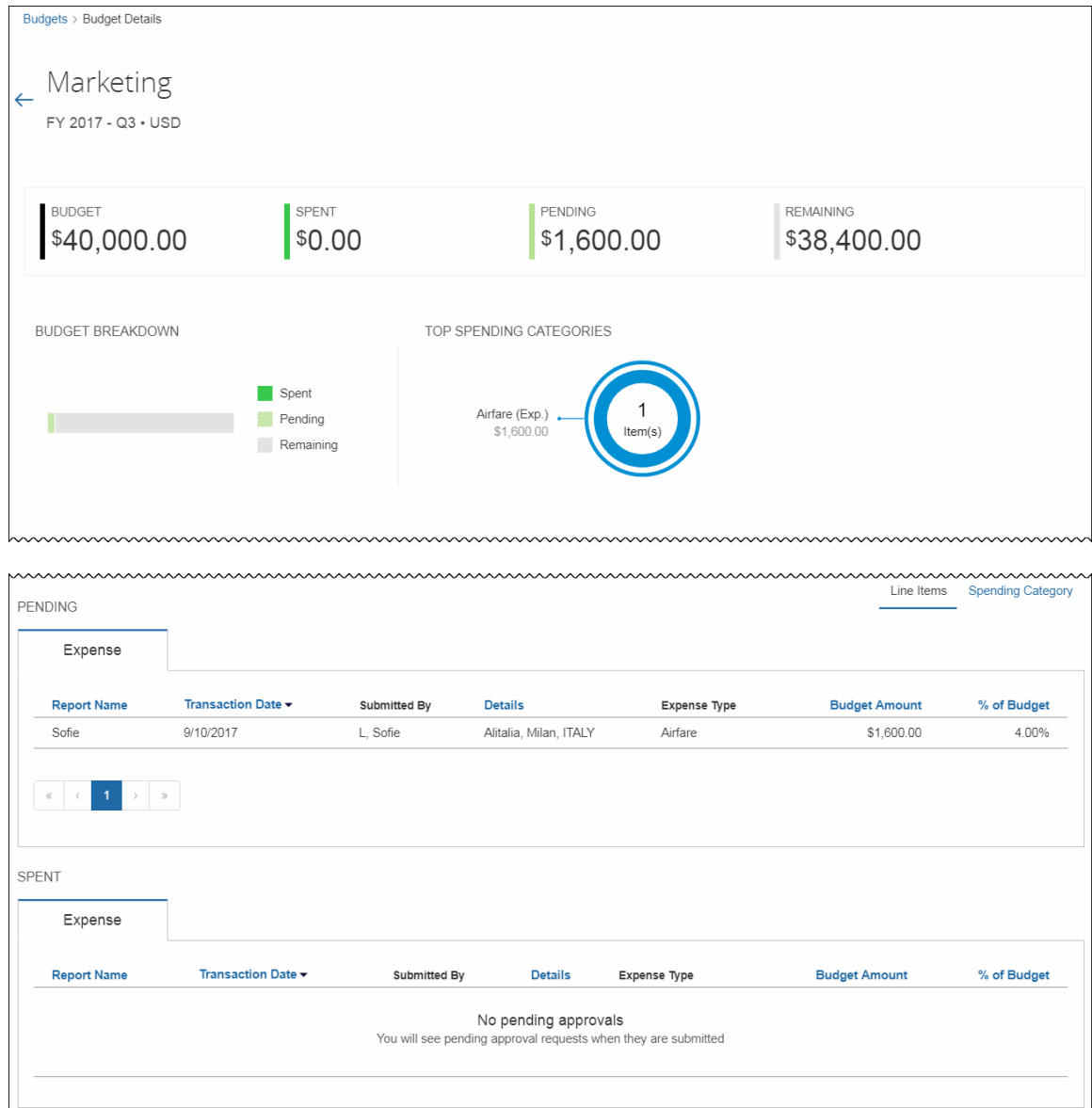
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.



Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



Clicking on one of the budget will show details about that budget.



What the Admin Sees

The admin will see a new menu, **Budget Configuration**, in Expense Admin. The Budget Configuration page contains five tabs: **Budget Items**, **Fiscal Calendar**, **Budget Category**, **Budget Tracking Fields**, and **Budget Settings**.

NOTE: To access the **Budget Settings** tab, users need to have the Budget Administrator role.

Budget Items tab:

Budget Configuration

Budget Items | Fiscal Calendar | Budget Category | Budget Tracking Fields | Budget Settings

New | Modify | Remove | Import

Budget Name ▲	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
Company01	2017	John Last	Company Travel ...	\$120,000.00	USD
Company02	2017	John Last	Company IT Budget	\$60,000.00	USD

Page 1 of 1 | Displaying 1 - 21 of 21

Fiscal Calendar tab:

Budget Configuration

Budget Items | **Fiscal Calendar** | Budget Category | Budget Tracking Fields | Budget Settings

New | Modify | Activate | Deactivate | Remove

☐ Fiscal Year	Start Date ▼	End Date	Active
☐ 2019	01/01/2019	12/31/2019	Yes
☐ 2018	01/01/2018	12/31/2018	Yes
☐ 2017	01/01/2017	12/31/2017	Yes

Budget Category tab:

Budget Configuration

Budget Items | Fiscal Calendar | **Budget Category** | Budget Tracking Fields | Budget Settings

New | Modify | Remove

Budget Category ▲	(Invoice) Expense Types	(Expense) Expense Types
IT	Software Cellular Telephone Telecommunication Equipment Internet Telecommunication Services Computing Equipment	Long Distance Local Phone Cellular Phone
Marketing	Marketing Trade Show	Misc. Promotional Expense Trade Shows
Travel	Travel Conference/Seminar Fees	Company Car Mileage Fixed Meals (gross) Limousine Company Car Wash Subway Company Car Oil Fixed Meals Room Tax Gas

Page 1 of 1 | Displaying 1 - 3 of 3

Budget Tracking Fields tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[Budget Fields](#)
[Budget Field Mapping](#)

[New Field](#)
[New Connected Field](#)
[Modify](#)
[Remove](#)
[Save Sequence](#)

☐ Budget Tracking Field	Field Type	List	Sequence ▲
☐ Department Function	Connected List	Function	↓
☐ Region Country	Connected List	Geography	↓ ↑
☐ Product Group Product	Connected List	Product	↓ ↑

Budget Settings tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[Save](#)
[Cancel](#)

Time Zone: GMT-08:00

Alert Limit Percent: 80

Control Limit Percent: 100

Send alert limit notifications: ☒

Send control limit notifications: ☒

Alternative Manager: Travel Manager ▼

Include Pending: ☐

Disable Budget Tracking Mapping Field Type filter: ☐

Enable Expense: ☒

Enable Purchase Request: ☒

Enable Payment Request: ☒

Configuration/Feature Activation

Concur needs to activate this features in a Concur internal-only tool.

Once Concur has activated the Budget feature, the Budget Administrator needs to configure the feature in the Budget Configuration tool in Expense Admin.

Legacy Expense Authorization Request

****Planned Changes** Product Retirement (*March 2018*)**

Overview

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018.

Concur offered this feature to some clients prior to the existence of the standalone Concur Request product. We now have feature parity as well as enhanced features and full support on the standalone Request product. Clients that wish to leverage a request capability within Concur should purchase and migrate to the Concur Request product.

A client-facing FAQ is available: http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement allows Concur to focus development resources on further enhancements to our standalone Concur Request product whose functionality, innovation, and value now exceeds that of our legacy feature.

Configuration/Feature Activation

Concur has already initiated communication with clients who have recently used our legacy Expense Authorization Request feature to plan migrations to our standalone Concur Request product.



For this change, Concur has archived the *Expense: Authorization Requests Setup Guide* and *Expense: Authorization Requests User Guide*.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.

The screenshot displays the Concur Expense Administration Help interface. At the top, the Concur logo and navigation tabs (Requests, Travel, Expense, Invoice, Approvals, Reporting, App Center) are visible. A user greeting 'Hello, Terry' and summary statistics (61 Authorization Requests, 08 Purchase Requests, 696 Payment Requests) are shown. The 'Help' dropdown menu is open, listing various help topics, with 'Expense Administration Help' highlighted. Below this, the 'Resources for Administrators - Professional Edition' page is shown, with 'Resources for Administrators - Professional Edition' highlighted in the left sidebar. The main content area lists various resources, including 'What's New - Professional Edition', 'Client Fact Sheets (English only)', 'User Interface Icons', 'Concur Training Toolkit', and 'Concur for Mobile (English only)'. A second screenshot below shows the 'Expense Professional Administration Guides' page, with 'Expense Professional Administration Guides' highlighted in the left sidebar. The main content area lists various guides, including 'Expense Setup Guides (English Only)', 'Format (English Only)', 'Account Codes', 'Allocations', 'Attendees', 'Audit Rules', 'Audit Rules (Validation Rules)', 'Budget Insight', 'Car Configuration', and 'Cash Advance'.

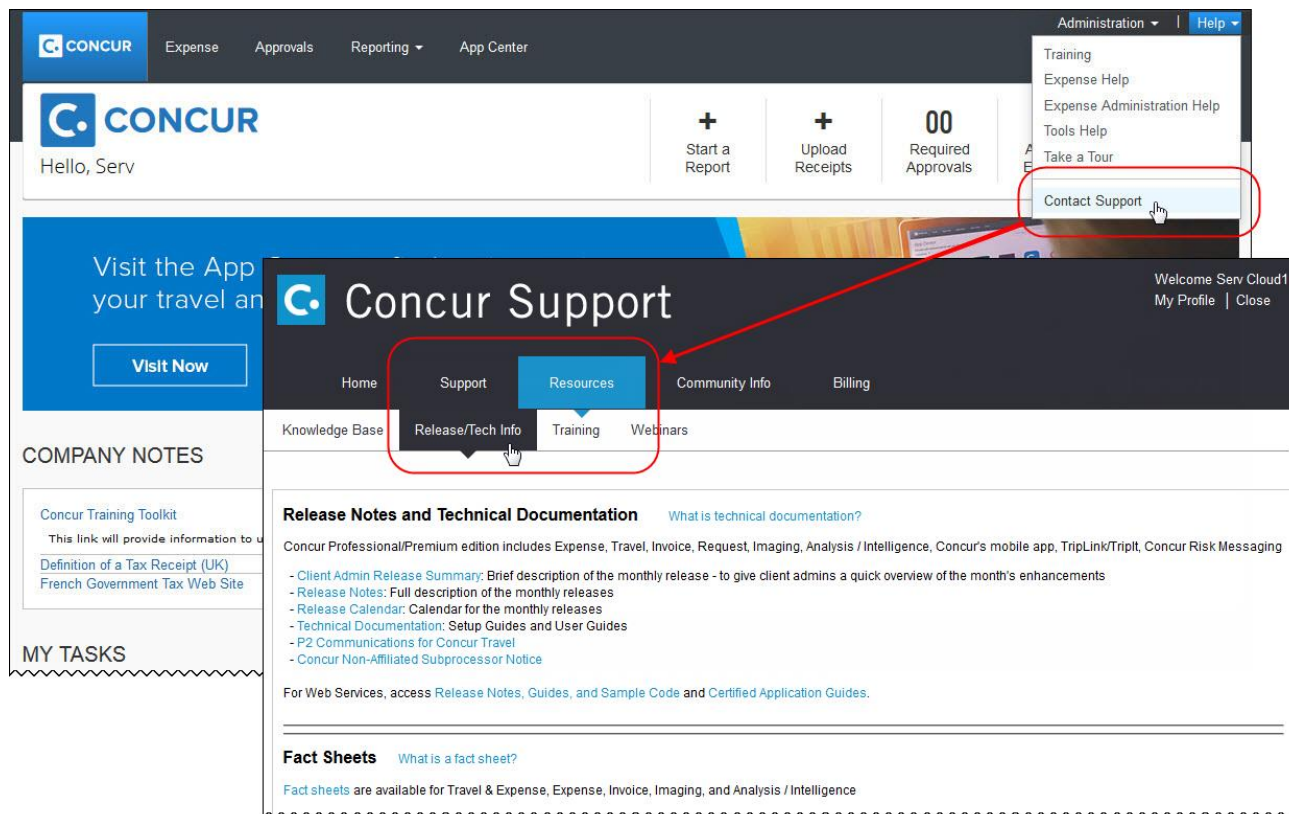
Expense Setup Guides (English Only)	Format (English Only)
Account Codes	PDF
Allocations	PDF
Attendees	PDF
Audit Rules	PDF
Audit Rules (Validation Rules)	PDF
Budget Insight	PDF
Car Configuration	PDF
Cash Advance	PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

Additional Release Notes and Other Technical Documentation: Concur Support Portal – Selected Users

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



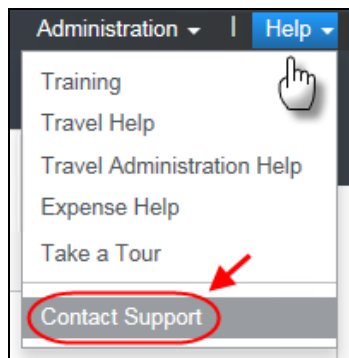
Cases

Steps for Getting a Status

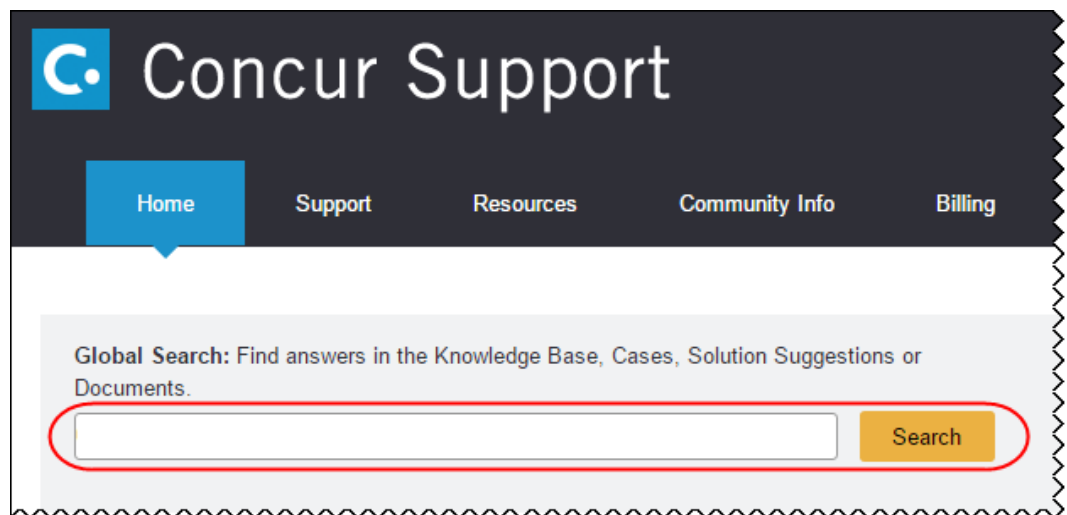
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
2. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the Concur system internally. Please contact your internal support desk for assistance.

3. Enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

January Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
10406146	Global Pay No details were available in Administration > Company > Tools > Monitor Batches - View Funding > Global Funding when the batch type was Cash Advance. <i>Concur has corrected the code and now details display for Cash Advance batches.</i>

Concur Release Notes	
Expense Professional / Premium	
Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: February 10 2018 Update #1: Tuesday, February 20, 3:00 PM PT	Client FINAL

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Release Notes

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

All companies must take all reasonable steps to protect the personal and sensitive information of their employees. As per recommended security-related best practices, remember that custom fields should not contain personal and sensitive data.

! IMPORTANT: Data in custom fields is not encrypted. The client is solely responsible for any liability resulting or arising from improper use.

If your company is currently using custom fields to store personal or sensitive data (for example, Social Security numbers, family member names, or any other personally identifying information), you should plan to remove this information from your existing fields within the service and modify your current configuration.

Next Steps

For information about your configuration and the use of custom fields, contact Concur Client Support or your Account Manager.

Budget

New Budget Feature in Early Adopter Program

This feature is available to Early Adopter clients only. Budget will be a phased release starting in March with availability to all clients targeted in Q2.

Overview

The Budget feature enables clients to set up all components of a budget; a fiscal year to determine the budget period, budget tracking fields to track spending on a cost center (profit center) level, budget categories to group expense types for budget purposes and budgets, which are the actual annual budgets, and Budget Items, which define the budget including fiscal year, budget owner, budget name and description.

This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense.

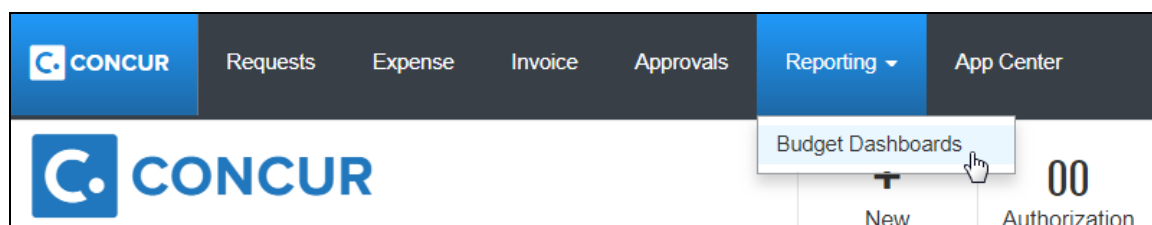
NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget feature share data between both calendars.

BUSINESS PURPOSE/CLIENT BENEFIT

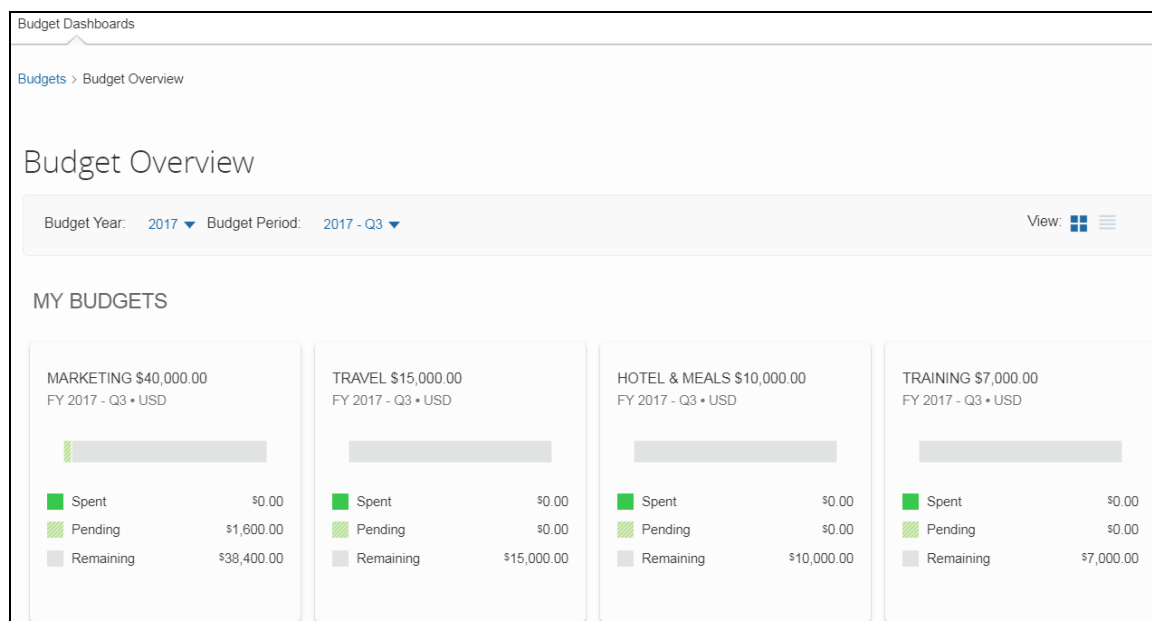
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

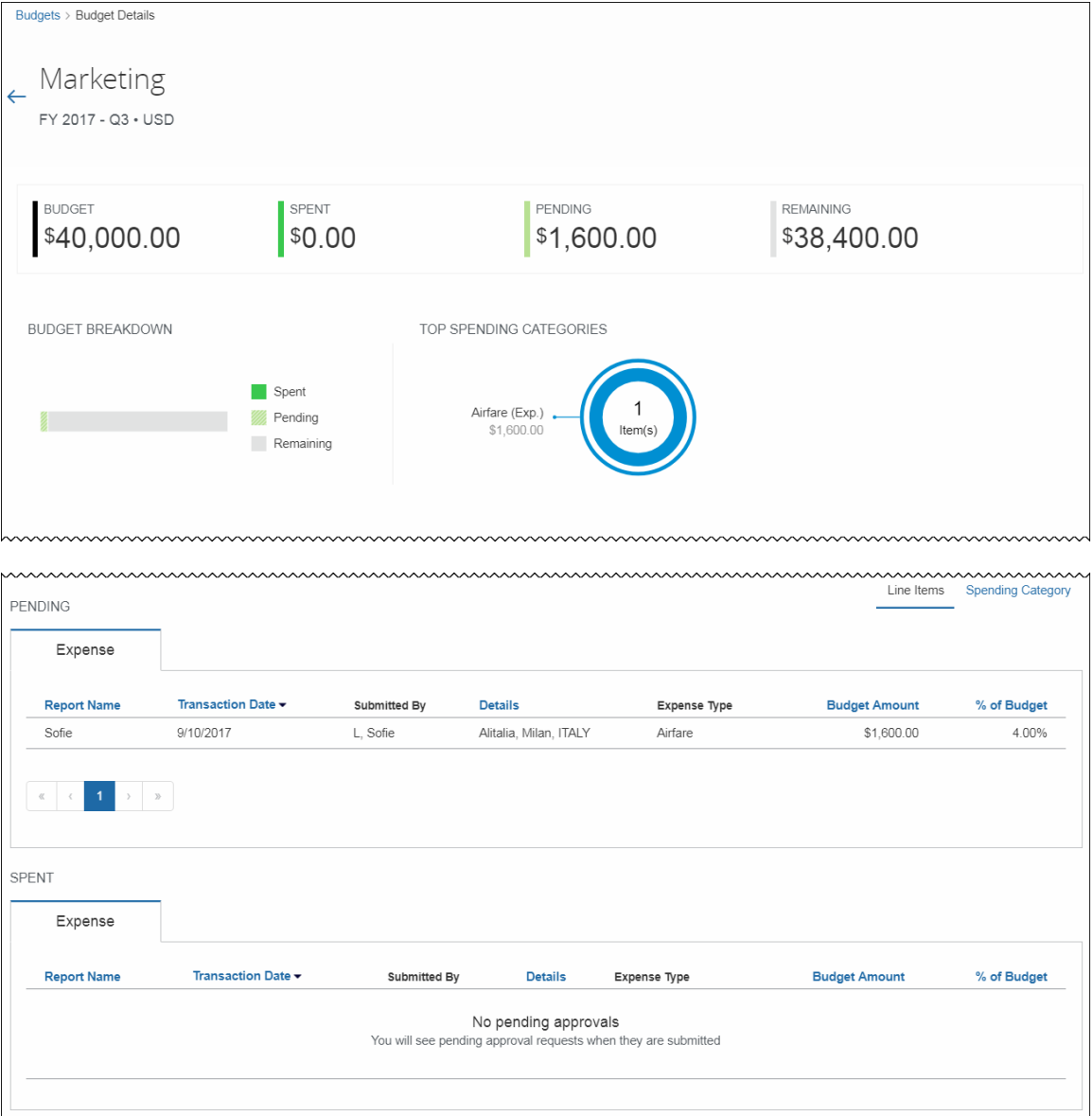
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.



Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



Clicking on one of the budget will show details about that budget.



What the Admin Sees

The admin will see a new menu, **Budget Configuration**, in Expense Admin. The Budget Configuration page contains five tabs: **Budget Items**, **Fiscal Calendar**, **Budget Category**, **Budget Tracking Fields**, and **Budget Settings**.

NOTE: To access the **Budget Settings** tab, users need to have the Budget Administrator role.

Concur Budget Configuration page. The 'Budget Configuration' tab is highlighted in the left sidebar. The main content area shows the 'Budget Items' tab with a table of budget items.

Budget Name	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
John01	2017	John Last	John's Budget	\$100,000.00	USD
John02	2017	John Last	John's Team Budget	\$80,000.00	USD
John03	2017	John Last	John's Team Trav...	\$40,000.00	USD

Budget Items tab:

Concur Budget Configuration page, 'Budget Items' tab. The 'Budget Items' tab is highlighted in the left sidebar. The main content area shows a table of budget items with pagination.

Budget Name	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
Company01	2017	John Last	Company Travel ...	\$120,000.00	USD
Company02	2017	John Last	Company IT Budget	\$60,000.00	USD

Page 1 of 1 | Displaying 1 - 21 of 21

Fiscal Calendar tab:

Concur Budget Configuration page, 'Fiscal Calendar' tab. The 'Fiscal Calendar' tab is highlighted in the left sidebar. The main content area shows a table of fiscal years with start and end dates.

Fiscal Year	Start Date	End Date	Active
2019	01/01/2019	12/31/2019	Yes
2018	01/01/2018	12/31/2018	Yes
2017	01/01/2017	12/31/2017	Yes

Budget Category tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[New](#)
[Modify](#)
[Remove](#)

Budget Category ▲	(Invoice) Expense Types	(Expense) Expense Types
IT	Software Cellular Telephone Telecommunication Equipment Internet Telecommunication Services Computing Equipment	Long Distance Local Phone Cellular Phone
Marketing	Marketing Trade Show	Misc. Promotional Expense Trade Shows
Travel	Travel Conference/Seminar Fees	Company Car Mileage Fixed Meals (gross) Limousine Company Car Wash Subway Company Car Oil Fixed Meals Room Tax Gas

< < | Page 1 of 1 | > > | ↺

Displaying 1 - 3 of 3

Budget Tracking Fields tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[Budget Fields](#)
[Budget Field Mapping](#)

[New Field](#)
[New Connected Field](#)
[Modify](#)
[Remove](#)
[Save Sequence](#)

☐ Budget Tracking Field	Field Type	List	Sequence ▲
☐ Department Function	Connected List	Function	↓
☐ Region Country	Connected List	Geography	↓ ↑
☐ Product Group Product	Connected List	Product	↓ ↑

Budget Settings tab:

Budget Configuration

Budget Items | Fiscal Calendar | Budget Category | Budget Tracking Fields | **Budget Settings**

Save Cancel

Time Zone: GMT-08:00

Alert Limit Percent: 80

Control Limit Percent: 100

Send alert limit notifications: ☒

Send control limit notifications: ☒

Alternative Manager: Travel Manager

Include Pending: ☐

Disable Budget Tracking Mapping Field Type filter: ☐

Enable Expense: ☒

Enable Purchase Request: ☒

Enable Payment Request: ☒

Configuration/Feature Activation

Concur needs to activate this features in a Concur internal-only tool.

Once Concur has activated the Budget feature, the Budget Administrator needs to configure the feature in the Budget Configuration tool in Expense Admin.



For more information, refer to the *Shared: Budget Setup Guide*, the *Shared: Budget Item Import User Guide*, the *Budget Client Fact Sheet*, and the *Budget FAQ*.

Company Card

New Fields for Japan Credit Bureau Import Format

Overview

With this release, the Japan Credit Bureau (JCB) card import can now capture additional data included in overseas transactions. This is useful for clients who want to use these fields in their workflow and accounting extract configurations to capture this transaction data for their financial systems.

These fields include:

- **Merchant Country Code**
- **Merchant State**
- **Merchant City**

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement benefits the Concur Japan market by allowing Expense to capture additional data found in overseas transactions.

Configuration/Feature Activation

Japan Credit Bureau (JCB) will support this feature from April 2018. Clients who want to enable this feature will need to contact their Account Manager or Sales Executive for assistance. Please note that it generally takes 3 months from application to begin receiving the card feed from JCB.

Concur Salesforce Connector

Version 1.113 Supports Lightning

Overview

The Concur Salesforce Connector, version 1.113, supports the Lightning edition of Salesforce.

BUSINESS PURPOSE/CLIENT BENEFIT

This change allows Concur Salesforce Connector clients to take advantage of the Lightning edition of Salesforce.

Configuration/Feature Activation

Concur automatically implemented this change with version 1.113; however, some Concur integration steps are different with Lightning compared to previous editions of Salesforce.

To upgrade your version of the Concur Salesforce Connector, contact Concur Client Support.



For more information, refer to the *Shared: Concur Salesforce Connector Setup Guide*.

Expense Pay – Global

New Message for Incomplete Banking Profiles (USD)

Overview

For Expense Pay – Global clients who have an open batch in United States Dollars (USD), a warning will display if the batch contains a disbursement to a user who has an incomplete banking profile, for example they have not yet authorized direct deposit.

BUSINESS PURPOSE/CLIENT BENEFIT

This message helps prevent delays in successful processing of payments.

What the Admin (or User or Implementation) Sees

When applicable, the **View Batches** tab of the **Monitor Batches** page displays a new column, **Warnings**, and the message, **"Incomplete Banking Profile."**

Example

Monitor Batches									
View Batches View Funding Bank Statements									
Advanced Search Payment Demands For Batch Total: 130.00 USD X									
Search Field: Search Value: Status: Paid Date (From): Paid Date (To): Employee Last Name Any Search									
US Batch: Employees Batch Paid By Expense Pay By Concur (c51bbb09-0f)									
Report Name	Report ID	Payment Demand ID	Payee Name	Amount	Payee Bank ID	Payee Account Number	Paid Date	Status	Warnings
Other Test	A5841031E9404C5B929B ...	100002	EPUser1_root, Sam1	110.00 USD	091000019	XXXXXX2345		Assigned	
Test 2	58AC8362966849B190B9 ...	100001	EPManger_1101, Sam	20.00 USD	091000019	XXXXXX2345		Assigned	Incomplete Banking Profile: Banking Use Requirements not a

Configuration/Feature Activation

Concur automatically implemented this change; there are no configuration or activation steps.



For this change, Concur has updated the *Expense: Payment Manager for Expense Pay Global User Guide*.

Spend Categories

Airline Fees and Goodwill Spend Categories Removed

Overview

With this release, Concur has removed the *Airline Fees* and *Goodwill* spend categories from the **Spend Category** list on the **Expense Types** page (**Administration > Expense > Expense Types** (left menu)). These two spend categories are no longer available for selection. Instead, clients should use the *Donations* and *Booking Fee* spend categories.

NOTE: If an existing expense type is currently assigned to the *Airline Fees* or *Goodwill* spend category, the expense type will continue being assigned to that spend category.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement cleans up the list of spend categories.

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

Planned Changes

The items in this section are targeted for future releases. Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Opt Out of In-Product Messaging (United States)**

Overview

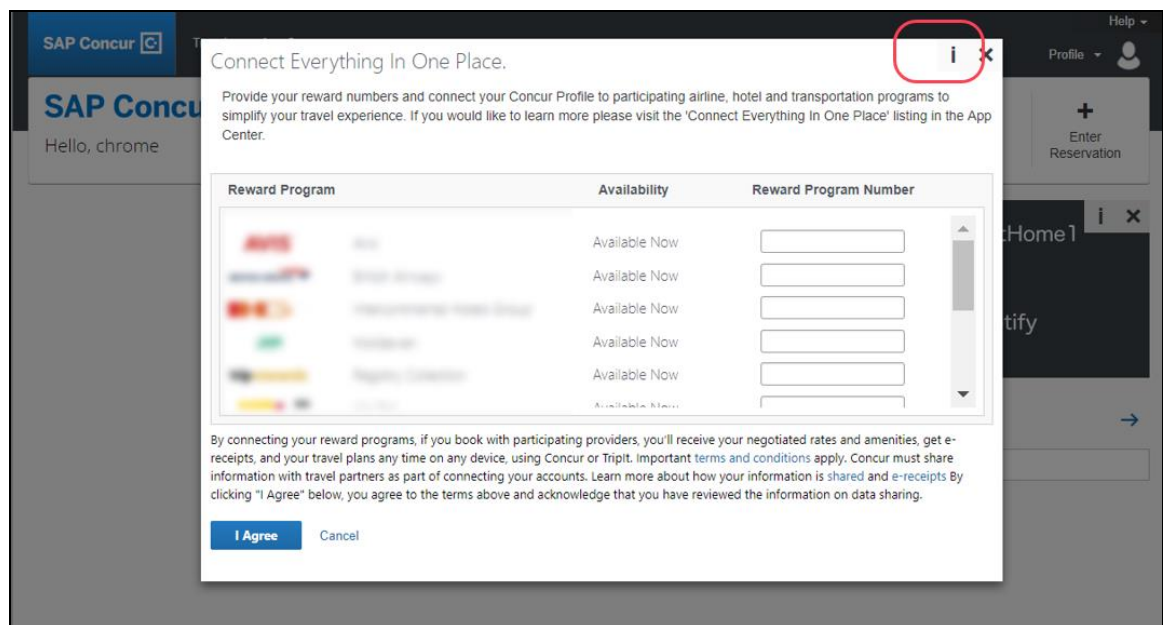
Last year, when in-product messaging was introduced in Europe, the feature included the ability for users to opt out of messaging.

Targeted for the March release, Concur will provide customers in the United States the ability to opt out.

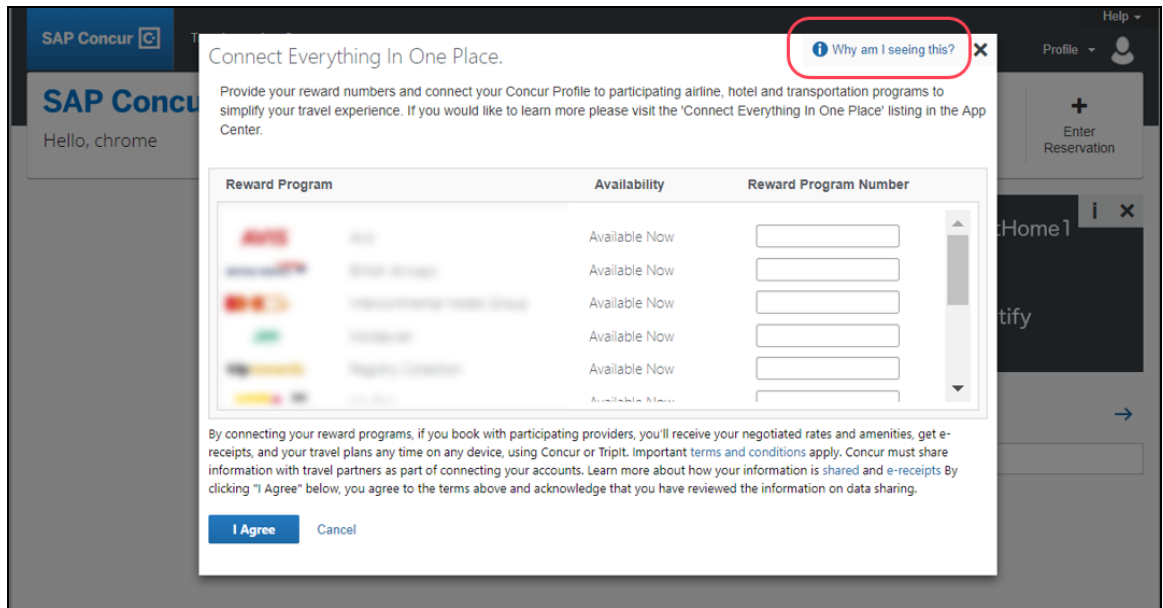
What the User Sees

MESSAGES

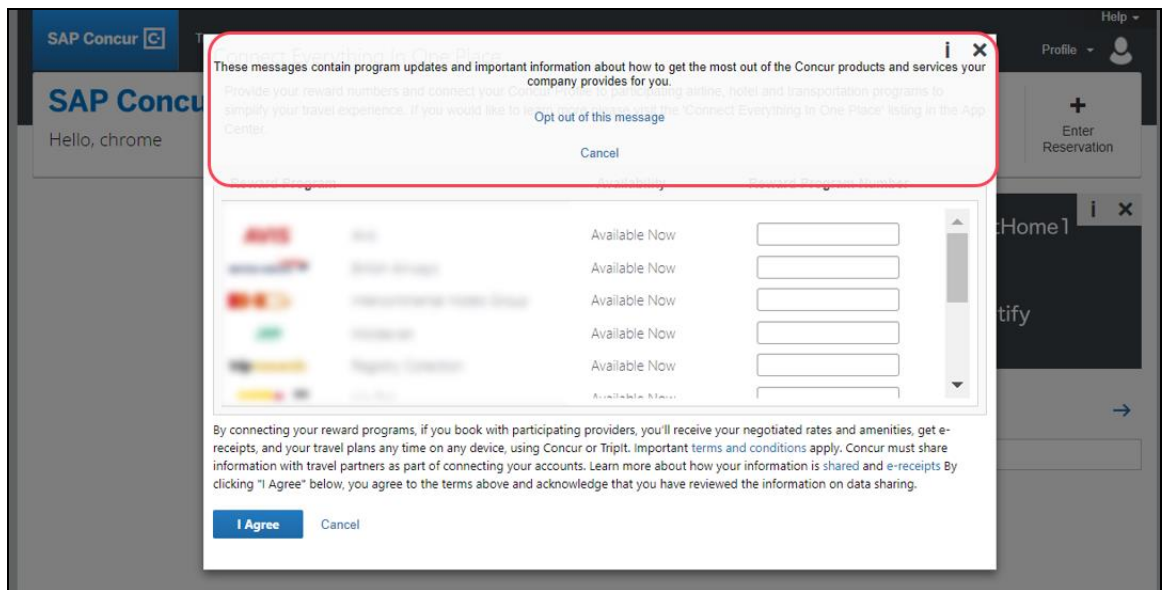
An information icon appears in the upper-right corner of the message.



When the user clicks it or hovers the mouse pointer over it, the *Why am I seeing this?* message appears.



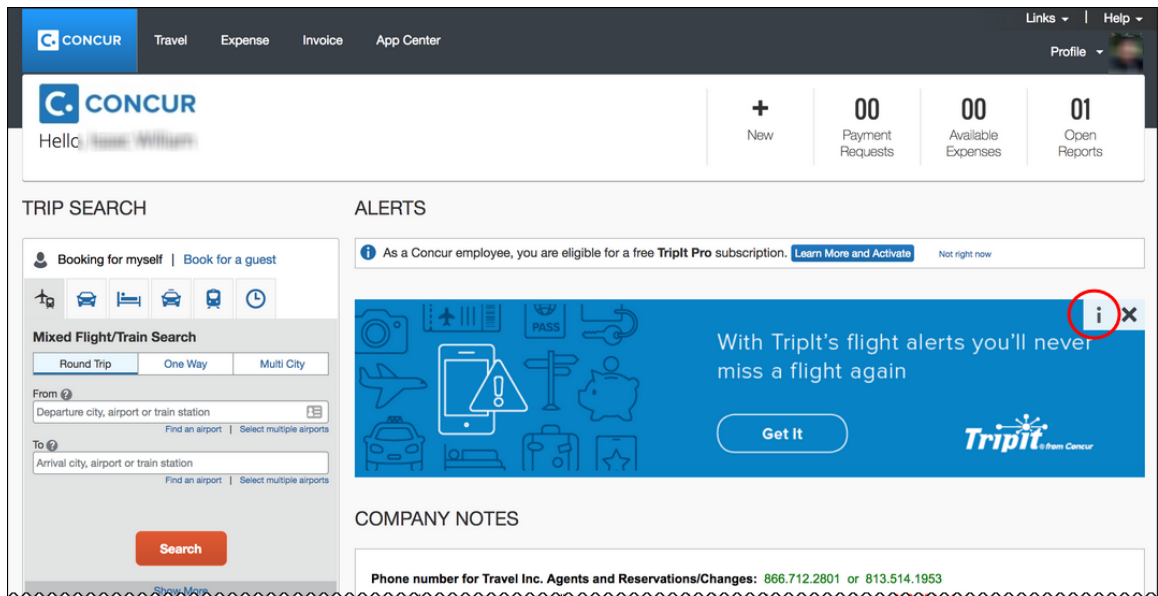
When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other categories.



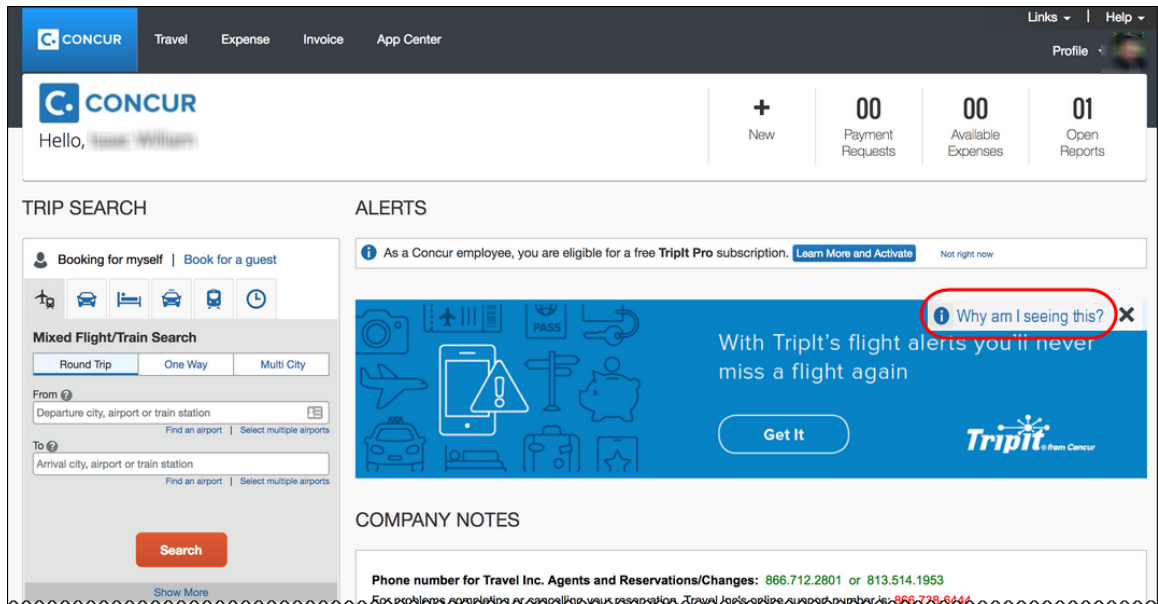
When the user clicks the close button (X in the upper-right corner), the window closes.

IN-PAGE MESSAGES

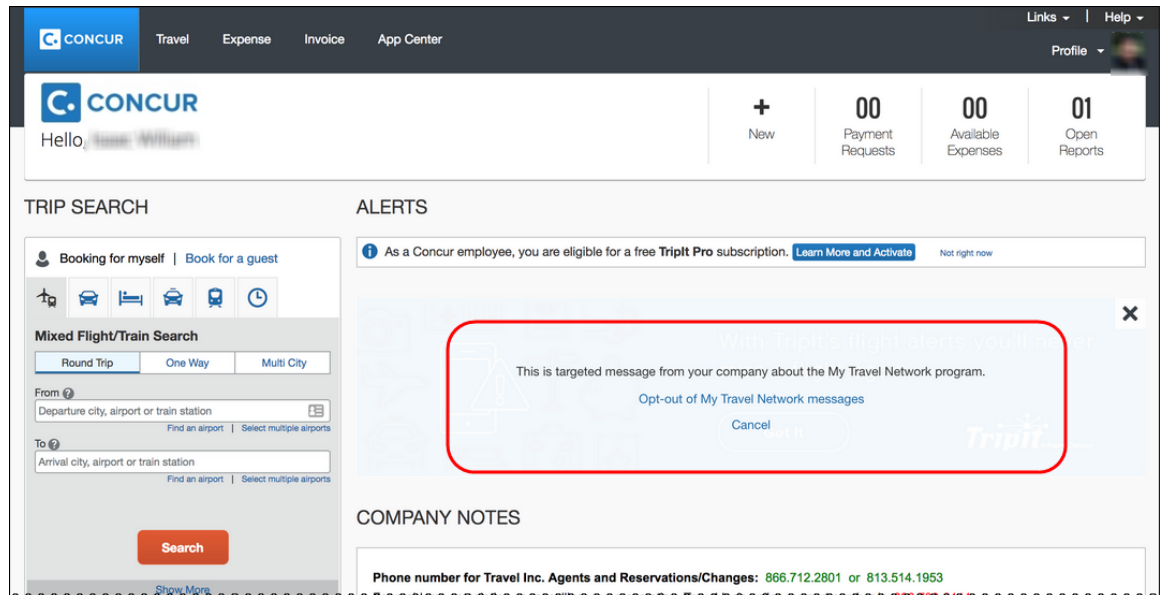
An information icon appears in the upper-right corner of the message.



When the user clicks it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this message as well as a link for the user to click to opt out of seeing similar messages in the future. The user could still be shown IPM relating to other categories.



When the user clicks the close button (X in the upper-right corner), the message collapses and is removed from the page entirely.

Configuration / Feature Activation

Concur will automatically implement this change; there will be no additional configuration or activation steps.

****Planned Changes** Removing the "Privacy Agreement" Page**

Overview

For clients who currently display the **Privacy Agreement** page to users, be aware that on **April 14, 2018**, Concur will eliminate that page. That means, the privacy agreement will no longer display, under any circumstances. In addition, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

In a separate release, Concur will provide a standard privacy statement, which can be accessed via a link in the page footer.

This release note discusses the removal of the **Privacy Agreement** page and its associated configuration options. Information about the new Concur privacy statement will be provided in future release notes.

The intent of the change is to ensure that all customers see the same unmodified Concur privacy statement.

FAQs

Q. Why can't I continue using this feature?

A. Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within Concur services.

Q. When will the existing **Privacy Agreement** page be removed?

A. On April 14, 2018, the page will be removed; users will no longer see the privacy agreement – whether customized or generic.

Between now and April 14, if you want to remove your customized privacy agreement from the **Privacy Agreement** page, you can. For clients who have access to the custom text option or the privacy agreement settings, you can make those changes yourself. For clients who do not have access to the custom text option or the privacy agreement settings, you can contact Concur Client Support for assistance.

No action is necessary. You do not have to make changes now unless you want to.

Q. What will Concur provide in place of the current **Privacy Agreement** page?

A. Some clients have used the **Privacy Agreement** page to convey company-specific information to its users. That option will no longer be available. Instead, the Concur privacy statement – accessible via a link the page footer – will describe Concur's processing activities of customer data.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Clients must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. When the new Concur privacy statement is implemented; will I be able to modify it or require that users accept it?

A. The Concur privacy statement will not be configurable by clients in any way. Its function is to describe Concur's processing activities of client data.

Q. Who can I contact for more information?

A. You can contact Concur Client Support for additional information regarding these settings and/or Concur's updated privacy statement.

Configuration / Feature Activation

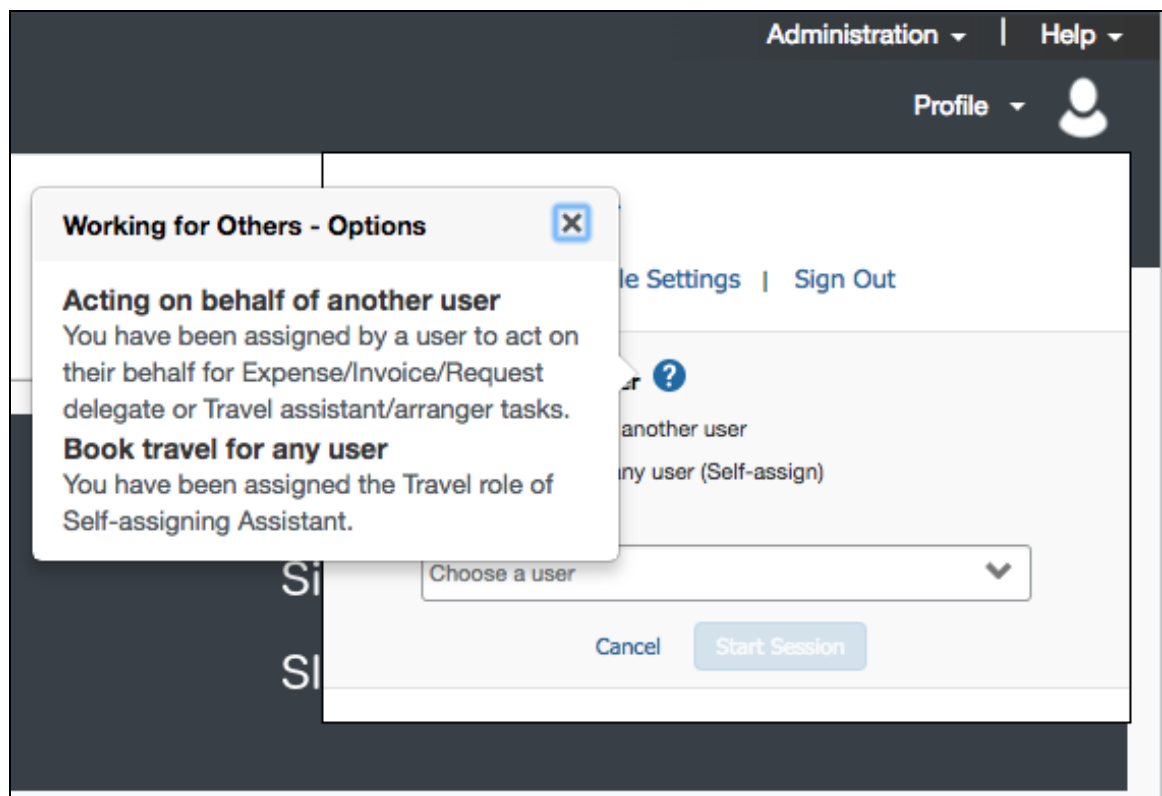
The **Privacy Agreement** page and associated configuration options will be automatically removed. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

Accessibility

****Planned Changes** Keyboard Access for Working for Others Quick Help**

Overview

The **Working for Others** Quick Help contains important information and should be available to everyone. Currently, it is available only by clicking the "?" icon with a mouse. With the March release, the **Working for Others** Quick Help will become accessible via the keyboard.



USER/CUSTOMER BENEFIT

Working for Others Quick Help will be available to mouse users and keyboard users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

****Planned Changes** Alternative Text for the Logo on the Sign In Page**

Overview

In June of 2017, accessibility tests for the June 2017 VPAT identified exceptions to the WCAG 2.0 global standards of the W3. These exceptions are identified issues where the location or action did not adhere to the A or AA standard of specific WCAG 2.0 rules. Resolving this issue improves our accessibility quality on the targeted location or action by aligning it to the appropriate WCAG standard.

Effectively, the issue and resolution is this: Screen readers are a type of assistive technology that audibly reads each screen element (instructional text, fields, options, etc.) to the user. Proper coding (in this case, known as *alternative text* or *alt text*) is required to ensure the reader "reads" the proper information to the user.

The issue is that the logo on the **Sign In** page does not currently have the proper code to read the logo description to the user. In the March release, this issue will be resolved.



USER/CUSTOMER BENEFIT

Enhancing our products and services to better align to the accessible standards of WCAG 2.0 increases the ability of all Concur users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

****Planned Changes** Remove All Instances of "ConcurAccessible"**

Overview

ConcurAccessible is a feature that provides certain accessibility features. However, with the many accessibility enhancements we have been making, *ConcurAccessible* has become obsolete and is no longer used. In addition, it can create inconsistent UI behavior for users.

Given that, with the March release, all *ConcurAccessible* components will be removed from Concur.

USER/CUSTOMER BENEFIT

This ensures a consistent, better experience for all users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

Data Retention

****Planned Changes** New Feature for Outdated Data**

Overview

This new feature will allow clients to control how long Concur stores their data based on who, when, and where criteria.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

When this feature becomes available, and if it has been requested via Concur Client Support, then on the **Company Admin** page, the client admin will see a **Data Retention** link.

More information will be available in future versions of these Release Notes.



When this feature becomes available, for more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this feature becomes available, you may request that it be enabled for your company by contacting Concur Client Support.

Legacy Expense Authorization Request

****Planned Changes** Product Retirement (*March 2018*)**

Overview

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018.

Concur offered this feature to some clients prior to the existence of the standalone Concur Request product. We now have feature parity as well as enhanced features and full support on the standalone Request product. Clients that wish to leverage a request capability within Concur should purchase and migrate to the Concur Request product.

A client-facing FAQ is available: http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement allows Concur to focus development resources on further enhancements to our standalone Concur Request product whose functionality, innovation, and value now exceeds that of our legacy feature.

Configuration/Feature Activation

Concur has already initiated communication with clients who have recently used our legacy Expense Authorization Request feature to plan migrations to our standalone Concur Request product.



For this change, Concur has archived the *Expense: Authorization Requests Setup Guide* and *Expense: Authorization Requests User Guide*.

New Filter

****Planned Changes** New 23-Month Filter**

Overview

NOTE: This release note supersedes the January release note: *Available Expenses | **Planned Changes** New One-Year Filter*.

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View Transactions
- Unassigned Cash Advances

! IMPORTANT: Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Under View Transactions, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | **Planned Changes** New Feature for Outdated Data* release note included in this month's Planned Changes section of these Release Notes.

Plain Text File Transfer Protocol

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.

The screenshot displays the Concur Expense Administration Help interface. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The main content area is titled "Resources for Administrators - Professional Edition" and lists various help topics. A red circle highlights the "Resources for Administrators - Professional Edition" link in the left sidebar. Another red circle highlights the "Expense Professional Administration Guides" link in the right sidebar. A third red circle highlights the "Expense Professional Administration Guides" link in the bottom sidebar. The interface also shows a "MY TASKS" section with a "TRIP SEARCH" button and a "Help" dropdown menu.

Concur Expense Administration Help

Resources for Administrators - Professional Edition

- Using Online Help
- Legal Notice
- Resources for Administrators - Professional Edition**
- Expense Professional Administration Guides
- Budget Administration Guides
- What's New - Professional Edition
- Release Note Admin Summaries (Translated, HTML Format) - Professional Edition
- Profile

What's New - Professional Edition

- Client Fact Sheets (English only)
- User Interface Icons
- Concur Training Toolkit
- Concur for Mobile (English only)

Expense Professional Administration Guides

- Using Online Help
- Legal Notice
- Resources for Administrators - Professional Edition**
- Expense Professional Administration Guides**
- Budget Administration Guides
- What's New - Professional Edition
- Release Note Admin Summaries (Translated, HTML Format) - Professional Edition
- Profile

Expense Professional Administration Guides

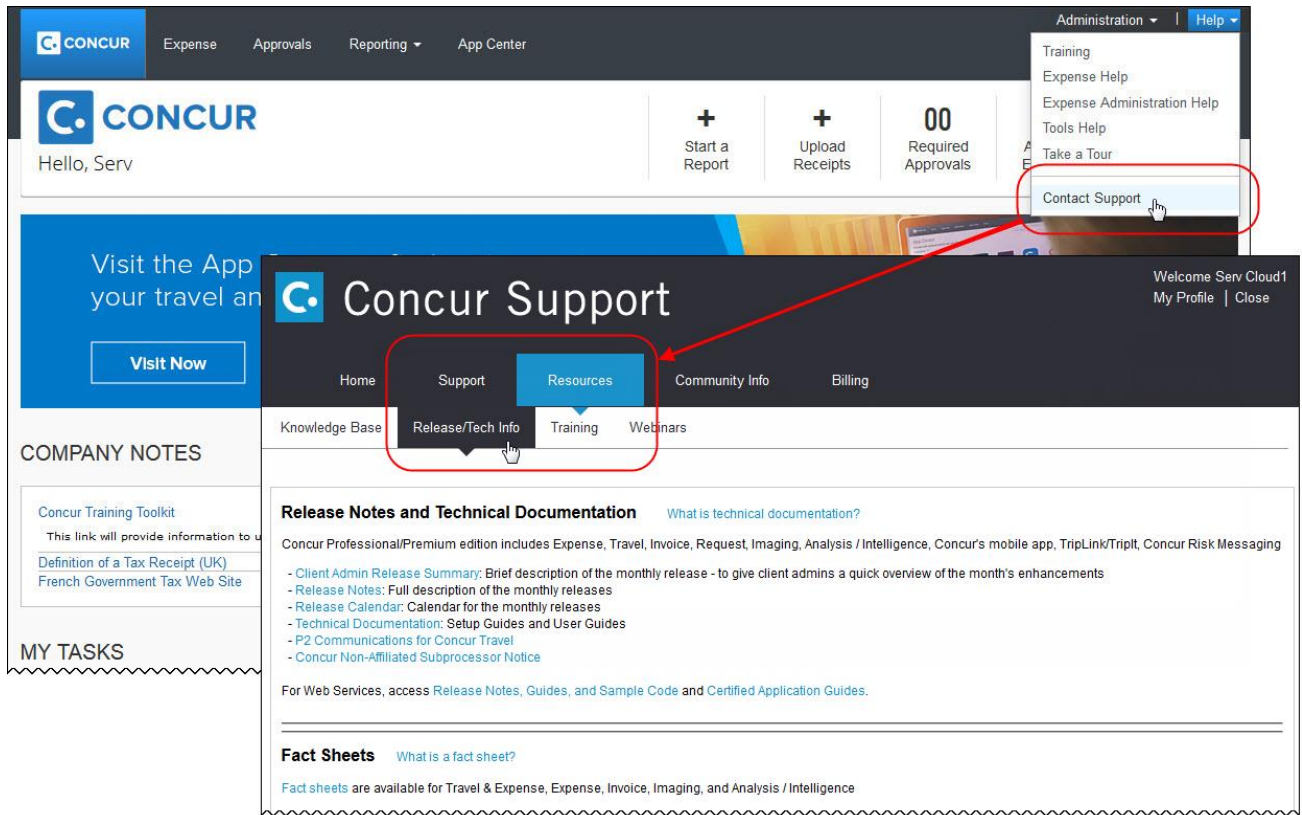
Expense Administration Guides (English only)

Expense Setup Guides (English Only)	Format (English Only)
Account Codes	PDF
Allocations	PDF
Attendees	PDF
Audit Rules	PDF
Audit Rules (Validation Rules)	PDF
Budget Insight	PDF
Car Configuration	PDF
Cash Advance	PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



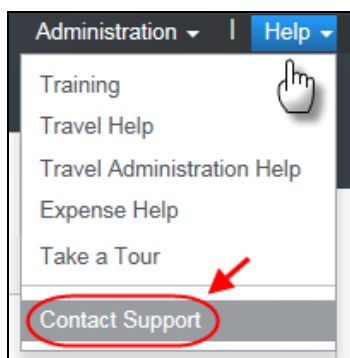
Cases

Steps for Getting a Status

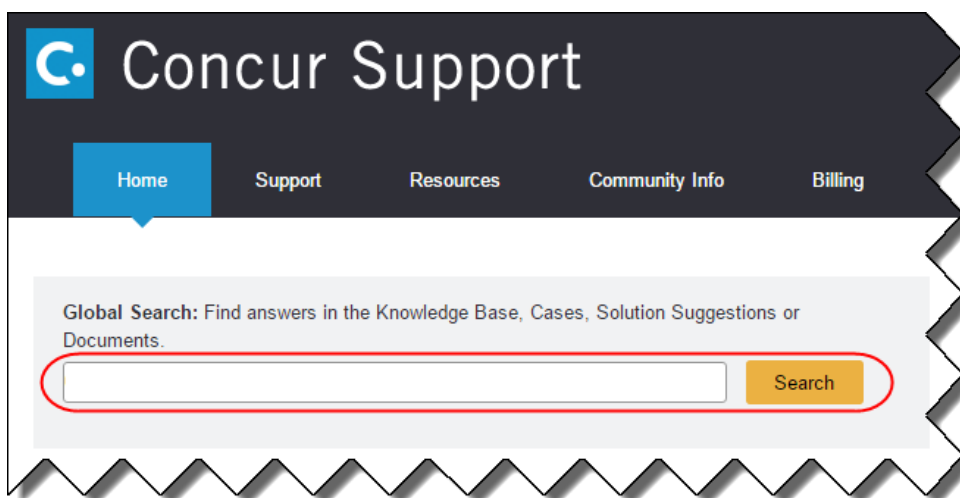
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
2. Click **Help > Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the Concur system internally. Please contact your internal support desk for assistance.

3. Enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

February Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
10141186	Forms and Fields The Expense entry form "Train" could not be found. <i>Concur corrected this issue in the code and now Train can be found in Forms and Fields.</i>

Concur Release Notes	
Expense Professional / Premium	
Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: March 17, 2018 Update #1: Tuesday, April 3, 4:30 PM PT	Client FINAL

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Release Notes

Accessibility

Alternative Text for the Logo on the Sign In Page

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Enhancing our products and services to better align to the accessible standards of WCAG 2.0 increases the ability of all Concur users.

What the User Sees

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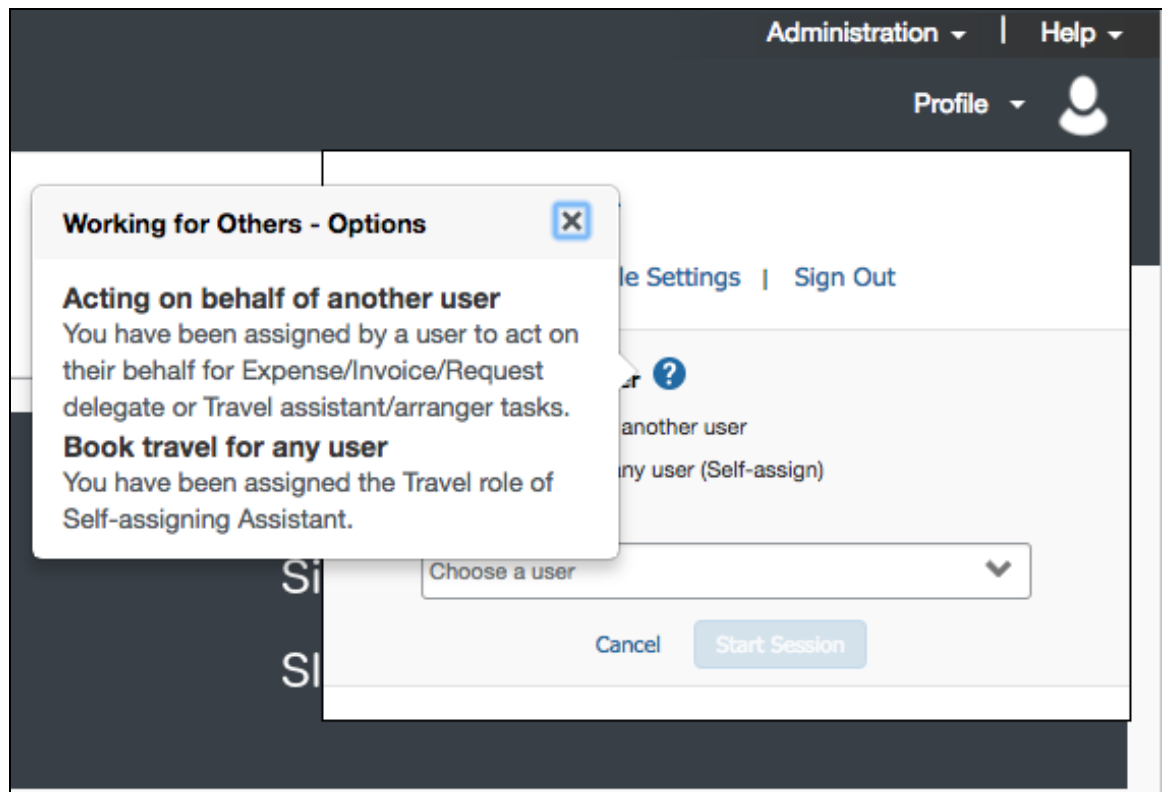
Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

Keyboard Access for Working for Others Quick Help

Overview

The **Working for Others** Quick Help contains important information and should be available to everyone. Currently, it is available only by clicking the "?" icon with a mouse. With this release, the **Working for Others** Quick Help will become accessible via the keyboard.



BUSINESS PURPOSE/CLIENT BENEFIT

Working for Others Quick Help will be available to mouse users and keyboard users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

All companies must take all reasonable steps to protect the personal and sensitive information of their employees. As per recommended security-related best practices, remember that custom fields should not contain personal and sensitive data.

! IMPORTANT: *Data in custom fields is not encrypted.* The client is solely responsible for any liability resulting or arising from improper use.

If your company is currently using custom fields to store personal or sensitive data (for example, Social Security numbers, family member names, or any other personally identifying information), you should plan to remove this information from your existing fields within the service and modify your current configuration.

Next Steps

For information about your configuration and the use of custom fields, contact Concur Client Support or your Account Manager.

Users by Browser Report Updated

Overview

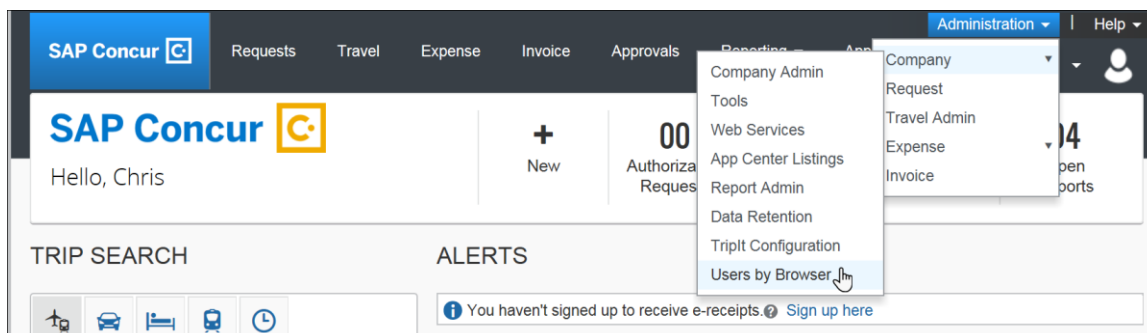
The Users by Browser report has been updated to include more information – all in one place. It now lists all users as well as their browsers and login count.

BUSINESS PURPOSE / CLIENT BENEFIT

The admin no longer has to generate a report for each browser. All users are listed on one report.

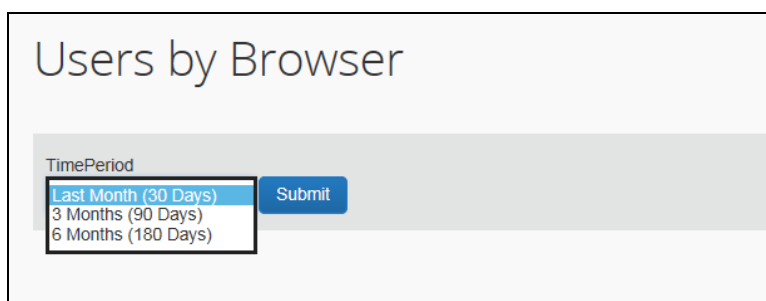
What the Admin Sees

To access the report, the admin clicks **Administration > Company > Users by Browser**.



The **Users by Browser** page appears.

The user selects the desired timeframe and clicks **Submit**.



The report is generated in CSV format.

	A	B	C	D	E	F	G	H	I
1	Login Name	Email	First Name	Last Name	Last Login Date (UTC)	IP Address	Browser	Login Count	
2	mp.com		Melissa		2/28/2018 8:03		Chrome64	4	
3	mp.com		Marta		2/28/2018 1:21		IE11.0	1	
4	amp.com		Danielle		2/28/2018 1:23		IE11.0	1	
5	otcamp.com		Greatest		2/28/2018 1:25		IE11.0	1	
6	otcamp.com		Jaime		2/28/2018 1:28		IE11.0	1	
7	bootcamp.com	camp.com	Randa		2/27/2018 15:52		Chrome64	36	
8	.com		Never		2/28/2018 15:34		Chrome64	8	
9	camp.com		Trainee		2/28/2018 1:19		IE11.0	2	
10	camp.com		Marta		2/28/2018 1:20		IE11.0	3	
11	mp.com	@gmail.com	Andreas		3/1/2018 7:51		IE11.0	14	
12	bootcamp.com	camp.com	Wisam		2/7/2018 14:33		Chrome64	5	
13	mp.com	com	Brian		3/1/2018 7:59		Edge15.15063	8	
14	otcamp.com		Paula		2/28/2018 1:28		IE11.0	1	

Configuration / Feature Activation

The enhancement occurs automatically; there are no additional configuration or activation steps.

Budget

New Budget Feature Generally Available March 19, 2018

This feature will be generally available March 19, 2018 in the US, Canada, Australia, New Zealand, Mexico, Brazil, and United Kingdom. The Budget feature is a purchased service.

Overview

The Budget feature enables clients to set up all components of a budget; a fiscal year to determine the budget period, budget tracking fields to track spending on a cost center (profit center) level, budget categories to group expense types for budget purposes and budgets, which are the actual annual budgets, and Budget Items, which define the budget including fiscal year, budget owner, budget name, and description.

This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense.

NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget feature share data between both calendars.

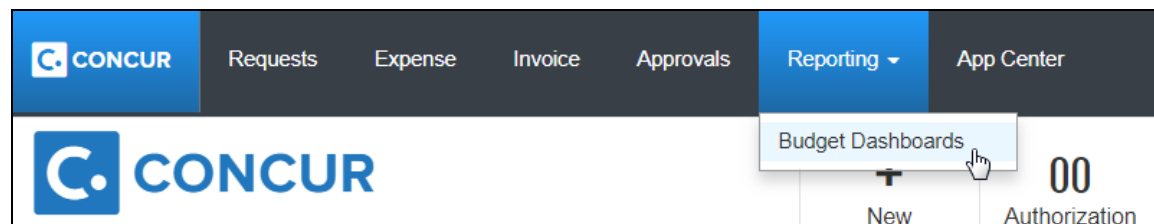
In addition, the Budget feature is available for the Concur mobile app for Expense. Please note that the release for the Concur mobile app occurs seven to ten days after the regular release.

BUSINESS PURPOSE/CLIENT BENEFIT

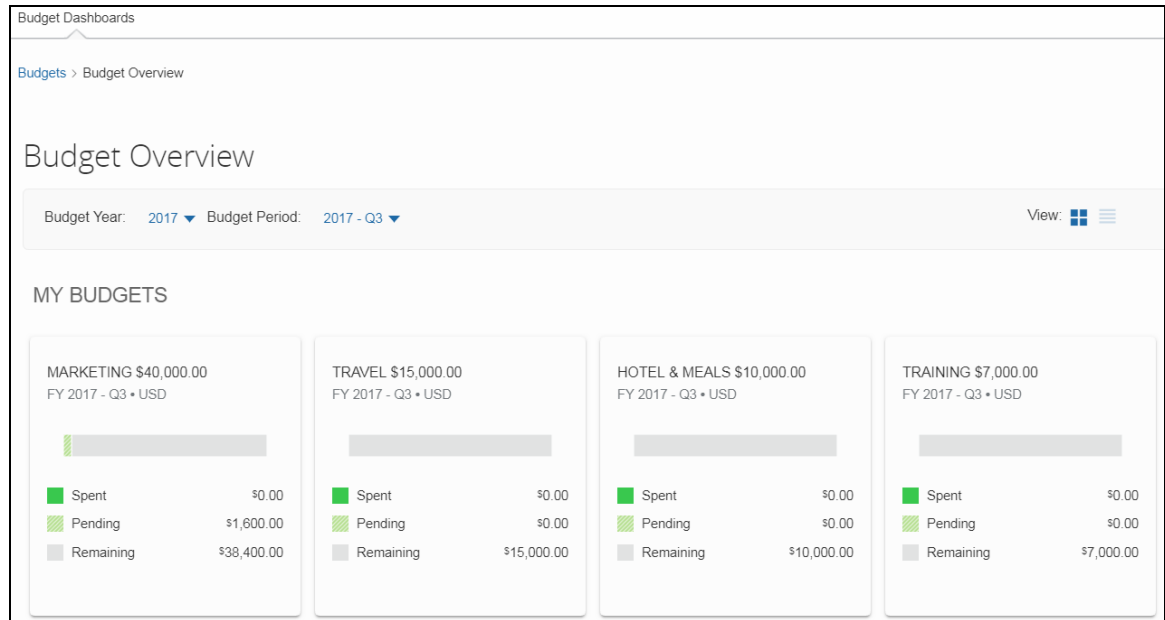
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

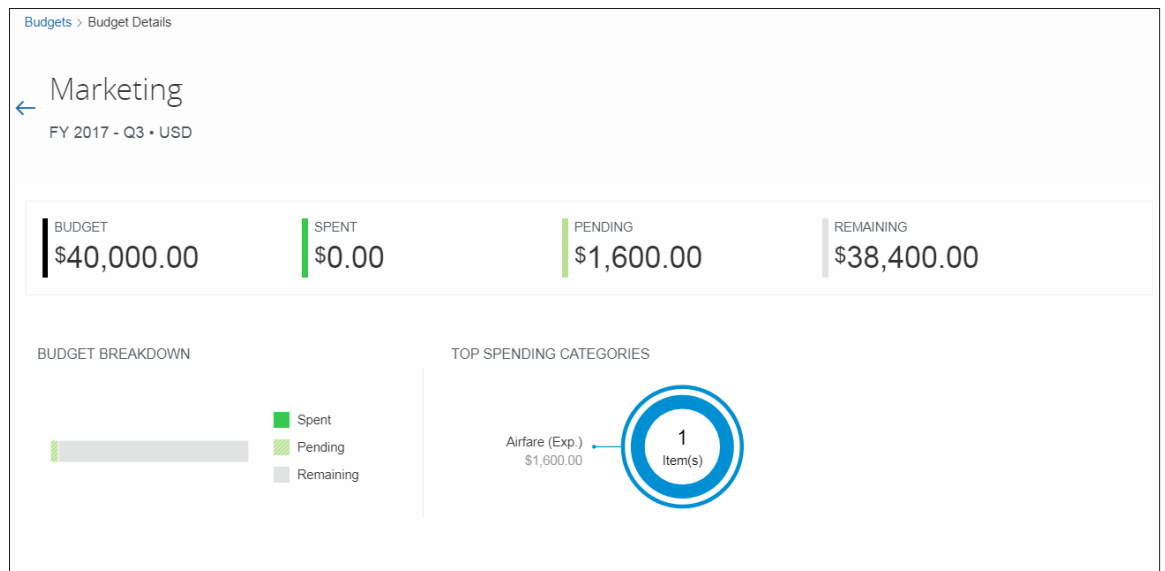
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.



Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



Clicking on one of the budget will show details about that budget.



PENDING						
Export Data Line Items Spending Categories						
Payment Request Purchase Request Expense						
Report Name	Transaction Date	Submitted By	Details	Expense Type	Budget Amount	% of Budget
11142017	11/14/2017	L. Claire	Staples, San Antonio, Texas	Office Supplies	\$67.50	0.16%
1						
SPENT						
Payment Request Purchase Request Expense						
Report Name	Transaction Date	Submitted By	Details	Expense Type	Budget Amount	% of Budget
12232017	12/23/2017	L. Ericka		Trade Shows	\$2,967.66	7.24%
12122017	12/22/2017	L. Yun	Beijiao, Guangdong	Cellular Phone	\$118.64	0.29%
12022017	12/2/2017	L. Joshie	Mitsui, Tokyo, Tokyo	Misc. Promotional Expense	\$149.77	0.37%

What the Admin Sees

The admin will see a new menu, **Budget Configuration**, in Expense Admin. The Budget Configuration page contains five tabs: **Budget Items**, **Fiscal Calendar**, **Budget Category**, **Budget Tracking Fields**, and **Budget Settings**.

NOTE: To access the **Budget Settings** tab, users need to have the Budget Administrator role.

CONCUR Requests Expense Invoice Approvals Reporting Administration Help						
Company Expense Invoice						
Invoice Processing Admin Budget Configuration						
Invoice Processing Admin Accounting Administration Audit Rules Budget Configuration Change Log Company Info Company Locations						
Budget Items Fiscal Calendar Budget Category Budget Tracking Fields Budget Settings						
New Modify Remove Import						
Budget Name	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency	
John01	2017	John Last	John's Budget	\$100,000.00	USD	
John02	2017	John Last	John's Team Budget	\$80,000.00	USD	
John03	2017	John Last	John's Team Trav...	\$40,000.00	USD	

Budget Items tab:

Budget Configuration

Budget Items Fiscal Calendar Budget Category Budget Tracking Fields Budget Settings

New Modify Remove Import

Budget Name ▲	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
Company01	2017	John Last	Company Travel ...	\$120,000.00	USD
Company02	2017	John Last	Company IT Budget	\$60,000.00	USD

Page 1 of 1 | Displaying 1 - 21 of 21

Fiscal Calendar tab:

Budget Configuration

Budget Items **Fiscal Calendar** Budget Category Budget Tracking Fields Budget Settings

New Modify Activate Deactivate Remove

☐ Fiscal Year	Start Date ▼	End Date	Active
☐ 2019	01/01/2019	12/31/2019	Yes
☐ 2018	01/01/2018	12/31/2018	Yes
☐ 2017	01/01/2017	12/31/2017	Yes

Budget Category tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[New](#)
[Modify](#)
[Remove](#)

Budget Category ▲	(Invoice) Expense Types	(Expense) Expense Types
IT	Software Cellular Telephone Telecommunication Equipment Internet Telecommunication Services Computing Equipment	Long Distance Local Phone Cellular Phone
Marketing	Marketing Trade Show	Misc. Promotional Expense Trade Shows
Travel	Travel Conference/Seminar Fees	Company Car Mileage Fixed Meals (gross) Limousine Company Car Wash Subway Company Car Oil Fixed Meals Room Tax Gas

< < | Page 1 of 1 | > > | ↺

Displaying 1 - 3 of 3

Budget Tracking Fields tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[Budget Fields](#)
[Budget Field Mapping](#)

[New Field](#)
[New Connected Field](#)
[Modify](#)
[Remove](#)
[Save Sequence](#)

☐ Budget Tracking Field	Field Type	List	Sequence ▲
☐ Department Function	Connected List	Function	↓
☐ Region Country	Connected List	Geography	↓ ↑
☐ Product Group Product	Connected List	Product	↓ ↑

Budget Settings tab:

Budget Configuration

Budget Items | Fiscal Calendar | Budget Category | Budget Tracking Fields | **Budget Settings**

Save Cancel

Time Zone:

Alert Limit Percent:

Control Limit Percent:

Send alert limit notifications: ☐

Send control limit notifications: ☐

Restrict notifications for past Budgets: ☐

Alternative Manager: ▼

Include Pending: ☐

Disable Budget Tracking Mapping Field Type filter: ☐

Enable Budget Capture for Expense: ☐

Enable Budget Capture for Purchase Request: ☐

Enable Budget Capture for Invoice: ☐

Configuration/Feature Activation

Concur needs to activate this features in a Concur internal-only tool.

Once Concur has activated the Budget feature, the Budget Administrator needs to configure the feature in the Budget Configuration tool in Expense Admin.



For more information, refer to the *Shared: Budget Setup Guide*, the *Shared: Budget Item Import User Guide*, the *Budget Client Fact Sheet*, and the *Budget FAQ*.

Expense Pay

Additional Card Programs Now Supported for EUR and USD

Overview

Expense Pay – Global for Expense Professional edition now supports the following credit card program for the Euro (EUR €):

- HSBC MasterCard EUR

Expense Pay – Global now supports the following credit card programs for the United States Dollar (USD \$):

- Capital One MasterCard USD
- PNC Bank Visa USD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

The screenshot shows the 'Add New Card Program' form. The 'Program Type' dropdown menu is highlighted with a red circle. The form includes the following fields and options:

- Program Name: Text input field.
- Payment Type: Dropdown menu.
- Program Type: Dropdown menu (highlighted with a red circle).
- Currency: Text input field.
- Active: Dropdown menu with 'Yes' selected.
- Classic: Checkbox.
- Global: Checkbox.
- Verify IIN: Link.
- Save: Button.
- Cancel: Button.

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

Consent Term Clarified from "Agree" to "Authorize"

Overview

For all users who opt-in to receive payments via Expense Pay, both Expense Pay – Global and classic Expense Pay, the term "agree" has been changed to "authorize" in the Concur User Interface (UI).

BUSINESS PURPOSE/CLIENT BENEFIT

This change provides greater legal clarity for the instruction that users authorize direct deposits from Concur for classic Expense Pay or a Concur payment-processing partner for Expense Pay - Global.

What the User Sees

EXPENSE PAY – CLASSIC

Users of Expense Pay – Classic will see this change in the UI:

- On the **Profile > Profile Settings > Bank Information** page, the button that read, "Save And Agree," now reads, "Save And Authorize."

The image displays two side-by-side screenshots of the 'Bank Information' form in the Concur User Interface. The left screenshot is labeled 'BEFORE' and the right is labeled 'AFTER'. Both forms contain the same fields: Bank Country (dropdown), Routing Number, Bank Name, Status, Personal Address Line 1, City, Bank Currency (dropdown), Bank Account Number, Re-Type Bank Account Number, Branch Location, Account Type (dropdown), Active (dropdown), Personal Address Line 2, State, and ZIP Code. The primary difference is the button at the bottom: 'Save And Agree' in the 'BEFORE' version and 'Save And Authorize' in the 'AFTER' version. Red arrows point from the 'BEFORE' button to the 'AFTER' button, highlighting the text change.

EXPENSE PAY – GLOBAL

Users of Expense Pay – Global will see these changes in the UI:

- On the **Profile > Profile Settings > Bank Information** page, the “Agree to the use requirement below” checkbox label now reads, “I authorize the use requirement below.”

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

Legacy Expense Authorization Request

Disabled Policy Setting for Legacy Expense Authorization Request

Overview

As preparation for the impending retirement of the legacy Expense Authorization Request feature, as part of the March 17, 2018 release, the ability to modify the setting to control creation of legacy Authorization Requests has been made read-only on the **Expense Policy** page.

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018. A client-facing FAQ is available:

http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

! **IMPORTANT:** Please also read the following release note: *Legacy Expense Authorization Request | Product Retirement March 31, 2018* in these March release notes.

WHAT THE EXPENSE ADMINISTRATOR SEES

With the March release, the field **Disable ability to create new Authorization Request** on the Expense Policy is modified to be read-only. This field and others pertaining to the settings for legacy Authorization Request are only shown when the company is using the legacy Authorization Request.

NOTE: The value in this field is not altered with the March 17, 2018 release, but will be selected (checked to prevent creation of new authorization requests) automatically on the retirement date, March 31, 2018.

The screenshot shows the 'Modify Policy: CA Expense Policy' interface. Under the 'General' tab, several configuration fields are visible: 'Name' (CA Expense Policy), 'Expense Report Form' (Default Report Information), 'Expense Report Workflow' (CES Standard Report Workflow), 'Authorization Request Header Form' (None), 'Authorization Request Workflow' (None), 'Authorization Request Active Days' (empty), 'Disable ability to create new Authorization Requests' (checkbox, currently unchecked and highlighted with a red circle), and 'Scan Configuration' (None).

Configuration

This change is applied automatically.

If a company using legacy Authorization Request has a need to create a new Expense policy after this change and before the retirement of the feature, the administrator may copy a policy with the desired value for this field. The copied policy will retain the value from the original policy, and can subsequently be edited to create the desired new policy.

Product Retirement March 31, 2018

! IMPORTANT: Please also read the following release note: *Disabled Policy Setting for Legacy Expense Authorization* in these March release notes.

Overview

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018.

Concur offered this feature to some clients prior to the existence of the standalone Concur Request product. We now have feature parity as well as enhanced features and full support on the standalone Request product. Clients that wish to leverage a request capability within Concur should purchase and migrate to the Concur Request product.

A client-facing FAQ is available: http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement allows Concur to focus development resources on further enhancements to our standalone Concur Request product whose functionality, innovation, and value now exceeds that of our legacy feature.

Configuration/Feature Activation

Concur has already initiated communication with clients who have recently used our legacy Expense Authorization Request feature to plan migrations to our standalone Concur Request product.

For this change, Concur has archived the *Expense: Authorization Requests Setup Guide* and *Expense: Authorization Requests User Guide*.

Next Generation (NextGen)

Expense User Interface

New User Interface for Concur Expense End Users

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **Preview Period:** The Preview Period begins March 17, 2018 and runs through September 2018. During this time, the new UI will be available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (until March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a

consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Travel Allowance

(Czech) Deductions on Government Rates

Overview

Before this change, when customers using both COMP and GOVT rates deducted meals, it has been discovered that the proper percentages set up in the **Calculation Properties** were being used for COMP rates, however they were not being used for the GOVT rates. The taxable/non-taxable calculation was not correct.

After this change, both COMP rates and GOVT rates are deducted as specified in the calculation property for partial days. The above limit (taxable amount) calculated is correct when calculation property **use_govt_meal_deduction_for_both_config** is enabled.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement provides correct calculations.

What the User Sees

If you enable this feature, employees will see a difference in calculated, above limit, taxable amounts.

What the Admin Sees

The **Calculation Properties** tab of the **Travel Allowance** page displays the new **Calculate GOVT Meals Deductions for BOTH CONFIG** option.

Travel Allowance

Configurations
Employee-Related Configurations
Rates
Configuration Sets
Itinerary Search
Calculation Properties

Calculation Method: Czech Rules ▼

Modify

Name	Label	Type	Value
meal_deduction_f_band_four_rate	Fourth Foreign Meal Deduction Rate (percent)	edit	25
meal_deduction_f_band_one_mi...	First Foreign Meal Deduction Time Band Minutes (integer between 0 a...	edit	60
meal_deduction_f_band_one_rate	First Foreign Meal Deduction Rate (percent)	edit	0
meal_deduction_f_band_three_...	Third Foreign Meal Deduction Time Band Minutes (integer between 0 a...	edit	1080
meal_deduction_f_band_three_rate	Third Foreign Meal Deduction Rate (percent)	edit	35
meal_deduction_f_band_two_mi...	Second Foreign Meal Deduction Time Band Minutes (integer between ...	edit	720
meal_deduction_f_band_two_rate	Second Foreign Meal Deduction Rate (percent)	edit	35
pocket_money_rate	Pocket Money Rate (percent)	edit	0
use_govt_meal_deduction_for_b...	Calculate GOVT Meals Deduction For BOTH CONFIG	checkb...	Y

Configuration/Feature Activation

Concur automatically added this setting to the **Calculation Properties** tab. To enable the option, perform the following steps.

NOTE: This new setting is on (Y) by default.

To disable this option:

1. Click **Administration** > **Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Travel Allowance** (left menu).
3. Click the **Calculation Properties** tab.
4. In the **Calculation Method** list, select *Czech Rules*.
5. Click **use_govt_meal_deduction_for_both_config**, and then click **Modify** to disable it.



For more information about Travel Allowance for Czechia, refer to the *Expense: Travel Allowance Configuration Guide - Czech*.

(Poland) New Setting for Optional Domestic Segments Merge

Overview

Currently, when the **use_24_hour_day_separation** enhancement is enabled, domestic segments from the first day of mixed travel and the immediate next day of mixed travel are merged.

In order to disable this domestic segment merge, a new calculation property has been introduced: **disable_domestic_merge_for_24_hour_day_separation**.

When this property is checked, the domestic merge will no longer take place.

This new setting applies to 24-hour day calculations and requires the **use_24_hour_day_separation** property to be enabled, to take effect.

BUSINESS PURPOSE/CLIENT BENEFIT

The new calculation property will give client Admins the option to disable the merge of the domestic segments of travel. Instead of the merge, these segments of travel will continue to be a part of the separate 24-hour day calculation logic.

What the User Sees

If you enable this setting for the travel allowance feature, employees will see a difference in total allowance calculation for mixed trips.

What the Admin Sees

The **Calculation Properties** tab of the **Travel Allowance** page displays the new **Disable Domestic Merge for 24Hr Day Separation Enhancement** option.

The screenshot shows the 'Travel Allowance' page with the 'Calculation Properties' tab selected. The 'Calculation Method' is set to 'Poland Rules'. A red arrow points to the 'Calculation Method' dropdown. Below the table, the 'disable_domestic_merge_for_24_hour_day_sep...' option is highlighted with a red box, showing its value as 'Y'.

Name	Label	Type	Value
disable_domestic_merge_for_24_hour_day_sep...	Disable domestic merge for the 24hr day separation enhancement.	checkbox	Y
domestic_combined_lunch_dinner_deduction_fa...	Domestic combined lunch and dinner factor	edit	50
domestic_extended_trip_factor	Domestic Extended Trip Factor (percent)	edit	100
domestic_extended_trip_factor_company	Domestic Extended Trip Company Factor (percent)	edit	100
domestic_extended_trip_limit	Domestic Extended Trip Days (integer)	edit	30
domestic_meals_percent	Low Meals Rate (percent)	edit	50
domestic_use_prorated_deductions	For Domestic Trips Use Prorated Deductions (Y/N)	checkbox	N
high_hours	High Hours (integer between 0 and 23)	edit	12
international_combined_lunch_dinner_deduction...	International combined lunch and dinner factor	edit	50
international_extended_trip_factor	International Extended Trip Factor (percent)	edit	100
international_extended_trip_factor_company	International Extended Trip Company Factor (percent)	edit	100
international_extended_trip_limit	International Extended Trip Days (integer)	edit	30
intl_high_meals_percent	International High Meals Rate (percent)	edit	50
intl_low_meals_rate	International Low Meals Rate (percent)	edit	33.3334
intl_use_prorated_deductions	For International Trips Use Prorated Deductions (Y/N)	edit	N
low_hours	Low Hours (integer between 0 and 23)	edit	8
use_24hour_day	Use 24 hour day	edit	Y
use_24_hour_day_separation	Use domestic and international trip separation for 24 hour day (Y/N)	edit	Y
use_combined_lunch_dinner_deduction_cap	Use combined lunch and dinner cap	edit	N

Configuration/Feature Activation

Concur automatically added this setting to the **Calculation Properties** tab. To enable the option, perform the following steps.

NOTE: This new setting is off (N) by default.

To enable this option:

1. Click **Administration > Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Travel Allowance** (left menu).
3. Click the **Calculation Properties** tab.
4. In the **Calculation Method** list, select *Poland Rules*.

5. Click **disable_domestic_merge_for_24_hour_day_separation**, and then click **Modify** to enable it.



For more information about Travel Allowance for Poland, refer to the *Expense: Travel Allowance Configuration Guide - Poland*.

Planned Changes

The items in this section are targeted for future releases. Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Accessibility

****Planned Changes** Remove All Instances of "ConcurAccessible"**

This release note has been removed but will be included for a future release.

Admin

****Planned Changes** Expense Assistant Can Create Trip-based Expenses Reports**

This release note has been removed but will be included for a future release.

****Planned Changes** Removing the "Privacy Agreement" Page**

Overview

For clients who currently display the **Privacy Agreement** page to users, be aware that on **April 14, 2018**, Concur will eliminate that page. That means, the privacy agreement will no longer display, under any circumstances. In addition, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

In a separate release, Concur will provide a standard privacy statement, which can be accessed via a link in the page footer.

This release note discusses the removal of the **Privacy Agreement** page and its associated configuration options. Information about the new Concur privacy statement will be provided in future release notes.

The intent of the change is to ensure that all customers see the same unmodified Concur privacy statement.

FAQs

Q. Why can't I continue using this feature?

A. Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within Concur services.

Q. When will the existing **Privacy Agreement** page be removed?

A. On April 14, 2018, the page will be removed; users will no longer see the privacy agreement – whether customized or generic.

Between now and April 14, if you want to remove your customized privacy agreement from the **Privacy Agreement** page, you can. For clients who have access to the custom text option or the privacy agreement settings, you can make those changes yourself. For clients who do not have access to the custom text option or the privacy agreement settings, you can contact Concur Client Support for assistance.

No action is necessary. You do not have to make changes now unless you want to.

Q. What will Concur provide in place of the current **Privacy Agreement** page?

A. Some clients have used the **Privacy Agreement** page to convey company-specific information to its users. That option will no longer be available. Instead, the Concur privacy statement – accessible via a link the page footer – will describe Concur’s processing activities of customer data.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Clients must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. When the new Concur privacy statement is implemented; will I be able to modify it or require that users accept it?

A. The Concur privacy statement will not be configurable by clients in any way. Its function is to describe Concur’s processing activities of client data.

Q. Who can I contact for more information?

A. You can contact Concur Client Support for additional information regarding these settings and/or Concur’s updated privacy statement.

Configuration / Feature Activation

The **Privacy Agreement** page and associated configuration options will be automatically removed. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

Company Card

**** Planned Changes ** Change to AMEX GL 1022 “No Vendor Supplied” Card Feed Data Handling**

Overview

In an upcoming release, clients moving to the GL-1022 American Express card feed can expect enhanced handling of the “American Express Initiated Activity” data to match that of the GL-1025 feed. With this upcoming change, data will yield values for **Merchant Name** and/or **Vendor Name** instead of returning a “No Vendor Supplied” message.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement updates the GL-1022 data reconciliation to match the behavior of the GL-1025 card feed, as requested by our Brazilian clients adopting the GL-1022 feed.

Preparing for This Change

Clients whose audit rule definitions will trigger based on the existing *Vendor Name = No Vendor Supplied* feed return value should review and, if necessary, update these configurations to match the new behavior of the GL-1022 card feed.

Configuration/Feature Activation

Concur will automatically implement this change.

Data Retention

****Planned Changes** New Feature for Outdated Data**

Overview

This new feature will allow clients to control how long Concur stores their data based on who, when, and where criteria.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

When this feature becomes available, and if it has been requested via Concur Client Support, then on the **Company Admin** page, the client admin will see a **Data Retention** link.

More information will be available in future versions of these Release Notes.



When this feature becomes available, for more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this feature becomes available, you may request that it be enabled for your company by contacting Concur Client Support.

In-Product Messaging

****Planned Changes** Opt Out of In-Product Messaging (United States)**

Overview

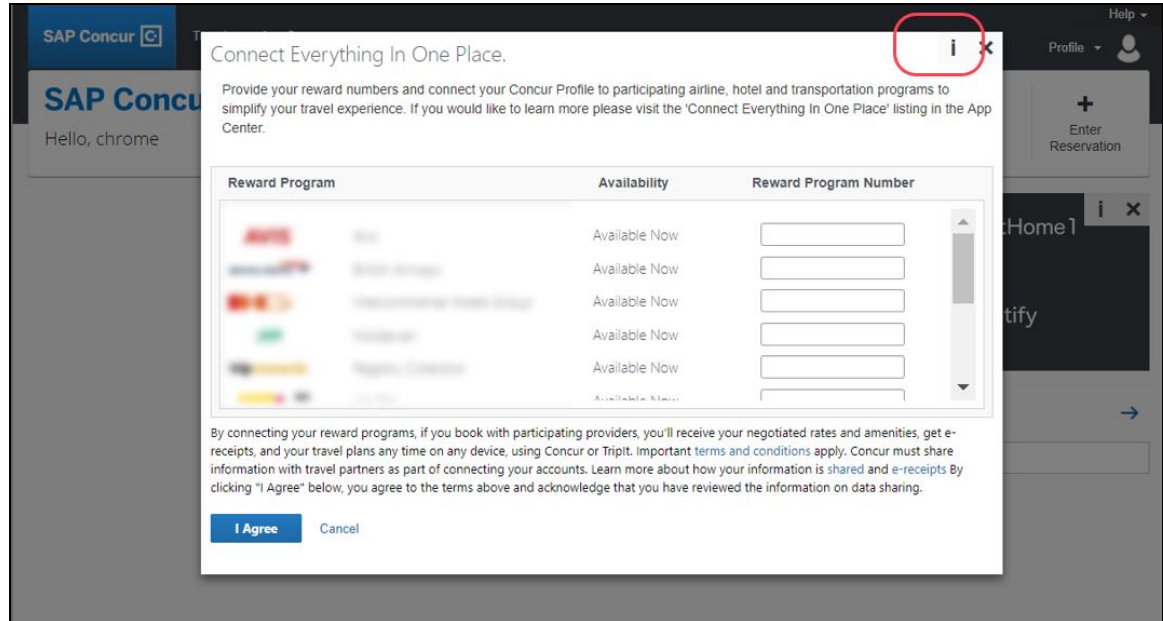
Last year, when in-product messaging was introduced in Europe, the feature included the ability for users to opt out of messaging.

In a future release, Concur will provide customers in the United States the ability to opt out.

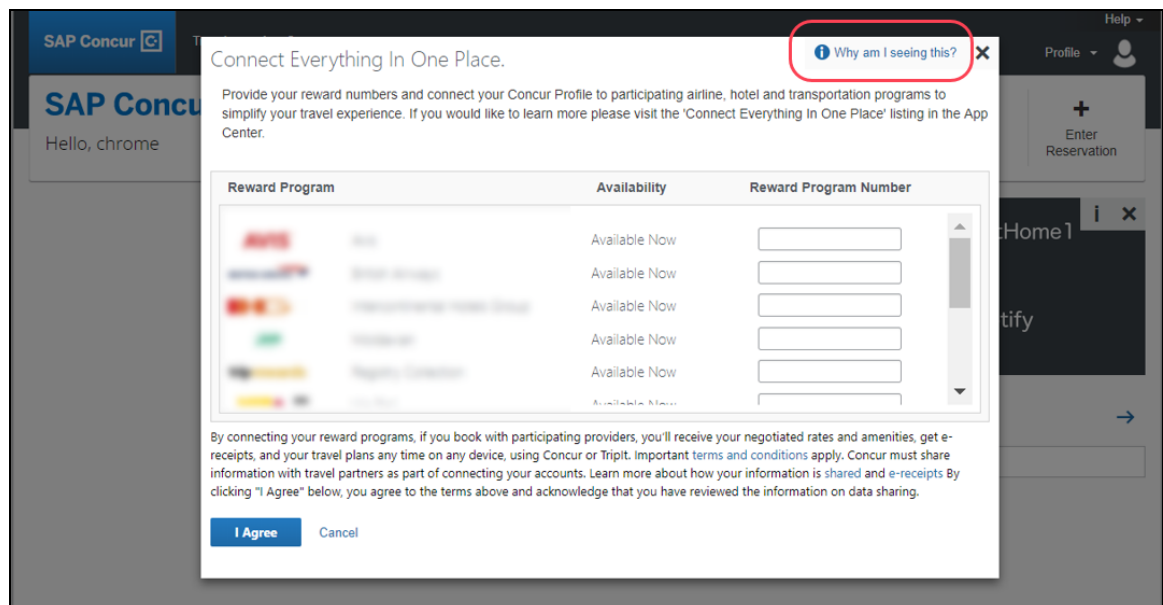
What the User Sees

MESSAGES

An information icon appears in the upper-right corner of the message.

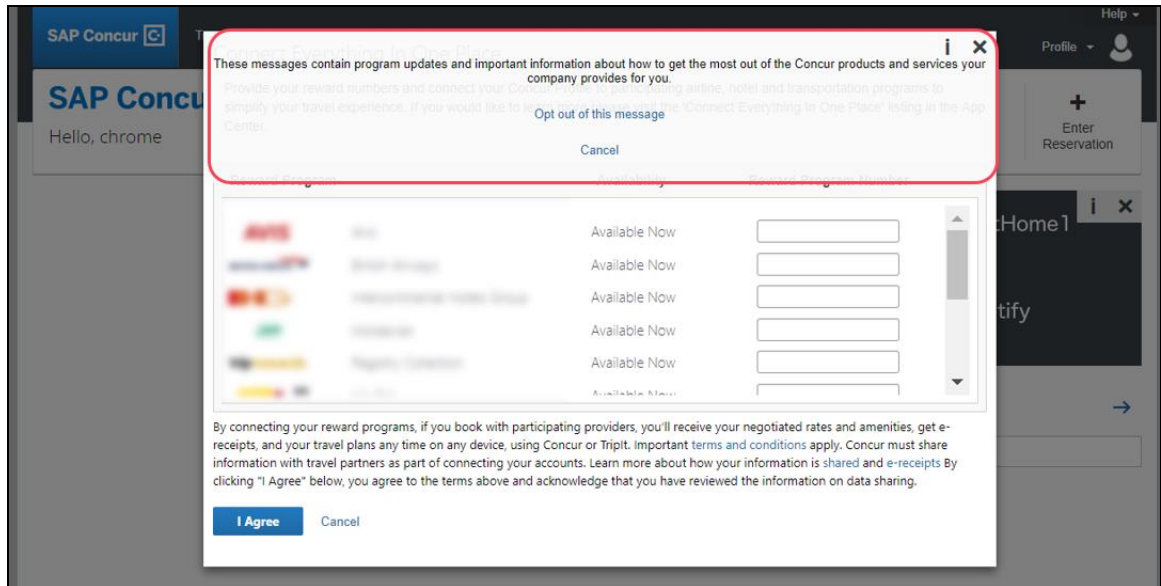


When the user clicks it or hovers the mouse pointer over it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to

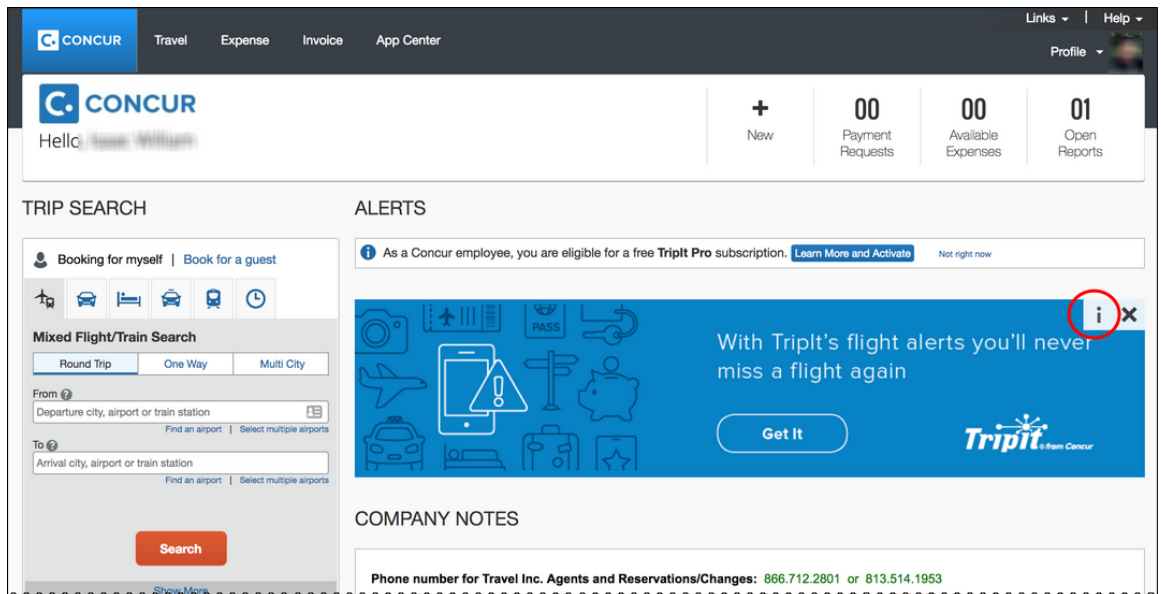
click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other categories.



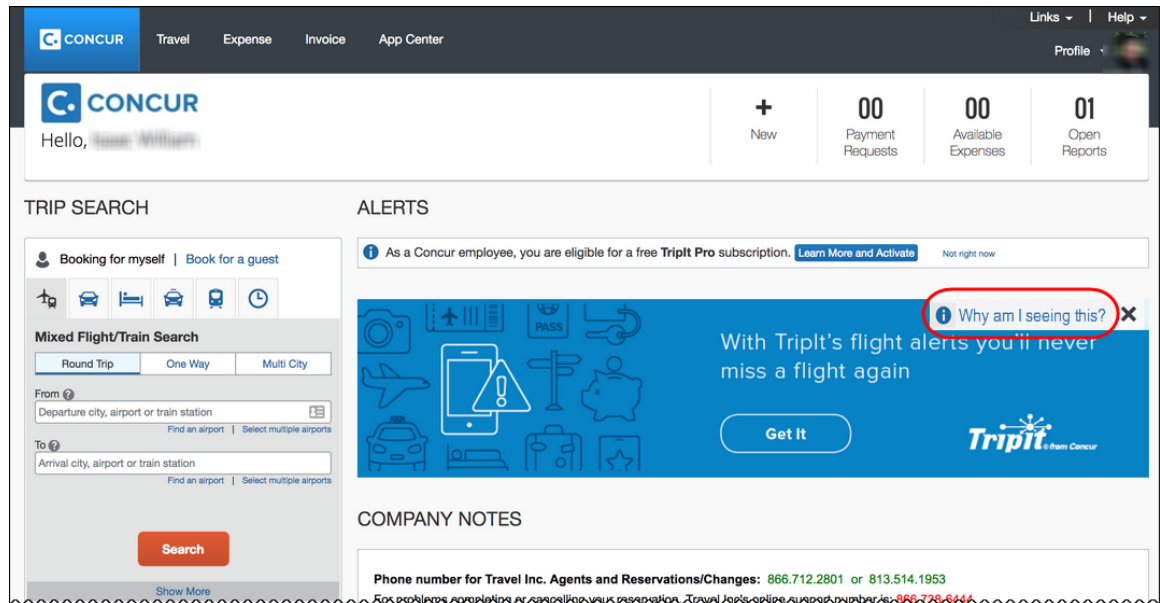
When the user clicks the close button (X in the upper-right corner), the window closes.

IN-PAGE MESSAGES

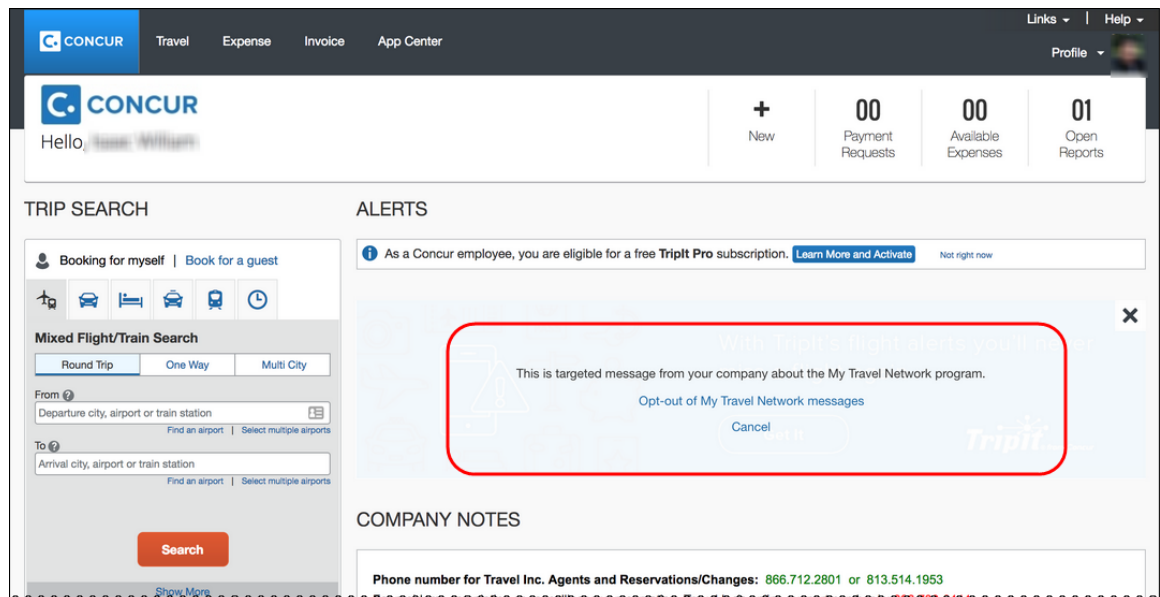
An information icon appears in the upper-right corner of the message.



When the user clicks it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this message as well as a link for the user to click to opt out of seeing similar messages in the future. The user could still be shown IPM relating to other categories.



When the user clicks the close button (X in the upper-right corner), the message collapses and is removed from the page entirely.

Configuration / Feature Activation

Concur will automatically implement this change; there will be no additional configuration or activation steps.

Japan Public Transport (JPT)

****Planned Changes** IC Card Readers Will Support Company-Level Authentication**

Overview

The IC Card Reader solution will switch authentication processes during the weekend of April 14th and 15th, 2018. The maintenance time will be provided in a future version of these release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

This change will simplify user activation and allow transactions to show more quickly in **Available Expenses**.

What the User Sees

Users should be aware of these three important changes.

1. During maintenance time, users will not be able to read and send IC Card transaction to Concur Expense.
2. After this change, the User Activation step will become unnecessary. This step is currently described in the *Expense: Japan Public Transportation User Guide*.

NOTE: This change will apply only for the users of the Pit Touch Pro2 IC Card Reader device. For Android Tablet type IC Card Reader device users, the user activation process will not change.

3. After this change, multiple not-yet-sent train transactions will reach to Concur and shown in **Available Expenses**. If the current authentication per user failed (i.e. token expired) and the user has not done re-activation with an activation email, train usage transactions retain a "not sent" status. Such not-yet-sent transactions will be sent by a daily automatic retry process after this change.

Configuration/Feature Activation

Concur will automatically implement these changes; there are no configuration or activation steps.

New Filter

****Planned Changes** New 23-Month Filter**

Overview

NOTE: This release note supersedes the January release note: *Available Expenses | **Planned Changes** New One-Year Filter*.

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View Transactions
- Unassigned Cash Advances

! IMPORTANT: Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Under View Transactions, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | **Planned Changes** New Feature for Outdated Data* release note included in this month's Planned Changes section of these Release Notes.

Plain Text File Transfer Protocol

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.

The screenshot displays the Concur Expense Administration Help interface. At the top, the navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The main header shows the Concur logo, a user greeting 'Hello, Terry', and summary statistics: 61 New Authorization Requests, 08 Purchase Requests, and 696 Payment Requests. A dropdown menu is open, showing various help topics, with 'Expense Administration Help' highlighted. Below this, the 'Resources for Administrators - Professional Edition' page is shown, featuring a sidebar with links like 'Using Online Help', 'Legal Notice', and 'Resources for Administrators - Professional Edition'. The main content area lists various resources, including 'What's New - Professional Edition', 'Client Fact Sheets', and 'User Interface Icons'. A second screenshot below shows the 'Expense Professional Administration Guides' page, which lists various guides such as 'Expense Setup Guides', 'Allocations', 'Attendees', 'Audit Rules', 'Audit Rules (Validation Rules)', 'Budget Insight', 'Car Configuration', and 'Cash Advance', each with a PDF icon.

Concur Expense Administration Help

Resources for Administrators - Professional Edition

Using Online Help

Legal Notice

[Resources for Administrators - Professional Edition](#)

Expense Professional Administration Guides

Budget Administration Guides

What's New - Professional Edition

► Release Note Admin Summaries (Translated, HTML Format) - Professional Edition

► Profile

You currently have no upcoming trips.

Concur Expense Administration Help

Expense Professional Administration Guides

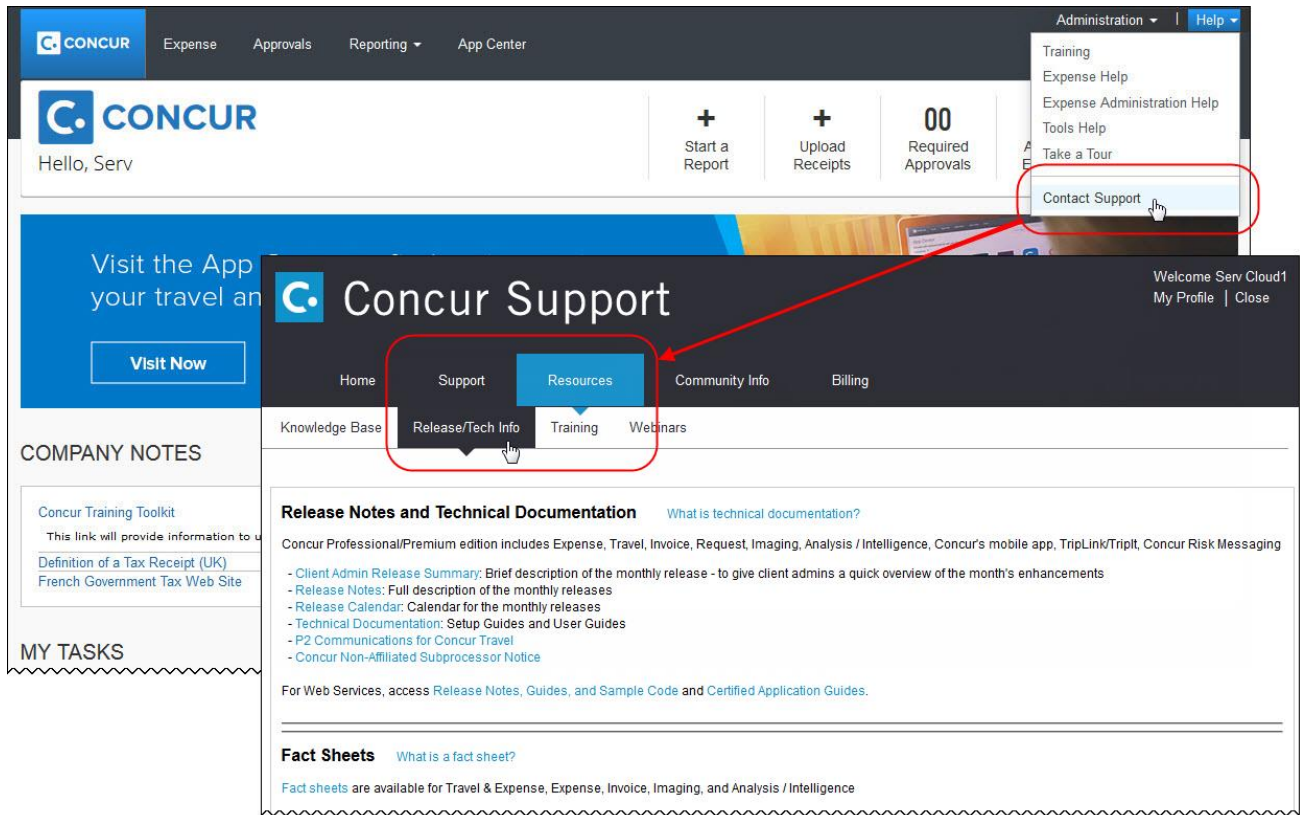
Expense Administration Guides (English only)

Expense Setup Guides (English Only)	Format (English Only)
Account Codes	PDF
Allocations	PDF
Attendees	PDF
Audit Rules	PDF
Audit Rules (Validation Rules)	PDF
Budget Insight	PDF
Car Configuration	PDF
Cash Advance	PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



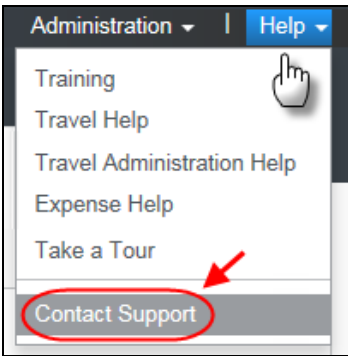
Cases

Steps for Getting a Status

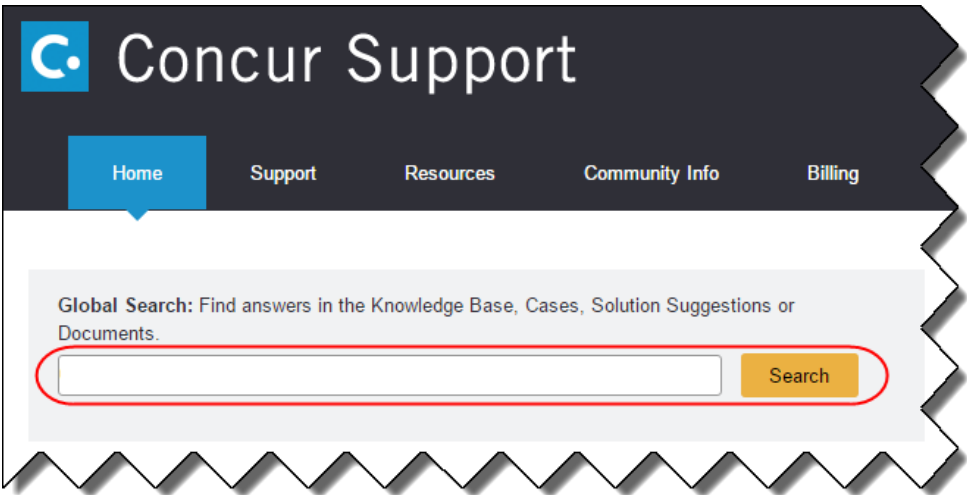
Each service release contains case resolutions.

► **How to check the status of a submitted case**

6. Log on to <https://concursolutions.com/portal.asp>.
7. Click **Help > Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the Concur system internally. Please contact your internal support desk for assistance.

- 8. Enter your **Case ID**.
- 9. Click **Search**. Search results are limited to each company's own cases.

March Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11271275	Expense Pay - Global An employee report repeatedly aborted with the message that the banking system had returned a payment demand. <i>Concur corrected this issue by increasing the number of allowable characters in the bank name field. The report now runs successfully.</i>

SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: April 14, 2018 Initial Post: Friday, April 13, 1:00 PM PT	Client FINAL

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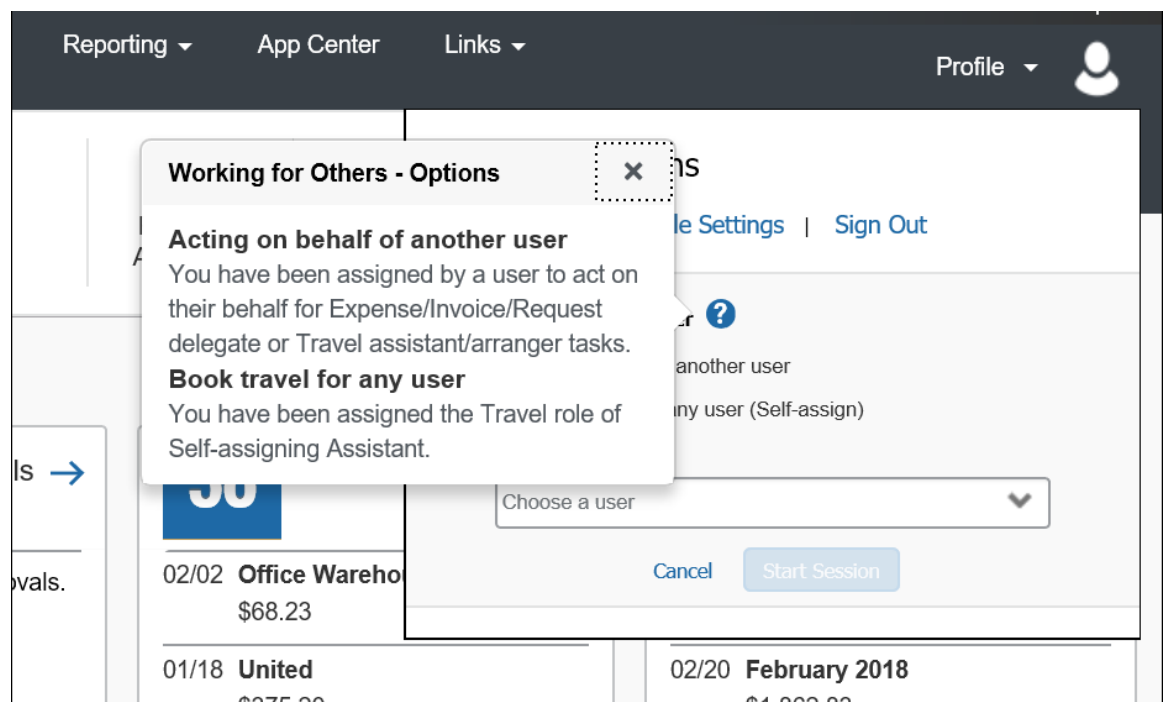
Release Notes

Accessibility

Clarification: Keyboard Access for Working for Others Quick Help

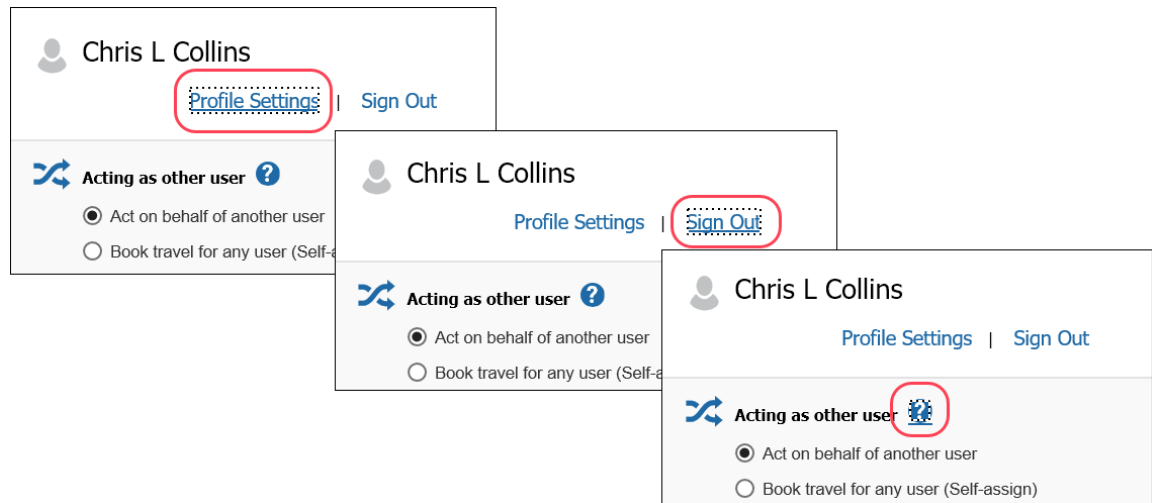
Overview

With the March release, SAP Concur announced that the **Working for Others** Quick Help became accessible via the keyboard.

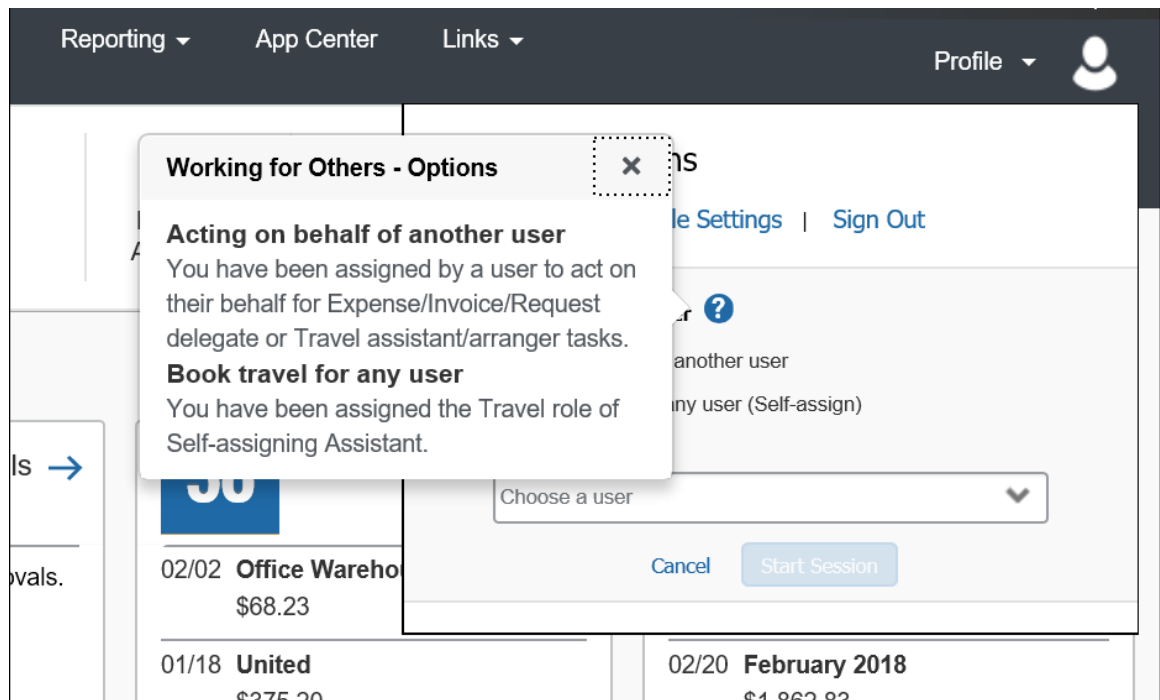


To clarify, that means a user can use the Tab key to access the icon and then the spacebar or Enter key to access the Quick Help information.

In this sample, the user tabs from **Profile Settings** to **Sign Out** to the  icon.



Once on the icon, the user presses the spacebar or the Enter key to access the Help text.



Configuration/Feature Activation

At the March release, the feature became available automatically; there are no additional configuration or activation steps.

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

All companies must take all reasonable steps to protect the personal and sensitive information of their employees. As per recommended security-related best practices, remember that custom fields should not contain personal and sensitive data.

⚠ IMPORTANT: Data in custom fields is not encrypted. The client is solely responsible for any liability resulting or arising from improper use.

If your company is currently using custom fields to store personal or sensitive data (for example, Social Security numbers, family member names, or any other personally identifying information), you should plan to remove this information from your existing fields within the service and modify your current configuration.

Next Steps

For information about your configuration and the use of custom fields, contact Concur Customer Support or your Account Manager.

Update: Users by Browser Report – North America Data Center Only

Overview

In the March release notes, we described the updates to the Users by Browser report.

	A	B	C	D	E	F	G	H	I
1	Login Name	Email	First Name	Last Name	Last Login Date (UTC)	IP Address	Browser	Login Count	
2	mp.com		Melissa		2/28/2018 8:03		Chrome64	4	
3	mp.com		Marta		2/28/2018 1:21		IE11.0	1	
4	amp.com		Danielle		2/28/2018 1:23		IE11.0	1	
5	ootcamp.com		Greatest		2/28/2018 1:25		IE11.0	1	
6	ootcamp.com		Jaime		2/28/2018 1:28		IE11.0	1	
7	ootcamp.com	camp.com	Randa		2/27/2018 15:52		Chrome64	36	
8	com		Never		2/28/2018 15:34		Chrome64	8	
9	camp.com		Trainee		2/28/2018 1:19		IE11.0	2	
10	camp.com		Marta		2/28/2018 1:20		IE11.0	3	
11	mp.com	@gmail.com	Andreas		3/1/2018 7:51		IE11.0	14	
12	bootcamp.com	camp.com	Wisam		2/7/2018 14:33		Chrome64	5	
13	mp.com	com	Brian		3/1/2018 7:59		Edge15.15063	8	
14	ootcamp.com		Paula		2/28/2018 1:28		IE11.0	1	

Be aware that the updated report is currently available **only** to customers using the North America data center. The report will be updated for customers in the remaining data centers in a future release.

Configuration / Feature Activation

This update occurred automatically in March for customers using the North America data center.

Audit Rules

New Custom Audit Rules Now Possible for Mileage via Concur's Mobile App

Overview

For clients who use the Concur Drive feature, SAP Concur now provides an enhanced ability to configure mileage-related audit rules for data expensed via this feature.

NOTE: Concur Drive refers to the feature that is enabled from **Concur's mobile app > Mileage > Auto Tracking**. To enable Concur Drive, contact Concur Customer Support.

With this release, two new fields are available: **Allow Maps** and **Route Source**. With these new fields, it is possible to configure custom audit rules for the following situations:

- **Drive Not Used:** When a user claims a Personal Car Mileage expense and they have not used Drive, they are forced to enter a comment.
- **Drive Policy Reminder:** When a user has not used Drive, they are reminded by a warning exception message.
- **Mileage Route Required:** When a user does not have a mapped route, they are presented with an exception instructing them to add a route.

BUSINESS PURPOSE/CLIENT BENEFIT

These new data fields give admins greater visibility into and control over how mileage is expensed by their users.

What the Admin Sees

New fields are available on the **Audit Rules** page for use with Concur Drive.

Name	Event	Exception Code	Editable By	Applies To	Active
Airfare Limit	Entry Save	CESVARN	Global	Global	No
Airfare Payment Method	Entry Save	CESPAY	Global	Global	No
Airfare Preferred Vendor	Entry Save	CESPREF	Global	Global	No
Amount Due Employee	Report Submit	CESVARN	Global	Global	No
Bank Account Currency Check	Report Submit	NOTBACRN	Global	Global	Yes
Breakfast Limit	Entry Save	CESINFO	Global	Global	No
Business Meal Limit	Entry Save	CESVARN	Global	Global	No
Car Rental Limit	Entry Save	CESVARN	Global	Global	No
Car Rental Payment Method	Entry Save	CESPAY	Global	Global	No

ALLOW MAPS FIELD

Select Field

Select a field from the list. The fields that appear pertain to the Data Object you selected.

- Airline Fee Type Code
- Allow Maps**
- Amount
- Amount-Daily Total
- Amount-Daily Total (multiple expense types)
- Amount-Monthly Total
- Amount-Monthly Total (multiple expense types)
- Amount-Weekly Total
- Amount-Weekly Total (multiple expense types)
- Amount-Yearly Total
- Amount-Yearly Total (multiple expense types)
- Approved Amount
- Arrival Date (Hotel E-Receipt)
- Average Cost Per Attendee
- Average Cost Per Attendee (attendee count plus 1)

Conditions

1 Audit Rule 2 Conditions 3 Exception

Insert Remove

Value Personal Car Mileage

And Or

Entry Route Source

Equal

Value None

And Or

Entry Allow Maps

Value

Cancel <<Previous Next>>

ROUTE SOURCE FIELD

Audit Rules

Custom
Random
Validation

1 Audit Rule
2 Conditions
3 Exception

Insert
Remove

Data Object/Operator	Field/Value	Operation
☐	Entry Expense Type	
☐	Value Personal Car Mileage	
☒ And ☐ Or		
☐	Entry Route Source	
☐	Value	

Return Date (Car Rental E-Receipt)
Round Trip Deduction
Route Source
Segment Type Key
Source
Source/Type Classification
Start Date (Booked)
State/Province
Tax Source
Ticket Number
Ticket Number Mismatch
Total Days (Booked)
Total Invoice Amount (Hotel E-Receipt)
Total Reclaim Adjusted Amount
Total Reclaim Posted Amount
Total Tax Adjusted Amount
Total Tax Posted Amount
Transaction Date
Transaction Type
Transaction-Daily Total (multiple expense types)
Transaction-Monthly Total (multiple expense types)
Transaction-Weekly Total (multiple expense types)

Cancel
<<Previous
Next>>

Configuration/Feature Activation

These fields are automatically available; there are no additional configuration or activation steps.



For more information, refer to the *Expense: Audit Rules Setup Guide*.

Budget

Budget Release Notes

Overview

Clients can view new budget functionality and enhancements in the new Budget Release Notes which are located on the same page as the other product release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Concur's Platform

Callout Server Requirements Update - Upgrade Postponed

SAP Concur has postponed the previously scheduled maintenance (Monday, April 16 at 10 am PST) of the servers that support the Concur Platform Callouts.

More information will be available in future Release Notes.

Expense Pay – Global

Additional Card Programs Now Supported for CAD

Overview

Expense Pay – Global for Expense now supports the following credit card program for the Canadian Dollar (CAD \$):

- Bank of America MasterCard CAD
- Bank of America Visa CAD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

The screenshot shows the 'Add New Card Program' form with the following fields and options:

- Program Name:** A text input field.
- Payment Type:** A dropdown menu.
- Program Type:** A dropdown menu, highlighted with a red oval. To its right is a [Verify IIN](#) link.
- Currency:** A text input field.
- Active:** A dropdown menu with 'Yes' selected.
- Classic:** An unchecked checkbox.
- Global:** An unchecked checkbox.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

In-Product Messaging (IMP)**Opt Out of In-Product Messaging (United States)****Overview**

Last year, when in-product messaging was introduced in Europe, the feature included the ability for users to opt out of messaging.

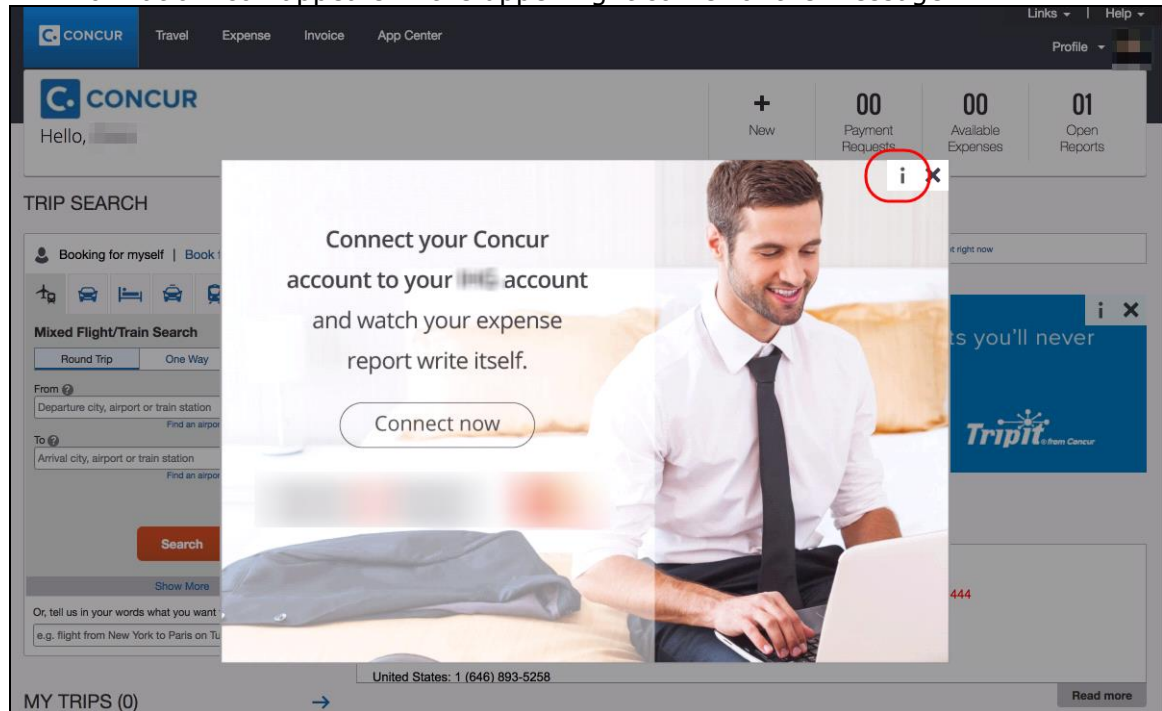
With this release, SAP Concur will provide customers in the United States the ability to opt out.

BUSINESS PURPOSE / CLIENT BENEFIT

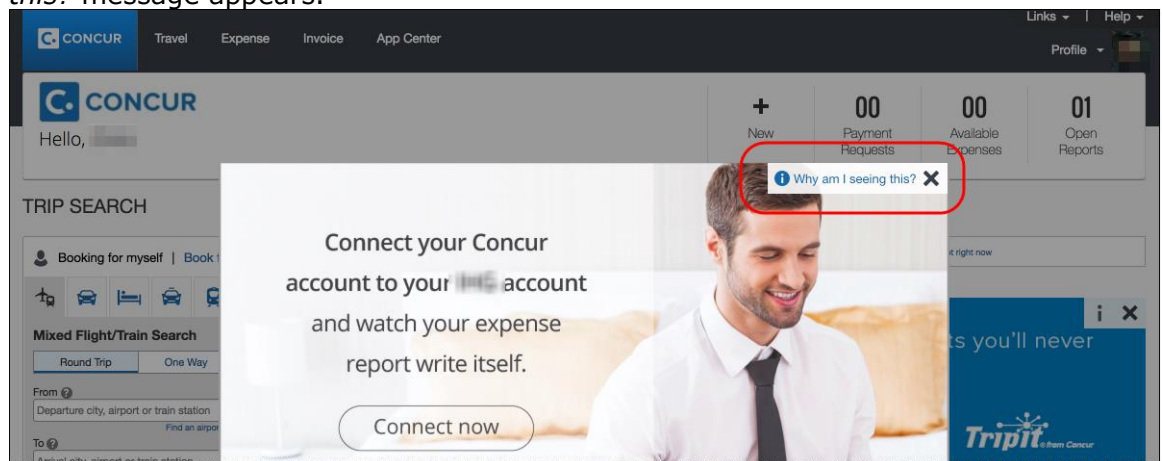
Users in the United States can opt out of in-product messaging.

What the User Sees**POPUP MESSAGES**

An information icon appears in the upper-right corner of the message.

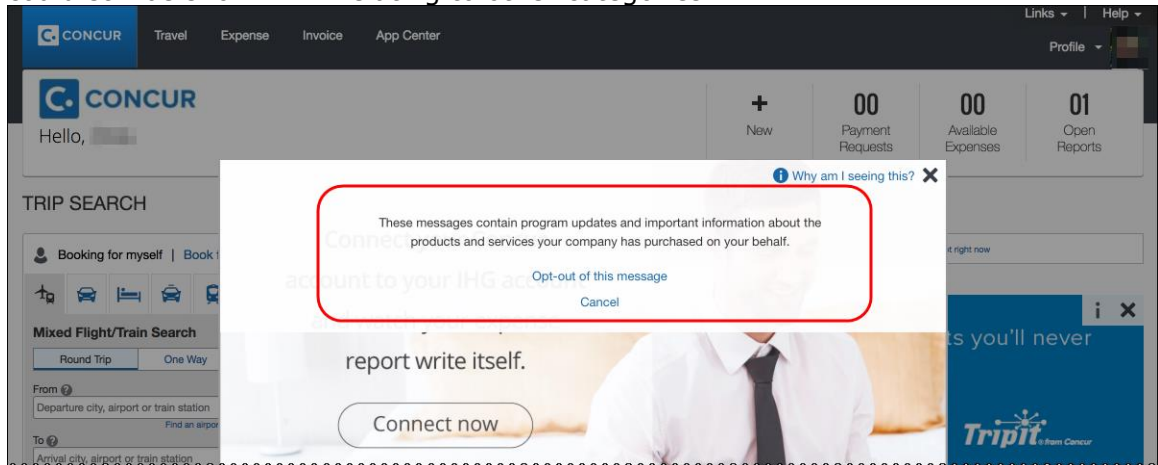


When the user clicks it or hovers the mouse pointer over it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user

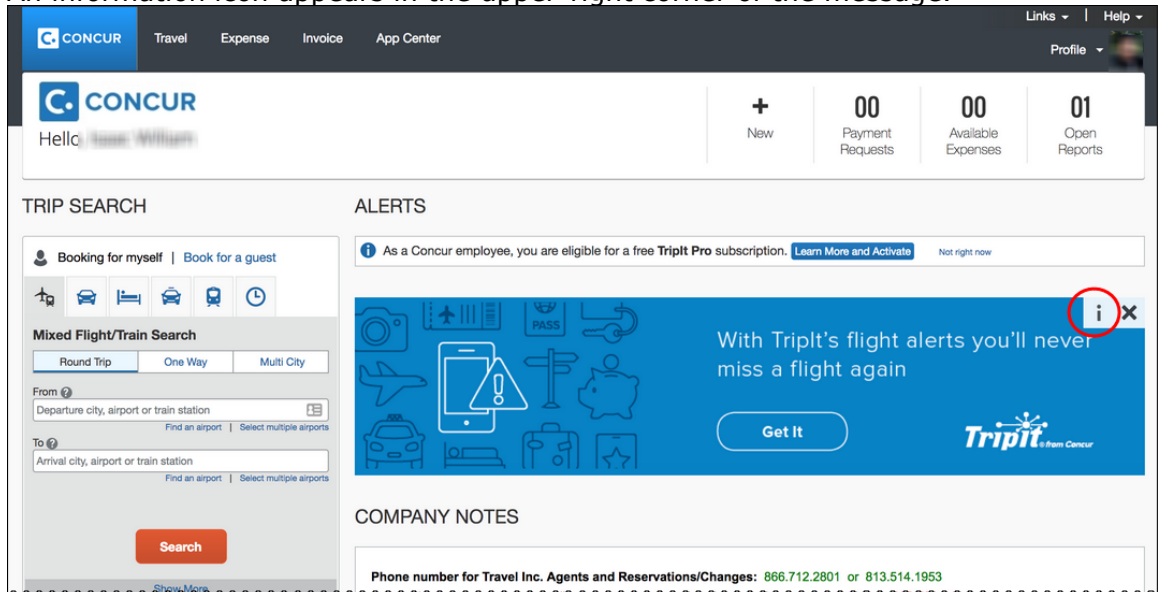
could still be shown IMP relating to other categories.



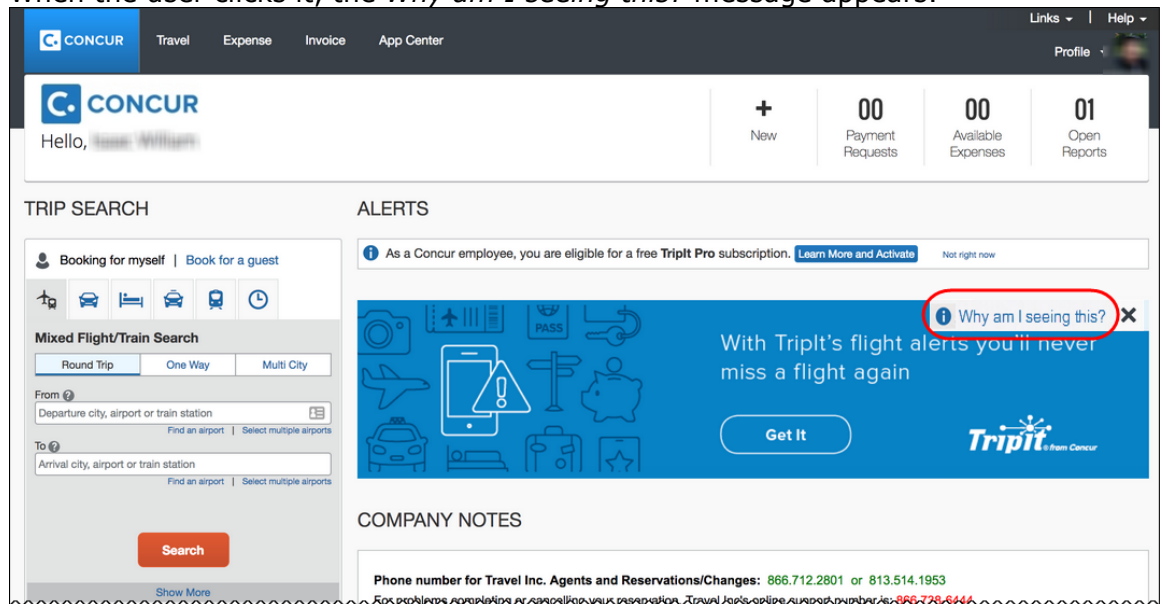
When the user clicks the close button (X in the upper-right corner), the popup closes.

IN-PAGE MESSAGES

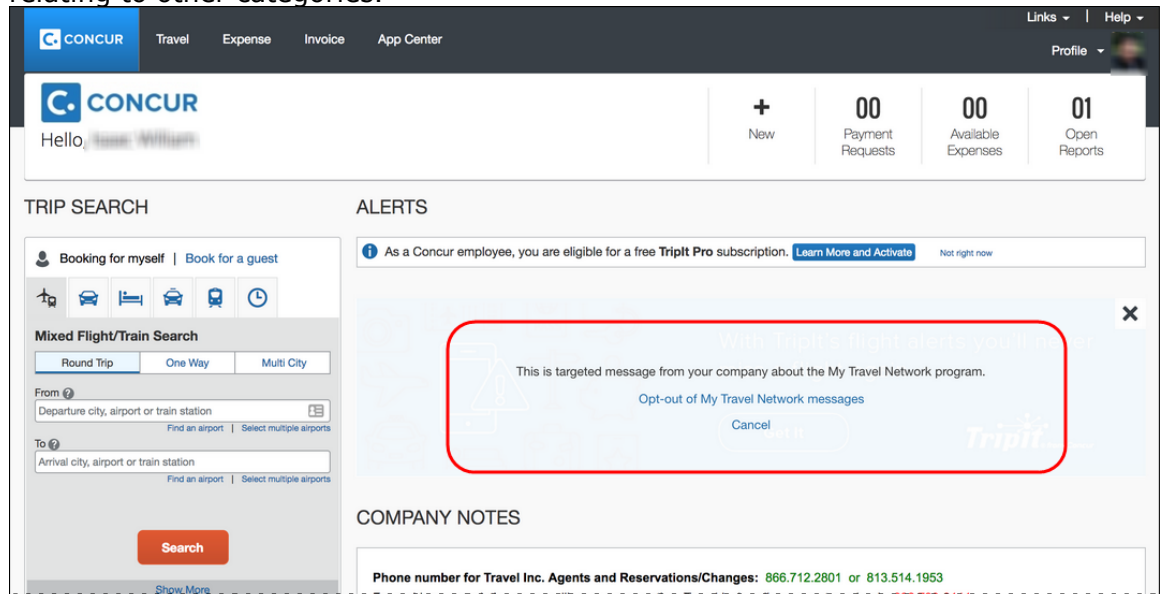
An information icon appears in the upper-right corner of the message.



When the user clicks it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this message as well as a link for the user to click to opt out of seeing similar messages in the future. The user could still be shown IPM relating to other categories.



When the user clicks the close button (X in the upper-right corner), the message collapses and is removed from the page entirely.

Configuration / Feature Activation

The change will occur automatically. There are no additional configuration or activation steps.

Japan Public Transport (JPT)

IC Card Readers Will Support Company-Level Authentication

Overview

The IC Card Reader solution will switch authentication processes during the weekend of April 14th and 15th, 2018.

The scheduled maintenance times are as follows:

- Saturday, April 14th, 2018 from 10:00 am to 2:00 pm Japan Time (Friday, April 13th, 2018 from 6:00 pm to 10:00 pm PDT)
- Sunday, April 15th, 2018 from 1:00 pm to 4:00 pm Japan Time (Saturday April 14th, 2018 from 8:00 pm to 0:00 am PDT)

BUSINESS PURPOSE/CLIENT BENEFIT

This change will simplify user activation and allow transactions to show more quickly in **Available Expenses**.

What the User Sees

Users should be aware of these three important changes.

1. During maintenance time, users will not be able to read and send IC Card transaction to Concur Expense.
2. After this change, the User Activation step will become unnecessary. This step is currently described in the *Expense: Japan Public Transportation User Guide*.

NOTE: This change will apply only for the users of the Pit Touch Pro2 IC Card Reader device. For Android Tablet type IC Card Reader device users, the user activation process will not change.

3. After this change, multiple not-yet-sent train transactions will reach Concur and show in **Available Expenses**. If the current authentication per user failed (i.e. token expired) and the user has not done re-activation with an activation email, train usage transactions retain a "not sent" status. Such not-yet-sent transactions will be sent by a daily automatic retry process after this change.

Configuration/Feature Activation

Concur will automatically implement these changes; there are no configuration or activation steps.

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

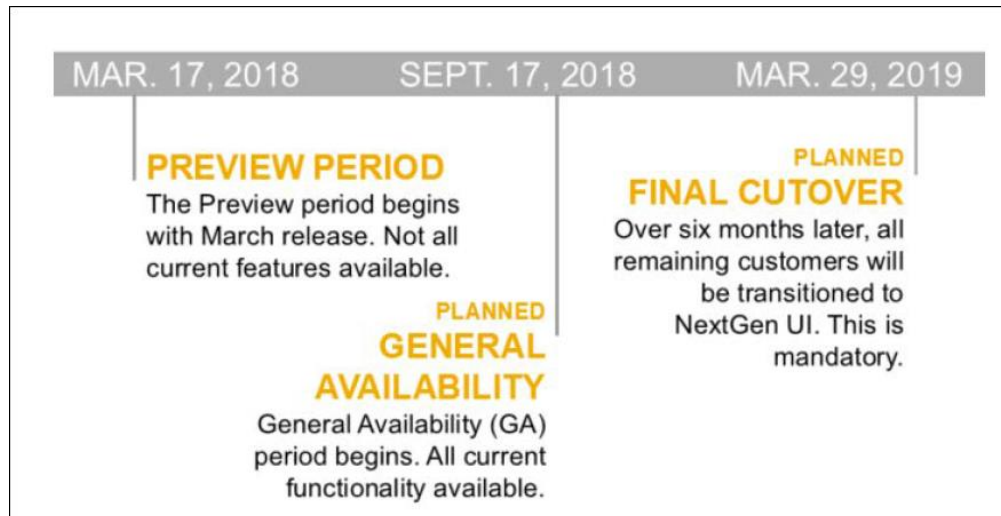
****Ongoing** New User Interface for Concur Expense End Users**

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.



BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Travel Allowance

(Czech Republic) Meal Allowance Updates

Overview

A change has been made to the meal allowance rates for foreign travel. If the foreign location duration for the day is more than 18 hours, the employee is entitled to 100% of the allowance for the foreign location. Prior to this change, 18 hours was required for this allowance, but now the stay must be more than 18 hours to receive this allowance.

BUSINESS PURPOSE/CLIENT BENEFIT

This change maintains correct calculations.

Configuration/Feature Activation

The update is automatically available; there are no additional configuration or activation steps.



For more information, refer to the *Travel Allowance Configuration Guide – Czech Republic*.

(Finland) Location Updates

Overview

Updates have been made to the rules for determining the travel allowance location. The following rules no longer apply:

- Allowance location is based on the last international location visited if there is a minimum of 10 hours of international travel in a 24-hour day.
- If the international time spent does not meet the minimum of 10 hours, the domestic allowance rate is used.

For both the above scenarios, day ending in transit departing from a foreign location is also considered.

BUSINESS PURPOSE/CLIENT BENEFIT

This change maintains correct calculations.

Configuration/Feature Activation

The update is automatically available; there are no additional configuration or activation steps.



For more information, refer to the *Travel Allowance Configuration Guide – Finland*.

(Poland) Option "Use Border Cross Time" is Now Available

Overview

The country-specific option, **User Border Cross Time**, is now available for the Travel Allowance Poland feature.

BUSINESS PURPOSE/CLIENT BENEFIT

This change provides greater functionality for users of the Travel Allowance Poland feature.

Configuration/Feature Activation

The update is automatically available; there are no additional configuration or activation steps.



For more information, refer to the *Travel Allowance Configuration Guide – Poland*.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expense Reports**

More information will be available in future Release Notes.

****Planned Changes** Removing the "Privacy Agreement" Page**

Overview

For customers who currently display the **Privacy Agreement** page to users, be aware that – targeted for May – SAP Concur will eliminate that page. That means, the privacy agreement will no longer display, under any circumstances. In addition, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

In a separate release, SAP Concur will provide a standard privacy statement, which can be accessed via a link in the page footer.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur privacy statement.

FAQs

Q. Why can't I continue using this feature?

A. SAP Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within SAP Concur services.

Q. When will the existing **Privacy Agreement** page be removed?

A. Targeted for May, the page will be removed; users will no longer see the privacy agreement – whether customized or generic.

Between now and May, if you want to remove your customized privacy agreement from the **Privacy Agreement** page, you can. For customers who have access to the custom text option or the privacy agreement settings, you can make those changes yourself. For customers who do not have access to

the custom text option or the privacy agreement settings, you can contact Concur Customer Support for assistance.

No action is necessary. You do not have to make changes now unless you want to.

Q. What will SAP Concur provide in place of the current **Privacy Agreement** page?

A. Some customers have used the **Privacy Agreement** page to convey company-specific information to its users. That option will no longer be available. Instead, the SAP Concur privacy statement – accessible via a link the page footer – will describe SAP Concur's processing activities of customer data.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Customers must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. When the new SAP Concur privacy statement is implemented, will I be able to modify it or require that users accept it?

A. The SAP Concur privacy statement will not be configurable by customers in any way. Its function is to describe SAP Concur's processing activities of customer data.

Q. Who can I contact for more information?

A. You can contact Concur Customer Support for additional information regarding these settings and/or Concur's updated privacy statement.

Configuration / Feature Activation

The **Privacy Agreement** page and associated configuration options will be automatically removed. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

****Planned Changes** New Privacy Statement Planned for May Release**

Overview

In the release note named ***Planned Changes** Removing the "Privacy Agreement" Page*, we describe changes that will occur when the current customizable privacy policy is discontinued. We also discuss the new Privacy Statement that SAP Concur will provide as a requirement of being a "processor" of customer data.

NOTE: Be aware that the term "processor" here is **not** at all related to the Processor roles found in most SAP Concur products.

The intent is to replace all occurrences of customized or unique policy text – ***in all SAP Concur products and the mobile app*** – with the SAP Concur Processor Privacy Statement, which describes our processing activities of customer data.

Be aware that the new text will be available soon, targeted for May.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur privacy statement.

Configuration / Feature Activation

The change will occur automatically; there are no additional configuration or activation steps.

Company Card

**** Planned Changes ** Addition of Income and Transfer Transaction Categories to Yodlee**

Overview

In an upcoming release, users of Yodlee will be able to work with transaction data from the **Income** and **Transfer** categories. Currently, transactions falling into either of these categories are set as undefined and hidden by the system. With the upcoming change, these transactions will now be correctly categorized for the client.

Please note that this feature enhancement will still filter out transactions categorized as payment or account settlement because they are not expense-report related. As the integration is based on an individual registration, the end user would delete what is not eligible to expense report reimbursement.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement extends the scope of what flows into Concur allowing clients to process their card transactions by bringing support for the missing **Income** and **Transfer** categories to the Expense product.

Configuration/Feature Activation

This new mapping is not configurable and will be automatically available to all clients; there are no activation steps.

Data Retention

****Planned Changes** New Feature for Outdated Data**

Overview

This new feature will allow clients to control how long Concur stores their data based on who, when, and where criteria.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

When this feature becomes available, and if it has been requested via Concur Customer Support, then on the **Company Admin** page, the client admin will see a **Data Retention** link.

More information will be available in future versions of these Release Notes.



When this feature becomes available, for more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this feature becomes available, you may request that it be enabled for your company by contacting Concur Customer Support.

New Filter

****Planned Changes** New 23-Month Filter**

Overview

NOTE: This release note supersedes the January release note: *Available Expenses | **Planned Changes** New One-Year Filter*.

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View Transactions
- Unassigned Cash Advances

 **IMPORTANT:** Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Under View Transactions, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | **Planned Changes** New Feature for Outdated Data* release note included in this month's Planned Changes section of these Release Notes.

Plain Text File Transfer Protocol

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

SAP Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

The screenshot illustrates the Concur Expense Administration Help interface. At the top, the navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The main header displays the Concur logo, a user greeting 'Hello, Terry', and summary statistics: 61 New Authorization Requests, 08 Purchase Requests, and 696 Payment Requests. A 'Help' dropdown menu is open, listing various help topics, with 'Expense Administration Help' highlighted. Below this, the 'Resources for Administrators - Professional Edition' page is shown, featuring a sidebar with links like 'Using Online Help', 'Legal Notice', and 'Resources for Administrators - Professional Edition' (highlighted). The main content area lists various resources, including 'What's New - Professional Edition', 'Client Fact Sheets', and 'User Interface Icons'. A second screenshot below shows the 'Expense Professional Administration Guides' page, with a sidebar highlighting 'Expense Professional Administration Guides' and a main content area displaying a table of guides.

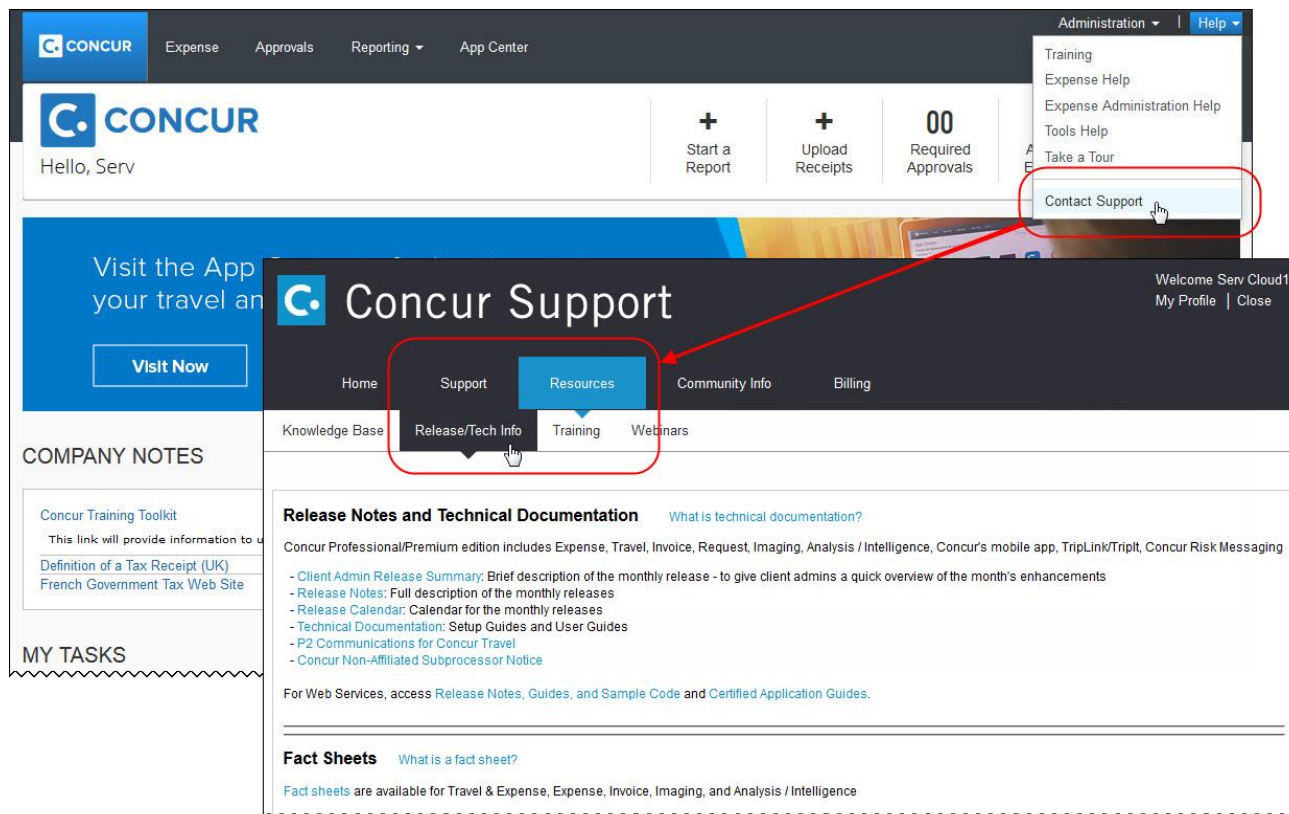
Expense Setup Guides (English Only)	Format (English Only)
Account Codes	PDF
Allocations	PDF
Attendees	PDF
Audit Rules	PDF
Audit Rules (Validation Rules)	PDF
Budget Insight	PDF
Car Configuration	PDF
Cash Advance	PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

Additional Release Notes and Other Technical Documentation: Concur Support Portal – Selected Users

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



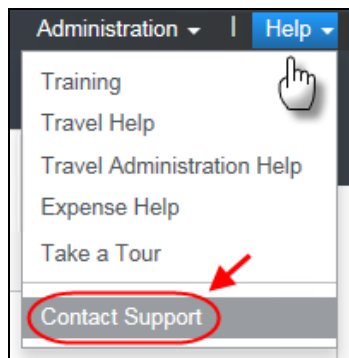
Cases

Steps for Getting a Status

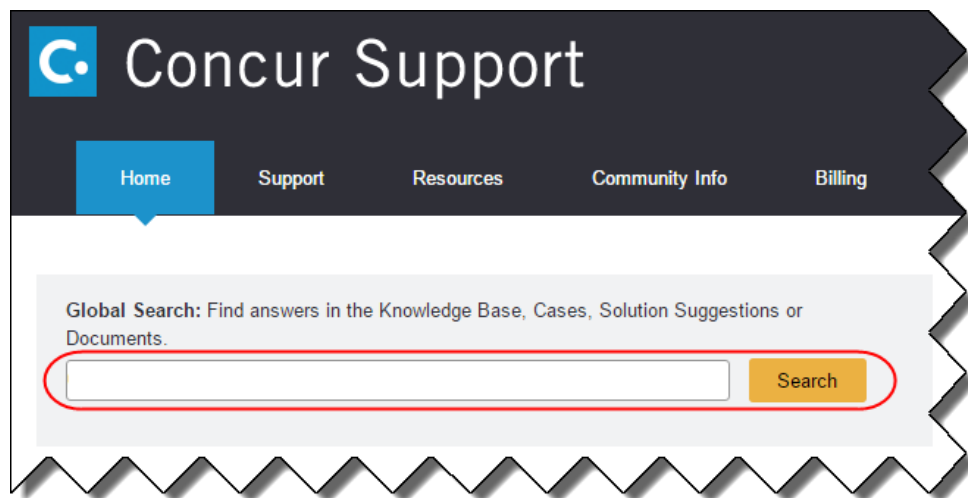
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

April Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11490864	Japan Public Transport Screen unresponsive while attempting to edit multiple expenses from network IC card entries.
11149322	<i>SAP Concur has edited the code and corrected this issue. It is consistently possible to edit multiple expenses.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: May 12, 2018 Update #1: Tuesday, May 15, 9:15 AM PT	Client FINAL

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Release Notes

Admin

New Cookie Preferences Link in the SAP Concur Footer

Overview

During the May 12 release, some cookie-related process changes and links were introduced because of specific consent requirements in Europe.

There are two types of consent when allowing cookies to be saved on the user's computer. As described on the following pages, each country decides which option to use. The options are:

- **Active consent:** The user actively agrees to accept cookies. In this case, SAP Concur is required to obtain user consent before loading any cookies on a user's computer.
- **Passive consent:** The user does not prevent cookies.

IMPORTANT

This release note discusses consent for and modification of cookies. Note the following:

- TrustArc, a global privacy and data governance provider, monitors and manages the cookie-related processes for SAP Concur.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. ***There is no option for companies to make these choices for their users.***
- Once a user has accepted cookies, they cannot modify their cookies options to stop accepting cookies.
- Concur is taking a phased approach to some of these changes. For example, not all clients will immediately see the **Cookie Preferences** link (described below). In addition, over the next two weeks, some of the options may have subtle changes. Regardless, all changes will be available and in effect by May 25.

BUSINESS PURPOSE/CLIENT BENEFIT

These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

What the user sees depends on the country in which the user is located. Each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

⚠ IMPORTANT: Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.

As the user is signing in to SAP Concur, TrustArc identifies the country associated with the user and determines if user consent is active or passive.

ACTIVE CONSENT REQUIRED

If active consent is required – before the user can access any SAP Concur page – the user sees the **About cookies on this site** window.

About cookies on this site SAP Concur 

Cookies are important to the proper functioning of a site. To improve your experience, we use cookies to remember log-in details and provide secure log-in, collect statistics to optimize site functionality, and deliver content tailored to your interests. Click Agree and Proceed to accept cookies and go directly to the site or click on View Cookie Settings to see detailed descriptions of the types of cookies and choose whether to accept certain cookies while on the site.

[Agree and Proceed](#) [View Cookie Settings »](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by:  TrustArc | TRUSTe

The user can:

- Read the agreement text and then click **Agree and Proceed**; the user is then directed into SAP Concur.
- **or** –
- Click **View Cookie Settings** to see other options.

NOTE: The user cannot bypass this page. If the user chooses to **not** accept cookies, the user cannot access SAP Concur.

If the user clicks **View Cookie Settings**, this page appears.

About cookies on this site



Please choose whether this site may use Functional and/or Advertising cookies, as described below:

REQUIRED COOKIES

These cookies are required to enable core site functionality.

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

[Privacy Policy](#) | Powered by:  TRUSTe

On this page, the user can slide the bar on the left to accept:

- **Required cookies:** Those required to use SAP Concur services.
- **Required and functional cookies:** Required cookies *plus* those used for performance and usage analysis.
- **Required, functional, and advertising cookies:** Required cookies *plus* functional cookies *plus* cookies used for advertisements.

The user can:

- Click **Cancel** and return to the previous page.
– **or** –
- Slide the bar to make their choice and then click **Submit Preferences**.
– **or** –
- Click **Advanced Settings**.

If the user clicks **Advanced Settings**, they will have a read-only view of the existing cookies.

Once the user consents, the requirement is satisfied and the window does not appear again.

PASSIVE CONSENT

In some countries, once the user has accessed SAP Concur, a banner similar to the one below appears at the top of the SAP Concur page.

SAP Concur Release Notes
Release Date: May 12, 2018
Update #1: Tuesday, May 15, 9:15 AM PT

Page 3

Expense Professional / Premium
Client FINAL

By using the SAP site, you agree with our use of cookies.

[I consent to cookies](#) [Want to know more?](#)

Whether or not the user actively consents, consent is implied. The user can continue to work in SAP Concur and the banner does not interfere with the user's tasks; however, the banner remains until the user clicks **I consent to cookies**.

The user clicks **Want to know more?**, the user sees the cookie options (as described previously).

About cookies on this site

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

—

REQUIRED COOKIES

These cookies are required to enable core site functionality.

—

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

—

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

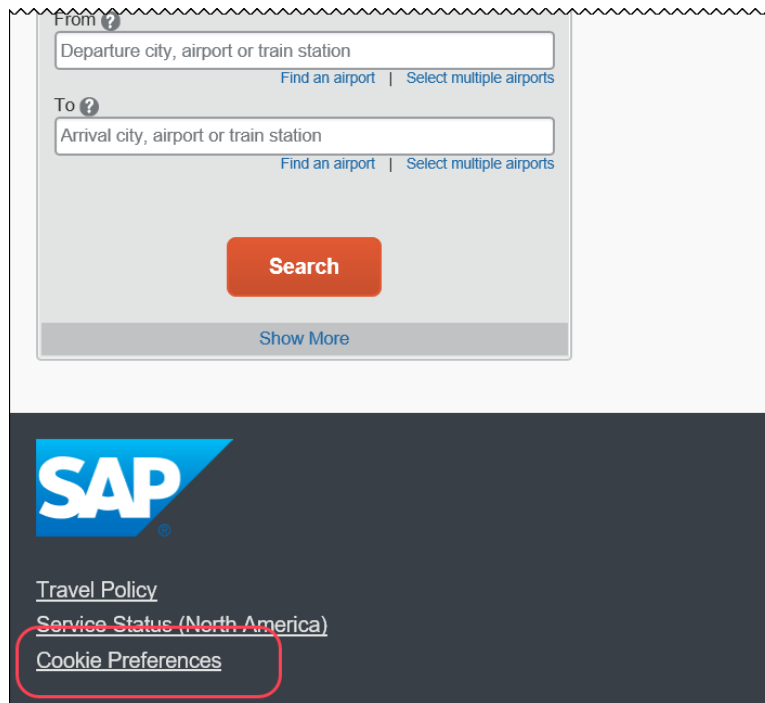
Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by: [TrustArc](#) | TRUSTe

Once the user consents, the requirement is satisfied and the banner does not appear again.

MAKING CHANGES

Certain users will see the **Cookie Preferences** link in the footer.



The screenshot shows the SAP Concur search interface. At the top, there are two input fields: "From" and "To", both with a question mark icon. Below each field is a text input area with the placeholder "Departure city, airport or train station" and "Arrival city, airport or train station" respectively. To the right of each input area are two links: "Find an airport" and "Select multiple airports". Below these fields is a red "Search" button. At the bottom of the search area is a "Show More" link. The footer of the page is dark gray and contains the SAP logo, a "Travel Policy" link, a "Service Status (North America)" link, and a "Cookie Preferences" link which is highlighted with a red rounded rectangle.

This link allows users to view their existing cookie settings and make adjustments, if desired. Over time, all users will see this link and be able to modify their cookie settings.

Configuration/Feature Activation

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

Privacy Agreement Page Removed; New SAP Concur Privacy Statement

Overview

For customers who currently display the **Privacy Agreement** page to users, be aware that – with this release – SAP Concur will eliminate that page. That means, the existing **Privacy Agreement** page will no longer display, under any circumstances. With that, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

Also with this release, SAP Concur will provide a standard privacy statement, which can be accessed via a link in the page footer. The new SAP Concur Privacy Statement describes SAP Concur's responsibility as a "processor" of customer data.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur Privacy Statement.

What the User Sees

With this release, a user can access the new SAP Concur Privacy Statement by clicking the **Processor Privacy Statement** link in the lower-left corner of any page in the web version of Concur. A user can also access it by clicking the **Privacy Policy** link in Settings in the SAP Concur mobile app.

"PROCESSOR" OF CUSTOMER DATA

The new privacy statement is required because SAP Concur is a "processor" of customer data.

 **IMPORTANT:** Be aware that the term "processor" here is *not* at all related to the Processor roles found in most SAP Concur products.

PRIVACY STATEMENT TEXT

The new SAP Concur Privacy Statement text is available here:

<https://www.concur.com/en-us/processor-privacy-statement>

FAQs

Q. Why can't I continue using the existing **Privacy Agreement** page?

A. SAP Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within SAP Concur services.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Some customers have used the **Privacy Agreement** page to convey company-specific information to its users. That option is no longer available. Customers must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. Will I be able to require that users read and accept the privacy statement before being able to access the SAP Concur service?

A. The SAP Concur Privacy Statement will not be configurable by customers in any way. Its function is to describe SAP Concur's processing activities of customer data.

Configuration / Feature Activation

This change will occur automatically; there are no additional configuration or activation steps. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

****UPDATE** Processor Privacy Statement Link – Available This Week**

Overview

For the past few months, the release notes stated that – for the May 12 release – the existing **Privacy Agreement** page would be retired and the new **Processor Privacy Statement** link would become available in the lower-left corner of the SAP Concur footer.

In fact, the **Privacy Agreement** page has been removed but the **Processor Privacy Statement** link is not yet available. Additional changes are being made so the **Processor Privacy Statement** link will appear in the footer this week.

NOTE: In the *New Cookie Preferences Link in the SAP Concur Footer* release note below, note that there is a **Privacy Policy** link at the bottom of the **About cookies on this site** window. Users can view the new privacy statement there, if desired, until the **Processor Privacy Statement** link becomes available later this week.

Configuration/Feature Activation

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

SAP Concur Updating to sap.com Email Addresses

Overview

SAP Concur is updating our employee's outgoing email to use sap.com instead of concur.com email addresses. This means clients will receive email communications from both domains. Clients may want to contact their IT department to add "sap.com" to their email whitelist.

Communications sent to SAP Concur using the concur.com email addresses will continue to be supported, including:

- plans@concur.com
- receipts@concur.com

and all other existing concur.com email addresses.

BACKGROUND

In January of this year, we shared with you our evolution to the SAP Concur logo and brand. As part of our evolution to the SAP Concur brand, and as we continue to leverage the assets available to us as members of the SAP family, you can expect to see email communication from Concur that may come from the @sap.com email domain, in addition to @concur.com. Rest assured, communication from either address will be from the same person, and you can engage with us via either address.

BUSINESS PURPOSE / CLIENT BENEFIT

SAP Concur is moving to the SAP brand, which includes updating email communications to use email addresses on the sap.com domain.

Configuration / Feature Activation

SAP Concur made this change automatically on April 14, 2018. Clients do not need to make any changes to their existing processes.

Budget

Budget Release Notes

Overview

Clients can view new budget functionality and enhancements in the new Budget Release Notes which are located on the same page as the other product release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Company Card

Addition of Income and Transfer Transaction Categories to Yodlee

Overview

With this release, users of Yodlee are now able to work with transaction data from the **Income** and **Transfer** categories. Prior to this change, transactions falling into either of these categories were set as undefined and hidden by the system. With this change, these transactions are now correctly categorized for the client.

Please note that this feature enhancement will still filter out transactions categorized as payment or account settlement because they are not expense-report related. As

the integration is based on an individual registration, the end user would delete what is not eligible to expense report reimbursement.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement extends the scope of what flows into Concur, allowing clients to process their card transactions by bringing support for the missing **Income** and **Transfer** categories to the Expense product.

Configuration/Feature Activation

This new mapping is not configurable and is now automatically available to all clients; there are no activation steps.

Change to AMEX GL 1022 “No Vendor Supplied” Card Feed Data Handling

Overview

With this release, clients moving to the GL-1022 American Express card feed will note enhanced handling of the “American Express Initiated Activity” data to match that of the GL-1025 feed. With this upcoming change, data will yield values for **Merchant Name** and/or **Vendor Name** instead of returning a “No Vendor Supplied” message.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement updates the GL-1022 data reconciliation to match the behavior of the GL-1025 card feed.

Preparing for This Change

Clients whose audit rule definitions will trigger based on the existing *Vendor Name = No Vendor Supplied* feed return value should review and, if necessary, update these configurations to match the new behavior of the GL-1022 card feed.

Configuration/Feature Activation

Concur has automatically implemented this change.

Data Retention

New Early Access Feature for Outdated Data

Overview

SAP Concur has a new feature, Data Retention, that allows clients to control how long the Concur solution stores their data based on who, when, and where criteria. A new shared role, **Data Retention Administrator**, has been created in the system and is required for accessing this feature.

The feature provides the following functionality:

- Allows a company to set a specific amount of calendar time after which data such as old user profiles, itineraries, and expense reports will be removed.
- Provides for strict access to policy configuration with an email notification.
- Includes the ability to place a hold on a specific user whose data will be excluded by this feature when it is necessary or desirable to retain older data.
- Includes the ability to remove the data of a specific user independent of the company-wide data retention configuration.
- Provides a high-level summary of events to monitor data retention activities.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

If enabled by SAP Concur, at the bottom of the **Company Administration** page, the client admin will see a **Data Retention** link.

The screenshot displays the SAP Concur 'Company Administration' page. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, App Center, and Links. The main content area is titled 'Company Administration' and lists various administrative tasks. A red circle highlights the 'Data Retention' link in the bottom left section of the page.

Company Administration

- Company Admin**
 - Approval Queues
 - Billing Administrator
 - Company Locations
 - Menu Administrator
 - Org Unit Admin
 - Report Admin
 - Text Customization
 - Password Administrator
 - Manage Custom Fields
 - Calendar Integration Admin
 - Company Settings
 - Share Custom Fields
 - Login URL Manager
- User Administration**
 - User Administration
 - Add User
 - Self-Registration Setup
 - Self-Registration Approval
 - Send Mobile Instructions
 - User Permissions
 - Company Groups
- Travel Administration**
 - Corporate Ghost Cards
 - Virtual Payment Admin
 - E-Receipt Admin
 - Travel Admin
 - Travel Rule Builder
 - Travel Reporting
 - Travel Templates
 - Credit Card BIN Restrictions
 - Unused Tickets
 - Meeting Center Admin
 - Manage Corporate Discounts
 - Manage Segment Fees
- Risk Administration**
 - Risk Management
- Group Administration**
 - Shared Contact Categories
 - Shared Marketing Categories
 - Shared Todo Lists
 - Data Retention**

Additional Admin Links:

- Administer Approval Queue**: Here is where you reassign items from one manager to another, if a manager is unavailable for some reason.
- Meetings Admin**: Administer Meetings
- Group and Shared Resources Administration**: Manage groups of people, and shared resources like group calendars and group contacts.
- Organization Unit Administration**: Set up your company's organizational units/departments.
- Travel Meeting Center Admin Third Party**: Can manage Travel Meetings
- User Administration**: Here is where you add, modify and delete users.
- Billing Administrator**: View current and past bills.
- Company Locations and Maps**: Where are your offices? Modify your business locations.
- Menu Administrator**: Configure Concur menus to display URLs in our menu headings.
- Permission Administrator**: Who can access what? Setup your permissions (user classes) here.
- Travel Policy Administrator**: Administer your company's travel policy.

Footer:

CONCUR
 Travel Policy
 Service Status (North America)
 © Copyright 2018 - Concur - All Rights Reserved



For more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this early access feature becomes available as part of the May release, you may request that it be enabled for your company by contacting Concur Customer Support.

New 23-Month Filter

Overview

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View transactions
- Unassigned Cash Advances

 **IMPORTANT:** Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Using **View Transactions**, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | New Feature for Outdated Data* release note included in this month's Release Notes.

Expense Pay – Global

(Canada) Additional Card Programs Now Supported for CAD

Overview

Expense Pay – Global for Expense now supports the following credit card programs for the Canadian Dollar (CAD \$):

- Citibank MasterCard CAD
- Citibank Visa CAD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

The screenshot shows the 'Add New Card Program' form. The 'Program Type' dropdown menu is highlighted with a red circle. The form contains the following fields and options:

- Program Name:** A text input field.
- Payment Type:** A dropdown menu.
- Program Type:** A dropdown menu, highlighted with a red circle.
- Currency:** A text input field.
- Active:** A dropdown menu with 'Yes' selected.
- Classic:** A checkbox.
- Global:** A checkbox.
- Verify IIN:** A link.
- Save:** A blue button.
- Cancel:** A text button.

Configuration/Feature Activation

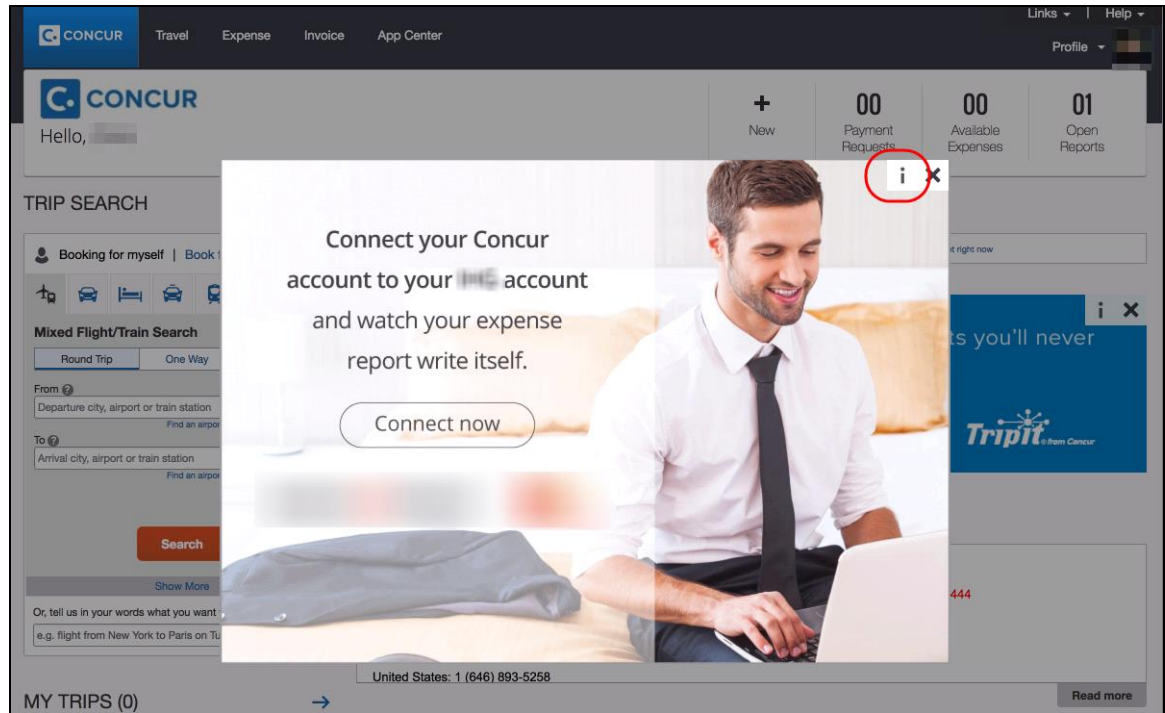
Concur automatically implemented these changes; there are no configuration or activation steps.

In-Product Messaging (IPM)

Clarification: Opt Out of In-Product Messaging

Overview

For the past few months, there have been release notes about users being able to opt out of in-product messaging (IPM).



Just to clarify:

- **For customers deployed to the EMEA Data Center**, users were provided the ability to opt out late last year.
- **For customers deployed to the North America Data Center**, users will be provided the ability to opt out in stages, with SAP Concur planning to have this feature fully available by the end of April.

⚠ IMPORTANT: There are certain messages of critical importance that a user cannot opt out of receiving, for example, messages asking the user to accept updated terms.

Configuration/Feature Activation

The ability to opt out occurs automatically; there are no additional configuration or activation steps.

Japan Public Transport (JPT)

IC Card Numbers Removed from Receipt Images

Overview

When Concur renders receipt images for Japan Public Transport (JPT), they will no longer include IC Card numbers.

NOTE: SAP Concur will not modify or replace existing receipt images that were rendered prior to this change.

BUSINESS PURPOSE/CLIENT BENEFIT

This change increases personal privacy for Concur users.

Configuration/Feature Activation

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

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

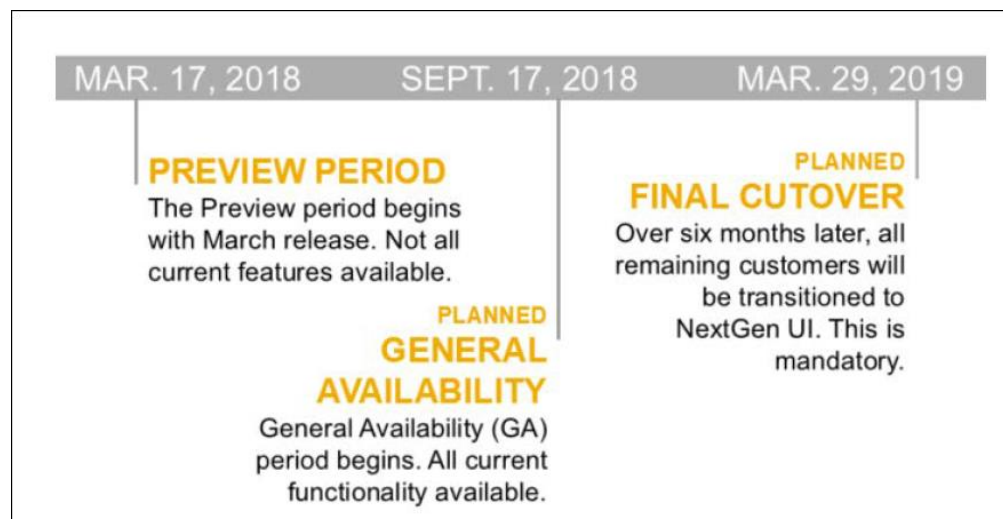
The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense****Ongoing** New User Interface for Concur Expense End Users****Overview**

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.

**BUSINESS PURPOSE / CLIENT BENEFIT**

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

SAP Concur's Platform

Callout Server Requirements Update

Overview

The SAP Concur servers that support the SAP Concur Platform Callouts are scheduled for an upgrade. This maintenance includes the Production Proxy Migration (North America Data Center only) and PWS Server Migration to VM (EMEA And North American Data Centers only). The PWS Server Migration to VM was completed on May 2, 2018. The Production Proxy Migration began on May 9, 2018 with one third of the traffic routed through the Production proxy. The other two thirds of the traffic is estimated to migrate through the Production proxy the week of May 14, 2018.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.
- Clients who whitelist access for Concur callout traffic from the North America Data Center (not common) may need to update their access control list (ACL) to IP 12.129.29.86.

 **IMPORTANT:** If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur will automatically implement these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expenses Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

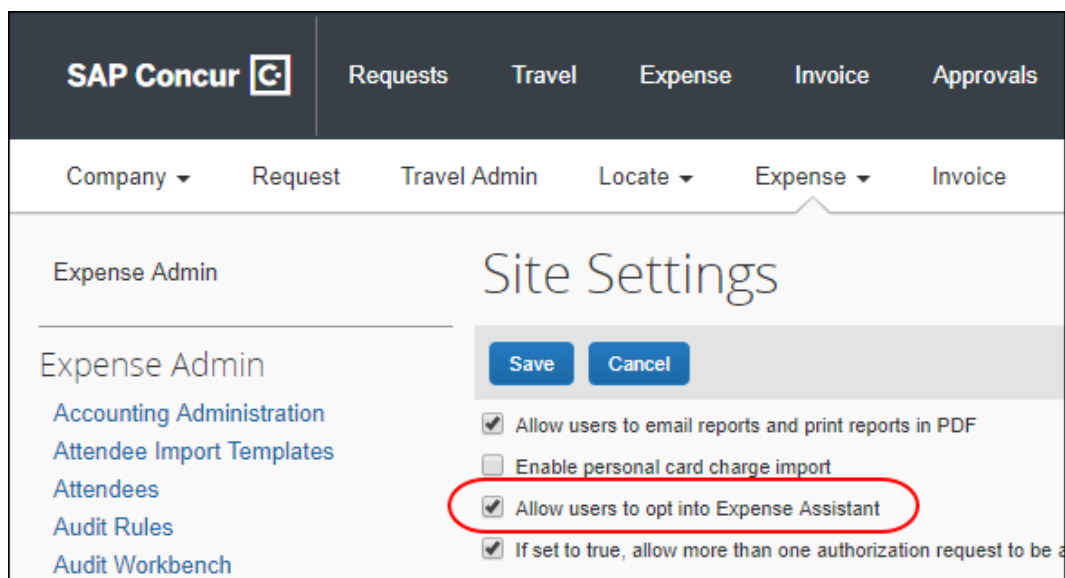
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration/Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly* only options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

 **IMPORTANT:** SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

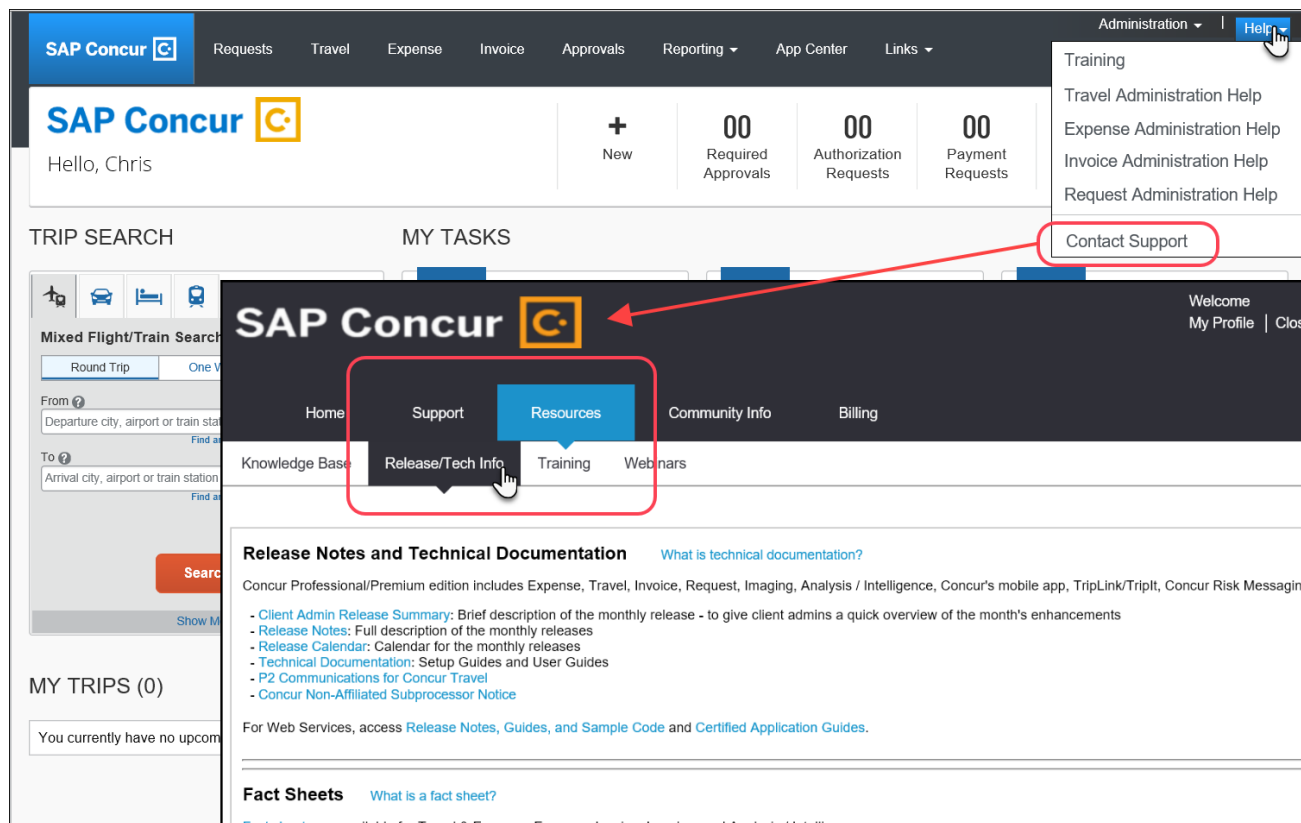
Expense Setup Guides

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



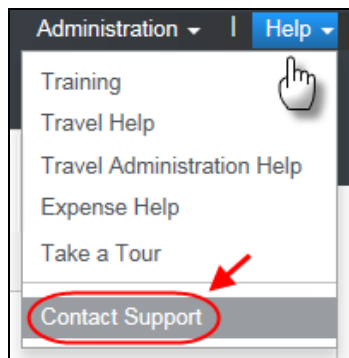
Cases

Steps for Getting a Status

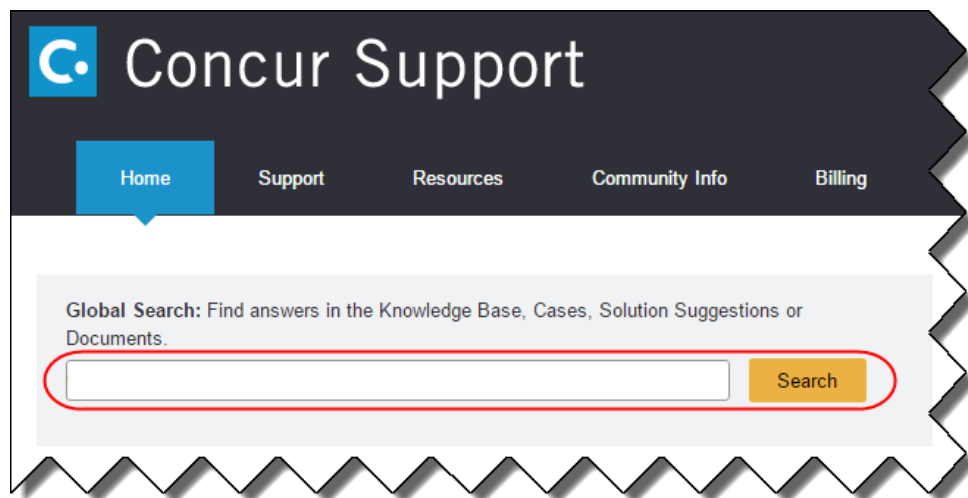
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

May Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11035982	Smart Expenses The transaction amount and exchange rate of the report entry from the credit card did not match the credit card feed. <i>The code has been corrected to prevent future instances of this issue.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: May 12, 2018 Update #2: Tuesday, May 15, 3:30 PM PT	Client FINAL

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Release Notes

Admin

New Cookie Preferences Link in the SAP Concur Footer

Overview

During the May 12 release, some cookie-related process changes and links were introduced because of specific consent requirements in Europe.

There are two types of consent when allowing cookies to be saved on the user's computer. As described on the following pages, each country decides which option to use. The options are:

- **Active consent:** The user actively agrees to accept cookies. In this case, SAP Concur is required to obtain user consent before loading any cookies on a user's computer.
- **Passive consent:** The user does not prevent cookies.

IMPORTANT

This release note discusses consent for and modification of cookies. Note the following:

- TrustArc, a global privacy and data governance provider, monitors and manages the cookie-related processes for SAP Concur.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. ***There is no option for companies to make these choices for their users.***
- Once a user has accepted cookies, they cannot modify their cookies options to stop accepting cookies.
- Concur is taking a phased approach to some of these changes. For example, not all clients will immediately see the **Cookie Preferences** link (described below). In addition, over the next two weeks, some of the options may have subtle changes. Regardless, all changes will be available and in effect by May 25.

BUSINESS PURPOSE/CLIENT BENEFIT

These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

What the user sees depends on the country in which the user is located. Each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

⚠ IMPORTANT: Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.

As the user is signing in to SAP Concur, TrustArc identifies the country associated with the user and determines if user consent is active or passive.

ACTIVE CONSENT REQUIRED

If active consent is required – before the user can access any SAP Concur page – the user sees the **About cookies on this site** window.

About cookies on this site

SAP Concur 

Cookies are important to the proper functioning of a site. To improve your experience, we use cookies to remember log-in details and provide secure log-in, collect statistics to optimize site functionality, and deliver content tailored to your interests. Click Agree and Proceed to accept cookies and go directly to the site or click on View Cookie Settings to see detailed descriptions of the types of cookies and choose whether to accept certain cookies while on the site.

Agree and Proceed

View Cookie Settings »

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by:  TrustArc | TRUSTe

The user can:

- Read the agreement text and then click **Agree and Proceed**; the user is then directed into SAP Concur.
– **or** –
- Click **View Cookie Settings** to see other options.

NOTE: The user cannot bypass this page. If the user chooses to **not** accept cookies, the user cannot access SAP Concur.

If the user clicks **View Cookie Settings**, this page appears.

About cookies on this site



Please choose whether this site may use Functional and/or Advertising cookies, as described below:

REQUIRED COOKIES

These cookies are required to enable core site functionality.

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

[Privacy Policy](#) | Powered by:  TRUSTe

On this page, the user can slide the bar on the left to accept:

- **Required cookies:** Those required to use SAP Concur services.
- **Required and functional cookies:** Required cookies *plus* those used for performance and usage analysis.
- **Required, functional, and advertising cookies:** Required cookies *plus* functional cookies *plus* cookies used for advertisements.

The user can:

- Click **Cancel** and return to the previous page.
– **or** –
- Slide the bar to make their choice and then click **Submit Preferences**.
– **or** –
- Click **Advanced Settings**.

If the user clicks **Advanced Settings**, they will have a read-only view of the existing cookies.

Once the user consents, the requirement is satisfied and the window does not appear again.

PASSIVE CONSENT

In some countries, once the user has accessed SAP Concur, a banner similar to the one below appears at the top of the SAP Concur page.

SAP Concur Release Notes
Release Date: May 12, 2018
Update #2: Tuesday, May 15, 3:30 PM PT

Page 3

Expense Professional / Premium
Client FINAL

By using the SAP site, you agree with our use of cookies.

[I consent to cookies](#) [Want to know more?](#)

Whether or not the user actively consents, consent is implied. The user can continue to work in SAP Concur and the banner does not interfere with the user's tasks; however, the banner remains until the user clicks **I consent to cookies**.

The user clicks **Want to know more?**, the user sees the cookie options (as described previously).

About cookies on this site

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

REQUIRED COOKIES

These cookies are required to enable core site functionality.

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

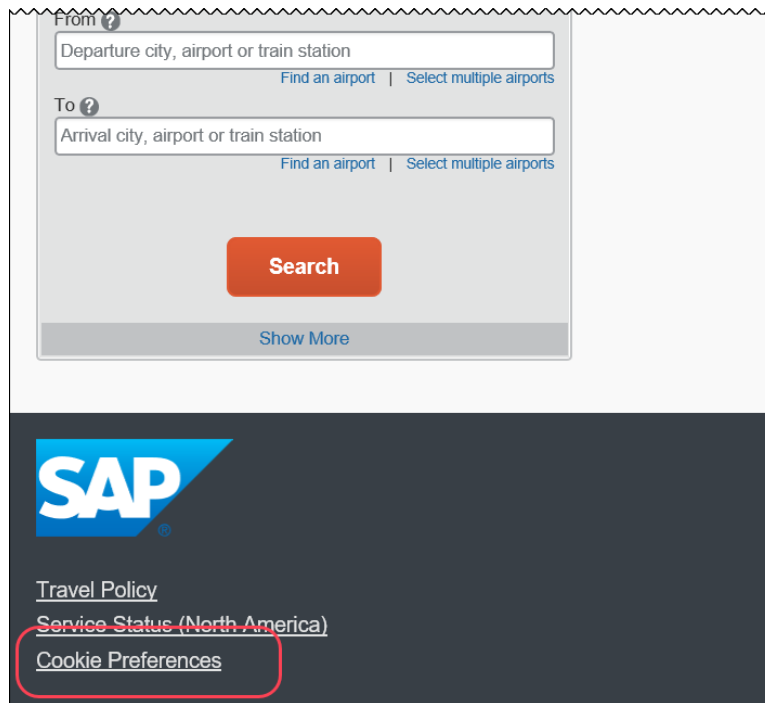
Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by: [TrustArc](#) | TRUSTe

Once the user consents, the requirement is satisfied and the banner does not appear again.

MAKING CHANGES

Certain users will see the **Cookie Preferences** link in the footer.



The screenshot shows a search interface with two input fields: "From" (Departure city, airport or train station) and "To" (Arrival city, airport or train station). Each field has a "Find an airport" link and a "Select multiple airports" link. A red "Search" button is below the fields, and a "Show More" link is at the bottom. The footer area is dark gray and contains the SAP logo, a "Travel Policy" link, a "Service Status (North America)" link, and a "Cookie Preferences" link which is circled in red.

This link allows users to view their existing cookie settings and make adjustments, if desired. Over time, all users will see this link and be able to modify their cookie settings.

Configuration/Feature Activation

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

Privacy Agreement Page Removed; New SAP Concur Privacy Statement

Overview

For customers who currently display the **Privacy Agreement** page to users, be aware that – with this release – SAP Concur will eliminate that page. That means, the existing **Privacy Agreement** page will no longer display, under any circumstances. With that, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

Also with this release, SAP Concur will provide a standard privacy statement, which can be accessed via a link in the page footer. The new SAP Concur Privacy Statement describes SAP Concur's responsibility as a "processor" of customer data.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur Privacy Statement.

What the User Sees

With this release, a user can access the new SAP Concur Privacy Statement by clicking the **Processor Privacy Statement** link in the lower-left corner of any page in the web version of Concur. A user can also access it by clicking the **Privacy Policy** link in Settings in the SAP Concur mobile app.

"PROCESSOR" OF CUSTOMER DATA

The new privacy statement is required because SAP Concur is a "processor" of customer data.

 **IMPORTANT:** Be aware that the term "processor" here is *not* at all related to the Processor roles found in most SAP Concur products.

PRIVACY STATEMENT TEXT

The new SAP Concur Privacy Statement text is available here:

<https://www.concur.com/en-us/processor-privacy-statement>

FAQs

Q. Why can't I continue using the existing **Privacy Agreement** page?

A. SAP Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within SAP Concur services.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Some customers have used the **Privacy Agreement** page to convey company-specific information to its users. That option is no longer available. Customers must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. Will I be able to require that users read and accept the privacy statement before being able to access the SAP Concur service?

A. The SAP Concur Privacy Statement will not be configurable by customers in any way. Its function is to describe SAP Concur's processing activities of customer data.

Configuration / Feature Activation

This change will occur automatically; there are no additional configuration or activation steps. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

****UPDATE** Processor Privacy Statement Link – Available This Week**

Overview

For the past few months, the release notes stated that – for the May 12 release – the existing **Privacy Agreement** page would be retired and the new **Processor Privacy Statement** link would become available in the lower-left corner of the SAP Concur footer.

In fact, the **Privacy Agreement** page has been removed but the **Processor Privacy Statement** link is not yet available. Additional changes are being made so the **Processor Privacy Statement** link will appear in the footer this week.

NOTE: In the *New Cookie Preferences Link in the SAP Concur Footer* release note below, note that there is a **Privacy Policy** link at the bottom of the **About cookies on this site** window. Users can view the new privacy statement there, if desired, until the **Processor Privacy Statement** link becomes available later this week.

Configuration/Feature Activation

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

SAP Concur Updating to sap.com Email Addresses

Overview

SAP Concur is updating our employee's outgoing email to use sap.com instead of concur.com email addresses. This means clients will receive email communications from both domains. Clients may want to contact their IT department to add "sap.com" to their email whitelist.

Communications sent to SAP Concur using the concur.com email addresses will continue to be supported, including:

- plans@concur.com
- receipts@concur.com

and all other existing concur.com email addresses.

BACKGROUND

In January of this year, we shared with you our evolution to the SAP Concur logo and brand. As part of our evolution to the SAP Concur brand, and as we continue to leverage the assets available to us as members of the SAP family, you can expect to see email communication from Concur that may come from the @sap.com email domain, in addition to @concur.com. Rest assured, communication from either address will be from the same person, and you can engage with us via either address.

BUSINESS PURPOSE / CLIENT BENEFIT

SAP Concur is moving to the SAP brand, which includes updating email communications to use email addresses on the sap.com domain.

Configuration / Feature Activation

SAP Concur made this change automatically on April 14, 2018. Clients do not need to make any changes to their existing processes.

Budget

Budget Release Notes

Overview

Clients can view new budget functionality and enhancements in the new Budget Release Notes which are located on the same page as the other product release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Company Card

Addition of Income and Transfer Transaction Categories to Yodlee

Overview

With this release, users of Yodlee are now able to work with transaction data from the **Income** and **Transfer** categories. Prior to this change, transactions falling into either of these categories were set as undefined and hidden by the system. With this change, these transactions are now correctly categorized for the client.

Please note that this feature enhancement will still filter out transactions categorized as payment or account settlement because they are not expense-report related. As

the integration is based on an individual registration, the end user would delete what is not eligible to expense report reimbursement.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement extends the scope of what flows into Concur, allowing clients to process their card transactions by bringing support for the missing **Income** and **Transfer** categories to the Expense product.

Configuration/Feature Activation

This new mapping is not configurable and is now automatically available to all clients; there are no activation steps.

Change to AMEX GL 1022 “No Vendor Supplied” Card Feed Data Handling

Overview

With this release, clients moving to the GL-1022 American Express card feed will note enhanced handling of the “American Express Initiated Activity” data to match that of the GL-1025 feed. With this upcoming change, data will yield values for **Merchant Name** and/or **Vendor Name** instead of returning a “No Vendor Supplied” message.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement updates the GL-1022 data reconciliation to match the behavior of the GL-1025 card feed.

Preparing for This Change

Clients whose audit rule definitions will trigger based on the existing *Vendor Name = No Vendor Supplied* feed return value should review and, if necessary, update these configurations to match the new behavior of the GL-1022 card feed.

Configuration/Feature Activation

Concur has automatically implemented this change.

Data Retention

New Early Access Feature for Outdated Data

Overview

SAP Concur has a new feature, Data Retention, that allows clients to control how long the Concur solution stores their data based on who, when, and where criteria. A new shared role, **Data Retention Administrator**, has been created in the system and is required for accessing this feature.

The feature provides the following functionality:

- Allows a company to set a specific amount of calendar time after which data such as old user profiles, itineraries, and expense reports will be removed.
- Provides for strict access to policy configuration with an email notification.
- Includes the ability to place a hold on a specific user whose data will be excluded by this feature when it is necessary or desirable to retain older data.
- Includes the ability to remove the data of a specific user independent of the company-wide data retention configuration.
- Provides a high-level summary of events to monitor data retention activities.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

If enabled by SAP Concur, at the bottom of the **Company Administration** page, the client admin will see a **Data Retention** link.

The screenshot displays the SAP Concur 'Company Administration' page. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, App Center, and Links. The main content area is titled 'Company Administration' and lists various administrative tasks. A red circle highlights the 'Data Retention' link in the bottom left section of the page.

Company Administration

- Company Admin**
 - Approval Queues
 - Billing Administrator
 - Company Locations
 - Menu Administrator
 - Org Unit Admin
 - Report Admin
 - Text Customization
 - Password Administrator
 - Manage Custom Fields
 - Calendar Integration Admin
 - Company Settings
 - Share Custom Fields
 - Login URL Manager
- User Administration**
 - User Administration
 - Add User
 - Self-Registration Setup
 - Self-Registration Approval
 - Send Mobile Instructions
 - User Permissions
 - Company Groups
- Travel Administration**
 - Corporate Ghost Cards
 - Virtual Payment Admin
 - E-Receipt Admin
 - Travel Admin
 - Travel Rule Builder
 - Travel Reporting
 - Travel Templates
 - Credit Card BIN Restrictions
 - Unused Tickets
 - Meeting Center Admin
 - Manage Corporate Discounts
 - Manage Segment Fees
- Risk Administration**
 - Risk Management
- Group Administration**
 - Shared Contact Categories
 - Shared Marketing Categories
 - Shared Todo Lists
 - Data Retention**

Additional Admin Links:

- Administer Approval Queue**: Here is where you reassign items from one manager to another, if a manager is unavailable for some reason.
- Meetings Admin**: Administer Meetings
- Group and Shared Resources Administration**: Manage groups of people, and shared resources like group calendars and group contacts.
- Organization Unit Administration**: Set up your company's organizational units/departments.
- Travel Meeting Center Admin Third Party**: Can manage Travel Meetings
- User Administration**: Here is where you add, modify and delete users.
- Billing Administrator**: View current and past bills.
- Company Locations and Maps**: Where are your offices? Modify your business locations.
- Menu Administrator**: Configure Concur menus to display URLs in our menu headings.
- Permission Administrator**: Who can access what? Setup your permissions (user classes) here.
- Travel Policy Administrator**: Administer your company's travel policy.

Footer:

CONCUR
Travel Policy
Service Status (North America)
© Copyright 2018 - Concur - All Rights Reserved



For more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this early access feature becomes available as part of the May release, you may request that it be enabled for your company by contacting Concur Customer Support.

New 23-Month Filter

Overview

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View transactions
- Unassigned Cash Advances

 **IMPORTANT:** Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Using **View Transactions**, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | New Feature for Outdated Data* release note included in this month's Release Notes.

Expense Pay – Global

(Canada) Additional Card Programs Now Supported for CAD

Overview

Expense Pay – Global for Expense now supports the following credit card programs for the Canadian Dollar (CAD \$):

- Citibank MasterCard CAD
- Citibank Visa CAD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

Add New Card Program ✕

Program Name

Payment Type
 ▼

Program Type:
 ▼ [Verify IIN](#)

Currency

Active
 Yes ▼

☐ Classic ☐ Global

[Save](#) [Cancel](#)

Configuration/Feature Activation

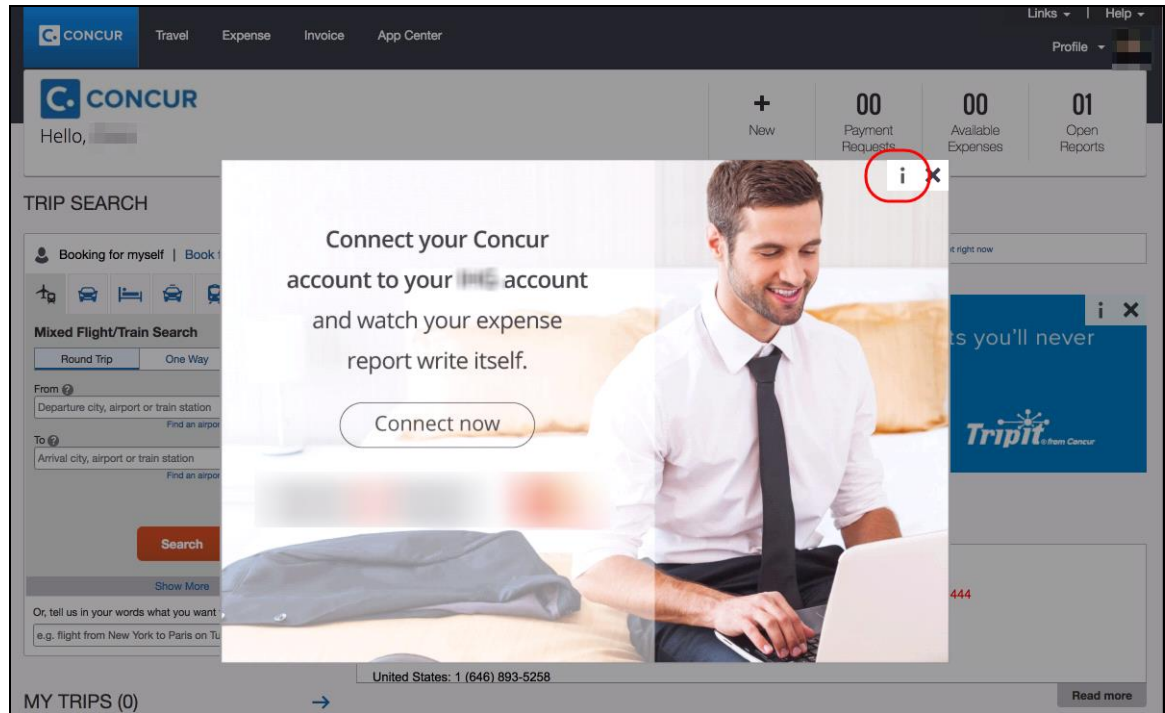
Concur automatically implemented these changes; there are no configuration or activation steps.

In-Product Messaging (IPM)

Clarification: Opt Out of In-Product Messaging

Overview

For the past few months, there have been release notes about users being able to opt out of in-product messaging (IPM).



Just to clarify:

- **For customers deployed to the EMEA Data Center**, users were provided the ability to opt out late last year.
- **For customers deployed to the North America Data Center**, users will be provided the ability to opt out in stages, with SAP Concur planning to have this feature fully available by the end of April.

⚠ IMPORTANT: There are certain messages of critical importance that a user cannot opt out of receiving, for example, messages asking the user to accept updated terms.

Configuration/Feature Activation

The ability to opt out occurs automatically; there are no additional configuration or activation steps.

Japan Public Transport (JPT)

IC Card Numbers Removed from Receipt Images

Overview

When Concur renders receipt images for Japan Public Transport (JPT), they will no longer include IC Card numbers.

NOTE: SAP Concur will not modify or replace existing receipt images that were rendered prior to this change.

BUSINESS PURPOSE/CLIENT BENEFIT

This change increases personal privacy for Concur users.

Configuration/Feature Activation

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

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

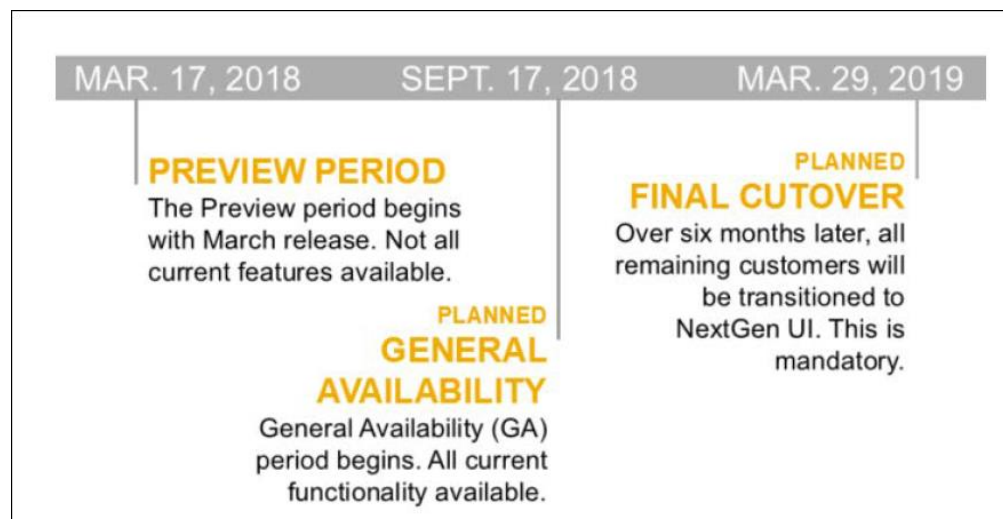
The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense****Ongoing** New User Interface for Concur Expense End Users****Overview**

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.

**BUSINESS PURPOSE / CLIENT BENEFIT**

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

SAP Concur's Platform

Callout Server Requirements Update

Overview

The SAP Concur servers that support the SAP Concur Platform Callouts are scheduled for an upgrade. This maintenance includes the Production Proxy Migration (North America Data Center only) and PWS Server Migration to VM (EMEA And North American Data Centers only). The PWS Server Migration to VM was completed on May 2, 2018. The Production Proxy Migration began on May 9, 2018 with one third of the traffic routed through the Production proxy. The other two thirds of the traffic is estimated to migrate through the Production proxy the week of May 14, 2018.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.
- Clients who whitelist access for Concur callout traffic from the North America Data Center (not common) may need to update their access control list (ACL) to IP 12.129.29.86.

 **IMPORTANT:** If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur will automatically implement these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expenses Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

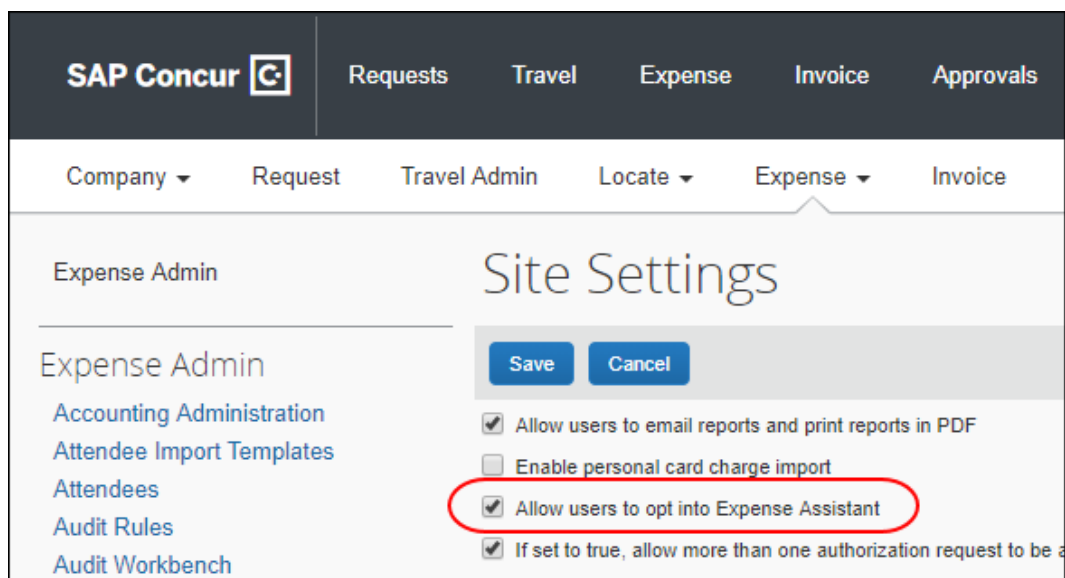
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration/Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

⚠ IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.



IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 **(SAP Concur preferred method)**
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

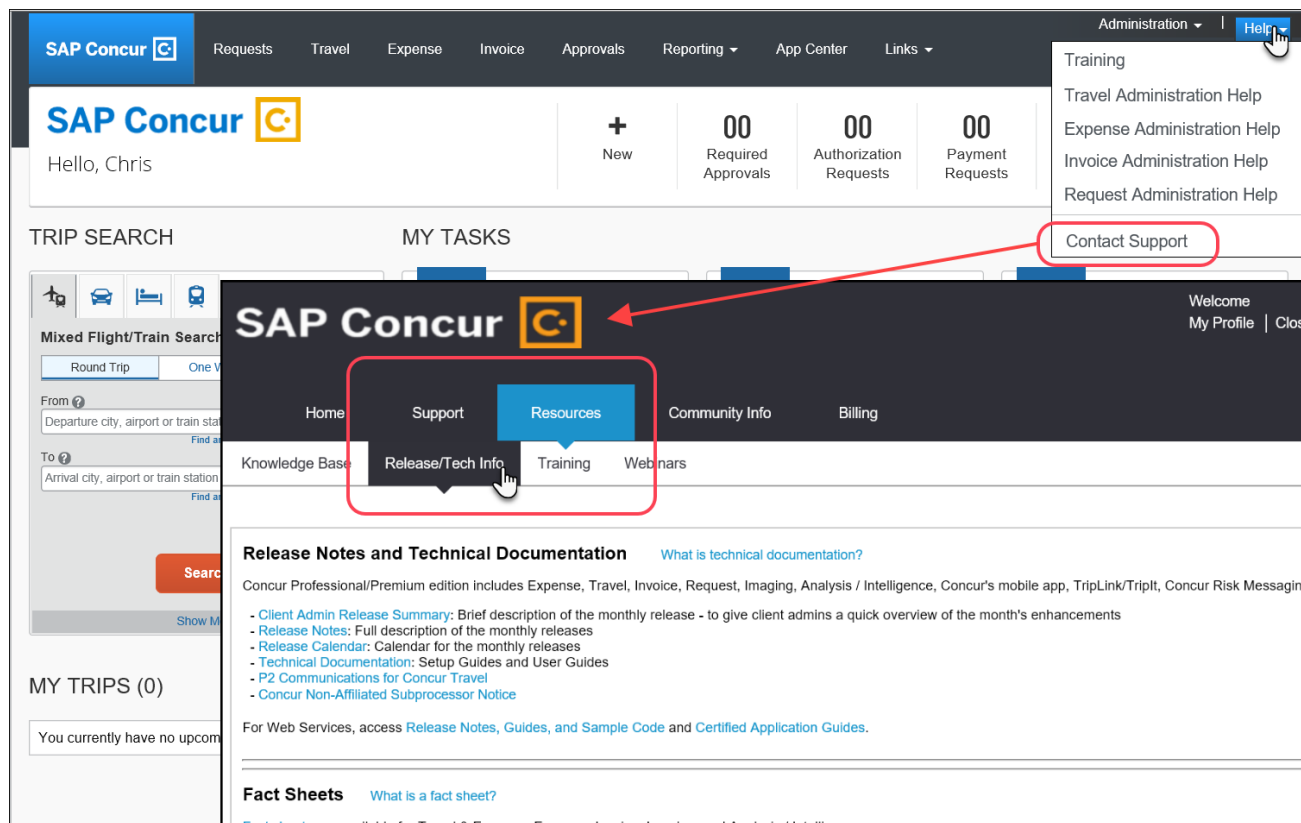
Expense Setup Guides

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



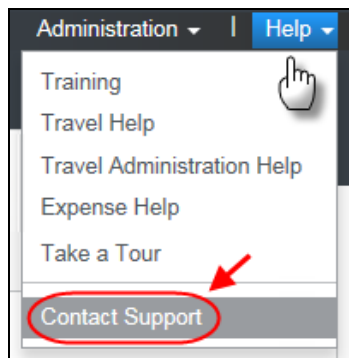
Cases

Steps for Getting a Status

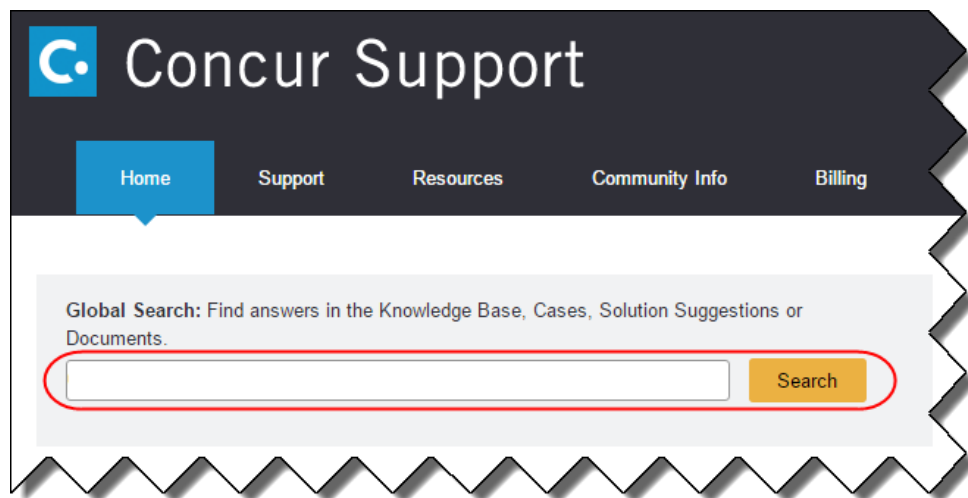
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

May Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11035982	Smart Expenses The transaction amount and exchange rate of the report entry from the credit card did not match the credit card feed. <i>The code has been corrected to prevent future instances of this issue.</i>

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Concur Release Notes	
Expense Professional / Premium	
Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: January 13 2018 Initial Post: Friday, January 12, 1:00 PM PT	Client FINAL

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Release Notes

Admin

Clone Test User

Overview

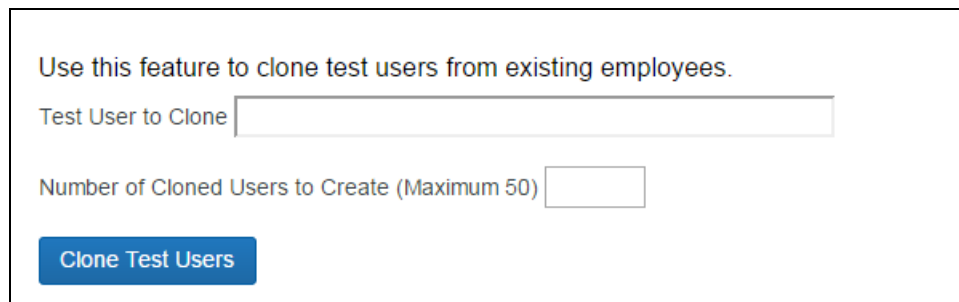
Clients are now able to automate the process of creating test users to test new functionality quicker and more efficiently. To do this, the client can clone an already existing user and thereby create the desired number of test users (up to 50 at a time, 999 in total) to test workflow and new features.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement enables clients to create test users quickly and efficiently, which reduces the time from testing to go live.

What the Administrator Sees

The administrator will see a new section, **Clone Test Users**, on the **Test User Admin** page in Administration.

A screenshot of a web interface for cloning test users. It features a light blue header with the text "Use this feature to clone test users from existing employees." Below this is a form with two input fields: "Test User to Clone" and "Number of Cloned Users to Create (Maximum 50)". A blue button labeled "Clone Test Users" is positioned at the bottom left of the form area.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

Clone Test Users

The administrator may delete test users via employee upload or via an import job.

Configuration/Feature Activation

The administrator will be able to clone test users on the **Test User Admin** page in Administration.

► To clone test users

1. Click **Administration > Expense > Expense Admin**.
2. Click **Test User Admin** (left menu). The **Test User Admin** page appears.

Test User Admin

Test User Setting

Use this feature to allow creation of test users. Test data will be prevented from being included in extract or analytics.

☒ Allow creation and use of test users.

[Save](#) [Cancel](#)

Purge Test User Transactions

Click the button below to remove all test transactional data. No production data will be affected.

[Purge Test User Transactions](#)

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

[Clone Test Users](#)

3. Select (enable) the **Allow creation and use of test users** check box to view the clone test users section.

Test User Admin

Test User Setting

Use this feature to allow creation of test users. Test data will be prevented from being included in extract or analytics.

☒ Allow creation and use of test users

[Save](#) [Cancel](#)

4. In the **Test User to Clone** field, type in the user that you would like to clone. Once you start typing in the user name, the system will search and return a match if one exists.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

[Clone Test Users](#)

5. In the **Number of Cloned Users to Create (Maximum 50)** field, type the number of test users that you would like to use for testing.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

[Clone Test Users](#)

6. Click **Clone Test Users**.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

Clone Test Users

The test users appear in a table below the **Clone Test Users** button.

Use this feature to clone test users from existing employees.

Test User to Clone

Number of Cloned Users to Create (Maximum 50)

Clone Test Users

First Name	Last Name	Login ID	Email Address	Employee ID	Password
Clone	User2	CloneUser2@commasavvy.com	CloneUser2@commasavvy.com	cu2	welcome1
Clone	User3	CloneUser3@commasavvy.com	CloneUser3@commasavvy.com	cu3	welcome1
Clone	User4	CloneUser4@commasavvy.com	CloneUser4@commasavvy.com	cu4	welcome1

These test users will have the same permissions, roles, and groups as the source user from which they were cloned. However, their preferences will not be copied over but instead set to the default preferences.



For more information, refer to the *Shared: Test User Setup Guide*.

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

New Concur Logo

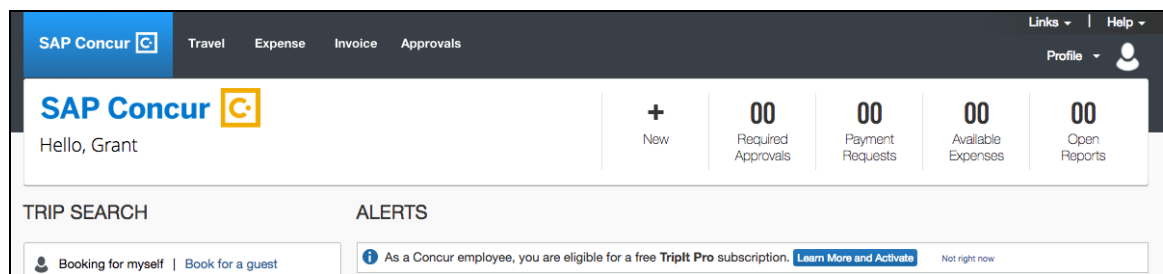
SAP Concur

Overview

In January – on the release date or shortly after – the SAP Concur logo will appear in all Concur products.

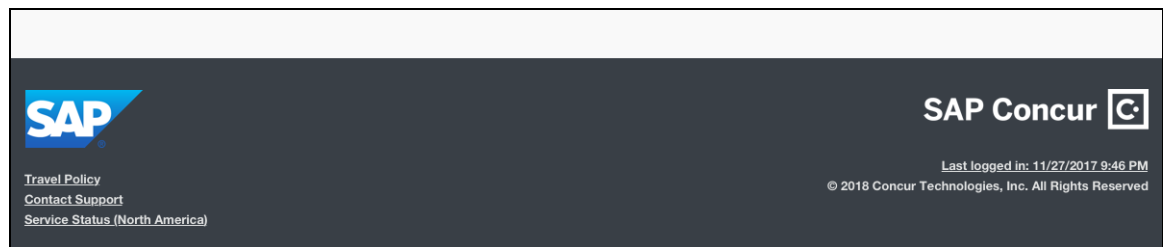
What the User Sees

The new logo will be displayed in the upper-left corner of each page.

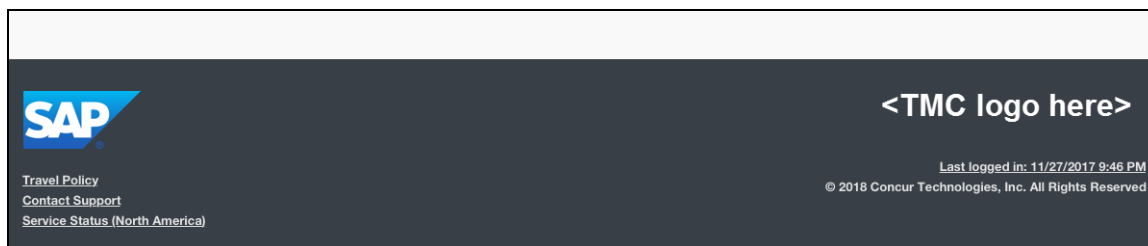


! EXCEPTION: The new SAP Concur logo does not appear *if* the client's logo is displayed in the upper-left corner. The client's logo remains.

Both the SAP and Concur logos appear in the footer.



If a Travel Management Company (TMC) has rebranded in the footer, in addition to the TMC logo, the SAP logo will appear.



Configuration/Feature Activation

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

Travel Allowance

Reinstatement of Recent Changes – Finland

Overview

The following recent changes to the travel allowance feature for Finland that were rolled back as part of the September 2017 release, are reinstated as of the January 2018 release:

- **Change to Rate Location and Allowance Determination** (described in the August 2017 version of these Release Notes)
 - For partial-day trips, less than 24 hours in total, if there is a minimum of 10 hours of consolidated foreign travel, the rate location is determined from the last foreign location visited.
 - For full 24-hour days ending in transit, if the user is leaving a foreign country to Finland, the rate location is determined from that foreign country. Instead, if user is leaving Finland to a foreign country, the rate location is determined from that foreign country. In this case, the direction of travel does not matter as long as it is a mixed-trip combination of foreign and domestic travel.
 - For each day in a multi-day trip, if there is a minimum of 10 hours of consolidated foreign travel, the rate location is determined from the last foreign location visited.
- **Per Diem Location Based on 24-Hour Day** (described in the February 2017 version of these Release Notes)
 - Finland's calculations for the 24-hour "per diem" rate is now based on the location of the traveler exactly 24 hours following their departure. This change accommodates new legal regulations, and retires the standard end of calendar day calculation. (11:59:59 P.M. end of day). Now, if a traveler departs for a trip at 8:00 A.M., their calculated per

diem rate is based on their location at 7:59:59 A.M. the next day, or 24 hours following departure.

BUSINESS PURPOSE/CLIENT BENEFIT

These changes allow Concur clients who do business in Finland to maintain best-practice legal compliance and bring Expense and the traveler into compliance with Finland's revised per diem calculation mandate.

Configuration/Feature Activation

To enable these changes, you must enable the **Use End Of 24 Hour Day Scenarios** calculation property.

► **To enable the Use End Of 24 Hour Day Scenarios calculation property**

7. Log in to Concur as an Admin.
8. Click **Administration / Expense / Travel Allowance / Calculation Properties** (tab).

Travel Allowance

Configurations Employee-Related Configurations Rates Configuration Sets Itinerary Search Calculation Properties

Calculation Method: Finnish Rules

Modify

Name	Label	Type	Value
domestic_provided_meals_factor	Domestic Provided Meals Factor (percent)	edit	50
international_provided_meals_factor	International Provided Meals Factor (percent)	edit	50
trip_duration_hours	Trip Duration Hours (integer between 0 and 23)	edit	10
trip_duration_min_hours	Trip Duration Minimum Hours (integer between 0 and 23)	edit	6
use_end_of_24hour_day_scenarios	Use End Of 24 Hour Day Scenarios	edit	Y

9. From the Calculation Method list, select Finnish Rules.
10. Select **Use End Of 24 Hour Day Scenarios**.
11. Click **Modify**.
12. In the **Value** field, enter Y.
13. Click **Save**.

USB IC Card Readers – Japan

No Longer Supported

Overview

As mentioned in the December 2017 version of these release notes, the USB IC Card reader solution for capturing Japanese IC Card travel information in Expense utilized a reader connected to a single computer.

Important dates:

- On **August 1, 2017**, Concur discontinued support for this solution.
- As of **December 31, 2017**, the solution is retired and will no longer work in Concur.

! IMPORTANT: After December 31st, users will not be able to import via the USB IC Card Reader as **Read Card** (button) will be disabled. The **IC Card** button will still be available if there are entries left in the system, which have been read-in before December 31st. The **IC Card** button will disappear if there are no entries left in the system.

As a replacement, Concur's current solution uses a Network IC Card Reader, which our Japanese clients are already deploying. The Network IC Card Reader has the benefit of allowing multiple users to import transactions at a central location.



For the Network IC Card Reader release note, refer to the October 2016 version of this document.

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement keeps Concur users aligned with current technology.

Configuration/Feature Activation

Concur automatically retired this solution and discontinued support for it. To use the replacement Network IC Card Reader solution, contact your Concur Client Executive. The current solution requires a small implementation project and the purchase and installation of IC card readers from a specific manufacturer.



For general information about Concur's use of IC card readers, refer to *Expense: Japan Public Transportation Setup Guide* and *Expense: Japan Public Transportation User Guide*.

Planned Changes

The items in this section are targeted for future releases. Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Discontinue Privacy Agreement, Customization, and Policy**

Overview

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Available Expenses

****Planned Changes** New One-Year Filter**

Currently additional design work is being done for this feature, which incorporates client feedback. In February, Concur plans to provide details about the revised design.

Overview

The **Available Expenses** list on the **Manage Expense** page will soon no longer display expenses older than one year.

BUSINESS PURPOSE/CLIENT BENEFIT

This new feature automatically filters expenses with transaction dates older than one year and only displays expenses added within the past 12 months, to provide an easier end user experience. This change is consistent with behavior in the **Available Receipts** sections (where unused receipts older than one year are hidden) and will result in improved performance by reducing the volume of old, unneeded data.

Configuration/Feature Activation

Concur will automatically implement this change; there will be no configuration or activation steps.

Budget

****Planned Change** New Budget Feature in Early Adopter Program**

This feature is available to Early Adopter clients only. Budget will be a phased release starting in March with availability to all clients targeted in Q2.

Overview

The Budget feature enables clients to set up all components of a budget; a fiscal year to determine the budget period, budget tracking fields to track spending on a cost center (profit center) level, budget categories to group expense types for budget purposes and budgets, which are the actual annual budgets, and Budget Items, which define the budget including fiscal year, budget owner, budget name and description.

This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense (reports).

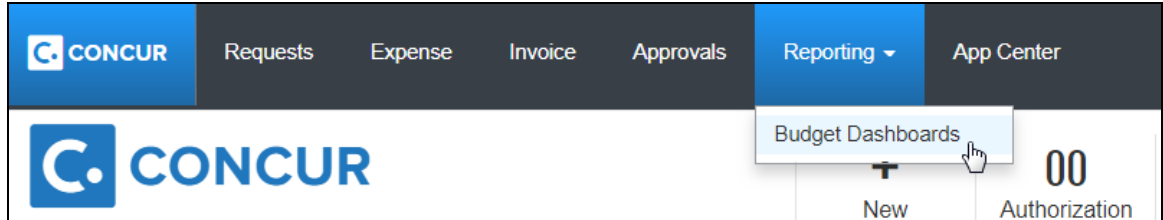
NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget feature share data between both calendars.

BUSINESS PURPOSE/CLIENT BENEFIT

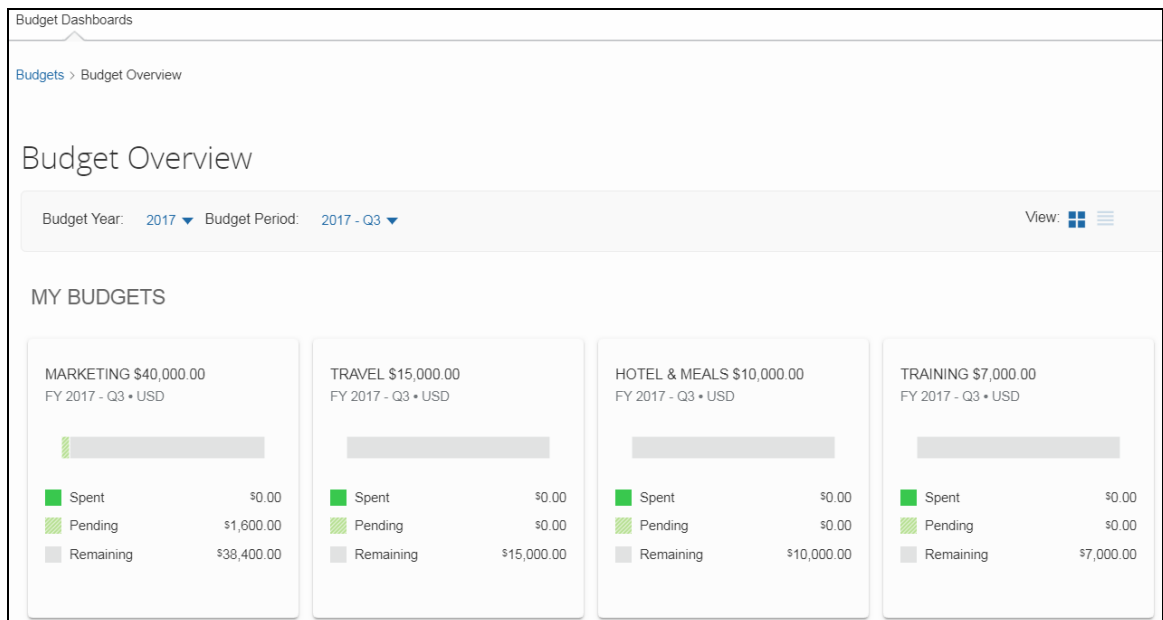
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

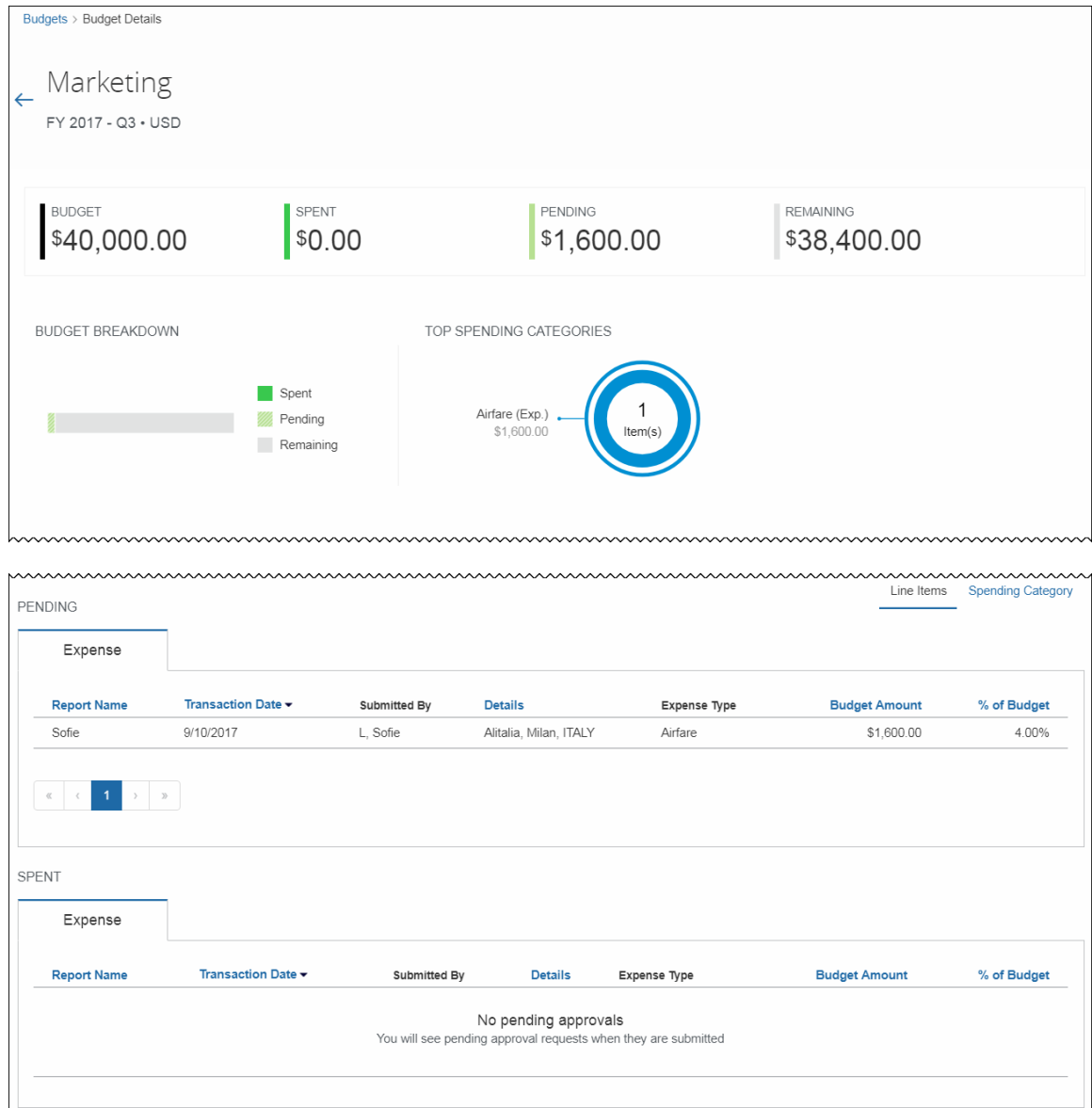
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.



Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



Clicking on one of the budget will show details about that budget.



What the Admin Sees

The admin will see a new menu, **Budget Configuration**, in Expense Admin. The Budget Configuration page contains five tabs: **Budget Items**, **Fiscal Calendar**, **Budget Category**, **Budget Tracking Fields**, and **Budget Settings**.

NOTE: To access the **Budget Settings** tab, users need to have the Budget Administrator role.

Budget Items tab:

Budget Configuration

Budget Items | Fiscal Calendar | Budget Category | Budget Tracking Fields | Budget Settings

New | Modify | Remove | Import

Budget Name ▲	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
Company01	2017	John Last	Company Travel ...	\$120,000.00	USD
Company02	2017	John Last	Company IT Budget	\$60,000.00	USD

Page 1 of 1 | Displaying 1 - 21 of 21

Fiscal Calendar tab:

Budget Configuration

Budget Items | **Fiscal Calendar** | Budget Category | Budget Tracking Fields | Budget Settings

New | Modify | Activate | Deactivate | Remove

☐ Fiscal Year	Start Date ▼	End Date	Active
☐ 2019	01/01/2019	12/31/2019	Yes
☐ 2018	01/01/2018	12/31/2018	Yes
☐ 2017	01/01/2017	12/31/2017	Yes

Budget Category tab:

Budget Configuration

Budget Items | Fiscal Calendar | **Budget Category** | Budget Tracking Fields | Budget Settings

New | Modify | Remove

Budget Category ▲	(Invoice) Expense Types	(Expense) Expense Types
IT	Software Cellular Telephone Telecommunication Equipment Internet Telecommunication Services Computing Equipment	Long Distance Local Phone Cellular Phone
Marketing	Marketing Trade Show	Misc. Promotional Expense Trade Shows
Travel	Travel Conference/Seminar Fees	Company Car Mileage Fixed Meals (gross) Limousine Company Car Wash Subway Company Car Oil Fixed Meals Room Tax Gas

Page 1 of 1 | Displaying 1 - 3 of 3

Budget Tracking Fields tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[Budget Fields](#)
[Budget Field Mapping](#)

[New Field](#)
[New Connected Field](#)
[Modify](#)
[Remove](#)
[Save Sequence](#)

☐ Budget Tracking Field	Field Type	List	Sequence ▲
☐ Department Function	Connected List	Function	↓
☐ Region Country	Connected List	Geography	↓ ↑
☐ Product Group Product	Connected List	Product	↓ ↑

Budget Settings tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[Save](#)
[Cancel](#)

Time Zone:

Alert Limit Percent:

Control Limit Percent:

Send alert limit notifications: ☒

Send control limit notifications: ☒

Alternative Manager:

Include Pending: ☐

Disable Budget Tracking Mapping Field Type filter: ☐

Enable Expense: ☒

Enable Purchase Request: ☒

Enable Payment Request: ☒

Configuration/Feature Activation

Concur needs to activate this features in a Concur internal-only tool.

Once Concur has activated the Budget feature, the Budget Administrator needs to configure the feature in the Budget Configuration tool in Expense Admin.

Legacy Expense Authorization Request

****Planned Changes** Product Retirement (*March 2018*)**

Overview

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018.

Concur offered this feature to some clients prior to the existence of the standalone Concur Request product. We now have feature parity as well as enhanced features and full support on the standalone Request product. Clients that wish to leverage a request capability within Concur should purchase and migrate to the Concur Request product.

A client-facing FAQ is available: http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement allows Concur to focus development resources on further enhancements to our standalone Concur Request product whose functionality, innovation, and value now exceeds that of our legacy feature.

Configuration/Feature Activation

Concur has already initiated communication with clients who have recently used our legacy Expense Authorization Request feature to plan migrations to our standalone Concur Request product.



For this change, Concur has archived the *Expense: Authorization Requests Setup Guide* and *Expense: Authorization Requests User Guide*.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.

The screenshot displays the Concur Expense Administration Help interface. At the top, the navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The main header shows the Concur logo, a user greeting 'Hello, Terry', and summary statistics: 61 New Authorization Requests, 08 Purchase Requests, and 696 Payment Requests. A dropdown menu for 'Help' is open, listing various help topics, with 'Expense Administration Help' highlighted. Below this, the 'Resources for Administrators - Professional Edition' page is shown, featuring a sidebar with links like 'Using Online Help', 'Legal Notice', and 'Resources for Administrators - Professional Edition' (which is circled in red). The main content area lists various resources, including 'What's New - Professional Edition', 'Client Fact Sheets', and 'User Interface Icons'. A second screenshot below shows the 'Expense Professional Administration' page, with a sidebar where 'Expense Professional Administration Guides' is circled in red. The main content area displays a table of guides.

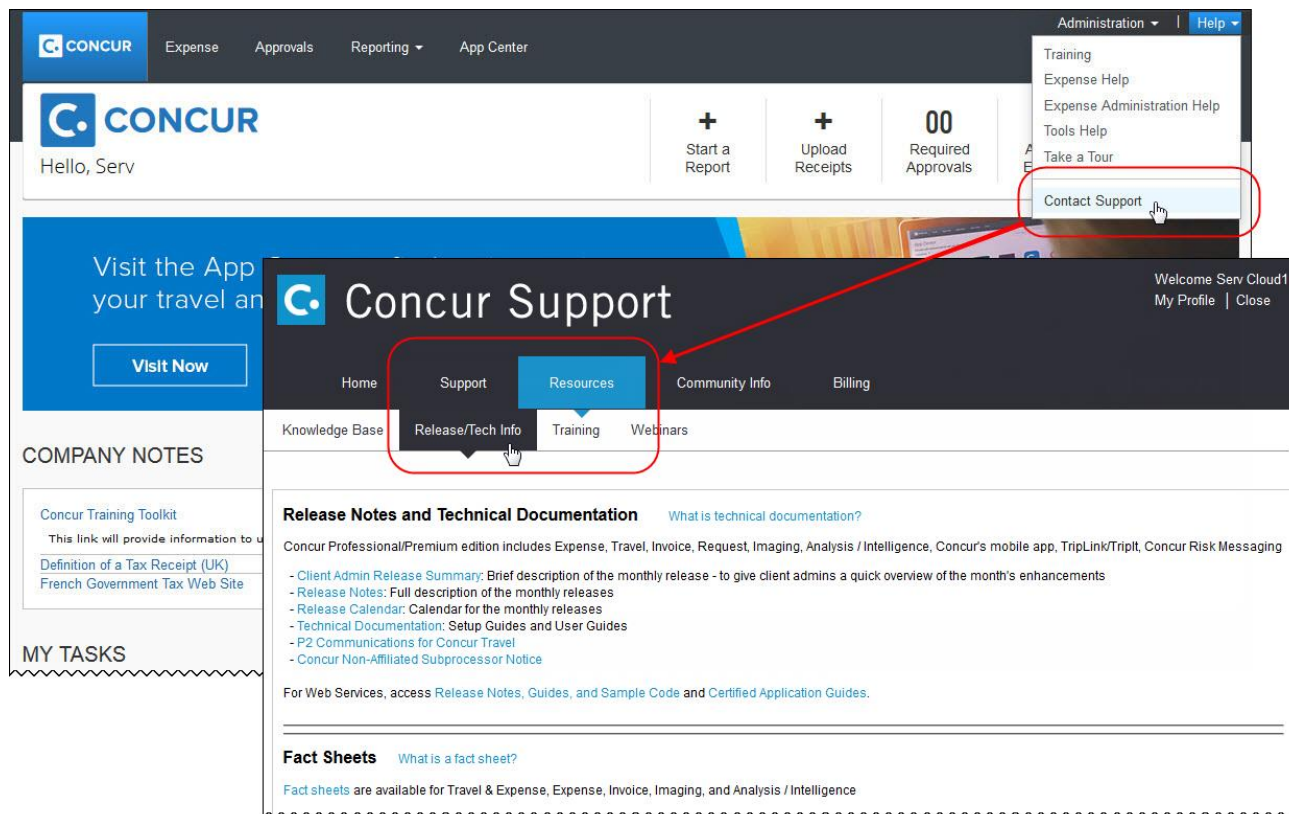
Expense Setup Guides (English Only)	Format (English Only)
Account Codes	PDF
Allocations	PDF
Attendees	PDF
Audit Rules	PDF
Audit Rules (Validation Rules)	PDF
Budget Insight	PDF
Car Configuration	PDF
Cash Advance	PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

Additional Release Notes and Other Technical Documentation: Concur Support Portal – Selected Users

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



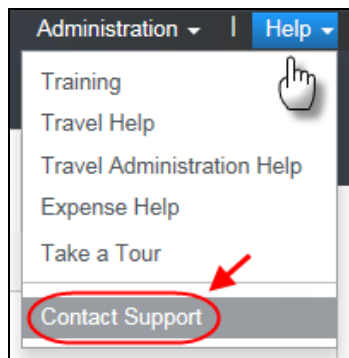
Cases

Steps for Getting a Status

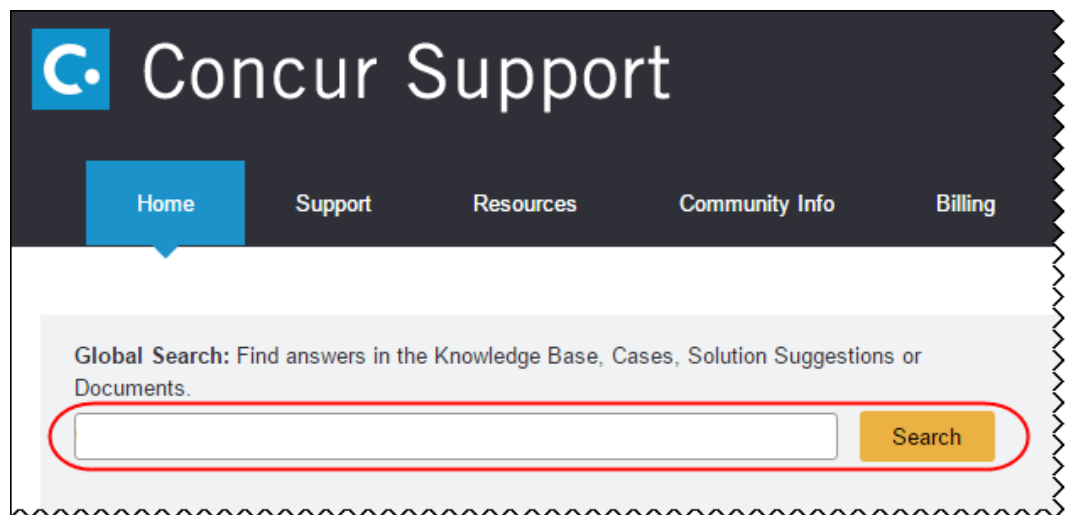
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
2. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the Concur system internally. Please contact your internal support desk for assistance.

3. Enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

January Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
10406146	Global Pay No details were available in Administration > Company > Tools > Monitor Batches - View Funding > Global Funding when the batch type was Cash Advance. <i>Concur has corrected the code and now details display for Cash Advance batches.</i>

Concur Release Notes	
Expense Professional / Premium	
Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: February 10 2018 Update #1: Tuesday, February 20, 3:00 PM PT	Client FINAL

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Release Notes

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

All companies must take all reasonable steps to protect the personal and sensitive information of their employees. As per recommended security-related best practices, remember that custom fields should not contain personal and sensitive data.

! IMPORTANT: Data in custom fields is not encrypted. The client is solely responsible for any liability resulting or arising from improper use.

If your company is currently using custom fields to store personal or sensitive data (for example, Social Security numbers, family member names, or any other personally identifying information), you should plan to remove this information from your existing fields within the service and modify your current configuration.

Next Steps

For information about your configuration and the use of custom fields, contact Concur Client Support or your Account Manager.

Budget

New Budget Feature in Early Adopter Program

This feature is available to Early Adopter clients only. Budget will be a phased release starting in March with availability to all clients targeted in Q2.

Overview

The Budget feature enables clients to set up all components of a budget; a fiscal year to determine the budget period, budget tracking fields to track spending on a cost center (profit center) level, budget categories to group expense types for budget purposes and budgets, which are the actual annual budgets, and Budget Items, which define the budget including fiscal year, budget owner, budget name and description.

This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense.

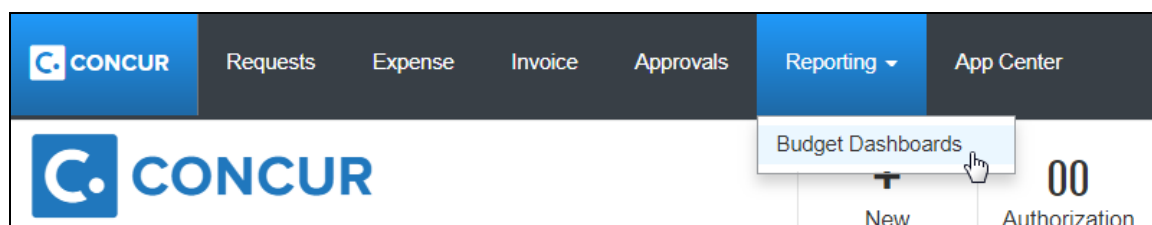
NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget feature share data between both calendars.

BUSINESS PURPOSE/CLIENT BENEFIT

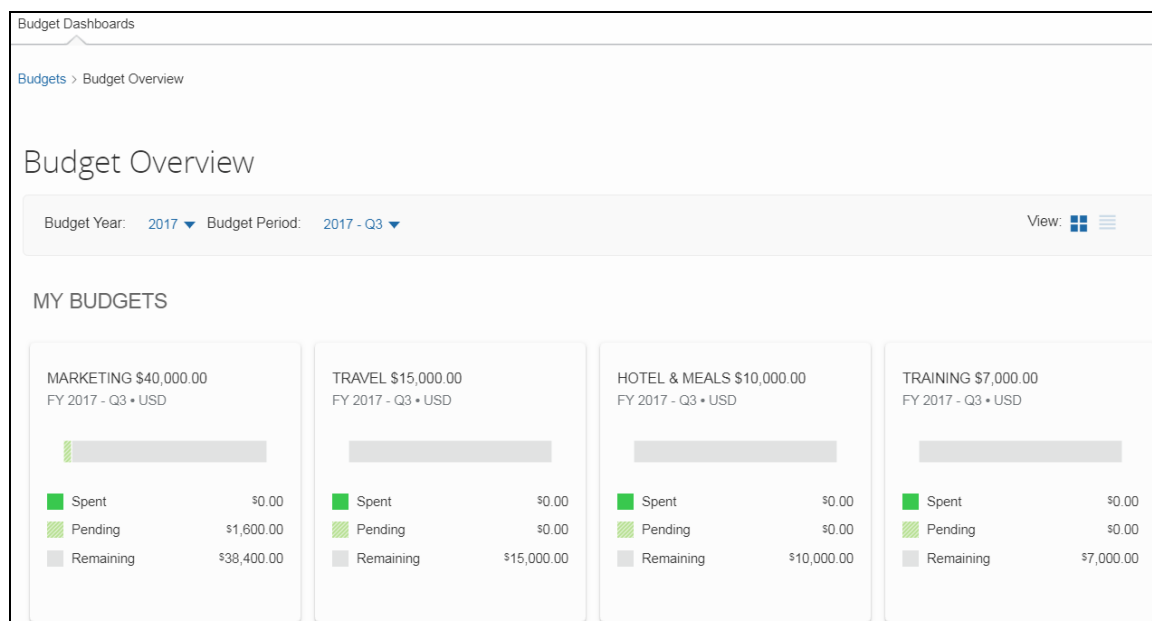
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

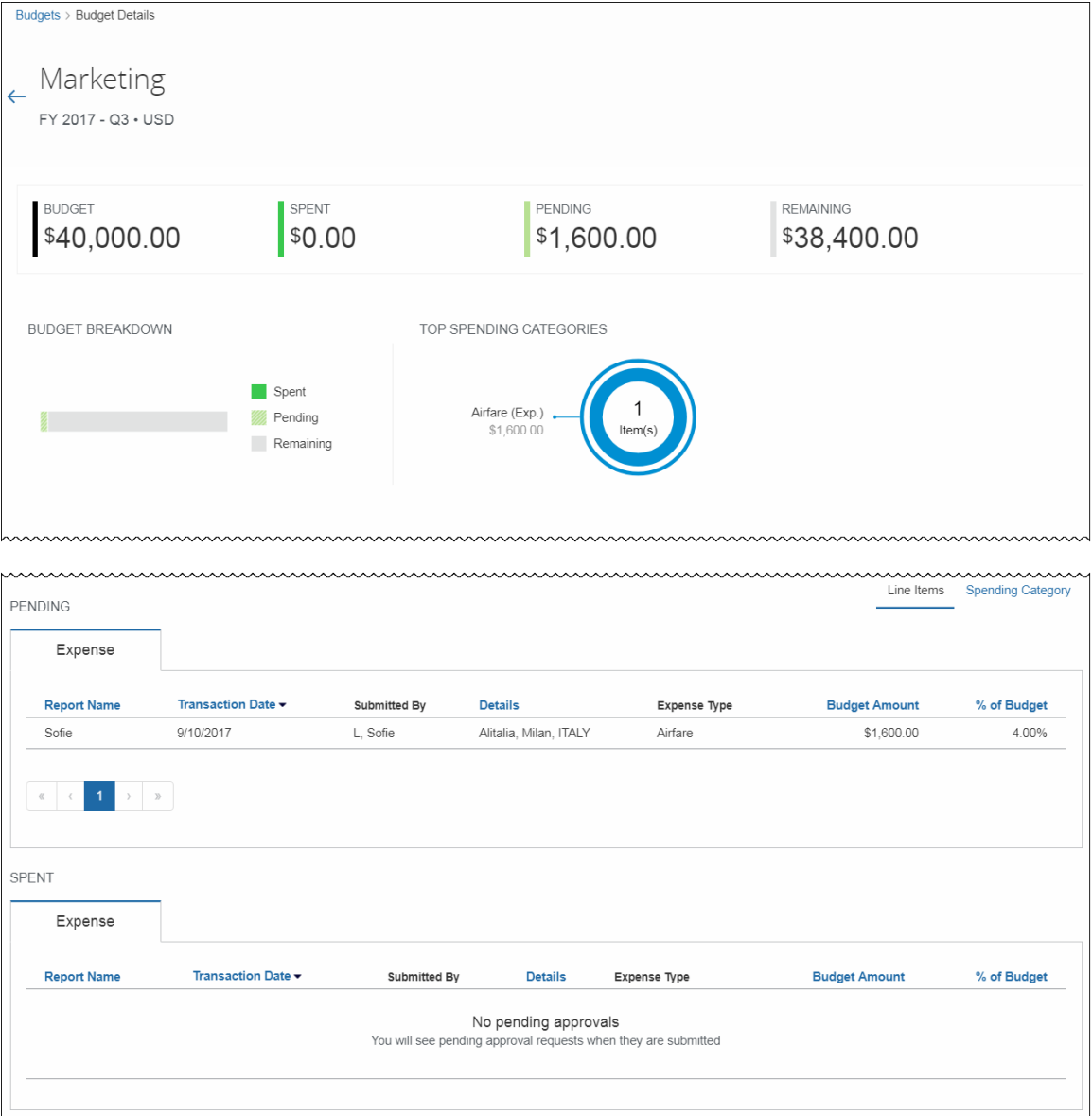
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.



Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



Clicking on one of the budget will show details about that budget.



PENDING

Line Items

Spending Category

Expense

Report Name	Transaction Date	Submitted By	Details	Expense Type	Budget Amount	% of Budget
Sofie	9/10/2017	L, Sofie	Alitalia, Milan, ITALY	Airfare	\$1,600.00	4.00%

«

<

1

>

»

SPENT

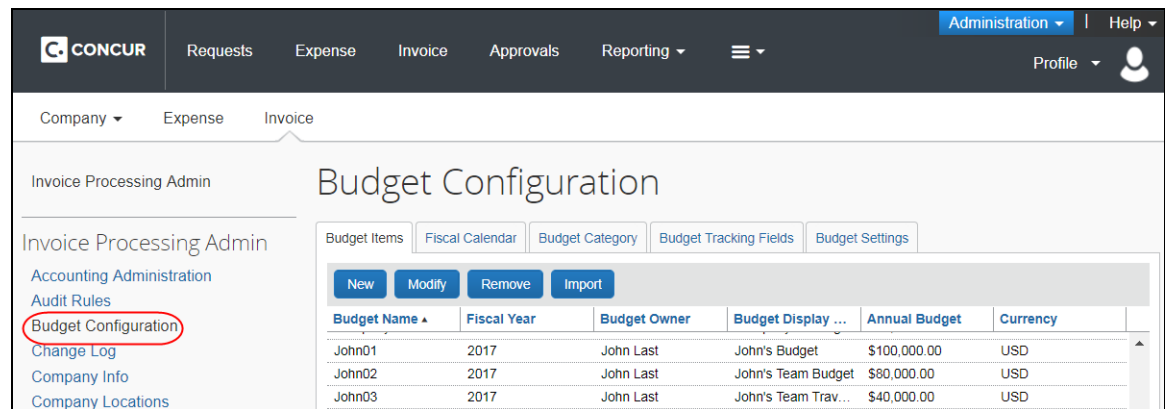
Expense

Report Name	Transaction Date	Submitted By	Details	Expense Type	Budget Amount	% of Budget
No pending approvals						
You will see pending approval requests when they are submitted						

What the Admin Sees

The admin will see a new menu, **Budget Configuration**, in Expense Admin. The Budget Configuration page contains five tabs: **Budget Items**, **Fiscal Calendar**, **Budget Category**, **Budget Tracking Fields**, and **Budget Settings**.

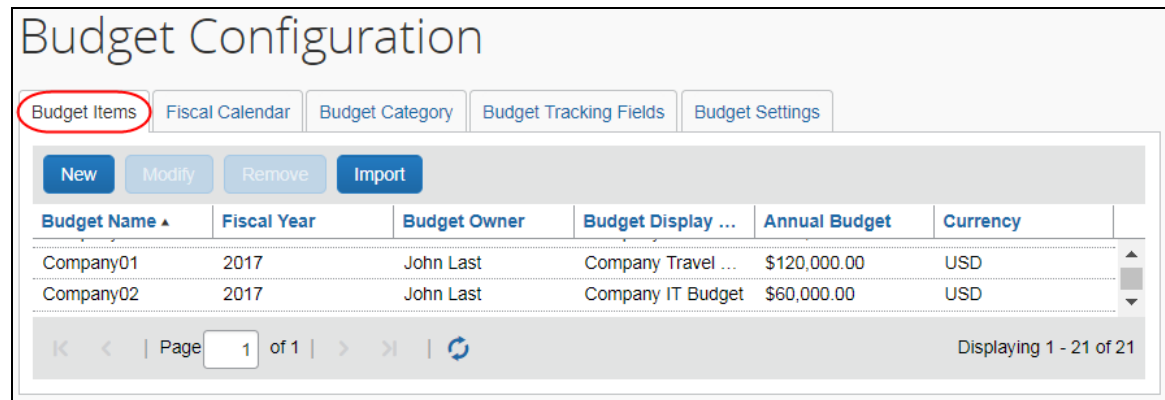
NOTE: To access the **Budget Settings** tab, users need to have the Budget Administrator role.



Concur Budget Configuration page. The 'Budget Configuration' tab is highlighted in the left sidebar. The main content area shows the 'Budget Items' tab with a table of budget items.

Budget Name	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
John01	2017	John Last	John's Budget	\$100,000.00	USD
John02	2017	John Last	John's Team Budget	\$80,000.00	USD
John03	2017	John Last	John's Team Trav...	\$40,000.00	USD

Budget Items tab:

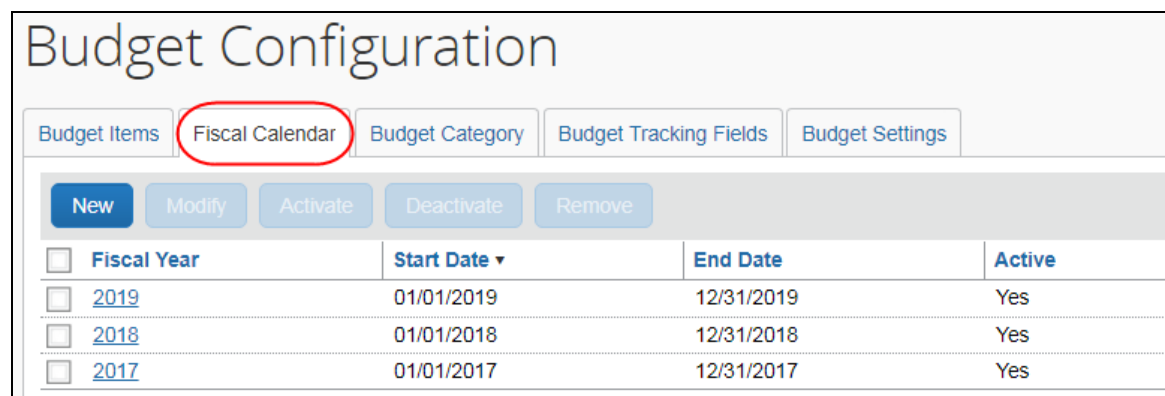


Concur Budget Configuration page, 'Budget Items' tab. The 'Budget Items' tab is highlighted in the left sidebar. The main content area shows a table of budget items with pagination.

Budget Name	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
Company01	2017	John Last	Company Travel ...	\$120,000.00	USD
Company02	2017	John Last	Company IT Budget	\$60,000.00	USD

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Fiscal Calendar tab:



Concur Budget Configuration page, 'Fiscal Calendar' tab. The 'Fiscal Calendar' tab is highlighted in the left sidebar. The main content area shows a table of fiscal years with start and end dates.

Fiscal Year	Start Date	End Date	Active
☐ 2019	01/01/2019	12/31/2019	Yes
☐ 2018	01/01/2018	12/31/2018	Yes
☐ 2017	01/01/2017	12/31/2017	Yes

Budget Category tab:

Budget Configuration

Budget Items Fiscal Calendar **Budget Category** Budget Tracking Fields Budget Settings

New Modify Remove

Budget Category ▲	(Invoice) Expense Types	(Expense) Expense Types
IT	Software Cellular Telephone Telecommunication Equipment Internet Telecommunication Services Computing Equipment	Long Distance Local Phone Cellular Phone
Marketing	Marketing Trade Show	Misc. Promotional Expense Trade Shows
Travel	Travel Conference/Seminar Fees	Company Car Mileage Fixed Meals (gross) Limousine Company Car Wash Subway Company Car Oil Fixed Meals Room Tax Gas

Page 1 of 1 | < > | Refresh

Displaying 1 - 3 of 3

Budget Tracking Fields tab:

Budget Configuration

Budget Items Fiscal Calendar Budget Category **Budget Tracking Fields** Budget Settings

Budget Fields Budget Field Mapping

New Field New Connected Field Modify Remove Save Sequence

☐ Budget Tracking Field	Field Type	List	Sequence ▲
☐ Department Function	Connected List	Function	↓
☐ Region Country	Connected List	Geography	↓ ↑
☐ Product Group Product	Connected List	Product	↓ ↑

Budget Settings tab:

Budget Configuration

Budget Items | Fiscal Calendar | Budget Category | Budget Tracking Fields | **Budget Settings**

Save Cancel

Time Zone: GMT-08:00

Alert Limit Percent: 80

Control Limit Percent: 100

Send alert limit notifications: ☒

Send control limit notifications: ☒

Alternative Manager: Travel Manager

Include Pending: ☐

Disable Budget Tracking Mapping Field Type filter: ☐

Enable Expense: ☒

Enable Purchase Request: ☒

Enable Payment Request: ☒

Configuration/Feature Activation

Concur needs to activate this features in a Concur internal-only tool.

Once Concur has activated the Budget feature, the Budget Administrator needs to configure the feature in the Budget Configuration tool in Expense Admin.



For more information, refer to the *Shared: Budget Setup Guide*, the *Shared: Budget Item Import User Guide*, the *Budget Client Fact Sheet*, and the *Budget FAQ*.

Company Card

New Fields for Japan Credit Bureau Import Format

Overview

With this release, the Japan Credit Bureau (JCB) card import can now capture additional data included in overseas transactions. This is useful for clients who want to use these fields in their workflow and accounting extract configurations to capture this transaction data for their financial systems.

These fields include:

- **Merchant Country Code**
- **Merchant State**
- **Merchant City**

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement benefits the Concur Japan market by allowing Expense to capture additional data found in overseas transactions.

Configuration/Feature Activation

Japan Credit Bureau (JCB) will support this feature from April 2018. Clients who want to enable this feature will need to contact their Account Manager or Sales Executive for assistance. Please note that it generally takes 3 months from application to begin receiving the card feed from JCB.

Concur Salesforce Connector

Version 1.113 Supports Lightning

Overview

The Concur Salesforce Connector, version 1.113, supports the Lightning edition of Salesforce.

BUSINESS PURPOSE/CLIENT BENEFIT

This change allows Concur Salesforce Connector clients to take advantage of the Lightning edition of Salesforce.

Configuration/Feature Activation

Concur automatically implemented this change with version 1.113; however, some Concur integration steps are different with Lightning compared to previous editions of Salesforce.

To upgrade your version of the Concur Salesforce Connector, contact Concur Client Support.



For more information, refer to the *Shared: Concur Salesforce Connector Setup Guide*.

Expense Pay – Global

New Message for Incomplete Banking Profiles (USD)

Overview

For Expense Pay – Global clients who have an open batch in United States Dollars (USD), a warning will display if the batch contains a disbursement to a user who has an incomplete banking profile, for example they have not yet authorized direct deposit.

BUSINESS PURPOSE/CLIENT BENEFIT

This message helps prevent delays in successful processing of payments.

What the Admin (or User or Implementation) Sees

When applicable, the **View Batches** tab of the **Monitor Batches** page displays a new column, **Warnings**, and the message, **"Incomplete Banking Profile."**

Example

Monitor Batches									
View Batches View Funding Bank Statements									
Advanced Search Payment Demands For Batch Total: 130.00 USD X									
Search Field: Search Value: Status: Paid Date (From): Paid Date (To): Employee Last Name Any Search									
US Batch: Employees Batch Paid By Expense Pay By Concur (c51bbb09-0f)									
Report Name	Report ID	Payment Demand ID	Payee Name	Amount	Payee Bank ID	Payee Account Number	Paid Date	Status	Warnings
Other Test	A5841031E9404C5B929B ...	100002	EPUser1_root, Sam1	110.00 USD	091000019	XXXXXX2345		Assigned	
Test 2	58AC8362966849B190B9 ...	100001	EPManger_1101, Sam	20.00 USD	091000019	XXXXXX2345		Assigned	Incomplete Banking Profile: Banking Use Requirements not a

Configuration/Feature Activation

Concur automatically implemented this change; there are no configuration or activation steps.



For this change, Concur has updated the *Expense: Payment Manager for Expense Pay Global User Guide*.

Spend Categories

Airline Fees and Goodwill Spend Categories Removed

Overview

With this release, Concur has removed the *Airline Fees* and *Goodwill* spend categories from the **Spend Category** list on the **Expense Types** page (**Administration > Expense > Expense Types** (left menu)). These two spend categories are no longer available for selection. Instead, clients should use the *Donations* and *Booking Fee* spend categories.

NOTE: If an existing expense type is currently assigned to the *Airline Fees* or *Goodwill* spend category, the expense type will continue being assigned to that spend category.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement cleans up the list of spend categories.

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

Planned Changes

The items in this section are targeted for future releases. Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Opt Out of In-Product Messaging (United States)**

Overview

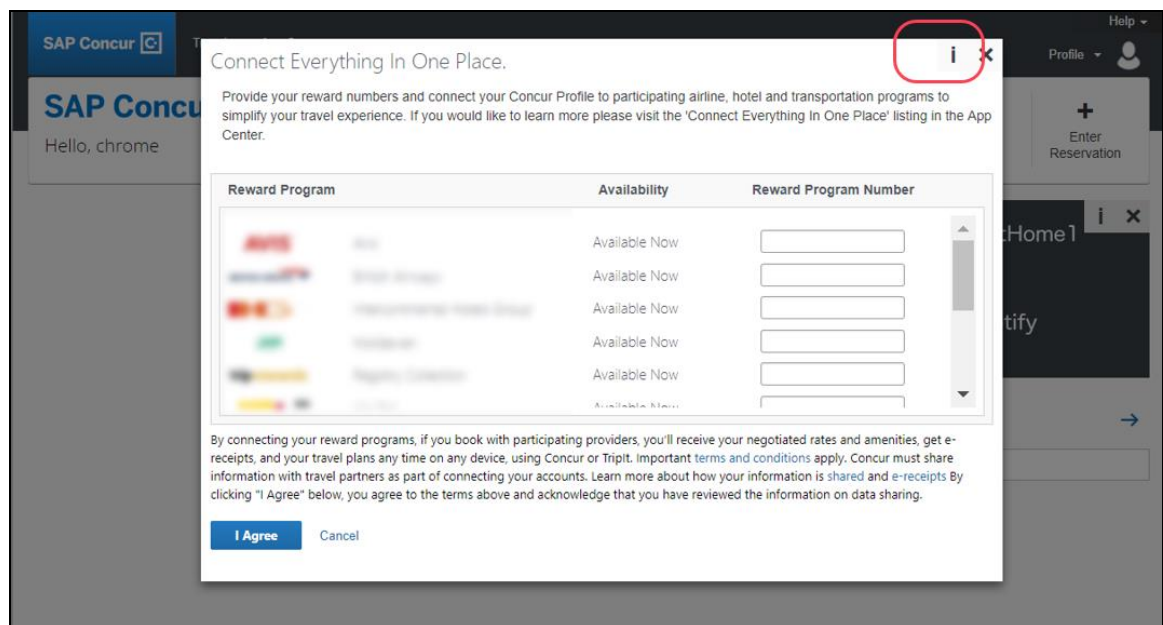
Last year, when in-product messaging was introduced in Europe, the feature included the ability for users to opt out of messaging.

Targeted for the March release, Concur will provide customers in the United States the ability to opt out.

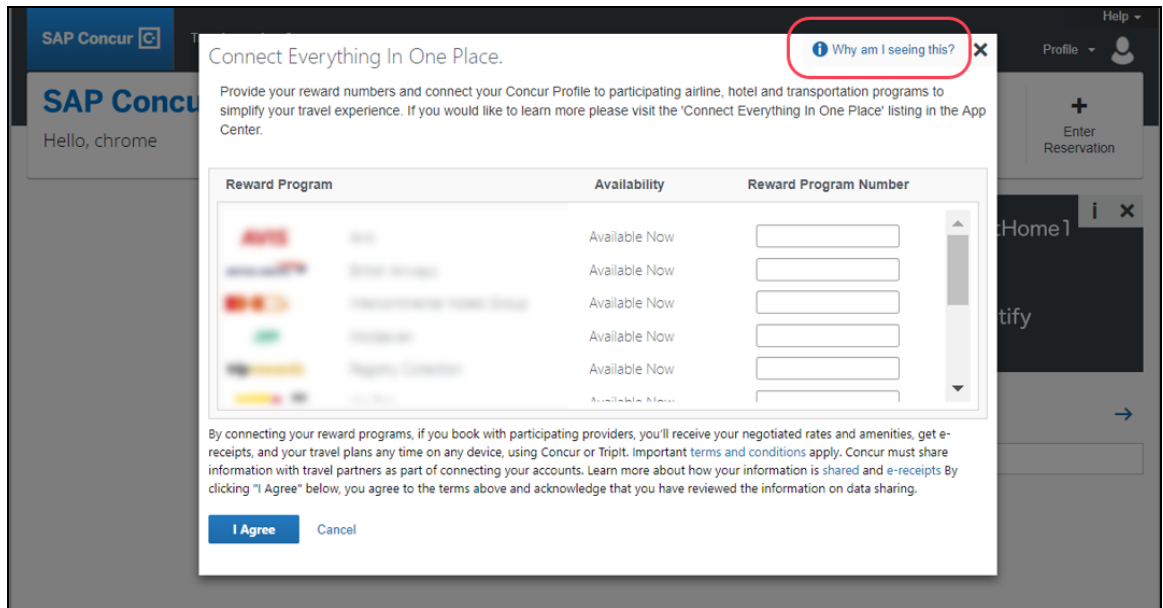
What the User Sees

MESSAGES

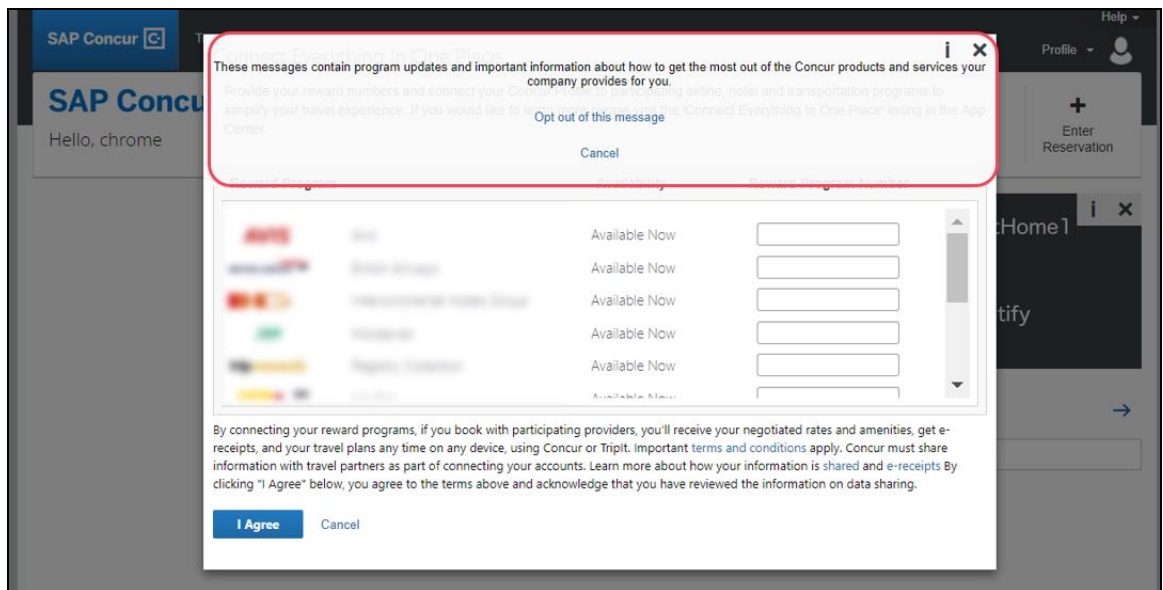
An information icon appears in the upper-right corner of the message.



When the user clicks it or hovers the mouse pointer over it, the *Why am I seeing this?* message appears.



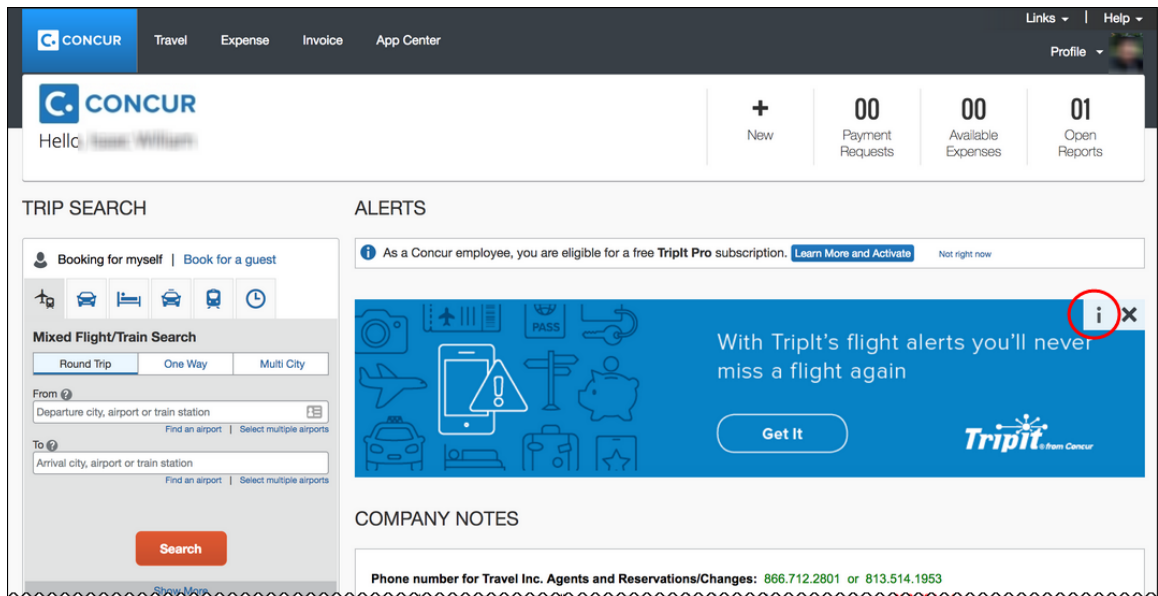
When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other categories.



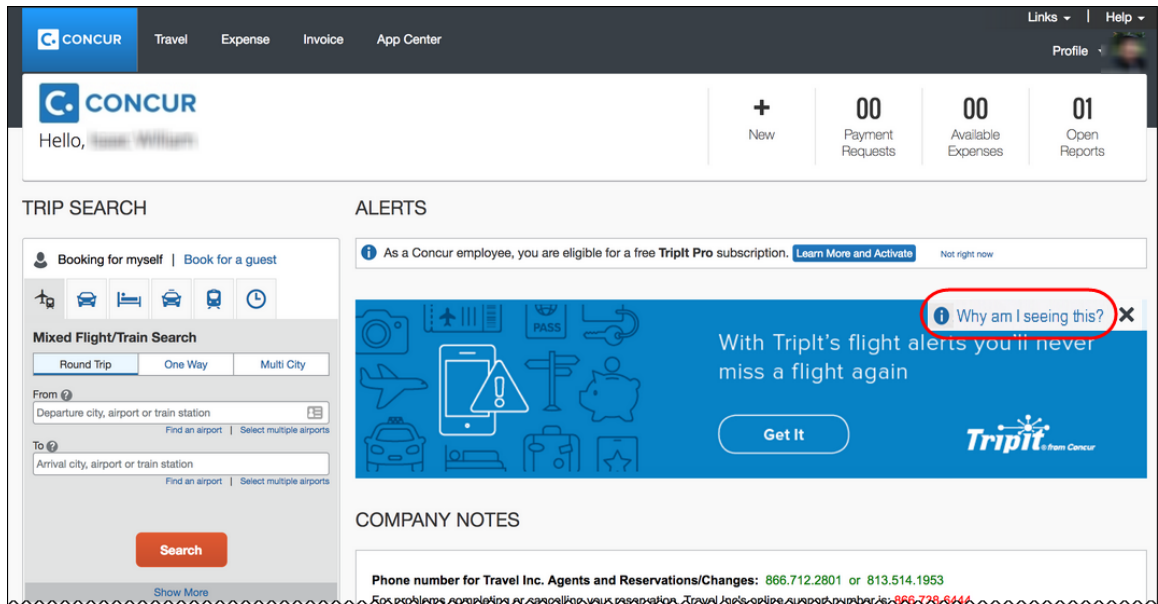
When the user clicks the close button (X in the upper-right corner), the window closes.

IN-PAGE MESSAGES

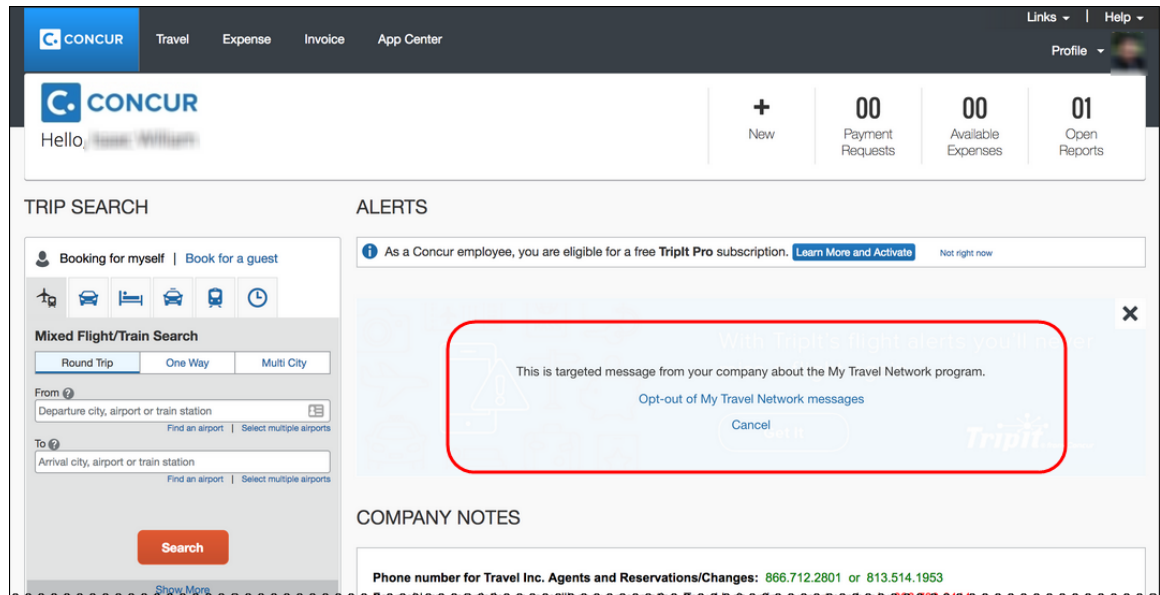
An information icon appears in the upper-right corner of the message.



When the user clicks it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this message as well as a link for the user to click to opt out of seeing similar messages in the future. The user could still be shown IPM relating to other categories.



When the user clicks the close button (X in the upper-right corner), the message collapses and is removed from the page entirely.

Configuration / Feature Activation

Concur will automatically implement this change; there will be no additional configuration or activation steps.

****Planned Changes** Removing the "Privacy Agreement" Page**

Overview

For clients who currently display the **Privacy Agreement** page to users, be aware that on **April 14, 2018**, Concur will eliminate that page. That means, the privacy agreement will no longer display, under any circumstances. In addition, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

In a separate release, Concur will provide a standard privacy statement, which can be accessed via a link in the page footer.

This release note discusses the removal of the **Privacy Agreement** page and its associated configuration options. Information about the new Concur privacy statement will be provided in future release notes.

The intent of the change is to ensure that all customers see the same unmodified Concur privacy statement.

FAQs

Q. Why can't I continue using this feature?

A. Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within Concur services.

Q. When will the existing **Privacy Agreement** page be removed?

A. On April 14, 2018, the page will be removed; users will no longer see the privacy agreement – whether customized or generic.

Between now and April 14, if you want to remove your customized privacy agreement from the **Privacy Agreement** page, you can. For clients who have access to the custom text option or the privacy agreement settings, you can make those changes yourself. For clients who do not have access to the custom text option or the privacy agreement settings, you can contact Concur Client Support for assistance.

No action is necessary. You do not have to make changes now unless you want to.

Q. What will Concur provide in place of the current **Privacy Agreement** page?

A. Some clients have used the **Privacy Agreement** page to convey company-specific information to its users. That option will no longer be available. Instead, the Concur privacy statement – accessible via a link the page footer – will describe Concur's processing activities of customer data.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Clients must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. When the new Concur privacy statement is implemented; will I be able to modify it or require that users accept it?

A. The Concur privacy statement will not be configurable by clients in any way. Its function is to describe Concur's processing activities of client data.

Q. Who can I contact for more information?

A. You can contact Concur Client Support for additional information regarding these settings and/or Concur's updated privacy statement.

Configuration / Feature Activation

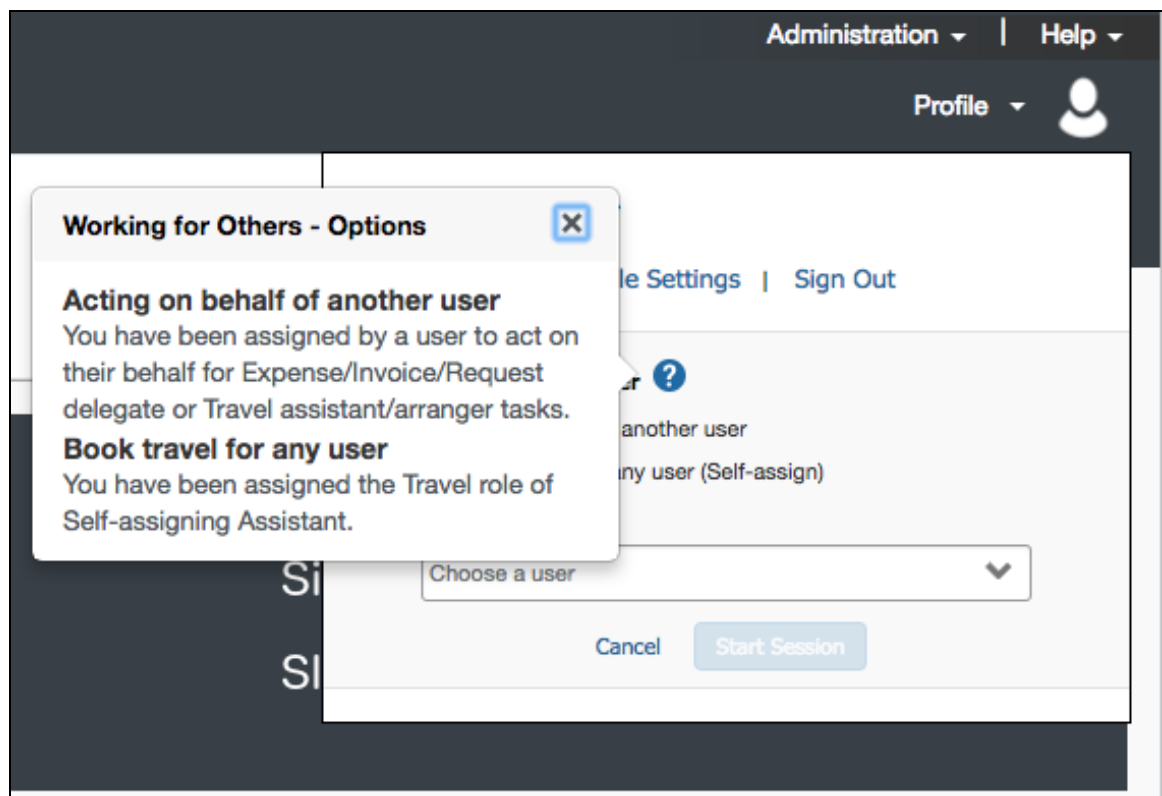
The **Privacy Agreement** page and associated configuration options will be automatically removed. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

Accessibility

****Planned Changes** Keyboard Access for Working for Others Quick Help**

Overview

The **Working for Others** Quick Help contains important information and should be available to everyone. Currently, it is available only by clicking the "?" icon with a mouse. With the March release, the **Working for Others** Quick Help will become accessible via the keyboard.



USER/CUSTOMER BENEFIT

Working for Others Quick Help will be available to mouse users and keyboard users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

****Planned Changes** Alternative Text for the Logo on the Sign In Page**

Overview

In June of 2017, accessibility tests for the June 2017 VPAT identified exceptions to the WCAG 2.0 global standards of the W3. These exceptions are identified issues where the location or action did not adhere to the A or AA standard of specific WCAG 2.0 rules. Resolving this issue improves our accessibility quality on the targeted location or action by aligning it to the appropriate WCAG standard.

Effectively, the issue and resolution is this: Screen readers are a type of assistive technology that audibly reads each screen element (instructional text, fields, options, etc.) to the user. Proper coding (in this case, known as *alternative text* or *alt text*) is required to ensure the reader "reads" the proper information to the user.

The issue is that the logo on the **Sign In** page does not currently have the proper code to read the logo description to the user. In the March release, this issue will be resolved.



USER/CUSTOMER BENEFIT

Enhancing our products and services to better align to the accessible standards of WCAG 2.0 increases the ability of all Concur users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

****Planned Changes** Remove All Instances of "ConcurAccessible"**

Overview

ConcurAccessible is a feature that provides certain accessibility features. However, with the many accessibility enhancements we have been making, *ConcurAccessible* has become obsolete and is no longer used. In addition, it can create inconsistent UI behavior for users.

Given that, with the March release, all *ConcurAccessible* components will be removed from Concur.

USER/CUSTOMER BENEFIT

This ensures a consistent, better experience for all users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

Data Retention

****Planned Changes** New Feature for Outdated Data**

Overview

This new feature will allow clients to control how long Concur stores their data based on who, when, and where criteria.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

When this feature becomes available, and if it has been requested via Concur Client Support, then on the **Company Admin** page, the client admin will see a **Data Retention** link.

More information will be available in future versions of these Release Notes.



When this feature becomes available, for more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this feature becomes available, you may request that it be enabled for your company by contacting Concur Client Support.

Legacy Expense Authorization Request

****Planned Changes** Product Retirement (March 2018)**

Overview

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018.

Concur offered this feature to some clients prior to the existence of the standalone Concur Request product. We now have feature parity as well as enhanced features and full support on the standalone Request product. Clients that wish to leverage a request capability within Concur should purchase and migrate to the Concur Request product.

A client-facing FAQ is available: http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement allows Concur to focus development resources on further enhancements to our standalone Concur Request product whose functionality, innovation, and value now exceeds that of our legacy feature.

Configuration/Feature Activation

Concur has already initiated communication with clients who have recently used our legacy Expense Authorization Request feature to plan migrations to our standalone Concur Request product.



For this change, Concur has archived the *Expense: Authorization Requests Setup Guide* and *Expense: Authorization Requests User Guide*.

New Filter

****Planned Changes** New 23-Month Filter**

Overview

NOTE: This release note supersedes the January release note: *Available Expenses | **Planned Changes** New One-Year Filter*.

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View Transactions
- Unassigned Cash Advances

! IMPORTANT: Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Under View Transactions, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | **Planned Changes** New Feature for Outdated Data* release note included in this month's Planned Changes section of these Release Notes.

Plain Text File Transfer Protocol

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.

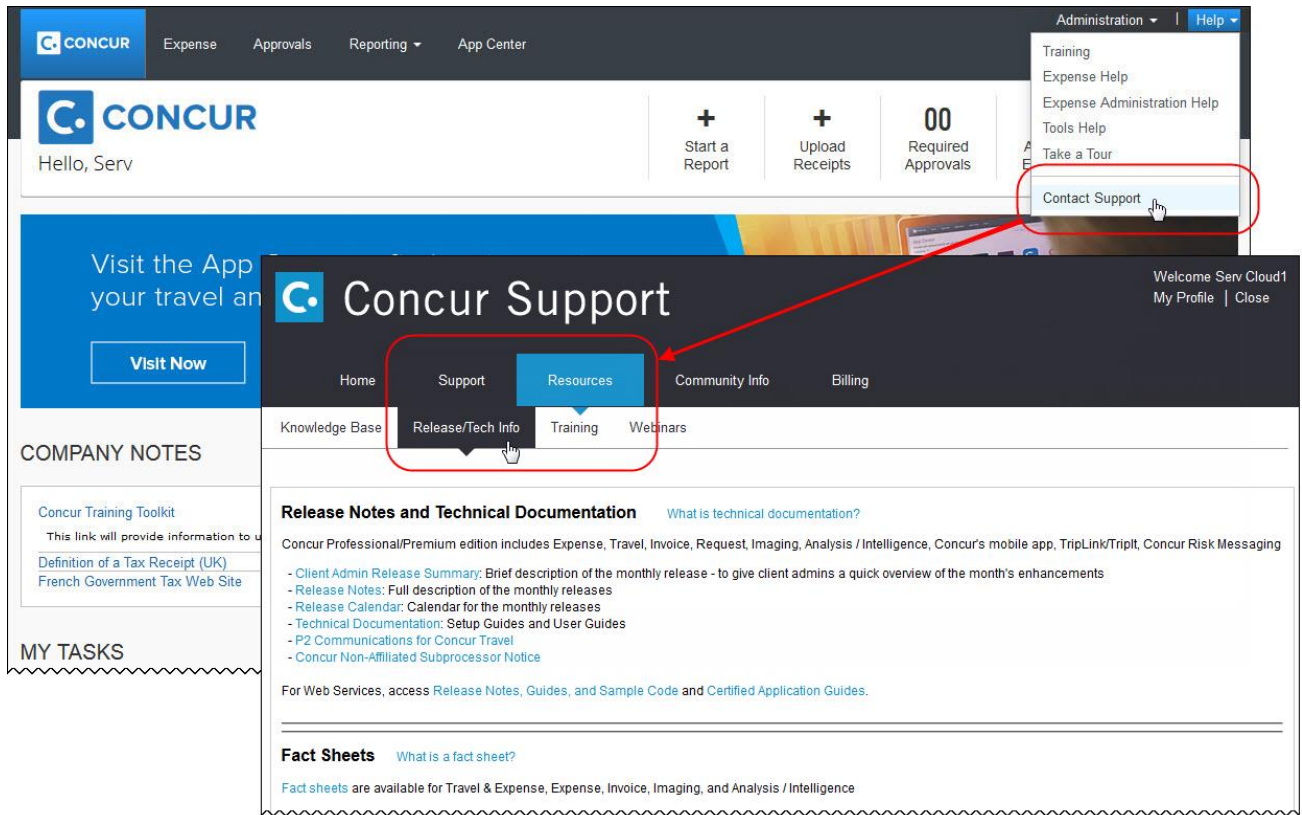
The screenshot displays the Concur Expense Administration Help interface. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The main header shows the Concur logo, a user greeting 'Hello, Terry', and summary statistics: 61 New Authorization Requests, 08 Purchase Requests, and 696 Payment Requests. A 'Help' dropdown menu is open, listing various help topics, with 'Expense Administration Help' highlighted. The main content area is titled 'Resources for Administrators - Professional Edition' and lists several links, including 'Resources for Administrators - Professional Edition' (highlighted with a red circle). A red arrow points from this link to a second screenshot below. The second screenshot shows the 'Expense Professional Administration Guides' page, which lists various guides, including 'Expense Professional Administration Guides' (highlighted with a red circle). A red arrow points from this link to a table of guides.

Expense Setup Guides (English Only)	Format (English Only)
Account Codes	PDF
Allocations	PDF
Attendees	PDF
Audit Rules	PDF
Audit Rules (Validation Rules)	PDF
Budget Insight	PDF
Car Configuration	PDF
Cash Advance	PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



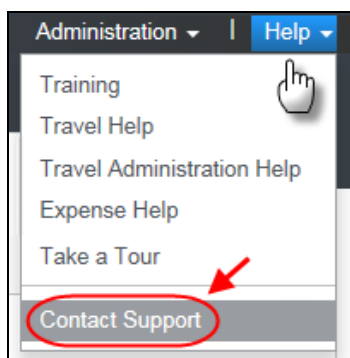
Cases

Steps for Getting a Status

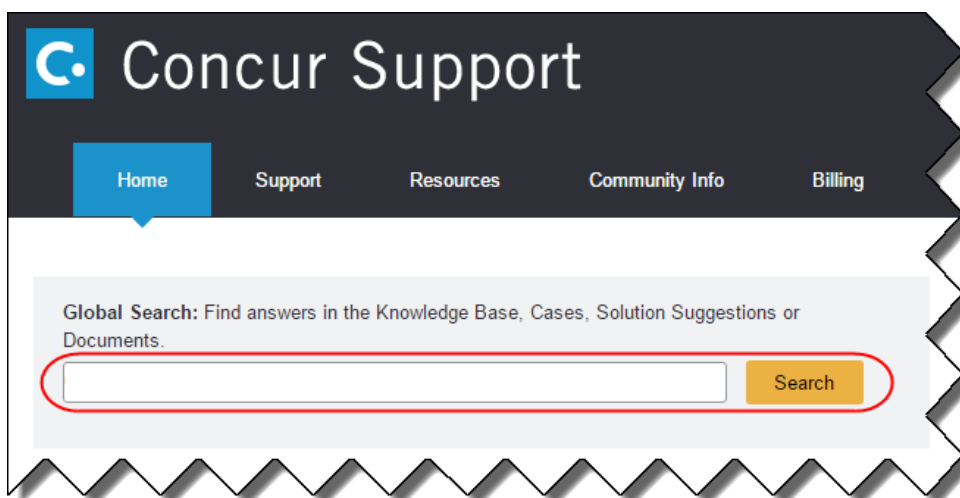
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
2. Click **Help > Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the Concur system internally. Please contact your internal support desk for assistance.

3. Enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

February Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
10141186	Forms and Fields The Expense entry form "Train" could not be found. <i>Concur corrected this issue in the code and now Train can be found in Forms and Fields.</i>

Concur Release Notes	
Expense Professional / Premium	
Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: March 17, 2018 Update #1: Tuesday, April 3, 4:30 PM PT	Client FINAL

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Release Notes

Accessibility

Alternative Text for the Logo on the Sign In Page

Overview

In June of 2017, accessibility tests for the June 2017 VPAT identified exceptions to the WCAG 2.0 global standards of the W3. These exceptions are identified issues where the location or action did not adhere to the A or AA standard of specific WCAG 2.0 rules. Resolving this issue improves our accessibility quality on the targeted location or action by aligning it to the appropriate WCAG standard.

Effectively, the issue and resolution is this: Screen readers are a type of assistive technology that audibly reads each screen element (instructional text, fields, options, etc.) to the user. Proper coding (in this case, known as *alternative text* or *alt text*) is required to ensure the reader “reads” the proper information to the user.

The issue is that the logo on the **Sign In** page does not currently have the proper code to read the logo description to the user. In this release, this issue will be resolved.



BUSINESS PURPOSE/CLIENT BENEFIT

Enhancing our products and services to better align to the accessible standards of WCAG 2.0 increases the ability of all Concur users.

What the User Sees

There is no visual change for the user.

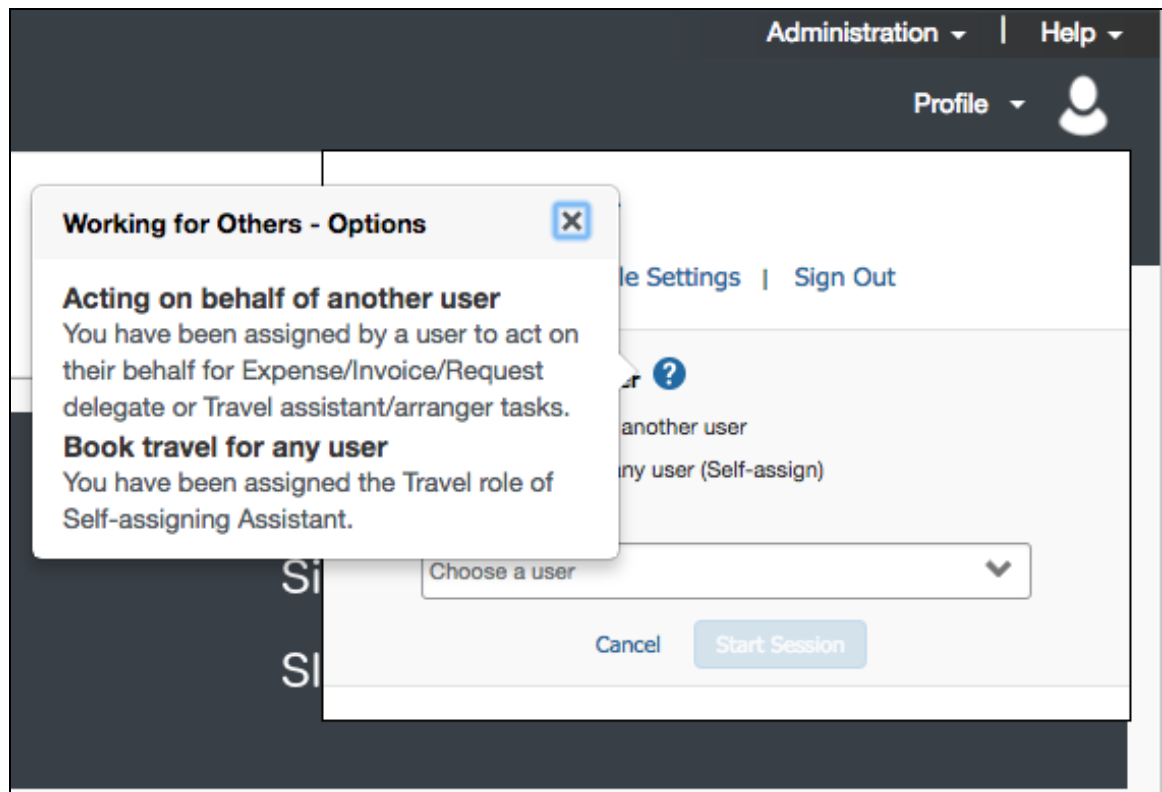
Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

Keyboard Access for Working for Others Quick Help

Overview

The **Working for Others** Quick Help contains important information and should be available to everyone. Currently, it is available only by clicking the "?" icon with a mouse. With this release, the **Working for Others** Quick Help will become accessible via the keyboard.



BUSINESS PURPOSE/CLIENT BENEFIT

Working for Others Quick Help will be available to mouse users and keyboard users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

All companies must take all reasonable steps to protect the personal and sensitive information of their employees. As per recommended security-related best practices, remember that custom fields should not contain personal and sensitive data.

! IMPORTANT: *Data in custom fields is not encrypted.* The client is solely responsible for any liability resulting or arising from improper use.

If your company is currently using custom fields to store personal or sensitive data (for example, Social Security numbers, family member names, or any other personally identifying information), you should plan to remove this information from your existing fields within the service and modify your current configuration.

Next Steps

For information about your configuration and the use of custom fields, contact Concur Client Support or your Account Manager.

Users by Browser Report Updated

Overview

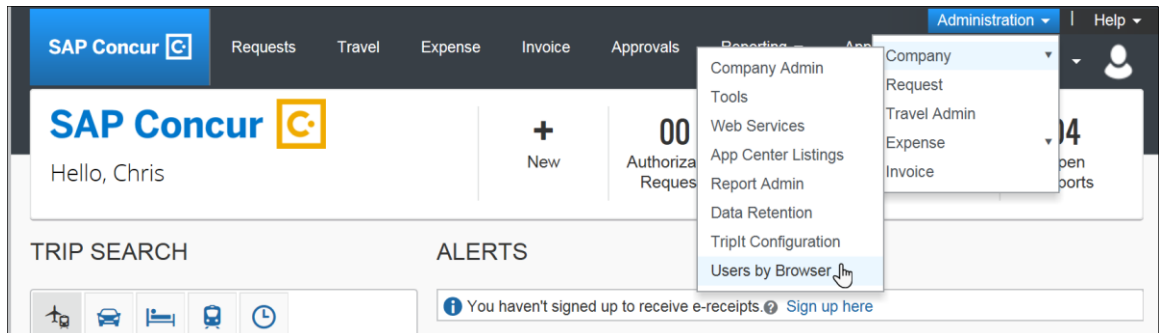
The Users by Browser report has been updated to include more information – all in one place. It now lists all users as well as their browsers and login count.

BUSINESS PURPOSE / CLIENT BENEFIT

The admin no longer has to generate a report for each browser. All users are listed on one report.

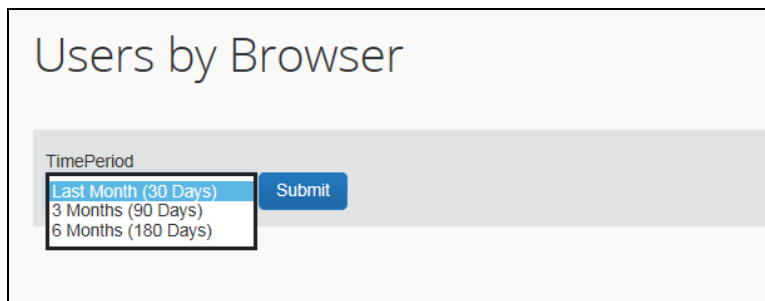
What the Admin Sees

To access the report, the admin clicks **Administration > Company > Users by Browser**.



The **Users by Browser** page appears.

The user selects the desired timeframe and clicks **Submit**.



The report is generated in CSV format.

	A	B	C	D	E	F	G	H	I
1	Login Name	Email	First Name	Last Name	Last Login Date (UTC)	IP Address	Browser	Login Count	
2	mp.com		Melissa		2/28/2018 8:03		Chrome64	4	
3	mp.com		Marta		2/28/2018 1:21		IE11.0	1	
4	amp.com		Danielle		2/28/2018 1:23		IE11.0	1	
5	otcamp.com		Greatest		2/28/2018 1:25		IE11.0	1	
6	otcamp.com		Jaime		2/28/2018 1:28		IE11.0	1	
7	bootcamp.com	camp.com	Randa		2/27/2018 15:52		Chrome64	36	
8	.com		Never		2/28/2018 15:34		Chrome64	8	
9	camp.com		Trainee		2/28/2018 1:19		IE11.0	2	
10	camp.com		Marta		2/28/2018 1:20		IE11.0	3	
11	mp.com	@gmail.com	Andreas		3/1/2018 7:51		IE11.0	14	
12	bootcamp.com	camp.com	Wisam		2/7/2018 14:33		Chrome64	5	
13	mp.com	com	Brian		3/1/2018 7:59		Edge15.15063	8	
14	otcamp.com		Paula		2/28/2018 1:28		IE11.0	1	

Configuration / Feature Activation

The enhancement occurs automatically; there are no additional configuration or activation steps.

Budget

New Budget Feature Generally Available March 19, 2018

This feature will be generally available March 19, 2018 in the US, Canada, Australia, New Zealand, Mexico, Brazil, and United Kingdom. The Budget feature is a purchased service.

Overview

The Budget feature enables clients to set up all components of a budget; a fiscal year to determine the budget period, budget tracking fields to track spending on a cost center (profit center) level, budget categories to group expense types for budget purposes and budgets, which are the actual annual budgets, and Budget Items, which define the budget including fiscal year, budget owner, budget name, and description.

This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense.

NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget feature share data between both calendars.

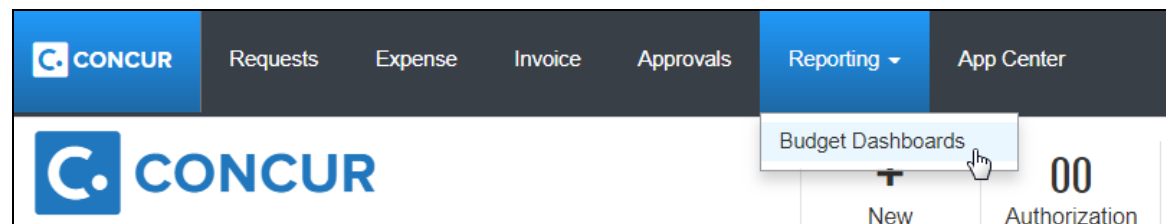
In addition, the Budget feature is available for the Concur mobile app for Expense. Please note that the release for the Concur mobile app occurs seven to ten days after the regular release.

BUSINESS PURPOSE/CLIENT BENEFIT

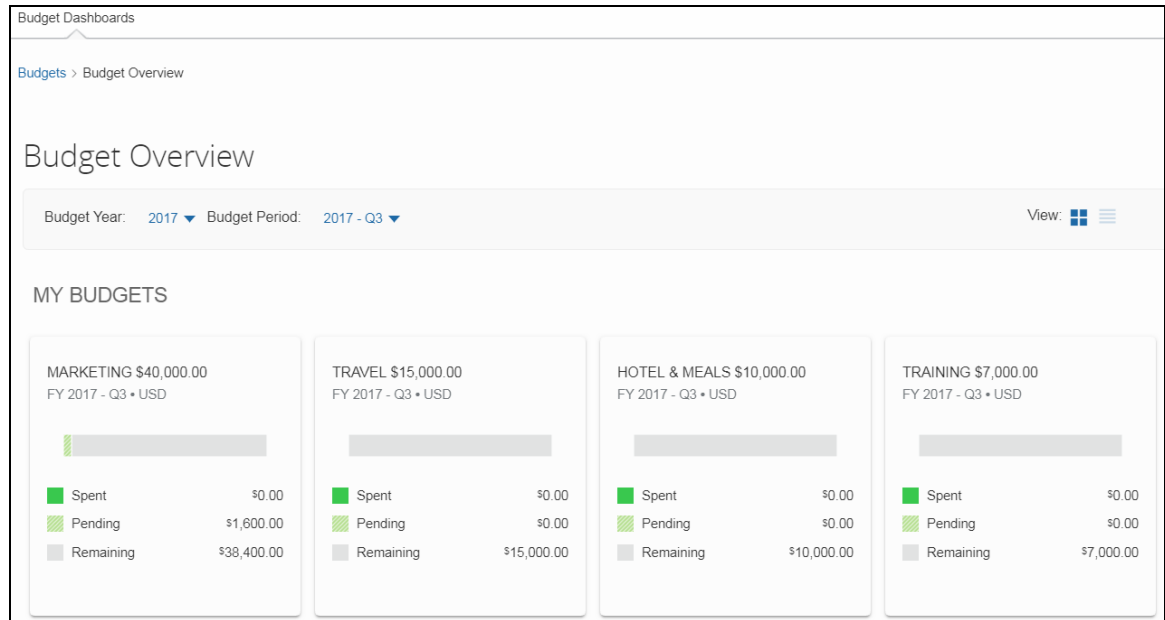
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

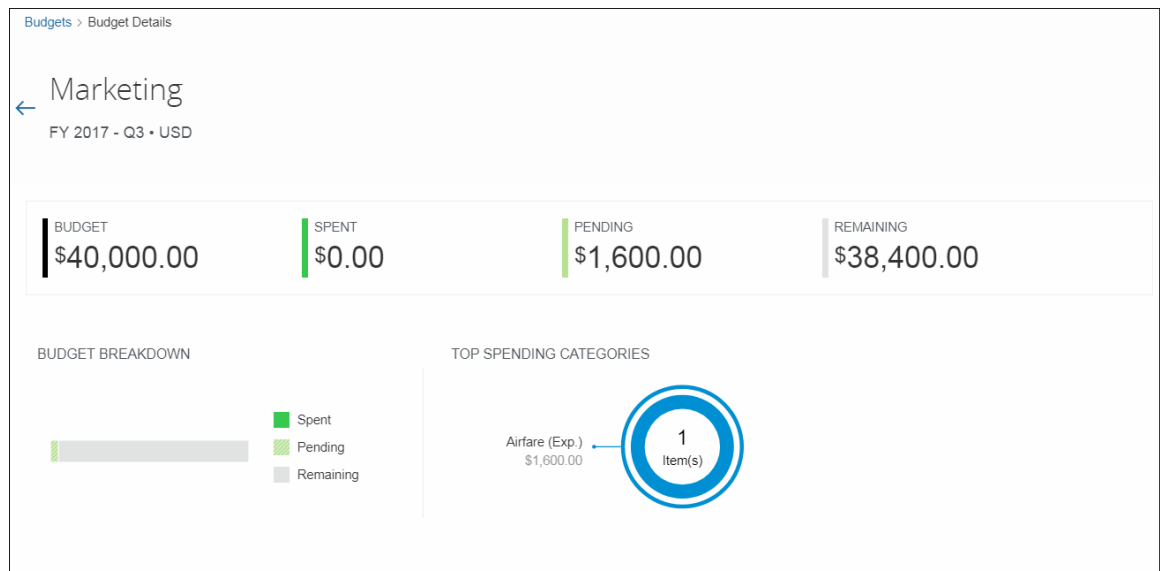
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.



Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



Clicking on one of the budget will show details about that budget.



PENDING						
Export Data Line Items Spending Categories						
Payment Request Purchase Request Expense						
Report Name	Transaction Date	Submitted By	Details	Expense Type	Budget Amount	% of Budget
11142017	11/14/2017	L. Claire	Staples, San Antonio, Texas	Office Supplies	\$67.50	0.16%
1						
SPENT						
Payment Request Purchase Request Expense						
Report Name	Transaction Date	Submitted By	Details	Expense Type	Budget Amount	% of Budget
12232017	12/23/2017	L. Ericka		Trade Shows	\$2,967.66	7.24%
12122017	12/22/2017	L. Yun	Beijiao, Guangdong	Cellular Phone	\$118.64	0.29%
12022017	12/2/2017	L. Joshie	Mitsui, Tokyo, Tokyo	Misc. Promotional Expense	\$149.77	0.37%

What the Admin Sees

The admin will see a new menu, **Budget Configuration**, in Expense Admin. The Budget Configuration page contains five tabs: **Budget Items**, **Fiscal Calendar**, **Budget Category**, **Budget Tracking Fields**, and **Budget Settings**.

NOTE: To access the **Budget Settings** tab, users need to have the Budget Administrator role.

CONCUR Requests Expense Invoice Approvals Reporting Administration Help						
Company Expense Invoice						
Invoice Processing Admin Budget Configuration						
Invoice Processing Admin Accounting Administration Audit Rules Budget Configuration Change Log Company Info Company Locations						
Budget Items Fiscal Calendar Budget Category Budget Tracking Fields Budget Settings						
New Modify Remove Import						
Budget Name	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency	
John01	2017	John Last	John's Budget	\$100,000.00	USD	
John02	2017	John Last	John's Team Budget	\$80,000.00	USD	
John03	2017	John Last	John's Team Trav...	\$40,000.00	USD	

Budget Items tab:

Budget Configuration

Budget Items | Fiscal Calendar | Budget Category | Budget Tracking Fields | Budget Settings

New | Modify | Remove | Import

Budget Name ▲	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
Company01	2017	John Last	Company Travel ...	\$120,000.00	USD
Company02	2017	John Last	Company IT Budget	\$60,000.00	USD

Page 1 of 1 | Displaying 1 - 21 of 21

Fiscal Calendar tab:

Budget Configuration

Budget Items | **Fiscal Calendar** | Budget Category | Budget Tracking Fields | Budget Settings

New | Modify | Activate | Deactivate | Remove

☐ Fiscal Year	Start Date ▼	End Date	Active
☐ 2019	01/01/2019	12/31/2019	Yes
☐ 2018	01/01/2018	12/31/2018	Yes
☐ 2017	01/01/2017	12/31/2017	Yes

Budget Category tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[New](#)
[Modify](#)
[Remove](#)

Budget Category ▲	(Invoice) Expense Types	(Expense) Expense Types
IT	Software Cellular Telephone Telecommunication Equipment Internet Telecommunication Services Computing Equipment	Long Distance Local Phone Cellular Phone
Marketing	Marketing Trade Show	Misc. Promotional Expense Trade Shows
Travel	Travel Conference/Seminar Fees	Company Car Mileage Fixed Meals (gross) Limousine Company Car Wash Subway Company Car Oil Fixed Meals Room Tax Gas

< < | Page 1 of 1 | > > | ↺

Displaying 1 - 3 of 3

Budget Tracking Fields tab:

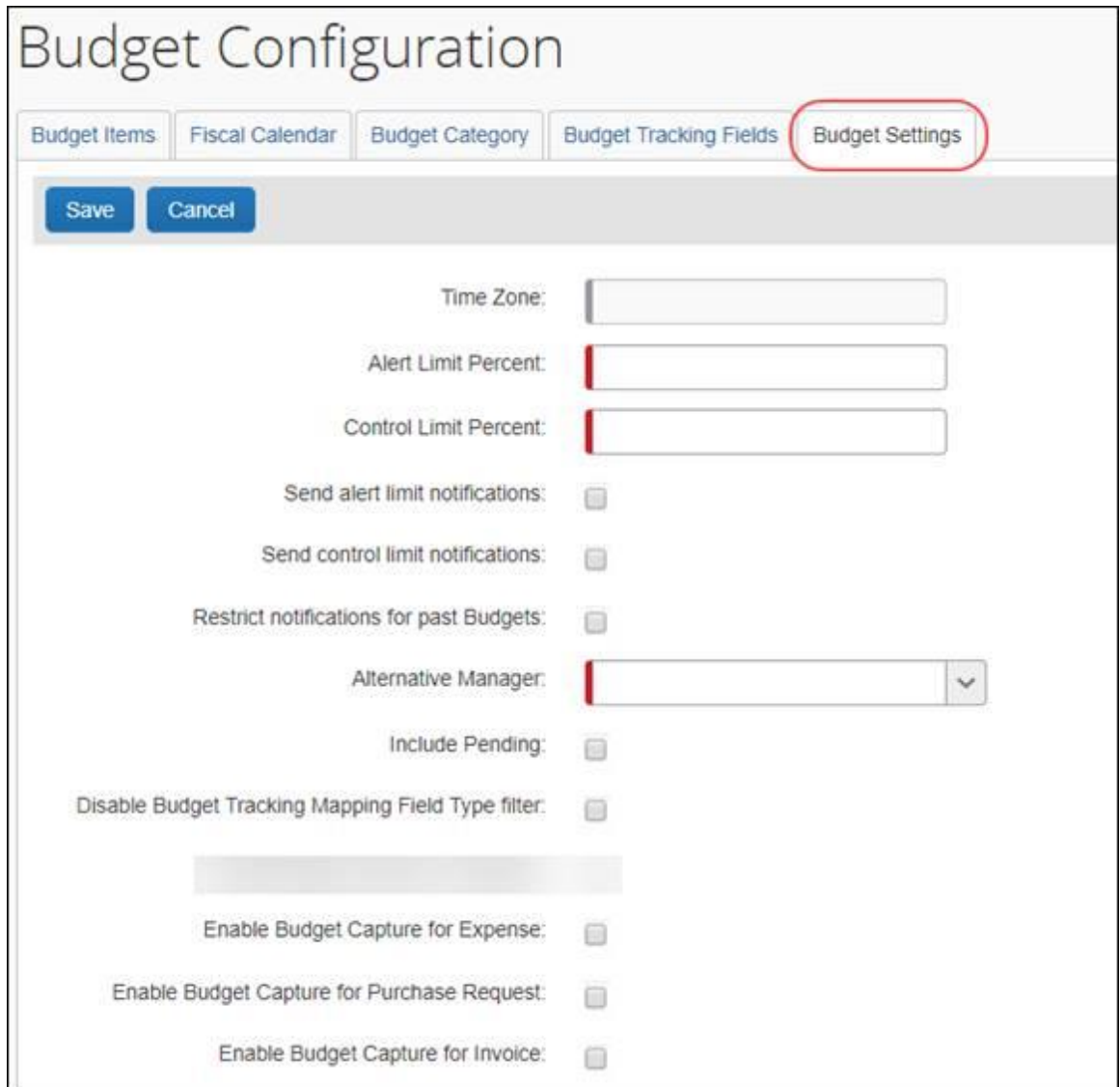
Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[Budget Fields](#)
[Budget Field Mapping](#)

[New Field](#)
[New Connected Field](#)
[Modify](#)
[Remove](#)
[Save Sequence](#)

☐ Budget Tracking Field	Field Type	List	Sequence ▲
☐ Department Function	Connected List	Function	↓
☐ Region Country	Connected List	Geography	↓ ↑
☐ Product Group Product	Connected List	Product	↓ ↑

Budget Settings tab:


Budget Configuration

Budget Items | Fiscal Calendar | Budget Category | Budget Tracking Fields | **Budget Settings**

Save **Cancel**

Time Zone:

Alert Limit Percent:

Control Limit Percent:

Send alert limit notifications: ☐

Send control limit notifications: ☐

Restrict notifications for past Budgets: ☐

Alternative Manager:

Include Pending: ☐

Disable Budget Tracking Mapping Field Type filter: ☐

Enable Budget Capture for Expense: ☐

Enable Budget Capture for Purchase Request: ☐

Enable Budget Capture for Invoice: ☐

Configuration/Feature Activation

Concur needs to activate this features in a Concur internal-only tool.

Once Concur has activated the Budget feature, the Budget Administrator needs to configure the feature in the Budget Configuration tool in Expense Admin.



For more information, refer to the *Shared: Budget Setup Guide*, the *Shared: Budget Item Import User Guide*, the *Budget Client Fact Sheet*, and the *Budget FAQ*.

Expense Pay

Additional Card Programs Now Supported for EUR and USD

Overview

Expense Pay – Global for Expense Professional edition now supports the following credit card program for the Euro (EUR €):

- HSBC MasterCard EUR

Expense Pay – Global now supports the following credit card programs for the United States Dollar (USD \$):

- Capital One MasterCard USD
- PNC Bank Visa USD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

The screenshot shows a web form titled "Add New Card Program". It contains the following fields and controls:

- Program Name:** A text input field.
- Payment Type:** A dropdown menu.
- Program Type:** A dropdown menu, which is highlighted with a red circle. To its right is a link labeled "Verify IIN".
- Currency:** A text input field.
- Active:** A dropdown menu currently showing "Yes".
- Classic:** An unchecked checkbox.
- Global:** An unchecked checkbox.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

Consent Term Clarified from "Agree" to "Authorize"

Overview

For all users who opt-in to receive payments via Expense Pay, both Expense Pay – Global and classic Expense Pay, the term "agree" has been changed to "authorize" in the Concur User Interface (UI).

BUSINESS PURPOSE/CLIENT BENEFIT

This change provides greater legal clarity for the instruction that users authorize direct deposits from Concur for classic Expense Pay or a Concur payment-processing partner for Expense Pay - Global.

What the User Sees

EXPENSE PAY – CLASSIC

Users of Expense Pay – Classic will see this change in the UI:

- On the **Profile > Profile Settings > Bank Information** page, the button that read, "Save And Agree," now reads, "Save And Authorize."

The image displays two side-by-side screenshots of the 'Bank Information' form in the Concur User Interface. The left screenshot is labeled 'BEFORE' and the right is labeled 'AFTER'. Both forms contain the same fields: Bank Country (dropdown), Routing Number, Bank Name, Status, Personal Address Line 1, City, Bank Currency (dropdown), Bank Account Number, Re-Type Bank Account Number, Branch Location, Account Type (dropdown), Active (dropdown), Personal Address Line 2, State, and ZIP Code. The primary difference is the button at the bottom: 'Save And Agree' in the 'BEFORE' version and 'Save And Authorize' in the 'AFTER' version. Red arrows point from the 'BEFORE' button to the 'AFTER' button, highlighting the text change.

EXPENSE PAY – GLOBAL

Users of Expense Pay – Global will see these changes in the UI:

- On the **Profile > Profile Settings > Bank Information** page, the “Agree to the use requirement below” checkbox label now reads, “I authorize the use requirement below.”

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

Legacy Expense Authorization Request

Disabled Policy Setting for Legacy Expense Authorization Request

Overview

As preparation for the impending retirement of the legacy Expense Authorization Request feature, as part of the March 17, 2018 release, the ability to modify the setting to control creation of legacy Authorization Requests has been made read-only on the **Expense Policy** page.

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018. A client-facing FAQ is available:

http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

! **IMPORTANT:** Please also read the following release note: *Legacy Expense Authorization Request | Product Retirement March 31, 2018* in these March release notes.

WHAT THE EXPENSE ADMINISTRATOR SEES

With the March release, the field **Disable ability to create new Authorization Request** on the Expense Policy is modified to be read-only. This field and others pertaining to the settings for legacy Authorization Request are only shown when the company is using the legacy Authorization Request.

NOTE: The value in this field is not altered with the March 17, 2018 release, but will be selected (checked to prevent creation of new authorization requests) automatically on the retirement date, March 31, 2018.

The screenshot shows the 'Modify Policy: CA Expense Policy' interface. Under the 'General' tab, several configuration fields are visible: 'Name' (CA Expense Policy), 'Expense Report Form' (Default Report Information), 'Expense Report Workflow' (CES Standard Report Workflow), 'Authorization Request Header Form' (None), 'Authorization Request Workflow' (None), 'Authorization Request Active Days' (empty), 'Disable ability to create new Authorization Requests' (checkbox, currently unchecked and highlighted with a red circle), and 'Scan Configuration' (None).

Configuration

This change is applied automatically.

If a company using legacy Authorization Request has a need to create a new Expense policy after this change and before the retirement of the feature, the administrator may copy a policy with the desired value for this field. The copied policy will retain the value from the original policy, and can subsequently be edited to create the desired new policy.

Product Retirement March 31, 2018

! IMPORTANT: Please also read the following release note: *Disabled Policy Setting for Legacy Expense Authorization* in these March release notes.

Overview

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018.

Concur offered this feature to some clients prior to the existence of the standalone Concur Request product. We now have feature parity as well as enhanced features and full support on the standalone Request product. Clients that wish to leverage a request capability within Concur should purchase and migrate to the Concur Request product.

A client-facing FAQ is available: http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement allows Concur to focus development resources on further enhancements to our standalone Concur Request product whose functionality, innovation, and value now exceeds that of our legacy feature.

Configuration/Feature Activation

Concur has already initiated communication with clients who have recently used our legacy Expense Authorization Request feature to plan migrations to our standalone Concur Request product.

For this change, Concur has archived the *Expense: Authorization Requests Setup Guide* and *Expense: Authorization Requests User Guide*.

Next Generation (NextGen)

Expense User Interface

New User Interface for Concur Expense End Users

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **Preview Period:** The Preview Period begins March 17, 2018 and runs through September 2018. During this time, the new UI will be available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (until March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a

consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Travel Allowance

(Czech) Deductions on Government Rates

Overview

Before this change, when customers using both COMP and GOVT rates deducted meals, it has been discovered that the proper percentages set up in the **Calculation Properties** were being used for COMP rates, however they were not being used for the GOVT rates. The taxable/non-taxable calculation was not correct.

After this change, both COMP rates and GOVT rates are deducted as specified in the calculation property for partial days. The above limit (taxable amount) calculated is correct when calculation property **use_govt_meal_deduction_for_both_config** is enabled.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement provides correct calculations.

What the User Sees

If you enable this feature, employees will see a difference in calculated, above limit, taxable amounts.

What the Admin Sees

The **Calculation Properties** tab of the **Travel Allowance** page displays the new **Calculate GOVT Meals Deductions for BOTH CONFIG** option.

Travel Allowance

Configurations
Employee-Related Configurations
Rates
Configuration Sets
Itinerary Search
Calculation Properties

Calculation Method: Czech Rules ▼

Modify

Name	Label	Type	Value
meal_deduction_f_band_four_rate	Fourth Foreign Meal Deduction Rate (percent)	edit	25
meal_deduction_f_band_one_mi...	First Foreign Meal Deduction Time Band Minutes (integer between 0 a...	edit	60
meal_deduction_f_band_one_rate	First Foreign Meal Deduction Rate (percent)	edit	0
meal_deduction_f_band_three_...	Third Foreign Meal Deduction Time Band Minutes (integer between 0 a...	edit	1080
meal_deduction_f_band_three_rate	Third Foreign Meal Deduction Rate (percent)	edit	35
meal_deduction_f_band_two_mi...	Second Foreign Meal Deduction Time Band Minutes (integer between ...	edit	720
meal_deduction_f_band_two_rate	Second Foreign Meal Deduction Rate (percent)	edit	35
pocket_money_rate	Pocket Money Rate (percent)	edit	0
use_govt_meal_deduction_for_b...	Calculate GOVT Meals Deduction For BOTH CONFIG	checkb...	Y

Configuration/Feature Activation

Concur automatically added this setting to the **Calculation Properties** tab. To enable the option, perform the following steps.

NOTE: This new setting is on (Y) by default.

To disable this option:

1. Click **Administration** > **Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Travel Allowance** (left menu).
3. Click the **Calculation Properties** tab.
4. In the **Calculation Method** list, select *Czech Rules*.
5. Click **use_govt_meal_deduction_for_both_config**, and then click **Modify** to disable it.



For more information about Travel Allowance for Czechia, refer to the *Expense: Travel Allowance Configuration Guide - Czech*.

(Poland) New Setting for Optional Domestic Segments Merge

Overview

Currently, when the **use_24_hour_day_separation** enhancement is enabled, domestic segments from the first day of mixed travel and the immediate next day of mixed travel are merged.

In order to disable this domestic segment merge, a new calculation property has been introduced: **disable_domestic_merge_for_24_hour_day_separation**.

When this property is checked, the domestic merge will no longer take place.

This new setting applies to 24-hour day calculations and requires the **use_24_hour_day_separation** property to be enabled, to take effect.

BUSINESS PURPOSE/CLIENT BENEFIT

The new calculation property will give client Admins the option to disable the merge of the domestic segments of travel. Instead of the merge, these segments of travel will continue to be a part of the separate 24-hour day calculation logic.

What the User Sees

If you enable this setting for the travel allowance feature, employees will see a difference in total allowance calculation for mixed trips.

What the Admin Sees

The **Calculation Properties** tab of the **Travel Allowance** page displays the new **Disable Domestic Merge for 24Hr Day Separation Enhancement** option.

The screenshot shows the 'Travel Allowance' page with the 'Calculation Properties' tab selected. The 'Calculation Method' is set to 'Poland Rules'. A red arrow points to the 'Calculation Method' dropdown. Below the table, the 'Disable Domestic Merge for 24Hr Day Separation Enhancement' option is highlighted with a red box.

Name	Label	Type	Value
disable_domestic_merge_for_24_hour_day_sep...	Disable domestic merge for the 24hr day separation enhancement.	checkbox	Y
domestic_combined_lunch_dinner_deduction_fa...	Domestic combined lunch and dinner factor	edit	50
domestic_extended_trip_factor	Domestic Extended Trip Factor (percent)	edit	100
domestic_extended_trip_factor_company	Domestic Extended Trip Company Factor (percent)	edit	100
domestic_extended_trip_limit	Domestic Extended Trip Days (integer)	edit	30
domestic_meals_percent	Low Meals Rate (percent)	edit	50
domestic_use_prorated_deductions	For Domestic Trips Use Prorated Deductions (Y/N)	checkbox	N
high_hours	High Hours (integer between 0 and 23)	edit	12
international_combined_lunch_dinner_deduction...	International combined lunch and dinner factor	edit	50
international_extended_trip_factor	International Extended Trip Factor (percent)	edit	100
international_extended_trip_factor_company	International Extended Trip Company Factor (percent)	edit	100
international_extended_trip_limit	International Extended Trip Days (integer)	edit	30
intl_high_meals_percent	International High Meals Rate (percent)	edit	50
intl_low_meals_rate	International Low Meals Rate (percent)	edit	33.3334
intl_use_prorated_deductions	For International Trips Use Prorated Deductions (Y/N)	edit	N
low_hours	Low Hours (integer between 0 and 23)	edit	8
use_24hour_day	Use 24 hour day	edit	Y
use_24_hour_day_separation	Use domestic and international trip separation for 24 hour day (Y/N)	edit	Y
use_combined_lunch_dinner_deduction_cap	Use combined lunch and dinner cap	edit	N

Configuration/Feature Activation

Concur automatically added this setting to the **Calculation Properties** tab. To enable the option, perform the following steps.

NOTE: This new setting is off (N) by default.

To enable this option:

1. Click **Administration > Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Travel Allowance** (left menu).
3. Click the **Calculation Properties** tab.
4. In the **Calculation Method** list, select *Poland Rules*.

5. Click **disable_domestic_merge_for_24_hour_day_separation**, and then click **Modify** to enable it.



For more information about Travel Allowance for Poland, refer to the *Expense: Travel Allowance Configuration Guide - Poland*.

Planned Changes

The items in this section are targeted for future releases. Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Accessibility

****Planned Changes** Remove All Instances of "ConcurAccessible"**

This release note has been removed but will be included for a future release.

Admin

****Planned Changes** Expense Assistant Can Create Trip-based Expenses Reports**

This release note has been removed but will be included for a future release.

****Planned Changes** Removing the "Privacy Agreement" Page**

Overview

For clients who currently display the **Privacy Agreement** page to users, be aware that on **April 14, 2018**, Concur will eliminate that page. That means, the privacy agreement will no longer display, under any circumstances. In addition, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

In a separate release, Concur will provide a standard privacy statement, which can be accessed via a link in the page footer.

This release note discusses the removal of the **Privacy Agreement** page and its associated configuration options. Information about the new Concur privacy statement will be provided in future release notes.

The intent of the change is to ensure that all customers see the same unmodified Concur privacy statement.

FAQs

Q. Why can't I continue using this feature?

A. Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within Concur services.

Q. When will the existing **Privacy Agreement** page be removed?

A. On April 14, 2018, the page will be removed; users will no longer see the privacy agreement – whether customized or generic.

Between now and April 14, if you want to remove your customized privacy agreement from the **Privacy Agreement** page, you can. For clients who have access to the custom text option or the privacy agreement settings, you can make those changes yourself. For clients who do not have access to the custom text option or the privacy agreement settings, you can contact Concur Client Support for assistance.

No action is necessary. You do not have to make changes now unless you want to.

Q. What will Concur provide in place of the current **Privacy Agreement** page?

A. Some clients have used the **Privacy Agreement** page to convey company-specific information to its users. That option will no longer be available. Instead, the Concur privacy statement – accessible via a link the page footer – will describe Concur’s processing activities of customer data.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Clients must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. When the new Concur privacy statement is implemented; will I be able to modify it or require that users accept it?

A. The Concur privacy statement will not be configurable by clients in any way. Its function is to describe Concur’s processing activities of client data.

Q. Who can I contact for more information?

A. You can contact Concur Client Support for additional information regarding these settings and/or Concur’s updated privacy statement.

Configuration / Feature Activation

The **Privacy Agreement** page and associated configuration options will be automatically removed. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

Company Card

**** Planned Changes ** Change to AMEX GL 1022 “No Vendor Supplied” Card Feed Data Handling**

Overview

In an upcoming release, clients moving to the GL-1022 American Express card feed can expect enhanced handling of the “American Express Initiated Activity” data to match that of the GL-1025 feed. With this upcoming change, data will yield values for **Merchant Name** and/or **Vendor Name** instead of returning a “No Vendor Supplied” message.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement updates the GL-1022 data reconciliation to match the behavior of the GL-1025 card feed, as requested by our Brazilian clients adopting the GL-1022 feed.

Preparing for This Change

Clients whose audit rule definitions will trigger based on the existing *Vendor Name = No Vendor Supplied* feed return value should review and, if necessary, update these configurations to match the new behavior of the GL-1022 card feed.

Configuration/Feature Activation

Concur will automatically implement this change.

Data Retention

****Planned Changes** New Feature for Outdated Data**

Overview

This new feature will allow clients to control how long Concur stores their data based on who, when, and where criteria.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

When this feature becomes available, and if it has been requested via Concur Client Support, then on the **Company Admin** page, the client admin will see a **Data Retention** link.

More information will be available in future versions of these Release Notes.



When this feature becomes available, for more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this feature becomes available, you may request that it be enabled for your company by contacting Concur Client Support.

In-Product Messaging

****Planned Changes** Opt Out of In-Product Messaging (United States)**

Overview

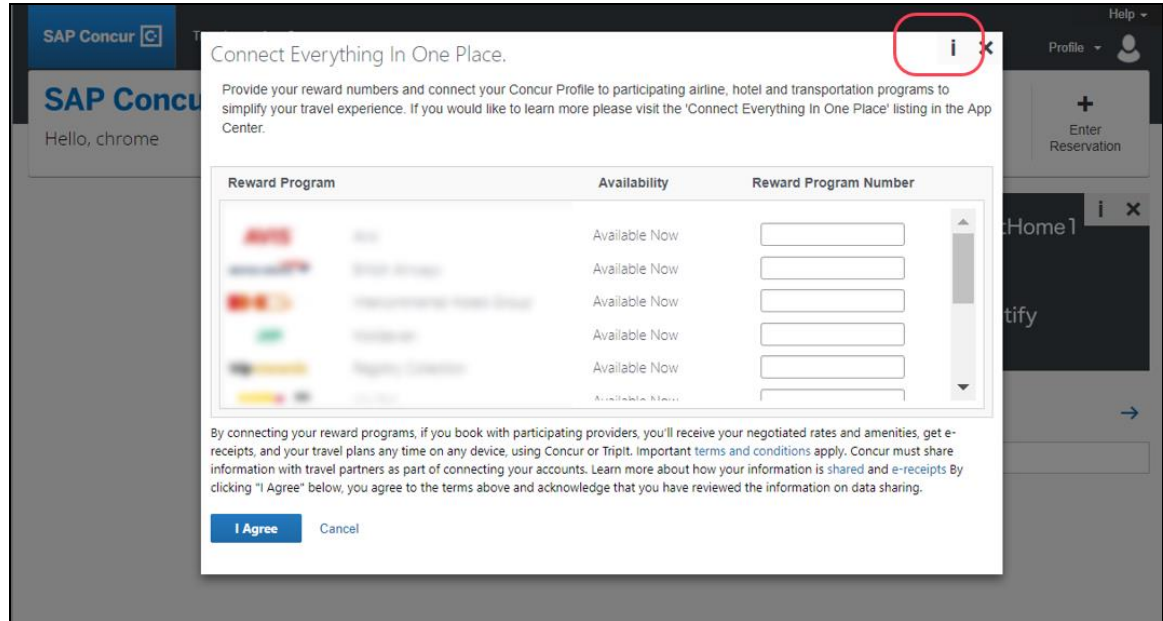
Last year, when in-product messaging was introduced in Europe, the feature included the ability for users to opt out of messaging.

In a future release, Concur will provide customers in the United States the ability to opt out.

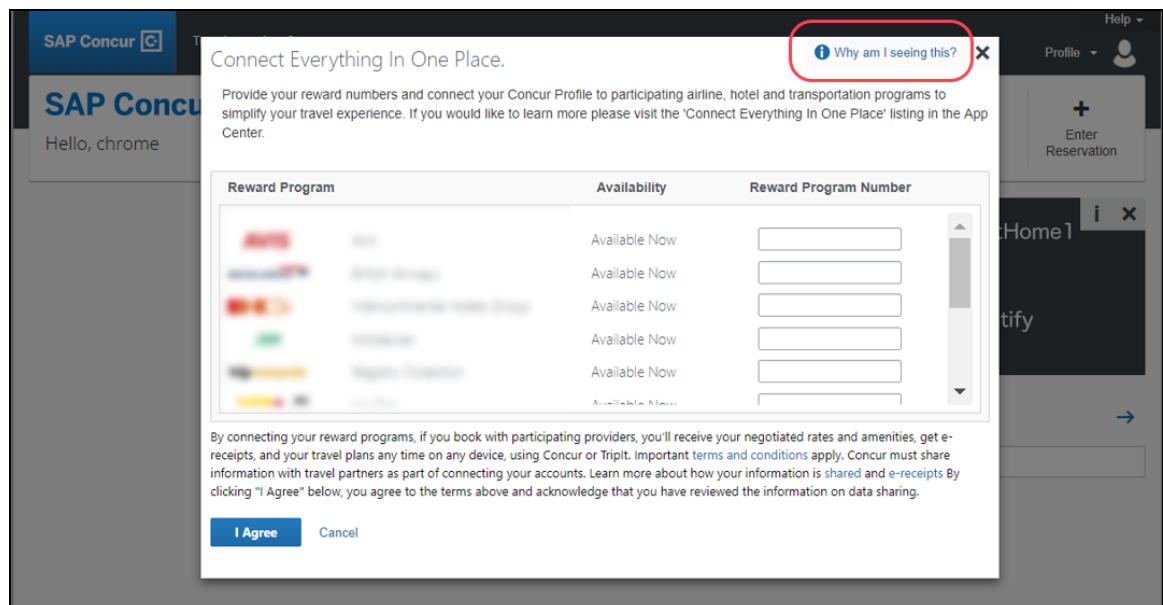
What the User Sees

MESSAGES

An information icon appears in the upper-right corner of the message.

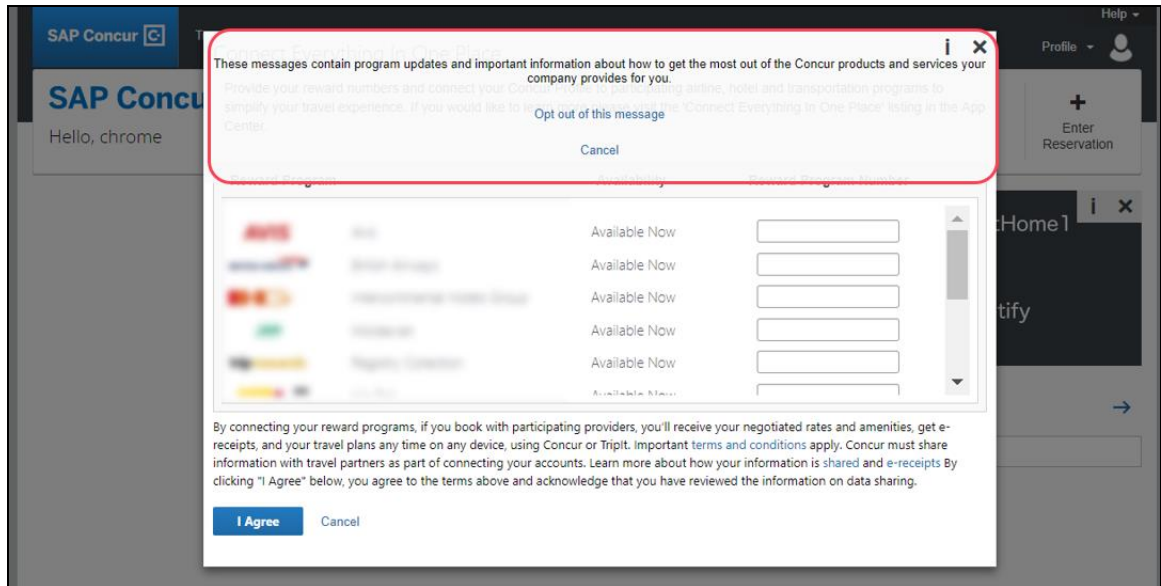


When the user clicks it or hovers the mouse pointer over it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to

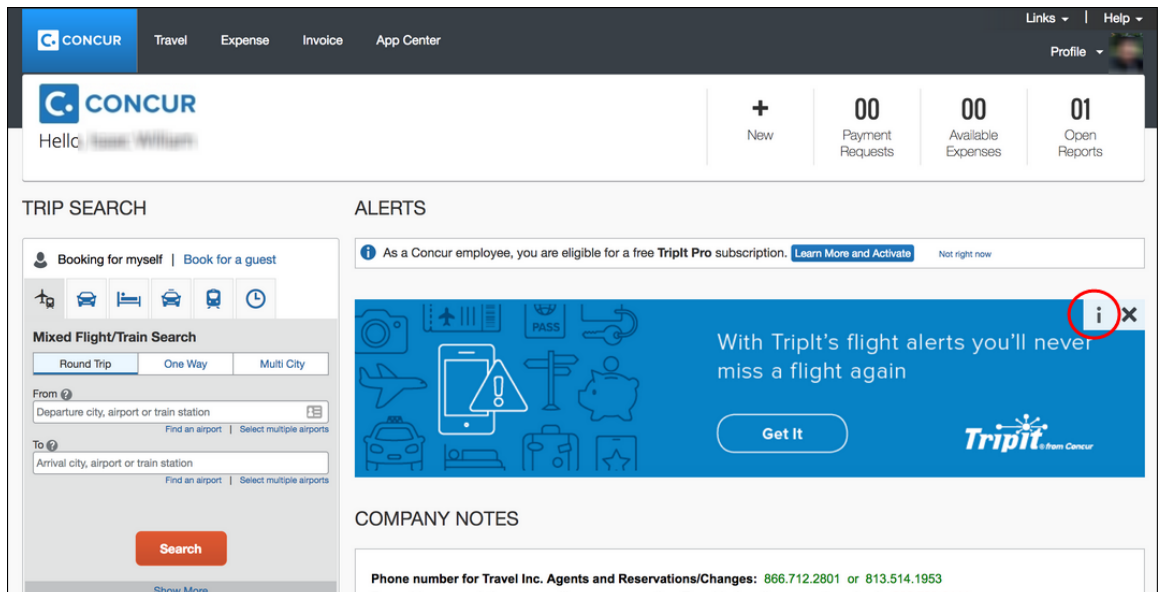
click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other categories.



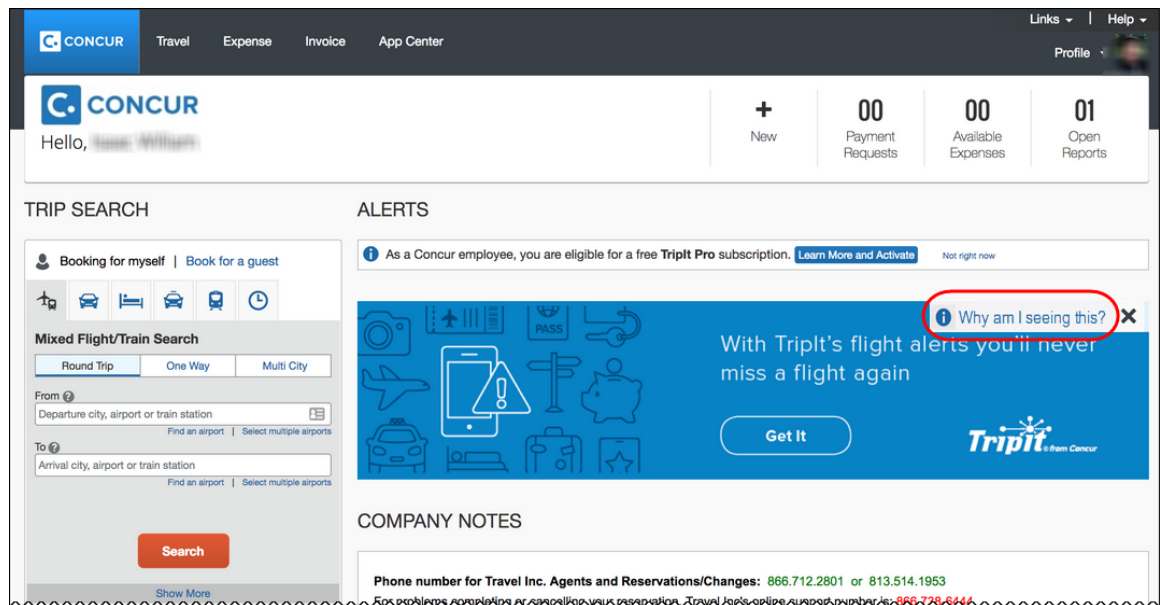
When the user clicks the close button (X in the upper-right corner), the window closes.

IN-PAGE MESSAGES

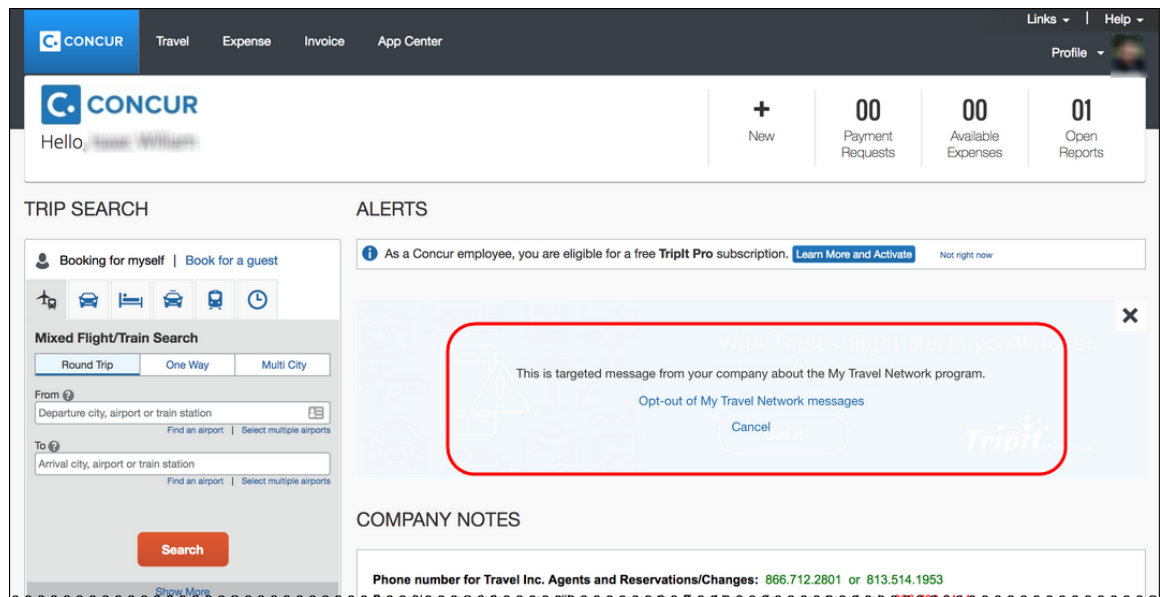
An information icon appears in the upper-right corner of the message.



When the user clicks it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this message as well as a link for the user to click to opt out of seeing similar messages in the future. The user could still be shown IPM relating to other categories.



When the user clicks the close button (X in the upper-right corner), the message collapses and is removed from the page entirely.

Configuration / Feature Activation

Concur will automatically implement this change; there will be no additional configuration or activation steps.

Japan Public Transport (JPT)

****Planned Changes** IC Card Readers Will Support Company-Level Authentication**

Overview

The IC Card Reader solution will switch authentication processes during the weekend of April 14th and 15th, 2018. The maintenance time will be provided in a future version of these release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

This change will simplify user activation and allow transactions to show more quickly in **Available Expenses**.

What the User Sees

Users should be aware of these three important changes.

1. During maintenance time, users will not be able to read and send IC Card transaction to Concur Expense.
2. After this change, the User Activation step will become unnecessary. This step is currently described in the *Expense: Japan Public Transportation User Guide*.

NOTE: This change will apply only for the users of the Pit Touch Pro2 IC Card Reader device. For Android Tablet type IC Card Reader device users, the user activation process will not change.

3. After this change, multiple not-yet-sent train transactions will reach to Concur and shown in **Available Expenses**. If the current authentication per user failed (i.e. token expired) and the user has not done re-activation with an activation email, train usage transactions retain a "not sent" status. Such not-yet-sent transactions will be sent by a daily automatic retry process after this change.

Configuration/Feature Activation

Concur will automatically implement these changes; there are no configuration or activation steps.

New Filter

****Planned Changes** New 23-Month Filter**

Overview

NOTE: This release note supersedes the January release note: *Available Expenses | **Planned Changes** New One-Year Filter*.

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View Transactions
- Unassigned Cash Advances

! IMPORTANT: Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Under View Transactions, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | **Planned Changes** New Feature for Outdated Data* release note included in this month's Planned Changes section of these Release Notes.

Plain Text File Transfer Protocol

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.

The image displays two screenshots of the Concur online help interface for administrators. The top screenshot shows the 'Help' dropdown menu with 'Expense Administration Help' highlighted. The bottom screenshot shows the 'Resources for Administrators' page with 'Expense Professional Administration Guides' highlighted.

Resources for Administrators - Professional Edition

- Using Online Help
- Legal Notice
- Resources for Administrators - Professional Edition**
- Expense Professional Administration Guides
- Budget Administration Guides
- What's New - Professional Edition
- Release Note Admin Summaries (Translated, HTML Format) - Professional Edition
- Profile

Expense Professional Administration Guides

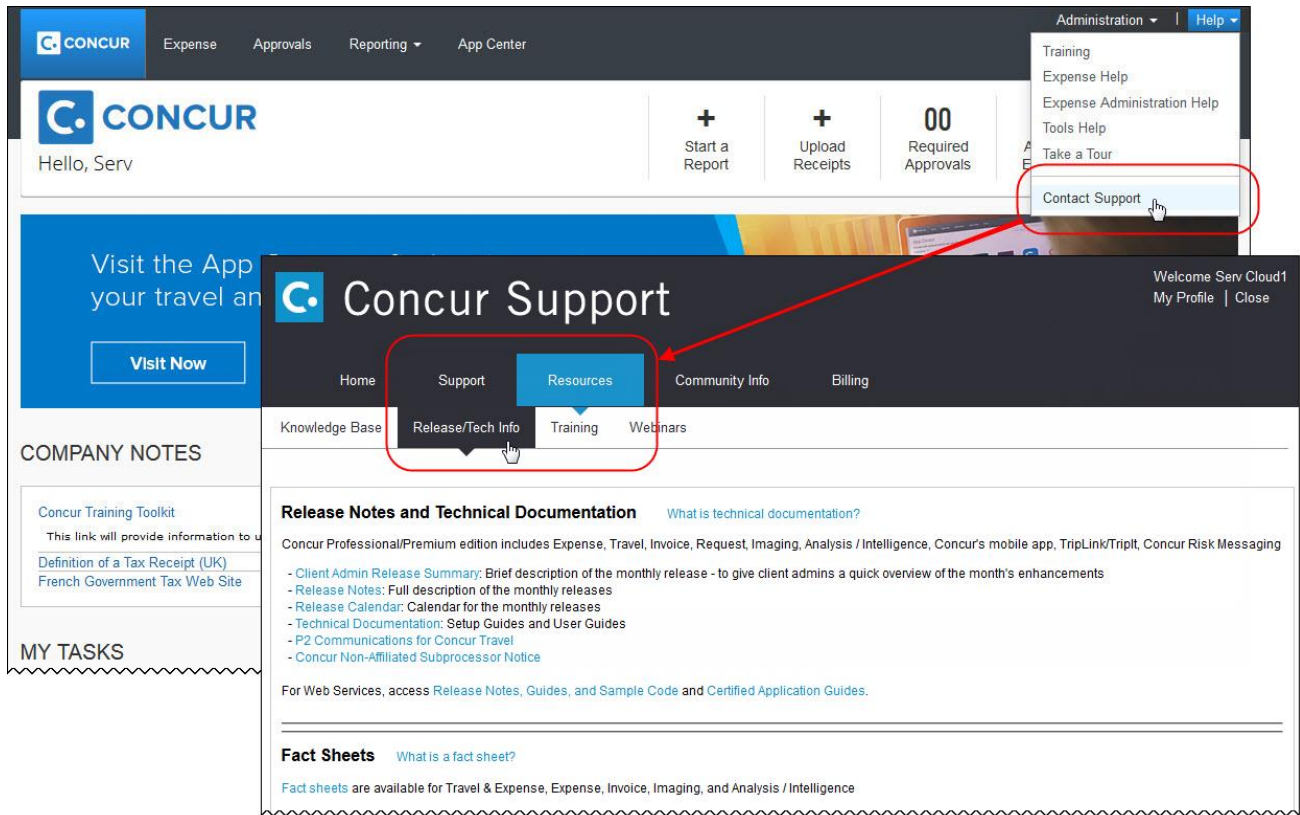
Expense Administration Guides (English only)

Expense Setup Guides (English Only)	Format (English Only)
Account Codes	PDF
Allocations	PDF
Attendees	PDF
Audit Rules	PDF
Audit Rules (Validation Rules)	PDF
Budget Insight	PDF
Car Configuration	PDF
Cash Advance	PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



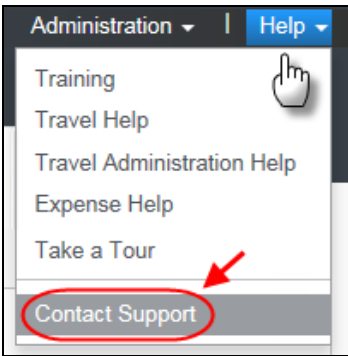
Cases

Steps for Getting a Status

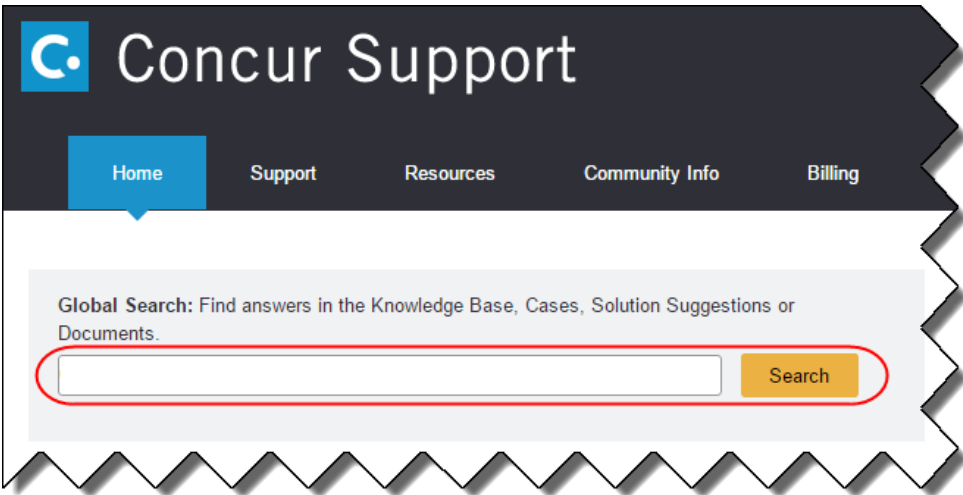
Each service release contains case resolutions.

► **How to check the status of a submitted case**

6. Log on to <https://concursolutions.com/portal.asp>.
7. Click **Help > Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the Concur system internally. Please contact your internal support desk for assistance.

- 8. Enter your **Case ID**.
- 9. Click **Search**. Search results are limited to each company's own cases.

March Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11271275	Expense Pay - Global An employee report repeatedly aborted with the message that the banking system had returned a payment demand. <i>Concur corrected this issue by increasing the number of allowable characters in the bank name field. The report now runs successfully.</i>

SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: April 14, 2018 Initial Post: Friday, April 13, 1:00 PM PT	Client FINAL

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All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

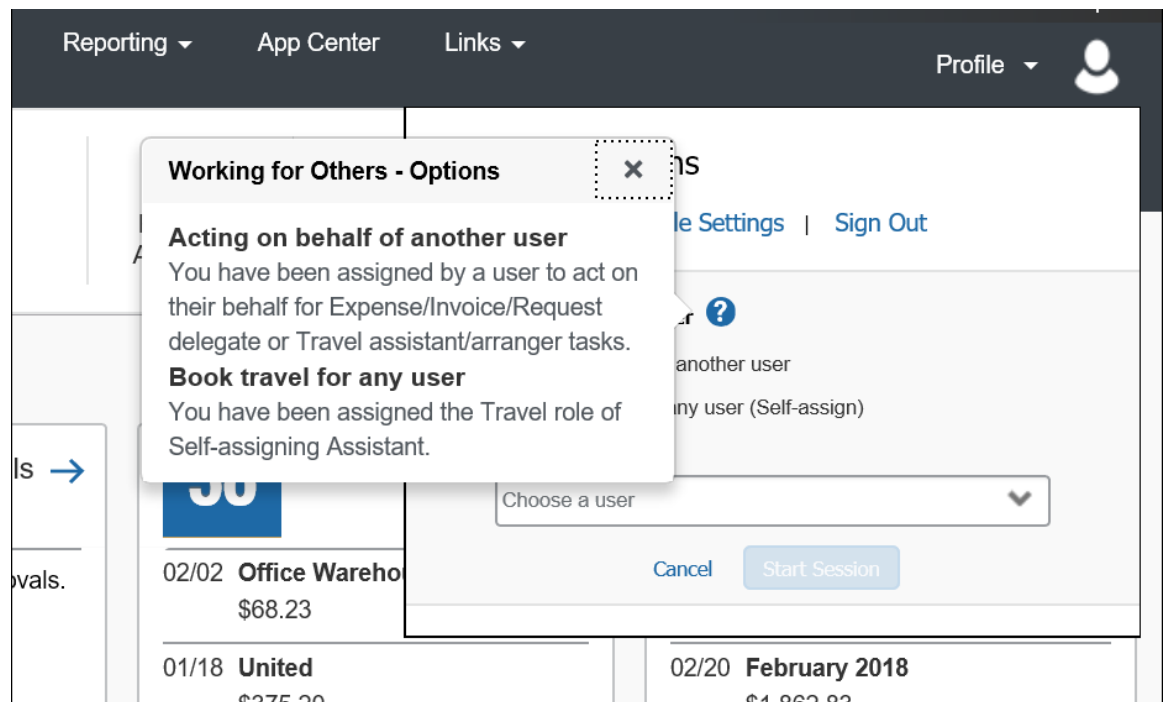
Release Notes

Accessibility

Clarification: Keyboard Access for Working for Others Quick Help

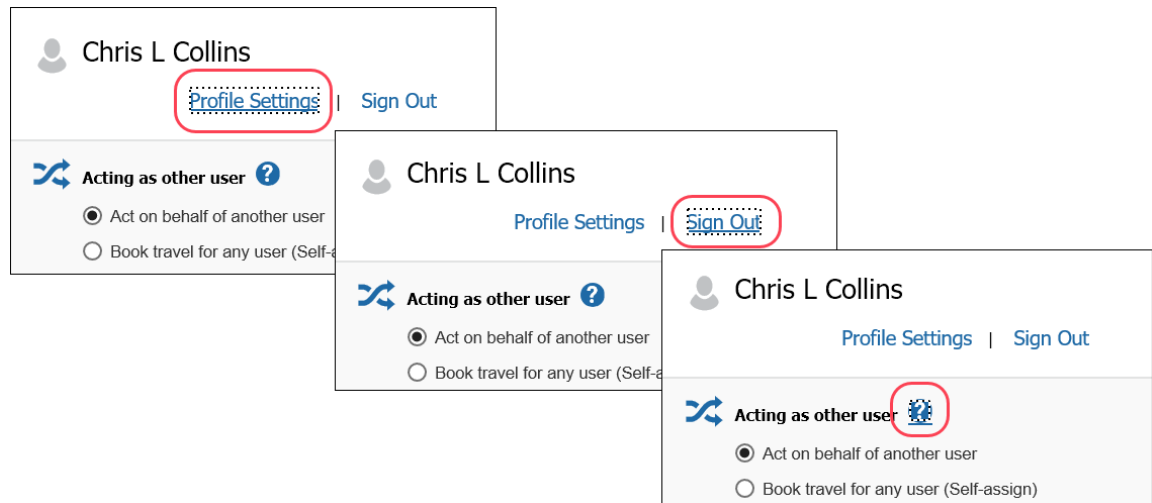
Overview

With the March release, SAP Concur announced that the **Working for Others** Quick Help became accessible via the keyboard.

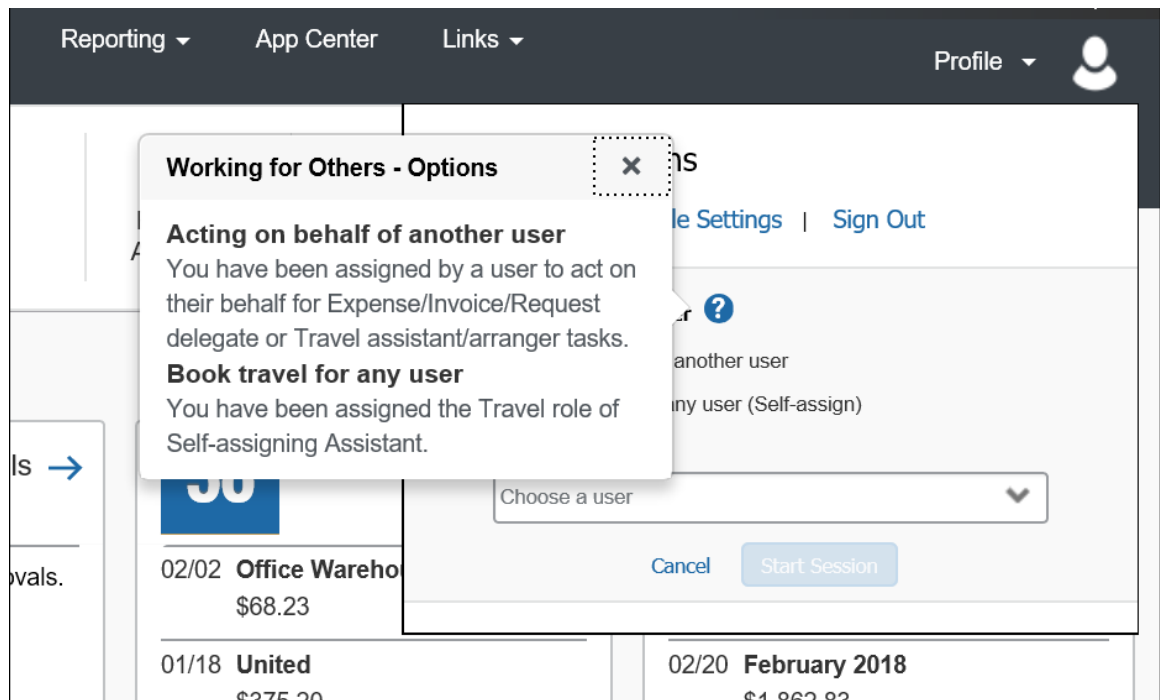


To clarify, that means a user can use the Tab key to access the icon and then the spacebar or Enter key to access the Quick Help information.

In this sample, the user tabs from **Profile Settings** to **Sign Out** to the  icon.



Once on the icon, the user presses the spacebar or the Enter key to access the Help text.



Configuration/Feature Activation

At the March release, the feature became available automatically; there are no additional configuration or activation steps.

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

All companies must take all reasonable steps to protect the personal and sensitive information of their employees. As per recommended security-related best practices, remember that custom fields should not contain personal and sensitive data.

⚠ IMPORTANT: Data in custom fields is not encrypted. The client is solely responsible for any liability resulting or arising from improper use.

If your company is currently using custom fields to store personal or sensitive data (for example, Social Security numbers, family member names, or any other personally identifying information), you should plan to remove this information from your existing fields within the service and modify your current configuration.

Next Steps

For information about your configuration and the use of custom fields, contact Concur Customer Support or your Account Manager.

Update: Users by Browser Report – North America Data Center Only

Overview

In the March release notes, we described the updates to the Users by Browser report.

	A	B	C	D	E	F	G	H	I
1	Login Name	Email	First Name	Last Name	Last Login Date (UTC)	IP Address	Browser	Login Count	
2	mp.com		Melissa		2/28/2018 8:03		Chrome64	4	
3	mp.com		Marta		2/28/2018 1:21		IE11.0	1	
4	amp.com		Danielle		2/28/2018 1:23		IE11.0	1	
5	ootcamp.com		Greatest		2/28/2018 1:25		IE11.0	1	
6	ootcamp.com		Jaime		2/28/2018 1:28		IE11.0	1	
7	ootcamp.com	camp.com	Randa		2/27/2018 15:52		Chrome64	36	
8	com		Never		2/28/2018 15:34		Chrome64	8	
9	camp.com		Trainee		2/28/2018 1:19		IE11.0	2	
10	camp.com		Marta		2/28/2018 1:20		IE11.0	3	
11	mp.com	@gmail.com	Andreas		3/1/2018 7:51		IE11.0	14	
12	bootcamp.com	camp.com	Wisam		2/7/2018 14:33		Chrome64	5	
13	mp.com	com	Brian		3/1/2018 7:59		Edge15.15063	8	
14	ootcamp.com		Paula		2/28/2018 1:28		IE11.0	1	

Be aware that the updated report is currently available **only** to customers using the North America data center. The report will be updated for customers in the remaining data centers in a future release.

Configuration / Feature Activation

This update occurred automatically in March for customers using the North America data center.

Audit Rules

New Custom Audit Rules Now Possible for Mileage via Concur's Mobile App

Overview

For clients who use the Concur Drive feature, SAP Concur now provides an enhanced ability to configure mileage-related audit rules for data expensed via this feature.

NOTE: Concur Drive refers to the feature that is enabled from **Concur's mobile app > Mileage > Auto Tracking**. To enable Concur Drive, contact Concur Customer Support.

With this release, two new fields are available: **Allow Maps** and **Route Source**. With these new fields, it is possible to configure custom audit rules for the following situations:

- **Drive Not Used:** When a user claims a Personal Car Mileage expense and they have not used Drive, they are forced to enter a comment.
- **Drive Policy Reminder:** When a user has not used Drive, they are reminded by a warning exception message.
- **Mileage Route Required:** When a user does not have a mapped route, they are presented with an exception instructing them to add a route.

BUSINESS PURPOSE/CLIENT BENEFIT

These new data fields give admins greater visibility into and control over how mileage is expensed by their users.

What the Admin Sees

New fields are available on the **Audit Rules** page for use with Concur Drive.

Name	Event	Exception Code	Editable By	Applies To	Active
Airfare Limit	Entry Save	CESVARN	Global	Global	No
Airfare Payment Method	Entry Save	CESPAY	Global	Global	No
Airfare Preferred Vendor	Entry Save	CESPREF	Global	Global	No
Amount Due Employee	Report Submit	CESVARN	Global	Global	No
Bank Account Currency Check	Report Submit	NOTBACRN	Global	Global	Yes
Breakfast Limit	Entry Save	CESINFO	Global	Global	No
Business Meal Limit	Entry Save	CESVARN	Global	Global	No
Car Rental Limit	Entry Save	CESVARN	Global	Global	No
Car Rental Payment Method	Entry Save	CESPAY	Global	Global	No

ALLOW MAPS FIELD

Select Field

Select a field from the list. The fields that appear pertain to the Data Object you selected.

- Airline Fee Type Code
- Allow Maps**
- Amount
- Amount-Daily Total
- Amount-Daily Total (multiple expense types)
- Amount-Monthly Total
- Amount-Monthly Total (multiple expense types)
- Amount-Weekly Total
- Amount-Weekly Total (multiple expense types)
- Amount-Yearly Total
- Amount-Yearly Total (multiple expense types)
- Approved Amount
- Arrival Date (Hotel E-Receipt)
- Average Cost Per Attendee
- Average Cost Per Attendee (attendee count plus 1)

Conditions

1 Audit Rule 2 **Conditions** 3 Exception

Insert Remove

Value Personal Car Mileage

And Or

Entry Route Source

Equal

Value None

And Or

Entry Allow Maps

Value

Cancel <<Previous Next>>

ROUTE SOURCE FIELD

Audit Rules

Custom
Random
Validation

1 Audit Rule
2 Conditions
3 Exception

Insert
Remove

Data Object/Operator	Field/Value	Operation
☐	Entry Expense Type	
☐	Value Personal Car Mileage	
☒ And ☐ Or		
☐	Entry Route Source	
☐	Value	

Return Date (Car Rental E-Receipt)
Round Trip Deduction
Route Source
Segment Type Key
Source
Source/Type Classification
Start Date (Booked)
State/Province
Tax Source
Ticket Number
Ticket Number Mismatch
Total Days (Booked)
Total Invoice Amount (Hotel E-Receipt)
Total Reclaim Adjusted Amount
Total Reclaim Posted Amount
Total Tax Adjusted Amount
Total Tax Posted Amount
Transaction Date
Transaction Type
Transaction-Daily Total (multiple expense types)
Transaction-Monthly Total (multiple expense types)
Transaction-Weekly Total (multiple expense types)

Cancel
<<Previous
Next>>

Configuration/Feature Activation

These fields are automatically available; there are no additional configuration or activation steps.



For more information, refer to the *Expense: Audit Rules Setup Guide*.

Budget

Budget Release Notes

Overview

Clients can view new budget functionality and enhancements in the new Budget Release Notes which are located on the same page as the other product release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Concur's Platform

Callout Server Requirements Update - Upgrade Postponed

SAP Concur has postponed the previously scheduled maintenance (Monday, April 16 at 10 am PST) of the servers that support the Concur Platform Callouts.

More information will be available in future Release Notes.

Expense Pay – Global

Additional Card Programs Now Supported for CAD

Overview

Expense Pay – Global for Expense now supports the following credit card program for the Canadian Dollar (CAD \$):

- Bank of America MasterCard CAD
- Bank of America Visa CAD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

The screenshot shows a web form titled "Add New Card Program" with a close button (X) in the top right corner. The form contains the following elements:

- Program Name:** A text input field.
- Payment Type:** A dropdown menu.
- Program Type:** A dropdown menu, which is highlighted with a red oval. To its right is a blue link labeled "Verify IIN".
- Currency:** A text input field.
- Active:** A dropdown menu currently set to "Yes".
- Classic:** An unchecked checkbox.
- Global:** An unchecked checkbox.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

In-Product Messaging (IMP)**Opt Out of In-Product Messaging (United States)****Overview**

Last year, when in-product messaging was introduced in Europe, the feature included the ability for users to opt out of messaging.

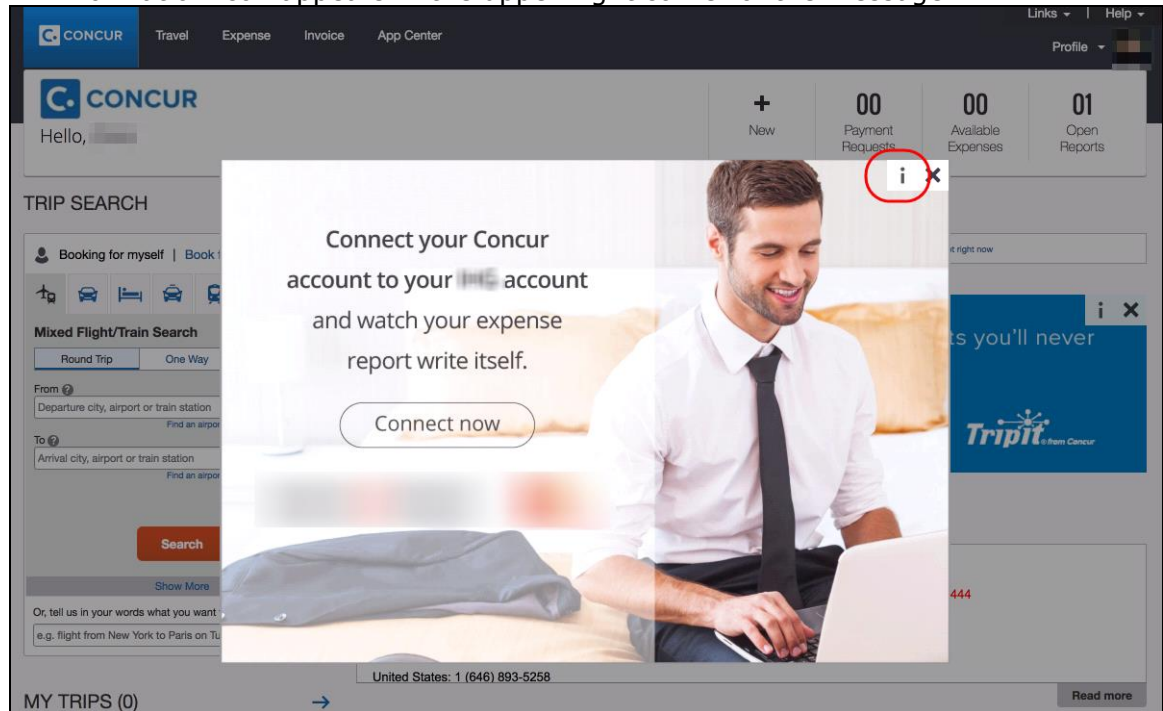
With this release, SAP Concur will provide customers in the United States the ability to opt out.

BUSINESS PURPOSE / CLIENT BENEFIT

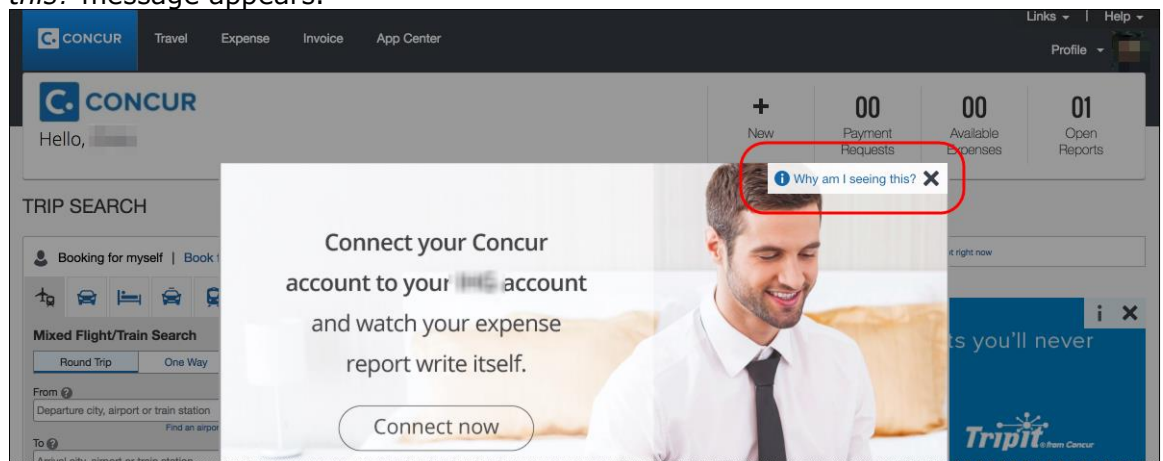
Users in the United States can opt out of in-product messaging.

What the User Sees**POPUP MESSAGES**

An information icon appears in the upper-right corner of the message.

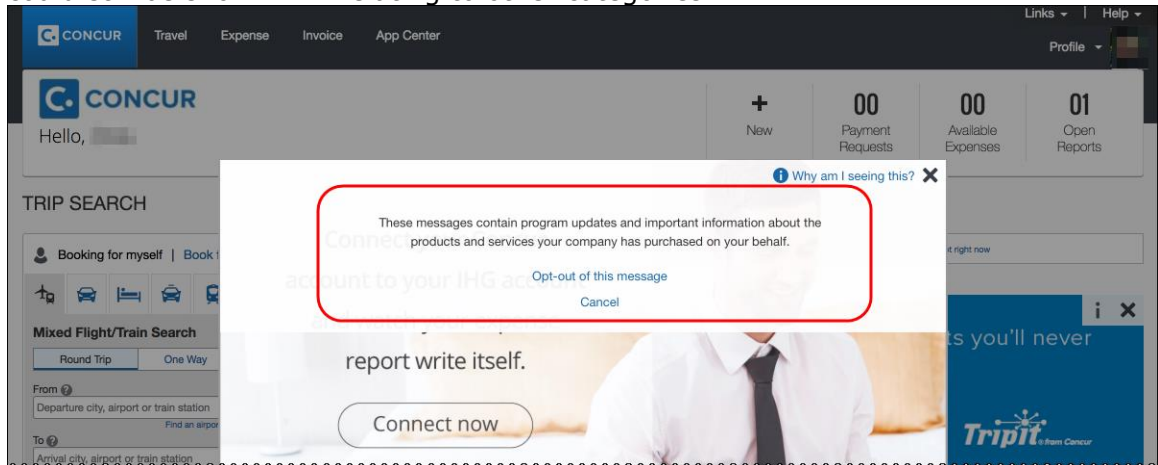


When the user clicks it or hovers the mouse pointer over it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user

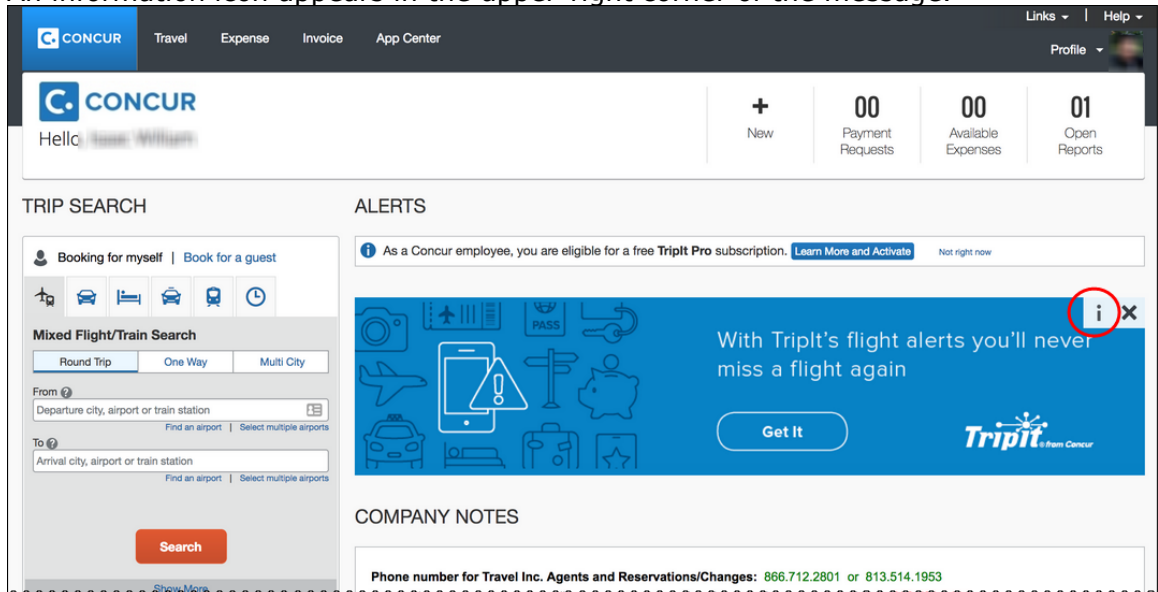
could still be shown IMP relating to other categories.



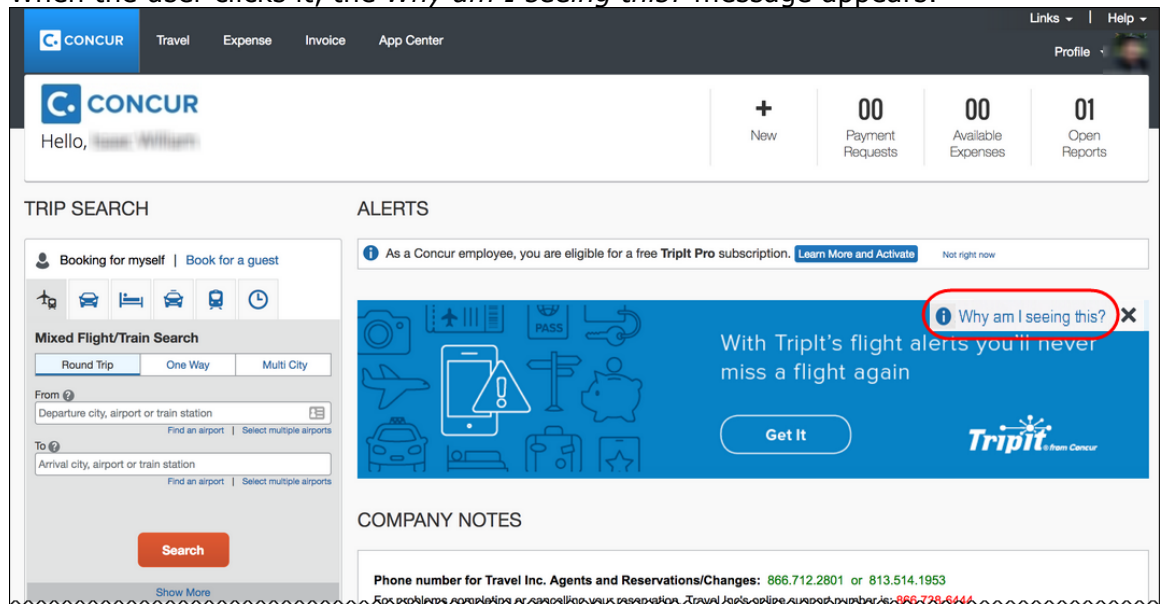
When the user clicks the close button (X in the upper-right corner), the popup closes.

IN-PAGE MESSAGES

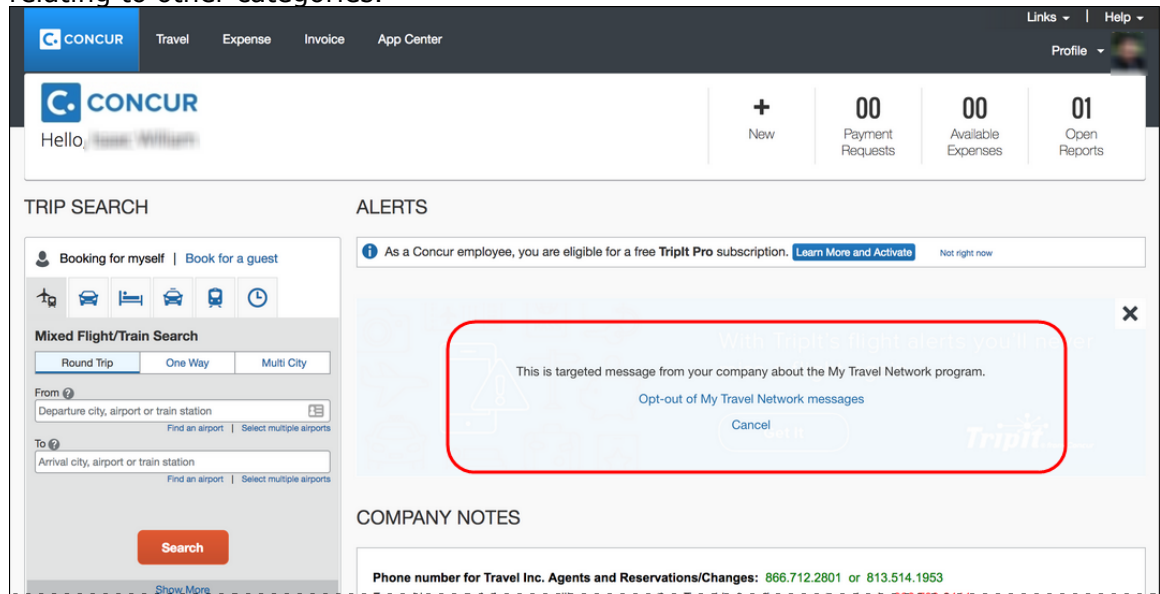
An information icon appears in the upper-right corner of the message.



When the user clicks it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this message as well as a link for the user to click to opt out of seeing similar messages in the future. The user could still be shown IPM relating to other categories.



When the user clicks the close button (X in the upper-right corner), the message collapses and is removed from the page entirely.

Configuration / Feature Activation

The change will occur automatically. There are no additional configuration or activation steps.

Japan Public Transport (JPT)

IC Card Readers Will Support Company-Level Authentication

Overview

The IC Card Reader solution will switch authentication processes during the weekend of April 14th and 15th, 2018.

The scheduled maintenance times are as follows:

- Saturday, April 14th, 2018 from 10:00 am to 2:00 pm Japan Time (Friday, April 13th, 2018 from 6:00 pm to 10:00 pm PDT)
- Sunday, April 15th, 2018 from 1:00 pm to 4:00 pm Japan Time (Saturday April 14th, 2018 from 8:00 pm to 0:00 am PDT)

BUSINESS PURPOSE/CLIENT BENEFIT

This change will simplify user activation and allow transactions to show more quickly in **Available Expenses**.

What the User Sees

Users should be aware of these three important changes.

1. During maintenance time, users will not be able to read and send IC Card transaction to Concur Expense.
2. After this change, the User Activation step will become unnecessary. This step is currently described in the *Expense: Japan Public Transportation User Guide*.

NOTE: This change will apply only for the users of the Pit Touch Pro2 IC Card Reader device. For Android Tablet type IC Card Reader device users, the user activation process will not change.

3. After this change, multiple not-yet-sent train transactions will reach Concur and show in **Available Expenses**. If the current authentication per user failed (i.e. token expired) and the user has not done re-activation with an activation email, train usage transactions retain a "not sent" status. Such not-yet-sent transactions will be sent by a daily automatic retry process after this change.

Configuration/Feature Activation

Concur will automatically implement these changes; there are no configuration or activation steps.

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

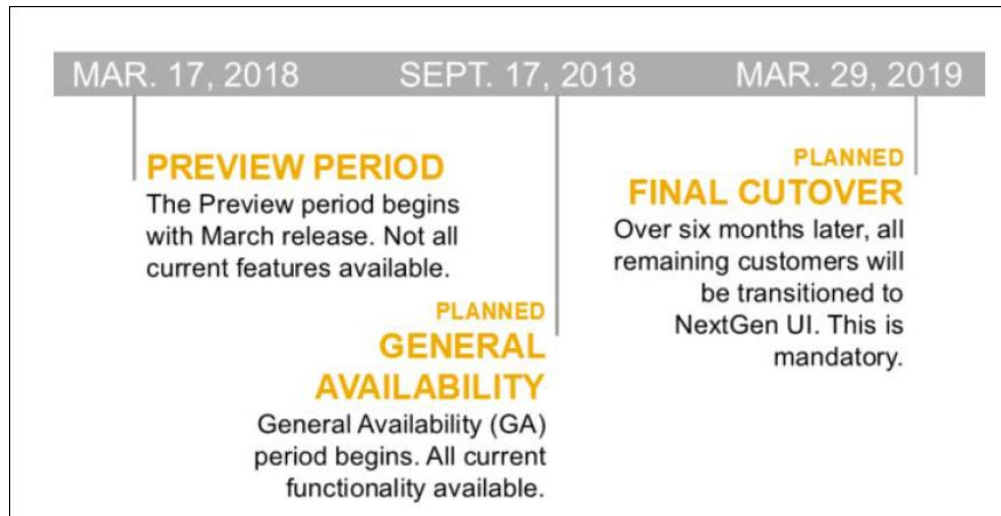
****Ongoing** New User Interface for Concur Expense End Users**

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.



BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Travel Allowance

(Czech Republic) Meal Allowance Updates

Overview

A change has been made to the meal allowance rates for foreign travel. If the foreign location duration for the day is more than 18 hours, the employee is entitled to 100% of the allowance for the foreign location. Prior to this change, 18 hours was required for this allowance, but now the stay must be more than 18 hours to receive this allowance.

BUSINESS PURPOSE/CLIENT BENEFIT

This change maintains correct calculations.

Configuration/Feature Activation

The update is automatically available; there are no additional configuration or activation steps.



For more information, refer to the *Travel Allowance Configuration Guide – Czech Republic*.

(Finland) Location Updates

Overview

Updates have been made to the rules for determining the travel allowance location. The following rules no longer apply:

- Allowance location is based on the last international location visited if there is a minimum of 10 hours of international travel in a 24-hour day.
- If the international time spent does not meet the minimum of 10 hours, the domestic allowance rate is used.

For both the above scenarios, day ending in transit departing from a foreign location is also considered.

BUSINESS PURPOSE/CLIENT BENEFIT

This change maintains correct calculations.

Configuration/Feature Activation

The update is automatically available; there are no additional configuration or activation steps.



For more information, refer to the *Travel Allowance Configuration Guide – Finland*.

(Poland) Option "Use Border Cross Time" is Now Available

Overview

The country-specific option, **User Border Cross Time**, is now available for the Travel Allowance Poland feature.

BUSINESS PURPOSE/CLIENT BENEFIT

This change provides greater functionality for users of the Travel Allowance Poland feature.

Configuration/Feature Activation

The update is automatically available; there are no additional configuration or activation steps.



For more information, refer to the *Travel Allowance Configuration Guide – Poland*.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expense Reports**

More information will be available in future Release Notes.

****Planned Changes** Removing the "Privacy Agreement" Page**

Overview

For customers who currently display the **Privacy Agreement** page to users, be aware that – targeted for May – SAP Concur will eliminate that page. That means, the privacy agreement will no longer display, under any circumstances. In addition, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

In a separate release, SAP Concur will provide a standard privacy statement, which can be accessed via a link in the page footer.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur privacy statement.

FAQs

Q. Why can't I continue using this feature?

A. SAP Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within SAP Concur services.

Q. When will the existing **Privacy Agreement** page be removed?

A. Targeted for May, the page will be removed; users will no longer see the privacy agreement – whether customized or generic.

Between now and May, if you want to remove your customized privacy agreement from the **Privacy Agreement** page, you can. For customers who have access to the custom text option or the privacy agreement settings, you can make those changes yourself. For customers who do not have access to

the custom text option or the privacy agreement settings, you can contact Concur Customer Support for assistance.

No action is necessary. You do not have to make changes now unless you want to.

Q. What will SAP Concur provide in place of the current **Privacy Agreement** page?

A. Some customers have used the **Privacy Agreement** page to convey company-specific information to its users. That option will no longer be available. Instead, the SAP Concur privacy statement – accessible via a link the page footer – will describe SAP Concur's processing activities of customer data.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Customers must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. When the new SAP Concur privacy statement is implemented, will I be able to modify it or require that users accept it?

A. The SAP Concur privacy statement will not be configurable by customers in any way. Its function is to describe SAP Concur's processing activities of customer data.

Q. Who can I contact for more information?

A. You can contact Concur Customer Support for additional information regarding these settings and/or Concur's updated privacy statement.

Configuration / Feature Activation

The **Privacy Agreement** page and associated configuration options will be automatically removed. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

****Planned Changes** New Privacy Statement Planned for May Release**

Overview

In the release note named ***Planned Changes** Removing the "Privacy Agreement" Page*, we describe changes that will occur when the current customizable privacy policy is discontinued. We also discuss the new Privacy Statement that SAP Concur will provide as a requirement of being a "processor" of customer data.

NOTE: Be aware that the term "processor" here is **not** at all related to the Processor roles found in most SAP Concur products.

The intent is to replace all occurrences of customized or unique policy text – ***in all SAP Concur products and the mobile app*** – with the SAP Concur Processor Privacy Statement, which describes our processing activities of customer data.

Be aware that the new text will be available soon, targeted for May.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur privacy statement.

Configuration / Feature Activation

The change will occur automatically; there are no additional configuration or activation steps.

Company Card

**** Planned Changes ** Addition of Income and Transfer Transaction Categories to Yodlee**

Overview

In an upcoming release, users of Yodlee will be able to work with transaction data from the **Income** and **Transfer** categories. Currently, transactions falling into either of these categories are set as undefined and hidden by the system. With the upcoming change, these transactions will now be correctly categorized for the client.

Please note that this feature enhancement will still filter out transactions categorized as payment or account settlement because they are not expense-report related. As the integration is based on an individual registration, the end user would delete what is not eligible to expense report reimbursement.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement extends the scope of what flows into Concur allowing clients to process their card transactions by bringing support for the missing **Income** and **Transfer** categories to the Expense product.

Configuration/Feature Activation

This new mapping is not configurable and will be automatically available to all clients; there are no activation steps.

Data Retention

****Planned Changes** New Feature for Outdated Data**

Overview

This new feature will allow clients to control how long Concur stores their data based on who, when, and where criteria.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

When this feature becomes available, and if it has been requested via Concur Customer Support, then on the **Company Admin** page, the client admin will see a **Data Retention** link.

More information will be available in future versions of these Release Notes.



When this feature becomes available, for more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this feature becomes available, you may request that it be enabled for your company by contacting Concur Customer Support.

New Filter

****Planned Changes** New 23-Month Filter**

Overview

NOTE: This release note supersedes the January release note: *Available Expenses | **Planned Changes** New One-Year Filter*.

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View Transactions
- Unassigned Cash Advances

 **IMPORTANT:** Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Under View Transactions, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | **Planned Changes** New Feature for Outdated Data* release note included in this month's Planned Changes section of these Release Notes.

Plain Text File Transfer Protocol

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

SAP Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

The screenshot displays the Concur Expense Administration Help interface. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The main content area is titled "Resources for Administrators - Professional Edition" and lists various resources such as "Using Online Help", "Legal Notice", "Resources for Administrators - Professional Edition", "Expense Professional Administration Guides", "Budget Administration Guides", "What's New - Professional Edition", "Release Note Admin Summaries (Translated, HTML Format) - Professional Edition", and "Profile". A red circle highlights the "Resources for Administrators - Professional Edition" link. A red arrow points from this link to a second screenshot below, which shows the "Expense Professional Administration Guides" page. This page also lists various resources, including "Using Online Help", "Legal Notice", "Resources for Administrators - Professional Edition", "Expense Professional Administration Guides", "Budget Administration Guides", "What's New - Professional Edition", "Release Note Admin Summaries (Translated, HTML Format) - Professional Edition", and "Profile". A red circle highlights the "Expense Professional Administration Guides" link. A red arrow points from this link to a table of guides.

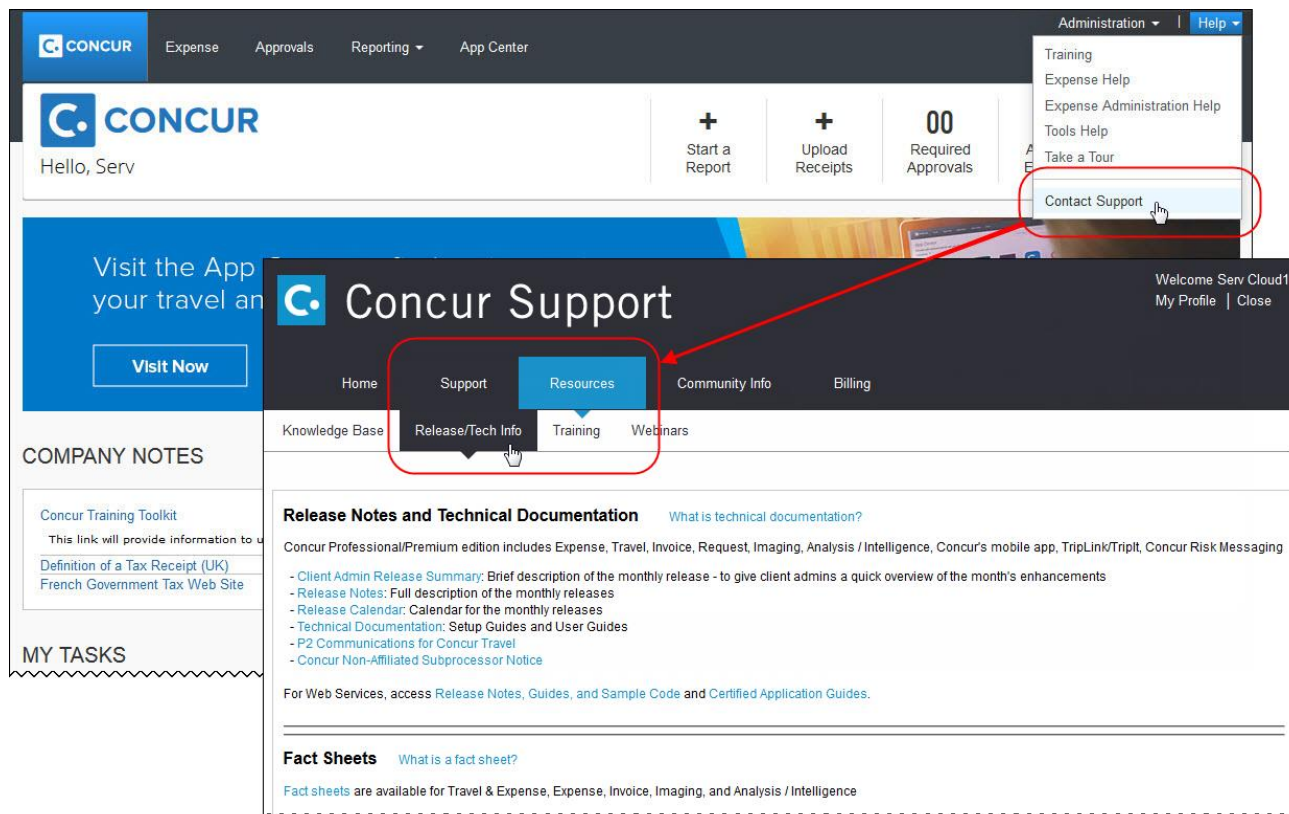
Expense Setup Guides (English Only)	Format (English Only)
Account Codes	PDF
Allocations	PDF
Attendees	PDF
Audit Rules	PDF
Audit Rules (Validation Rules)	PDF
Budget Insight	PDF
Car Configuration	PDF
Cash Advance	PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

Additional Release Notes and Other Technical Documentation: Concur Support Portal – Selected Users

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



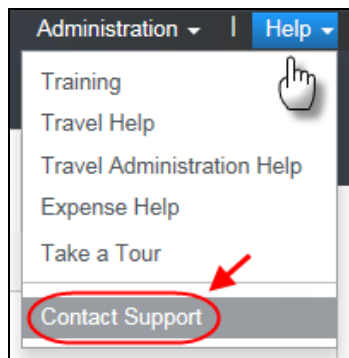
Cases

Steps for Getting a Status

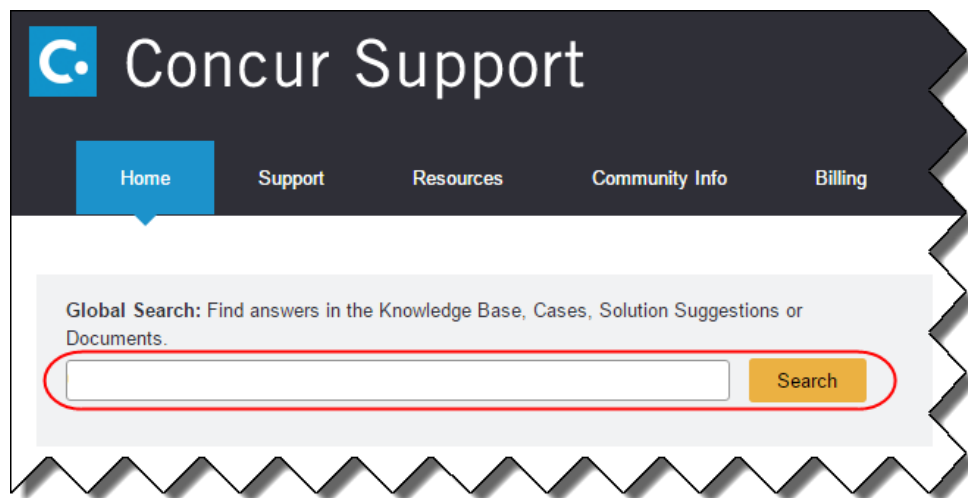
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

April Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11490864	Japan Public Transport Screen unresponsive while attempting to edit multiple expenses from network IC card entries.
11149322	<i>SAP Concur has edited the code and corrected this issue. It is consistently possible to edit multiple expenses.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: May 12, 2018 Update #2: Tuesday, May 15, 3:30 PM PT	Client FINAL

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Release Notes

Admin

New Cookie Preferences Link in the SAP Concur Footer

Overview

During the May 12 release, some cookie-related process changes and links were introduced because of specific consent requirements in Europe.

There are two types of consent when allowing cookies to be saved on the user's computer. As described on the following pages, each country decides which option to use. The options are:

- **Active consent:** The user actively agrees to accept cookies. In this case, SAP Concur is required to obtain user consent before loading any cookies on a user's computer.
- **Passive consent:** The user does not prevent cookies.

IMPORTANT

This release note discusses consent for and modification of cookies. Note the following:

- TrustArc, a global privacy and data governance provider, monitors and manages the cookie-related processes for SAP Concur.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. ***There is no option for companies to make these choices for their users.***
- Once a user has accepted cookies, they cannot modify their cookies options to stop accepting cookies.
- Concur is taking a phased approach to some of these changes. For example, not all clients will immediately see the **Cookie Preferences** link (described below). In addition, over the next two weeks, some of the options may have subtle changes. Regardless, all changes will be available and in effect by May 25.

BUSINESS PURPOSE/CLIENT BENEFIT

These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

What the user sees depends on the country in which the user is located. Each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

⚠ IMPORTANT: Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.

As the user is signing in to SAP Concur, TrustArc identifies the country associated with the user and determines if user consent is active or passive.

ACTIVE CONSENT REQUIRED

If active consent is required – before the user can access any SAP Concur page – the user sees the **About cookies on this site** window.

About cookies on this site

SAP Concur 

Cookies are important to the proper functioning of a site. To improve your experience, we use cookies to remember log-in details and provide secure log-in, collect statistics to optimize site functionality, and deliver content tailored to your interests. Click Agree and Proceed to accept cookies and go directly to the site or click on View Cookie Settings to see detailed descriptions of the types of cookies and choose whether to accept certain cookies while on the site.

Agree and Proceed

View Cookie Settings »

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by:  TrustArc | TRUSTe

The user can:

- Read the agreement text and then click **Agree and Proceed**; the user is then directed into SAP Concur.
– **or** –
- Click **View Cookie Settings** to see other options.

NOTE: The user cannot bypass this page. If the user chooses to **not** accept cookies, the user cannot access SAP Concur.

If the user clicks **View Cookie Settings**, this page appears.

About cookies on this site



Please choose whether this site may use Functional and/or Advertising cookies, as described below:

—

REQUIRED COOKIES

These cookies are required to enable core site functionality.

—

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

—

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

[Privacy Policy](#) | Powered by:  TRUSTe

On this page, the user can slide the bar on the left to accept:

- **Required cookies:** Those required to use SAP Concur services.
- **Required and functional cookies:** Required cookies *plus* those used for performance and usage analysis.
- **Required, functional, and advertising cookies:** Required cookies *plus* functional cookies *plus* cookies used for advertisements.

The user can:

- Click **Cancel** and return to the previous page.
— **or** —
- Slide the bar to make their choice and then click **Submit Preferences**.
— **or** —
- Click **Advanced Settings**.

If the user clicks **Advanced Settings**, they will have a read-only view of the existing cookies.

Once the user consents, the requirement is satisfied and the window does not appear again.

PASSIVE CONSENT

In some countries, once the user has accessed SAP Concur, a banner similar to the one below appears at the top of the SAP Concur page.

By using the SAP site, you agree with our use of cookies.

[I consent to cookies](#) [Want to know more?](#)

Whether or not the user actively consents, consent is implied. The user can continue to work in SAP Concur and the banner does not interfere with the user's tasks; however, the banner remains until the user clicks **I consent to cookies**.

The user clicks **Want to know more?**, the user sees the cookie options (as described previously).

About cookies on this site

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

—

REQUIRED COOKIES

These cookies are required to enable core site functionality.

—

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

—

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

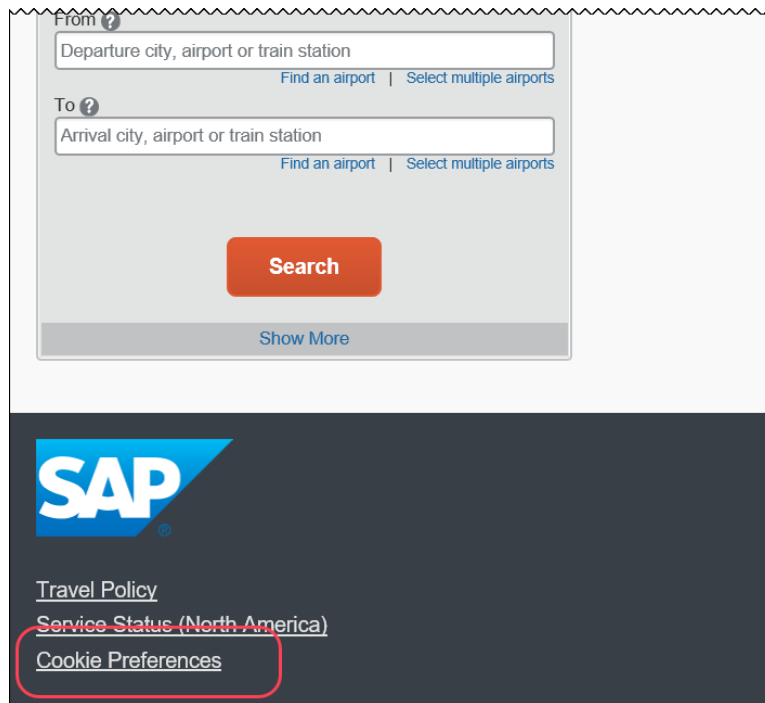
Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by: [TrustArc](#) | TRUSTe

Once the user consents, the requirement is satisfied and the banner does not appear again.

MAKING CHANGES

Certain users will see the **Cookie Preferences** link in the footer.



The screenshot shows a search interface with two input fields: "From" (Departure city, airport or train station) and "To" (Arrival city, airport or train station). Each field has a "Find an airport" link and a "Select multiple airports" link. A red "Search" button is centered below the fields. At the bottom of the search area is a "Show More" link. Below the search area is a dark footer containing the SAP logo, a "Travel Policy" link, a "Service Status (North America)" link, and a "Cookie Preferences" link which is highlighted with a red rounded rectangle.

This link allows users to view their existing cookie settings and make adjustments, if desired. Over time, all users will see this link and be able to modify their cookie settings.

Configuration/Feature Activation

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

Privacy Agreement Page Removed; New SAP Concur Privacy Statement

Overview

For customers who currently display the **Privacy Agreement** page to users, be aware that – with this release – SAP Concur will eliminate that page. That means, the existing **Privacy Agreement** page will no longer display, under any circumstances. With that, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

Also with this release, SAP Concur will provide a standard privacy statement, which can be accessed via a link in the page footer. The new SAP Concur Privacy Statement describes SAP Concur's responsibility as a "processor" of customer data.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur Privacy Statement.

What the User Sees

With this release, a user can access the new SAP Concur Privacy Statement by clicking the **Processor Privacy Statement** link in the lower-left corner of any page in the web version of Concur. A user can also access it by clicking the **Privacy Policy** link in Settings in the SAP Concur mobile app.

"PROCESSOR" OF CUSTOMER DATA

The new privacy statement is required because SAP Concur is a "processor" of customer data.

 **IMPORTANT:** Be aware that the term "processor" here is **not** at all related to the Processor roles found in most SAP Concur products.

PRIVACY STATEMENT TEXT

The new SAP Concur Privacy Statement text is available here:

<https://www.concur.com/en-us/processor-privacy-statement>

FAQs

Q. Why can't I continue using the existing **Privacy Agreement** page?

A. SAP Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within SAP Concur services.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Some customers have used the **Privacy Agreement** page to convey company-specific information to its users. That option is no longer available. Customers must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. Will I be able to require that users read and accept the privacy statement before being able to access the SAP Concur service?

A. The SAP Concur Privacy Statement will not be configurable by customers in any way. Its function is to describe SAP Concur's processing activities of customer data.

Configuration / Feature Activation

This change will occur automatically; there are no additional configuration or activation steps. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

****UPDATE** Processor Privacy Statement Link – Available This Week**

Overview

For the past few months, the release notes stated that – for the May 12 release – the existing **Privacy Agreement** page would be retired and the new **Processor Privacy Statement** link would become available in the lower-left corner of the SAP Concur footer.

In fact, the **Privacy Agreement** page has been removed but the **Processor Privacy Statement** link is not yet available. Additional changes are being made so the **Processor Privacy Statement** link will appear in the footer this week.

NOTE: In the *New Cookie Preferences Link in the SAP Concur Footer* release note below, note that there is a **Privacy Policy** link at the bottom of the **About cookies on this site** window. Users can view the new privacy statement there, if desired, until the **Processor Privacy Statement** link becomes available later this week.

Configuration/Feature Activation

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

SAP Concur Updating to sap.com Email Addresses

Overview

SAP Concur is updating our employee's outgoing email to use sap.com instead of concur.com email addresses. This means clients will receive email communications from both domains. Clients may want to contact their IT department to add "sap.com" to their email whitelist.

Communications sent to SAP Concur using the concur.com email addresses will continue to be supported, including:

- plans@concur.com
- receipts@concur.com

and all other existing concur.com email addresses.

BACKGROUND

In January of this year, we shared with you our evolution to the SAP Concur logo and brand. As part of our evolution to the SAP Concur brand, and as we continue to leverage the assets available to us as members of the SAP family, you can expect to see email communication from Concur that may come from the @sap.com email domain, in addition to @concur.com. Rest assured, communication from either address will be from the same person, and you can engage with us via either address.

BUSINESS PURPOSE / CLIENT BENEFIT

SAP Concur is moving to the SAP brand, which includes updating email communications to use email addresses on the sap.com domain.

Configuration / Feature Activation

SAP Concur made this change automatically on April 14, 2018. Clients do not need to make any changes to their existing processes.

Budget

Budget Release Notes

Overview

Clients can view new budget functionality and enhancements in the new Budget Release Notes which are located on the same page as the other product release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Company Card

Addition of Income and Transfer Transaction Categories to Yodlee

Overview

With this release, users of Yodlee are now able to work with transaction data from the **Income** and **Transfer** categories. Prior to this change, transactions falling into either of these categories were set as undefined and hidden by the system. With this change, these transactions are now correctly categorized for the client.

Please note that this feature enhancement will still filter out transactions categorized as payment or account settlement because they are not expense-report related. As

the integration is based on an individual registration, the end user would delete what is not eligible to expense report reimbursement.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement extends the scope of what flows into Concur, allowing clients to process their card transactions by bringing support for the missing **Income** and **Transfer** categories to the Expense product.

Configuration/Feature Activation

This new mapping is not configurable and is now automatically available to all clients; there are no activation steps.

Change to AMEX GL 1022 “No Vendor Supplied” Card Feed Data Handling

Overview

With this release, clients moving to the GL-1022 American Express card feed will note enhanced handling of the “American Express Initiated Activity” data to match that of the GL-1025 feed. With this upcoming change, data will yield values for **Merchant Name** and/or **Vendor Name** instead of returning a “No Vendor Supplied” message.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement updates the GL-1022 data reconciliation to match the behavior of the GL-1025 card feed.

Preparing for This Change

Clients whose audit rule definitions will trigger based on the existing *Vendor Name = No Vendor Supplied* feed return value should review and, if necessary, update these configurations to match the new behavior of the GL-1022 card feed.

Configuration/Feature Activation

Concur has automatically implemented this change.

Data Retention

New Early Access Feature for Outdated Data

Overview

SAP Concur has a new feature, Data Retention, that allows clients to control how long the Concur solution stores their data based on who, when, and where criteria. A new shared role, **Data Retention Administrator**, has been created in the system and is required for accessing this feature.

The feature provides the following functionality:

- Allows a company to set a specific amount of calendar time after which data such as old user profiles, itineraries, and expense reports will be removed.
- Provides for strict access to policy configuration with an email notification.
- Includes the ability to place a hold on a specific user whose data will be excluded by this feature when it is necessary or desirable to retain older data.
- Includes the ability to remove the data of a specific user independent of the company-wide data retention configuration.
- Provides a high-level summary of events to monitor data retention activities.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

If enabled by SAP Concur, at the bottom of the **Company Administration** page, the client admin will see a **Data Retention** link.

The screenshot displays the SAP Concur 'Company Administration' page. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, App Center, and Links. The main content area is titled 'Company Administration' and lists various administrative tasks. A red circle highlights the 'Data Retention' link in the bottom left section of the page.

Company Administration

- Company Admin**
 - Approval Queues
 - Billing Administrator
 - Company Locations
 - Menu Administrator
 - Org Unit Admin
 - Report Admin
 - Text Customization
 - Password Administrator
 - Manage Custom Fields
 - Calendar Integration Admin
 - Company Settings
 - Share Custom Fields
 - Login URL Manager
- User Administration**
 - User Administration
 - Add User
 - Self-Registration Setup
 - Self-Registration Approval
 - Send Mobile Instructions
 - User Permissions
 - Company Groups
- Travel Administration**
 - Corporate Ghost Cards
 - Virtual Payment Admin
 - E-Receipt Admin
 - Travel Admin
 - Travel Rule Builder
 - Travel Reporting
 - Travel Templates
 - Credit Card BIN Restrictions
 - Unused Tickets
 - Meeting Center Admin
 - Manage Corporate Discounts
 - Manage Segment Fees
- Risk Administration**
 - Risk Management
- Group Administration**
 - Shared Contact Categories
 - Shared Marketing Categories
 - Shared Todo Lists
 - Data Retention**

Additional Admin Links:

- Administer Approval Queue**: Here is where you reassign items from one manager to another, if a manager is unavailable for some reason.
- Meetings Admin**: Administer Meetings
- Group and Shared Resources Administration**: Manage groups of people, and shared resources like group calendars and group contacts.
- Organization Unit Administration**: Set up your company's organizational units/departments.
- Travel Meeting Center Admin Third Party**: Can manage Travel Meetings
- User Administration**: Here is where you add, modify and delete users.
- Billing Administrator**: View current and past bills.
- Company Locations and Maps**: Where are your offices? Modify your business locations.
- Menu Administrator**: Configure Concur menus to display URLs in our menu headings.
- Permission Administrator**: Who can access what? Setup your permissions (user classes) here.
- Travel Policy Administrator**: Administer your company's travel policy.

Footer:

CONCUR
 Travel Policy
 Service Status (North America)
 © Copyright 2018 - Concur - All Rights Reserved



For more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this early access feature becomes available as part of the May release, you may request that it be enabled for your company by contacting Concur Customer Support.

New 23-Month Filter

Overview

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View transactions
- Unassigned Cash Advances

 **IMPORTANT:** Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Using **View Transactions**, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | New Feature for Outdated Data* release note included in this month's Release Notes.

Expense Pay – Global

(Canada) Additional Card Programs Now Supported for CAD

Overview

Expense Pay – Global for Expense now supports the following credit card programs for the Canadian Dollar (CAD \$):

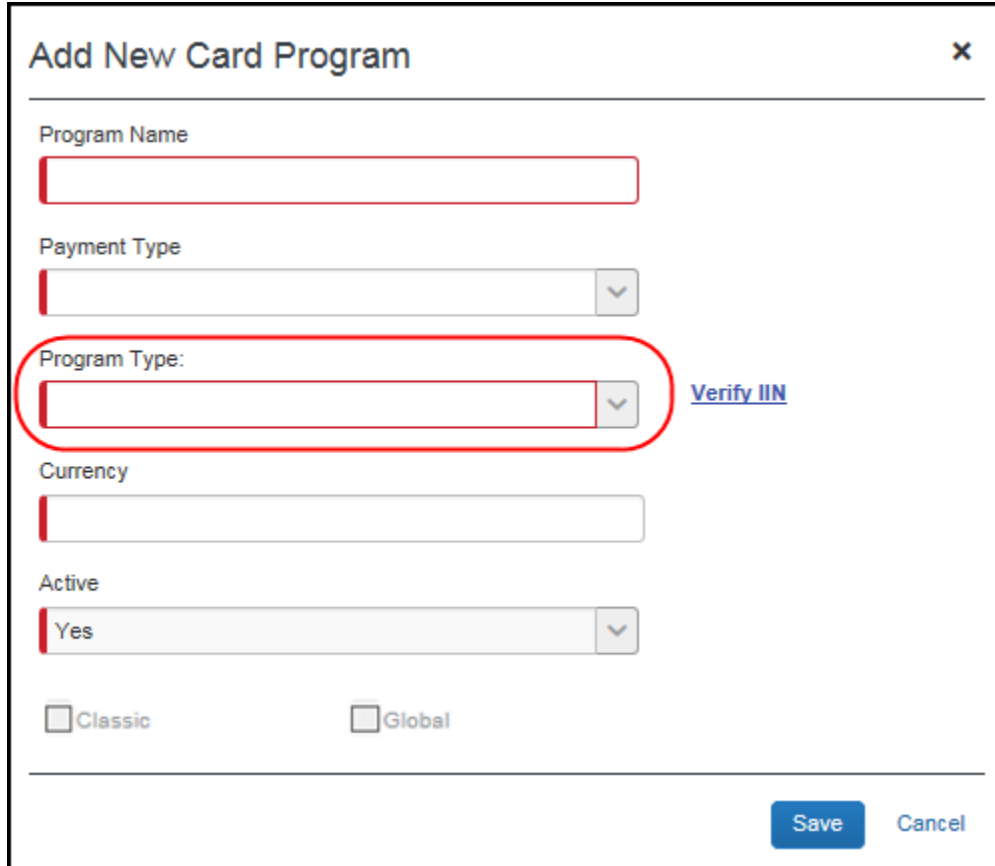
- Citibank MasterCard CAD
- Citibank Visa CAD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.



Add New Card Program ×

Program Name

Payment Type

Program Type:
 [Verify IIN](#)

Currency

Active

☐ Classic ☐ Global

Configuration/Feature Activation

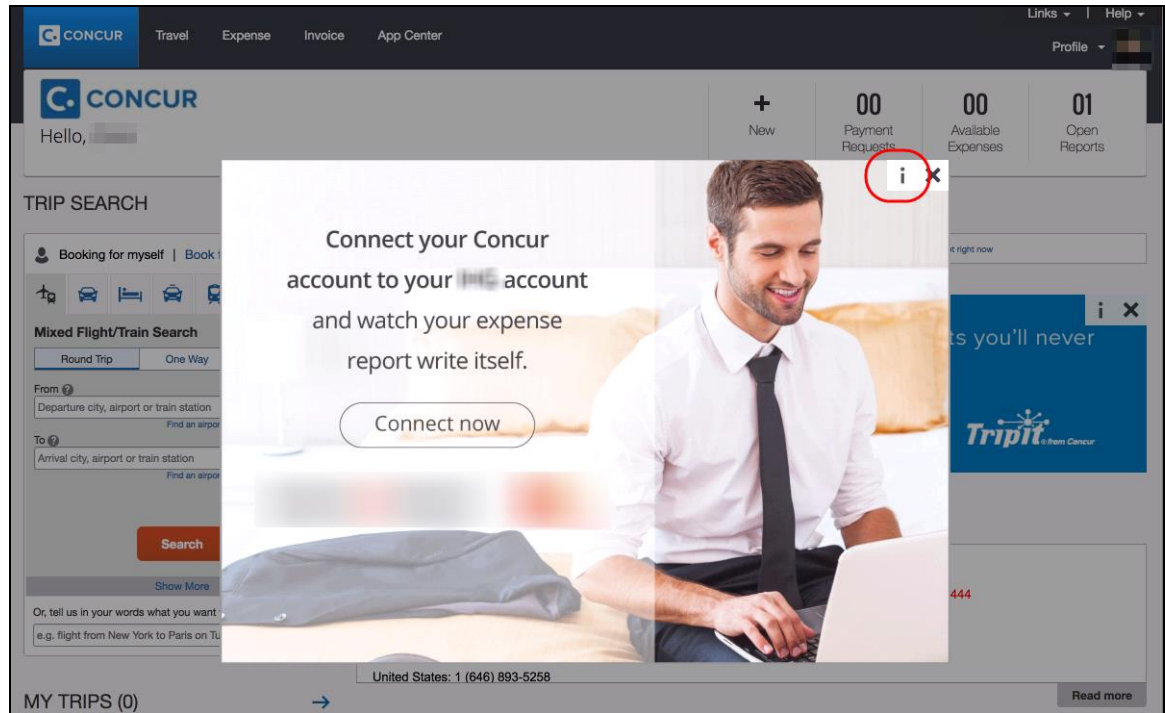
Concur automatically implemented these changes; there are no configuration or activation steps.

In-Product Messaging (IPM)

Clarification: Opt Out of In-Product Messaging

Overview

For the past few months, there have been release notes about users being able to opt out of in-product messaging (IPM).



Just to clarify:

- **For customers deployed to the EMEA Data Center**, users were provided the ability to opt out late last year.
- **For customers deployed to the North America Data Center**, users will be provided the ability to opt out in stages, with SAP Concur planning to have this feature fully available by the end of April.

⚠ IMPORTANT: There are certain messages of critical importance that a user cannot opt out of receiving, for example, messages asking the user to accept updated terms.

Configuration/Feature Activation

The ability to opt out occurs automatically; there are no additional configuration or activation steps.

Japan Public Transport (JPT)

IC Card Numbers Removed from Receipt Images

Overview

When Concur renders receipt images for Japan Public Transport (JPT), they will no longer include IC Card numbers.

NOTE: SAP Concur will not modify or replace existing receipt images that were rendered prior to this change.

BUSINESS PURPOSE/CLIENT BENEFIT

This change increases personal privacy for Concur users.

Configuration/Feature Activation

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

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

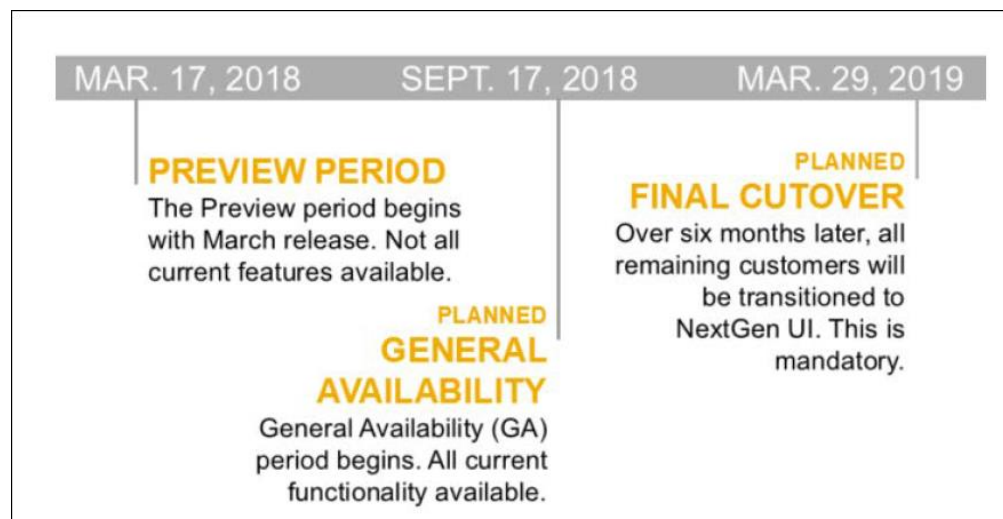
The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense****Ongoing** New User Interface for Concur Expense End Users****Overview**

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.

**BUSINESS PURPOSE / CLIENT BENEFIT**

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

SAP Concur's Platform

Callout Server Requirements Update

Overview

The SAP Concur servers that support the SAP Concur Platform Callouts are scheduled for an upgrade. This maintenance includes the Production Proxy Migration (North America Data Center only) and PWS Server Migration to VM (EMEA And North American Data Centers only). The PWS Server Migration to VM was completed on May 2, 2018. The Production Proxy Migration began on May 9, 2018 with one third of the traffic routed through the Production proxy. The other two thirds of the traffic is estimated to migrate through the Production proxy the week of May 14, 2018.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.
- Clients who whitelist access for Concur callout traffic from the North America Data Center (not common) may need to update their access control list (ACL) to IP 12.129.29.86.

 **IMPORTANT:** If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur will automatically implement these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expenses Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

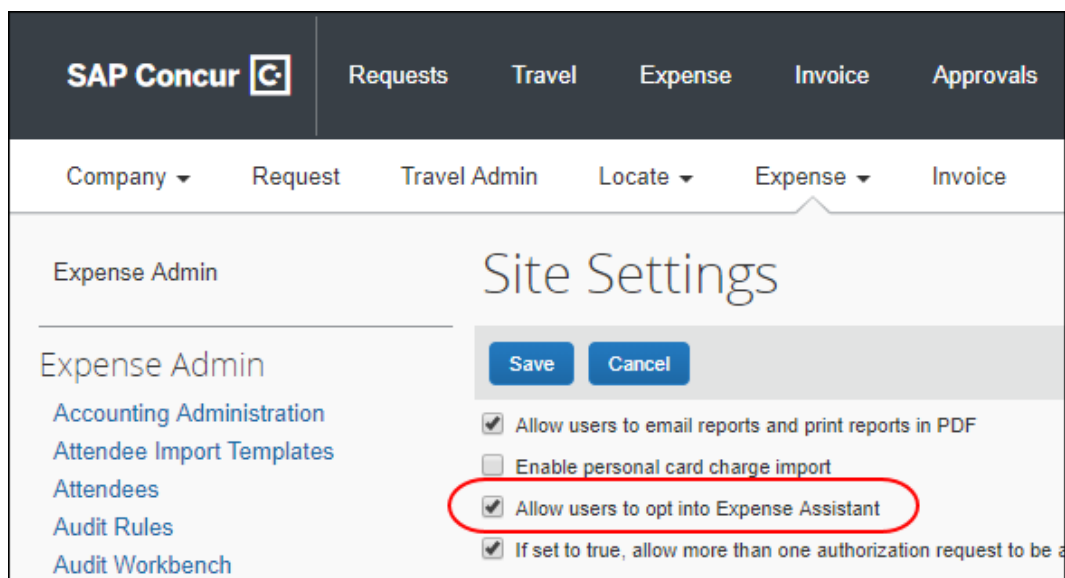
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration/Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

 **IMPORTANT:** Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.



IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

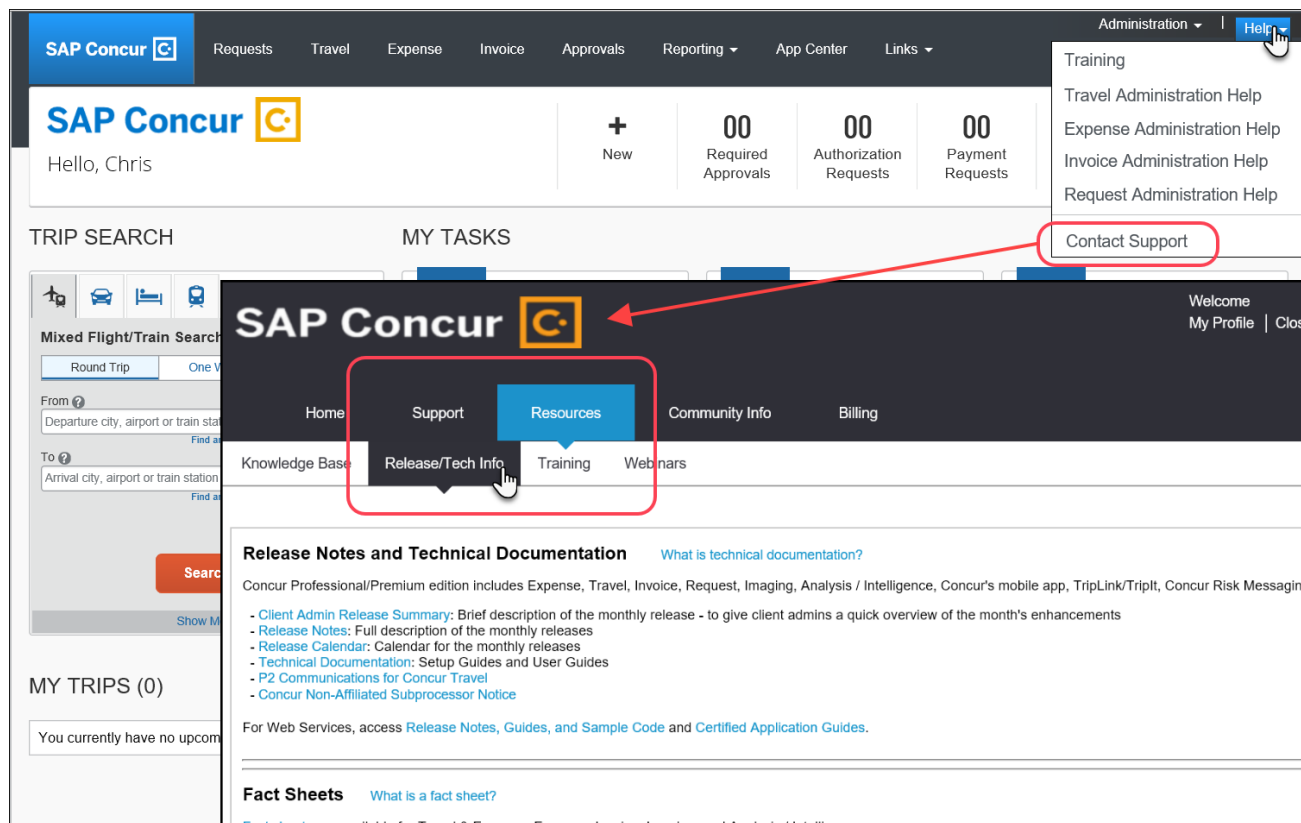
Expense Setup Guides

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



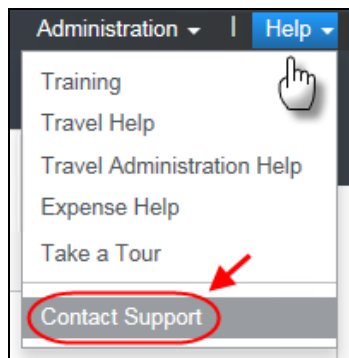
Cases

Steps for Getting a Status

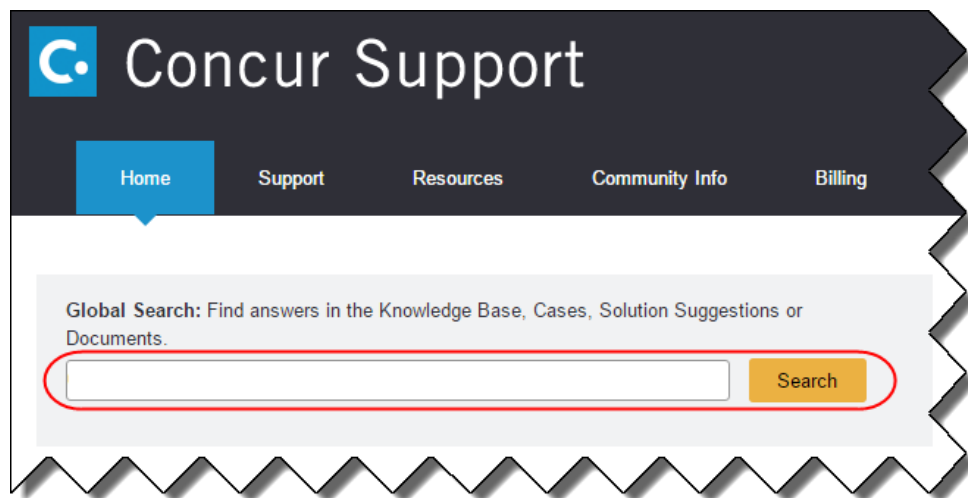
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

May Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11035982	Smart Expenses The transaction amount and exchange rate of the report entry from the credit card did not match the credit card feed. <i>The code has been corrected to prevent future instances of this issue.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: May 12, 2018 Update #3: Friday, May 18, 6:45 AM PT	Client FINAL

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Release Notes

Admin

New Cookie Preferences Link in the SAP Concur Footer

Overview

During the May 12 release, some cookie-related process changes and links were introduced because of specific consent requirements in Europe.

There are two types of consent when allowing cookies to be saved on the user's computer. As described on the following pages, each country decides which option to use. The options are:

- **Active consent:** The user actively agrees to accept cookies. In this case, SAP Concur is required to obtain user consent before loading any cookies on a user's computer.
- **Passive consent:** The user does not prevent cookies.

IMPORTANT

This release note discusses consent for and modification of cookies. Note the following:

- TrustArc, a global privacy and data governance provider, monitors and manages the cookie-related processes for SAP Concur.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. ***There is no option for companies to make these choices for their users.***
- Once a user has accepted cookies, they cannot modify their cookies options to stop accepting cookies.
- Concur is taking a phased approach to some of these changes. For example, not all clients will immediately see the **Cookie Preferences** link (described below). In addition, over the next two weeks, some of the options may have subtle changes. Regardless, all changes will be available and in effect by May 25.

BUSINESS PURPOSE/CLIENT BENEFIT

These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

What the user sees depends on the country in which the user is located. Each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

! IMPORTANT: Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.

As the user is signing in to SAP Concur, TrustArc identifies the country associated with the user and determines if user consent is active or passive.

ACTIVE CONSENT REQUIRED

If active consent is required – before the user can access any SAP Concur page – the user sees the **About cookies on this site** window.

About cookies on this site SAP Concur 

Cookies are important to the proper functioning of a site. To improve your experience, we use cookies to remember log-in details and provide secure log-in, collect statistics to optimize site functionality, and deliver content tailored to your interests. Click Agree and Proceed to accept cookies and go directly to the site or click on View Cookie Settings to see detailed descriptions of the types of cookies and choose whether to accept certain cookies while on the site.

[Agree and Proceed](#) [View Cookie Settings »](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by:  TrustArc | TRUSTe

The user can:

- Read the agreement text and then click **Agree and Proceed**; the user is then directed into SAP Concur.
- **or** –
- Click **View Cookie Settings** to see other options.

NOTE: The user cannot bypass this page. If the user chooses to **not** accept cookies, the user cannot access SAP Concur.

If the user clicks **View Cookie Settings**, this page appears.

About cookies on this site



Please choose whether this site may use Functional and/or Advertising cookies, as described below:

—

REQUIRED COOKIES

These cookies are required to enable core site functionality.

—

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

—

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

[Privacy Policy](#) | Powered by:  TRUSTe

On this page, the user can slide the bar on the left to accept:

- **Required cookies:** Those required to use SAP Concur services.
- **Required and functional cookies:** Required cookies *plus* those used for performance and usage analysis.
- **Required, functional, and advertising cookies:** Required cookies *plus* functional cookies *plus* cookies used for advertisements.

The user can:

- Click **Cancel** and return to the previous page.
– **or** –
- Slide the bar to make their choice and then click **Submit Preferences**.
– **or** –
- Click **Advanced Settings**.

If the user clicks **Advanced Settings**, they will have a read-only view of the existing cookies.

Once the user consents, the requirement is satisfied and the window does not appear again.

PASSIVE CONSENT

In some countries, once the user has accessed SAP Concur, a banner similar to the one below appears at the top of the SAP Concur page.

By using the SAP site, you agree with our use of cookies.

[I consent to cookies](#) [Want to know more?](#)

Whether or not the user actively consents, consent is implied. The user can continue to work in SAP Concur and the banner does not interfere with the user's tasks; however, the banner remains until the user clicks **I consent to cookies**.

The user clicks **Want to know more?**, the user sees the cookie options (as described previously).

About cookies on this site

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

—

REQUIRED COOKIES

These cookies are required to enable core site functionality.

—

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

—

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

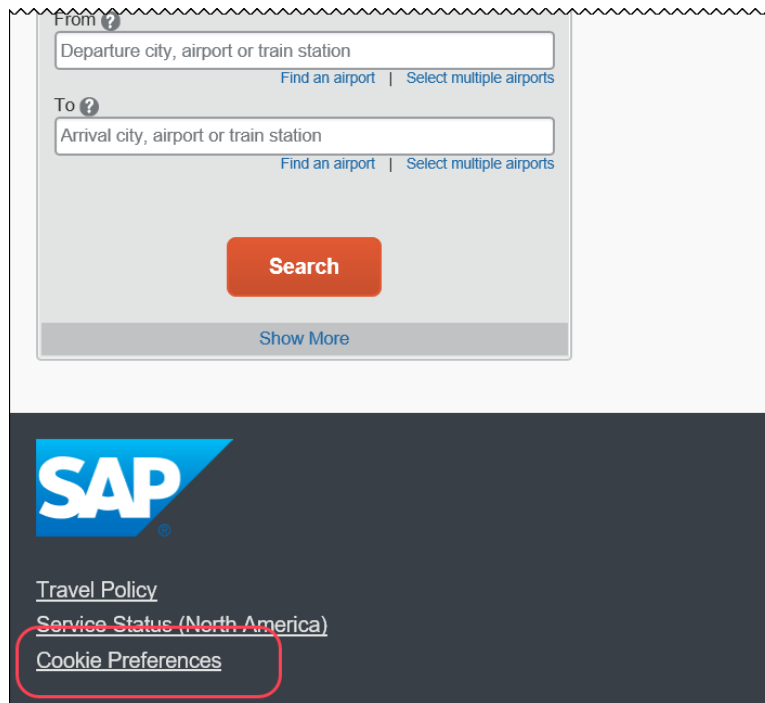
Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by: [TrustArc](#) | TRUSTe

Once the user consents, the requirement is satisfied and the banner does not appear again.

MAKING CHANGES

Certain users will see the **Cookie Preferences** link in the footer.



The screenshot shows the SAP Concur footer. At the top, there is a search form with 'From' and 'To' sections, each containing a text input field for 'Departure city, airport or train station' and 'Arrival city, airport or train station' respectively. Below these are links for 'Find an airport' and 'Select multiple airports'. A red 'Search' button is centered below the inputs, and a 'Show More' link is at the bottom of the search area. Below the search form is the SAP logo. Under the logo, there are links for 'Travel Policy', 'Service Status (North America)', and 'Cookie Preferences'. The 'Cookie Preferences' link is highlighted with a red circle.

This link allows users to view their existing cookie settings and make adjustments, if desired. Over time, all users will see this link and be able to modify their cookie settings.

Configuration/Feature Activation

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

Whitelist for TrustArc.com

Overview

As noted in the *New Cookie Preferences Link in the SAP Concur Footer* release note, cookie-related process changes were introduced because of specific consent regulations in Europe.

To ensure that SAP Concur properly responds to the regulations, SAP Concur has enlisted the assistance of TrustArc, a global privacy and data governance provider. Please ensure that your organization's IT (or similar) department adds TrustArc.com to its whitelist, so TrustArc can properly monitor and manage these processes.

BUSINESS PURPOSE/CLIENT BENEFIT

Whitelisting ensures that TrustArc has the proper access to manage consent requirements on behalf of SAP Concur.

Configuration/Feature Activation

There are no configuration steps except to ensure that TrustArc.com is whitelisted for your organization.

Privacy Agreement Page Removed; New SAP Concur Privacy Statement

Overview

For customers who currently display the **Privacy Agreement** page to users, be aware that – with this release – SAP Concur will eliminate that page. That means, the existing **Privacy Agreement** page will no longer display, under any circumstances. With that, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

Also with this release, SAP Concur will provide a standard privacy statement, which can be accessed via a link in the page footer. The new SAP Concur Privacy Statement describes SAP Concur's responsibility as a "processor" of customer data.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur Privacy Statement.

What the User Sees

With this release, a user can access the new SAP Concur Privacy Statement by clicking the **Processor Privacy Statement** link in the lower-left corner of any page in the web version of Concur. A user can also access it by clicking the **Privacy Policy** link in Settings in the SAP Concur mobile app.

"PROCESSOR" OF CUSTOMER DATA

The new privacy statement is required because SAP Concur is a "processor" of customer data.

! IMPORTANT: Be aware that the term "processor" here is **not** at all related to the Processor roles found in most SAP Concur products.

PRIVACY STATEMENT TEXT

The new SAP Concur Privacy Statement text is available here:

<https://www.concur.com/en-us/processor-privacy-statement>

FAQs

Q. Why can't I continue using the existing **Privacy Agreement** page?

A. SAP Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within SAP Concur services.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Some customers have used the **Privacy Agreement** page to convey company-specific information to its users. That option is no longer available. Customers must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. Will I be able to require that users read and accept the privacy statement before being able to access the SAP Concur service?

A. The SAP Concur Privacy Statement will not be configurable by customers in any way. Its function is to describe SAP Concur's processing activities of customer data.

Configuration / Feature Activation

This change will occur automatically; there are no additional configuration or activation steps. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

****UPDATE** Processor Privacy Statement Link – Available This Week**

Overview

For the past few months, the release notes stated that – for the May 12 release – the existing **Privacy Agreement** page would be retired and the new **Processor Privacy Statement** link would become available in the lower-left corner of the SAP Concur footer.

In fact, the **Privacy Agreement** page has been removed but the **Processor Privacy Statement** link is not yet available. Additional changes are being made so the **Processor Privacy Statement** link will appear in the footer this week.

NOTE: In the *New Cookie Preferences Link in the SAP Concur Footer* release note below, note that there is a **Privacy Policy** link at the bottom of the **About cookies on this site** window. Users can view the new privacy statement there, if desired, until the **Processor Privacy Statement** link becomes available later this week.

Configuration/Feature Activation

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

SAP Concur Updating to sap.com Email Addresses

Overview

SAP Concur is updating our employee's outgoing email to use sap.com instead of concur.com email addresses. This means clients will receive email communications from both domains. Clients may want to contact their IT department to add "sap.com" to their email whitelist.

Communications sent to SAP Concur using the concur.com email addresses will continue to be supported, including:

- plans@concur.com
- receipts@concur.com

and all other existing concur.com email addresses.

BACKGROUND

In January of this year, we shared with you our evolution to the SAP Concur logo and brand. As part of our evolution to the SAP Concur brand, and as we continue to leverage the assets available to us as members of the SAP family, you can expect to see email communication from Concur that may come from the @sap.com email domain, in addition to @concur.com. Rest assured, communication from either address will be from the same person, and you can engage with us via either address.

BUSINESS PURPOSE / CLIENT BENEFIT

SAP Concur is moving to the SAP brand, which includes updating email communications to use email addresses on the sap.com domain.

Configuration / Feature Activation

SAP Concur made this change automatically on April 14, 2018. Clients do not need to make any changes to their existing processes.

Budget

Budget Release Notes

Overview

Clients can view new budget functionality and enhancements in the new Budget Release Notes which are located on the same page as the other product release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Company Card

Addition of Income and Transfer Transaction Categories to Yodlee

Overview

With this release, users of Yodlee are now able to work with transaction data from the **Income** and **Transfer** categories. Prior to this change, transactions falling into either of these categories were set as undefined and hidden by the system. With this change, these transactions are now correctly categorized for the client.

Please note that this feature enhancement will still filter out transactions categorized as payment or account settlement because they are not expense-report related. As the integration is based on an individual registration, the end user would delete what is not eligible to expense report reimbursement.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement extends the scope of what flows into Concur, allowing clients to process their card transactions by bringing support for the missing **Income** and **Transfer** categories to the Expense product.

Configuration/Feature Activation

This new mapping is not configurable and is now automatically available to all clients; there are no activation steps.

Change to AMEX GL 1022 “No Vendor Supplied” Card Feed Data Handling

Overview

With this release, clients moving to the GL-1022 American Express card feed will note enhanced handling of the “American Express Initiated Activity” data to match that of the GL-1025 feed. With this upcoming change, data will yield values for **Merchant Name** and/or **Vendor Name** instead of returning a “No Vendor Supplied” message.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement updates the GL-1022 data reconciliation to match the behavior of the GL-1025 card feed.

Preparing for This Change

Clients whose audit rule definitions will trigger based on the existing *Vendor Name = No Vendor Supplied* feed return value should review and, if necessary, update these configurations to match the new behavior of the GL-1022 card feed.

Configuration/Feature Activation

Concur has automatically implemented this change.

Data Retention

New Early Access Feature for Outdated Data

Overview

SAP Concur has a new feature, Data Retention, that allows clients to control how long the Concur solution stores their data based on who, when, and where criteria. A new shared role, **Data Retention Administrator**, has been created in the system and is required for accessing this feature.

The feature provides the following functionality:

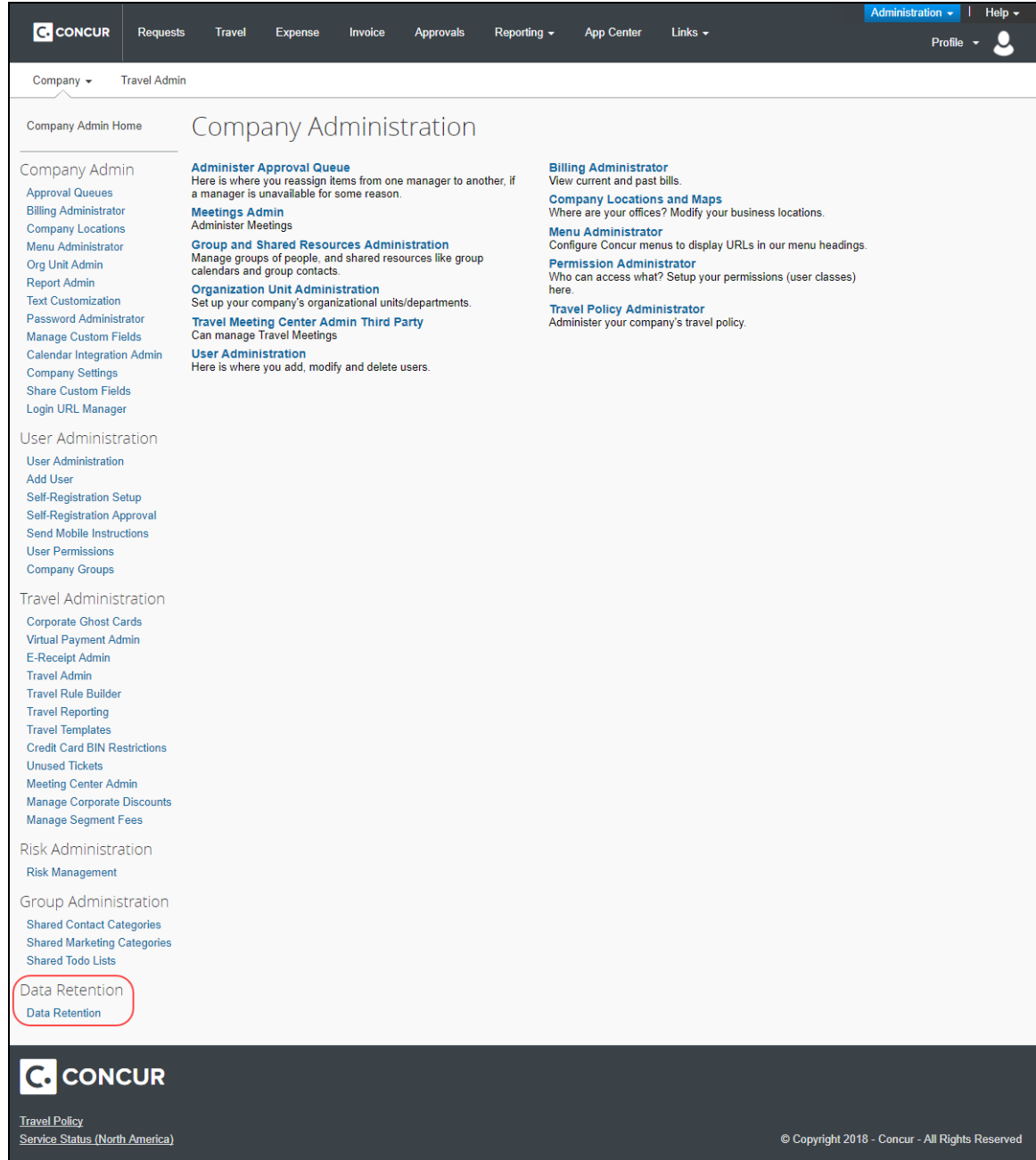
- Allows a company to set a specific amount of calendar time after which data such as old user profiles, itineraries, and expense reports will be removed.
- Provides for strict access to policy configuration with an email notification.
- Includes the ability to place a hold on a specific user whose data will be excluded by this feature when it is necessary or desirable to retain older data.
- Includes the ability to remove the data of a specific user independent of the company-wide data retention configuration.
- Provides a high-level summary of events to monitor data retention activities.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

If enabled by SAP Concur, at the bottom of the **Company Administration** page, the client admin will see a **Data Retention** link.





For more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this early access feature becomes available as part of the May release, you may request that it be enabled for your company by contacting Concur Customer Support.

New 23-Month Filter

Overview

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View transactions
- Unassigned Cash Advances

! IMPORTANT: Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Using **View Transactions**, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | New Feature for Outdated Data* release note included in this month's Release Notes.

Expense Pay – Global

(Canada) Additional Card Programs Now Supported for CAD

Overview

Expense Pay – Global for Expense now supports the following credit card programs for the Canadian Dollar (CAD \$):

- Citibank MasterCard CAD
- Citibank Visa CAD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

The screenshot shows the 'Add New Card Program' form. The 'Program Type' dropdown menu is highlighted with a red circle. The form contains the following fields and options:

- Program Name:** A text input field.
- Payment Type:** A dropdown menu.
- Program Type:** A dropdown menu, highlighted with a red circle.
- Currency:** A text input field.
- Active:** A dropdown menu with 'Yes' selected.
- Classic:** An unchecked checkbox.
- Global:** An unchecked checkbox.
- Verify IIN:** A blue link.
- Save:** A blue button.
- Cancel:** A blue button.

Configuration/Feature Activation

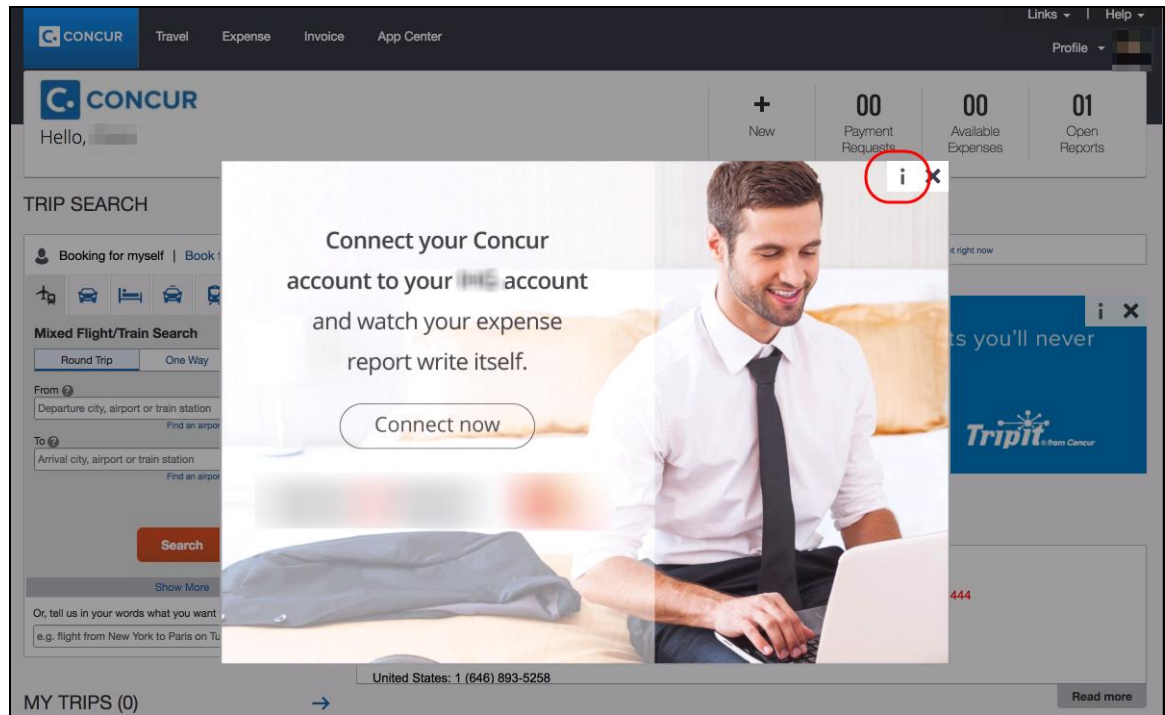
Concur automatically implemented these changes; there are no configuration or activation steps.

In-Product Messaging (IPM)

Clarification: Opt Out of In-Product Messaging

Overview

For the past few months, there have been release notes about users being able to opt out of in-product messaging (IPM).



Just to clarify:

- **For customers deployed to the EMEA Data Center**, users were provided the ability to opt out late last year.
- **For customers deployed to the North America Data Center**, users will be provided the ability to opt out in stages, with SAP Concur planning to have this feature fully available by the end of April.

! IMPORTANT: There are certain messages of critical importance that a user cannot opt out of receiving, for example, messages asking the user to accept updated terms.

Configuration/Feature Activation

The ability to opt out occurs automatically; there are no additional configuration or activation steps.

Japan Public Transport (JPT)

IC Card Numbers Removed from Receipt Images

Overview

When Concur renders receipt images for Japan Public Transport (JPT), they will no longer include IC Card numbers.

NOTE: SAP Concur will not modify or replace existing receipt images that were rendered prior to this change.

BUSINESS PURPOSE/CLIENT BENEFIT

This change increases personal privacy for Concur users.

Configuration/Feature Activation

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

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

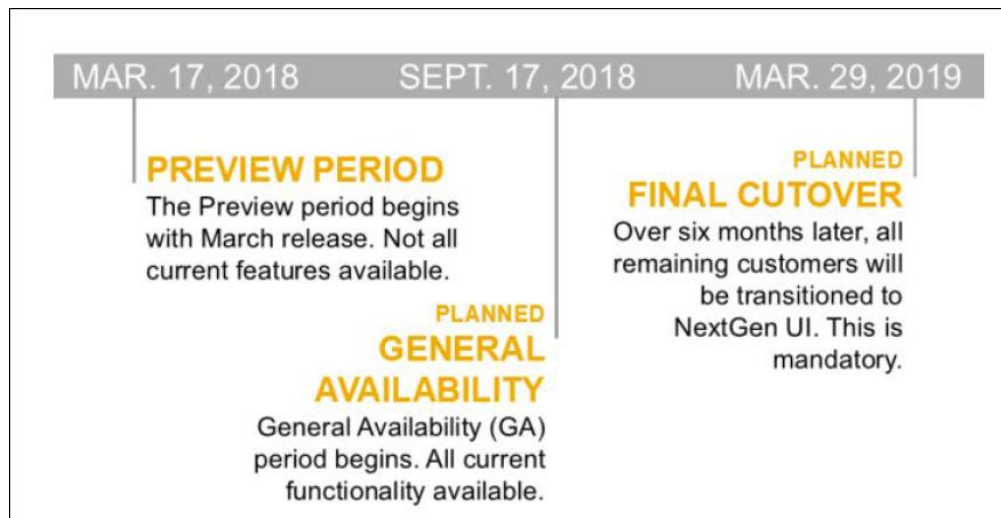
****Ongoing** New User Interface for Concur Expense End Users**

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.



BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

SAP Concur's Platform

Callout Server Requirements Update

Overview

The SAP Concur servers that support the SAP Concur Platform Callouts are scheduled for an upgrade. This maintenance includes the Production Proxy Migration (North America Data Center only) and PWS Server Migration to VM (EMEA And North American Data Centers only). The PWS Server Migration to VM was completed on May 2, 2018. The Production Proxy Migration began on May 9, 2018 with one third of the traffic routed through the Production proxy. The other two thirds of the traffic is estimated to migrate through the Production proxy the week of May 14, 2018.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.
- Clients who whitelist access for Concur callout traffic from the North America Data Center (not common) may need to update their access control list (ACL) to IP 12.129.29.86.

! IMPORTANT: If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur will automatically implement these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expenses Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration/Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

! IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

! IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

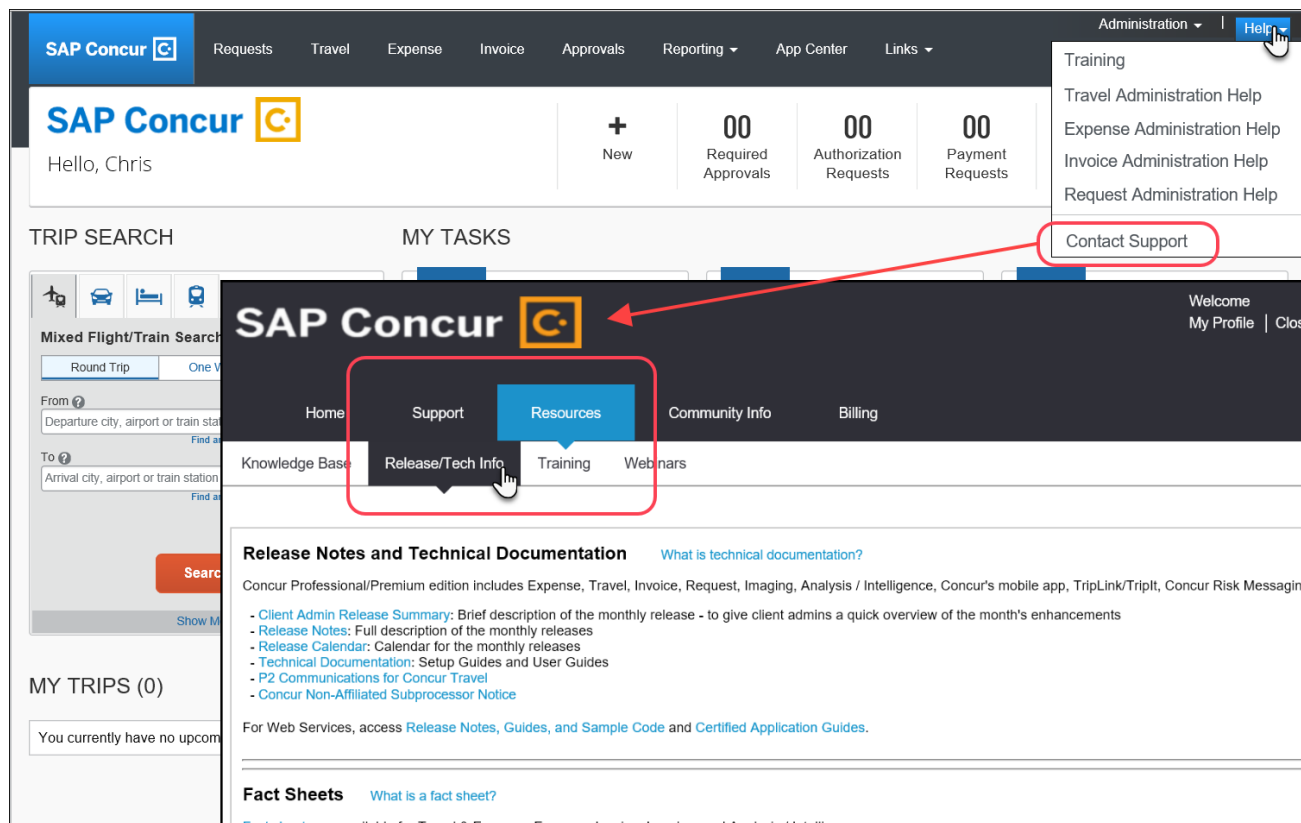
Expense Setup Guides

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



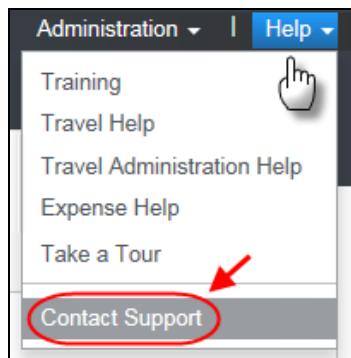
Cases

Steps for Getting a Status

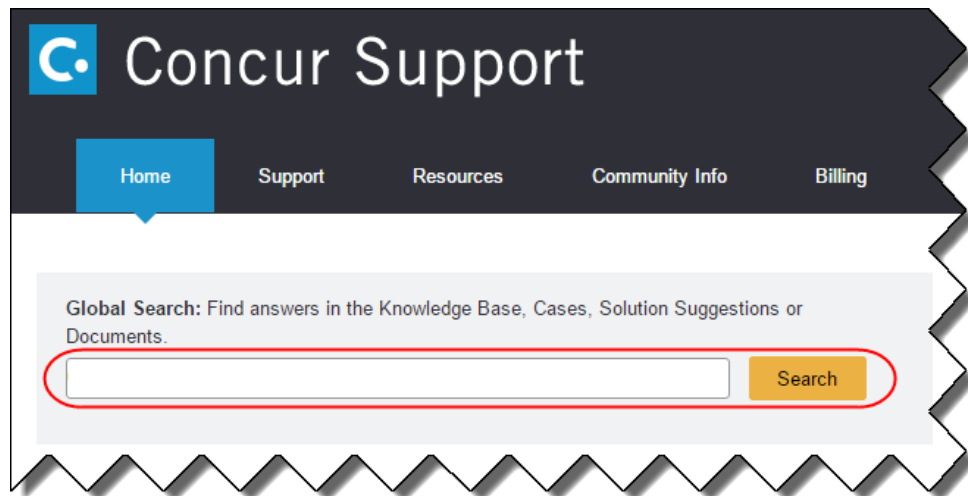
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

May Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11035982	Smart Expenses The transaction amount and exchange rate of the report entry from the credit card did not match the credit card feed. <i>The code has been corrected to prevent future instances of this issue.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: May 12, 2018 Update #4: Thursday, May 24, 2:00 PM PT	Client FINAL

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Release Notes

Admin

New Cookie Preferences Link in the SAP Concur Footer

Overview

During the May 12 release, some cookie-related process changes and links were introduced because of specific consent requirements in Europe.

There are two types of consent when allowing cookies to be saved on the user's computer. As described on the following pages, each country decides which option to use. The options are:

- **Active consent:** The user actively agrees to accept cookies. In this case, SAP Concur is required to obtain user consent before loading any cookies on a user's computer.
- **Passive consent:** The user does not prevent cookies.

IMPORTANT

This release note discusses consent for and modification of cookies. Note the following:

- TrustArc, a global privacy and data governance provider, monitors and manages the cookie-related processes for SAP Concur.

Several consent options are described on the following pages.

- ♦ Be aware the TrustArc provides all consent text and manages all translations of the consent text. Neither SAP Concur nor its customers can affect the text or translation in any way.
- ♦ As described on the following pages, consent regulations differ by country. TrustArc determines the consent option that is appropriate for each user, based on each country's regulations. SAP Concur cannot affect that determination in any way nor does SAP Concur have a list of countries and their consent regulations.
- ♦ Be aware that the "country" is defined as the one in which the user is physically located when they sign in to SAP Concur – **not** the user's home country as defined in their profile nor the user's company's location.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. **There is no option for companies to make these choices for their users.**
- Once a user has actively accepted cookies, they cannot modify their cookies options to stop accepting cookies except to remove all cookies and start over.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

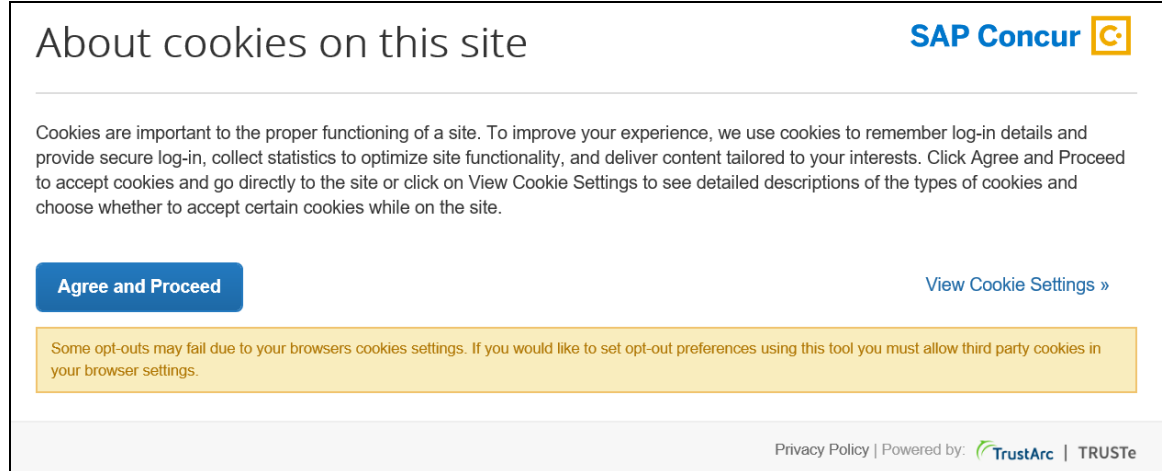
What the user sees depends on the country in which the user is physically located when they sign in to SAP Concur. Each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

⚠ IMPORTANT: Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.

As the user is signing in to SAP Concur, TrustArc identifies the country associated with the user and determines if user consent is active or passive.

ACTIVE CONSENT REQUIRED

If active consent is required – before the user can access any SAP Concur page – the user sees the **About cookies on this site** window.



The user can:

- Read the agreement text and then click **Agree and Proceed**; the user is then directed into SAP Concur.
– **or** –
- Click **View Cookie Settings** to see other options.

NOTE: The user cannot bypass this page. If the user chooses to **not** accept cookies, the user cannot access SAP Concur.

If the user clicks **View Cookie Settings**, this page appears.

About cookies on this site SAP Concur

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

— REQUIRED COOKIES

These cookies are required to enable core site functionality.

— FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

— **ADVERTISING COOKIES**

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

Cancel **Submit Preferences** **Advanced Settings**

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by: TrustArc | TRUSTe

On this page, the user can slide the bar on the left to accept:

- **Required cookies:** Those required to use SAP Concur services.
- **Required and functional cookies:** Required cookies *plus* those used for performance and usage analysis.
- **Required, functional, and advertising cookies:** Required cookies *plus* functional cookies *plus* cookies used for advertisements.

The user can:

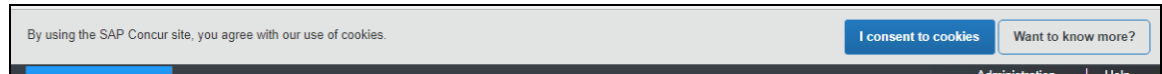
- Click **Cancel** and return to the previous page.
— **or** —
- Slide the bar to make their choice and then click **Submit Preferences**.
— **or** —
- Click **Advanced Settings**.

If the user clicks **Advanced Settings**, they will have a read-only view of the existing cookies.

Once the user consents, the requirement is satisfied and the consent message does not appear again.

PASSIVE CONSENT

In some countries, once the user has accessed SAP Concur, a banner similar to the one below appears at the top of the SAP Concur page.



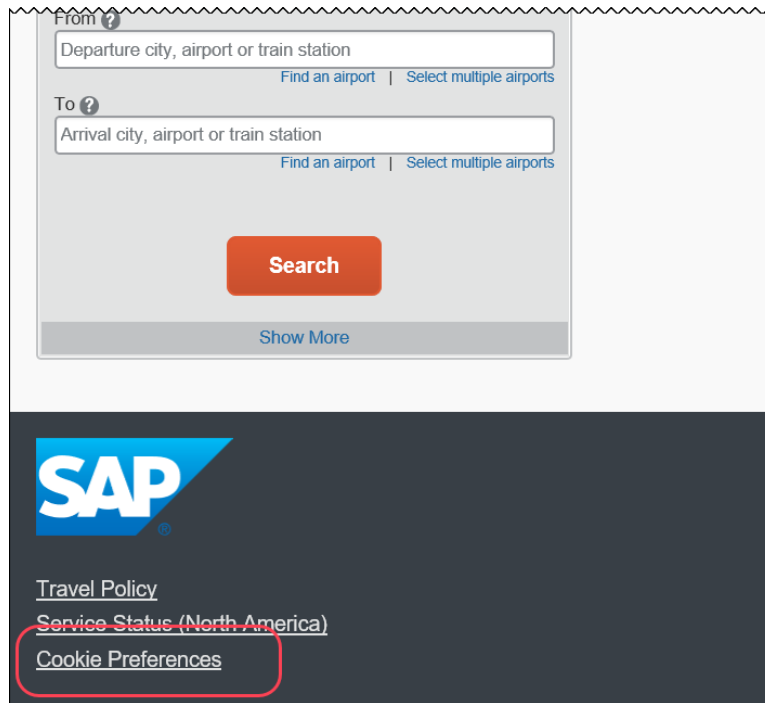
Whether or not the user actively consents, consent is implied. The user can continue to work in SAP Concur and the banner does not interfere with the user's tasks; however, the banner remains until the user clicks **I consent to cookies**.

The user clicks **Want to know more?**, the user sees the cookie options (as described previously).

Once the user consents, the requirement is satisfied and the banner does not appear again.

MAKING CHANGES

The **Cookie Preferences** link appears in the SAP Concur footer.



This link allows users to view their existing cookie settings. To modify existing cookie preferences, TrustArc requires that the user clear all existing cookies and then choose a new setting.

⚠ IMPORTANT: Not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Cookie Preferences** link there.

Configuration / Feature Activation

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

Whitelist for TrustArc.com

Overview

As noted in the *New Cookie Preferences Link in the SAP Concur Footer* release note, cookie-related process changes were introduced because of specific consent regulations in Europe.

To ensure that SAP Concur properly responds to the regulations, SAP Concur has enlisted the assistance of TrustArc, a global privacy and data governance provider. Please ensure that your organization's IT (or similar) department adds TrustArc.com to its whitelist, so TrustArc can properly monitor and manage these processes.

BUSINESS PURPOSE/CLIENT BENEFIT

Whitelisting ensures that TrustArc has the proper access to manage consent requirements on behalf of SAP Concur.

Configuration/Feature Activation

There are no configuration steps except to ensure that TrustArc.com is whitelisted for your organization.

Privacy Agreement Page Removed; New SAP Concur Privacy Statement

Overview

For customers who currently display the **Privacy Agreement** page to users, be aware that – with this release – SAP Concur will eliminate that page. That means, the existing **Privacy Agreement** page will no longer display, under any circumstances. With that, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

Also with this release, SAP Concur will provide a standard privacy statement, which can be accessed via a link in the page footer. The new SAP Concur Privacy Statement describes SAP Concur's responsibility as a "processor" of customer data.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent of the change is to ensure that all customers see the same unmodified SAP Concur Privacy Statement.

What the User Sees

With this release, a user can access the new SAP Concur Privacy Statement by clicking the **Processor Privacy Statement** link in the lower-left corner of any page in the web version of Concur. A user can also access it by clicking the **Privacy Policy** link in Settings in the SAP Concur mobile app.

"PROCESSOR" OF CUSTOMER DATA

The new privacy statement is required because SAP Concur is a "processor" of customer data.

 **IMPORTANT:** Be aware that the term "processor" here is **not** at all related to the Processor roles found in most SAP Concur products.

PRIVACY STATEMENT TEXT

The new SAP Concur Privacy Statement text is available here:

<https://www.concur.com/en-us/processor-privacy-statement>

FAQs

Q. Why can't I continue using the existing **Privacy Agreement** page?

A. SAP Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within SAP Concur services.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Some customers have used the **Privacy Agreement** page to convey company-specific information to its users. That option is no longer available. Customers must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. Will I be able to require that users read and accept the privacy statement before being able to access the SAP Concur service?

A. The SAP Concur Privacy Statement will not be configurable by customers in any way. Its function is to describe SAP Concur's processing activities of customer data.

Configuration / Feature Activation

This change will occur automatically; there are no additional configuration or activation steps. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

****UPDATE** Processor Privacy Statement Link – Targeted for May 25**

Overview

For the past few months, the release notes stated that – for the May 12 release – the existing **Privacy Agreement** page would be retired and the new **Processor Privacy Statement** link would become available in the lower-left corner of the SAP Concur footer.

Targeted for May 25, the **Processor Privacy Statement** link will be available in the SAP Concur footer.

 **IMPORTANT:** Not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Processor Privacy Statement** link there.

Configuration / Feature Activation

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

SAP Concur Updating to sap.com Email Addresses

Overview

SAP Concur is updating our employee's outgoing email to use sap.com instead of concur.com email addresses. This means clients will receive email communications from both domains. Clients may want to contact their IT department to add "sap.com" to their email whitelist.

Communications sent to SAP Concur using the concur.com email addresses will continue to be supported, including:

- plans@concur.com
- receipts@concur.com

and all other existing concur.com email addresses.

BACKGROUND

In January of this year, we shared with you our evolution to the SAP Concur logo and brand. As part of our evolution to the SAP Concur brand, and as we continue to leverage the assets available to us as members of the SAP family, you can expect to see email communication from Concur that may come from the @sap.com email domain, in addition to @concur.com. Rest assured, communication from either address will be from the same person, and you can engage with us via either address.

BUSINESS PURPOSE / CLIENT BENEFIT

SAP Concur is moving to the SAP brand, which includes updating email communications to use email addresses on the sap.com domain.

Configuration / Feature Activation

SAP Concur made this change automatically on April 14, 2018. Clients do not need to make any changes to their existing processes.

Budget

Budget Release Notes

Overview

Clients can view new budget functionality and enhancements in the new Budget Release Notes which are located on the same page as the other product release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Company Card

Addition of Income and Transfer Transaction Categories to Yodlee

Overview

With this release, users of Yodlee are now able to work with transaction data from the **Income** and **Transfer** categories. Prior to this change, transactions falling into either of these categories were set as undefined and hidden by the system. With this change, these transactions are now correctly categorized for the client.

Please note that this feature enhancement will still filter out transactions categorized as payment or account settlement because they are not expense-report related. As the integration is based on an individual registration, the end user would delete what is not eligible to expense report reimbursement.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement extends the scope of what flows into Concur, allowing clients to process their card transactions by bringing support for the missing **Income** and **Transfer** categories to the Expense product.

Configuration/Feature Activation

This new mapping is not configurable and is now automatically available to all clients; there are no activation steps.

Change to AMEX GL 1022 “No Vendor Supplied” Card Feed Data Handling

Overview

With this release, clients moving to the GL-1022 American Express card feed will note enhanced handling of the “American Express Initiated Activity” data to match that of the GL-1025 feed. With this upcoming change, data will yield values for **Merchant Name** and/or **Vendor Name** instead of returning a “No Vendor Supplied” message.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement updates the GL-1022 data reconciliation to match the behavior of the GL-1025 card feed.

Preparing for This Change

Clients whose audit rule definitions will trigger based on the existing *Vendor Name = No Vendor Supplied* feed return value should review and, if necessary, update these configurations to match the new behavior of the GL-1022 card feed.

Configuration/Feature Activation

Concur has automatically implemented this change.

Data Retention

New Early Access Feature for Outdated Data

Overview

SAP Concur has a new feature, Data Retention, that allows clients to control how long the Concur solution stores their data based on who, when, and where criteria. A new shared role, **Data Retention Administrator**, has been created in the system and is required for accessing this feature.

The feature provides the following functionality:

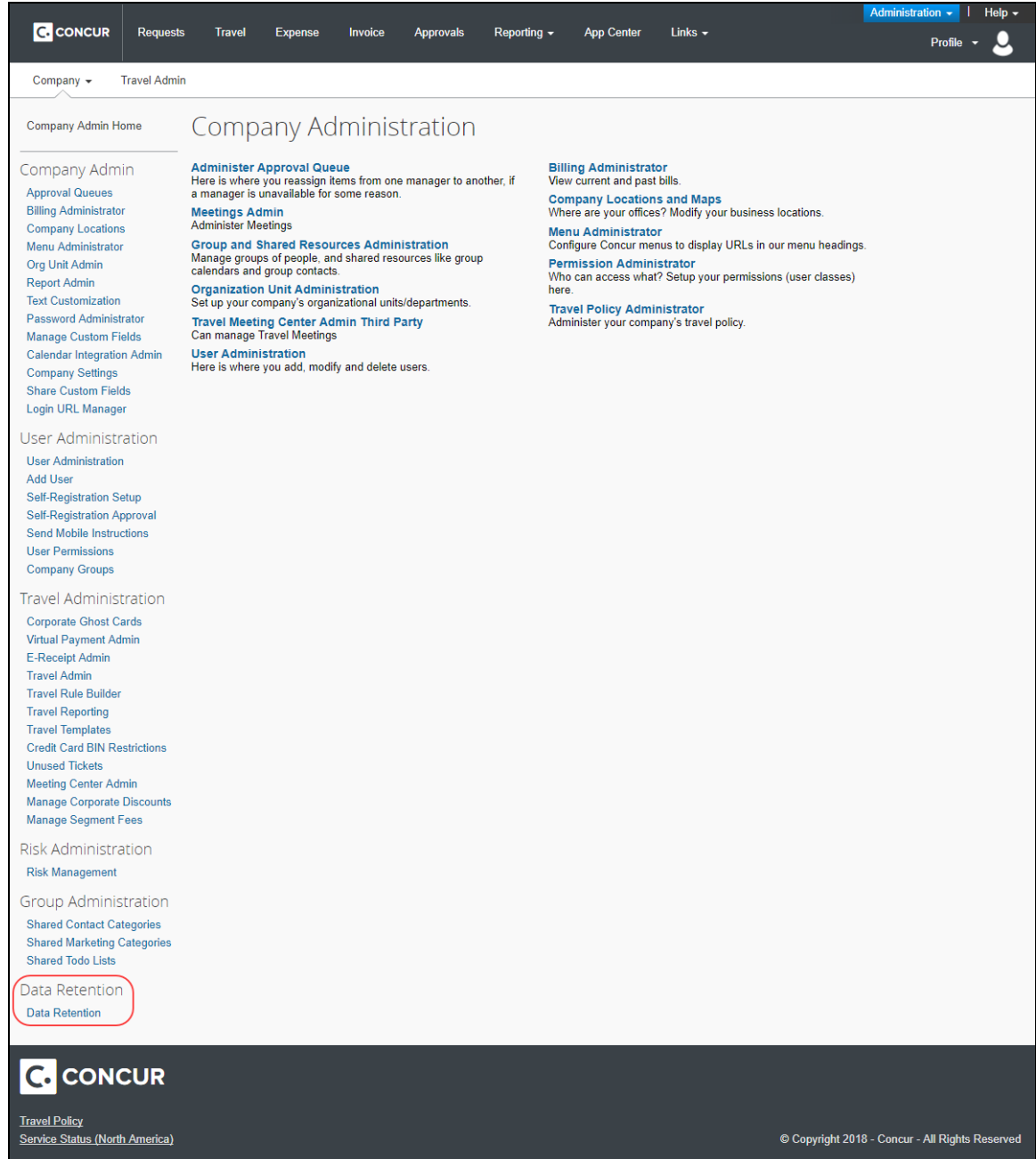
- Allows a company to set a specific amount of calendar time after which data such as old user profiles, itineraries, and expense reports will be removed.
- Provides for strict access to policy configuration with an email notification.
- Includes the ability to place a hold on a specific user whose data will be excluded by this feature when it is necessary or desirable to retain older data.
- Includes the ability to remove the data of a specific user independent of the company-wide data retention configuration.
- Provides a high-level summary of events to monitor data retention activities.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

If enabled by SAP Concur, at the bottom of the **Company Administration** page, the client admin will see a **Data Retention** link.





For more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this early access feature becomes available as part of the May release, you may request that it be enabled for your company by contacting Concur Customer Support.

New 23-Month Filter

Overview

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View transactions
- Unassigned Cash Advances

⚠ IMPORTANT: Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Using **View Transactions**, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | New Feature for Outdated Data* release note included in this month's Release Notes.

Expense Pay – Global

(Canada) Additional Card Programs Now Supported for CAD

Overview

Expense Pay – Global for Expense now supports the following credit card programs for the Canadian Dollar (CAD \$):

- Citibank MasterCard CAD
- Citibank Visa CAD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

Add New Card Program [X]

Program Name

Payment Type
 [v]

Program Type:
 [v] [Verify IIN](#)

Currency

Active
 Yes [v]

☐ Classic ☐ Global

Configuration/Feature Activation

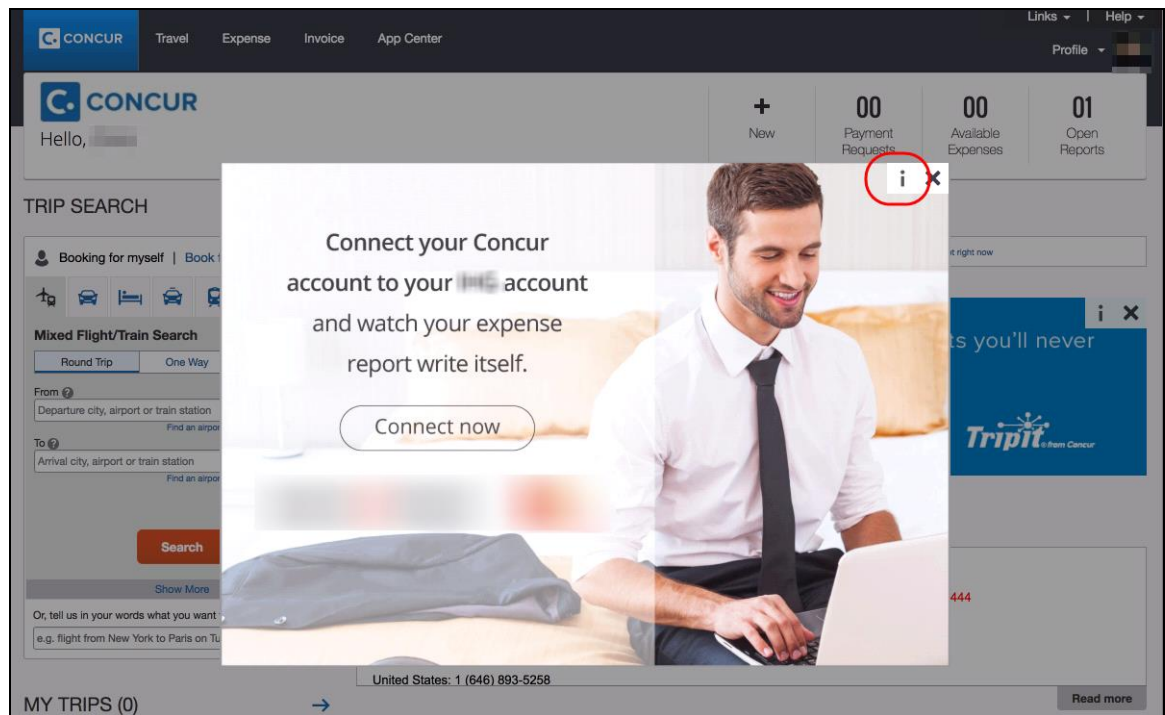
Concur automatically implemented these changes; there are no configuration or activation steps.

In-Product Messaging (IPM)

Clarification: Opt Out of In-Product Messaging

Overview

For the past few months, there have been release notes about users being able to opt out of in-product messaging (IPM).



Just to clarify:

- **For customers deployed to the EMEA Data Center**, users were provided the ability to opt out late last year.
- **For customers deployed to the North America Data Center**, users will be provided the ability to opt out in stages, with SAP Concur planning to have this feature fully available by the end of April.

⚠ IMPORTANT: There are certain messages of critical importance that a user cannot opt out of receiving, for example, messages asking the user to accept updated terms.

Configuration/Feature Activation

The ability to opt out occurs automatically; there are no additional configuration or activation steps.

Japan Public Transport (JPT)

IC Card Numbers Removed from Receipt Images

Overview

When Concur renders receipt images for Japan Public Transport (JPT), they will no longer include IC Card numbers.

NOTE: SAP Concur will not modify or replace existing receipt images that were rendered prior to this change.

BUSINESS PURPOSE/CLIENT BENEFIT

This change increases personal privacy for Concur users.

Configuration/Feature Activation

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

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

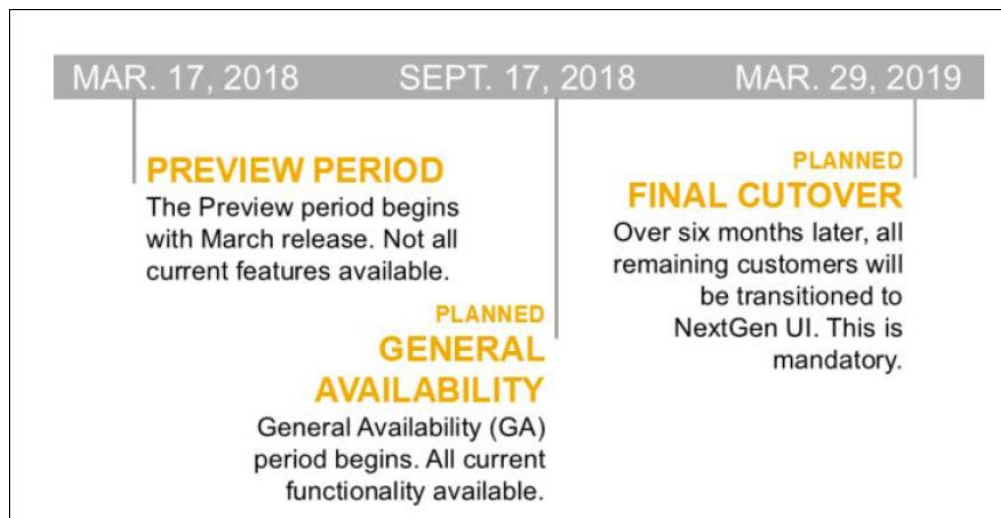
The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense****Ongoing** New User Interface for Concur Expense End Users****Overview**

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.



BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

SAP Concur's Platform

Callout Server Requirements Update

Overview

The SAP Concur servers that support the SAP Concur Platform Callouts are scheduled for an upgrade. This maintenance includes the Production Proxy Migration (North America Data Center only) and PWS Server Migration to VM (EMEA And North American Data Centers only). The PWS Server Migration to VM was completed on May 2, 2018. The Production Proxy Migration began on May 9, 2018 with one third of the traffic routed through the Production proxy. The other two thirds of the traffic is estimated to migrate through the Production proxy the week of May 14, 2018.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.
- Clients who whitelist access for Concur callout traffic from the North America Data Center (not common) may need to update their access control list (ACL) to IP 12.129.29.86.

⚠ IMPORTANT: If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur will automatically implement these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expenses Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

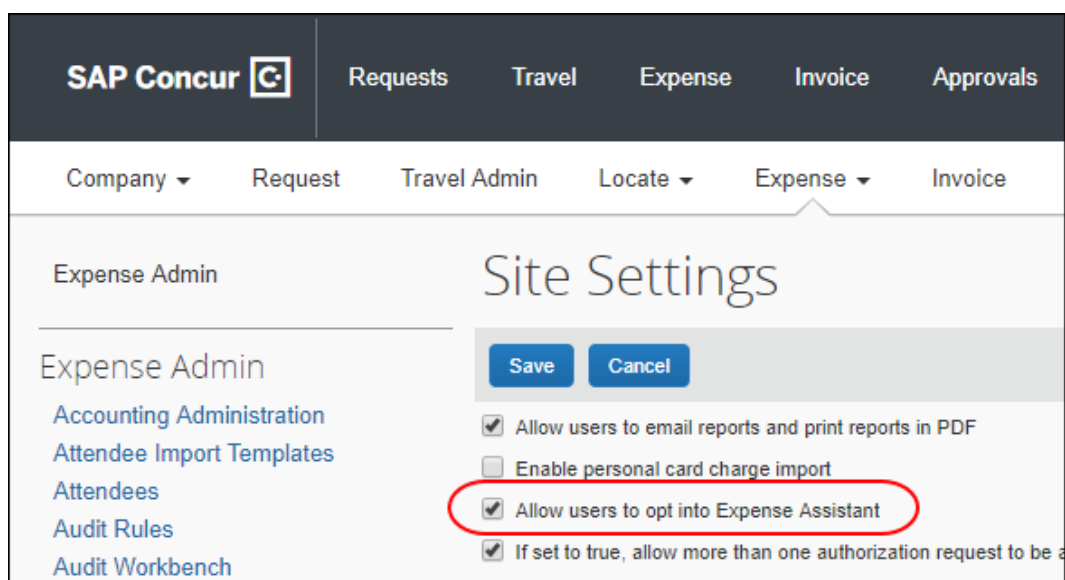
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration/Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

⚠ IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.



IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

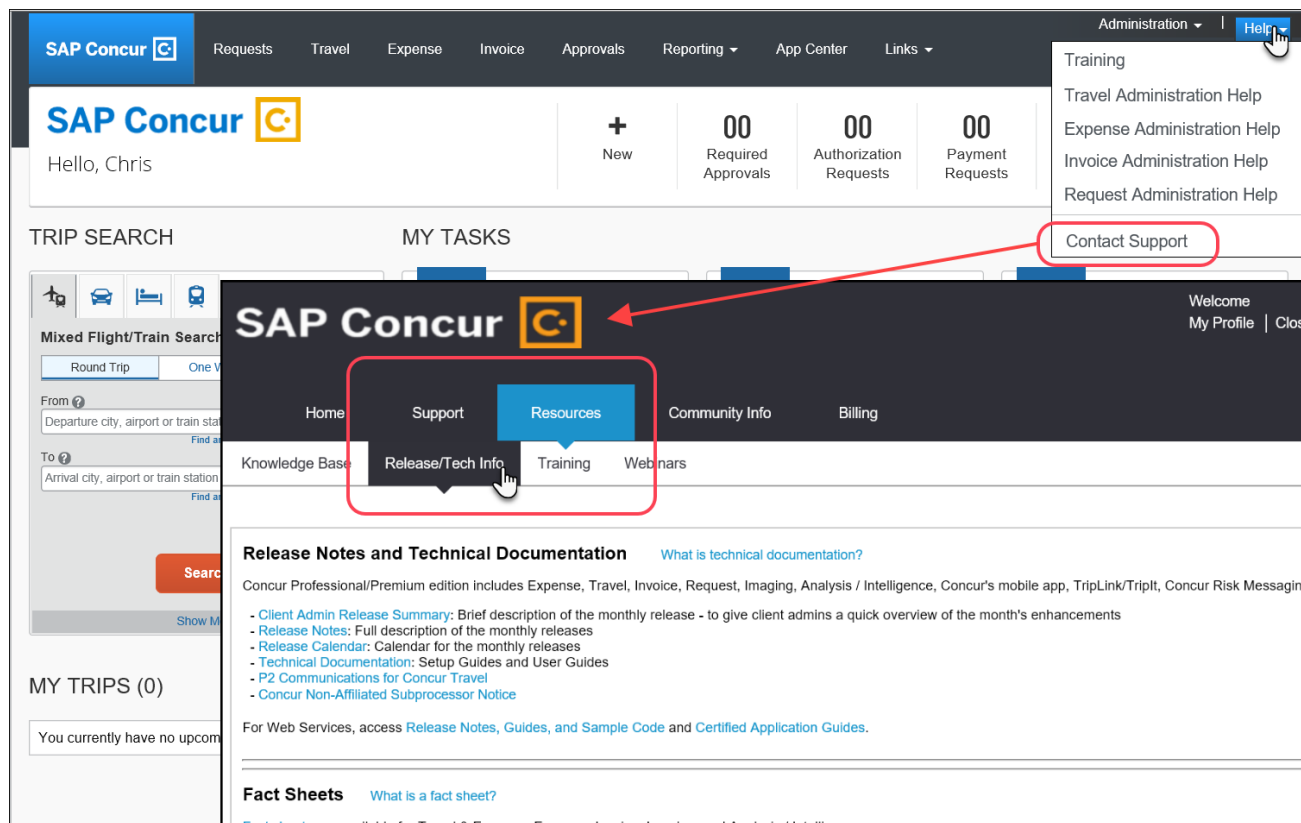
Expense Setup Guides

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



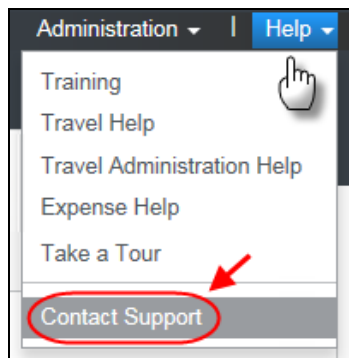
Cases

Steps for Getting a Status

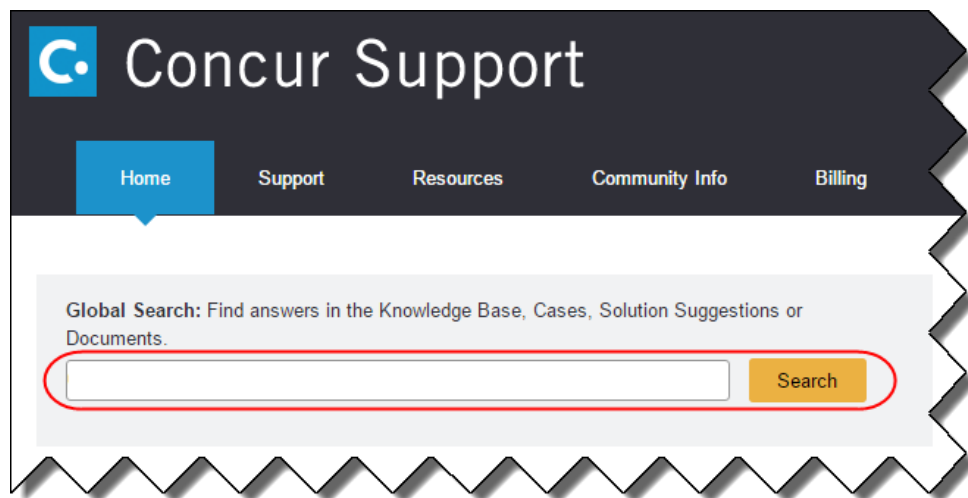
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

May Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11035982	Smart Expenses The transaction amount and exchange rate of the report entry from the credit card did not match the credit card feed. <i>The code has been corrected to prevent future instances of this issue.</i>

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Concur Release Notes	
Expense Professional / Premium	
Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: March 17, 2018 Update #2: Thursday, May 24, 3:45 PM PT	Client FINAL

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Release Notes

Accessibility

Alternative Text for the Logo on the Sign In Page

Overview

In June of 2017, accessibility tests for the June 2017 VPAT identified exceptions to the WCAG 2.0 global standards of the W3. These exceptions are identified issues where the location or action did not adhere to the A or AA standard of specific WCAG 2.0 rules. Resolving this issue improves our accessibility quality on the targeted location or action by aligning it to the appropriate WCAG standard.

Effectively, the issue and resolution is this: Screen readers are a type of assistive technology that audibly reads each screen element (instructional text, fields, options, etc.) to the user. Proper coding (in this case, known as *alternative text* or *alt text*) is required to ensure the reader “reads” the proper information to the user.

The issue is that the logo on the **Sign In** page does not currently have the proper code to read the logo description to the user. In this release, this issue will be resolved.



BUSINESS PURPOSE/CLIENT BENEFIT

Enhancing our products and services to better align to the accessible standards of WCAG 2.0 increases the ability of all Concur users.

What the User Sees

There is no visual change for the user.

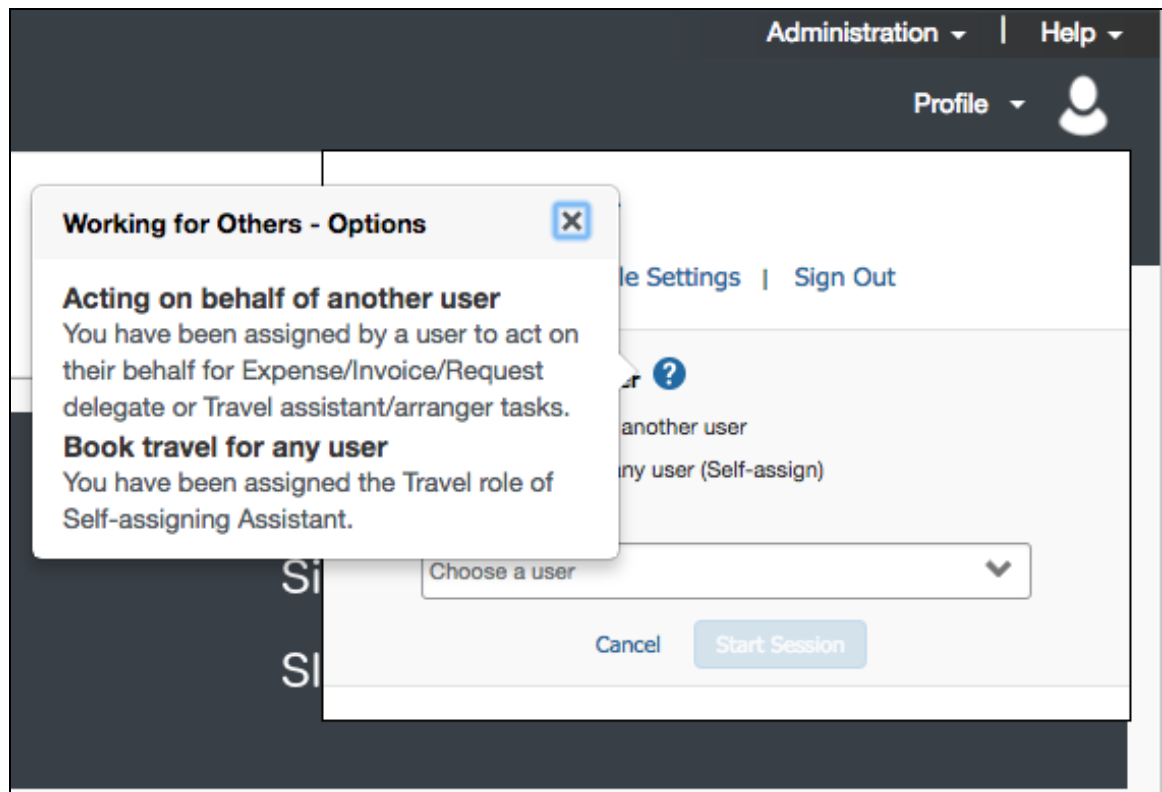
Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

Keyboard Access for Working for Others Quick Help

Overview

The **Working for Others** Quick Help contains important information and should be available to everyone. Currently, it is available only by clicking the "?" icon with a mouse. With this release, the **Working for Others** Quick Help will become accessible via the keyboard.



BUSINESS PURPOSE/CLIENT BENEFIT

Working for Others Quick Help will be available to mouse users and keyboard users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

Concur will automatically implement this change; there are no configuration or activation steps.

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

All companies must take all reasonable steps to protect the personal and sensitive information of their employees. As per recommended security-related best practices, remember that custom fields should not contain personal and sensitive data.

 **IMPORTANT: Data in custom fields is not encrypted.** The client is solely responsible for any liability resulting or arising from improper use.

If your company is currently using custom fields to store personal or sensitive data (for example, Social Security numbers, family member names, or any other personally identifying information), you should plan to remove this information from your existing fields within the service and modify your current configuration.

Next Steps

For information about your configuration and the use of custom fields, contact Concur Client Support or your Account Manager.

Users by Browser Report Updated

Overview

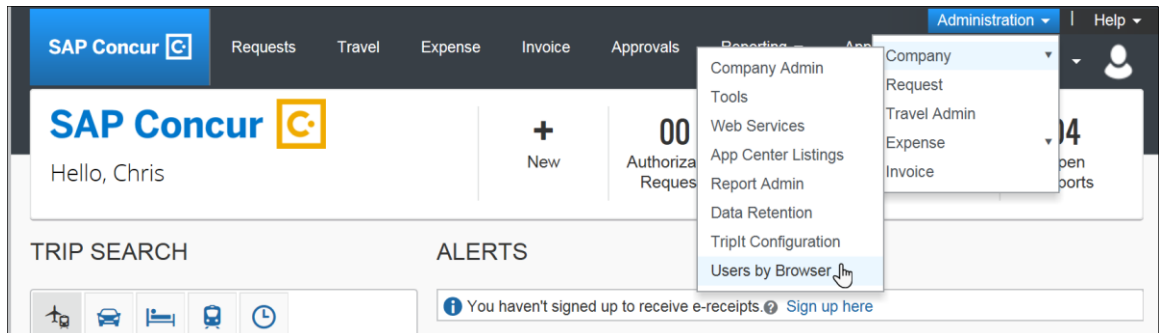
The Users by Browser report has been updated to include more information – all in one place. It now lists all users as well as their browsers and login count.

BUSINESS PURPOSE / CLIENT BENEFIT

The admin no longer has to generate a report for each browser. All users are listed on one report.

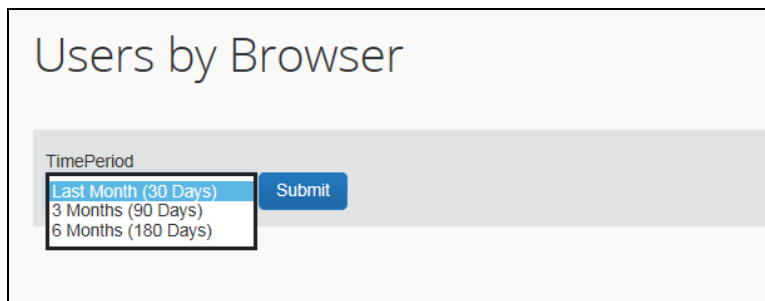
What the Admin Sees

To access the report, the admin clicks **Administration > Company > Users by Browser**.



The **Users by Browser** page appears.

The user selects the desired timeframe and clicks **Submit**.



The report is generated in CSV format.

	A	B	C	D	E	F	G	H	I
1	Login Name	Email	First Name	Last Name	Last Login Date (UTC)	IP Address	Browser	Login Count	
2	mp.com		Melissa		2/28/2018 8:03		Chrome64	4	
3	mp.com		Marta		2/28/2018 1:21		IE11.0	1	
4	amp.com		Danielle		2/28/2018 1:23		IE11.0	1	
5	otcamp.com		Greatest		2/28/2018 1:25		IE11.0	1	
6	otcamp.com		Jaime		2/28/2018 1:28		IE11.0	1	
7	bootcamp.com	camp.com	Randa		2/27/2018 15:52		Chrome64	36	
8	.com		Never		2/28/2018 15:34		Chrome64	8	
9	camp.com		Trainee		2/28/2018 1:19		IE11.0	2	
10	camp.com		Marta		2/28/2018 1:20		IE11.0	3	
11	mp.com	@gmail.com	Andreas		3/1/2018 7:51		IE11.0	14	
12	bootcamp.com	camp.com	Wisam		2/7/2018 14:33		Chrome64	5	
13	mp.com	com	Brian		3/1/2018 7:59		Edge15.15063	8	
14	otcamp.com		Paula		2/28/2018 1:28		IE11.0	1	

Configuration / Feature Activation

The enhancement occurs automatically; there are no additional configuration or activation steps.

Budget

New Budget Feature Generally Available March 19, 2018

This feature will be generally available March 19, 2018 in the US, Canada, Australia, New Zealand, Mexico, Brazil, and United Kingdom. The Budget feature is a purchased service.

Overview

The Budget feature enables clients to set up all components of a budget; a fiscal year to determine the budget period, budget tracking fields to track spending on a cost center (profit center) level, budget categories to group expense types for budget purposes and budgets, which are the actual annual budgets, and Budget Items, which define the budget including fiscal year, budget owner, budget name, and description.

This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense.

NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget feature share data between both calendars.

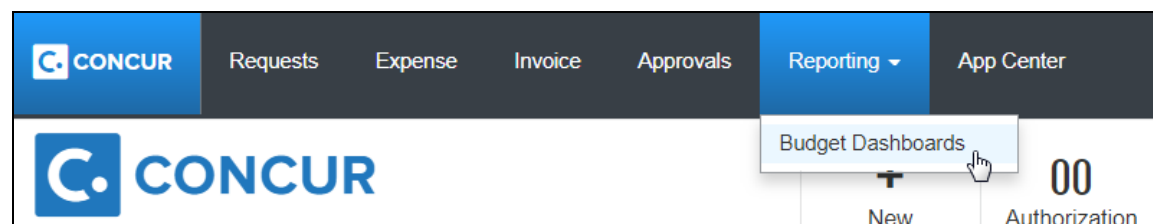
In addition, the Budget feature is available for the Concur mobile app for Expense. Please note that the release for the Concur mobile app occurs seven to ten days after the regular release.

BUSINESS PURPOSE/CLIENT BENEFIT

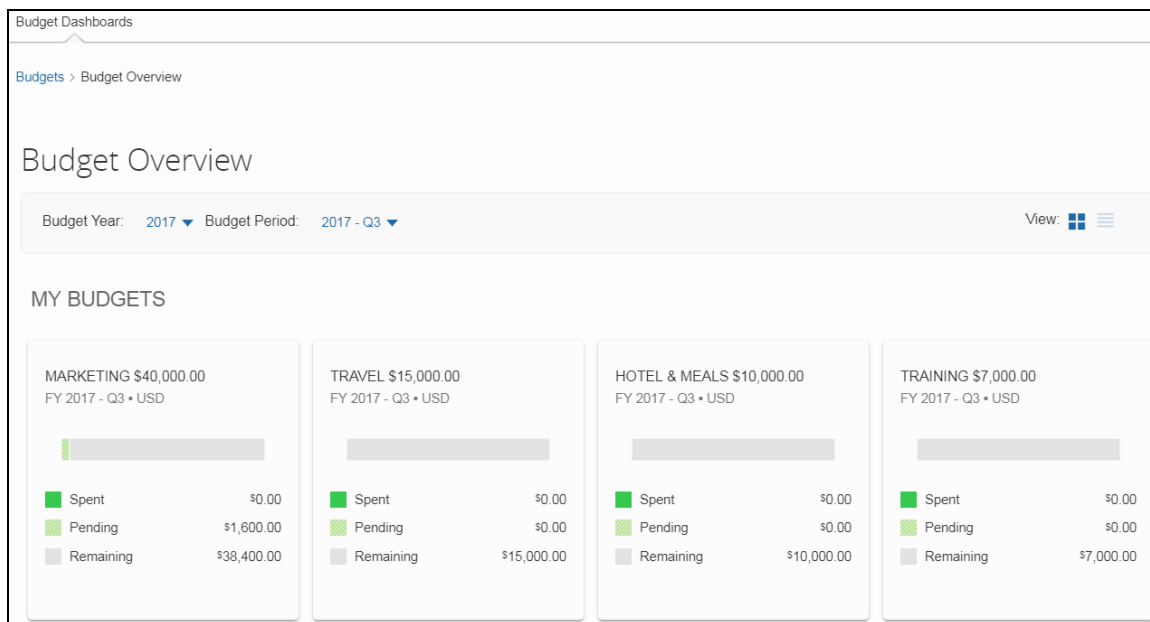
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

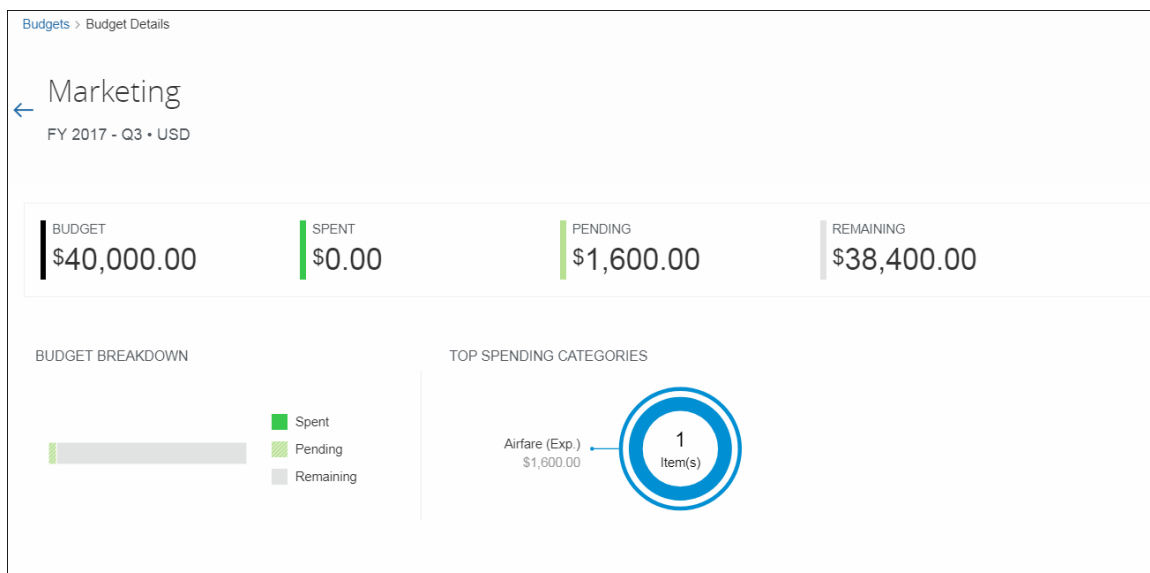
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.



Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



Clicking on one of the budget will show details about that budget.



PENDING						
Export Data Line Items Spending Categories						
Payment Request Purchase Request Expense						
Report Name	Transaction Date	Submitted By	Details	Expense Type	Budget Amount	% of Budget
11142017	11/14/2017	L. Claire	Staples, San Antonio, Texas	Office Supplies	\$67.50	0.16%
1						
SPENT						
Payment Request Purchase Request Expense						
Report Name	Transaction Date	Submitted By	Details	Expense Type	Budget Amount	% of Budget
12232017	12/23/2017	L. Ericka		Trade Shows	\$2,967.66	7.24%
12122017	12/22/2017	L. Yun	Beijiao, Guangdong	Cellular Phone	\$118.64	0.29%
12022017	12/2/2017	L. Joshie	Mitsui, Tokyo, Tokyo	Misc. Promotional Expense	\$149.77	0.37%

What the Admin Sees

The admin will see a new menu, **Budget Configuration**, in Expense Admin. The Budget Configuration page contains five tabs: **Budget Items**, **Fiscal Calendar**, **Budget Category**, **Budget Tracking Fields**, and **Budget Settings**.

NOTE: To access the **Budget Settings** tab, users need to have the Budget Administrator role.

CONCUR Requests Expense Invoice Approvals Reporting Administration Help						
Company Expense Invoice						
Invoice Processing Admin Budget Configuration						
Invoice Processing Admin Accounting Administration Audit Rules Budget Configuration Change Log Company Info Company Locations						
Budget Items Fiscal Calendar Budget Category Budget Tracking Fields Budget Settings						
New Modify Remove Import						
Budget Name	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency	
John01	2017	John Last	John's Budget	\$100,000.00	USD	
John02	2017	John Last	John's Team Budget	\$80,000.00	USD	
John03	2017	John Last	John's Team Trav...	\$40,000.00	USD	

Budget Items tab:

Budget Configuration

Budget Items Fiscal Calendar Budget Category Budget Tracking Fields Budget Settings

New Modify Remove Import

Budget Name ▲	Fiscal Year	Budget Owner	Budget Display ...	Annual Budget	Currency
Company01	2017	John Last	Company Travel ...	\$120,000.00	USD
Company02	2017	John Last	Company IT Budget	\$60,000.00	USD

Page 1 of 1 | Displaying 1 - 21 of 21

Fiscal Calendar tab:

Budget Configuration

Budget Items Fiscal Calendar Budget Category Budget Tracking Fields Budget Settings

New Modify Activate Deactivate Remove

☐ Fiscal Year	Start Date ▼	End Date	Active
☐ 2019	01/01/2019	12/31/2019	Yes
☐ 2018	01/01/2018	12/31/2018	Yes
☐ 2017	01/01/2017	12/31/2017	Yes

Budget Category tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[New](#)
[Modify](#)
[Remove](#)

Budget Category ▲	(Invoice) Expense Types	(Expense) Expense Types
IT	Software Cellular Telephone Telecommunication Equipment Internet Telecommunication Services Computing Equipment	Long Distance Local Phone Cellular Phone
Marketing	Marketing Trade Show	Misc. Promotional Expense Trade Shows
Travel	Travel Conference/Seminar Fees	Company Car Mileage Fixed Meals (gross) Limousine Company Car Wash Subway Company Car Oil Fixed Meals Room Tax Gas

< < | Page 1 of 1 | > > | ↺

Displaying 1 - 3 of 3

Budget Tracking Fields tab:

Budget Configuration

[Budget Items](#)
[Fiscal Calendar](#)
[Budget Category](#)
[Budget Tracking Fields](#)
[Budget Settings](#)

[Budget Fields](#)
[Budget Field Mapping](#)

[New Field](#)
[New Connected Field](#)
[Modify](#)
[Remove](#)
[Save Sequence](#)

☐ Budget Tracking Field	Field Type	List	Sequence ▲
☐ Department Function	Connected List	Function	↓
☐ Region Country	Connected List	Geography	↓ ↑
☐ Product Group Product	Connected List	Product	↓ ↑

Budget Settings tab:

Budget Configuration

Budget Items | Fiscal Calendar | Budget Category | Budget Tracking Fields | **Budget Settings**

Save **Cancel**

Time Zone:

Alert Limit Percent:

Control Limit Percent:

Send alert limit notifications: ☐

Send control limit notifications: ☐

Restrict notifications for past Budgets: ☐

Alternative Manager:

Include Pending: ☐

Disable Budget Tracking Mapping Field Type filter: ☐

Enable Budget Capture for Expense: ☐

Enable Budget Capture for Purchase Request: ☐

Enable Budget Capture for Invoice: ☐

Configuration/Feature Activation

Concur needs to activate this features in a Concur internal-only tool.

Once Concur has activated the Budget feature, the Budget Administrator needs to configure the feature in the Budget Configuration tool in Expense Admin.



For more information, refer to the *Shared: Budget Setup Guide*, the *Shared: Budget Item Import User Guide*, the *Budget Client Fact Sheet*, and the *Budget FAQ*.

Expense Pay

Additional Card Programs Now Supported for USD

Overview

Expense Pay – Global now supports the following credit card programs for the United States Dollar (USD \$):

- Capital One MasterCard USD
- PNC Bank Visa USD

BUSINESS PURPOSE/CLIENT BENEFIT

These additional options can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

The screenshot shows a web form titled "Add New Card Program" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Program Name:** A text input field.
- Payment Type:** A dropdown menu.
- Program Type:** A dropdown menu, which is highlighted with a red circle. To its right is a blue link labeled "Verify IIN".
- Currency:** A text input field.
- Active:** A dropdown menu currently set to "Yes".
- Classic:** An unchecked checkbox.
- Global:** An unchecked checkbox.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

Consent Term Clarified from "Agree" to "Authorize"

Overview

For all users who opt-in to receive payments via Expense Pay, both Expense Pay – Global and classic Expense Pay, the term "agree" has been changed to "authorize" in the Concur User Interface (UI).

BUSINESS PURPOSE/CLIENT BENEFIT

This change provides greater legal clarity for the instruction that users authorize direct deposits from Concur for classic Expense Pay or a Concur payment-processing partner for Expense Pay - Global.

What the User Sees

EXPENSE PAY – CLASSIC

Users of Expense Pay – Classic will see this change in the UI:

- On the **Profile > Profile Settings > Bank Information** page, the button that read, "Save And Agree," now reads, "Save And Authorize."

The image displays two side-by-side screenshots of the 'Bank Information' form in the Concur User Interface. The left screenshot, labeled 'BEFORE', shows the form with a blue button at the bottom that reads 'Save And Agree'. The right screenshot, labeled 'AFTER', shows the same form but with the button text changed to 'Save And Authorize'. Red arrows point from the 'BEFORE' button to the 'AFTER' button, highlighting the change. The form fields include Bank Country (dropdown), Routing Number, Bank Name, Status, Personal Address Line 1, City, Bank Currency (dropdown), Bank Account Number, Re-Type Bank Account Number, Branch Location, Account Type (dropdown), Active (dropdown), Personal Address Line 2, State, and ZIP Code.

EXPENSE PAY – GLOBAL

Users of Expense Pay – Global will see these changes in the UI:

- On the **Profile > Profile Settings > Bank Information** page, the “Agree to the use requirement below” checkbox label now reads, “I authorize the use requirement below.”

Configuration/Feature Activation

Concur automatically implemented these changes; there are no configuration or activation steps.

Legacy Expense Authorization Request

Disabled Policy Setting for Legacy Expense Authorization Request

Overview

As preparation for the impending retirement of the legacy Expense Authorization Request feature, as part of the March 17, 2018 release, the ability to modify the setting to control creation of legacy Authorization Requests has been made read-only on the **Expense Policy** page.

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018. A client-facing FAQ is available:

http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

⚠ IMPORTANT: Please also read the following release note: *Legacy Expense Authorization Request | Product Retirement March 31, 2018* in these March release notes.

WHAT THE EXPENSE ADMINISTRATOR SEES

With the March release, the field **Disable ability to create new Authorization Request** on the Expense Policy is modified to be read-only. This field and others pertaining to the settings for legacy Authorization Request are only shown when the company is using the legacy Authorization Request.

NOTE: The value in this field is not altered with the March 17, 2018 release, but will be selected (checked to prevent creation of new authorization requests) automatically on the retirement date, March 31, 2018.

The screenshot shows the 'Modify Policy: CA Expense Policy' interface. Under the 'General' tab, several configuration fields are visible:

- Name: CA Expense Policy
- Expense Report Form: Default Report Information
- Expense Report Workflow: CES Standard Report Workflow
- Authorization Request Header Form: None
- Authorization Request Workflow: None
- Authorization Request Active Days: (empty field)
- Disable ability to create new Authorization Requests: ☐ (highlighted with a red circle)
- Scan Configuration: None

Configuration

This change is applied automatically.

If a company using legacy Authorization Request has a need to create a new Expense policy after this change and before the retirement of the feature, the administrator may copy a policy with the desired value for this field. The copied policy will retain the value from the original policy, and can subsequently be edited to create the desired new policy.

Product Retirement March 31, 2018

⚠ IMPORTANT: Please also read the following release note: *Disabled Policy Setting for Legacy Expense Authorization* in these March release notes.

Overview

Concur plans to retire our legacy Expense Authorization Request feature on March 31, 2018.

Concur offered this feature to some clients prior to the existence of the standalone Concur Request product. We now have feature parity as well as enhanced features and full support on the standalone Request product. Clients that wish to leverage a request capability within Concur should purchase and migrate to the Concur Request product.

A client-facing FAQ is available: http://assets.concur.com/concurtraining/cte/en-us/legacy_request_retirement_faq.pdf

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement allows Concur to focus development resources on further enhancements to our standalone Concur Request product whose functionality, innovation, and value now exceeds that of our legacy feature.

Configuration/Feature Activation

Concur has already initiated communication with clients who have recently used our legacy Expense Authorization Request feature to plan migrations to our standalone Concur Request product.

For this change, Concur has archived the *Expense: Authorization Requests Setup Guide* and *Expense: Authorization Requests User Guide*.

Next Generation (NextGen)

Expense User Interface

New User Interface for Concur Expense End Users

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **Preview Period:** The Preview Period begins March 17, 2018 and runs through September 2018. During this time, the new UI will be available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (until March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a

consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Travel Allowance

(Czech) Deductions on Government Rates

Overview

Before this change, when customers using both COMP and GOVT rates deducted meals, it has been discovered that the proper percentages set up in the **Calculation Properties** were being used for COMP rates, however they were not being used for the GOVT rates. The taxable/non-taxable calculation was not correct.

After this change, both COMP rates and GOVT rates are deducted as specified in the calculation property for partial days. The above limit (taxable amount) calculated is correct when calculation property **use_govt_meal_deduction_for_both_config** is enabled.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement provides correct calculations.

What the User Sees

If you enable this feature, employees will see a difference in calculated, above limit, taxable amounts.

What the Admin Sees

The **Calculation Properties** tab of the **Travel Allowance** page displays the new **Calculate GOVT Meals Deductions for BOTH CONFIG** option.

Travel Allowance

Configurations
Employee-Related Configurations
Rates
Configuration Sets
Itinerary Search
Calculation Properties

Calculation Method: Czech Rules ▼

Modify

Name	Label	Type	Value
meal_deduction_f_band_four_rate	Fourth Foreign Meal Deduction Rate (percent)	edit	25
meal_deduction_f_band_one_mi...	First Foreign Meal Deduction Time Band Minutes (integer between 0 a...	edit	60
meal_deduction_f_band_one_rate	First Foreign Meal Deduction Rate (percent)	edit	0
meal_deduction_f_band_three_...	Third Foreign Meal Deduction Time Band Minutes (integer between 0 a...	edit	1080
meal_deduction_f_band_three_rate	Third Foreign Meal Deduction Rate (percent)	edit	35
meal_deduction_f_band_two_mi...	Second Foreign Meal Deduction Time Band Minutes (integer between ...	edit	720
meal_deduction_f_band_two_rate	Second Foreign Meal Deduction Rate (percent)	edit	35
pocket_money_rate	Pocket Money Rate (percent)	edit	0
use_govt_meal_deduction_for_b...	Calculate GOVT Meals Deduction For BOTH CONFIG	checkb...	Y

Configuration/Feature Activation

Concur automatically added this setting to the **Calculation Properties** tab. To enable the option, perform the following steps.

NOTE: This new setting is on (Y) by default.

To disable this option:

1. Click **Administration** > **Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Travel Allowance** (left menu).
3. Click the **Calculation Properties** tab.
4. In the **Calculation Method** list, select *Czech Rules*.
5. Click **use_govt_meal_deduction_for_both_config**, and then click **Modify** to disable it.



For more information about Travel Allowance for Czechia, refer to the *Expense: Travel Allowance Configuration Guide - Czech*.

(Poland) New Setting for Optional Domestic Segments Merge

Overview

Currently, when the **use_24_hour_day_separation** enhancement is enabled, domestic segments from the first day of mixed travel and the immediate next day of mixed travel are merged.

In order to disable this domestic segment merge, a new calculation property has been introduced: **disable_domestic_merge_for_24_hour_day_separation**.

When this property is checked, the domestic merge will no longer take place.

This new setting applies to 24-hour day calculations and requires the **use_24_hour_day_separation** property to be enabled, to take effect.

BUSINESS PURPOSE/CLIENT BENEFIT

The new calculation property will give client Admins the option to disable the merge of the domestic segments of travel. Instead of the merge, these segments of travel will continue to be a part of the separate 24-hour day calculation logic.

What the User Sees

If you enable this setting for the travel allowance feature, employees will see a difference in total allowance calculation for mixed trips.

What the Admin Sees

The **Calculation Properties** tab of the **Travel Allowance** page displays the new **Disable Domestic Merge for 24Hr Day Separation Enhancement** option.

Travel Allowance

Configurations Employee-Related Configurations Rates Configuration Sets Itinerary Search Calculation Properties

Calculation Method: Poland Rules

Modify

Name	Label	Type	Value
disable_domestic_merge_for_24_hour_day_sep...	Disable domestic merge for the 24hr day separation enhancement.	checkbox	Y
domestic_combined_lunch_dinner_deduction_fa...	Domestic combined lunch and dinner factor	edit	50
domestic_extended_trip_factor	Domestic Extended Trip Factor (percent)	edit	100
domestic_extended_trip_factor_company	Domestic Extended Trip Company Factor (percent)	edit	100
domestic_extended_trip_limit	Domestic Extended Trip Days (integer)	edit	30
domestic_meals_percent	Low Meals Rate (percent)	edit	50
domestic_use_prorated_deductions	For Domestic Trips Use Prorated Deductions (Y/N)	checkbox	N
high_hours	High Hours (integer between 0 and 23)	edit	12
international_combined_lunch_dinner_deduction...	International combined lunch and dinner factor	edit	50
international_extended_trip_factor	International Extended Trip Factor (percent)	edit	100
international_extended_trip_factor_company	International Extended Trip Company Factor (percent)	edit	100
international_extended_trip_limit	International Extended Trip Days (integer)	edit	30
intl_high_meals_percent	International High Meals Rate (percent)	edit	50
intl_low_meals_rate	International Low Meals Rate (percent)	edit	33.3334
intl_use_prorated_deductions	For International Trips Use Prorated Deductions (Y/N)	edit	N
low_hours	Low Hours (integer between 0 and 23)	edit	8
use_24hour_day	Use 24 hour day	edit	Y
use_24_hour_day_separation	Use domestic and international trip separation for 24 hour day (Y/N)	edit	Y
use_combined_lunch_dinner_deduction_cap	Use combined lunch and dinner cap	edit	N

Configuration/Feature Activation

Concur automatically added this setting to the **Calculation Properties** tab. To enable the option, perform the following steps.

NOTE: This new setting is off (N) by default.

To enable this option:

1. Click **Administration > Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Travel Allowance** (left menu).
3. Click the **Calculation Properties** tab.
4. In the **Calculation Method** list, select *Poland Rules*.

5. Click **disable_domestic_merge_for_24_hour_day_separation**, and then click **Modify** to enable it.



For more information about Travel Allowance for Poland, refer to the *Expense: Travel Allowance Configuration Guide - Poland*.

Planned Changes

The items in this section are targeted for future releases. Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Accessibility

****Planned Changes** Remove All Instances of "ConcurAccessible"**

This release note has been removed but will be included for a future release.

Admin

****Planned Changes** Expense Assistant Can Create Trip-based Expenses Reports**

This release note has been removed but will be included for a future release.

****Planned Changes** Removing the "Privacy Agreement" Page**

Overview

For clients who currently display the **Privacy Agreement** page to users, be aware that on **April 14, 2018**, Concur will eliminate that page. That means, the privacy agreement will no longer display, under any circumstances. In addition, the options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

In a separate release, Concur will provide a standard privacy statement, which can be accessed via a link in the page footer.

This release note discusses the removal of the **Privacy Agreement** page and its associated configuration options. Information about the new Concur privacy statement will be provided in future release notes.

The intent of the change is to ensure that all customers see the same unmodified Concur privacy statement.

FAQs

Q. Why can't I continue using this feature?

A. Concur is working to ensure that all customers have simple and direct access to the latest privacy statement available within Concur services.

Q. When will the existing **Privacy Agreement** page be removed?

A. On April 14, 2018, the page will be removed; users will no longer see the privacy agreement – whether customized or generic.

Between now and April 14, if you want to remove your customized privacy agreement from the **Privacy Agreement** page, you can. For clients who have access to the custom text option or the privacy agreement settings, you can make those changes yourself. For clients who do not have access to the custom text option or the privacy agreement settings, you can contact Concur Client Support for assistance.

No action is necessary. You do not have to make changes now unless you want to.

Q. What will Concur provide in place of the current **Privacy Agreement** page?

A. Some clients have used the **Privacy Agreement** page to convey company-specific information to its users. That option will no longer be available. Instead, the Concur privacy statement – accessible via a link the page footer – will describe Concur’s processing activities of customer data.

Q. What should I do if the new privacy statement requires additional communication for my business?

A. Clients must evaluate and find alternative methods of communicating any separate privacy statements or information with their employees.

Q. When the new Concur privacy statement is implemented; will I be able to modify it or require that users accept it?

A. The Concur privacy statement will not be configurable by clients in any way. Its function is to describe Concur’s processing activities of client data.

Q. Who can I contact for more information?

A. You can contact Concur Client Support for additional information regarding these settings and/or Concur’s updated privacy statement.

Configuration / Feature Activation

The **Privacy Agreement** page and associated configuration options will be automatically removed. For additional information about the configuration options that will be removed, refer to the Concur Travel release notes.

Company Card

**** Planned Changes ** Change to AMEX GL 1022 “No Vendor Supplied” Card Feed Data Handling**

Overview

In an upcoming release, clients moving to the GL-1022 American Express card feed can expect enhanced handling of the “American Express Initiated Activity” data to match that of the GL-1025 feed. With this upcoming change, data will yield values for **Merchant Name** and/or **Vendor Name** instead of returning a “No Vendor Supplied” message.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement updates the GL-1022 data reconciliation to match the behavior of the GL-1025 card feed, as requested by our Brazilian clients adopting the GL-1022 feed.

Preparing for This Change

Clients whose audit rule definitions will trigger based on the existing *Vendor Name = No Vendor Supplied* feed return value should review and, if necessary, update these configurations to match the new behavior of the GL-1022 card feed.

Configuration/Feature Activation

Concur will automatically implement this change.

Data Retention

****Planned Changes** New Feature for Outdated Data**

Overview

This new feature will allow clients to control how long Concur stores their data based on who, when, and where criteria.

BUSINESS PURPOSE/CLIENT BENEFIT

This feature gives clients the ability to meet their specific compliance needs regarding data retention.

What the Admin Sees

When this feature becomes available, and if it has been requested via Concur Client Support, then on the **Company Admin** page, the client admin will see a **Data Retention** link.

More information will be available in future versions of these Release Notes.



When this feature becomes available, for more information, refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide*.

Configuration/Feature Activation

When this feature becomes available, you may request that it be enabled for your company by contacting Concur Client Support.

In-Product Messaging

****Planned Changes** Opt Out of In-Product Messaging (United States)**

Overview

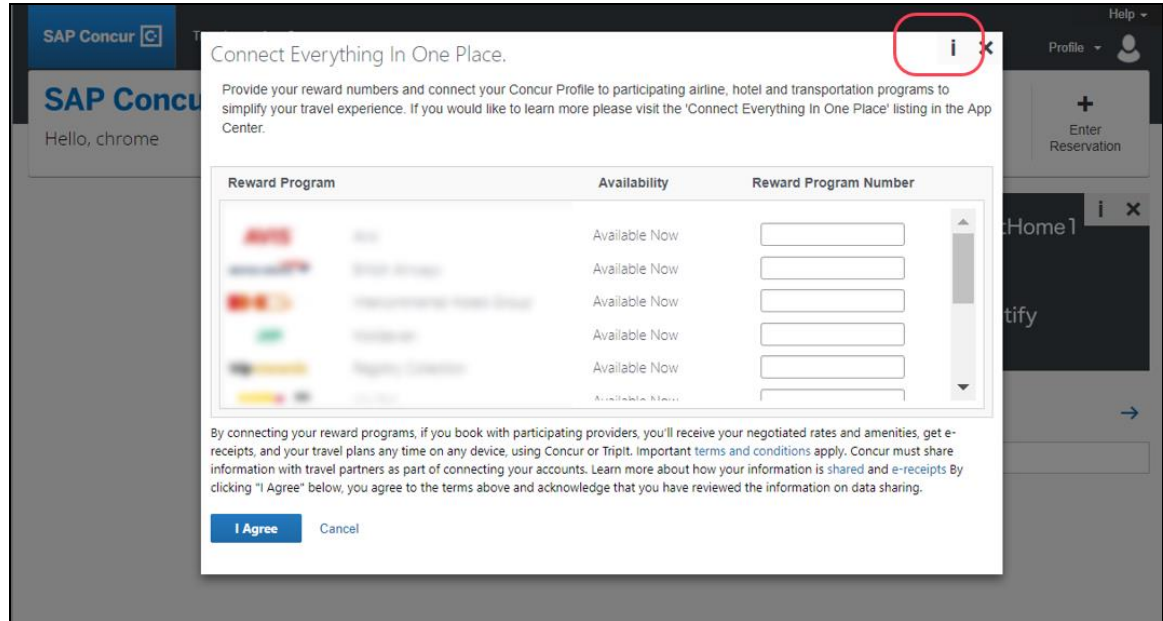
Last year, when in-product messaging was introduced in Europe, the feature included the ability for users to opt out of messaging.

In a future release, Concur will provide customers in the United States the ability to opt out.

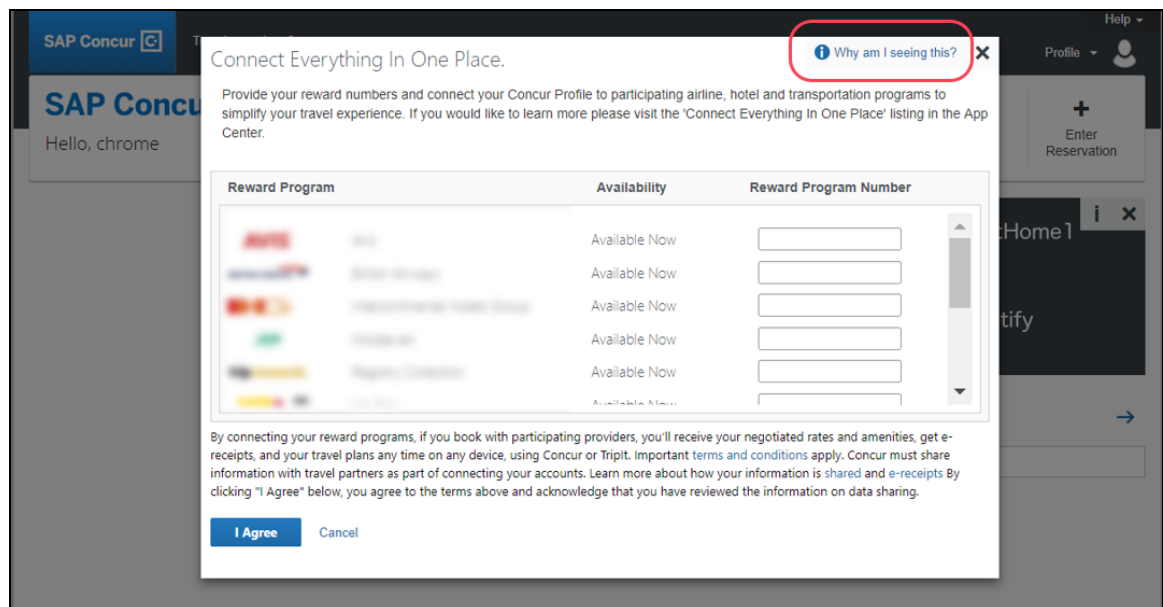
What the User Sees

MESSAGES

An information icon appears in the upper-right corner of the message.

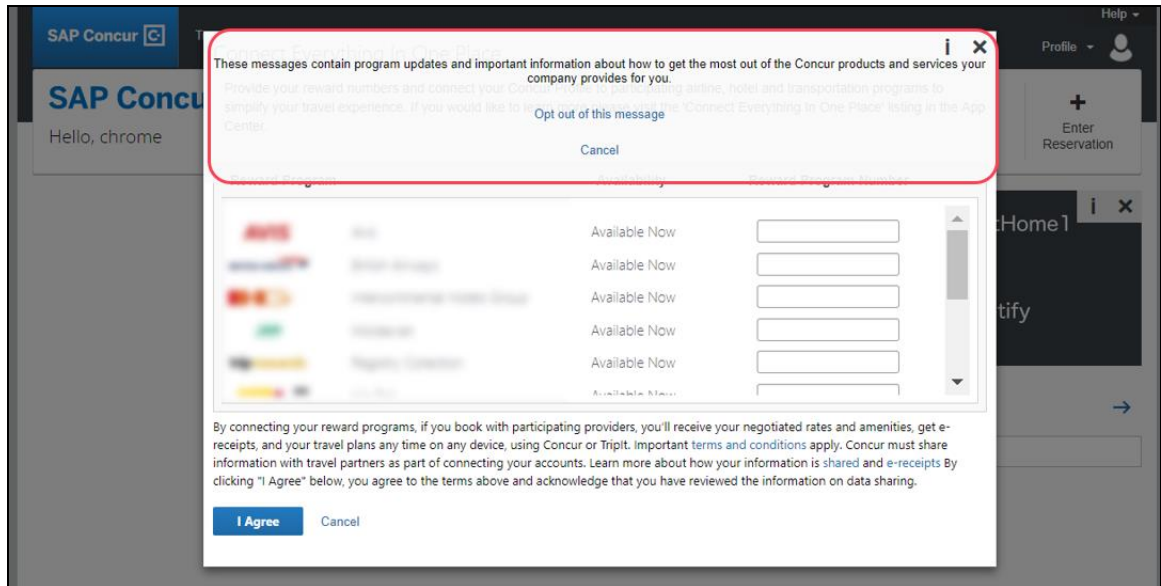


When the user clicks it or hovers the mouse pointer over it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to

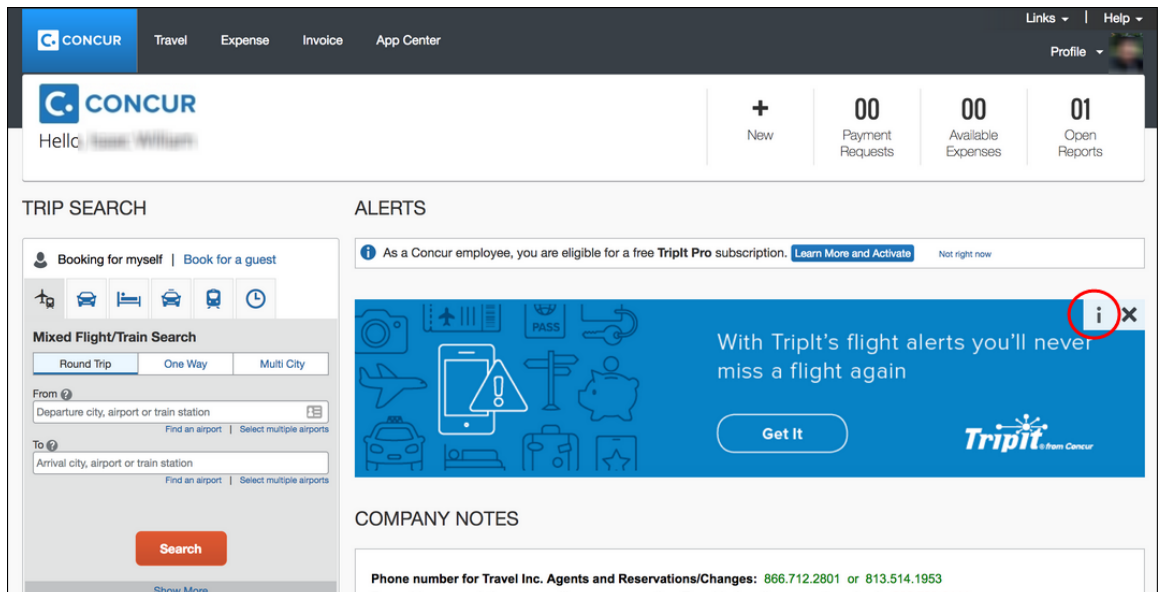
click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other categories.



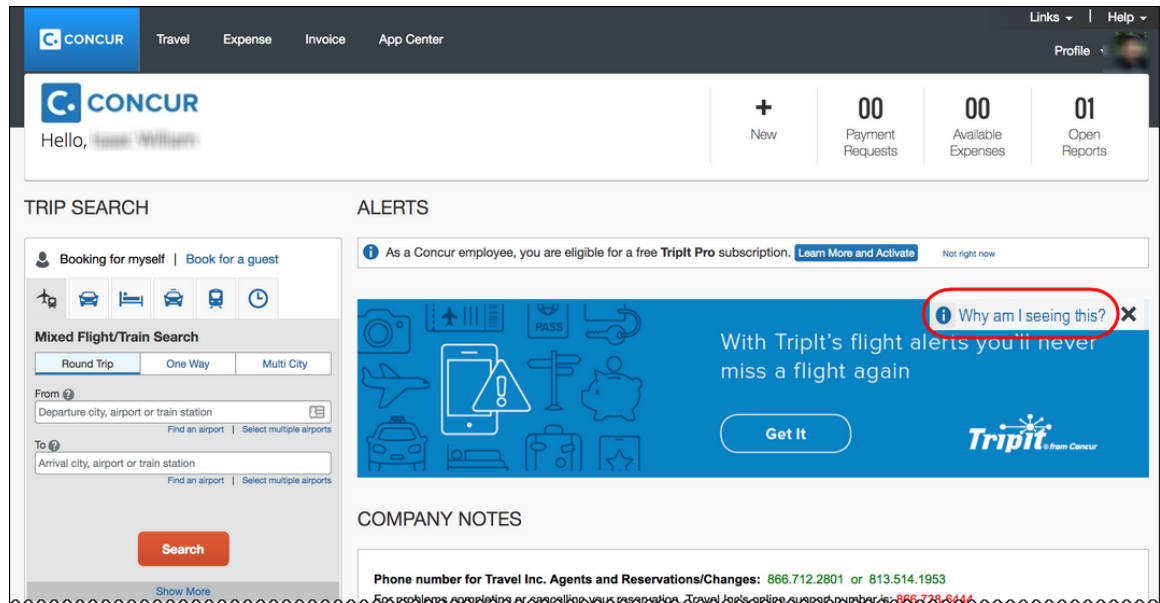
When the user clicks the close button (X in the upper-right corner), the window closes.

IN-PAGE MESSAGES

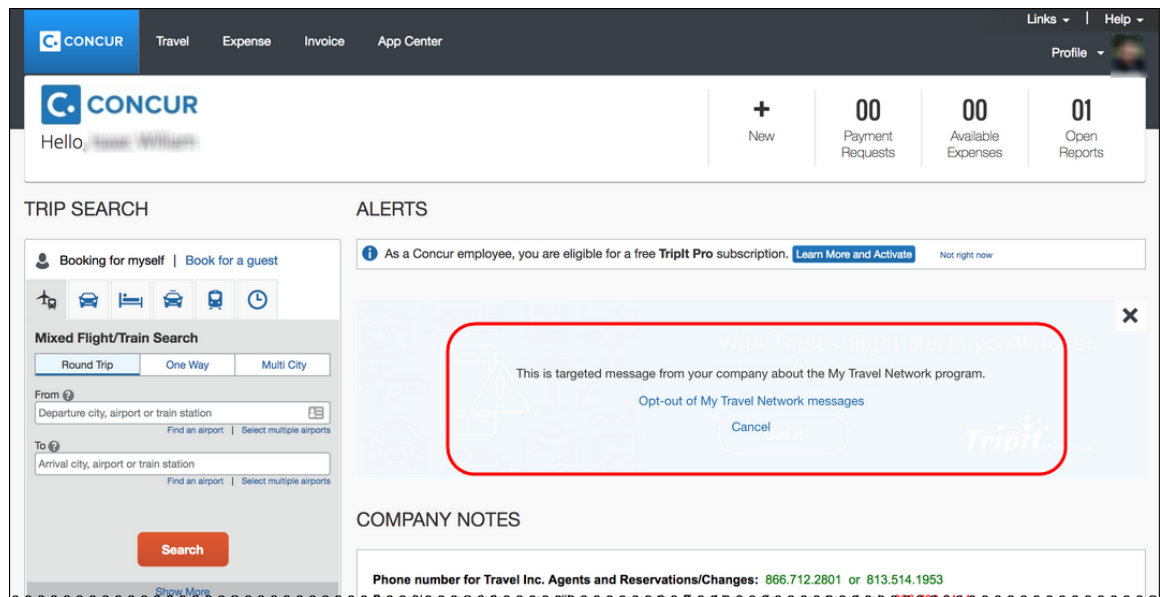
An information icon appears in the upper-right corner of the message.



When the user clicks it, the *Why am I seeing this?* message appears.



When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this message as well as a link for the user to click to opt out of seeing similar messages in the future. The user could still be shown IPM relating to other categories.



When the user clicks the close button (X in the upper-right corner), the message collapses and is removed from the page entirely.

Configuration / Feature Activation

Concur will automatically implement this change; there will be no additional configuration or activation steps.

Japan Public Transport (JPT)

****Planned Changes** IC Card Readers Will Support Company-Level Authentication**

Overview

The IC Card Reader solution will switch authentication processes during the weekend of April 14th and 15th, 2018. The maintenance time will be provided in a future version of these release notes.

BUSINESS PURPOSE/CLIENT BENEFIT

This change will simplify user activation and allow transactions to show more quickly in **Available Expenses**.

What the User Sees

Users should be aware of these three important changes.

1. During maintenance time, users will not be able to read and send IC Card transaction to Concur Expense.
2. After this change, the User Activation step will become unnecessary. This step is currently described in the *Expense: Japan Public Transportation User Guide*.

NOTE: This change will apply only for the users of the Pit Touch Pro2 IC Card Reader device. For Android Tablet type IC Card Reader device users, the user activation process will not change.

3. After this change, multiple not-yet-sent train transactions will reach to Concur and shown in **Available Expenses**. If the current authentication per user failed (i.e. token expired) and the user has not done re-activation with an activation email, train usage transactions retain a "not sent" status. Such not-yet-sent transactions will be sent by a daily automatic retry process after this change.

Configuration/Feature Activation

Concur will automatically implement these changes; there are no configuration or activation steps.

New Filter

****Planned Changes** New 23-Month Filter**

Overview

NOTE: This release note supersedes the January release note: *Available Expenses | **Planned Changes** New One-Year Filter*.

A 23-month filter will be included with the new Data Retention feature. The filter will impact the following areas:

- Available Expenses
- View Transactions
- Unassigned Cash Advances

 **IMPORTANT:** Clients who do not enable Data Retention will see no change.

This new feature will automatically filter older transactions. The 23-month time is not configurable. Clients who opt to enable the new Data Retention feature automatically turn on the 23-month filter.

Under View Transactions, statement periods older than 23 months will also be filtered out.

BUSINESS PURPOSE/CLIENT BENEFIT

This filter will reduce the accumulation of unprocessed transactions over time and support the new Data Retention feature.

Configuration/Feature Activation

For more information, refer to the *Data Retention | **Planned Changes** New Feature for Outdated Data* release note included in this month's Planned Changes section of these Release Notes.

Plain Text File Transfer Protocol

****Planned Changes** Support for Plain Text FTP to End on May 15th, 2018**

Overview

Concur is announcing the End of Support for plain text FTP as a means to transfer data to and from Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15th, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

BUSINESS PURPOSE/CLIENT BENEFIT

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (US Datacenter)
- st-eu.concursolutions.com (EMEA Datacenter)

Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (Concur preferred method)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [Concur Non-Affiliated Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

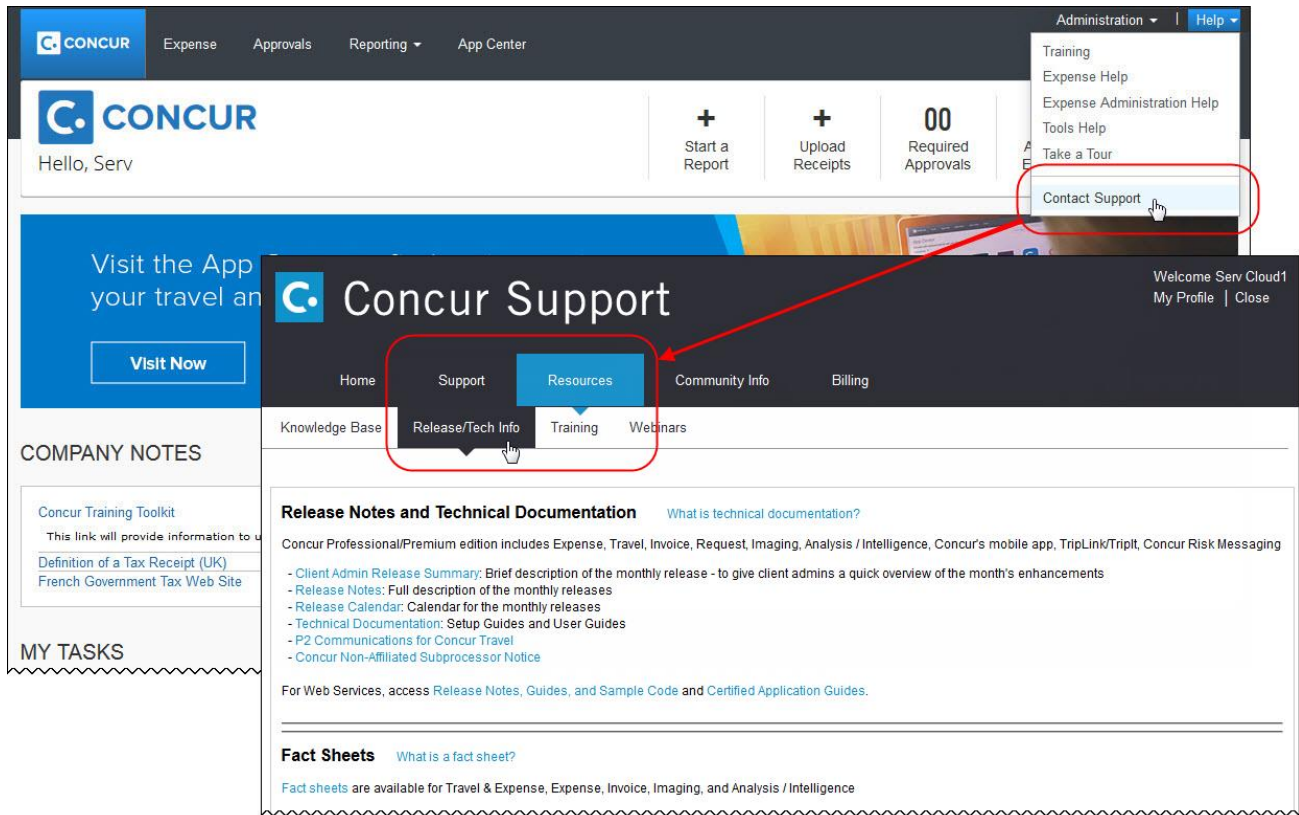
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.

The screenshot displays the Concur Expense Administration Help interface. At the top, the navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The main header shows the Concur logo, a user greeting 'Hello, Terry', and summary statistics: 61 New Authorization Requests, 08 Purchase Requests, and 696 Payment Requests. A 'Help' dropdown menu is open, listing various help topics, with 'Expense Administration Help' highlighted. Below this, the 'Resources for Administrators - Professional Edition' page is shown, featuring a sidebar with links like 'Using Online Help', 'Legal Notice', and 'Resources for Administrators - Professional Edition' (highlighted). The main content area lists 'What's New - Professional Edition', 'Client Fact Sheets (English only)', 'User Interface Icons', 'Concur Training Toolkit', and 'Concur for Mobile (English only)'. A second screenshot below shows the 'Expense Professional Administration Guides' page, with a sidebar highlighting 'Expense Professional Administration Guides' and a main content area listing various guides like 'Expense Setup Guides (English Only)', 'Account Codes', 'Allocations', 'Attendees', 'Audit Rules', 'Audit Rules (Validation Rules)', 'Budget Insight', 'Car Configuration', and 'Cash Advance'.

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



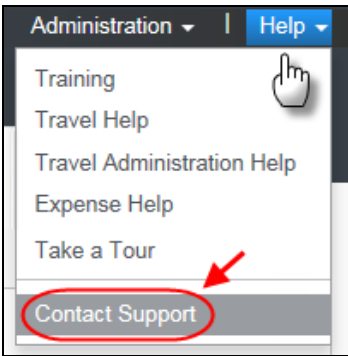
Cases

Steps for Getting a Status

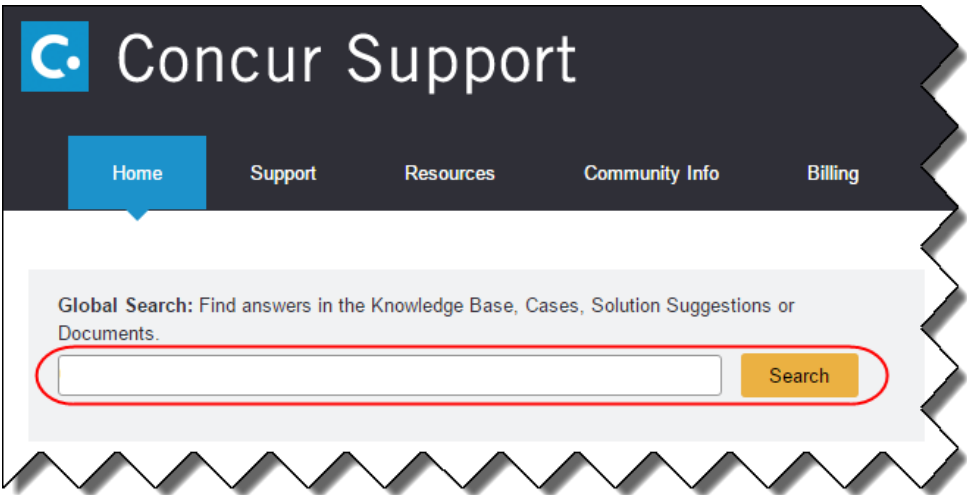
Each service release contains case resolutions.

► **How to check the status of a submitted case**

6. Log on to <https://concursolutions.com/portal.asp>.
7. Click **Help > Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the Concur system internally. Please contact your internal support desk for assistance.

- 8. Enter your **Case ID**.
- 9. Click **Search**. Search results are limited to each company's own cases.

March Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11271275	Expense Pay - Global An employee report repeatedly aborted with the message that the banking system had returned a payment demand. <i>Concur corrected this issue by increasing the number of allowable characters in the bank name field. The report now runs successfully.</i>

SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: June 16, 2018 Initial Post: Friday, June 15, 10:30 AM PT	Client FINAL

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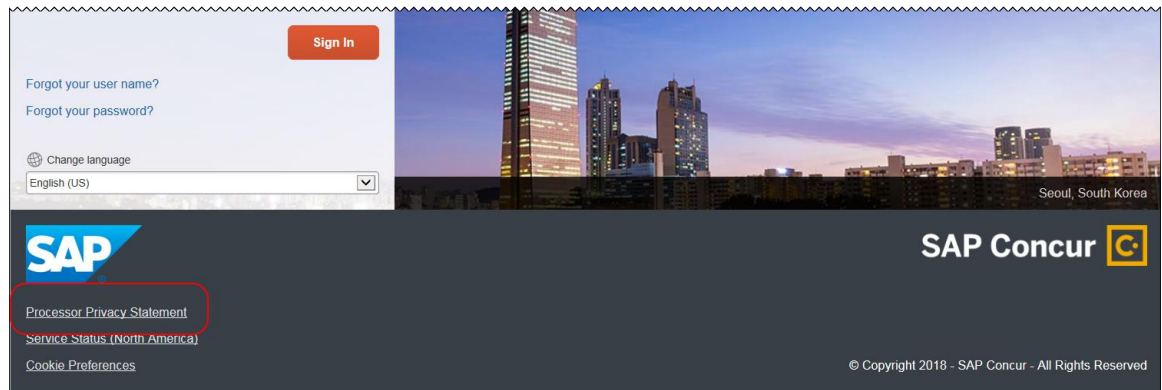
Release Notes

Admin

Processor Privacy Statement Link in Online Help

Overview

The **Processor Privacy Statement** link is available in the SAP Concur footer.



However, not all pages in SAP Concur display the footer. In this case, the user can:

- Return to the Home page and click the **Processor Privacy Statement** link there
– **or** –
- With the June release, click the **Processor Privacy Statement** link in online Help.

Configuration/Feature Activation

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

****Reminder** New Cookie Consent Process**

Overview

Europe has very specific user-consent requirements for cookies. There are two types of consent when allowing cookies to be saved on the user's computer. As described on the following pages, each country decides which option to use. The options are:

- **Active consent:** The user actively agrees to allow cookies. In this case, SAP Concur is required to obtain user consent before saving any cookies on a user's computer.

- **Passive consent:** The user does not disallow cookies.

Each country decides which option it wants to use.

IMPORTANT

This release note discusses consent for and modification of cookies. Note the following:

- TrustArc, a global privacy and data governance provider, manages the cookie preference choice of each user for SAP Concur. Several consent options are described on the following pages.
 - ♦ Be aware the TrustArc provides all consent text and manages all translations of the consent text. Neither SAP Concur nor its customers can affect the text or translation in any way.
 - ♦ Consent regulations differ by country. TrustArc determines the consent option that is appropriate for each user, based on each country's regulations. SAP Concur cannot affect that determination in any way nor does SAP Concur have a list of countries and their consent regulations.
- Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.
- SAP Concur uses geolocation – based on the user's IP address – to identify the user's location (country), which determines if user consent is active or passive. Be aware that if the user is using VPN, then geolocation will likely identify the user's country as the country associated with the VPN.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. ***There is no option for companies to make these choices for their users.***
- Once a user has actively accepted cookies, they cannot modify their cookies options to stop accepting cookies except to remove all cookies and start over.

BUSINESS PURPOSE/CLIENT BENEFIT

These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

As noted above, each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

ACTIVE CONSENT REQUIRED

If active consent is required – before the user can access any SAP Concur page – the user sees the **About cookies on this site** window.

About cookies on this site



Cookies are important to the proper functioning of a site. To improve your experience, we use cookies to remember log-in details and provide secure log-in, collect statistics to optimize site functionality, and deliver content tailored to your interests. Click Agree and Proceed to accept cookies and go directly to the site or click on View Cookie Settings to see detailed descriptions of the types of cookies and choose whether to accept certain cookies while on the site.

[Agree and Proceed](#)
[View Cookie Settings »](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

[Privacy Policy](#) | Powered by:  [TrustArc](#) | [TRUSTe](#)

The user can:

- Read the agreement text and then click **Agree and Proceed**; the user is then directed into SAP Concur.
- **or** –
- Click **View Cookie Settings** to see other options.

NOTE: The user cannot bypass this page. If the user chooses to **not** accept cookies, the user cannot access SAP Concur.

If the user clicks **View Cookie Settings**, this page appears.

About cookies on this site SAP Concur

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

— REQUIRED COOKIES

These cookies are required to enable core site functionality.

— FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

— **ADVERTISING COOKIES**

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

Cancel **Submit Preferences** **Advanced Settings**

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by: TrustArc | TRUSTe

On this page, the user can slide the bar on the left to accept:

- **Required cookies:** Those required to use SAP Concur services.
- **Required and functional cookies:** Required cookies *plus* those used for performance and usage analysis.
- **Required, functional, and advertising cookies:** Required cookies *plus* functional cookies *plus* cookies used for advertisements.

The user can:

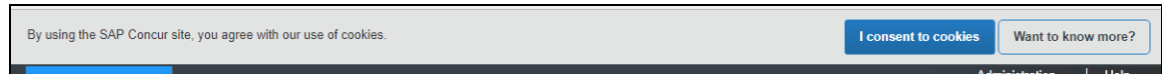
- Click **Cancel** and return to the previous page.
— **or** —
- Slide the bar to make their choice and then click **Submit Preferences**.
— **or** —
- Click **Advanced Settings**.

If the user clicks **Advanced Settings**, they will see a read-only view of the existing cookies.

Once the user consents, the requirement is satisfied and the consent message does not appear again.

PASSIVE CONSENT

In some countries, once the user has accessed SAP Concur, a banner similar to the one below appears at the top of the SAP Concur page.



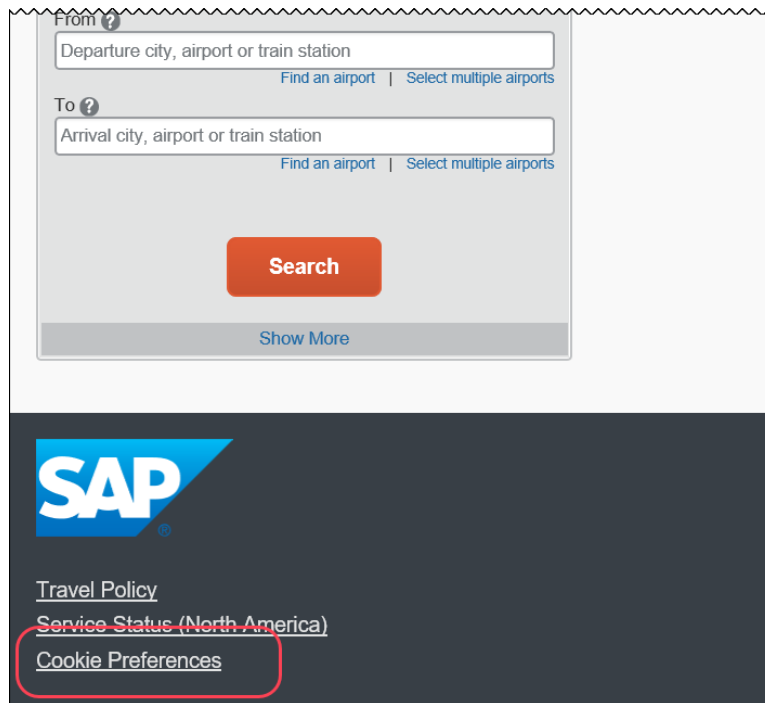
Whether or not the user actively consents, consent is implied. The user can continue to work in SAP Concur and the banner does not interfere with the user's tasks; however, the banner remains until the user clicks **I consent to cookies**.

The user clicks **Want to know more?**, the user sees the cookie options (as described previously).

Once the user consents, the requirement is satisfied and the banner does not appear again.

MAKING CHANGES

The **Cookie Preferences** link appears in the SAP Concur footer.



The screenshot shows the SAP Concur footer. At the top, there is a search form with 'From' and 'To' fields, each containing a placeholder 'Departure city, airport or train station' and 'Arrival city, airport or train station' respectively. Below these fields are links for 'Find an airport' and 'Select multiple airports'. A red 'Search' button is centered below the fields, and a 'Show More' link is at the bottom. Below the search form is the SAP logo. Under the logo, there are links for 'Travel Policy', 'Service Status (North America)', and 'Cookie Preferences'. The 'Cookie Preferences' link is highlighted with a red circle.

This link allows users to view their existing cookie settings. To modify existing cookie preferences, TrustArc requires that the user clear all existing cookies and then choose a new setting.

! IMPORTANT: Not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Cookie Preferences** link there.

Configuration/Feature Activation

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

****Reminder** Whitelist for TrustArc.com**

Overview

The May release notes included an item named *New Cookie Preferences Link in the SAP Concur Footer*. It describes cookie-related process changes that were introduced in the May 12 release because of specific consent regulations in Europe.

To ensure that SAP Concur properly responds to the regulations, SAP Concur has enlisted the assistance of TrustArc, a global privacy and data governance provider.

Please ensure that your organization's IT (or similar) department adds TrustArc to its whitelist, so TrustArc can properly monitor and manage these processes.

TrustArc must be whitelisted by domain – **not IP** – since the IP is variable. Please whitelist these domains:

- trustarc.com
- prefmgr-cookie.truste-svc.net

! IMPORTANT: Be aware that if TrustArc is not whitelisted, then it cannot present the required page to obtain the user's permission to accept cookies. That means that if a user's geolocation is France, Germany, or the Netherlands, the user may not be able to access concursolutions.com.

BUSINESS PURPOSE/CLIENT BENEFIT

Whitelisting ensures that TrustArc has the proper access to manage consent regulations on behalf of SAP Concur.

Configuration/Feature Activation

There are no configuration steps except to ensure that TrustArc is whitelisted for your organization.

Change Log

Now Logging When a Delegate is Assigned

Overview

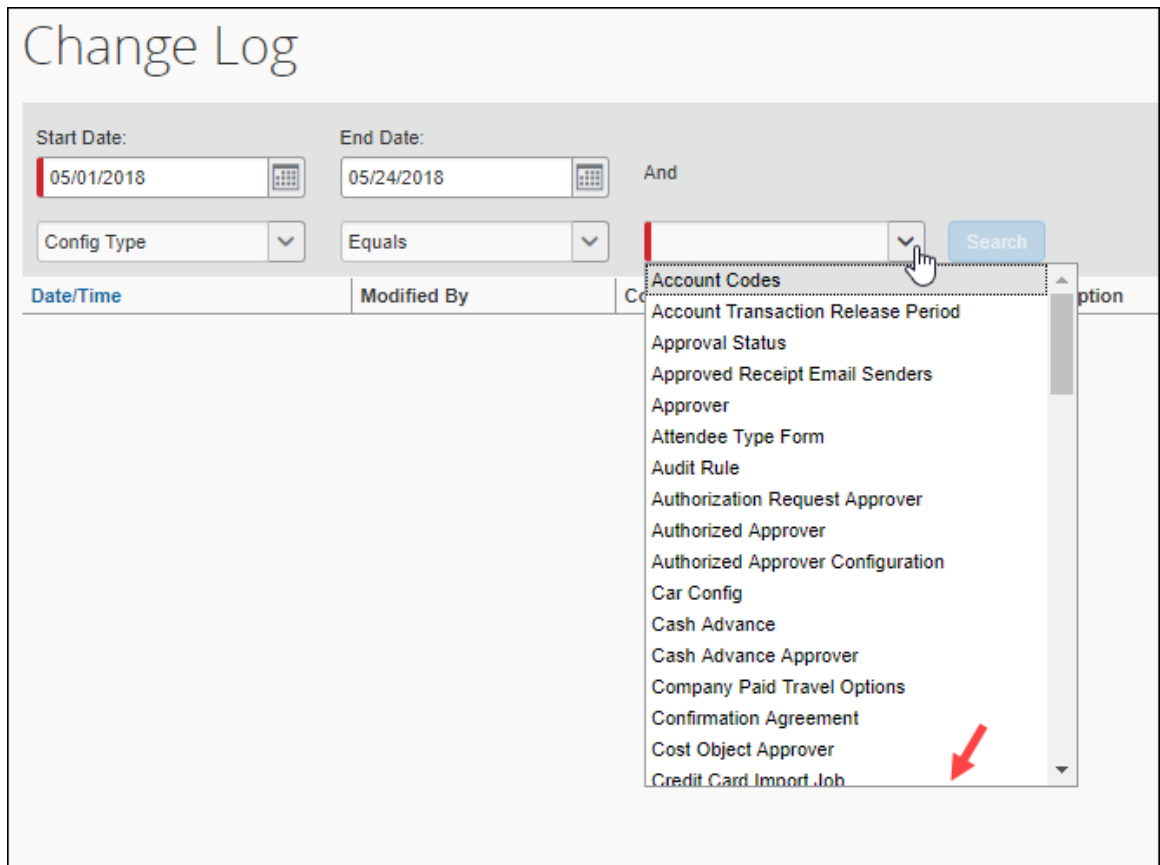
When a user adds a delegate, the act of adding will leave an audit trail. The steps for adding a delegate are unchanged and this change includes delegates that are added using the user interface, a flat file import, or an Excel import. This change is only for adding delegates, not for removing them.

BUSINESS PURPOSE/CLIENT BENEFIT

This change enhances audit capabilities.

What the Admin Sees

The **Change Log** page displays a new list item, *Employee Delegation*.



Configuration/Feature Activation

The change is automatically available; there are no additional configuration or activation steps.

Company Cards

AirPlus CDF3 Lodge - Transaction Identifier Mapping

Overview

With this release, the unique identifier (`_TransId`) of an AirPlus Lodge transaction will be mapped to `FinancialTransaction_5000/AcquirerReferenceData` instead of `FinancialTransaction_5000/MasterCardFinancialTransactionId`.

This update, made at the request of AirPlus, will allow customers to automatically clear the credit card account based on the provided AirPlus Document Number (`AcquirerReferenceData`). Note that the `MasterCardFinancialTransactionId` value will

continue to be used for Lodge transactions coming from MasterCard, and for Corporate Cards, including those coming from AirPlus.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides flexibility when working with the AirPlus card account.

Configuration / Feature Activation

The change occurs automatically and applies to customers using the AirPlus CDF v.3 Lodge integration; there are no additional configuration or activation steps on Concur side. However, customers might need to adapt their financial system to support the automatic clearing of the card account.

Diners Australia: Support for Copy Down of GST Supply Indicator into a Custom Field

Overview

With this release, any value detected in the **GST Supply Indicator** field (at position 779) of the Diner's Club data feed importer is now stored by Expense in a transaction-level custom field. This change supports copy down from the card transaction to an expense entry field where it is visible to the user for further processing.

Prior to this change, this value in the Diner's Club data feed importer was ignored by Concur on the integration side.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement brings the Diner's Club data feed importer to parity with other importers that perform the same function. Additionally, this functionality allows customers to require only a receipt on verification of tax requirements.

Configuration / Feature Activation

The client should confer with a Technical Consultant to have the **Credit Card Entry Mapping** site setting configured for this behavior.

The value can be interpreted this way

- P = (GST Payable) GST verified (receipt not required)
- M = (Mixed Supply) GST verified (receipt not required)
- F = (GST Free) GST NOT verified (receipt required)
- Blank = Companion Card

Currency Admin – Postponed

(Venezuela) New Currency Supported: Bolívar Soberano VES

Overview

The new currency, Bolívar Soberano (VES), is currently available in Concur; however, the ISO 4217 AMENDMENT NUMBER 166 announcing the new currency has now been superseded by ISO 4217 AMENDMENT NUMBER 167 which postpones the redenomination of the currency for an indefinite amount of time.

SAP Concur will provide an update to remove the new currency in the near future.

Expense Pay – Global

(United States) Additional Card Program Now Supported for USD

Overview

Expense Pay – Global for Expense now supports the following credit card program for the United States Dollar (USD \$):

- Silicon Valley Bank MasterCard USD

BUSINESS PURPOSE / CLIENT BENEFIT

This additional option can expedite the processing of credit card expenses.

What the Admin Sees

These additional card program is available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

Add New Card Program [X]

Program Name

Payment Type

Program Type:
 [Verify IIN](#)

Currency

Active

☐ Classic ☐ Global

Configuration/Feature Activation

Concur automatically implemented this change; there are no configuration or activation steps.

Japan Public Transport (JPT)**Jorudan Maintenance****Overview**

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE / CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration / Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

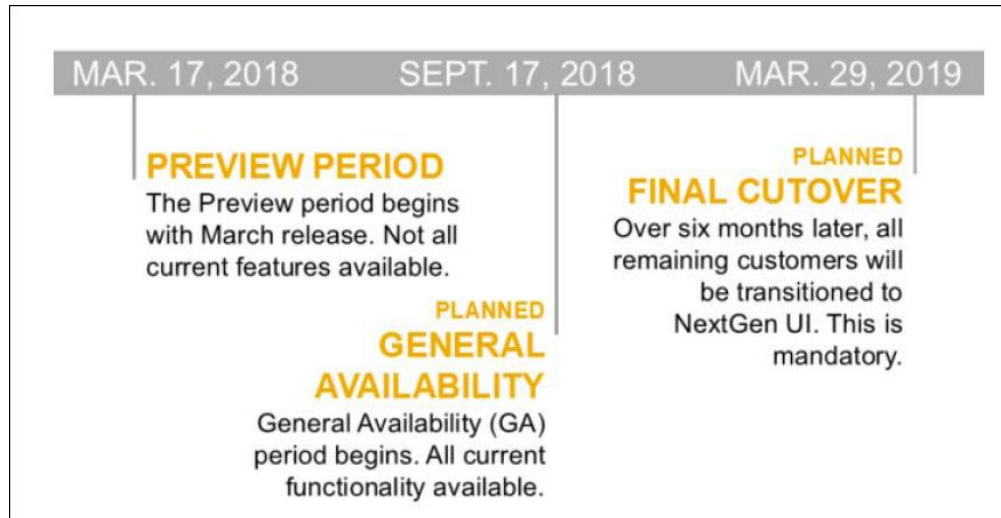
****Ongoing** New User Interface for Concur Expense End Users**

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.



BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

SAP Concur's Platform

Callout Server Requirements Update

Overview

SAP Concur is upgrading the servers that support the SAP Concur Platform Callouts. This maintenance includes the Production Proxy Migration (North America Data Center only) and PWS Server Migration to VM (EMEA And North American Data Centers only). The PWS Server Migration to VM was completed on May 2, 2018. The Production Proxy Migration began on May 9, 2018, and will be completed in a future release.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.
- Clients who whitelist access for Concur callout traffic from the North America Data Center (not common) may need to update their access control list (ACL) to IP 12.129.29.86.

! IMPORTANT: If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur is automatically implementing these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expenses Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

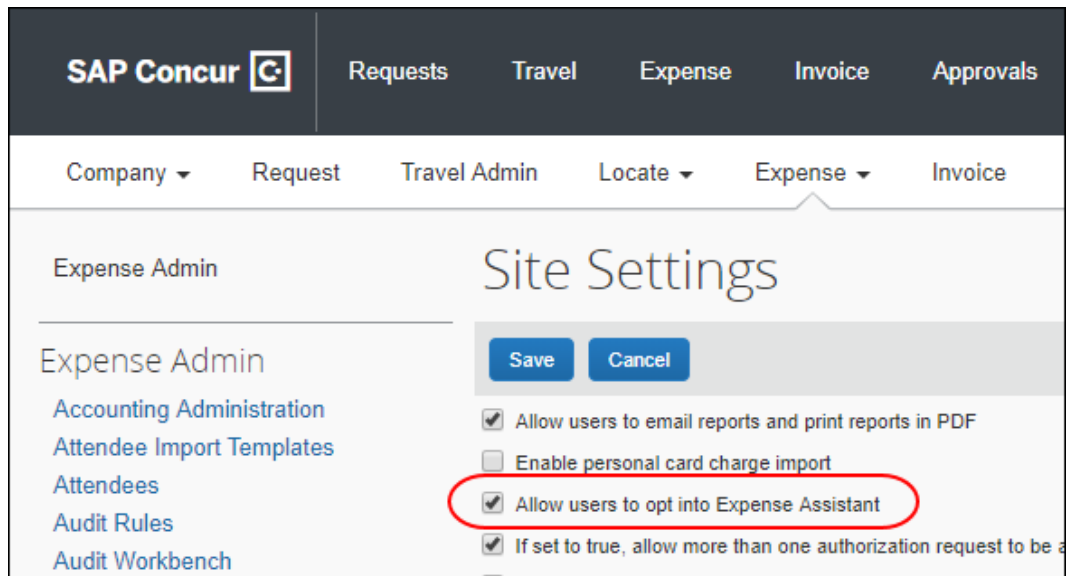
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration/Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

! IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

****Planned Changes** Personalized Concur Open**

Concur Open is the SAP Concur real-time service status dashboard, which displays outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

In a future release, there will be new functionality added to Concur Open. Users will continue to access Concur Open and view Concur service availability. However, in addition, SAP Concur users will be able to log in to Concur Open and:

- View service status for the services and the data center specific to their company
- Access subscription options for updates about the incidents that impact the services specific to their company
- View service history for the past two years, including detailed root cause analysis information and the actions taken by SAP Concur for each incident

BUSINESS PURPOSE/CLIENT BENEFIT

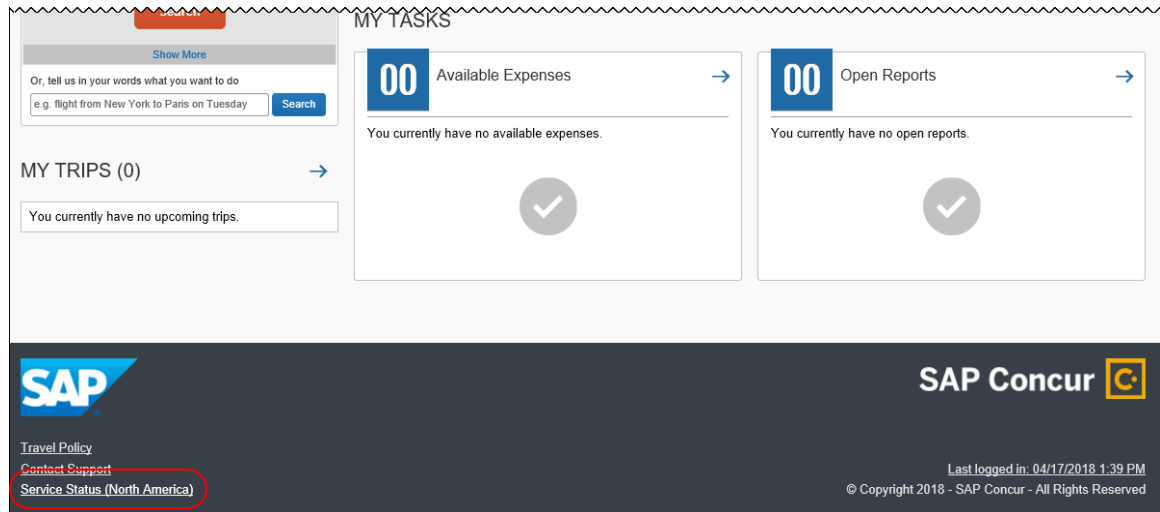
Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding this new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

Users can access Concur Open two ways:

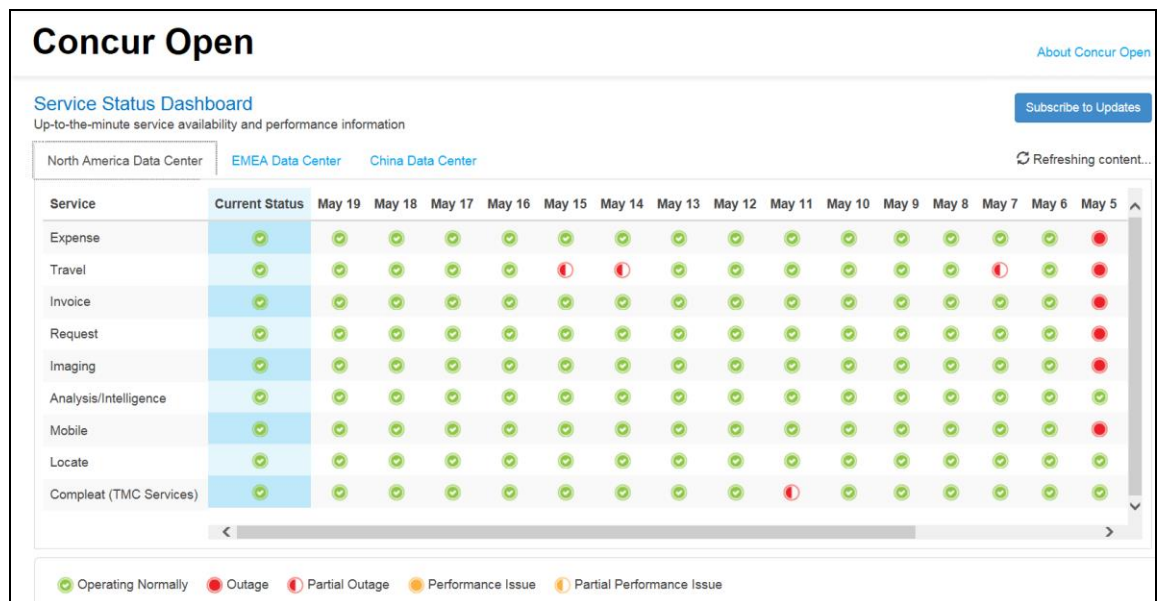
- Enter the public site directly using <https://open.concur.com>
– or –

- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



Concur Open appears.

What the User Sees – Current View



The user sees the data center tabs, the service activity (up to the previous 20 days), the legend (bottom of the page), and the **Subscribe to Updates** button (upper-right corner). The user can click **Subscribe to Updates** to request notifications for service and incident changes.

What the User Sees – New View and Process

The user will access Concur Open the same way they do now – either via the public site (open.concur.com) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.

Concur Open [Subscribe to Updates](#) [Go to Your Service Status Dashboard](#)

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center [EMEA Data Center](#) [China Data Center](#) Mon Mar 05 2018 12:43:27 GMT-0800 (Pacific Standard Time)

Service	Current Status	Mar 5	Mar 4	Mar 3	Mar 2	Mar 1	Feb 28	Feb 27	Feb 26	Feb 25	Feb 24
Expense											
Travel											
Invoice											
Request											
Imaging											
Analysis/Intelligence											
Mobile											

Operating Normally
 Outage
 Partial Outage
 Performance Issue
 Partial Performance Issue

Just like before, the user can see all data centers and services and can use the **Subscribe to Updates** button. In fact, that will not change – anyone can access the public version (open.concur.com) and anyone can request notifications.

NOTE: The ability for non-customers to request notifications will likely be eliminated in the future.

With the release of Personalized Concur Open, the main change is that the **Go to Your Service Status Dashboard** button also appears on the main page. Whether the user accesses Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

- For customers that do not use SSO, users sign in with their SAP Concur username and password.
- For customers that do use SSO, users can access the personalized view using their email address (described below).

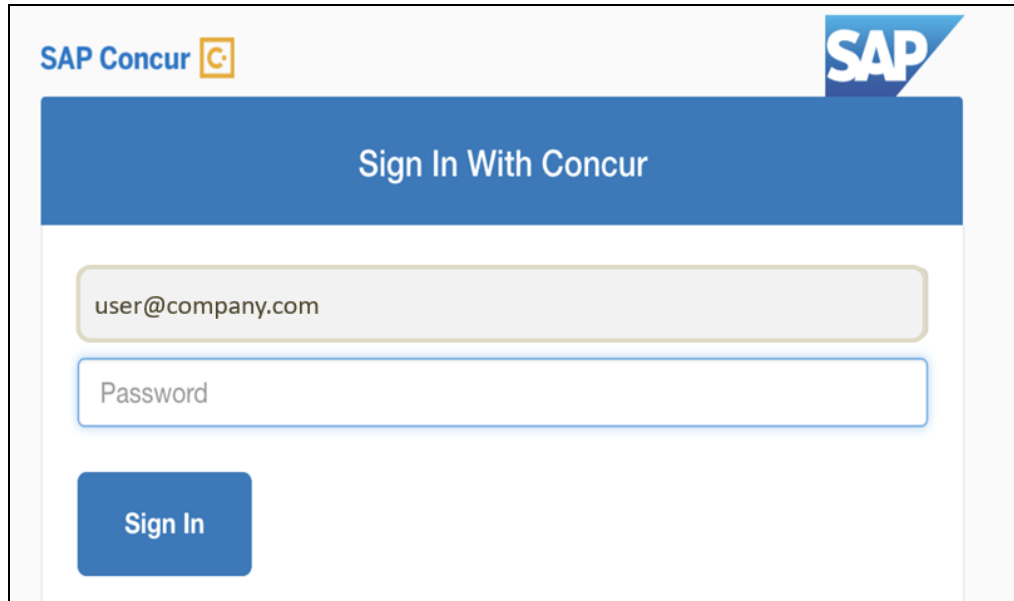
On the main page, the user clicks the **Go to Your Service Status Dashboard** button. The **Sign In With Concur** page appears.

Click to expand the list.'"/>

Then, depending on the customer's implementation of SAP Concur:

- **Username and password:** If the user signs in to SAP Concur using username and password:

Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**. This page appears.



The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

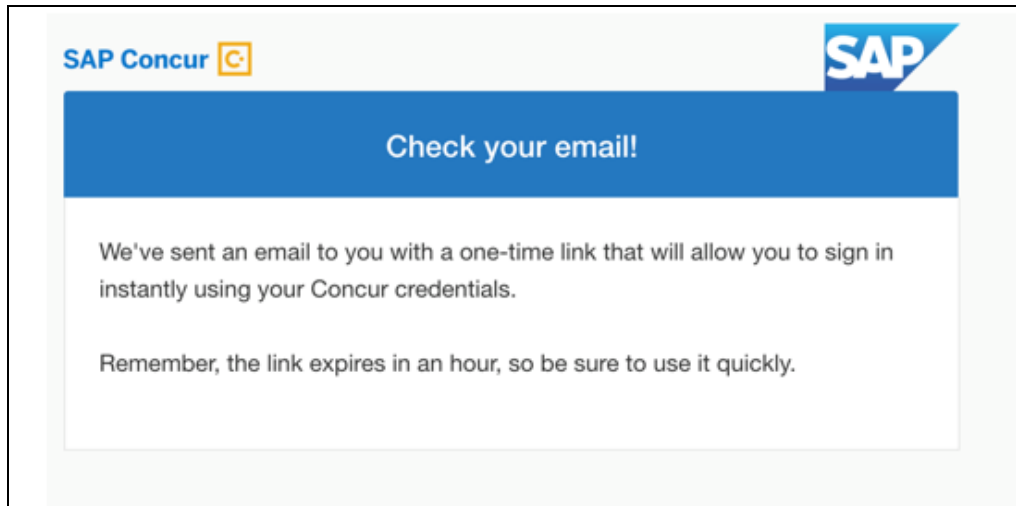
- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:

Click to expand the list.'" data-bbox="260 517 881 836"/>

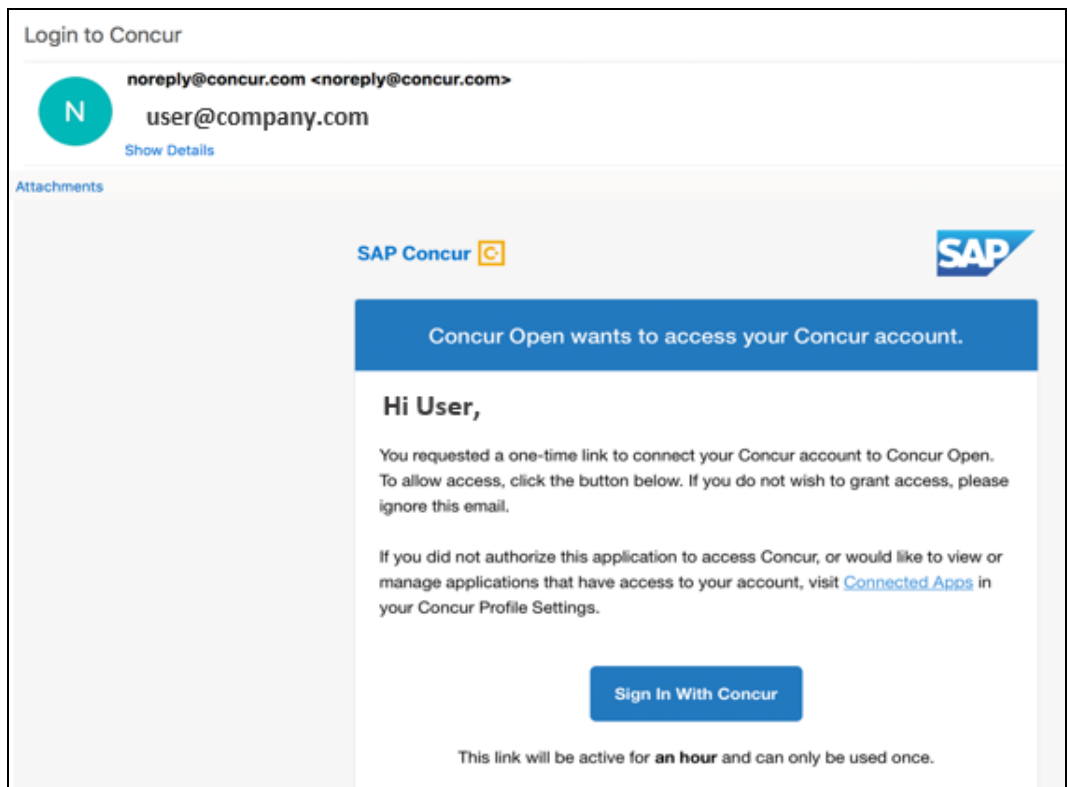
Then, on this page, the user enters their email address (see below), clicks **Send a link to my email**, and clicks **Continue**.

! **IMPORTANT:** SAP Concur compares the email address entered by the user to the email address(es) in the user's SAP Concur profile. (This is not restricted to the **Email 1** field; this includes all email addresses in the **Email Addresses** section in the user's profile.) If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

This message appears:



An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. Personalized Concur Open appears.

NOTE: The one-time link is active for one hour. If the user closes the browser and if the user wants to return to the personalized view, the user must request another one-time link.

Once signed in, the personalized **Service Status Dashboard** page appears.

SAP Concur

Concur Open for <Company Name>

[Subscribe to Updates](#)

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center

Mon Mar 05 2018 12:43:27 GMT-0800 (Pacific Standard Time)

Service	Current Status	Mar 5	Mar 4	Mar 3	Mar 2	Mar 1	Feb 28	Feb 27	Feb 26	Feb 25	Feb 24
Expense	✓	✓	✓	✓	✓	⚠	✓	✓	✓	✓	✓
Travel	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Imaging	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Analysis/Intelligence	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mobile	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

✓ Operating Normally ⚠ Outage ⚠ Partial Outage ⚠ Performance Issue ⚠ Partial Performance Issue

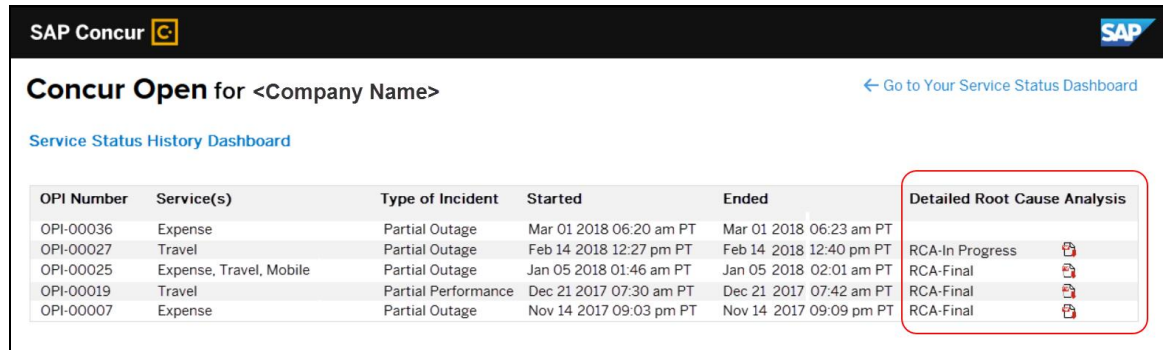
[View Service Status History](#)

On this page, the user can:

- View:
 - ♦ **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes **only** those that the user's company uses.
 - ♦ **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company. The accuracy of determining this is not perfect, so it is possible that a customer may be shown an incident that did not actually affect them.
- Subscribe to updates

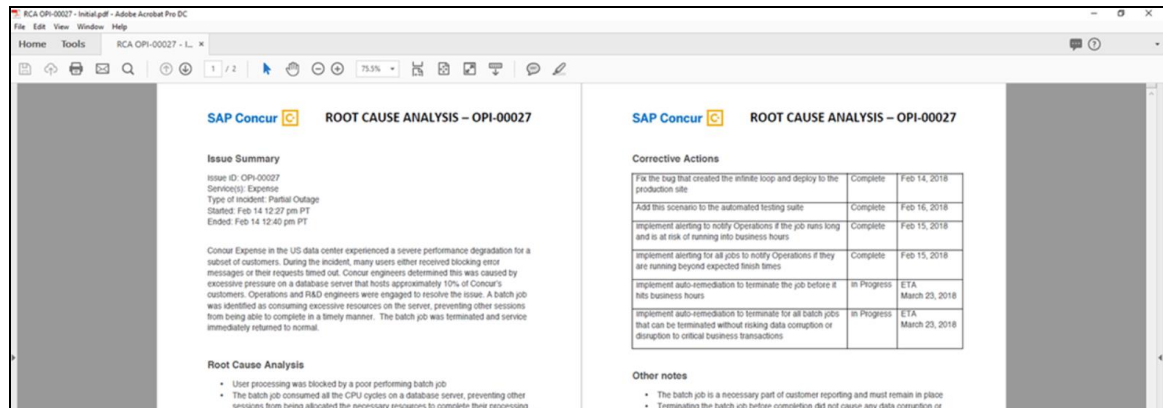
VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



OPI Number	Service(s)	Type of Incident	Started	Ended	Detailed Root Cause Analysis
OPI-00036	Expense	Partial Outage	Mar 01 2018 06:20 am PT	Mar 01 2018 06:23 am PT	RCA-In Progress 
OPI-00027	Travel	Partial Outage	Feb 14 2018 12:27 pm PT	Feb 14 2018 12:40 pm PT	RCA-Final 
OPI-00025	Expense, Travel, Mobile	Partial Outage	Jan 05 2018 01:46 am PT	Jan 05 2018 02:01 am PT	RCA-Final 
OPI-00019	Travel	Partial Performance	Dec 21 2017 07:30 am PT	Dec 21 2017 07:42 am PT	RCA-Final 
OPI-00007	Expense	Partial Outage	Nov 14 2017 09:03 pm PT	Nov 14 2017 09:09 pm PT	RCA-Final 

The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for each incident.

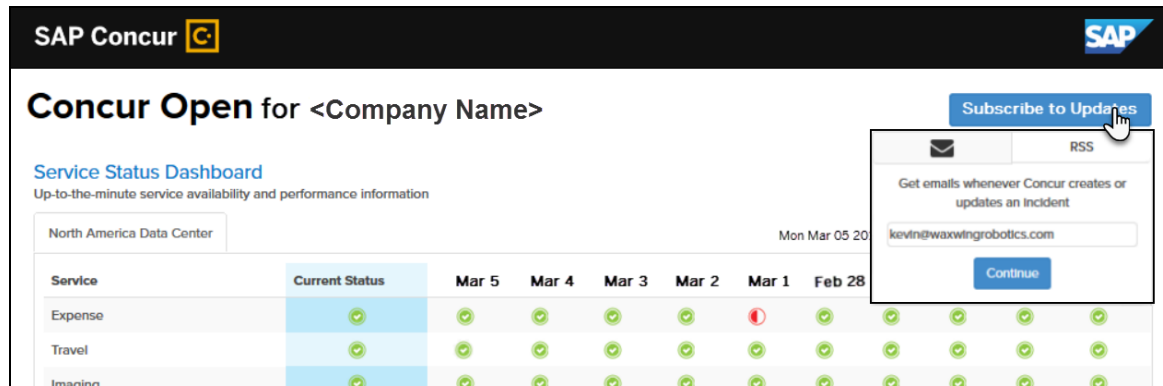


ROOT CAUSE ANALYSIS – OPI-00027																							
Issue Summary Issue ID: OPI-00027 Service(s): Expense Type of incident: Partial Outage Started: Feb 14 12:27 pm PT Ended: Feb 14 12:40 pm PT Concur Expense in the US data center experienced a severe performance degradation for a subset of customers. During the incident, many users either received blocking error messages or their requests timed out. Concur engineers determined this was caused by excessive pressure on a database server that hosts approximately 10% of Concur's customers. Operations and R&D engineers were engaged to resolve the issue. A batch job was identified as consuming excessive resources on the server, preventing other sessions from being able to complete in a timely manner. The batch job was terminated and service immediately returned to normal.																							
Root Cause Analysis - User processing was blocked by a poor performing batch job - The batch job consumed all the CPU cycles on a database server, preventing other sessions from being allocated the necessary resources to complete their processing																							
Corrective Actions <table border="1"> <thead> <tr> <th>Action</th> <th>Status</th> <th>ETA</th> </tr> </thead> <tbody> <tr> <td>Fix the bug that created the infinite loop and deploy to the production site</td> <td>Complete</td> <td>Feb 14, 2018</td> </tr> <tr> <td>Add this scenario to the automated testing suite</td> <td>Complete</td> <td>Feb 16, 2018</td> </tr> <tr> <td>Implement alerting to notify Operations if the job runs long and is at risk of running into business hours</td> <td>Complete</td> <td>Feb 15, 2018</td> </tr> <tr> <td>Implement alerting for all jobs to notify Operations if they are running beyond expected finish times</td> <td>Complete</td> <td>Feb 15, 2018</td> </tr> <tr> <td>Implement auto-remediation to terminate the job before it hits business hours</td> <td>In Progress</td> <td>ETA March 23, 2018</td> </tr> <tr> <td>Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions</td> <td>In Progress</td> <td>ETA March 23, 2018</td> </tr> </tbody> </table>			Action	Status	ETA	Fix the bug that created the infinite loop and deploy to the production site	Complete	Feb 14, 2018	Add this scenario to the automated testing suite	Complete	Feb 16, 2018	Implement alerting to notify Operations if the job runs long and is at risk of running into business hours	Complete	Feb 15, 2018	Implement alerting for all jobs to notify Operations if they are running beyond expected finish times	Complete	Feb 15, 2018	Implement auto-remediation to terminate the job before it hits business hours	In Progress	ETA March 23, 2018	Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions	In Progress	ETA March 23, 2018
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Implement auto-remediation to terminate the job before it hits business hours	In Progress	ETA March 23, 2018																					
Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions	In Progress	ETA March 23, 2018																					
Other notes - The batch job is a necessary part of customer reporting and must remain in place - Terminating the batch job before completion did not cause any data corruption or																							

The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

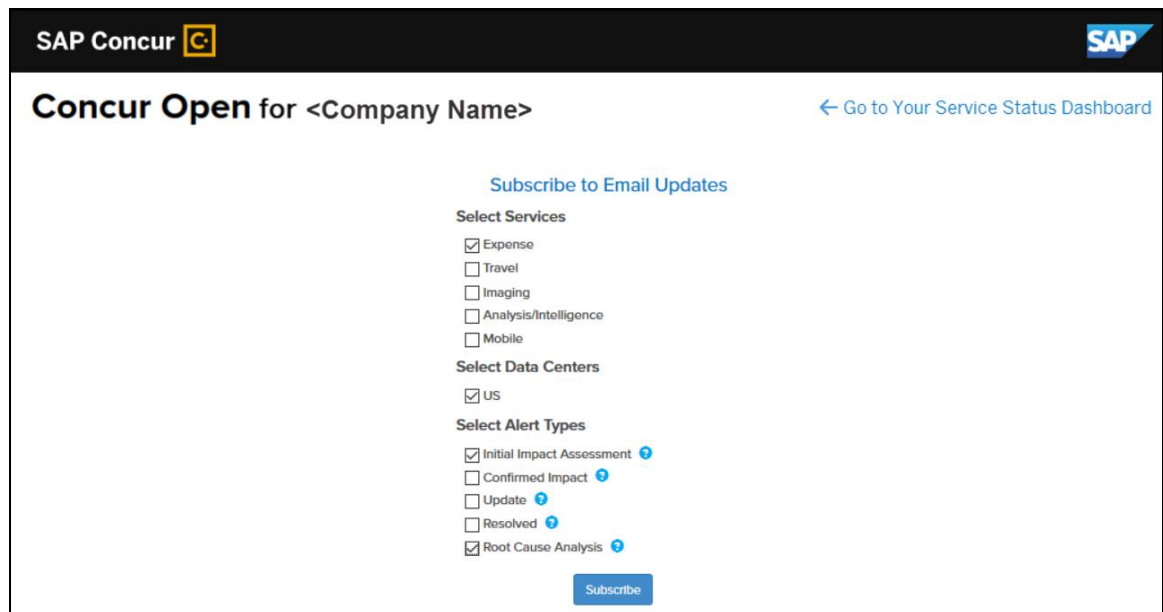
SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.

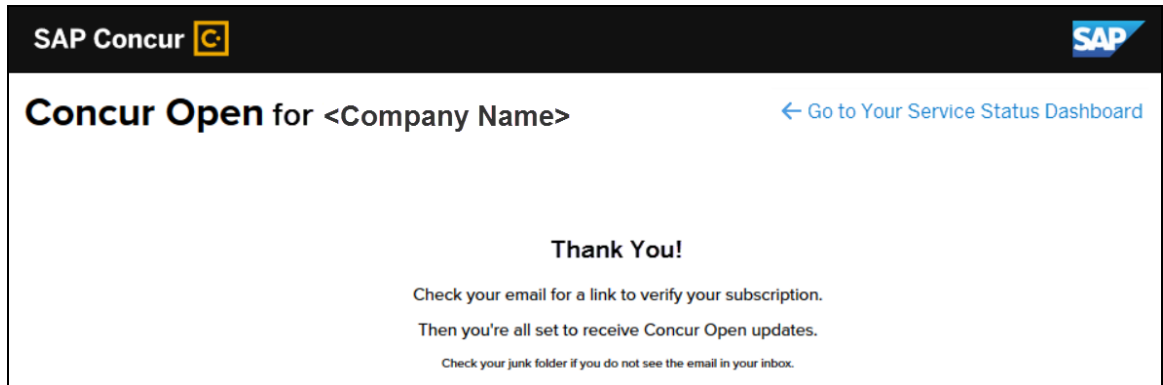


To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address. The user can enter only one email address. It can be their email address associated with their Concur profile, their personal email address, or any other email address.

The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

Note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
 - ♦ Set the user's new subscription to match the company's services and data center
 - ♦ Notify the user of the change

NOTE: Best practice – after the new view is available – is to sign in to the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user subscription will remain the same (not personalized).

Configuration/Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

! IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

Expense Setup Guides

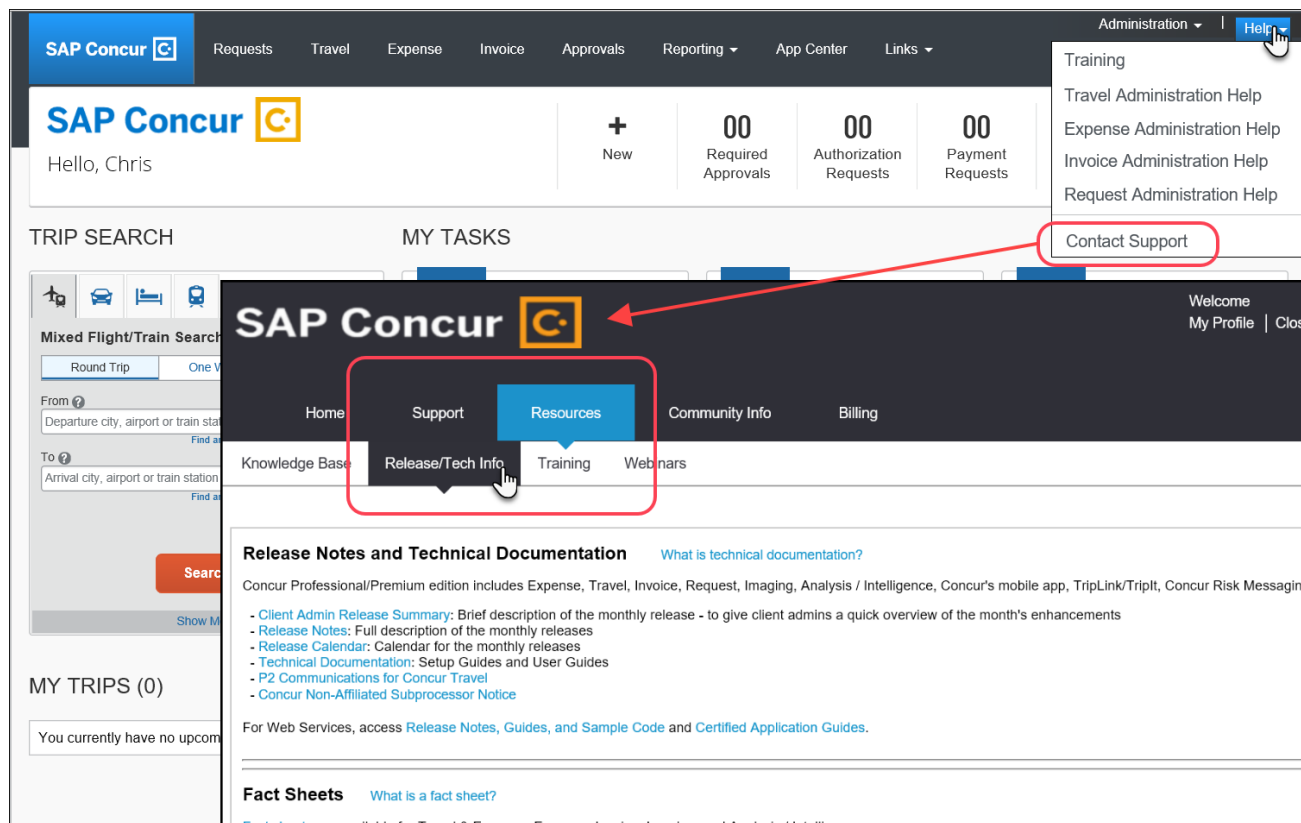
Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

Additional Release Notes and Other Technical Documentation: Concur Support Portal – Selected Users

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



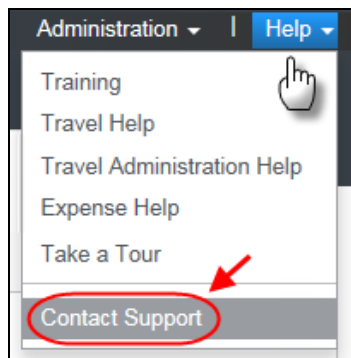
Cases

Steps for Getting a Status

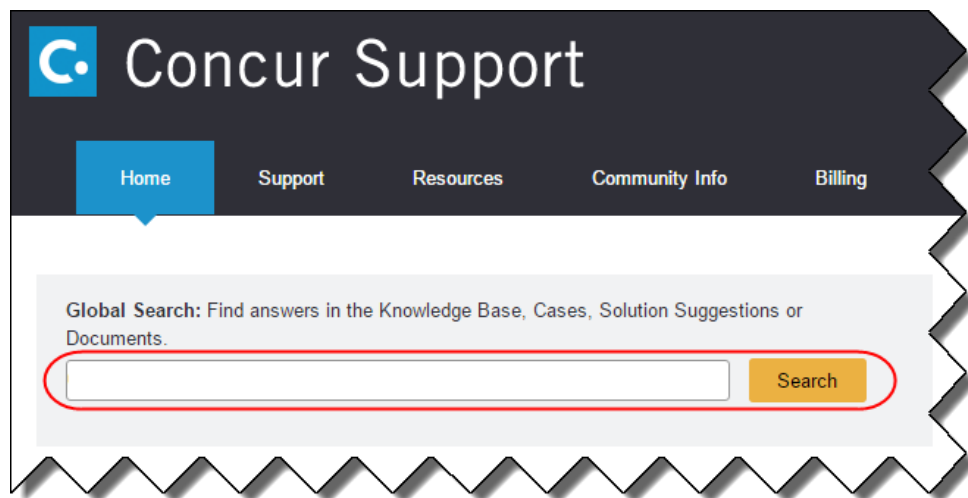
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

June Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: June 16, 2018 Update #1: Monday, June 25, 1:00 PM PT	Client FINAL

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Release Notes

Admin

End of TLS 1.0 Email – Targeted for Wednesday, June 27, 2018

In 2017, SAP Concur announced that it was ending support for version 1.0 of the TLS encryption protocol.

Be aware that – targeted for Wednesday June 27, 2018 – SAP Concur will disable the ability to accept incoming email **via TLS 1.0 connectivity** for plans@concurtravel.com and plans@tripit.com.

There should be very little customer impact since the vast majority of customers have already disabled the ability to send email via TLS 1.0.

Configuration / Feature Activation

This change will occur automatically; there are no additional configuration or activation steps.

****Reminder** New Cookie Consent Process**

Overview

Europe has very specific user-consent requirements for cookies. There are two types of consent when allowing cookies to be saved on the user's computer. As described on the following pages, each country decides which option to use. The options are:

- **Active consent:** The user actively agrees to allow cookies. In this case, SAP Concur is required to obtain user consent before saving any cookies on a user's computer.
- **Passive consent:** The user does not disallow cookies.

Each country decides which option it wants to use.

IMPORTANT

This release note discusses consent for and modification of cookies. Note the following:

- TrustArc, a global privacy and data governance provider, manages the cookie preference choice of each user for SAP Concur. Several consent options are described on the following pages.
 - ◆ Be aware the TrustArc provides all consent text and manages all translations of the consent text. Neither SAP Concur nor its customers can affect the text or translation in any way.

- ◆ Consent regulations differ by country. TrustArc determines the consent option that is appropriate for each user, based on each country's regulations. SAP Concur cannot affect that determination in any way nor does SAP Concur have a list of countries and their consent regulations.
- Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.
- SAP Concur uses geolocation – based on the user's IP address – to identify the user's location (country), which determines if user consent is active or passive. Be aware that if the user is using VPN, then geolocation will likely identify the user's country as the country associated with the VPN.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. **There is no option for companies to make these choices for their users.**
- Once a user has actively accepted cookies, they cannot modify their cookies options to stop accepting cookies except to remove all cookies and start over.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

As noted above, each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

ACTIVE CONSENT REQUIRED

If active consent is required – before the user can access any SAP Concur page – the user sees the **About cookies on this site** window.

About cookies on this site



Cookies are important to the proper functioning of a site. To improve your experience, we use cookies to remember log-in details and provide secure log-in, collect statistics to optimize site functionality, and deliver content tailored to your interests. Click Agree and Proceed to accept cookies and go directly to the site or click on View Cookie Settings to see detailed descriptions of the types of cookies and choose whether to accept certain cookies while on the site.

[Agree and Proceed](#)
[View Cookie Settings »](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by:  TRUSTe

The user can:

- Read the agreement text and then click **Agree and Proceed**; the user is then directed into SAP Concur.
– **or** –
- Click **View Cookie Settings** to see other options.

NOTE: The user cannot bypass this page. If the user chooses to **not** accept cookies, the user cannot access SAP Concur.

If the user clicks **View Cookie Settings**, this page appears.

About cookies on this site SAP Concur

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

— — **REQUIRED COOKIES**
These cookies are required to enable core site functionality.

— — **FUNCTIONAL COOKIES**
These cookies allow us to analyze site usage so we can measure and improve performance.

— ☒ — **ADVERTISING COOKIES**
These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#) [Submit Preferences](#) [Advanced Settings](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by: [TrustArc](#) | TRUSTe

On this page, the user can slide the bar on the left to accept:

- **Required cookies:** Those required to use SAP Concur services.
- **Required and functional cookies:** Required cookies *plus* those used for performance and usage analysis.
- **Required, functional, and advertising cookies:** Required cookies *plus* functional cookies *plus* cookies used for advertisements.

The user can:

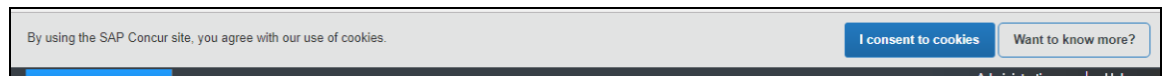
- Click **Cancel** and return to the previous page.
– *or* –
- Slide the bar to make their choice and then click **Submit Preferences**.
– *or* –
- Click **Advanced Settings**.

If the user clicks **Advanced Settings**, they will see a read-only view of the existing cookies.

Once the user consents, the requirement is satisfied and the consent message does not appear again.

PASSIVE CONSENT

In some countries, once the user has accessed SAP Concur, a banner similar to the one below appears at the top of the SAP Concur page.



Whether or not the user actively consents, consent is implied. The user can continue to work in SAP Concur and the banner does not interfere with the user's tasks; however, the banner remains until the user clicks **I consent to cookies**.

The user clicks **Want to know more?**, the user sees the cookie options (as described previously).

About cookies on this site

SAP Concur

C

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

REQUIRED COOKIES

These cookies are required to enable core site functionality.

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in

- Remember how far you are through an order

- Remember your log-in details

- Remember what is in your shopping cart

- Make sure the website looks consistent

- Allow you to share pages with social networks

- Allow you to post comments

- Serve ads relevant to your interests

Cancel

Submit Preferences

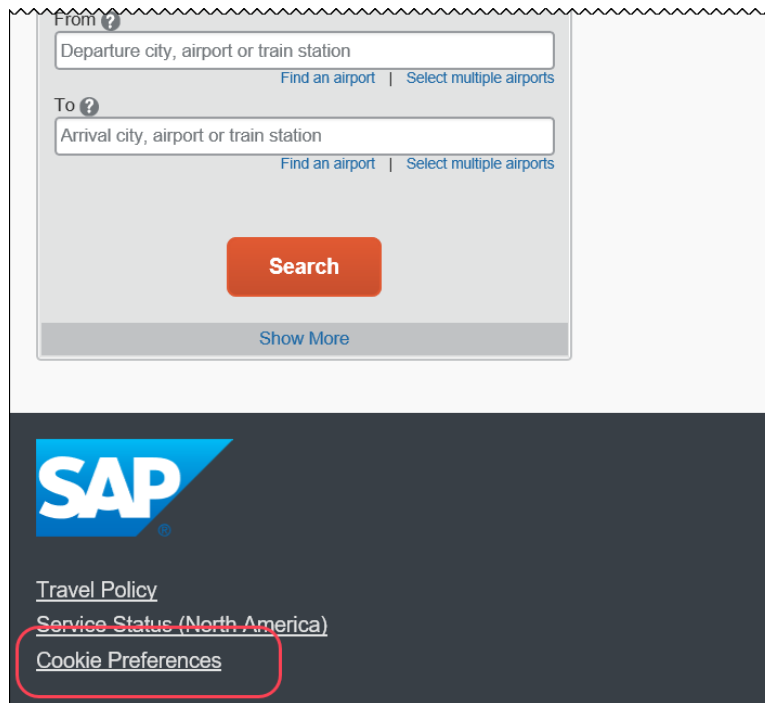
Advanced Settings

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Once the user consents, the requirement is satisfied and the banner does not appear again.

MAKING CHANGES

The **Cookie Preferences** link appears in the SAP Concur footer.



This link allows users to view their existing cookie settings. To modify existing cookie preferences, TrustArc requires that the user clear all existing cookies and then choose a new setting.

! **IMPORTANT:** Not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Cookie Preferences** link there.

Configuration / Feature Activation

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

****Reminder** Whitelist for TrustArc.com**

Overview

The May release notes included an item named *New Cookie Preferences Link in the SAP Concur Footer*. It describes cookie-related process changes that were introduced in the May 12 release because of specific consent regulations in Europe.

To ensure that SAP Concur properly responds to the regulations, SAP Concur has enlisted the assistance of TrustArc, a global privacy and data governance provider.

Please ensure that your organization's IT (or similar) department adds TrustArc to its whitelist, so TrustArc can properly monitor and manage these processes.

TrustArc must be whitelisted by domain – **not IP** – since the IP is variable. Please whitelist these domains:

- trustarc.com
- prefmgr-cookie.truste-svc.net

! IMPORTANT: Be aware that if TrustArc is not whitelisted, then it cannot present the required page to obtain the user's permission to accept cookies. That means that if a user's geolocation is France, Germany, or the Netherlands, the user may not be able to access concursolutions.com.

BUSINESS PURPOSE / CLIENT BENEFIT

Whitelisting ensures that TrustArc has the proper access to manage consent regulations on behalf of SAP Concur.

Configuration / Feature Activation

There are no configuration steps except to ensure that TrustArc is whitelisted for your organization.

Change Log

Now Logging When a Delegate is Assigned

Overview

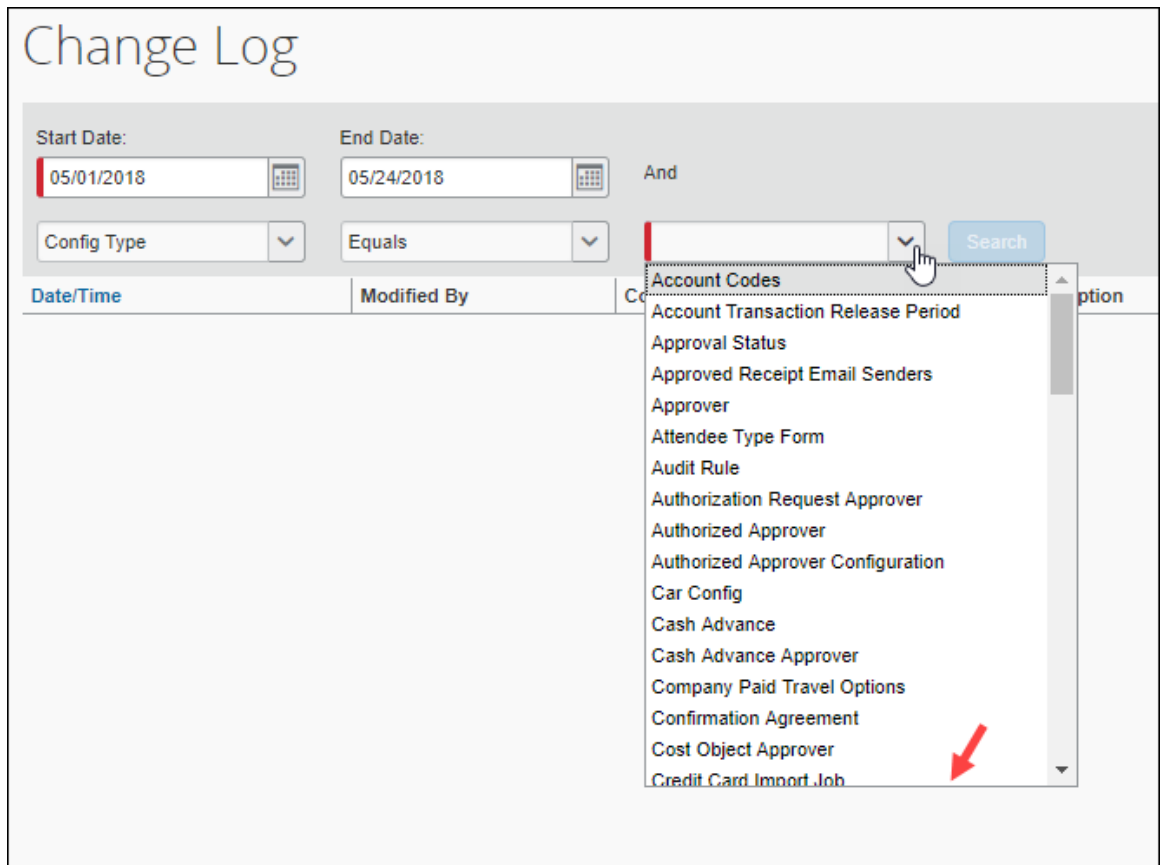
When a user adds a delegate, the act of adding will leave an audit trail. The steps for adding a delegate are unchanged and this change includes delegates that are added using the user interface, a flat file import, or an Excel import. This change is only for adding delegates, not for removing them.

BUSINESS PURPOSE/CLIENT BENEFIT

This change enhances audit capabilities.

What the Admin Sees

The **Change Log** page displays a new list item, *Employee Delegation*.



Configuration / Feature Activation

The change is automatically available; there are no additional configuration or activation steps.

Company Cards

AirPlus CDF3 Lodge - Transaction Identifier Mapping

Overview

With this release, the unique identifier (`_TransId`) of an AirPlus Lodge transaction will be mapped to `FinancialTransaction_5000/AcquirerReferenceData` instead of `FinancialTransaction_5000/MasterCardFinancialTransactionId`.

This update, made at the request of AirPlus, will allow customers to automatically clear the credit card account based on the provided AirPlus Document Number (`AcquirerReferenceData`). Note that the `MasterCardFinancialTransactionId` value will

continue to be used for Lodge transactions coming from MasterCard, and for Corporate Cards, including those coming from AirPlus.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides flexibility when working with the AirPlus card account.

Configuration / Feature Activation

The change occurs automatically and applies to customers using the AirPlus CDF v.3 Lodge integration; there are no additional configuration or activation steps on Concur side. However, customers might need to adapt their financial system to support the automatic clearing of the card account.

Diners Australia: Support for Copy Down of GST Supply Indicator into a Custom Field

Overview

With this release, any value detected in the **GST Supply Indicator** field (at position 779) of the Diner's Club data feed importer is now stored by Expense in a transaction-level custom field. This change supports copy down from the card transaction to an expense entry field where it is visible to the user for further processing.

Prior to this change, this value in the Diner's Club data feed importer was ignored by Concur on the integration side.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement brings the Diner's Club data feed importer to parity with other importers that perform the same function. Additionally, this functionality allows customers to require only a receipt on verification of tax requirements.

Configuration / Feature Activation

The client should confer with a Technical Consultant to have the **Credit Card Entry Mapping** site setting configured for this behavior.

The value can be interpreted this way

- P = (GST Payable) GST verified (receipt not required)
- M = (Mixed Supply) GST verified (receipt not required)
- F = (GST Free) GST NOT verified (receipt required)
- Blank = Companion Card

Currency Admin – Postponed

(Venezuela) New Currency Supported: Bolívar Soberano VES

Overview

The new currency, Bolívar Soberano (VES), is currently available in Concur; however, the ISO 4217 AMENDMENT NUMBER 166 announcing the new currency has now been superseded by ISO 4217 AMENDMENT NUMBER 167 which postpones the redenomination of the currency for an indefinite amount of time.

SAP Concur will provide an update to remove the new currency in the near future.

Expense Pay – Global

(United States) Additional Card Program Now Supported for USD

Overview

Expense Pay – Global for Expense now supports the following credit card program for the United States Dollar (USD \$):

- Silicon Valley Bank MasterCard USD

BUSINESS PURPOSE / CLIENT BENEFIT

This additional option can expedite the processing of credit card expenses.

What the Admin Sees

These additional card program is available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

Add New Card Program [X]

Program Name

Payment Type

Program Type:
 [Verify IIN](#)

Currency

Active

☐ Classic ☐ Global

Configuration / Feature Activation

Concur automatically implemented this change; there are no configuration or activation steps.

Japan Public Transport (JPT)**Jorudan Maintenance****Overview**

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE / CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration / Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

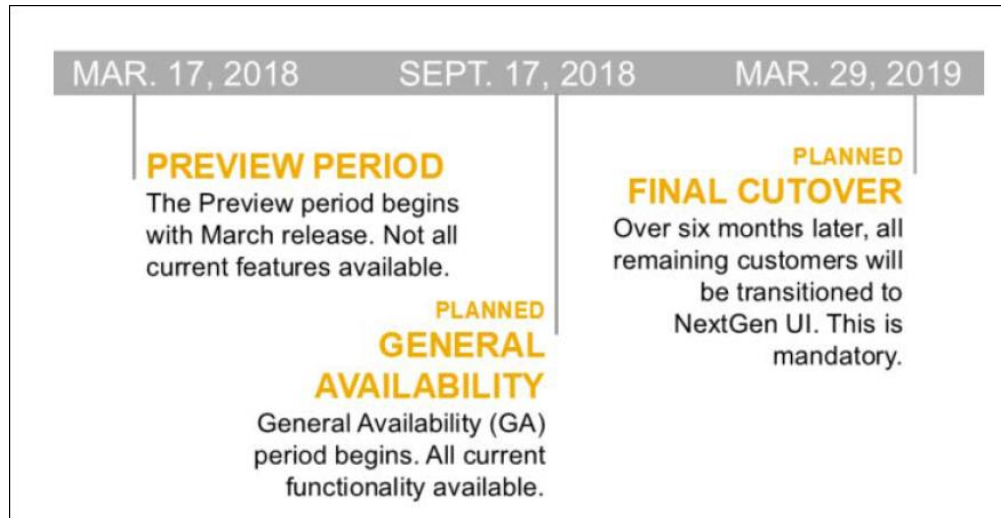
****Ongoing** New User Interface for Concur Expense End Users**

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.



BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

SAP Concur's Platform

Callout Server Requirements Update

Overview

SAP Concur is upgrading the servers that support the SAP Concur Platform Callouts. This maintenance includes the Production Proxy Migration (North America Data Center only) and PWS Server Migration to VM (EMEA And North American Data Centers only). The PWS Server Migration to VM was completed on May 2, 2018. The Production Proxy Migration began on May 9, 2018, and will be completed in a future release.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.
- Clients who whitelist access for Concur callout traffic from the North America Data Center (not common) may need to update their access control list (ACL) to IP 12.129.29.86.

! IMPORTANT: If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE / CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration / Feature Activation

SAP Concur is automatically implementing these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expenses Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

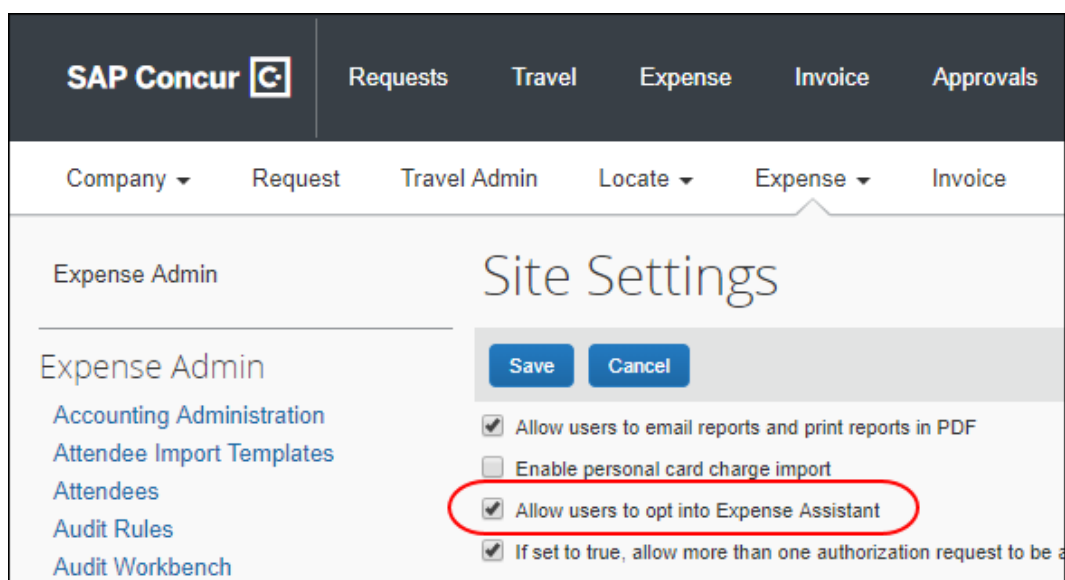
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

! IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

****Planned Changes** Personalized Concur Open**

Concur Open is the SAP Concur real-time service status dashboard, which displays outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

In a future release, there will be new functionality added to Concur Open. Users will continue to access Concur Open and view Concur service availability. However, in addition, SAP Concur users will be able to log in to Concur Open and:

- View service status for the services and the data center specific to their company
- Access subscription options for updates about the incidents that impact the services specific to their company
- View service history for the past two years, including detailed root cause analysis information and the actions taken by SAP Concur for each incident

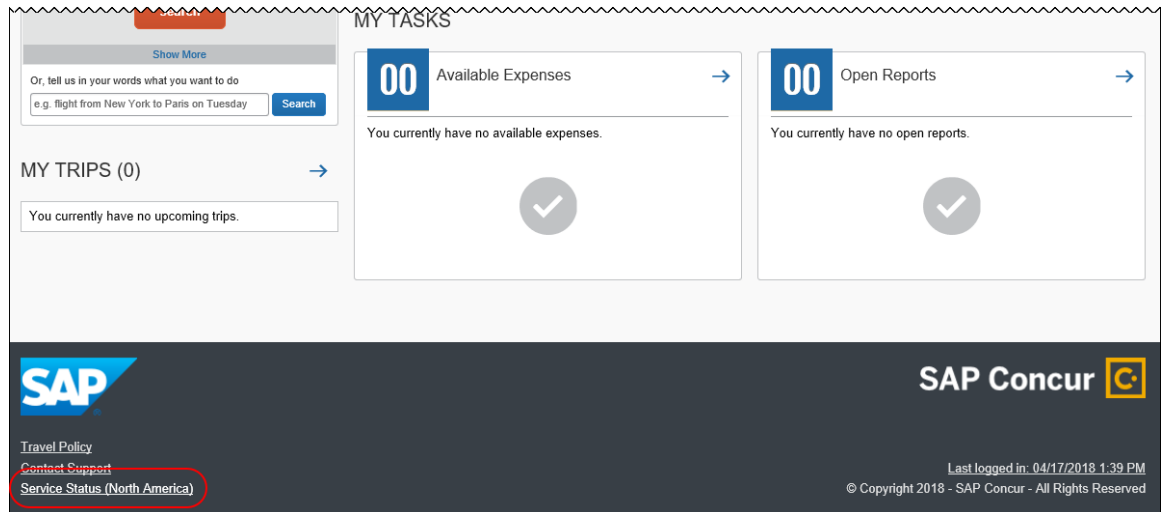
BUSINESS PURPOSE / CLIENT BENEFIT

Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding this new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

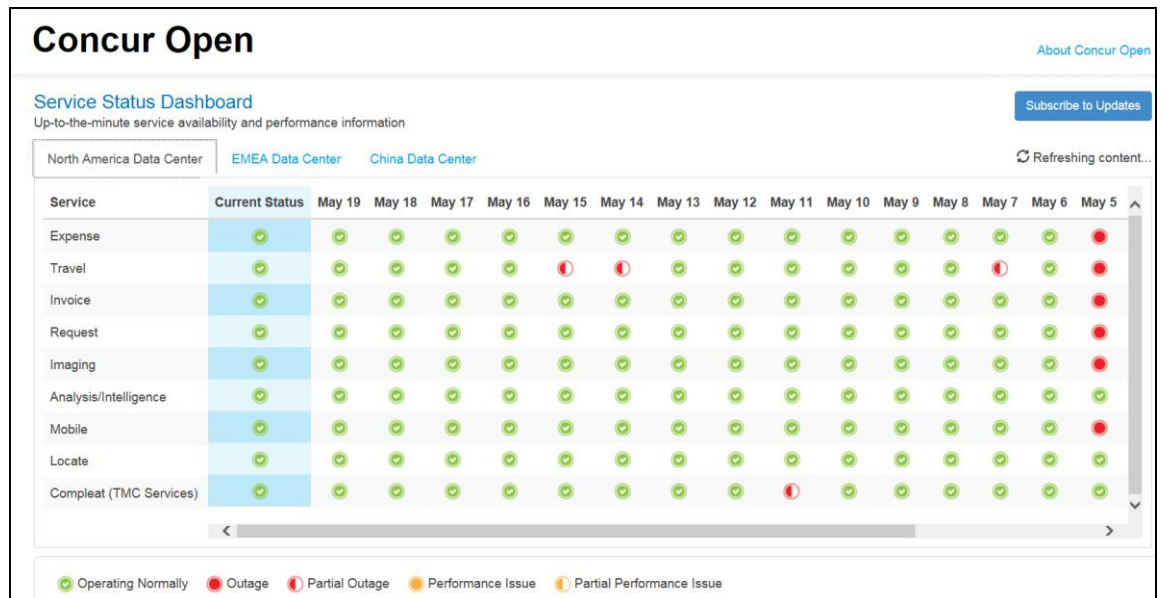
Users can access Concur Open two ways:

- Enter the public site directly using <https://open.concur.com>
– **or** –
- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



Concur Open appears.

What the User Sees – Current View



The user sees the data center tabs, the service activity (up to the previous 20 days), the legend (bottom of the page), and the **Subscribe to Updates** button (upper-

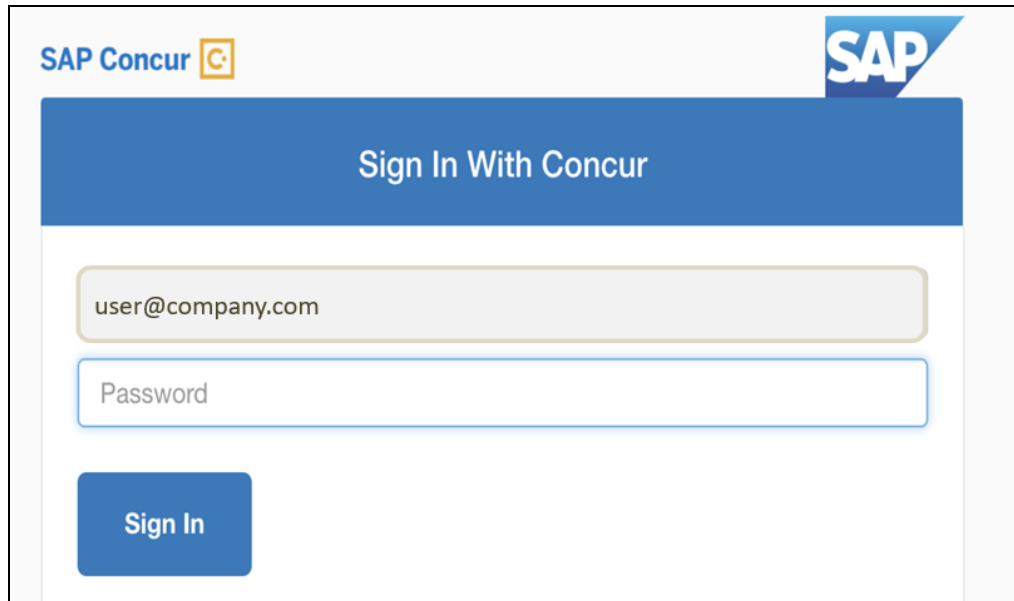
On the main page, the user clicks the **Go to Your Service Status Dashboard** button. The **Sign In With Concur** page appears.

Click to expand the list.'"/>

Then, depending on the customer's implementation of SAP Concur:

- **Username and password:** If the user signs in to SAP Concur using username and password:

Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**. This page appears.



The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

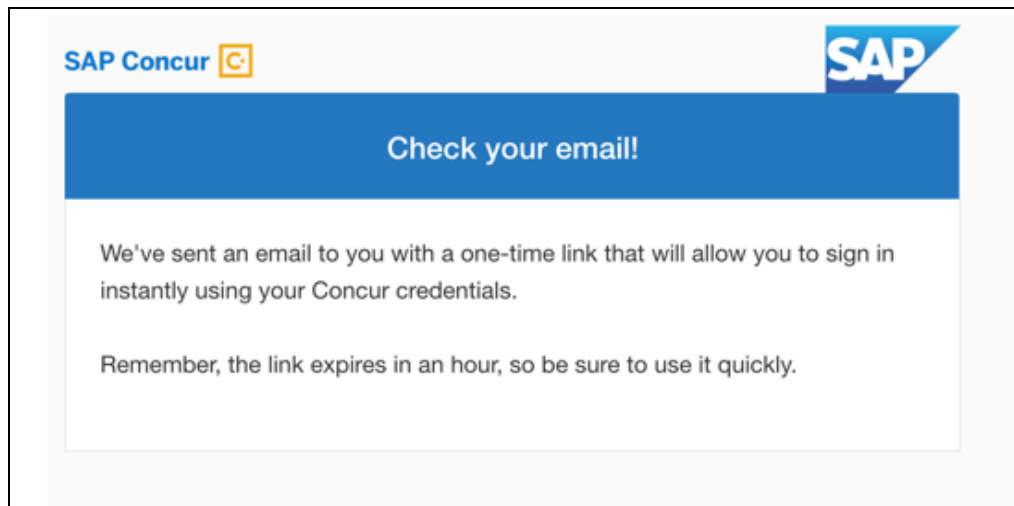
- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:

Click to expand the list.'" data-bbox="260 518 881 836"/>

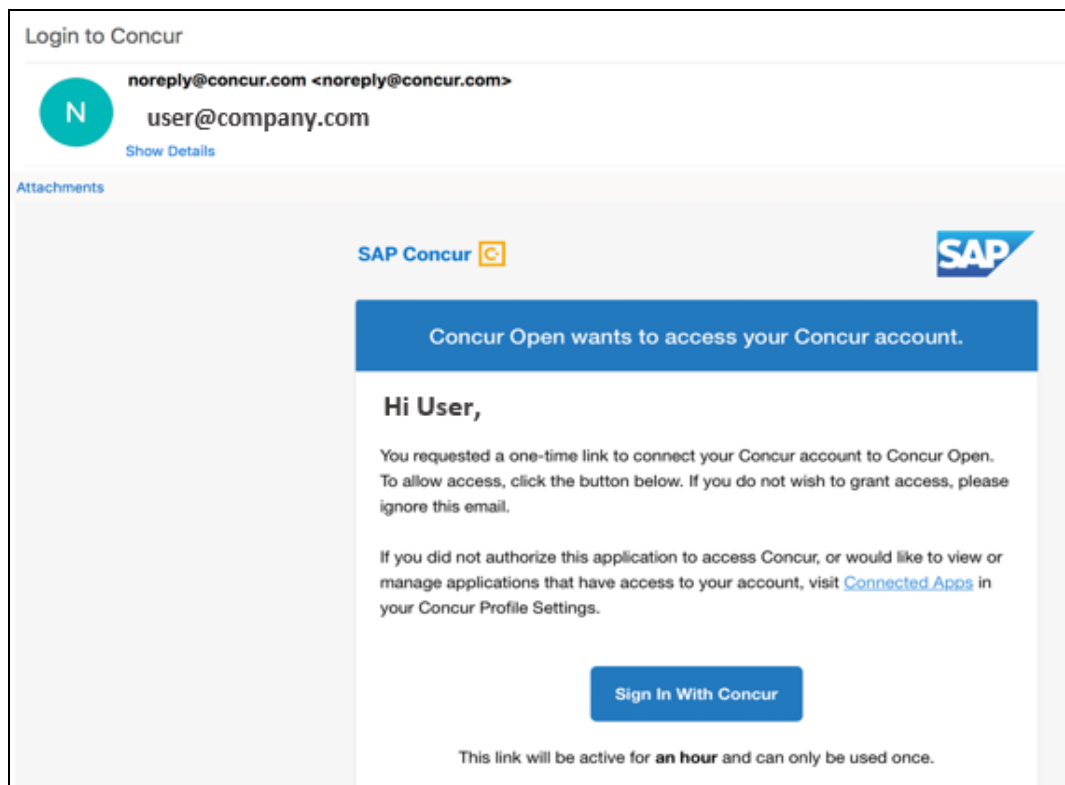
Then, on this page, the user enters their email address (see below), clicks **Send a link to my email**, and clicks **Continue**.

! **IMPORTANT:** SAP Concur compares the email address entered by the user to the email address(es) in the user's SAP Concur profile. (This is not restricted to the **Email 1** field; this includes all email addresses in the **Email Addresses** section in the user's profile.) If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

This message appears:



An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. Personalized Concur Open appears.

NOTE: The one-time link is active for one hour. If the user closes the browser and if the user wants to return to the personalized view, the user must request another one-time link.

Once signed in, the personalized **Service Status Dashboard** page appears.

SAP Concur  

Concur Open for <Company Name> [Subscribe to Updates](#)

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center Mon Mar 05 2018 12:43:27 GMT-0800 (Pacific Standard Time)

Service	Current Status	Mar 5	Mar 4	Mar 3	Mar 2	Mar 1	Feb 28	Feb 27	Feb 26	Feb 25	Feb 24
Expense											
Travel											
Imaging											
Analysis/Intelligence											
Mobile											

Operating Normally
 Outage
 Partial Outage
 Performance Issue
 Partial Performance Issue

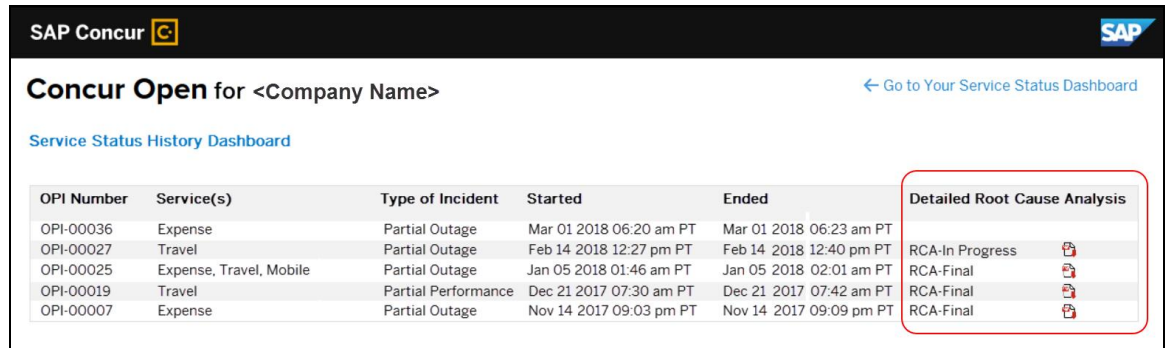
[View Service Status History](#)

On this page, the user can:

- View:
 - ♦ **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes **only** those that the user's company uses.
 - ♦ **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company. The accuracy of determining this is not perfect, so it is possible that a customer may be shown an incident that did not actually affect them.
- Subscribe to updates

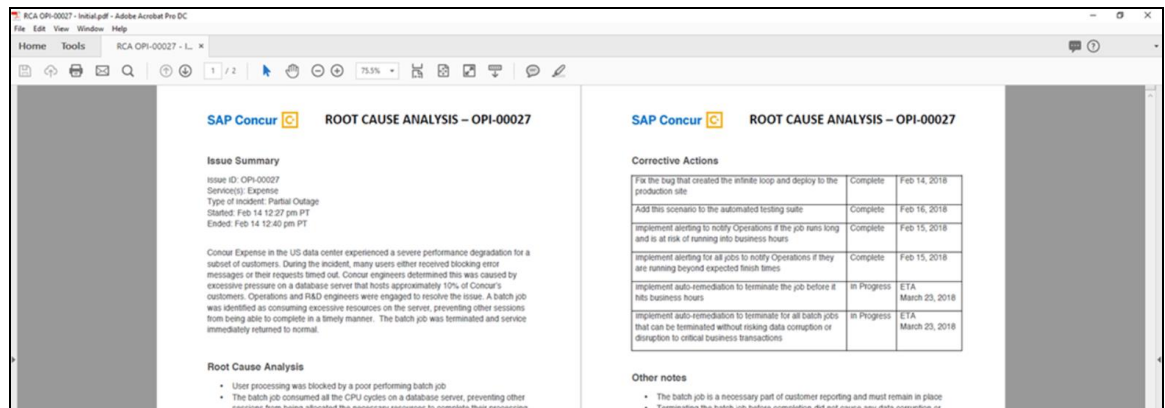
VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



OPI Number	Service(s)	Type of Incident	Started	Ended	Detailed Root Cause Analysis
OPI-00036	Expense	Partial Outage	Mar 01 2018 06:20 am PT	Mar 01 2018 06:23 am PT	RCA-In Progress 
OPI-00027	Travel	Partial Outage	Feb 14 2018 12:27 pm PT	Feb 14 2018 12:40 pm PT	RCA-Final 
OPI-00025	Expense, Travel, Mobile	Partial Outage	Jan 05 2018 01:46 am PT	Jan 05 2018 02:01 am PT	RCA-Final 
OPI-00019	Travel	Partial Performance	Dec 21 2017 07:30 am PT	Dec 21 2017 07:42 am PT	RCA-Final 
OPI-00007	Expense	Partial Outage	Nov 14 2017 09:03 pm PT	Nov 14 2017 09:09 pm PT	RCA-Final 

The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for each incident.

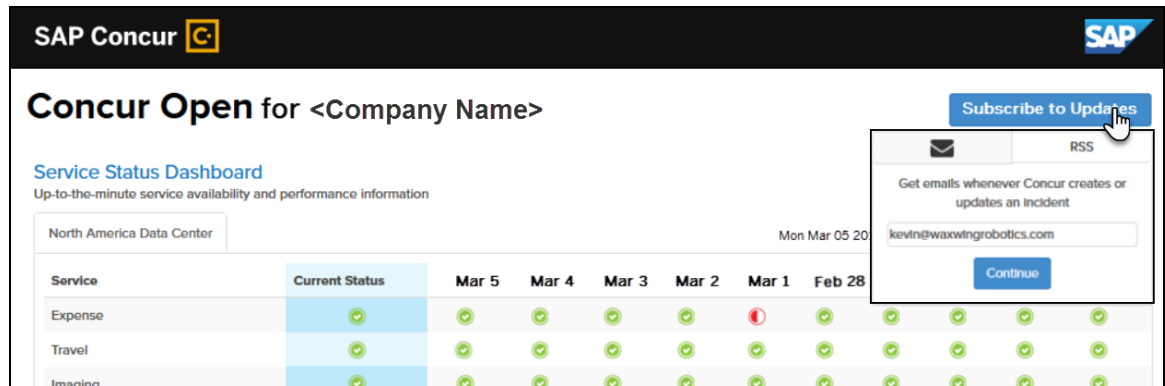


ROOT CAUSE ANALYSIS – OPI-00027																							
Issue Summary Issue ID: OPI-00027 Service(s): Expense Type of incident: Partial Outage Started: Feb 14 12:27 pm PT Ended: Feb 14 12:40 pm PT Concur Expense in the US data center experienced a severe performance degradation for a subset of customers. During the incident, many users either received blocking error messages or their requests timed out. Concur engineers determined this was caused by excessive pressure on a database server that hosts approximately 10% of Concur's customers. Operations and R&D engineers were engaged to resolve the issue. A batch job was identified as consuming excessive resources on the server, preventing other sessions from being able to complete in a timely manner. The batch job was terminated and service immediately returned to normal.																							
Root Cause Analysis - User processing was blocked by a poor performing batch job - The batch job consumed all the CPU cycles on a database server, preventing other sessions from being allocated the necessary resources to complete their processing																							
Corrective Actions <table border="1"> <thead> <tr> <th>Action</th> <th>Status</th> <th>ETA</th> </tr> </thead> <tbody> <tr> <td>Fix the bug that created the infinite loop and deploy to the production site</td> <td>Complete</td> <td>Feb 14, 2018</td> </tr> <tr> <td>Add this scenario to the automated testing suite</td> <td>Complete</td> <td>Feb 16, 2018</td> </tr> <tr> <td>Implement alerting to notify Operations if the job runs long and is at risk of running into business hours</td> <td>Complete</td> <td>Feb 15, 2018</td> </tr> <tr> <td>Implement alerting for all jobs to notify Operations if they are running beyond expected finish times</td> <td>Complete</td> <td>Feb 15, 2018</td> </tr> <tr> <td>Implement auto-remediation to terminate the job before it hits business hours</td> <td>In Progress</td> <td>ETA March 23, 2018</td> </tr> <tr> <td>Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions</td> <td>In Progress</td> <td>ETA March 23, 2018</td> </tr> </tbody> </table>			Action	Status	ETA	Fix the bug that created the infinite loop and deploy to the production site	Complete	Feb 14, 2018	Add this scenario to the automated testing suite	Complete	Feb 16, 2018	Implement alerting to notify Operations if the job runs long and is at risk of running into business hours	Complete	Feb 15, 2018	Implement alerting for all jobs to notify Operations if they are running beyond expected finish times	Complete	Feb 15, 2018	Implement auto-remediation to terminate the job before it hits business hours	In Progress	ETA March 23, 2018	Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions	In Progress	ETA March 23, 2018
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Implement auto-remediation to terminate the job before it hits business hours	In Progress	ETA March 23, 2018																					
Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions	In Progress	ETA March 23, 2018																					
Other notes - The batch job is a necessary part of customer reporting and must remain in place - Terminating the batch job before completion did not cause any data corruption or																							

The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

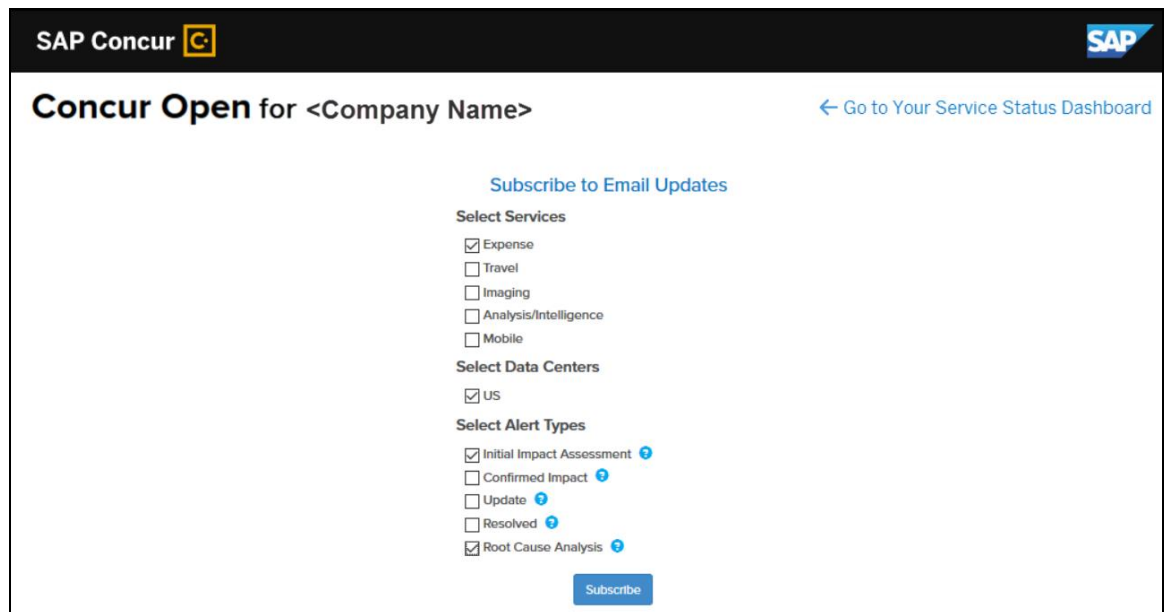
SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.

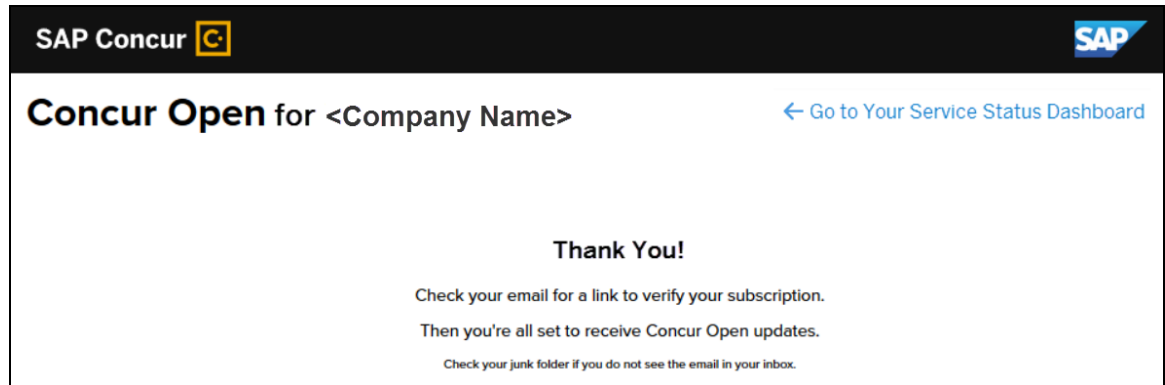


To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address. The user can enter only one email address. It can be their email address associated with their Concur profile, their personal email address, or any other email address.

The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

Note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
 - ♦ Set the user's new subscription to match the company's services and data center
 - ♦ Notify the user of the change

NOTE: Best practice – after the new view is available – is to sign in to the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user subscription will remain the same (not personalized).

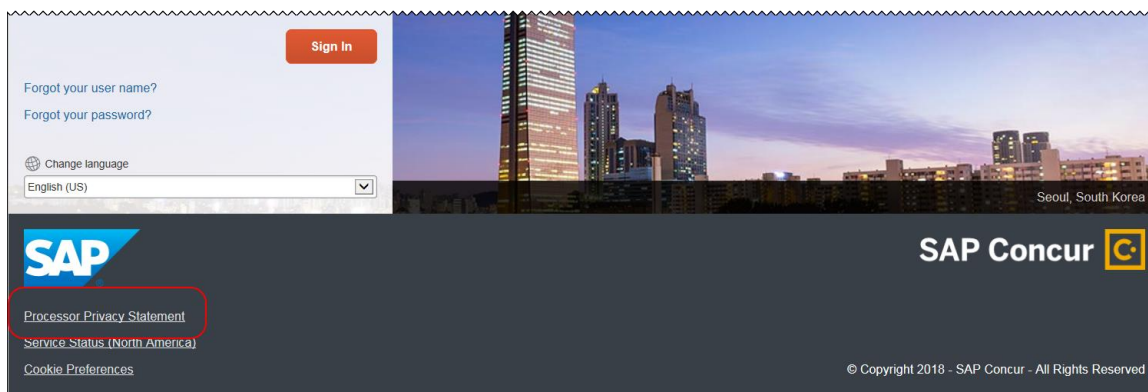
Configuration / Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

****Planned Changes** Processor Privacy Statement Link in Online Help – Targeted for July**

Overview

The **Processor Privacy Statement** link is available in the SAP Concur footer.



However, not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Processor Privacy Statement** link there.

Also – targeted for July – SAP Concur will add the **Processor Privacy Statement** link to online Help.

Configuration / Feature Activation

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

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

! IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File

Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. **There will be no exceptions beyond September 1st, 2018.**

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

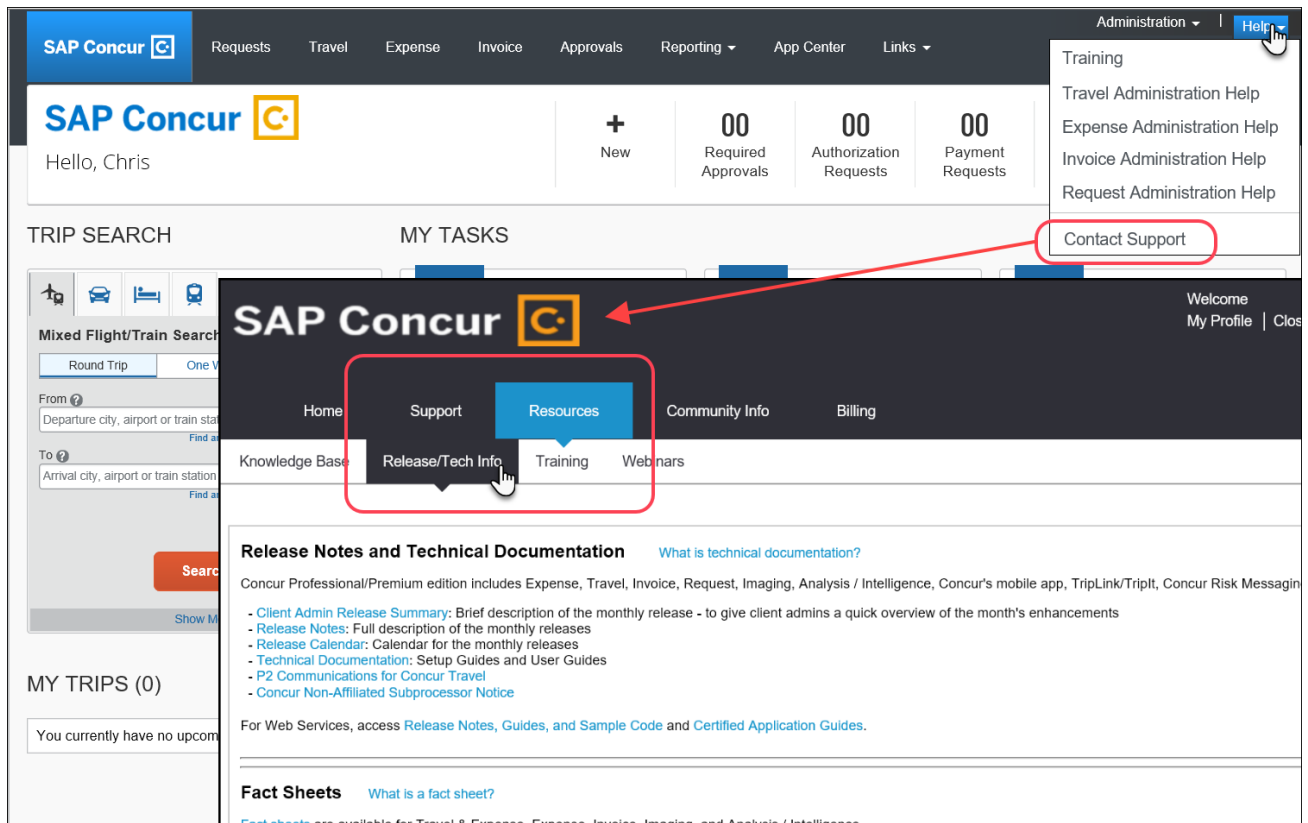
The screenshot displays the SAP Concur Online Help interface for Admins. The top navigation bar includes the SAP Concur logo and various menu items: Requests, Travel, Expense, Invoice, Approvals, Reporting, App Center, and Links. A 'Help' dropdown menu is open, showing options like Training, Expense Help, and Expense Administration Help. The main content area is titled 'Using Online Help' and contains a sidebar with links to 'Resources for Administrators - Professional Edition', 'Expense Professional Administration Guides', and 'Budget Insight (Legacy) Administration Guide'. The main content area also includes 'Quick Links - Concur Professional/Premium' and a table of 'Expense Setup Guides'.

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



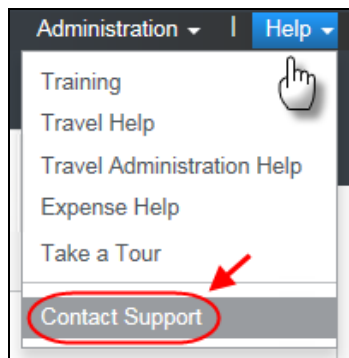
Cases

Steps for Getting a Status

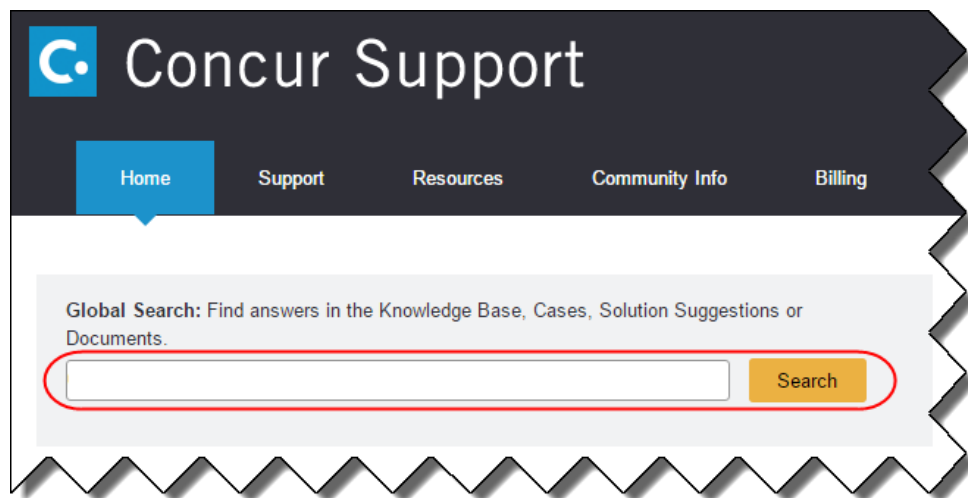
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

June Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: June 16, 2018 Update #2: Wednesday, July 11, 1:00 PM PT	Client FINAL

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Release Notes

Admin

End of TLS 1.0 Email – Targeted for Wednesday, June 27, 2018

In 2017, SAP Concur announced that it was ending support for version 1.0 of the TLS encryption protocol.

Be aware that – targeted for Wednesday June 27, 2018 – SAP Concur will disable the ability to accept incoming email **via TLS 1.0 connectivity** for plans@concurtravel.com and plans@tripit.com.

There should be very little customer impact since the vast majority of customers have already disabled the ability to send email via TLS 1.0.

Configuration / Feature Activation

This change will occur automatically; there are no additional configuration or activation steps.

****Reminder** New Cookie Consent Process**

Overview

Europe has very specific user-consent requirements for cookies. There are two types of consent when allowing cookies to be saved on the user's computer. As described on the following pages, each country decides which option to use. The options are:

- **Active consent:** The user actively agrees to allow cookies. In this case, SAP Concur is required to obtain user consent before saving any cookies on a user's computer.
- **Passive consent:** The user does not disallow cookies.

Each country decides which option it wants to use.

IMPORTANT

This release note discusses consent for and modification of cookies. Note the following:

- TrustArc, a global privacy and data governance provider, manages the cookie preference choice of each user for SAP Concur. Several consent options are described on the following pages.
 - ♦ Be aware the TrustArc provides all consent text and manages all translations of the consent text. Neither SAP Concur nor its customers can affect the text or translation in any way.

- ◆ Consent regulations differ by country. TrustArc determines the consent option that is appropriate for each user, based on each country's regulations. SAP Concur cannot affect that determination in any way nor does SAP Concur have a list of countries and their consent regulations.
- Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.
- SAP Concur uses geolocation – based on the user's IP address – to identify the user's location (country), which determines if user consent is active or passive. Be aware that if the user is using VPN, then geolocation will likely identify the user's country as the country associated with the VPN.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. **There is no option for companies to make these choices for their users.**
- Once a user has actively accepted cookies, they cannot modify their cookies options to stop accepting cookies except to remove all cookies and start over.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

As noted above, each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

ACTIVE CONSENT REQUIRED

If active consent is required – before the user can access any SAP Concur page – the user sees the **About cookies on this site** window.

About cookies on this site



Cookies are important to the proper functioning of a site. To improve your experience, we use cookies to remember log-in details and provide secure log-in, collect statistics to optimize site functionality, and deliver content tailored to your interests. Click Agree and Proceed to accept cookies and go directly to the site or click on View Cookie Settings to see detailed descriptions of the types of cookies and choose whether to accept certain cookies while on the site.

[Agree and Proceed](#)
[View Cookie Settings »](#)

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by:  TrustArc | TRUSTe

The user can:

- Read the agreement text and then click **Agree and Proceed**; the user is then directed into SAP Concur.
– **or** –
- Click **View Cookie Settings** to see other options.

NOTE: The user cannot bypass this page. If the user chooses to **not** accept cookies, the user cannot access SAP Concur.

If the user clicks **View Cookie Settings**, this page appears.

About cookies on this site SAP Concur

Please choose whether this site may use Functional and/or Advertising cookies, as described below:

— REQUIRED COOKIES

These cookies are required to enable core site functionality.

— FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

— **ADVERTISING COOKIES**

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

Cancel **Submit Preferences** **Advanced Settings**

Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

Privacy Policy | Powered by: **TrustArc** | TRUSTe

On this page, the user can slide the bar on the left to accept:

- **Required cookies:** Those required to use SAP Concur services.
- **Required and functional cookies:** Required cookies *plus* those used for performance and usage analysis.
- **Required, functional, and advertising cookies:** Required cookies *plus* functional cookies *plus* cookies used for advertisements.

The user can:

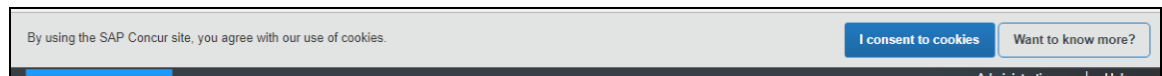
- Click **Cancel** and return to the previous page.
– **or** –
- Slide the bar to make their choice and then click **Submit Preferences**.
– **or** –
- Click **Advanced Settings**.

If the user clicks **Advanced Settings**, they will see a read-only view of the existing cookies.

Once the user consents, the requirement is satisfied and the consent message does not appear again.

PASSIVE CONSENT

In some countries, once the user has accessed SAP Concur, a banner similar to the one below appears at the top of the SAP Concur page.



Whether or not the user actively consents, consent is implied. The user can continue to work in SAP Concur and the banner does not interfere with the user's tasks; however, the banner remains until the user clicks **I consent to cookies**.

The user clicks **Want to know more?**, the user sees the cookie options (as described previously).

About cookies on this site



Please choose whether this site may use Functional and/or Advertising cookies, as described below:

—

—

—

—

REQUIRED COOKIES

These cookies are required to enable core site functionality.

FUNCTIONAL COOKIES

These cookies allow us to analyze site usage so we can measure and improve performance.

ADVERTISING COOKIES

These cookies are used by advertising companies to serve ads that are relevant to your interests.

Functionality allowed

- Provide secure log-in
- Remember how far you are through an order
- Remember your log-in details
- Remember what is in your shopping cart
- Make sure the website looks consistent
- Allow you to share pages with social networks
- Allow you to post comments
- Serve ads relevant to your interests

[Cancel](#)
[Submit Preferences](#)
[Advanced Settings](#)

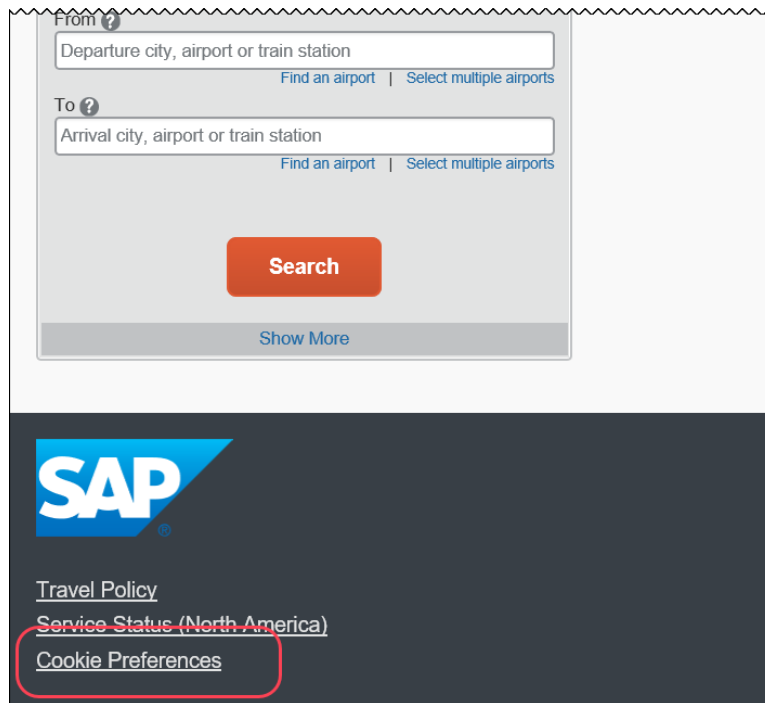
Some opt-outs may fail due to your browsers cookies settings. If you would like to set opt-out preferences using this tool you must allow third party cookies in your browser settings.

[Privacy Policy](#) | Powered by:  [TrustArc](#) | [TRUSTe](#)

Once the user consents, the requirement is satisfied and the banner does not appear again.

MAKING CHANGES

The **Cookie Preferences** link appears in the SAP Concur footer.



This link allows users to view their existing cookie settings. To modify existing cookie preferences, TrustArc requires that the user clear all existing cookies and then choose a new setting.

⚠ IMPORTANT: Not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Cookie Preferences** link there.

Configuration / Feature Activation

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

****Reminder** Whitelist for TrustArc.com**

Overview

The May release notes included an item named *New Cookie Preferences Link in the SAP Concur Footer*. It describes cookie-related process changes that were introduced in the May 12 release because of specific consent regulations in Europe.

To ensure that SAP Concur properly responds to the regulations, SAP Concur has enlisted the assistance of TrustArc, a global privacy and data governance provider.

Please ensure that your organization's IT (or similar) department adds TrustArc to its whitelist, so TrustArc can properly monitor and manage these processes.

TrustArc must be whitelisted by domain – **not IP** – since the IP is variable. Please whitelist these domains:

- trustarc.com
- prefmgr-cookie.truste-svc.net

⚠ IMPORTANT: Be aware that if TrustArc is not whitelisted, then it cannot present the required page to obtain the user's permission to accept cookies. That means that if a user's geolocation is France, Germany, or the Netherlands, the user may not be able to access concursolutions.com.

BUSINESS PURPOSE / CLIENT BENEFIT

Whitelisting ensures that TrustArc has the proper access to manage consent regulations on behalf of SAP Concur.

Configuration / Feature Activation

There are no configuration steps except to ensure that TrustArc is whitelisted for your organization.

Company Cards

AirPlus CDF3 Lodge - Transaction Identifier Mapping

Overview

With this release, the unique identifier (`_TransId`) of an AirPlus Lodge transaction will be mapped to `FinancialTransaction_5000/AcquirerReferenceData` instead of `FinancialTransaction_5000/MasterCardFinancialTransactionId`.

This update, made at the request of AirPlus, will allow customers to automatically clear the credit card account based on the provided AirPlus Document Number (`AcquirerReferenceData`). Note that the `MasterCardFinancialTransactionId` value will continue to be used for Lodge transactions coming from MasterCard, and for Corporate Cards, including those coming from AirPlus.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement provides flexibility when working with the AirPlus card account.

Configuration / Feature Activation

The change occurs automatically and applies to customers using the AirPlus CDF v.3 Lodge integration; there are no additional configuration or activation steps on Concur.

side. However, customers might need to adapt their financial system to support the automatic clearing of the card account.

Diners Australia: Support for Copy Down of GST Supply Indicator into a Custom Field

Overview

With this release, any value detected in the **GST Supply Indicator** field (at position 779) of the Diner's Club data feed importer is now stored by Expense in a transaction-level custom field. This change supports copy down from the card transaction to an expense entry field where it is visible to the user for further processing.

Prior to this change, this value in the Diner's Club data feed importer was ignored by Concur on the integration side.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement brings the Diner's Club data feed importer to parity with other importers that perform the same function. Additionally, this functionality allows customers to require only a receipt on verification of tax requirements.

Configuration / Feature Activation

The client should confer with a Technical Consultant to have the **Credit Card Entry Mapping** site setting configured for this behavior.

The value can be interpreted this way

- P = (GST Payable) GST verified (receipt not required)
- M = (Mixed Supply) GST verified (receipt not required)
- F = (GST Free) GST NOT verified (receipt required)
- Blank = Companion Card

Currency Admin – Postponed

(Venezuela) New Currency Supported: Bolívar Soberano VES

Overview

The new currency, Bolívar Soberano (VES), is currently available in Concur; however, the ISO 4217 AMENDMENT NUMBER 166 announcing the new currency has now been superseded by ISO 4217 AMENDMENT NUMBER 167 which postpones the redenomination of the currency for an indefinite amount of time.

SAP Concur will provide an update to remove the new currency in the near future.

Expense Pay – Global

(United States) Additional Card Program Now Supported for USD

Overview

Expense Pay – Global for Expense now supports the following credit card program for the United States Dollar (USD \$):

- Silicon Valley Bank MasterCard USD

BUSINESS PURPOSE / CLIENT BENEFIT

This additional option can expedite the processing of credit card expenses.

What the Admin Sees

These additional card program is available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

Add New Card Program ✕

Program Name

Payment Type

Program Type:
 [Verify IIN](#)

Currency

Active

☐ Classic ☐ Global

Configuration / Feature Activation

Concur automatically implemented this change; there are no configuration or activation steps.

Japan Public Transport (JPT)

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE / CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration / Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

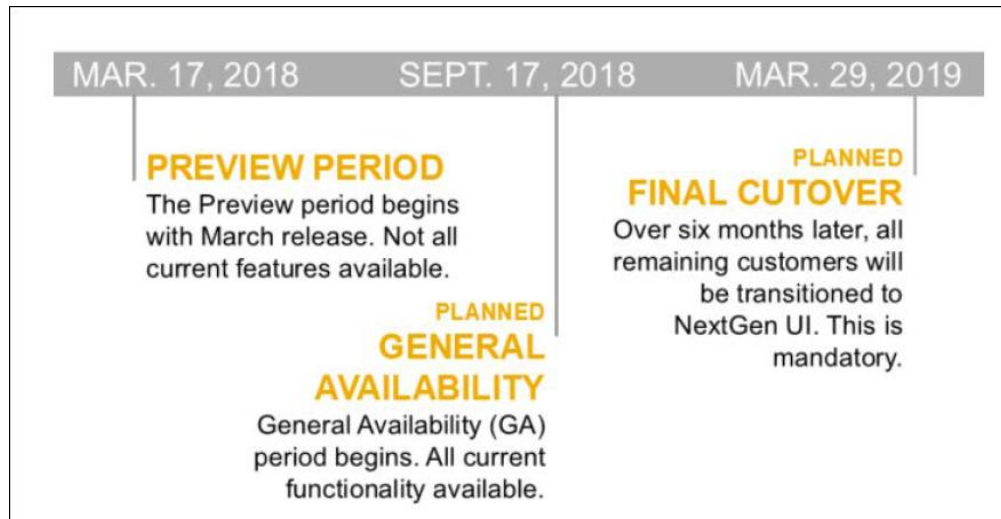
****Ongoing** New User Interface for Concur Expense End Users**

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.



BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users

to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

SAP Concur's Platform

Callout Server Requirements Update

Overview

SAP Concur is upgrading the servers that support the SAP Concur Platform Callouts. This maintenance includes the Production Proxy Migration (North America Data Center only) and PWS Server Migration to VM (EMEA And North American Data Centers only). The PWS Server Migration to VM was completed on May 2, 2018. The Production Proxy Migration began on May 9, 2018, and will be completed in a future release.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.
- Clients who whitelist access for Concur callout traffic from the North America Data Center (not common) may need to update their access control list (ACL) to IP 12.129.29.86.

 **IMPORTANT:** If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE / CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration / Feature Activation

SAP Concur is automatically implementing these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expenses Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

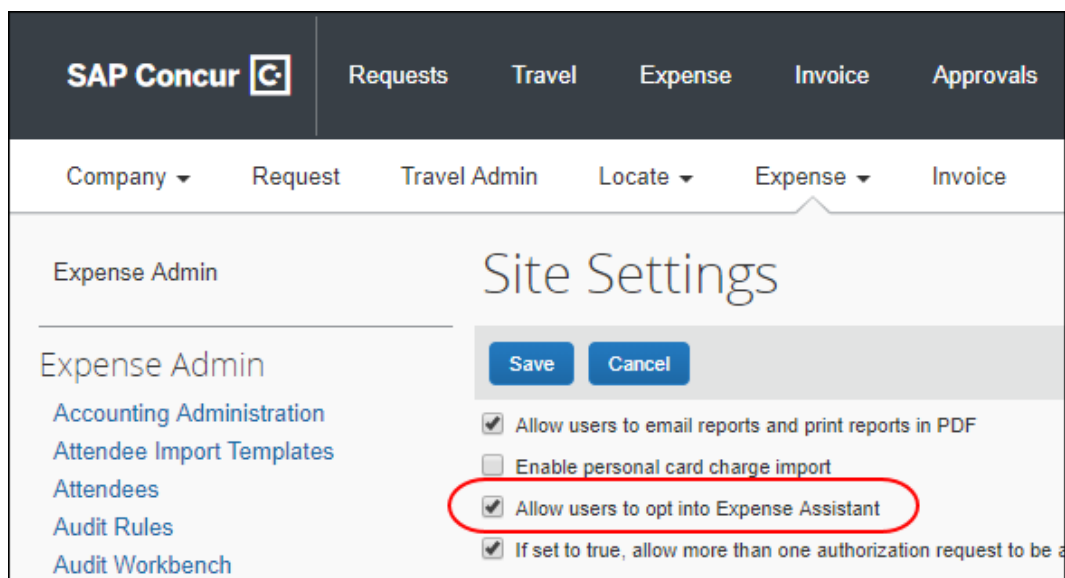
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

⚠ IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

****Planned Changes** Personalized Concur Open**

Concur Open is the SAP Concur real-time service status dashboard, which displays outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

In a future release, there will be new functionality added to Concur Open. Users will continue to access Concur Open and view Concur service availability. However, in addition, SAP Concur users will be able to log in to Concur Open and:

- View service status for the services and the data center specific to their company
- Access subscription options for updates about the incidents that impact the services specific to their company
- View service history for the past two years, including detailed root cause analysis information and the actions taken by SAP Concur for each incident

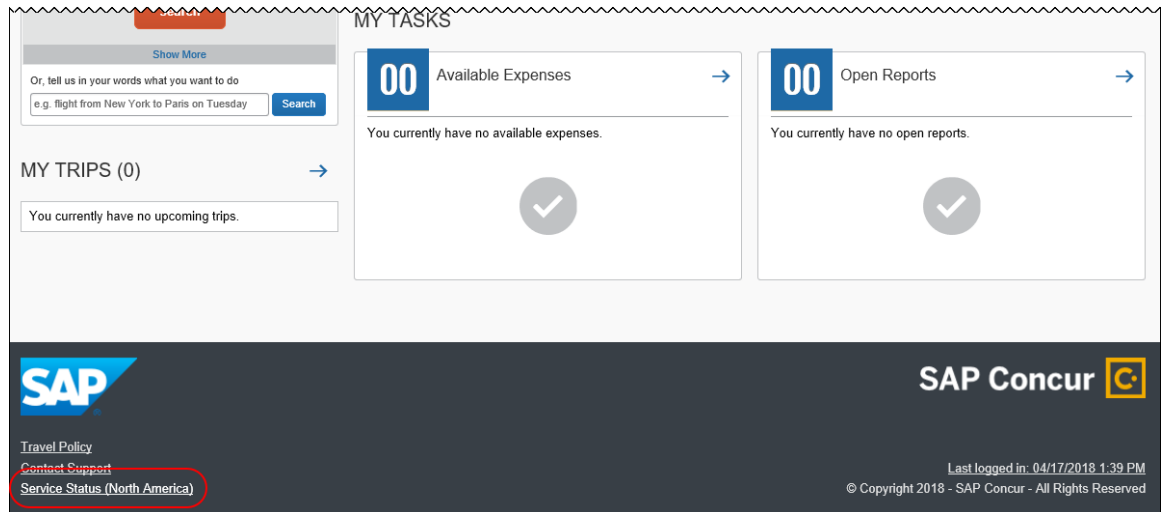
BUSINESS PURPOSE / CLIENT BENEFIT

Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding this new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

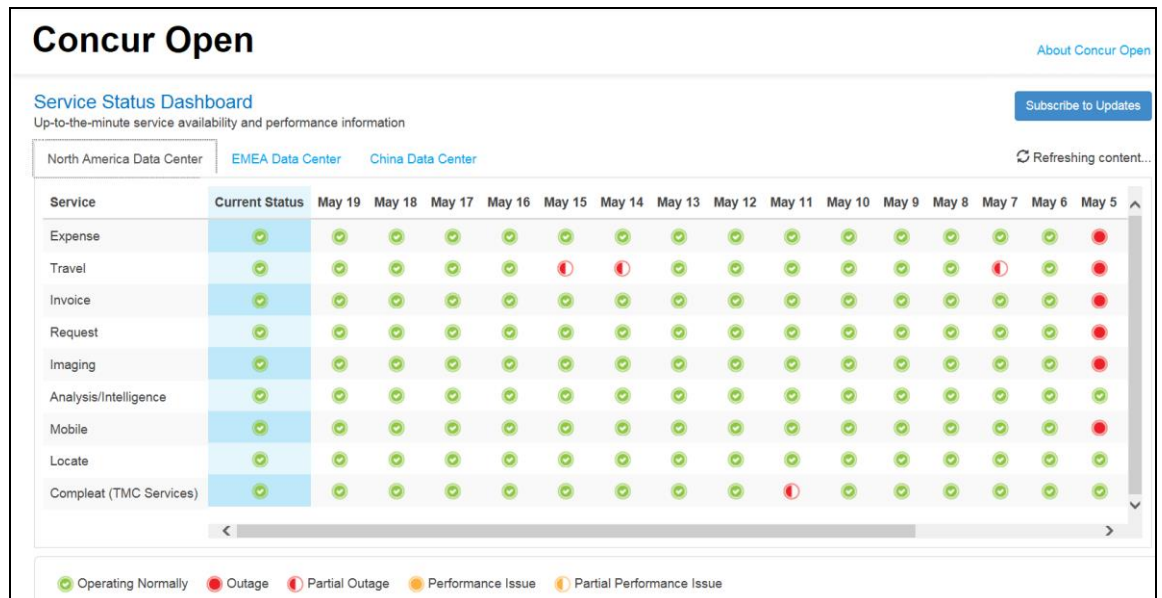
Users can access Concur Open two ways:

- Enter the public site directly using <https://open.concur.com>
– or –
- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



Concur Open appears.

What the User Sees – Current View



The user sees the data center tabs, the service activity (up to the previous 20 days), the legend (bottom of the page), and the **Subscribe to Updates** button (upper-

right corner). The user can click **Subscribe to Updates** to request notifications for service and incident changes.

What the User Sees – New View and Process

The user will access Concur Open the same way they do now – either via the public site (open.concur.com) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.

Service	Current Status	Mar 5	Mar 4	Mar 3	Mar 2	Mar 1	Feb 28	Feb 27	Feb 26	Feb 25	Feb 24
Expense	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Partial Outage	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Travel	Partial Outage	Partial Outage	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Invoice	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Request	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Imaging	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Analysis/Intelligence	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Partial Outage
Mobile	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally

Operating Normally
Outage
Partial Outage
Performance Issue
Partial Performance Issue

Just like before, the user can see all data centers and services and can use the **Subscribe to Updates** button. In fact, that will not change – anyone can access the public version (open.concur.com) and anyone can request notifications.

NOTE: The ability for non-customers to request notifications will likely be eliminated in the future.

With the release of Personalized Concur Open, the main change is that the **Go to Your Service Status Dashboard** button also appears on the main page. Whether the user accesses Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

- For customers that do not use SSO, users sign in with their SAP Concur username and password.
- For customers that do use SSO, users can access the personalized view using their email address (described below).

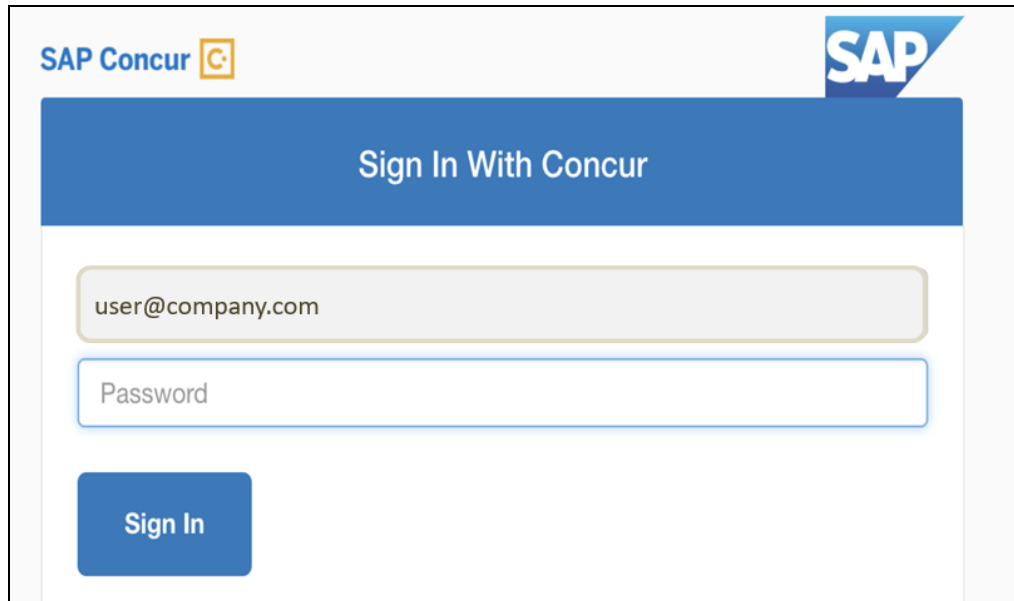
On the main page, the user clicks the **Go to Your Service Status Dashboard** button. The **Sign In With Concur** page appears.

Click to expand the list.'"/>

Then, depending on the customer's implementation of SAP Concur:

- **Username and password:** If the user signs in to SAP Concur using username and password:

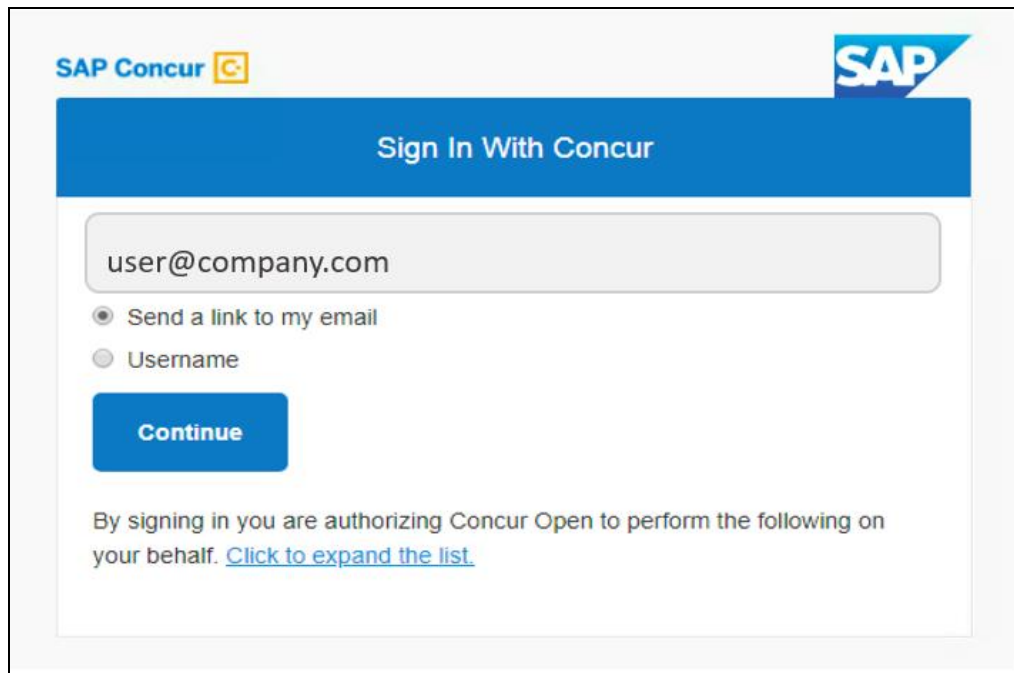
Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**. This page appears.



The screenshot shows the SAP Concur login interface. At the top left is the 'SAP Concur' logo, and at the top right is the 'SAP' logo. Below these is a blue header bar with the text 'Sign In With Concur'. Underneath the header, there is a light gray input field containing the text 'user@company.com'. Below that is a white input field with the placeholder text 'Password'. At the bottom left of the form area is a blue button with the text 'Sign In'.

The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:



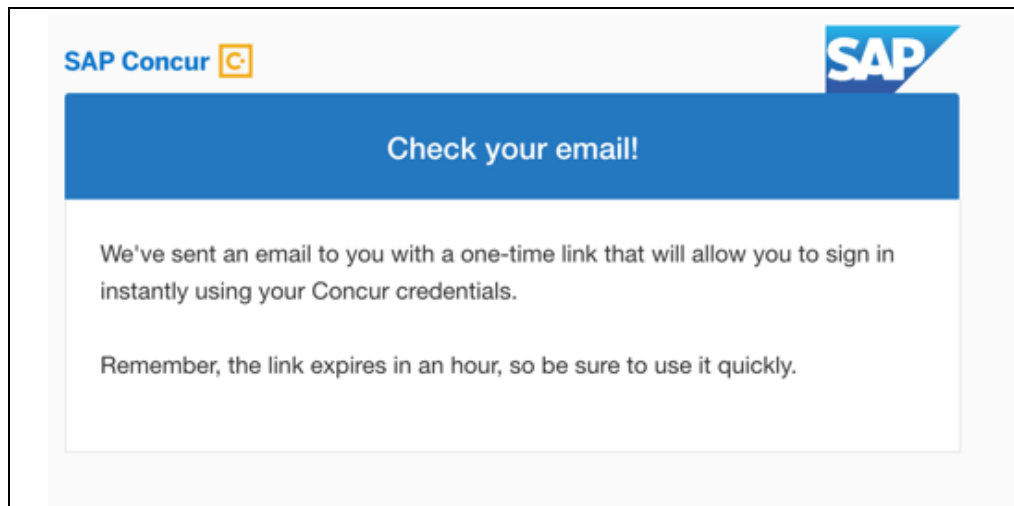
The screenshot shows the SAP Concur login interface for Single Sign-On (SSO). At the top left is the 'SAP Concur' logo, and at the top right is the 'SAP' logo. Below these is a blue header bar with the text 'Sign In With Concur'. Underneath the header, there is a light gray input field containing the text 'user@company.com'. Below that are two radio buttons: the first is selected and labeled 'Send a link to my email', and the second is unselected and labeled 'Username'. At the bottom left of the form area is a blue button with the text 'Continue'. Below the button, there is a message: 'By signing in you are authorizing Concur Open to perform the following on your behalf. [Click to expand the list.](#)'

Then, on this page, the user enters their email address (see below), clicks **Send a link to my email**, and clicks **Continue**.

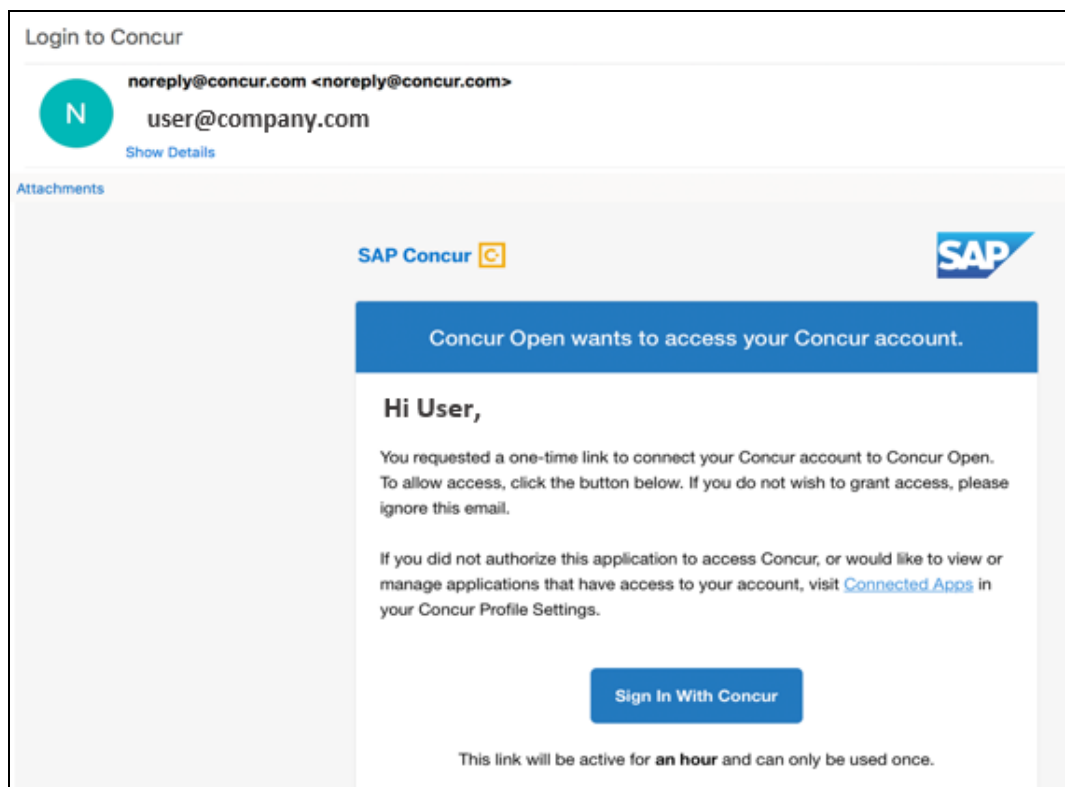


IMPORTANT: SAP Concur compares the email address entered by the user to the email address(es) in the user's SAP Concur profile. (This is not restricted to the **Email 1** field; this includes all email addresses in the **Email Addresses** section in the user's profile.) If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

This message appears:



An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. Personalized Concur Open appears.

NOTE: The one-time link is active for one hour. If the user closes the browser and if the user wants to return to the personalized view, the user must request another one-time link.

Once signed in, the personalized **Service Status Dashboard** page appears.

SAP Concur  

Concur Open for <Company Name> [Subscribe to Updates](#)

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center Mon Mar 05 2018 12:43:27 GMT-0800 (Pacific Standard Time)

Service	Current Status	Mar 5	Mar 4	Mar 3	Mar 2	Mar 1	Feb 28	Feb 27	Feb 26	Feb 25	Feb 24
Expense											
Travel											
Imaging											
Analysis/Intelligence											
Mobile											

Operating Normally
 Outage
 Partial Outage
 Performance Issue
 Partial Performance Issue

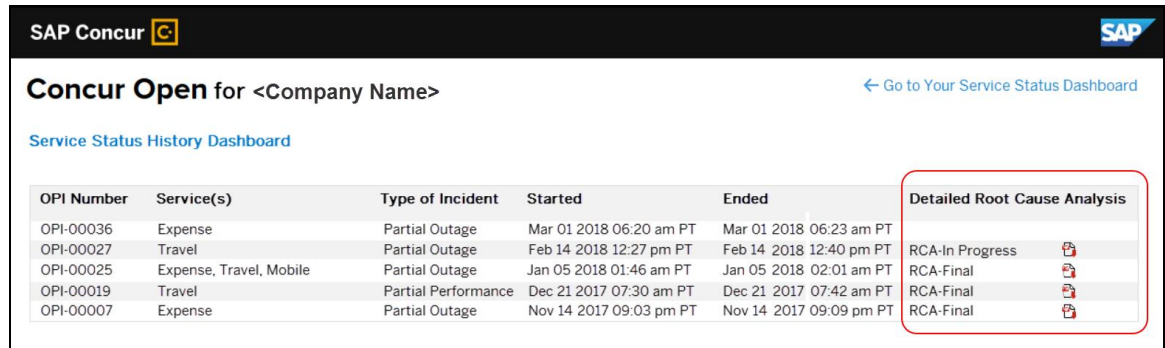
[View Service Status History](#)

On this page, the user can:

- View:
 - ♦ **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes **only** those that the user's company uses.
 - ♦ **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company. The accuracy of determining this is not perfect, so it is possible that a customer may be shown an incident that did not actually affect them.
- Subscribe to updates

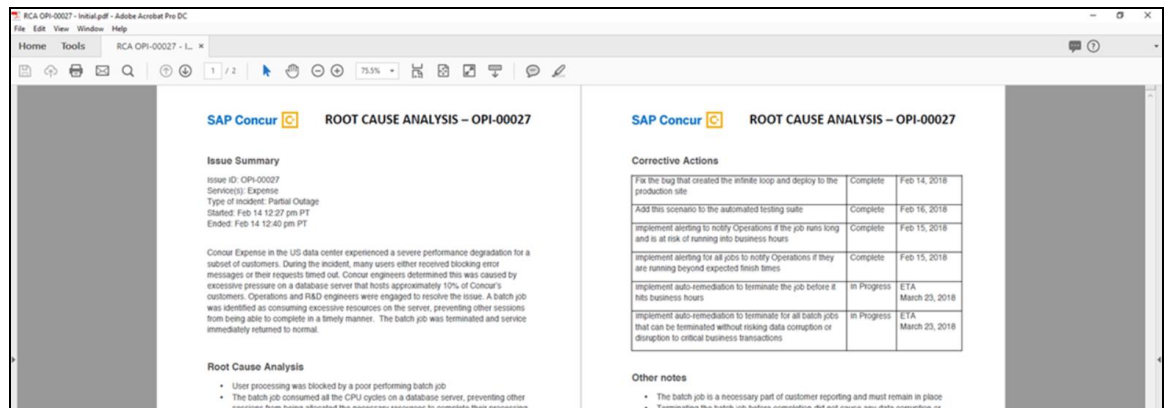
VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



OPI Number	Service(s)	Type of Incident	Started	Ended	Detailed Root Cause Analysis
OPI-00036	Expense	Partial Outage	Mar 01 2018 06:20 am PT	Mar 01 2018 06:23 am PT	RCA-In Progress 
OPI-00027	Travel	Partial Outage	Feb 14 2018 12:27 pm PT	Feb 14 2018 12:40 pm PT	RCA-Final 
OPI-00025	Expense, Travel, Mobile	Partial Outage	Jan 05 2018 01:46 am PT	Jan 05 2018 02:01 am PT	RCA-Final 
OPI-00019	Travel	Partial Performance	Dec 21 2017 07:30 am PT	Dec 21 2017 07:42 am PT	RCA-Final 
OPI-00007	Expense	Partial Outage	Nov 14 2017 09:03 pm PT	Nov 14 2017 09:09 pm PT	RCA-Final 

The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for each incident.

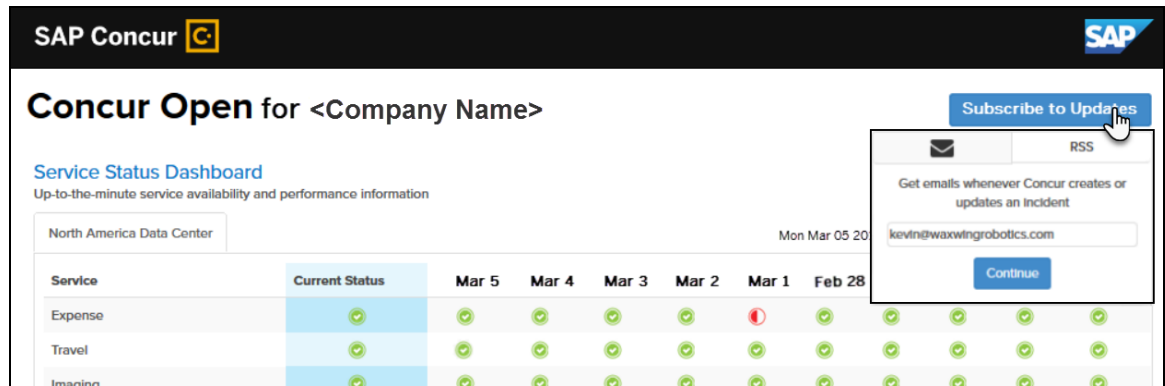


ROOT CAUSE ANALYSIS – OPI-00027																							
Issue Summary Issue ID: OPI-00027 Service(s): Expense Type of incident: Partial Outage Started: Feb 14 12:27 pm PT Ended: Feb 14 12:40 pm PT Concur Expense in the US data center experienced a severe performance degradation for a subset of customers. During the incident, many users either received blocking error messages or their requests timed out. Concur engineers determined this was caused by excessive pressure on a database server that hosts approximately 10% of Concur's customers. Operations and R&D engineers were engaged to resolve the issue. A batch job was identified as consuming excessive resources on the server, preventing other sessions from being able to complete in a timely manner. The batch job was terminated and service immediately returned to normal.																							
Root Cause Analysis - User processing was blocked by a poor performing batch job - The batch job consumed all the CPU cycles on a database server, preventing other sessions from being allocated the necessary resources to complete their processing																							
Corrective Actions <table border="1"> <thead> <tr> <th>Action</th> <th>Status</th> <th>ETA</th> </tr> </thead> <tbody> <tr> <td>Fix the bug that created the infinite loop and deploy to the production site</td> <td>Complete</td> <td>Feb 14, 2018</td> </tr> <tr> <td>Add this scenario to the automated testing suite</td> <td>Complete</td> <td>Feb 16, 2018</td> </tr> <tr> <td>Implement alerting to notify Operations if the job runs long and is at risk of running into business hours</td> <td>Complete</td> <td>Feb 15, 2018</td> </tr> <tr> <td>Implement alerting for all jobs to notify Operations if they are running beyond expected finish times</td> <td>Complete</td> <td>Feb 15, 2018</td> </tr> <tr> <td>Implement auto-remediation to terminate the job before it hits business hours</td> <td>In Progress</td> <td>ETA March 23, 2018</td> </tr> <tr> <td>Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions</td> <td>In Progress</td> <td>ETA March 23, 2018</td> </tr> </tbody> </table>			Action	Status	ETA	Fix the bug that created the infinite loop and deploy to the production site	Complete	Feb 14, 2018	Add this scenario to the automated testing suite	Complete	Feb 16, 2018	Implement alerting to notify Operations if the job runs long and is at risk of running into business hours	Complete	Feb 15, 2018	Implement alerting for all jobs to notify Operations if they are running beyond expected finish times	Complete	Feb 15, 2018	Implement auto-remediation to terminate the job before it hits business hours	In Progress	ETA March 23, 2018	Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions	In Progress	ETA March 23, 2018
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Fix the bug that created the infinite loop and deploy to the production site	Complete	Feb 14, 2018																					
Add this scenario to the automated testing suite	Complete	Feb 16, 2018																					
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Implement alerting for all jobs to notify Operations if they are running beyond expected finish times	Complete	Feb 15, 2018																					
Implement auto-remediation to terminate the job before it hits business hours	In Progress	ETA March 23, 2018																					
Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions	In Progress	ETA March 23, 2018																					
Other notes - The batch job is a necessary part of customer reporting and must remain in place - Terminating the batch job before completion did not cause any data corruption or																							

The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

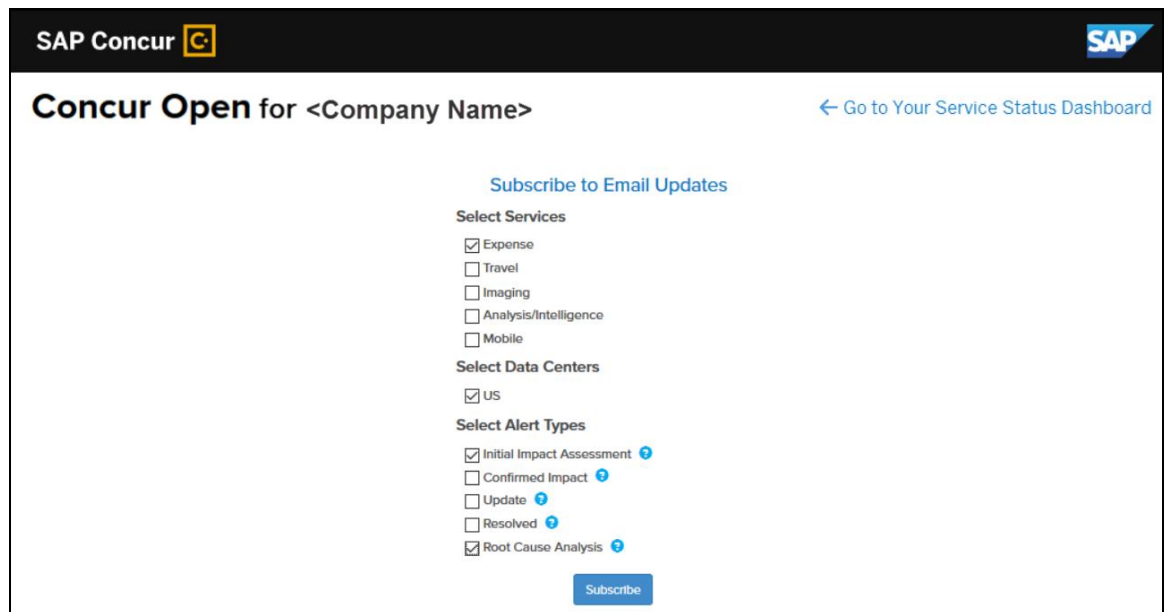
SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.

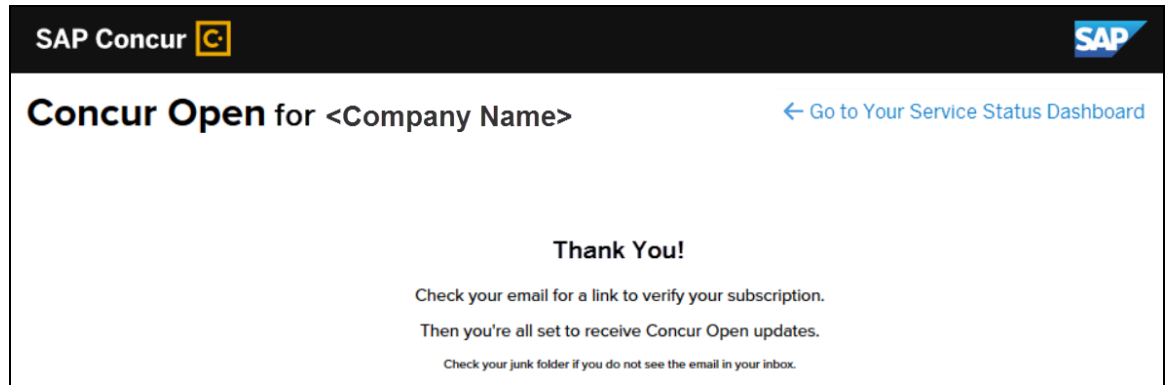


To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address. The user can enter only one email address. It can be their email address associated with their Concur profile, their personal email address, or any other email address.

The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

Note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
 - ♦ Set the user's new subscription to match the company's services and data center
 - ♦ Notify the user of the change

NOTE: Best practice – after the new view is available – is to sign in to the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user subscription will remain the same (not personalized).

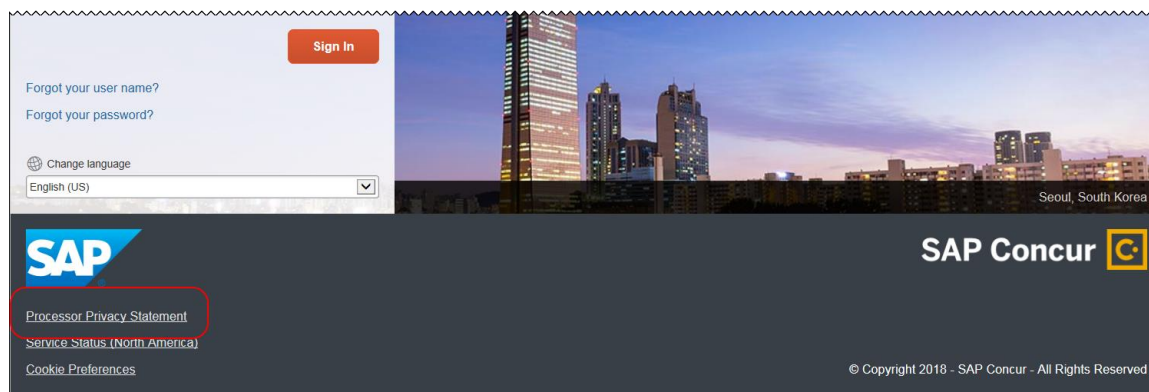
Configuration / Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

****Planned Changes** Processor Privacy Statement Link in Online Help – Targeted for July**

Overview

The **Processor Privacy Statement** link is available in the SAP Concur footer.



However, not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Processor Privacy Statement** link there.

Also – targeted for July – SAP Concur will add the **Processor Privacy Statement** link to online Help.

Configuration / Feature Activation

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

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

⚠ IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File

Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. **There will be no exceptions beyond September 1st, 2018.**

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

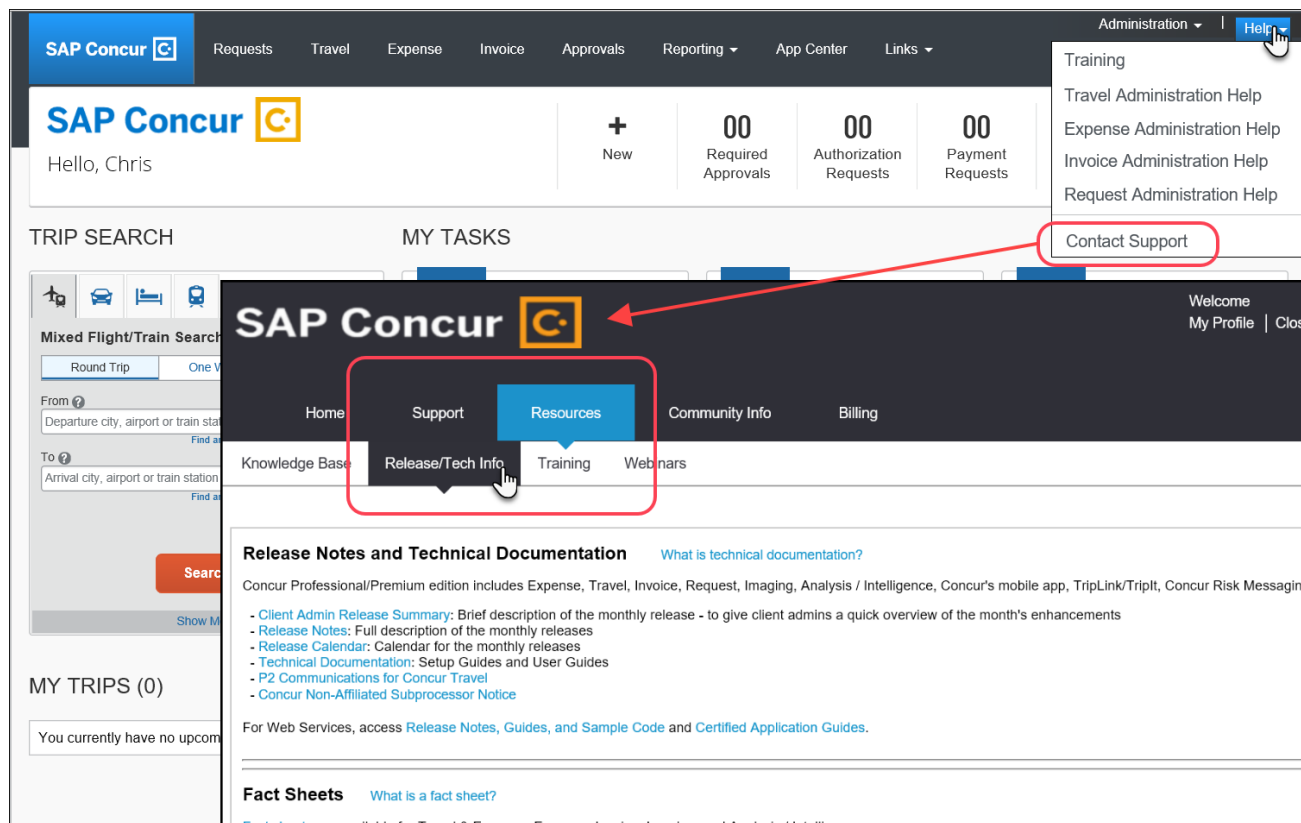
Expense Setup Guides

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



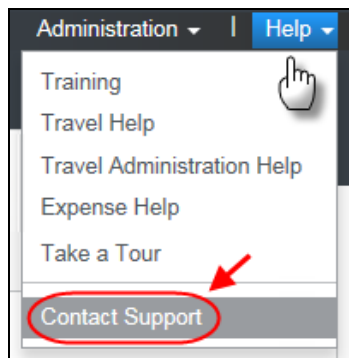
Cases

Steps for Getting a Status

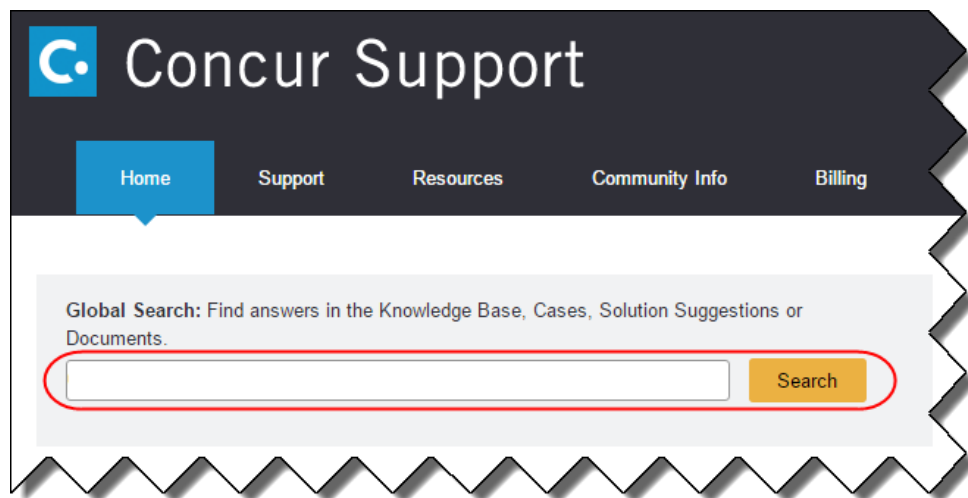
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

June Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: July 21, 2018 Initial Post: Friday, July 20, 10:00 AM PT	Client FINAL

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Release Notes

Admin

Personalized Concur Open – Targeted for End of July

Overview

Concur Open is the SAP Concur near-real-time service status dashboard, which displays known and widespread outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

Targeted for the end of July, there will be new functionality added to Concur Open. Users can continue to access Concur Open and view Concur service availability; no functionality will be removed. However, with the release, SAP Concur users will be able to log in to Concur Open and:

- View service status for the services and the data center that are *specific to their company*
- Access subscription options for updates about the incidents that impact the services *specific to their company*
- View service history for the past two years as well as detailed root cause analysis information and the actions taken by SAP Concur for specific incidents

BUSINESS PURPOSE/CLIENT BENEFIT

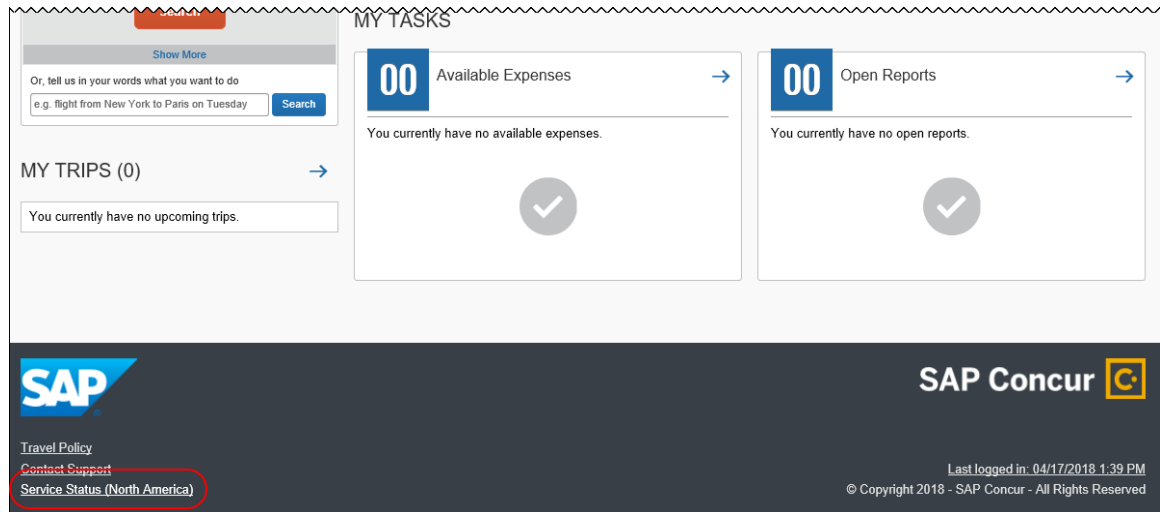
Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding the new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

Users can access Concur Open two ways:

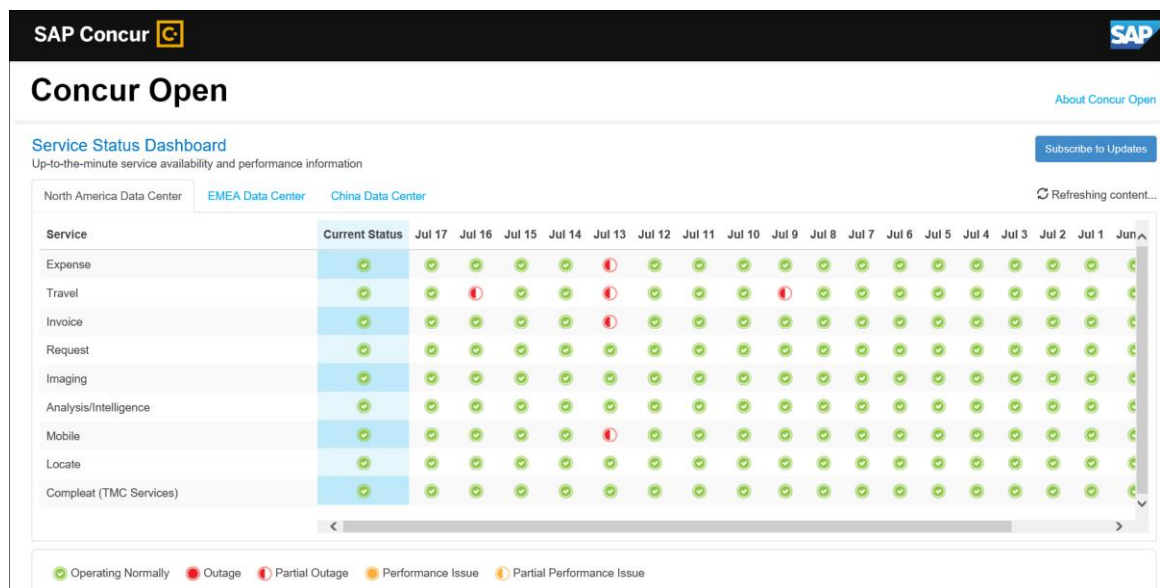
- Enter the public site directly using <https://open.concur.com>
– **or** –

- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



Concur Open appears.

What the User Sees – Current View



Currently, the user sees all data center tabs, the service activity (up to the previous 20 days), and the "service" legend (bottom of the page).

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center | **EMEA Data Center** | China Data Center

Tue Jul 17 2018 14:59:57 GMT-0700 (Pacific Daylight Time)

Service	Current Status	Jul 17	Jul 16	Jul 15	Jul 14	Jul 13	Jul 12	Jul 11	Jul 10	Jul 9	Jul 8	Jul 7	Jul 6	Jul 5	Jul 4	Jul 3	Jul 2	Jul 1	Jun 30
Expense	Operating Normally	✓	✓	✓	✓	⚠	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Travel	Operating Normally	✓	✓	⚠	✓	⚠	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Invoice	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Request	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Imaging	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Analysis/Intelligence	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mobile	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Locate	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Compleat (TMC Services)	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Operating Normally
Outage
Partial Outage
Performance Issue
Partial P

SAP Concur

Concur Open

[Back to Concur Open](#)

Partial Outage Issue

Services affected: Travel

OPI-1861986

Started: Fri Jul 13 11:35 am PT

Ended: Fri Jul 13 11:59 am PT

Root Cause Analysis Tue Jul 17 12:41 pm PT

At 11:06 AM PT, on 13 July 2018, The Operations Team was alerted to an approximate 25% drop in overall logins, which Services, as well as the Mobile Application. The incident caused a Partial Outage to these Services resulting in a user exp unable to Search or Book Travel and Submit Expense Reports and Invoices. The issue did not affect standard login via Co group of Application Servers that were inadvertently removed from operation and was resolved by placing the Servers bac discovery revealed the primary root cause of the Incident to be planned maintenance that resulted in an existing set of App mitigation for this maintenance, to ensure Application Servers were always active, had been incorrectly applied which res these servers are never removed from active operation.

Resolved Fri Jul 13 12:36 pm PT

We have resolved the issue and will provide the root cause analysis as soon as possible.

The user can click an icon to review information about service activity.

The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New View and Process

The user will access Concur Open the same way they do now – either via the public site (open.concur.com) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.

Concur Open [Subscribe to Updates](#) [Go to Your Service Status Dashboard](#)

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center [EMEA Data Center](#) [China Data Center](#) Mon Mar 05 2018 12:43:27 GMT-0800 (Pacific Standard Time)

Service	Current Status	Mar 5	Mar 4	Mar 3	Mar 2	Mar 1	Feb 28	Feb 27	Feb 26	Feb 25	Feb 24
Expense											
Travel											
Invoice											
Request											
Imaging											
Analysis/Intelligence											
Mobile											

Operating Normally
 Outage
 Partial Outage
 Performance Issue
 Partial Performance Issue

On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button – just like they currently do. In fact, that will not change – anyone can access the public version (open.concur.com) and anyone can request notifications.

NOTE: The ability for non-customers to request notifications will likely be eliminated in the future.

With the release of Personalized Concur Open, the main change is that the **Go to Your Service Status Dashboard** button also appears on the main page. Whether the user accesses Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

- For customers who do not use SSO, users sign in with their SAP Concur username and password.
- For customers who do use SSO, users can access the personalized view using their email address (described below).

On the main page, the user clicks the **Go to Your Service Status Dashboard** button. The **Sign In With Concur** page appears.

Click to expand the list.'"/>

Then, depending on the customer's implementation of SAP Concur:

- **Username and password:** If the user signs in to SAP Concur using username and password:

Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**. This page appears.

The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:

Click to expand the list.'"/>

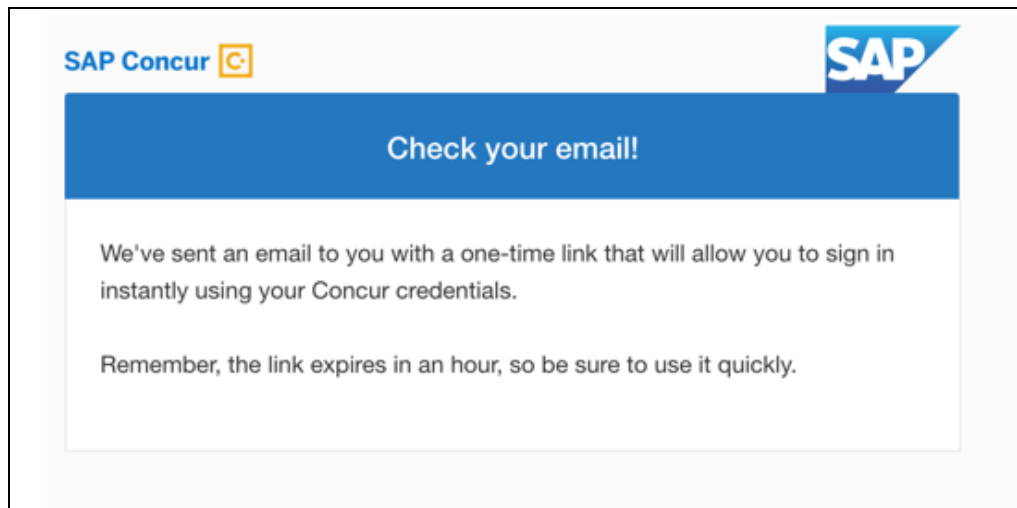
Then, on this page, the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.

SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

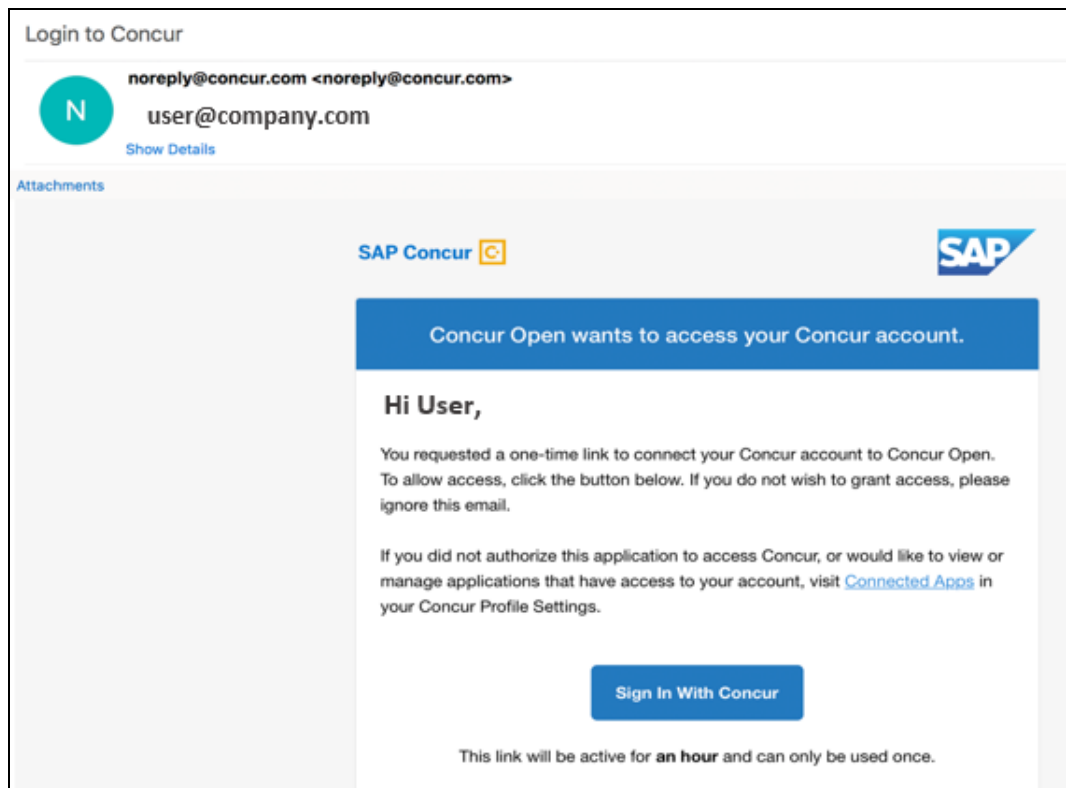


Refer to *More About Email Addresses in Profile* for more detail.

This message appears:



An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. Personalized Concur Open appears.

NOTE: The one-time link is active for one hour. If the user closes the browser, then the user must request another one-time link when they want to return to the personalized view.

Once signed in, the personalized **Service Status Dashboard** page appears.

SAP Concur

Concur Open for <Company Name>

[Subscribe to Updates](#)

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center Mon Mar 05 2018 12:43:27 GMT-0800 (Pacific Standard Time)

Service	Current Status	Mar 5	Mar 4	Mar 3	Mar 2	Mar 1	Feb 28	Feb 27	Feb 26	Feb 25	Feb 24
Expense	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Partial Outage	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Travel	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Imaging	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Analysis/Intelligence	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally
Mobile	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally	Operating Normally

Operating Normally
Outage
Partial Outage
Performance Issue
Partial Performance Issue

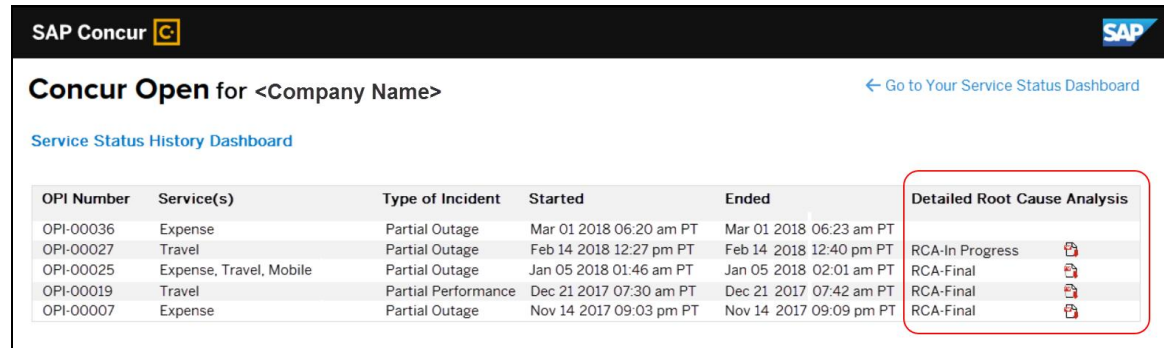
[View Service Status History](#)

On this page, the user can:

- View:
 - ♦ **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes **only** those that the user's company uses.
 - ♦ **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company.
- Subscribe to updates

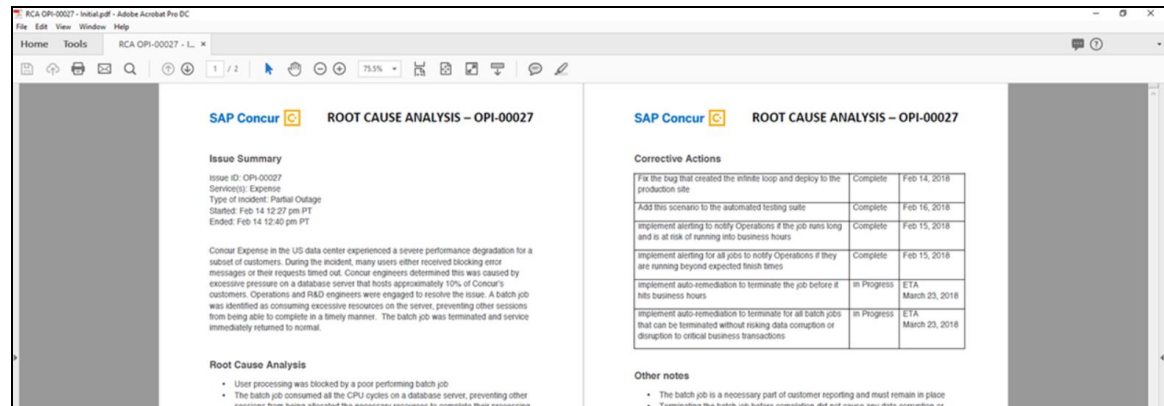
VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



OPI Number	Service(s)	Type of Incident	Started	Ended	Detailed Root Cause Analysis
OPI-00036	Expense	Partial Outage	Mar 01 2018 06:20 am PT	Mar 01 2018 06:23 am PT	RCA-In Progress
OPI-00027	Travel	Partial Outage	Feb 14 2018 12:27 pm PT	Feb 14 2018 12:40 pm PT	RCA-Final
OPI-00025	Expense, Travel, Mobile	Partial Outage	Jan 05 2018 01:46 am PT	Jan 05 2018 02:01 am PT	RCA-Final
OPI-00019	Travel	Partial Performance	Dec 21 2017 07:30 am PT	Dec 21 2017 07:42 am PT	RCA-Final
OPI-00007	Expense	Partial Outage	Nov 14 2017 09:03 pm PT	Nov 14 2017 09:09 pm PT	RCA-Final

The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for specific incidents.



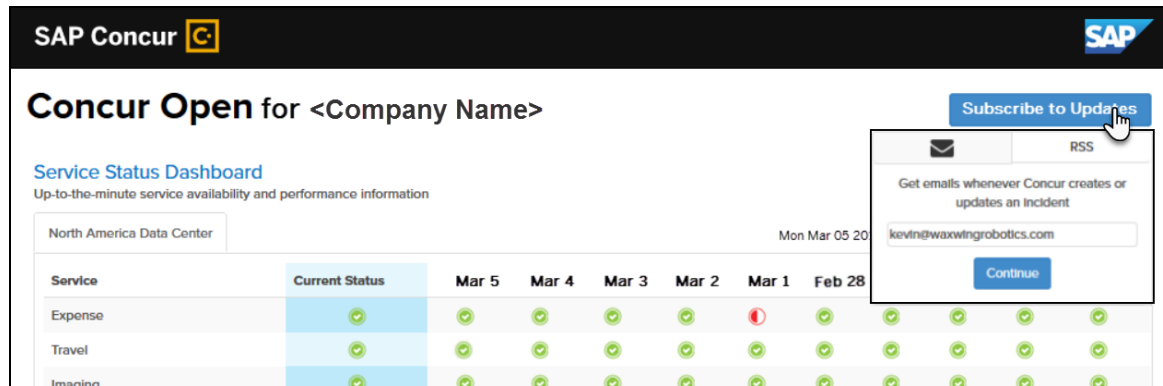
SAP Concur ROOT CAUSE ANALYSIS - OPI-00027																							
Issue Summary Issue ID: OPI-00027 Service(s): Expense Type of incident: Partial Outage Started: Feb 14 12:27 pm PT Ended: Feb 14 12:40 pm PT Concur Expense in the US data center experienced a severe performance degradation for a subset of customers. During the incident, many users either received blocking error messages or their requests timed out. Concur engineers determined this was caused by excessive pressure on a database server that hosts approximately 10% of Concur's customers. Operations and R&D engineers were engaged to resolve the issue. A batch job was identified as consuming excessive resources on the server, preventing other sessions from being able to complete in a timely manner. The batch job was terminated and service immediately returned to normal.																							
Root Cause Analysis - User processing was blocked by a poor performing batch job - The batch job consumed all the CPU cycles on a database server, preventing other sessions from being allocated the necessary resources to complete their processing																							
Corrective Actions <table border="1"> <thead> <tr> <th>Action</th> <th>Status</th> <th>ETA</th> </tr> </thead> <tbody> <tr> <td>Fix the bug that created the infinite loop and deploy to the production site</td> <td>Complete</td> <td>Feb 14, 2018</td> </tr> <tr> <td>Add this scenario to the automated testing suite</td> <td>Complete</td> <td>Feb 16, 2018</td> </tr> <tr> <td>Implement alerting to notify Operations if the job runs long and is at risk of running into business hours</td> <td>Complete</td> <td>Feb 15, 2018</td> </tr> <tr> <td>Implement alerting for all jobs to notify Operations if they are running beyond expected finish times</td> <td>Complete</td> <td>Feb 15, 2018</td> </tr> <tr> <td>Implement auto-remediation to terminate the job before it hits business hours</td> <td>In Progress</td> <td>ETA March 23, 2018</td> </tr> <tr> <td>Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions</td> <td>In Progress</td> <td>ETA March 23, 2018</td> </tr> </tbody> </table>			Action	Status	ETA	Fix the bug that created the infinite loop and deploy to the production site	Complete	Feb 14, 2018	Add this scenario to the automated testing suite	Complete	Feb 16, 2018	Implement alerting to notify Operations if the job runs long and is at risk of running into business hours	Complete	Feb 15, 2018	Implement alerting for all jobs to notify Operations if they are running beyond expected finish times	Complete	Feb 15, 2018	Implement auto-remediation to terminate the job before it hits business hours	In Progress	ETA March 23, 2018	Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions	In Progress	ETA March 23, 2018
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Implement auto-remediation to terminate for all batch jobs that can be terminated without risking data corruption or disruption to critical business transactions	In Progress	ETA March 23, 2018																					
Other notes - The batch job is a necessary part of customer reporting and must remain in place - Terminating the batch job before completion did not cause any data corruption or																							

NOTE: Be aware that the root cause PDFs will be available starting around the date that the personalized view becomes available. Though service information (start/stop dates and times, type of incident, etc.) will be provided for the activity of the past two years, the PDFs will not; they will be provided on a *go-forward* basis.

The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

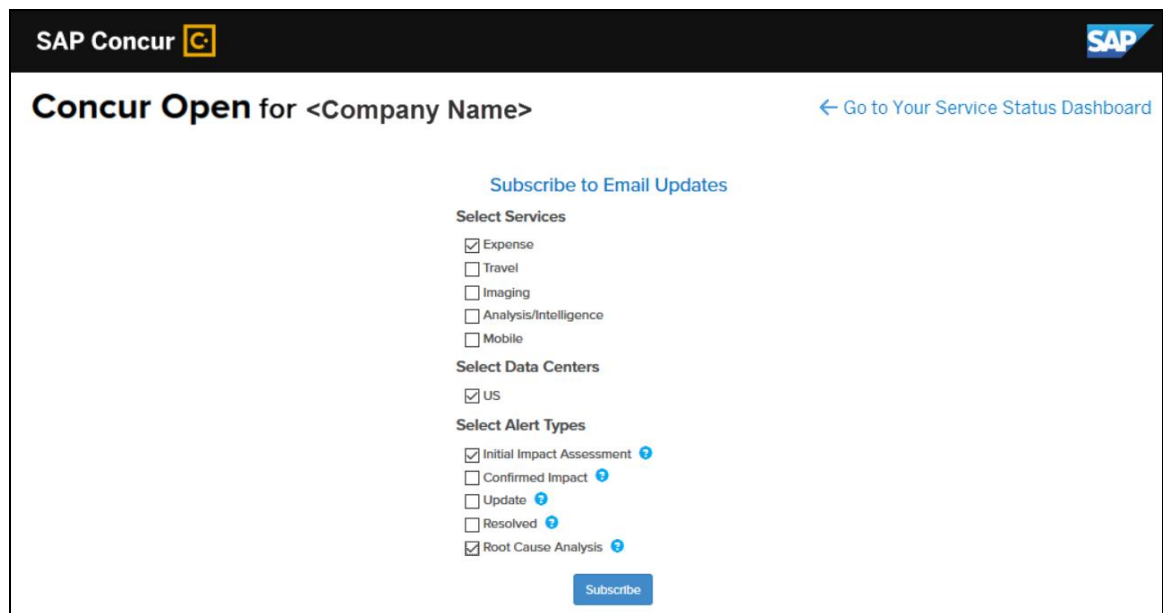
SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.

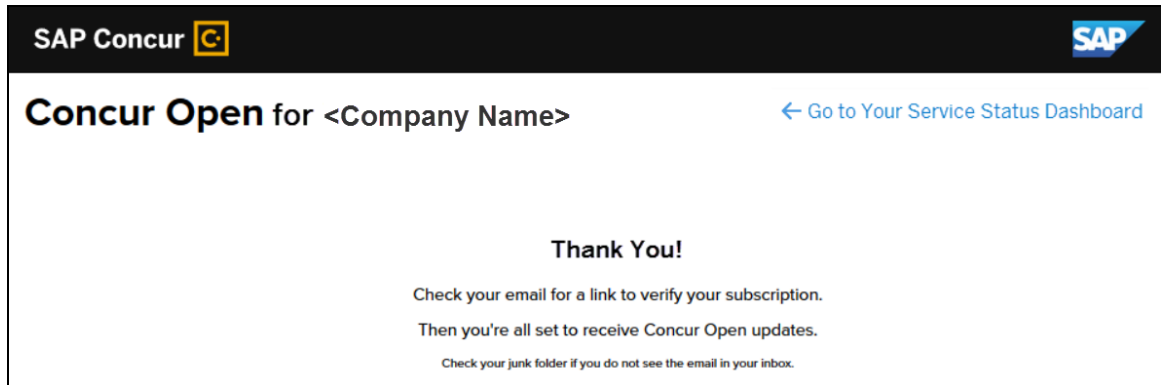


To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.

The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



More About Email Addresses in Profile

As described above, an SSO user must access the personalized view by entering their email address on the **Sign In With Concur** page and then clicking **Send a link to my email**.

Note the following:

- The user completes this process every time they want to access the personalized view.
- The email address that the user enters:
 - ◆ Must be the same as is in the **Email 1** field in their SAP Concur profile
 - ◆ Must be "verified"
 - ◆ Must be unique to that user; it cannot be shared with multiple people or logins in their company
- If an employee no longer has access to SAP Concur (for example, leaves the company), that employee can no longer access the personalized view. Remember, in order to access the personalized view, they must have a Concur login or an email address in Profile. An inactive user or terminated employee has neither of those things.

Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

For those with subscriptions **before** the release of the new Personalized Concur Open, note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:

- ◆ Set the user's new subscription to match the company's services and data center in Personalized Concur Open
- ◆ Notify the user of the change

NOTE: Best practice – after the new view is available – is to sign in to the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user's subscription will be removed from Concur Open in 30 days. These customers will be notified of this change by email.

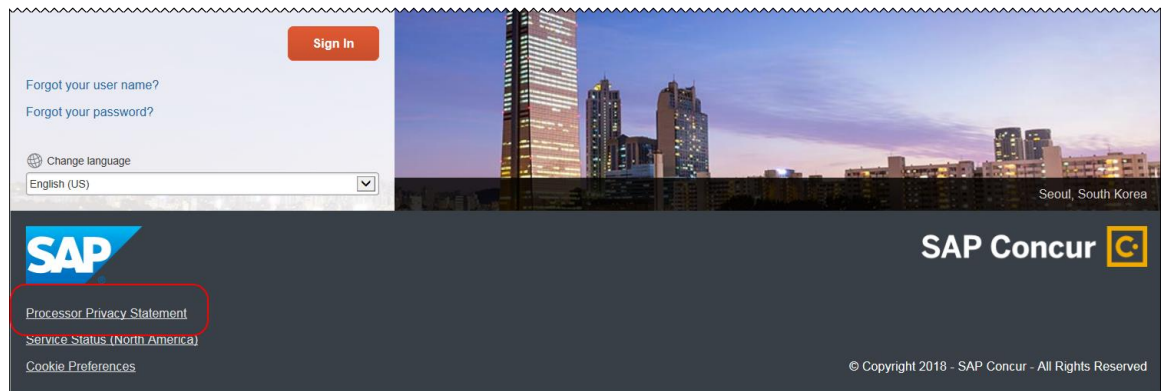
Configuration/Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Processor Privacy Statement Link in Online Help

Overview

The **Processor Privacy Statement** link is available in the SAP Concur footer.



However, not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Processor Privacy Statement** link there.

Also, with this release, the **Processor Privacy Statement** link is available in online Help.

Configuration / Feature Activation

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

Data Retention

Permission Simplification

Overview

The minimum permissions required to configure retention periods for Concur Expense have been simplified. The Expense Configuration Administrator permission is no longer required by the Data Retention feature.

Before this change, the following permissions were required:

Tab	Permission	Description
Expense	Data Retention Administrator (new role, shared)	Can view and access the Data Retention link on the Company Administration page and will receive a 72-hour confirmation email of their configuration changes.
	Expense Configuration Administrator (pre-existing role)	Can access the Administration > Company menu where the Data Retention link is located.
	Employee Administrator (pre-existing role, shared)	Can access the User Administration page where the Hold and Purge buttons are located.

After this change, the following permissions are required:

Tab	Permission	Description
Expense	Data Retention Administrator (new role, shared)	Can view and access the Data Retention link on the Company Administration page and will receive a 72-hour confirmation email of their configuration changes.
	Employee Administrator (pre-existing role, shared)	Can access the User Administration page where the Hold and Purge buttons are located.

BUSINESS PURPOSE/CLIENT BENEFIT

This change allows clients to delegate data retention configuration without conveying broader system authority.

Configuration/Feature Activation

This permission change is automatically applicable to all clients who use the Data Retention feature.

Expense Pay – Global

(Canada) Additional Card Program Now Supported for CAD

Overview

Expense Pay – Global for Expense now supports the following credit card program for the Canadian Dollar (CAD \$):

- JP Morgan Chase MasterCard CAD

BUSINESS PURPOSE / CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

These additional card program is available to reimbursement admins on the **Payment Manager > Configure Batches > Card Programs** (tab) > **Add New Card Program** page.

Add New Card Program ✕

Program Name

Payment Type

Program Type:
 [Verify IIN](#)

Currency

Active

☐ Classic ☐ Global

Configuration / Feature Activation

Concur automatically implemented this change; there are no configuration or activation steps.

Next Generation (NextGen) Expense

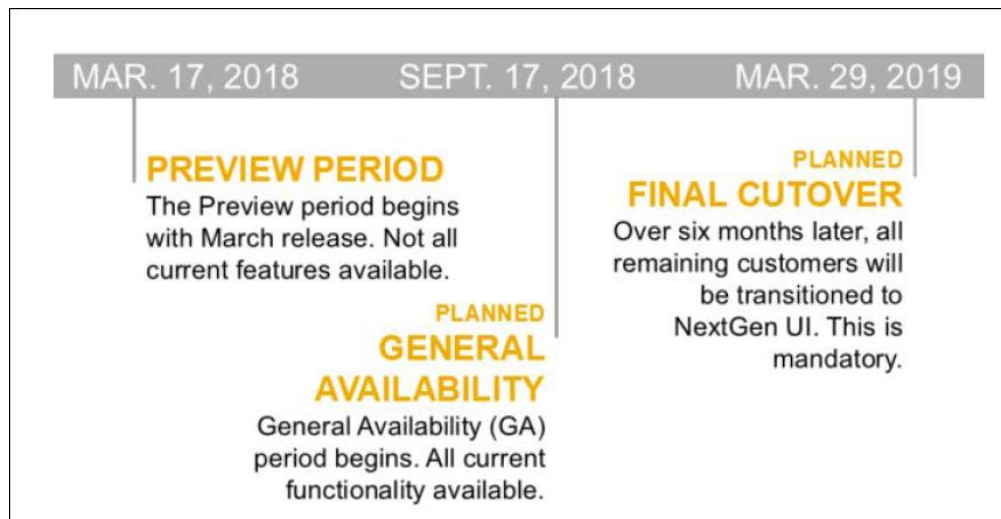
****Ongoing** New User Interface for Concur Expense End Users**

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Over the next year, customers will have the ability to preview and then opt in to NextGen Expense (as described in detail on the following pages) before the mandatory cutover date.



BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense over the next year.

- **We are currently in the Preview Period:** The Preview Period began March 17, 2018 and runs into September 2018. During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will become available about every two weeks. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability, which is planned to start in September and will last approximately 6 months (planned for March 2019). During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI on the timeline they deem most appropriate.

- **Mandatory Cutover to NextGen Expense:** On the mandatory cutover date (planned for March 29, 2019), ***all customers will be required to move to NextGen Expense.*** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Be aware that customers do not have to wait until the mandatory cutover date. In fact, customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expense Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

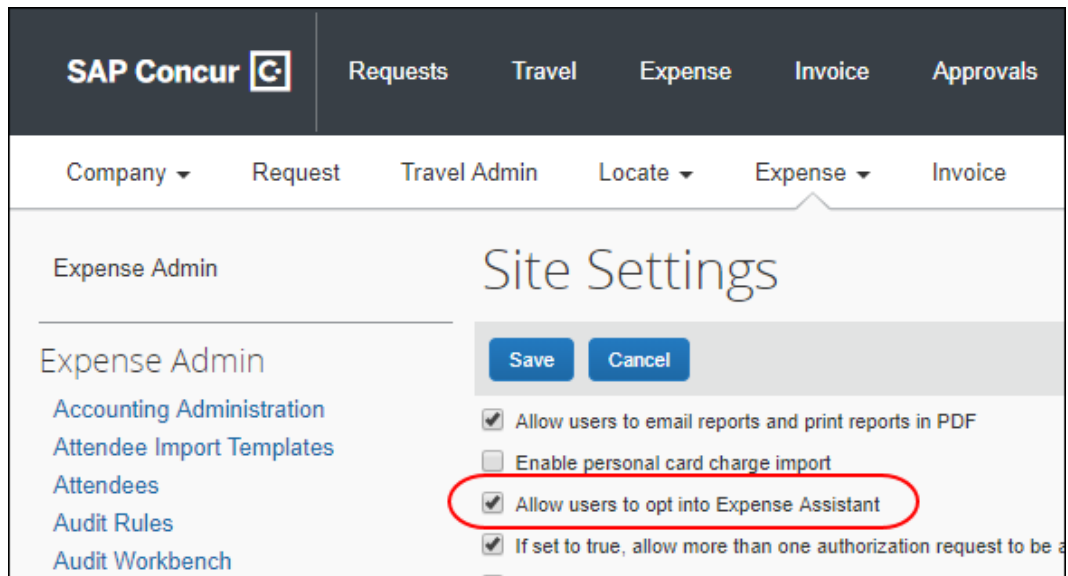
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

! IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed for the May release, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

Plain Text File Transfer Protocol (FTP)

****Planned Changes** Support for Plain Text FTP to End on September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

! IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

Uploading Receipt Images

****Planned Changes** Support for Uploading HTML Ends September 2018**

Overview

Users will no longer have the option to upload scanned images of receipts that are formatted as HTML files.

Users will continue to be able to upload receipt images that use the following file formats: PNG, JPG, JPEG, PDF, TIF, and TIFF.

BUSINESS PURPOSE/CLIENT BENEFIT

This change will allow SAP Concur to devote more resources to features that are used by many or most of our clients.

Configuration/Feature Activation

This change will be automatically available; there will be no configuration or activation steps.



For general information about uploading receipt images, refer to the *Concur's Imaging Service – Overview* Expense End User Help topic.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

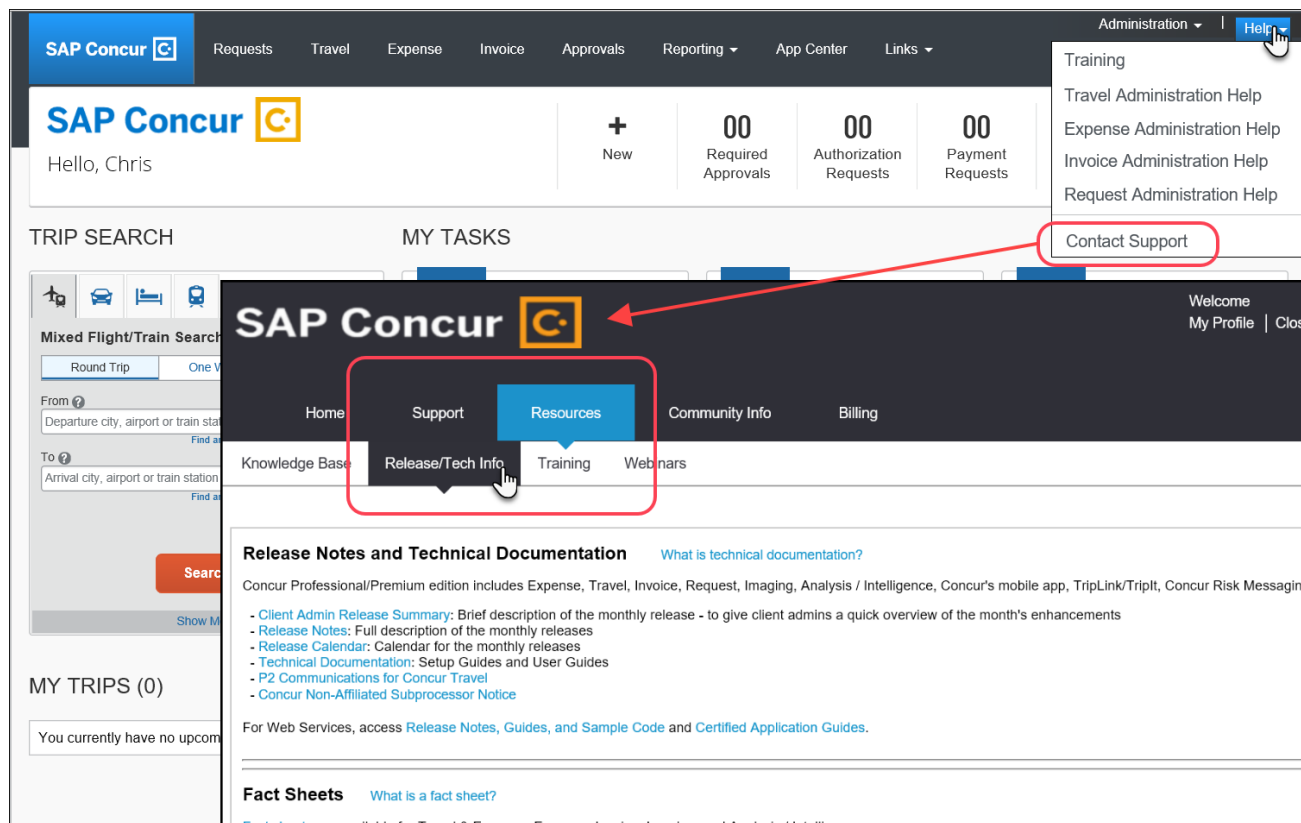
Expense Setup Guides

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



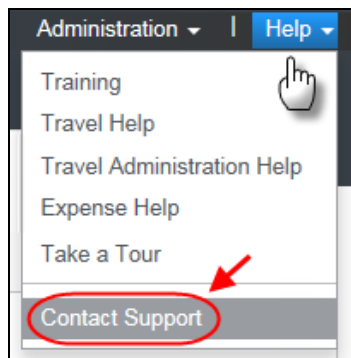
Cases

Steps for Getting a Status

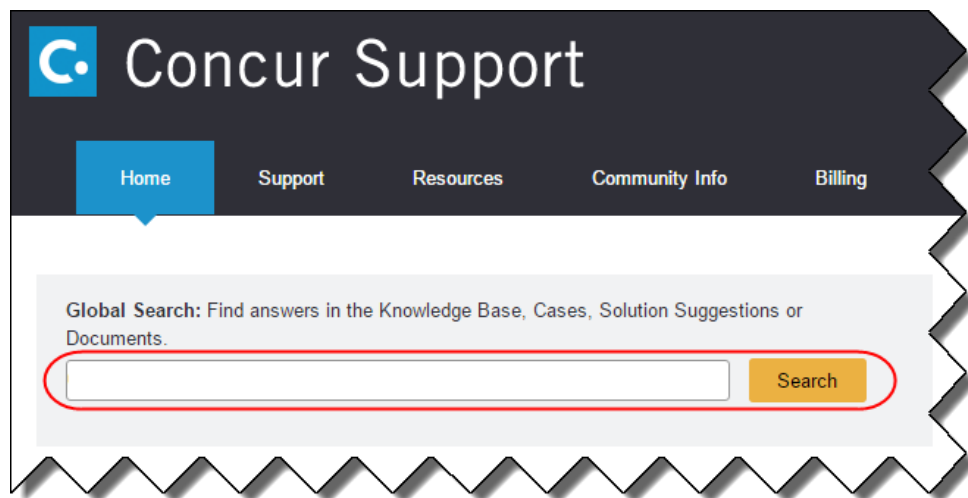
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: Aug 18, 2018 Initial Post: Friday, Aug 17, 2:00 PM PT	Client FINAL

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Release Notes

Currency Admin

New Currency Supported: Bolívar Soberano VES (Venezuela)

Overview

The Central Bank of Venezuela is carrying out a redenomination of its currency. Accordingly, SAP Concur has added support for the following new currency:

- Bolívar Soberano (VES)

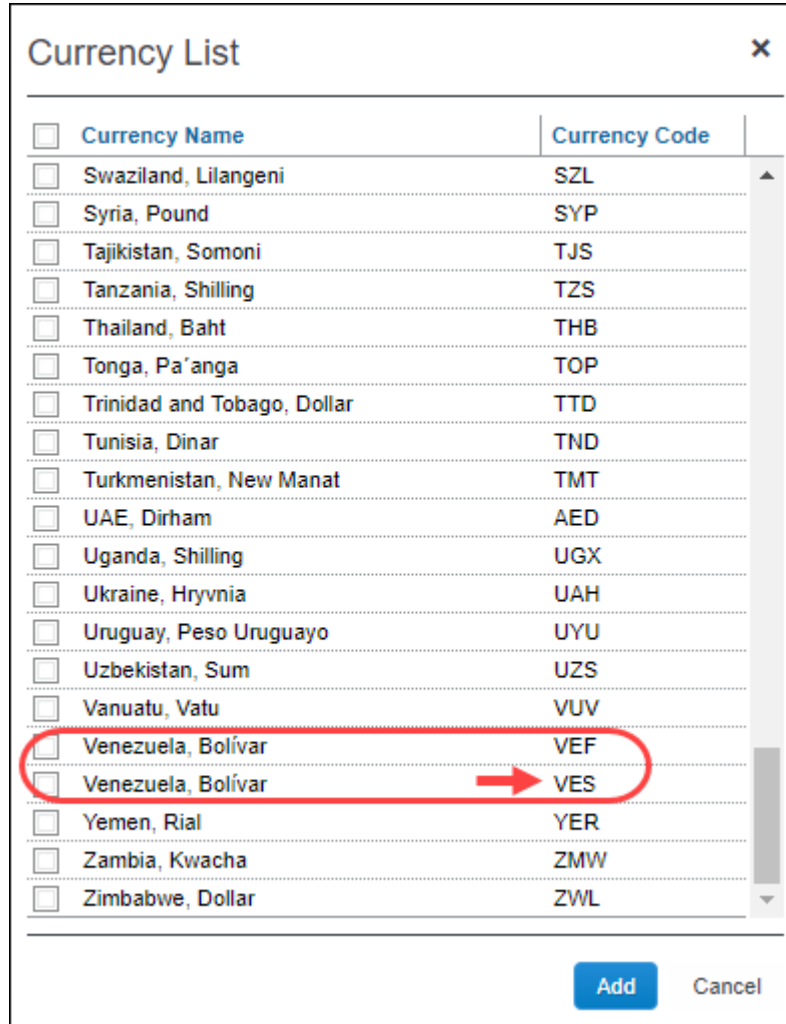
NOTE: At this time, Concur continues to support Bolívar Fuerte (VEF). Both currencies will be available until such time as the Bolívar Fuerte is withdrawn as legal tender.

BUSINESS PURPOSE / CLIENT BENEFIT

This change supports SAP Concur customers who use the Bolívar currency.

What the Admin Sees

On the **Currency List**, admins now see **Venezuela Bolívar VES**. To access the **Currency List** page, click **Administration > Expense > Currency Admin > Reimbursement Currencies** (tab) > **Add Currency** (button).



☐ Currency Name	Currency Code
☐ Swaziland, Lilangeni	SZL
☐ Syria, Pound	SYP
☐ Tajikistan, Somoni	TJS
☐ Tanzania, Shilling	TZS
☐ Thailand, Baht	THB
☐ Tonga, Pa'anga	TOP
☐ Trinidad and Tobago, Dollar	TTD
☐ Tunisia, Dinar	TND
☐ Turkmenistan, New Manat	TMT
☐ UAE, Dirham	AED
☐ Uganda, Shilling	UGX
☐ Ukraine, Hryvnia	UAH
☐ Uruguay, Peso Uruguayo	UYU
☐ Uzbekistan, Sum	UZS
☐ Vanuatu, Vatu	VUV
☐ Venezuela, Bolívar	VEF
☐ Venezuela, Bolívar	VES
☐ Yemen, Rial	YER
☐ Zambia, Kwacha	ZMW
☐ Zimbabwe, Dollar	ZWL

Configuration/Feature Activation

The new currency is automatically available for selection on an expense and for activation as a reimbursement currency; there are no additional configuration or activation steps.

NOTE: Clients should work directly with their internal IT/Finance teams for when to reassign employees currently reimbursed in Venezuela Bolívar Fuerte (VEF) to the new Venezuela Bolívar Soberano (VES).



For general information about this functionality, refer to the *Expense: Currency Admin Setup Guide*.

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE / CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

****Ongoing** New User Interface for Concur Expense End Users**

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense.

- **We are currently in the Preview Period:** During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will continue to become available. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense: All customers will be required to move to NextGen Expense.** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Plain Text FTP

Support for Plain Text FTP to End on **September 1st, 2018**

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

! IMPORTANT: SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. **There will be no extensions beyond this date.**

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. **There will be no exceptions beyond September 1st, 2018.**

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)

- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

SAP Concur's Platform

Callout Server Requirements Update

Overview

SAP Concur is upgrading the servers that support the SAP Concur Platform Callouts. This maintenance includes the Production Proxy Migration and PWS Server Migration to VM.

The North American Data Center update has been completed. The EMEA Data Center PWS Server Migration to VM is completed, and the Production Proxy Migration is estimated to be completed on October 31, 2018.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.

- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.

! IMPORTANT: If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE / CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur is automatically implementing these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expense Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

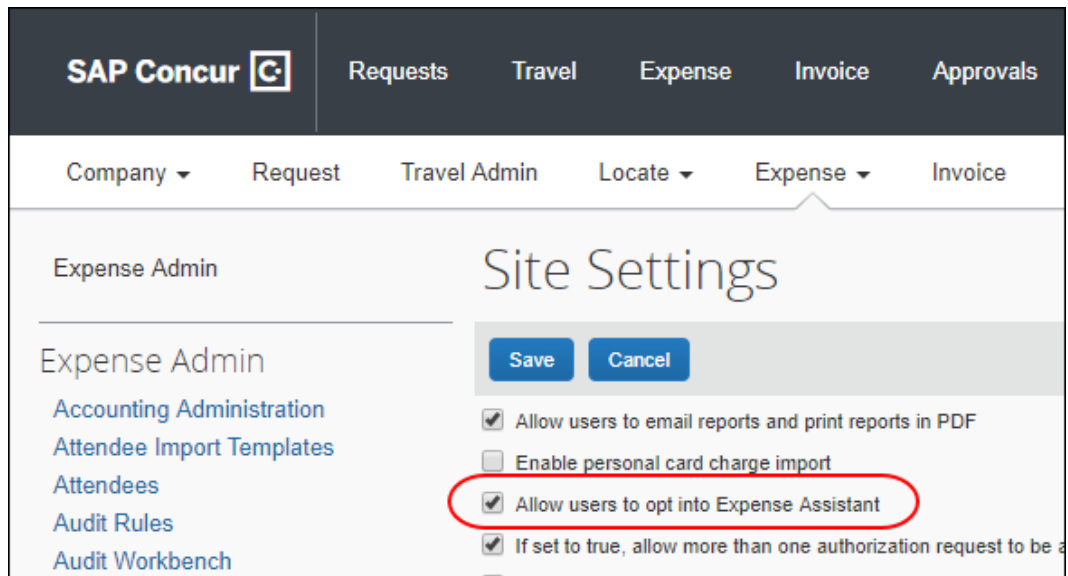
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

! IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

****Planned Changes** Personalized Concur Open**

Overview

Concur Open is the SAP Concur service status dashboard, which displays known and widespread outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

In a future release, there will be new functionality added to Concur Open. Users can continue to access Concur Open and view Concur service availability; no functionality will be removed. However, with the release, SAP Concur users will be able to log in to Concur Open and:

- View service status for the services and the data center that are *specific to their company*
- Access subscription options for updates about the incidents that impact the services *specific to their company*
- View service history for the past two years as well as detailed root cause analysis information and the actions taken by SAP Concur for specific incidents

BUSINESS PURPOSE / CLIENT BENEFIT

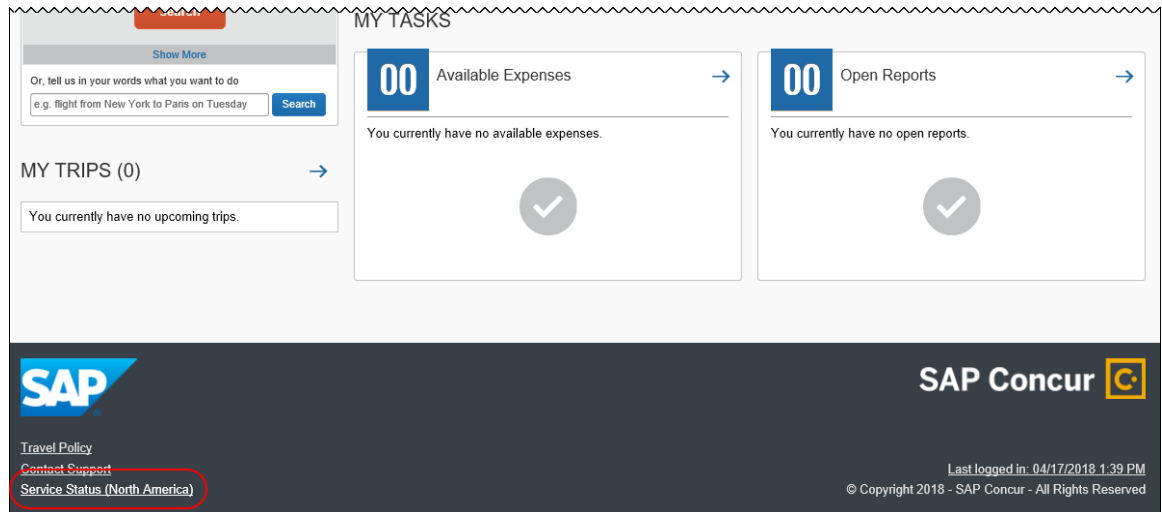
Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding the new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

Users can access Concur Open two ways:

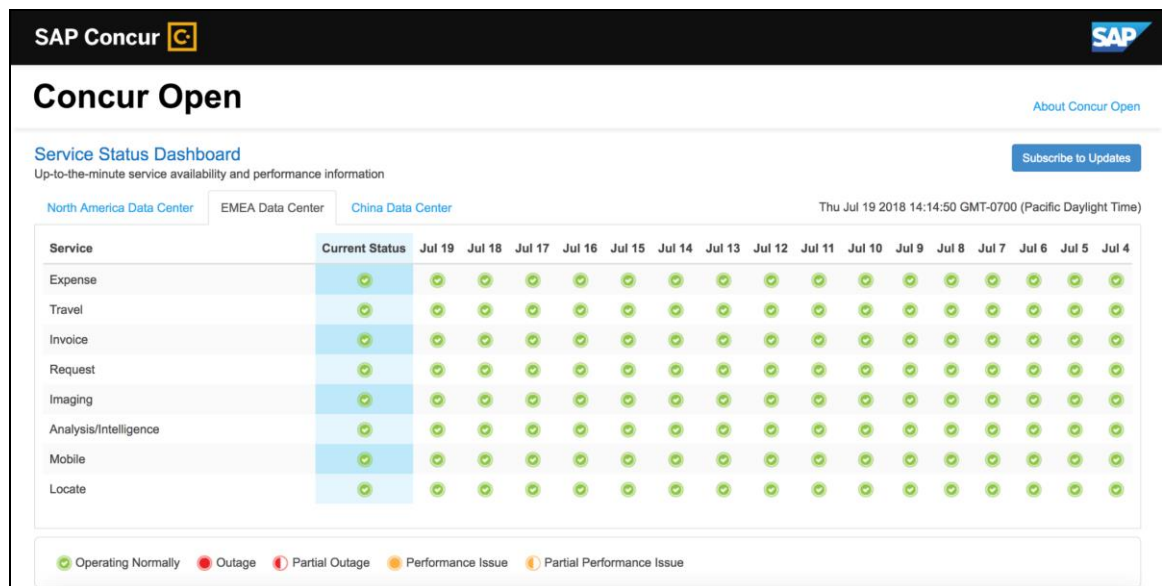
- Enter the public site directly using <https://open.concur.com>
- or –**

- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



Concur Open appears.

What the User Sees – Current View



Currently, the user sees all data center tabs, the service activity (up to the previous 20 days), and the "service" legend (bottom of the page).

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center | **EMEA Data Center** | China Data Center

Tue Jul 17 2018 14:59:57 GMT-0700 (Pacific Daylight Time)

Service	Current Status	Jul 17	Jul 16	Jul 15	Jul 14	Jul 13	Jul 12	Jul 11	Jul 10	Jul 9	Jul 8	Jul 7	Jul 6	Jul 5	Jul 4	Jul 3	Jul 2	Jul 1	Jun 30
Expense	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Travel	Partial Outage	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Invoice	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Request	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Imaging	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Analysis/Intelligence	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mobile	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Locate	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Compleat (TMC Services)	Operating Normally	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Operating Normally
Outage
Partial Outage
Performance Issue
Partial P

SAP Concur

Concur Open

[Back to Concur Open](#)

Partial Outage Issue

Services affected: Travel

OPI-1861986

Started: Fri Jul 13 11:35 am PT
Ended: Fri Jul 13 11:59 am PT

Root Cause Analysis Tue Jul 17 12:41 pm PT
At 11:06 AM PT, on 13 July 2018, The Operations Team was alerted to an approximate 25% drop in overall logins, which Services, as well as the Mobile Application. The incident caused a Partial Outage to these Services resulting in a user exp unable to Search or Book Travel and Submit Expense Reports and Invoices. The issue did not affect standard login via Co group of Application Servers that were inadvertently removed from operation and was resolved by placing the Servers bac discovery revealed the primary root cause of the Incident to be planned maintenance that resulted in an existing set of App mitigation for this maintenance, to ensure Application Servers were always active, had been incorrectly applied which res these servers are never removed from active operation.

Resolved Fri Jul 13 12:36 pm PT
We have resolved the issue and will provide the root cause analysis as soon as possible.

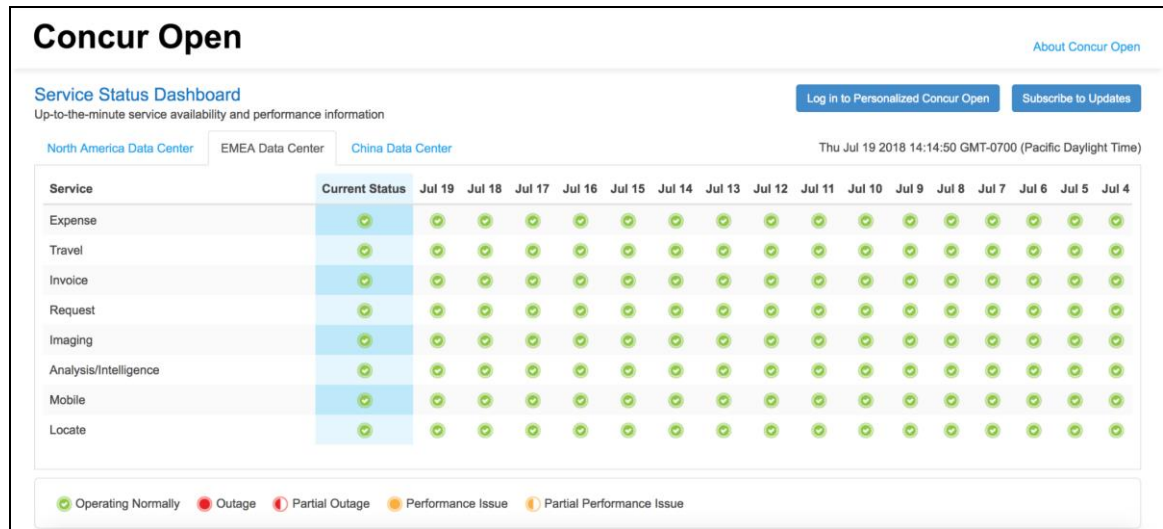
The user can click an icon to review information about service activity.

The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New View and Process

The user will access Concur Open the same way they do now – either via the public site (open.concur.com) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.



On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button – just like they currently do. In fact, that will not change – anyone can access the public version (open.concur.com) and anyone can request notifications.

With the release of Personalized Concur Open, the main change is that the **Log in to Personalized Concur Open** button also appears on the main page. Whether the user accesses Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

- For customers who do not use SSO, users sign in with their SAP Concur username and password.
- For customers who do use SSO, users can access the personalized view using their email address (described below).

On the main page, the user clicks the **Log in to Personalized Concur Open** button. The **Sign In With Concur** page appears.

Click to expand the list.'"/>

SAP Concur  

Sign In With Concur

☐ Send a link to my email

☒ Username

Continue

By signing in you are authorizing Concur Open to perform the following on your behalf. [Click to expand the list.](#)

Then, depending on the customer's implementation of SAP Concur:

- **Username and password:** If the user signs in to SAP Concur using username and password:

SAP Concur  

Sign In With Concur

user@company.com

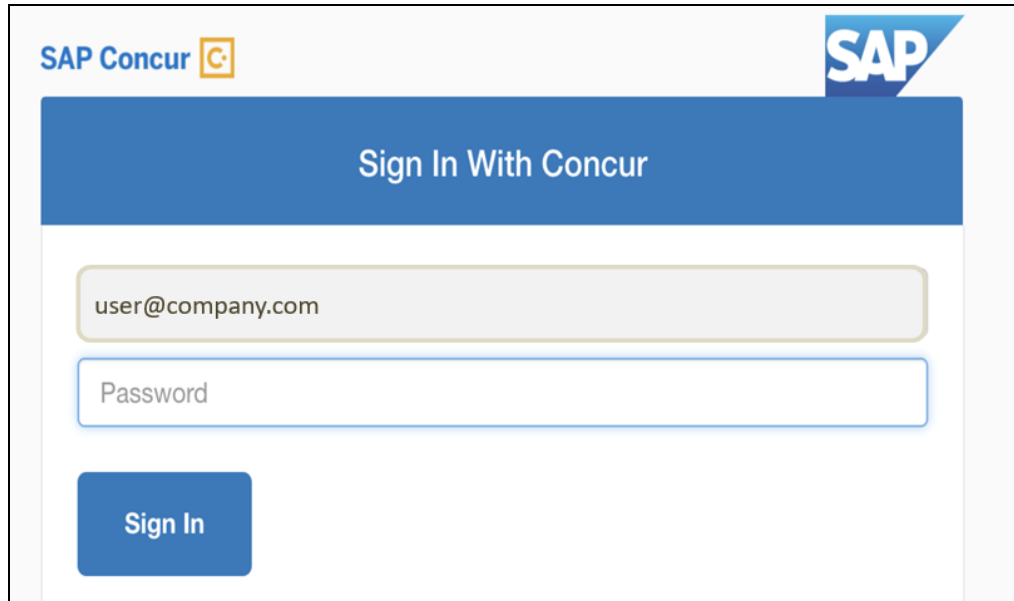
☐ Send a link to my email

☒ Username

Continue

By signing in you are authorizing Concur Open to perform the following on your behalf. [Click to expand the list.](#)

Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**. This page appears.



The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:

Click to expand the list.'" data-bbox="260 517 881 836"/>

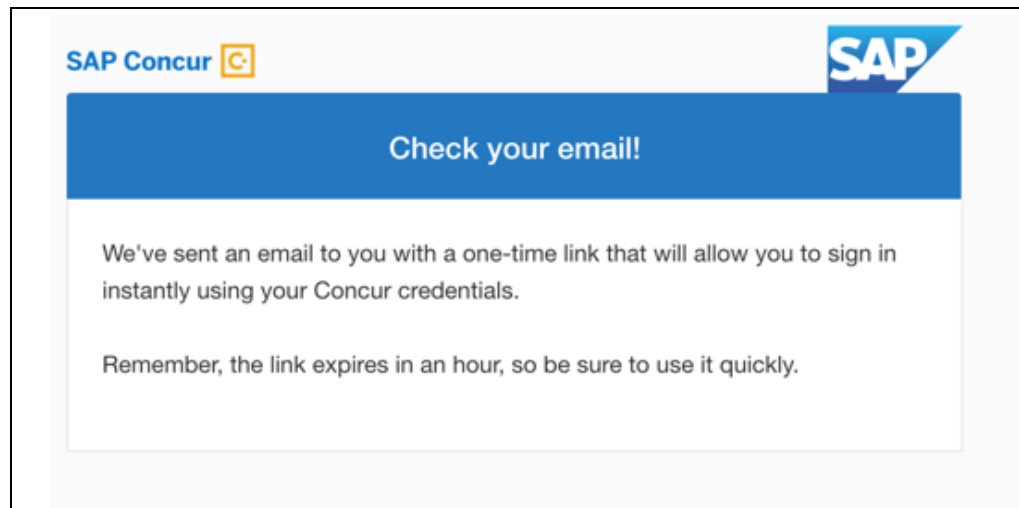
Then, on this page, the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.

SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

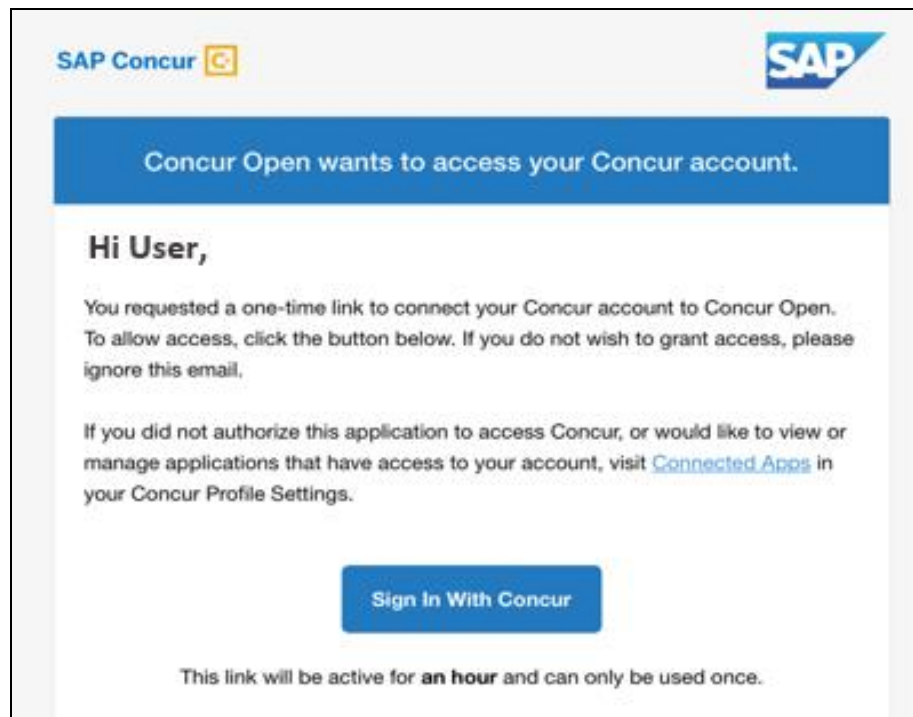


Refer to *More About Email Addresses in Profile* for more detail.

This message appears:



An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. The user is then directed to the personalized view.

NOTE: The **one-time** link is active for **one hour**.

Once signed in, the personalized **Service Status Dashboard** page appears.

SAP Concur  **SAP**

Personalized Concur Open for <Company Name>

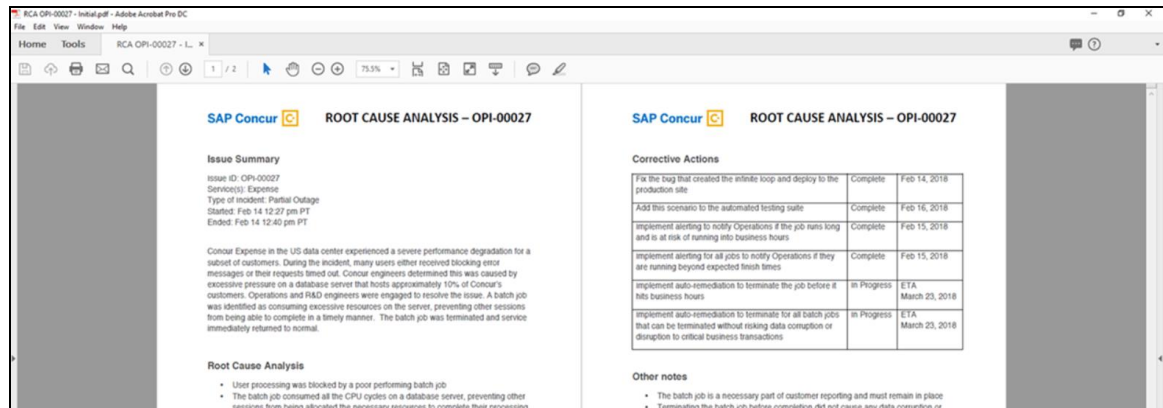
Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center Tue Jul 31 2018 10:06:00 GMT-0700 (Pacific Daylight Time)

Service **Current Status** Jul 31 Jul 30 Jul 29 Jul 28 Jul 27 Jul 26 Jul 25 Jul 24 Jul 23 Jul 22 Jul 21 Jul 20 Jul 19 Jul 18 Jul 17 Jul 16 Jul 15

Expense               

The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for specific incidents.

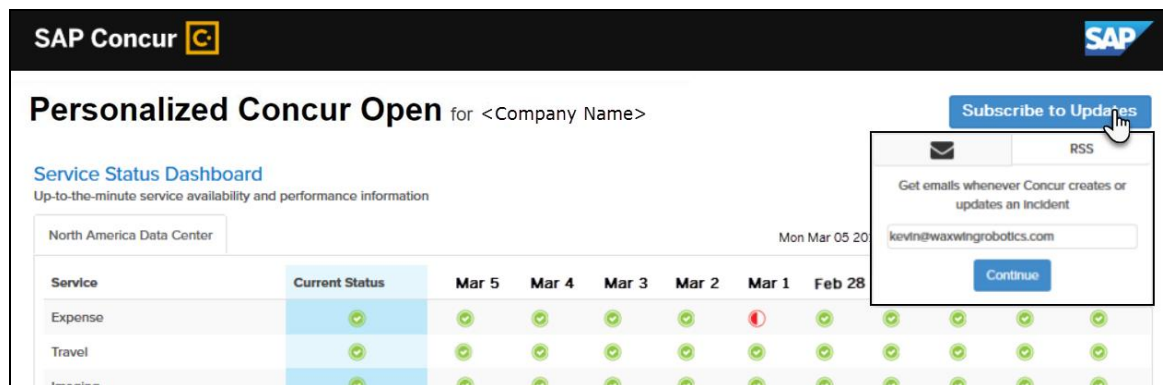


NOTE: Be aware that the root cause PDFs will be available starting around the date that the personalized view becomes available. Though service information (start/stop dates and times, type of incident, etc.) will be provided for the activity of the past two years, the PDFs will not; they will be provided on a *go-forward* basis.

The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.



To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.

The user clicks **Continue**. This page appears.

SAP Concur  

Personalized Concur Open for <Company Name> [← Go to Your Service Status Dashboard](#)

[Subscribe to Email Updates](#)

Select Services

- ☒ Expense
- ☐ Travel
- ☐ Imaging
- ☐ Analysis/Intelligence
- ☐ Mobile

Select Data Centers

- ☒ US

Select Alert Types

- ☒ Initial Impact Assessment 
- ☐ Confirmed Impact 
- ☐ Update 
- ☐ Resolved 
- ☒ Root Cause Analysis 

[Subscribe](#)

The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.

SAP Concur  

Personalized Concur Open for <Company Name> [← Go to Your Service Status Dashboard](#)

Thank You!

Check your email for a link to verify your subscription.

Then you're all set to receive Concur Open updates.

Check your junk folder if you do not see the email in your inbox.

User Remains Signed In

The user automatically remains signed in for seven days. In that seven-day period, whether the user enters directly (using <https://open.concur.com>) or they click **Service Status** in the lower-left corner of the SAP Concur screen, they are directed to the generic Concur Open page. When they click **Log in to Personalized Concur Open**, users bypass the login page and go directly to the **Personalized Concur Open** page.

If, during the seven-day period, the user wants to log out, they click **Log Out** on the **Service Status Dashboard** page.

More About Email Addresses in Profile

As described above, an SSO user must access the personalized view by entering their email address on the **Sign In With Concur** page and then clicking **Send a link to my email**.

Note the following:

- The email address that the user enters:
 - ♦ Must match the email address in the **Email 1** field in their SAP Concur profile; Email 1 must be "verified"
 - ♦ Must be unique to that user; it cannot be shared with multiple people or logins in their company
- If an employee no longer has access to SAP Concur (for example, leaves the company), that employee can no longer access the personalized view. Remember, in order to access the personalized view, they must have a Concur login or an email address in Profile. An inactive user or terminated employee has neither of those things.

Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

For those with subscriptions **before** the release of the new Personalized Concur Open, note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
 - ♦ Set the user's new subscription to match the company's services and data center in Personalized Concur Open
 - ♦ Notify the user of the change

NOTE: Best practice – after the new view is available – is to sign in to the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user's subscription will be removed from Concur Open in 30 days. These customers will be notified of this change by email.

Configuration/Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Uploading Receipt Images

****Planned Changes** Support for Uploading HTML Ends September 15th, 2018**

Overview

Users will no longer have the option to upload scanned images of receipts that are formatted as HTML files.

Users will continue to be able to upload receipt images that use the following file formats: PNG, JPG, JPEG, PDF, TIF, and TIFF.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will close a security gap and allow SAP Concur to devote more resources to features that are used by many or most of our clients.

Configuration/Feature Activation

This change will be automatically available; there will be no configuration or activation steps.



For general information about uploading receipt images, refer to the *Concur's Imaging Service – Overview* Expense End User Help topic.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

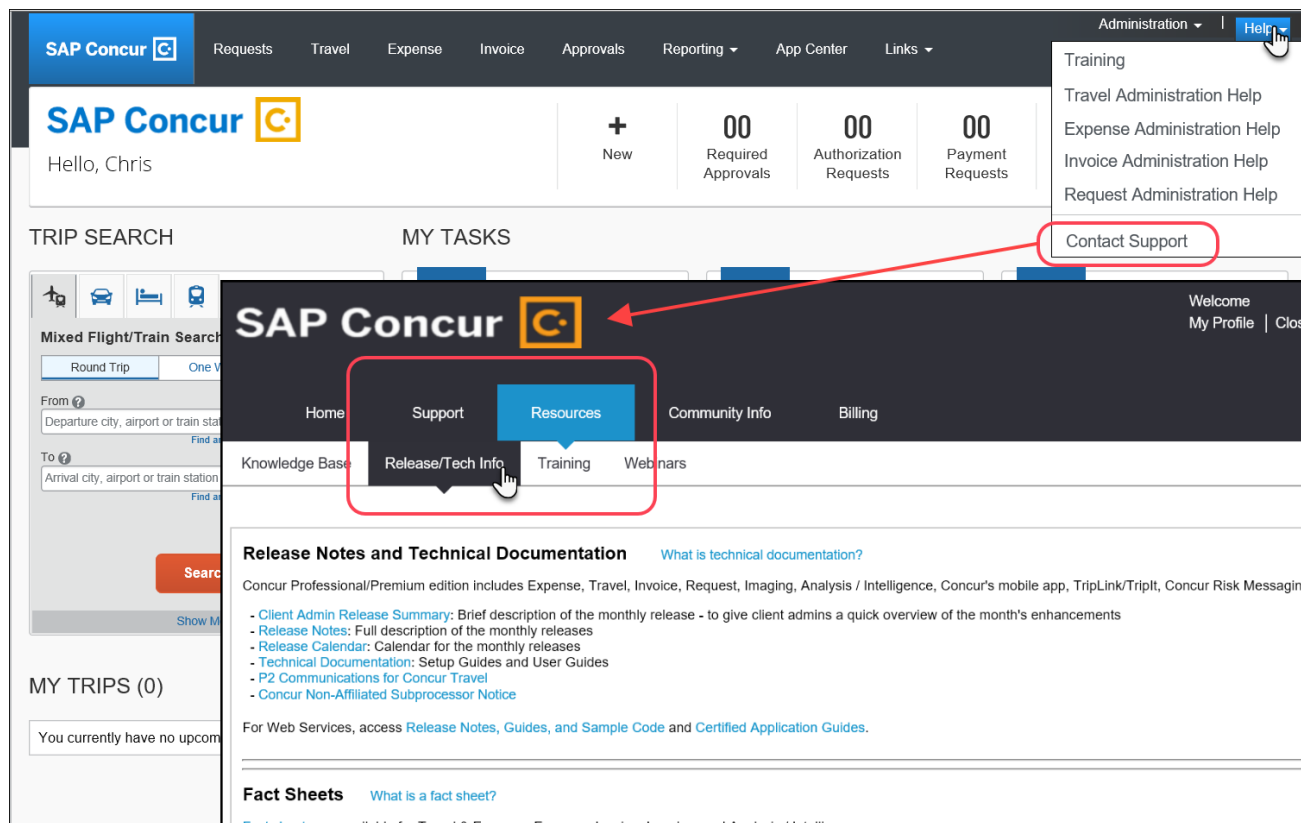
Expense Setup Guides

Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



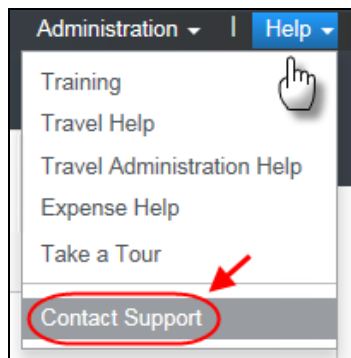
Cases

Steps for Getting a Status

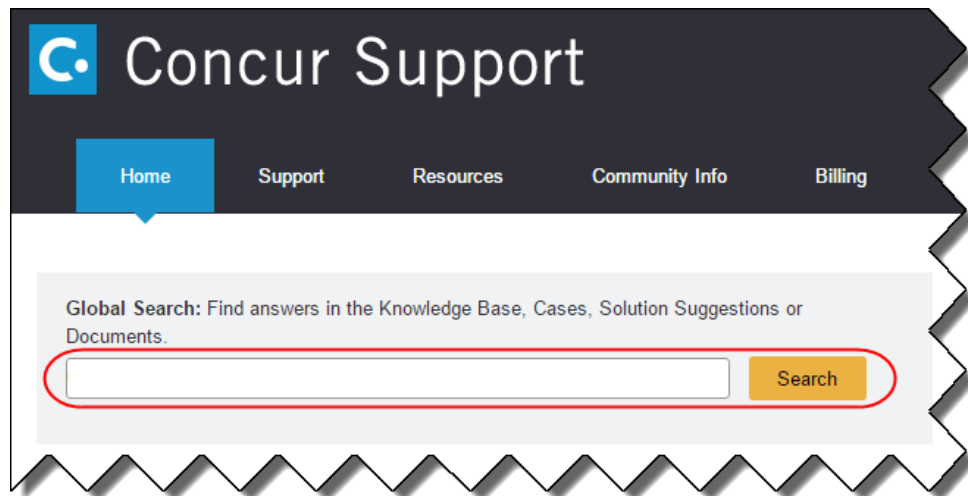
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: Sep 22, 2018 Initial Post: Friday, Sep 21, 9:00 AM PT	Client FINAL

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Release Notes

Admin

(Japan) New Role Required to Access the E-Bunsho Timestamp Validation Tool

Overview

For companies who use the e-Bunsho feature, a new administrative role has been added to Concur. The new role, *Digital Compliance Administrator*, enables a user to access the **E-Bunsho Timestamp** validation tool.

 **IMPORTANT:** Continued access to the validation tool requires this new role.

BEFORE

For companies who have enabled the e-Bunsho feature, the tool was available to admins who had at least one of these processor roles:

- Expense Processor
- Expense Processor (Audit)
- Expense Processor Manager

AFTER

Now, admins no longer need one of the previously mentioned processor roles.

BUSINESS PURPOSE / CLIENT BENEFIT

This change allows company admins to access the page.

What the Admin See

In **Administration > Company > Company Admin > User Permissions**, the new *Digital Compliance Administrator* role displays.

Configuration / Feature Activation

The new role is automatically available; but must be assigned to at least one user.



For more information, refer to the *Expense: Receipt Handling – Uploaded and Emailed Images Setup Guide* and the *Shared: User Administration User Guide*.

Personalized Concur Open

Overview

Concur Open is the SAP Concur service status dashboard, which displays known and widespread outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

Personalized Concur Open became available on September 11.

With the release, there will be new functionality added to Concur Open. SAP Concur users will be able to log in to a personalized view of Concur Open and:

- View service status for the services and the data center that are *specific to their company*
- Access subscription options for updates about the incidents that impact the services *specific to their company*

- View service history for the past two years as well as detailed root cause analysis information and the actions taken by SAP Concur for specific incidents

NOTE: Personalized Concur Open will be available ***in addition to*** Concur Open. Users can continue to access Concur Open and view service availability.

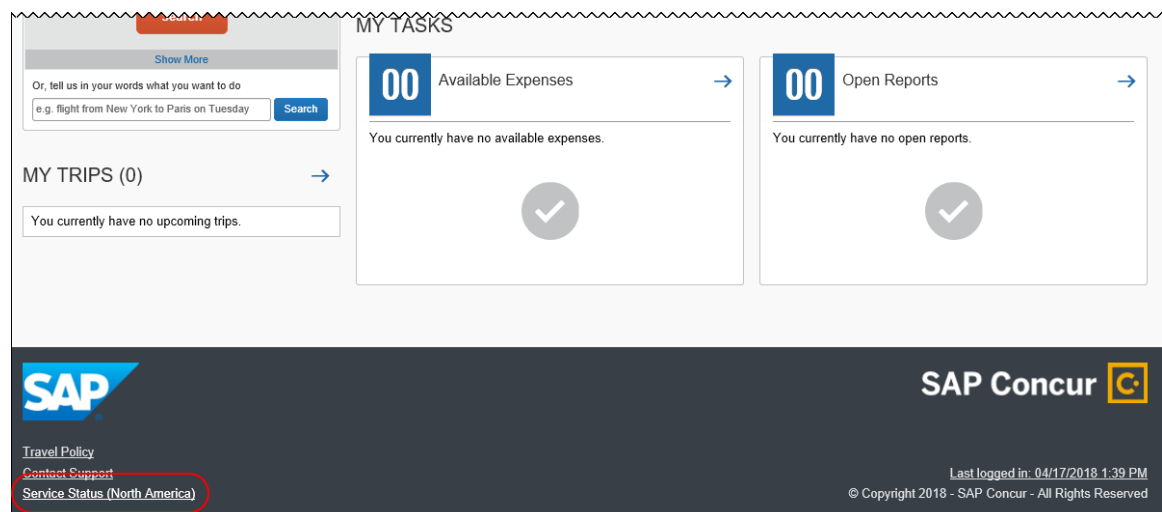
BUSINESS PURPOSE/CLIENT BENEFIT

Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding the new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

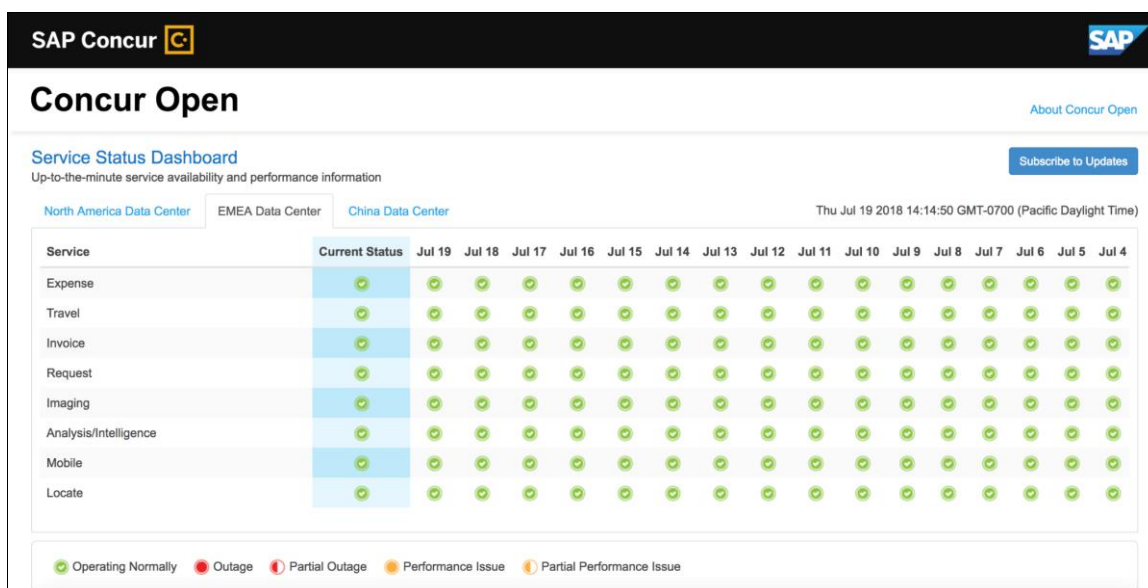
Users can access Concur Open two ways:

- Enter the public site directly using <https://open.concur.com>
– **or** –
- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



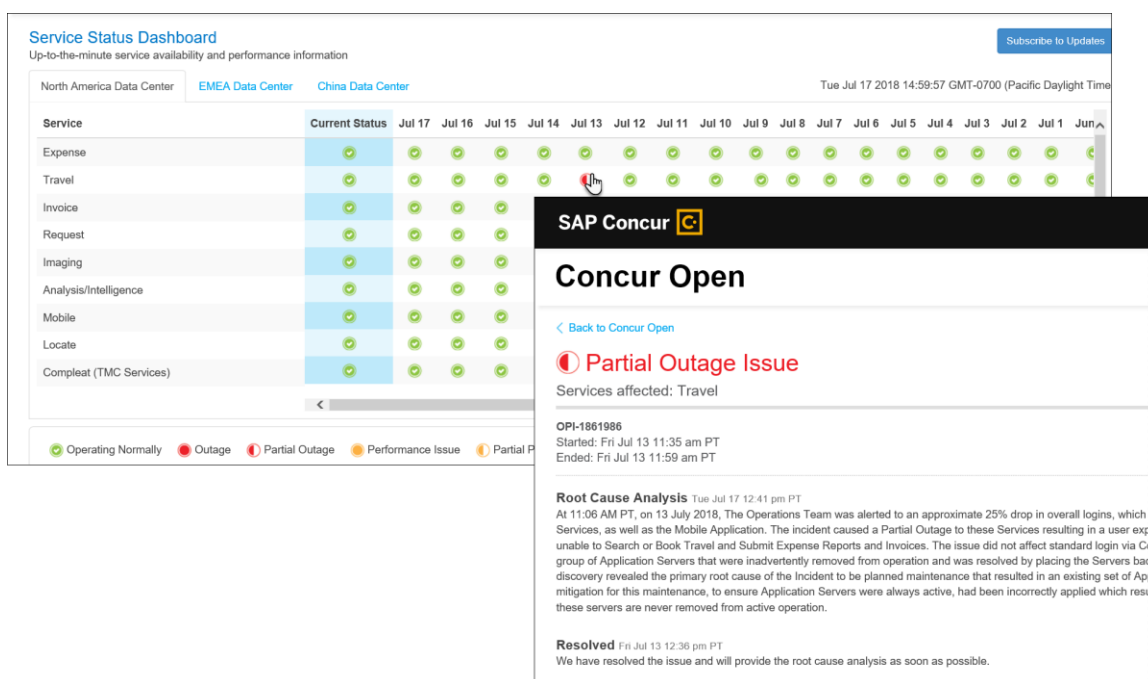
Concur Open appears.

What the User Sees – Current View, Concur Open



In Concur Open, the user sees all data center tabs, the service activity (up to the previous 20 days), and the "service" legend (bottom of the page).

The user can click an icon to review information about service activity.

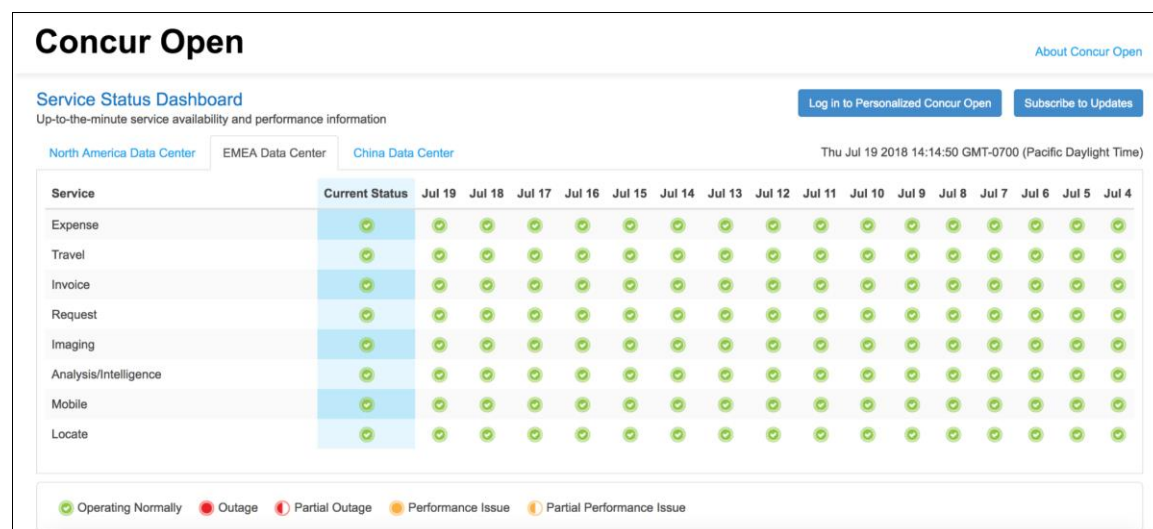


The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New Personalized View and Process

The user will access Concur Open the same way they do now – either via the public site (<https://open.concur.com>) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.



On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button – just like they currently do.

With the release of Personalized Concur Open, the main change is that the **Log in to Personalized Concur Open** button also appears on the main page. Whether the user accesses Open via the public site (<https://open.concur.com>) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

SIGN IN TO THE PERSONALIZED VIEW

NOTE: Initially, please use Internet Explorer, Chrome, or Firefox. Safari will be available later.

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

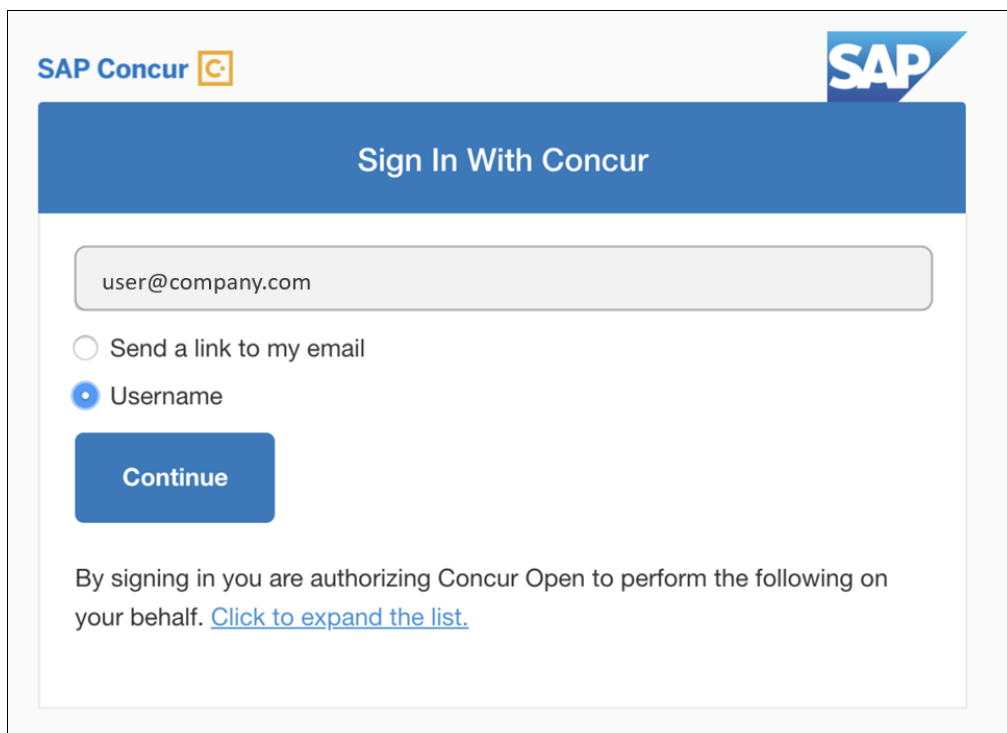
- For customers who do **not** use SSO, users sign in with their SAP Concur username and password.
- For customers who do use SSO, users can access the personalized view using their email address (described below).

On the main page, the user clicks the **Log in to Personalized Concur Open** button. The **Sign In With Concur** page appears.

Click to expand the list.'"/>

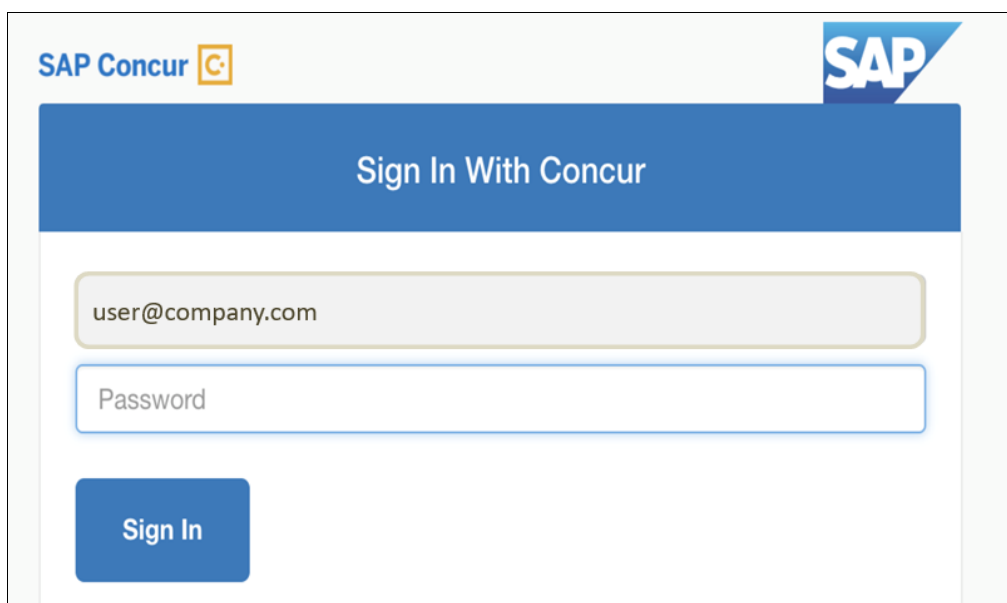
Then, depending on the user's normal sign-in procedure:

- **Username and password:** If the user normally signs in to SAP Concur using their username and password, then – on this page – the user enters their username, clicks **Username** (if necessary), and clicks **Continue**.



The screenshot shows the 'Sign In With Concur' page. At the top left is the 'SAP Concur' logo, and at the top right is the 'SAP' logo. Below the logos is a blue header bar with the text 'Sign In With Concur'. Underneath the header bar is a text input field containing 'user@company.com'. Below the input field are two radio button options: 'Send a link to my email' (unselected) and 'Username' (selected). Below the radio buttons is a blue 'Continue' button. At the bottom of the form, there is a message: 'By signing in you are authorizing Concur Open to perform the following on your behalf. [Click to expand the list.](#)'

This page appears.



The screenshot shows the 'Sign In With Concur' page. At the top left is the 'SAP Concur' logo, and at the top right is the 'SAP' logo. Below the logos is a blue header bar with the text 'Sign In With Concur'. Underneath the header bar is a text input field containing 'user@company.com'. Below the input field is a password input field labeled 'Password'. Below the password field is a blue 'Sign In' button.

The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.



Refer to *User Remains Signed In* for additional information.

- **SSO:** If the user does not know their SAP Concur sign-in credentials (for example, the user's company uses SSO to access SAP Concur services), then – on this page – the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.

Click to expand the list.'"/>

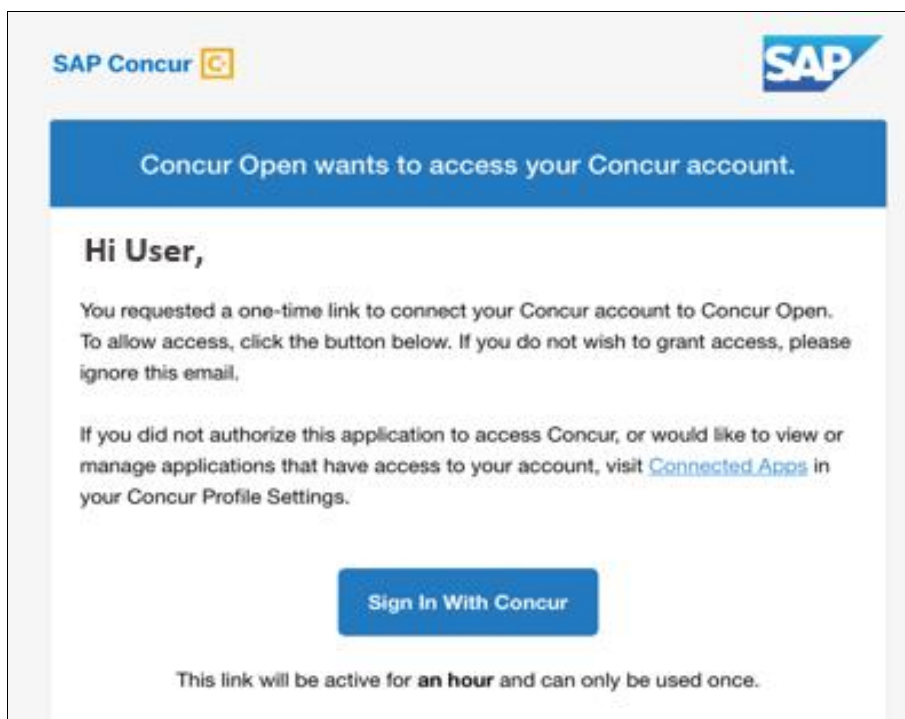
SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.



Refer to *SSO – More About Email Addresses in Profile* for more detail.

This message appears.

An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. The user is then directed to the personalized view.

NOTE: The **one-time** link is active for **one hour**. If the user does not click the link within an hour of it being generated, then the user must request another token.



Refer to *User Remains Signed In* for additional information.

Once signed in, the personalized **Service Status Dashboard** page appears.

SAP Concur

Personalized Concur Open for <Company Name>

Service Status Dashboard
Up-to-the-minute service availability and performance information

North America Data Center Tue Jul 31 2018 10:06:00 GMT-0700 (Pacific Daylight Time)

[Log Out](#) [Subscribe to Updates](#)

Service	Current Status	Jul 31	Jul 30	Jul 29	Jul 28	Jul 27	Jul 26	Jul 25	Jul 24	Jul 23	Jul 22	Jul 21	Jul 20	Jul 19	Jul 18	Jul 17	Jul 16	Jul 15
Expense																		
Travel																		
Invoice																		
Request																		
Imaging																		
Analysis/Intelligence																		
Mobile																		
Locate																		

Operating Normally Outage Partial Outage Performance Issue Partial Performance Issue

[View Service Status History](#)

On this page, the user can:

- View:
 - ♦ **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes **only** those that the user's company uses.
 - ♦ **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company.
- Subscribe to updates

VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.

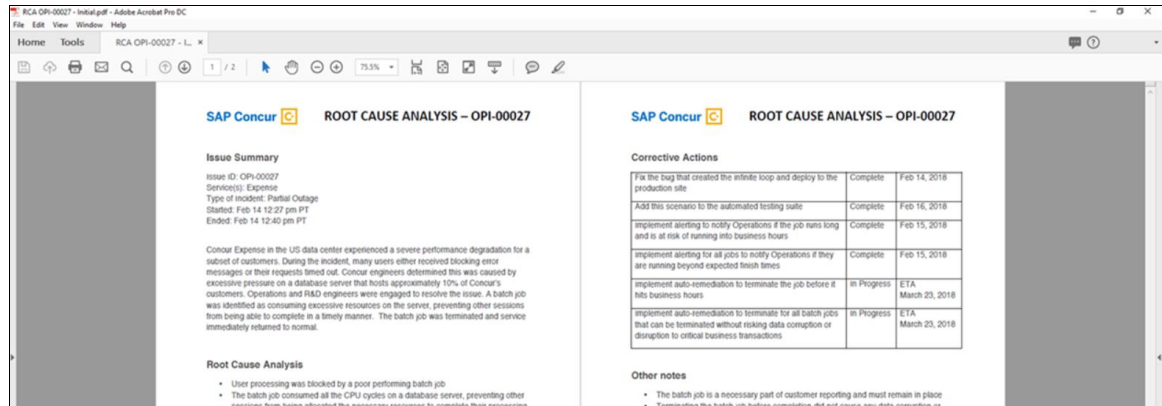
SAP Concur

Personalized Concur Open for <Company Name> [Go to Your Service Status Dashboard](#)

Service Status History Dashboard

OPI Number	Service(s)	Type of Incident	Started	Ended	Detailed Root Cause Analysis
OPI-00036	Expense	Partial Outage	Mar 01 2018 06:20 am PT	Mar 01 2018 06:23 am PT	RCA-In Progress
OPI-00027	Travel	Partial Outage	Feb 14 2018 12:27 pm PT	Feb 14 2018 12:40 pm PT	RCA-Final
OPI-00025	Expense, Travel, Mobile	Partial Outage	Jan 05 2018 01:46 am PT	Jan 05 2018 02:01 am PT	RCA-Final
OPI-00019	Travel	Partial Performance	Dec 21 2017 07:30 am PT	Dec 21 2017 07:42 am PT	RCA-Final
OPI-00007	Expense	Partial Outage	Nov 14 2017 09:03 pm PT	Nov 14 2017 09:09 pm PT	RCA-Final

The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for specific incidents.

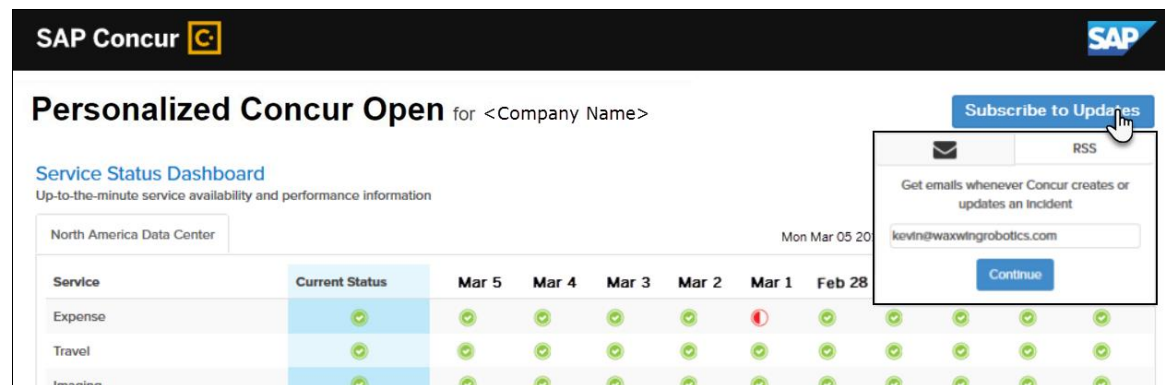


NOTE: Be aware that the detailed root cause analysis PDFs will be available starting around the date that the personalized view becomes available. The service history (start/stop dates and times, type of incident, etc.) will be displayed for the activity of the last two years. However, the root cause analysis PDFs will not be available for every incident and will only be available on a go-forward basis.

The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed. To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.



The user clicks **Continue**. This page appears.

SAP Concur  

Personalized Concur Open for <Company Name> [← Go to Your Service Status Dashboard](#)

[Subscribe to Email Updates](#)

Select Services

- ☒ Expense
- ☐ Travel
- ☐ Imaging
- ☐ Analysis/Intelligence
- ☐ Mobile

Select Data Centers

- ☒ US

Select Alert Types

- ☒ Initial Impact Assessment 
- ☐ Confirmed Impact 
- ☐ Update 
- ☐ Resolved 
- ☒ Root Cause Analysis 

[Subscribe](#)

The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.

SAP Concur  

Personalized Concur Open for <Company Name> [← Go to Your Service Status Dashboard](#)

Thank You!

Check your email for a link to verify your subscription.

Then you're all set to receive Concur Open updates.

Check your junk folder if you do not see the email in your inbox.

User Remains Signed In

All users – regardless of whether they signed in via user name/password or via SSO email token – automatically remain signed in for 30 days (via a cookie). In that 30-day period, whether the user enters directly (<https://open.concur.com>) or they click **Service Status** in the lower-left corner of the SAP Concur screen, they are directed to the generic Concur Open page. When they click **Log in to Personalized Concur Open**, users bypass the login page and go directly to the **Personalized Concur Open** page.

If, during the 30-day period, the user wants to log out, they click **Log Out** on the **Service Status Dashboard** page. (Clearing the cache also terminates the 30-day period.)

If, during the 30-day period, the customer acquires additional services from SAP Concur, the user should sign out and sign back in, in order to see the new service information.

SSO - More About Email Addresses in Profile

As described above, for SSO users who access Personalized Concur Open via the email token, SAP Concur authenticates the user by comparing the email address entered by the user to the email address in the user's SAP Concur profile.

Note the following:

- The email address that the user enters:
 - ♦ Must match the email address in the **Email 1** field in their SAP Concur profile; **Email 1** must be "verified."

Email Address	Verification Status	Verify	Contact?	Actions
Email 1	Verified	Disable Verification	Yes	
Email 2	Verified	Disable Verification	No	
Email 3	Not Verified	Verify	No	
Email 4	Verified	Disable Verification	No	

- ♦ Must be unique to that user; it cannot be shared with multiple people or logins in their company

NOTE: Users can have duplicate (non-unique) email addresses in their profile but **not** in the **Email 1** field. Email 1 must be unique.

The notification below could be sent to the user as a result of having the email associated to multiple concur profiles.

Dear Concur User,

An attempt to login or connect to a partner application was made using this email address. We could not authorize this request because of an error. This is most likely because this email address is found to be a duplicate in our system. Please contact your administrator to resolve this issue.

If you did not request to be connected to any partner application, please ignore this email.

Best practice for SSO users – before requesting the token email – is to ensure Email 1 in Profile is accurate and unique.

- If an employee no longer has access to SAP Concur (for example, leaves the company), that employee can no longer access the personalized view. Remember, in order to access the personalized view, they must have a Concur login or an email address in Profile. An inactive user or terminated employee has neither of those things.

Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

For those with subscriptions **before** the release of the new Personalized Concur Open, note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
 - ♦ Set the user's new subscription to match the company's services and data center in Personalized Concur Open
 - ♦ Notify the user (via email) of the change

NOTE: Best practice – after the personalized view is available – all users should access the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then SAP Concur will introduce the user (via email) to Personalized Concur Open.

Configuration/Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Financial Integration

SAP ICS for SAP ERP and S/4HANA Update

Overview

SAP has updated the financial integration between Concur Expense/Concur Invoice and SAP ERP: On Premise and S/4HANA: On Premise to support importing the following new types of cost objects to Concur:

- Maintenance Order
- Production Order
- Quality Management Order

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides more cost objects for clients in the logistics area.

Configuration / Feature Activation

This update is only available to clients using the financial integration between Concur Expense/Concur Invoice and SAP ERP: On Premise and S/4HANA: On Premise, and will be available with the SAP S/4 Hana and SAP ECC - Support Package – September 2018.

Next Generation (NextGen) Expense

****Ongoing** New User Interface for Concur Expense End Users**

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense.

- **We are currently in the Preview Period:** During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will continue to become available. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense: All customers will be required to move to NextGen Expense.** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Plain Text FTP

Support for Plain Text FTP Ended on September 1st, 2018

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur in November 2017. SAP Concur provided clients an extension until September 1st, 2018 to complete their transition to secure FTP protocols.

 **IMPORTANT:** Any client that has not transitioned to a secure FTP protocol will be unable to download their SAE and other Extract files, or upload Employee, List, Attendee, and other Import files.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations applied a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.



For more information, refer to the [Plain Text FTP Retirement FAQ](#).

Configuration / Feature Activation

This maintenance was **completed on September 1, 2018**.

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

SAP Concur's side: Secured protocols are automatically supported. There are no additional configuration or activation steps.

Clients must configure their FTP software/connection scripts to use secured protocols for connection, as listed below:

- SFTP (SSH-FTP) protocol requires port 22 (**SAP Concur preferred method**)
- FTPS (FTP-SSL) requires port 21 and TLS v.1.1, TLS v.1.2
- HTTPS requires port 443 and TLS v.1.1, TLS v.1.2



For more information, please refer to the [Client FAQ](#) and the [File Transfer User Guide](#).

Please work with your IT team to be able to accommodate this upcoming change and make sure that the file transfer process will keep working smoothly for you. For any technical questions, please open a support case and we will be glad to assist you.

SAP Concur's Platform

Callout Server Requirements Update

Overview

SAP Concur is upgrading the servers that support the SAP Concur Platform Callouts. This maintenance includes the Production Proxy Migration and PWS Server Migration to VM.

The North American Data Center update has been completed. The EMEA Data Center PWS Server Migration to VM is completed, and the Production Proxy Migration is estimated to be completed on October 31, 2018.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout

- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.

 **IMPORTANT:** If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE / CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur is automatically implementing these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Travel Allowance

(Norway) Updates for the June 22, 2018 Government Rate Changes

Overview

Concur has created a new system calculation property to turn on updates for the June 22, 2018 government rate changes. The name of the new system calculation property is **multiday_partial_trip_new_rules**.

NOTE: There is an issue with calculating the deductions for the last day of a multi-day trip if both Government and Company rates are used.

A fix for this issue is planned.

Enabling the new system calculation property results in the following changes to foreign and domestic trip rates:

FOREIGN TRIPS

Function	Before	After
International trips: Total trip duration between 6 and up to 12 hours	2/3 of the full allowance	1/2 of the full allowance
International trips: Total trip duration of exactly 12 hours	Full allowance	1/2 of the full allowance
intl_meals_factor	Value: 66.6667	Value: 50

DOMESTIC TRIPS

Function	Before	After
Domestic trips: Last day of multi-day trips	6 or more hours = 100%	Between 6 and 12 hours = 297 More than 12 hours = 552
domestic_high_meals_rate	Value: 460	Value: 552
domestic_low_hours	Value: 8	Value: 6
domestic_low_meals_rate	Value: 250	Value: 297

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps SAP Concur clients maintain legal compliance.

What the Client Admin Sees

The **Calculation Properties** tab of the **Travel Allowance** page displays the new **multiday_partial_trip_new_rules** option.

What the User Sees

If you enable this feature, employees will see a difference in meal rates for some domestic and foreign trips.

Configuration / Feature Activation

Concur automatically added this setting to the **Calculation Properties** tab. To enable the option, perform the following steps.

NOTE: This new setting is off (**N**) by default.

► **To enable this option:**

1. Click **Administration > Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Travel Allowance** (left menu).
3. Click the **Calculation Properties** tab.
4. In the **Calculation Method** list, select **Norway** Rules.
5. Click **multiday_partial_trip_new_rules**, and then click **Modify** to enable it.



For more information, refer to the *Travel Allowance Configuration Guide – Norway*.

Uploading Receipt Images

Support for Uploading HTML Ends September 15th, 2018

Overview

Users no longer have the option to upload scanned images of receipts that are formatted as HTML files.

Users will continue to be able to upload receipt images that use the following file formats: PNG, JPG, JPEG, PDF, TIF, and TIFF.

BUSINESS PURPOSE/CLIENT BENEFIT

This change closes a security gap and allows SAP Concur to devote more resources to features that are used by many or most of our clients.

Configuration/Feature Activation

This change is automatically available; there are no configuration or activation steps.



For general information about uploading receipt images, refer to the *Concur's Imaging Service – Overview* Expense End User Help topic.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Expense Assistant Can Create Trip-Based Expense Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group, and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

⚠ IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact Concur Client Support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

- Client Admin Release Summary - **What's New**
- Client Release Notes - All Products
- Client Fact Sheets
- Concur Training Toolkit
- Icons in the UI - **NEW**

Expense Setup Guides

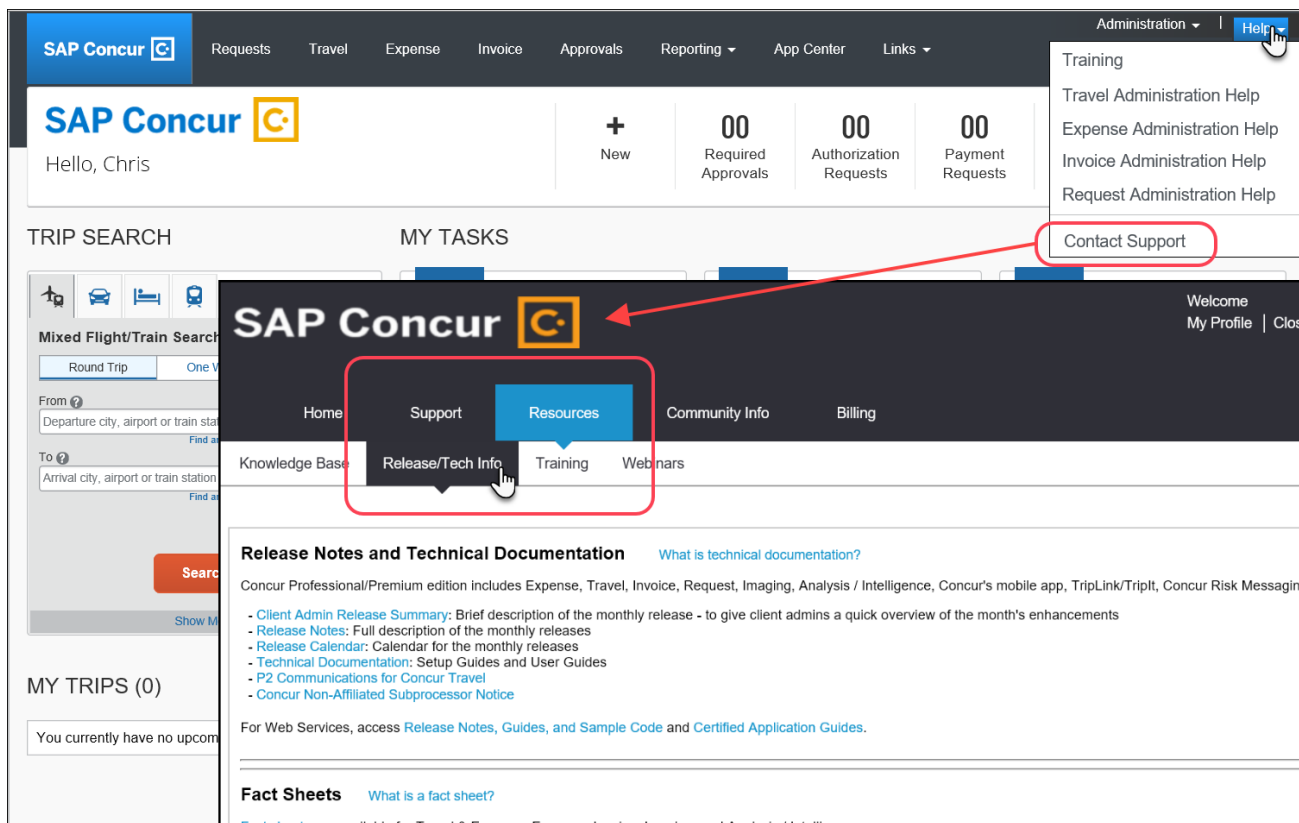
Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the Concur Support Portal.

Additional Release Notes and Other Technical Documentation: Concur Support Portal – Selected Users

If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the Support page, the user clicks **Resources > Release/Tech Info**.



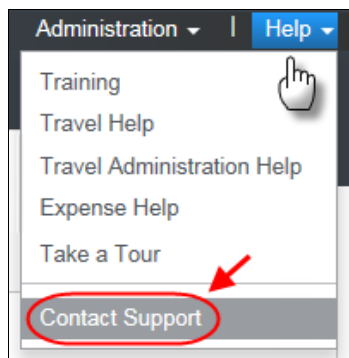
Cases

Steps for Getting a Status

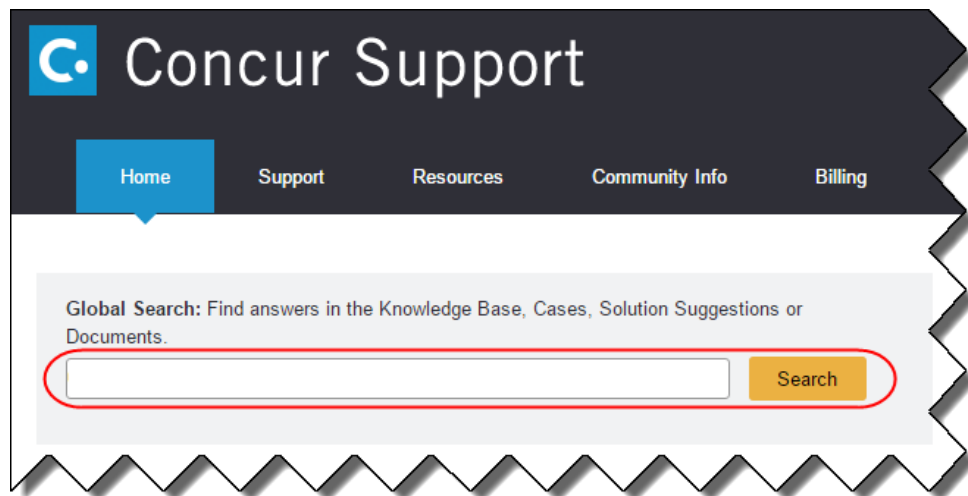
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
2. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

3. Enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: Oct 20, 2018 Initial Post: Friday, Oct 19, 8:00 AM PT	Client FINAL

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Release Notes

Admin

Updated Email Format

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, consistent look-and-feel across all SAP Concur services. The change will be introduced gradually. Some users will see the updated format immediately; some will see it over the next few months.

Be aware that the email content has not changed – just the look and feel.

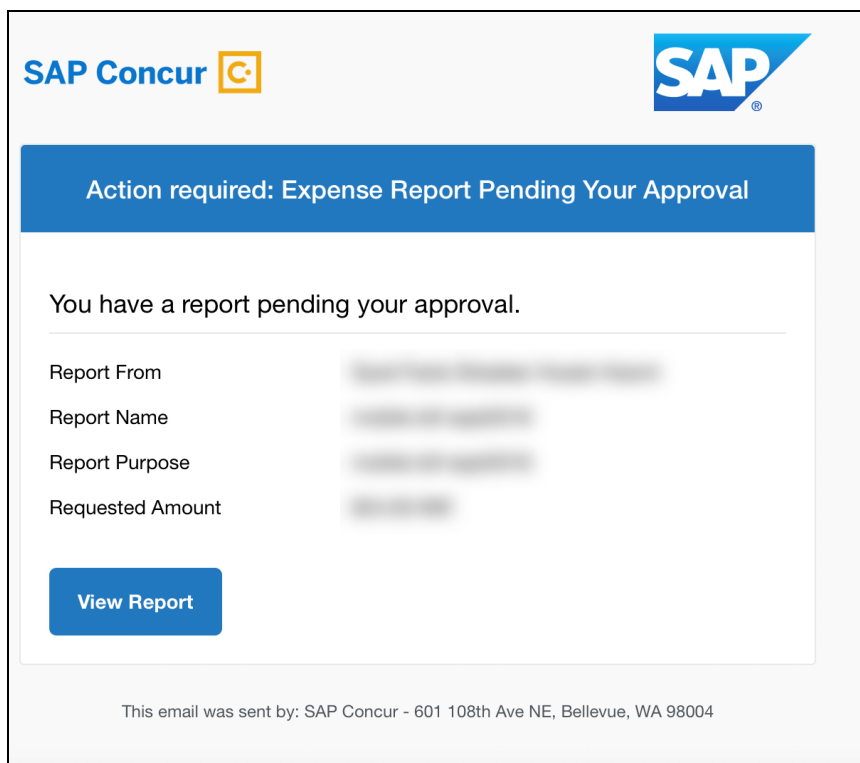
BUSINESS PURPOSE/CLIENT BENEFIT

The intent is to provide a consistent, updated look for users.

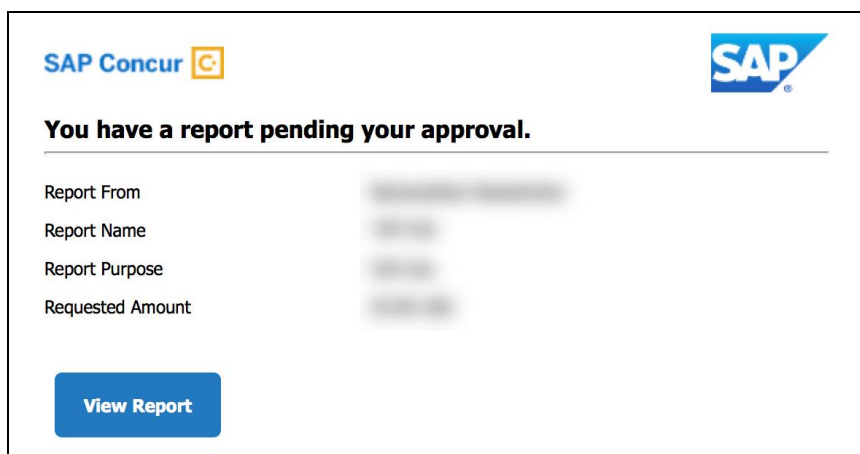
What the User Sees

The report approval email is shown below. Over time, all email generated from SAP Concur will have a similar look.

New email format:



Current email format:



Configuration/Feature Activation

This change will occur, over time, automatically; there are no additional configuration or activation steps.

Data Retention

Change to Email Notification of Configuration Changes

Overview

With this release, the system will automatically email all users who have the *Data Retention Administrator* role or permission whenever changes are made to the data retention policy.

Prior to this change, only the admin who made the change received the 72-hour confirmation email.

BUSINESS PURPOSE / CLIENT BENEFIT

This change provides greater visibility of configuration changes.

Configuration / Feature Activation

The change is automatically available; there are no additional configuration or activation steps.



For this change, SAP Concur has updated the *Shared: Data Retention Setup Guide*.

Email Infrastructure Change

Whitelist IP Addresses

Overview

SAP Concur is transitioning to a new email infrastructure for outbound emails from our products to SAP Concur users. Because of this, companies who filter inbound email based on the sending IP address must whitelist new IP addresses to ensure that their users receive email from SAP Concur.

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. Please work with your email server management team to ensure any required whitelists for IP addresses are updated so that your users continue to receive SAP Concur emails without interruptions.

Configuration / Feature Activation

Companies who filter inbound emails based on the sending IP address should obtain the IP address from SAP Concur support and modify their whitelists.

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE/CLIENT BENEFIT

Lists in Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration/Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Languages

Support for New Language

Overview

With this release, SAP Concur now supports the following language:

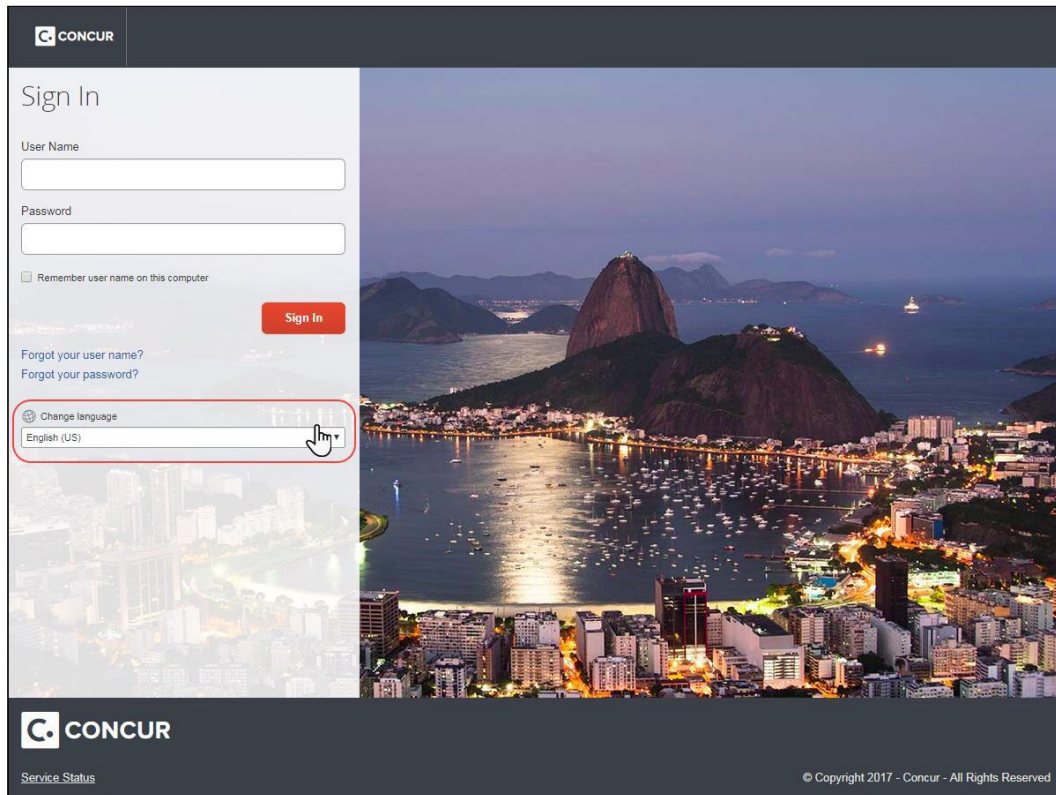
- Indonesian (Indonesia)

BUSINESS PURPOSE / CLIENT BENEFIT

This change allows more Concur Expense users to experience Concur Expense in their native text.

What the User Sees

The Concur Expense **Sign In** page displays new languages on the list.



Configuration / Feature Activation

To enable this new language, contact SAP Concur support.

Next Generation (NextGen) Expense

****Ongoing** New User Interface for Concur Expense End Users**

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense.

- **We are currently in the Preview Period:** During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will continue to become available. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense: All customers will be required to move to NextGen Expense.** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Receipts API

New MapUrl Field Added to Receipts v4 API

Overview

A new field, **MapUrl**, has been added to the Ground Transportation Receipt schema of the Receipts v4 API. This field contains a link to an image on Google Maps of the trip, if provided by the ground transportation supplier.

WHAT THE USER SEES

If the ground transportation provider sends the MapUrl to SAP Concur, the user will see a map image of the trip in the e-receipt window in Concur Expense.

	\$65.00 Visa -  11/10/2099 3:39 PM Receipt: 
Uber Technologies, Inc. 1455 Market St San Francisco US 94103	
Pick-up 3:08 PM 601 108th Ave NE Bellevue, US 98004	Drop-off 3:39 PM  3rd Ave Seattle, US 98104
Car BLACK	Duration 00:21:22
Distance 15.6 mi	Route 
Total: \$65.00	

BUSINESS PURPOSE / CLIENT BENEFIT

The new **MapUrl** field provides additional information about the ground transportation trip.

Configuration / Feature Activation

The image will appear automatically in the e-receipt window if the ground transportation supplier sends it to SAP Concur. There are no additional configuration or activation steps.

For more information on Receipts v4 API, refer to <https://developer.concur.com>.

SAP Concur's Platform

Callout Server Requirements Update Completed

Overview

SAP Concur has upgraded the servers that support the SAP Concur Platform Callouts. This maintenance includes the Production Proxy Migration and PWS Server Migration to VM.

These servers support the following functionality:

- Fetch Attendee Data Callout
- Fetch List Item Callout
- Event Notification Callout
- Launch External URL Callout
- Concur Salesforce Connector

NOTE: We do not anticipate any interruption in functionality for clients who use the SAP Concur Callouts (Fetch List, Fetch Attendee, Launch External URL, and Event Notification) and the Salesforce Connector.

Be aware that this maintenance means that for any customer callout URLs, SAP Concur has the following requirements:

- The endpoint is secured with SSL/TLS.
- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
- Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.

- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.

! IMPORTANT: If the callout URL does not comply with these requirements, the calls from SAP Concur may fail, beginning on May 9, 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

This maintenance will mitigate the out-of-warranty issue with our current hardware.

Configuration/Feature Activation

SAP Concur has implemented these changes. Clients using the SAP Concur Platform Callouts should discuss this change with their own IT group responsible for their callout to ensure that their custom solution is prepared for these changes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Archive Deactivated User Data**

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet customer expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for **at least three years**. The archive process moves this "deactivated" user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

USER/CUSTOMER BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for inactive user's personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that customers are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

A. SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

A. SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – they have been "marked inactive" in the SAP Concur system. A user must be deactivated for **over 3 years** without having been re-activated in order to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

A. For Professional Edition, the most significant difference would occur in **Company Admin > User Administration**.

However, once user information is archived:

- ♦ From within User Administration, if the **Use Travel Advanced Filters** option is chosen, the user will not be visible.
- ♦ From within User Administration, if the **Use Expense Advanced Filters** option is chosen, you will be able to see the user in search results as deactivated.
 - If you click the user's name, you will receive an error message: *The selected user exists in the Expense or Invoice application but the user contains conflicting or missing data. Contact Concur Client support to request help in resolving this error.*
 - If you click the icon in the **Profile** column, you will receive the generic error message.
 - If you click the user's login ID, you will see no historical login information for that user.

- ♦ If another user has the Self-Assigning Assistant permission or the user is a Proxy who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive an "switching user" error message.
- ♦ From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- ♦ These users will not have access to any of their past travel history.
- ♦ For Expense, the user would have access to their expense history if:
 - That history has not been removed by a Data Retention policy.
 - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

The change will occur automatically; there are no additional configuration or activation steps.

Approval Emails

****Planned Changes** Retirement of Approve or Reject via Email (December 11, 2018)**

Overview

For companies that use this feature, its retirement means that the content of the emails that are currently received by their users who approve expense reports will change.

NOTE: Companies who use this feature receive approval emails from ExpenseApproval@concursolutions.com. After this feature is retired, all approval emails will come from AutoNotification@concursolutions.com.

BEFORE DECEMBER 11, 2018

When enabled, this feature allows an approver to approve (or reject) an expense report by replying to the email.

AFTER DECEMBER 11, 2018

After this feature is retired, the approver can approve the report using either SAP Concur's mobile app or www.concursolutions.com.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will close a security gap and allow SAP Concur to devote more resources to features that are used by many or most of our clients.

What the Approver Sees

The approver will no longer see instructions to reply to the email.

**CONCUR**

You have a report pending your approval.

Report From	Chris Miller
Report Name	PacCo
Report Purpose	Annual Conference
Requested Amount	100.00 USD

To **approve** this expense report via email reply:

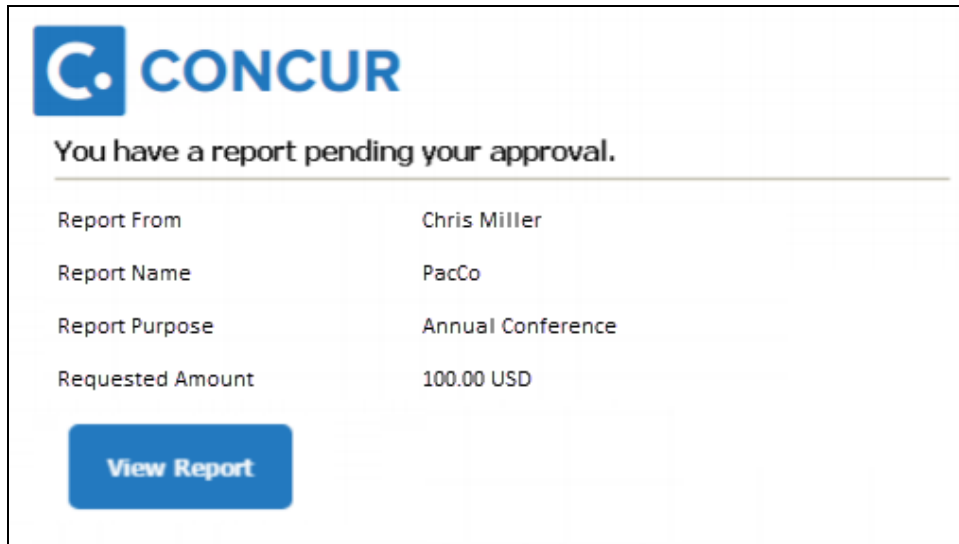
1. Reply to this email to send it back to Concur Travel & Expense at: ExpenseApproval@[REDACTED].com
2. Type the following as the first line of the reply email message: **Approve**
3. **Do not add or change any other information in the original email or in the reply.**

To **send this expense report back to the employee** via email reply:

1. Reply to this email to send it back to Concur Travel & Expense at: ExpenseApproval@[REDACTED].com
2. Type the following as the first line of the reply email message: **Reject**
3. **Do not add or change any other information in the original email or in the reply.**

Link To Approve Report
<http://www.concursolutions.com>

The approver will continue to see information about the report and a link to view the report using www.concursolutions.com.



The screenshot displays the SAP Concur logo at the top left. Below it, a message states: "You have a report pending your approval." This message is followed by a table with the following details:

Report From	Chris Miller
Report Name	PacCo
Report Purpose	Annual Conference
Requested Amount	100.00 USD

At the bottom of the table, there is a blue button labeled "View Report".

Configuration / Feature Activation

The feature will be automatically disabled; there are no deactivation steps.



For general information about this functionality, refer to the *Expense: Email Approval Setup Guide* before this document's scheduled archive in January 2019.

Company Administration

****Planned Changes** Single Sign-On (SSO) Self-Service Option Coming to SAP Concur**

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur products which provides SAP Concur clients with a self-service option for setting up SSO for their organization. SSO is currently supported for Concur Expense, Invoice, Request, and Travel.

Other SAP Concur products and services are outside the scope of this initial release.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Administration > Company > Company Admin** page.

NOTE: This new feature does not affect Travel clients who are already using the Security Keys feature.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides SAP Concur clients with a self-service option for setting up SSO.

Configuration / Feature Activation

Configuration information will be coming in a future release note.

Currency Admin

****Planned Changes** Old Currency Retired: Bolívar Fuerte VEF (Venezuela)**

Overview

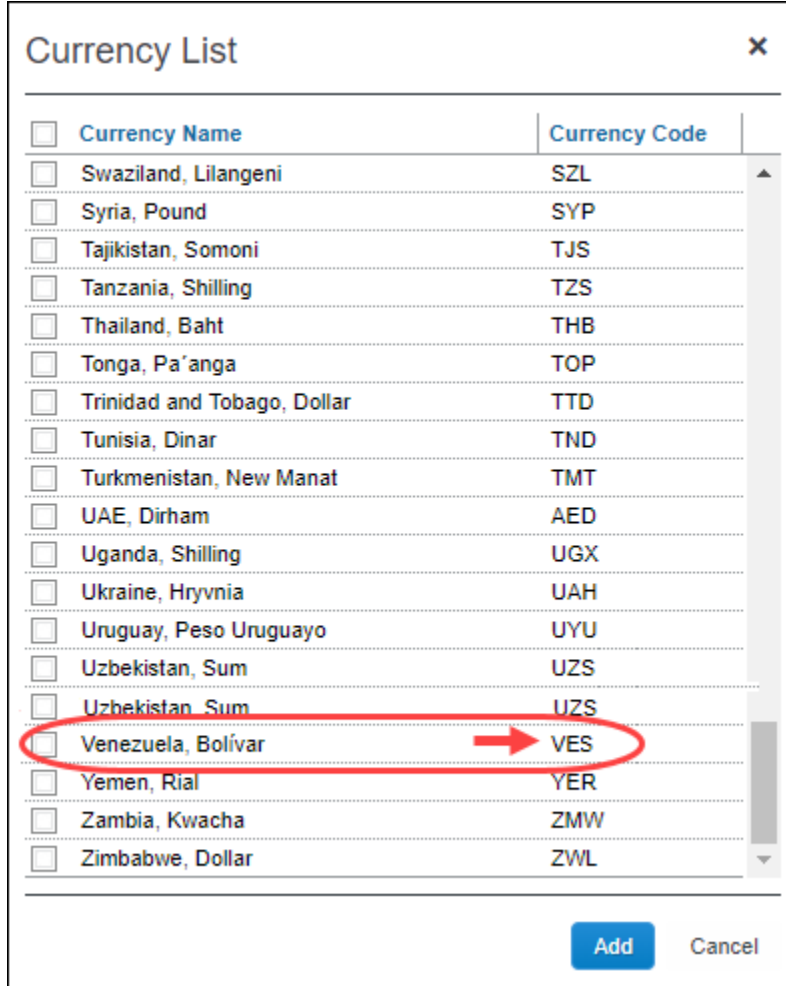
Following the Central Bank of Venezuela's redenomination of its currency to Bolívar Soberano (VES), the Bolívar Fuerte (VEF) has been withdrawn as legal tender. Accordingly, SAP Concur has retired the Bolívar Fuerte (VEF) currency from Concur Expense.

BUSINESS PURPOSE/CLIENT BENEFIT

This change supports SAP Concur customers who use the Bolívar currency.

What the Admin/Implementation Sees

On the **Currency List**, admins now see only **Venezuela Bolívar VES**. To access the **Currency List** page, click **Administration > Expense > Currency Admin > Reimbursement Currencies** (tab) > **Add Currency** (button).



The screenshot shows a 'Currency List' window with a table of currencies. The table has two columns: 'Currency Name' and 'Currency Code'. The entry for 'Venezuela, Bolívar' is highlighted with a red circle, and an arrow points from the name to the code 'VES'.

☐ Currency Name	Currency Code
☐ Swaziland, Lilangeni	SZL
☐ Syria, Pound	SYP
☐ Tajikistan, Somoni	TJS
☐ Tanzania, Shilling	TZS
☐ Thailand, Baht	THB
☐ Tonga, Pa'anga	TOP
☐ Trinidad and Tobago, Dollar	TTD
☐ Tunisia, Dinar	TND
☐ Turkmenistan, New Manat	TMT
☐ UAE, Dirham	AED
☐ Uganda, Shilling	UGX
☐ Ukraine, Hryvnia	UAH
☐ Uruguay, Peso Uruguayo	UYU
☐ Uzbekistan, Sum	UZS
☐ Venezuela, Bolívar	VES
☐ Yemen, Rial	YER
☐ Zambia, Kwacha	ZMW
☐ Zimbabwe, Dollar	ZWL

At the bottom right of the window are 'Add' and 'Cancel' buttons.

Configuration/Feature Activation

The old currency is automatically removed from selection on an expense and for activation as a reimbursement currency; there are no additional configuration or activation steps. Any outstanding card transactions that may come in using the old currency will not encounter any issues.

! IMPORTANT: If your company has any active users still configured with a reimbursement currency of Bolívar Fuerte (VEF), they should be moved to the new currency immediately. As the changeover was mandated by the Venezuelan government for company premises located in Venezuela, this is not likely to be the case.



For general information about this functionality, refer to the *Expense: Currency Admin Setup Guide*.

Expense Assistant

****Planned Changes** Expense Assistant Can Create Trip-Based Expense Reports**

Overview

Admins can now pre-configure Expense Assistant options.

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a client's expenses flow into Concur Expense. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant will be defined at the group level.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

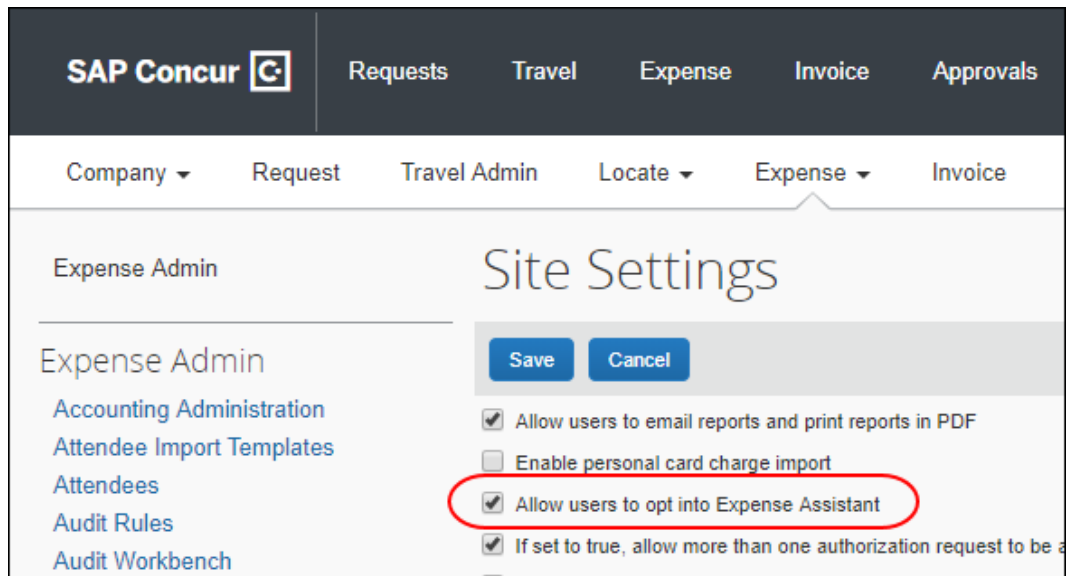
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature will be automatically on for the company, making the feature available to your users.

! IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact SAP Concur support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box will be selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Configuration for Group** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users in a group by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list for your groups.

Until the trip-based expense report functionality for Expense Assistant is completed, when Expense Assistant is enabled, Expense Assistant will continue creating calendar-based expense reports for the group if you select the *Monthly or By Trip* or *Monthly only* options in the **For Expense Assistant, allow users to opt out or to use** field.

If you currently have Expense Assistant enabled for your company and you select the *By Trip only* or *None* options, Expense Assistant will be disabled for the group and users in the group will not see any Expense Assistant functionality.



For more information about Expense Assistant, refer to the *FAQ - Expense Assistant for Expense Professional* available from **Help > Expense Administration Help > Resources for Administrators - Professional Edition > Client Fact Sheets (English Only)**.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

Using Online Help

Access Online Help

To access online Help, hover the mouse pointer over the **Help** menu (upper-right corner of the page) and

Quick Links - Concur Professional/Premium

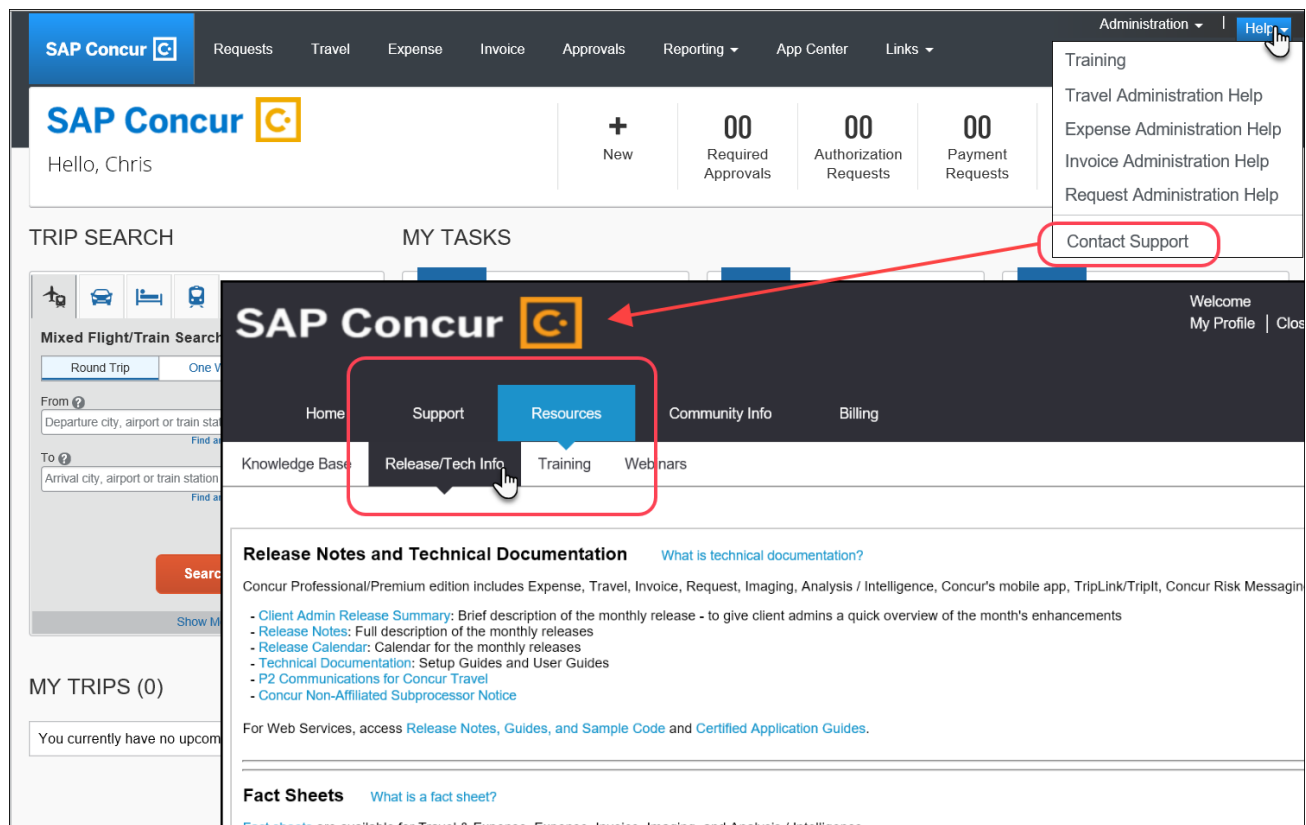
Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

SAP Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the SAP Concur support portal.

Additional Release Notes and Other Technical Documentation: SAP Concur Support Portal – Selected Users

If a user has the proper SAP Concur support portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the support page, the user clicks **Resources > Release/Tech Info**.



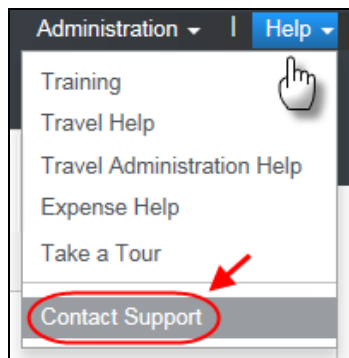
Cases

Steps for Getting a Status

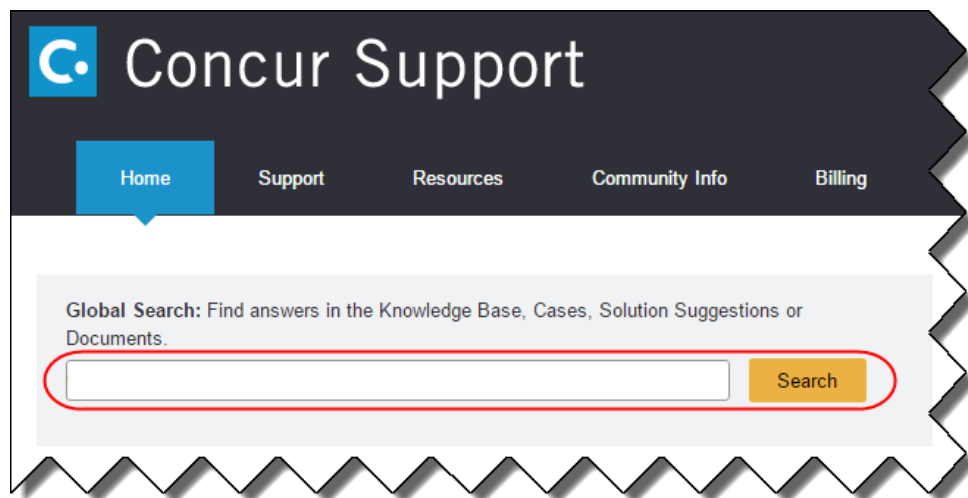
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: Nov 17, 2018 Initial Post: Friday, Nov 16, 2:00 PM PT	Client FINAL

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Release Notes

Admin

****Ongoing** Updated Email Format**

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, consistent look-and-feel across all SAP Concur services.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent is to provide a consistent, updated look for users.

IMPORTANT

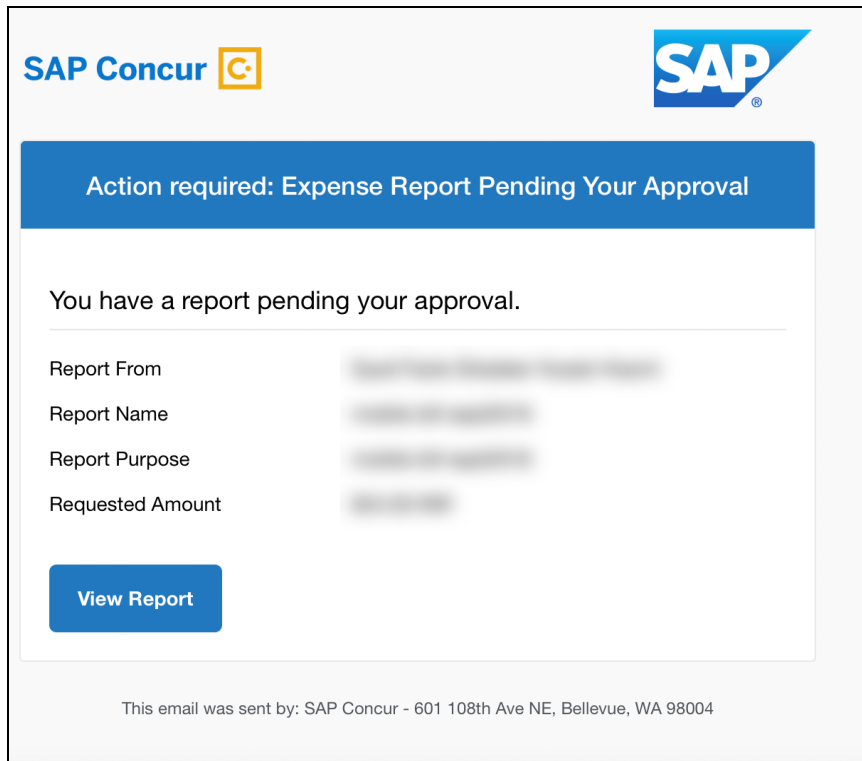
Note the following:

- Be aware that the email content has not changed – just the look and feel.
- The changes will appear over time. Each product team (Expense, Invoice, Travel, etc.) decides when to use the new format. Timing will be based on resource availability and the priority of other scheduled enhancements.
- Do not expect that all product emails will change at the same time. For example, perhaps Expense approval email will be first, and then other Expense notifications will follow.
- There is no assigned end date to the project. Expect that the changes may take longer than a year.
- Each team will provide release notes when their new emails are scheduled to appear.

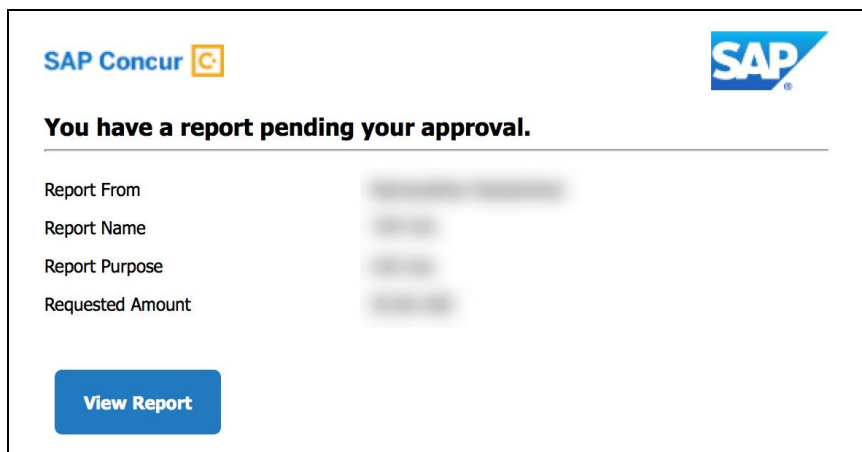
What the User Sees

The Expense approval email is shown below. Over time, all email generated from SAP Concur will have a similar look.

New email format:



Current email format:



Configuration / Feature Activation

This change will occur, over time, automatically; there are no additional configuration or activation steps.

Approval Emails

Retirement of Approve or Reject via Email (December 11, 2018)

Overview

For companies that use this feature, its retirement means that the content of the emails that are currently received by their users who approve expense reports will change.

NOTE: Companies who use this feature receive approval emails from ExpenseApproval@concursolutions.com. After this feature is retired, all approval emails will come from AutoNotification@concursolutions.com.

BEFORE DECEMBER 11, 2018

When enabled, this feature allows an approver to approve (or reject) an expense report by replying to the email.

AFTER DECEMBER 11, 2018

After this feature is retired, the approver can approve the report using either the SAP Concur mobile app or www.concursolutions.com.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will close a security gap and allow SAP Concur to devote more resources to features that are used by many or most of our clients.

What the Approver Sees

The approver will no longer see instructions to reply to the email.

 **CONCUR**

You have a report pending your approval.

Report From	Chris Miller
Report Name	PacCo
Report Purpose	Annual Conference
Requested Amount	100.00 USD

To **approve** this expense report via email reply:

1. Reply to this email to send it back to Concur Travel & Expense at: ExpenseApproval@██████████.com
2. Type the following as the first line of the reply email message: **Approve**
3. **Do not add or change any other information in the original email or in the reply.**

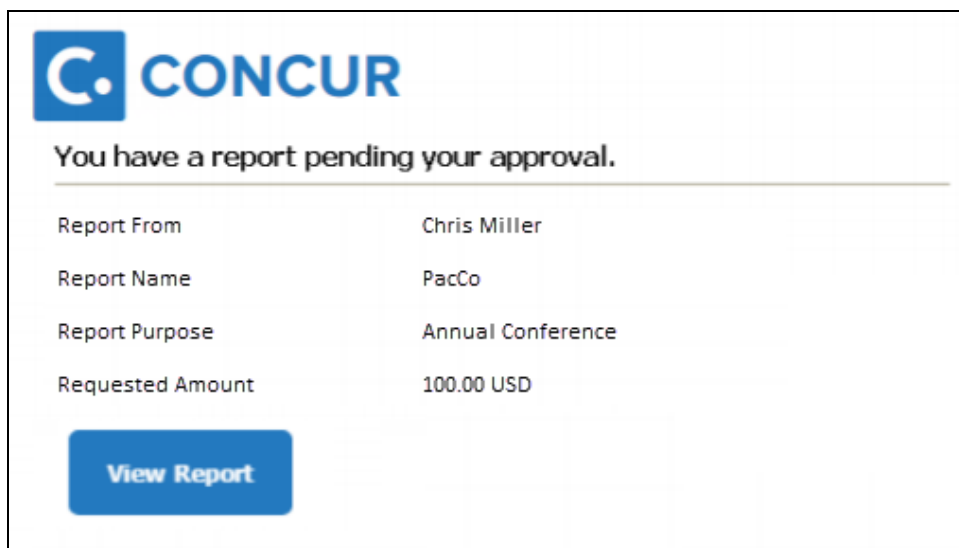
To **send this expense report back to the employee** via email reply:

1. Reply to this email to send it back to Concur Travel & Expense at: ExpenseApproval@██████████.com
2. Type the following as the first line of the reply email message: **Reject**
3. **Do not add or change any other information in the original email or in the reply.**

Link To Approve Report

<http://www.concursolutions.com>

The approver will continue to see information about the report and a link to view the report using www.concursolutions.com.



You have a report pending your approval.	
Report From	Chris Miller
Report Name	PacCo
Report Purpose	Annual Conference
Requested Amount	100.00 USD
View Report	

Configuration / Feature Activation

The feature will be automatically disabled; there are no deactivation steps.



For general information about this functionality, refer to the *Expense: Email Approval Setup Guide* before this document's scheduled archive in January 2019.

Currency Admin

(Venezuela) Old Currency Retired: Bolívar Fuerte VEF

Overview

Following the Central Bank of Venezuela's redenomination of its currency to Bolívar Soberano (VES), the Bolívar Fuerte (VEF) has been withdrawn as legal tender. Accordingly, SAP Concur has retired the Bolívar Fuerte (VEF) currency from Concur Expense.

BUSINESS PURPOSE / CLIENT BENEFIT

This change supports SAP Concur customers who use the Bolívar currency.

What the Admin/Implementation Sees

On the **Currency List**, admins now see only **Venezuela Bolívar VES**. To access the **Currency List** page, click **Administration > Expense > Currency Admin > Reimbursement Currencies** (tab) > **Add Currency** (button).

☐ Currency Name	Currency Code
☐ Swaziland, Lilangeni	SZL
☐ Syria, Pound	SYP
☐ Tajikistan, Somoni	TJS
☐ Tanzania, Shilling	TZS
☐ Thailand, Baht	THB
☐ Tonga, Pa'anga	TOP
☐ Trinidad and Tobago, Dollar	TTD
☐ Tunisia, Dinar	TND
☐ Turkmenistan, New Manat	TMT
☐ UAE, Dirham	AED
☐ Uganda, Shilling	UGX
☐ Ukraine, Hryvnia	UAH
☐ Uruguay, Peso Uruguayo	UYU
☐ Uzbekistan, Sum	UZS
☐ Uzbekistan, Sum	UZS
☐ Venezuela, Bolívar	VES
☐ Yemen, Rial	YER
☐ Zambia, Kwacha	ZMW
☐ Zimbabwe, Dollar	ZWL

Add Cancel

Configuration / Feature Activation

The old currency is automatically removed from selection on an expense and for activation as a reimbursement currency; there are no additional configuration or activation steps. Any outstanding card transactions that may come in using the old currency will not encounter any issues.

⚠ IMPORTANT: If your company has any active users still configured with a reimbursement currency of Bolívar Fuerte (VEF), they should be moved to the new currency immediately. As the changeover was mandated by the Venezuelan government for company premises located in Venezuela, this is not likely to be the case.



For general information about this functionality, refer to the *Expense: Currency Admin Setup Guide*.

Email Infrastructure Change ****Ongoing****

Add IP Addresses to Safe Sender List

Overview

SAP Concur is transitioning to a new email infrastructure for outbound email from our products to SAP Concur users. Because of this, companies who filter inbound email based on the sending IP address must add the new IP addresses to their Safe Sender list to ensure that their users receive email from SAP Concur.

Concur Expense Only

Be aware that – at this time – the issue described here affects only companies that use Concur Expense **and** filter incoming email based on IP addresses. (This includes all editions of Expense – whether the company uses Concur Expense by itself or integrated with any other SAP Concur product or service.) Other SAP Concur services (such as Travel and Concur Pay) are not currently affected.

We are currently targeting the first quarter of 2019 to make additional changes. Be aware that all affected companies will be notified well ahead of time and will be provided all possible options for managing this issue.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If you use Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure any required Safe Sender lists for IP addresses are updated so that your users continue to receive SAP Concur email without interruptions.

Expense Assistant

Expense Assistant Can Create Trip-Based Expense Reports

Overview

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a user's expenses flow into Concur Expense. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant is defined at the group level.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

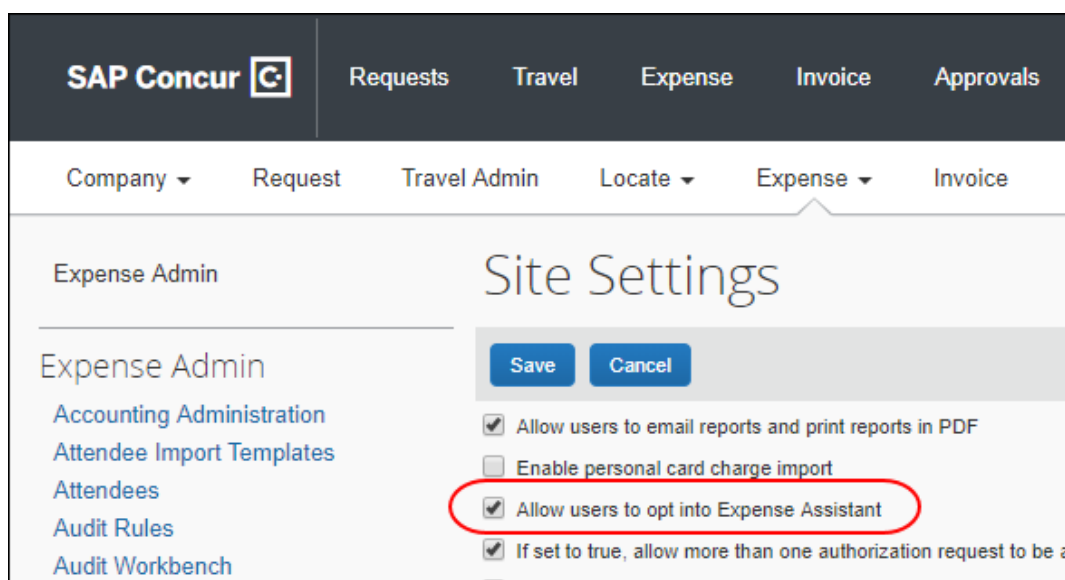
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not display on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

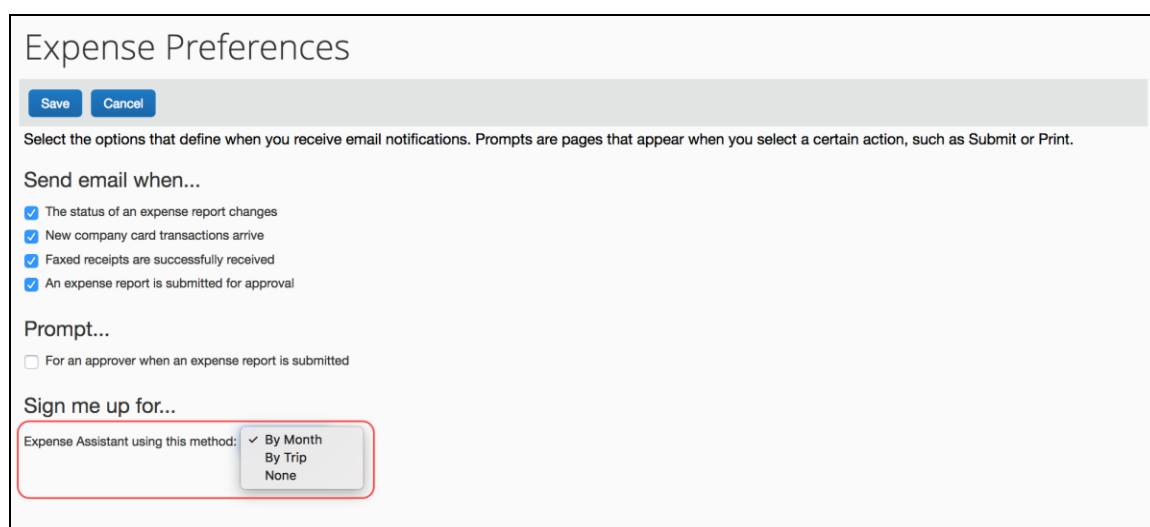
- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

What the User Sees - Existing UI

If the user is using the existing UI (has not yet moved to NextGen Expense), once Expense Assistant is enabled for your company, and the user group setting is *Monthly or By Trip or Trip Only*, users will need to enable trip-based Expense Assistant for themselves.

There is one way a user can enable Expense Assistant: from Profile.

On the **Expense Preferences** page (**Profile > Profile Settings**), users select from the Expense Assistant using this method: [list of available options] list, and then click **Save**.



The screenshot shows the 'Expense Preferences' page. At the top, there are 'Save' and 'Cancel' buttons. Below them is a heading 'Expense Preferences' and a sub-heading 'Send email when...'. Under this heading, there are four checked checkboxes: 'The status of an expense report changes', 'New company card transactions arrive', 'Faxed receipts are successfully received', and 'An expense report is submitted for approval'. Below this is a section 'Prompt...' with an unchecked checkbox 'For an approver when an expense report is submitted'. At the bottom, there is a section 'Sign me up for...' with a label 'Expense Assistant using this method:' and a dropdown menu. The dropdown menu is open, showing three options: 'By Month' (selected), 'By Trip', and 'None'. The dropdown menu is highlighted with a red border.

Once enabled by a user, for trip-based Expense Assistant, the following message appears and confirms that feature is on: "**All incoming expenses that occur between your trip start and end date will be placed on a trip-related report. Turn off Expense Assistant.**"

Manage Expenses

ACTIVE REPORTS


Create New Report

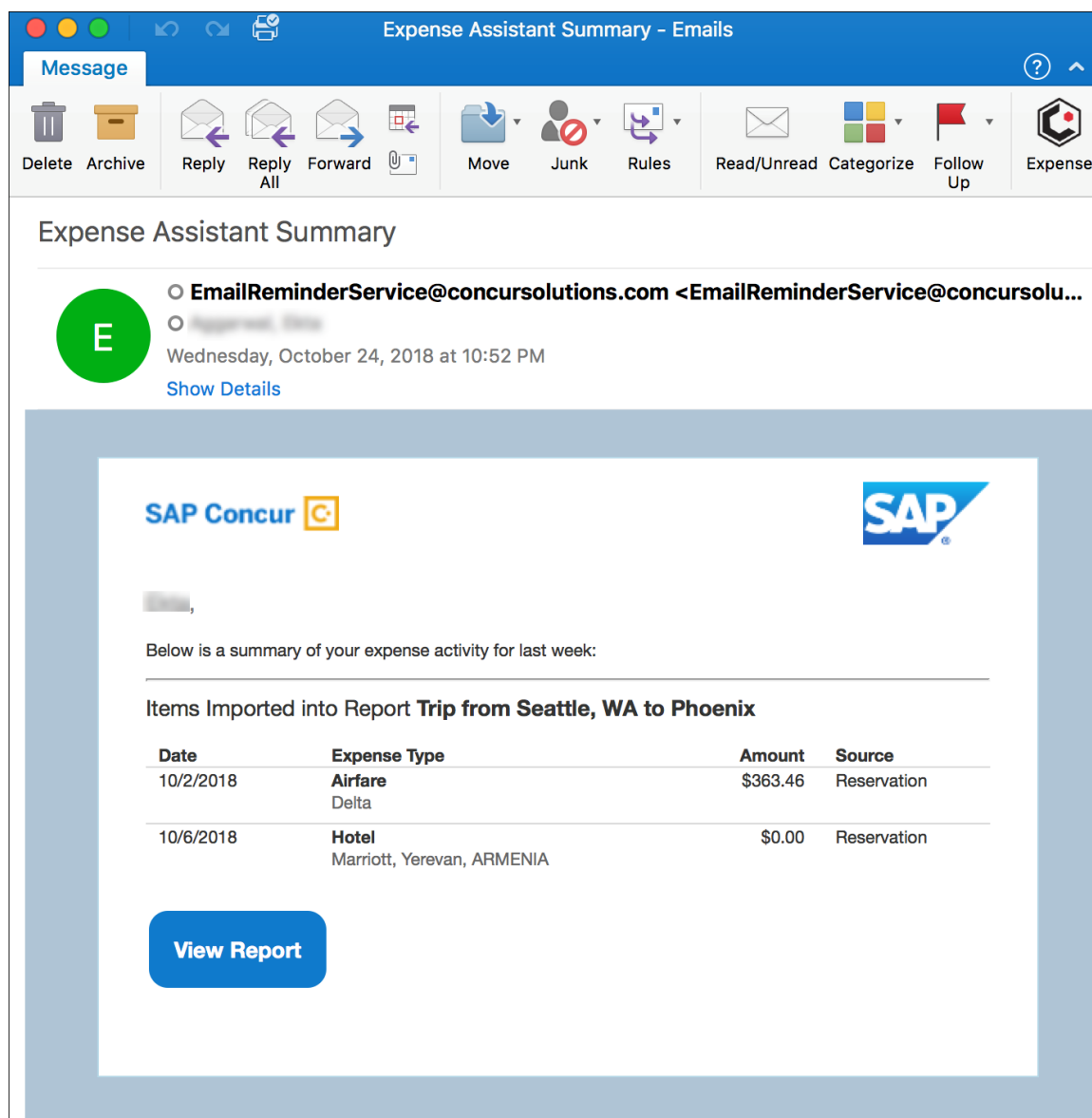
NOT SUBMITTED

Trip to San Francisco
05/08/2018

\$630.00

All incoming expenses that occur between your trip start and end date will be placed on a trip-related report. [Turn off Expense Assistant](#)

Since trip-based expense assistant may create expense reports at different times each month, Concur Expense sends the user a summary email when a trip-based expense report is created (if prior to trip start date). After that, Concur Expense sends a weekly email that summarizes the activity that occurred in the auto-created expense report after the trip began.



What the User Sees – NextGen Expense

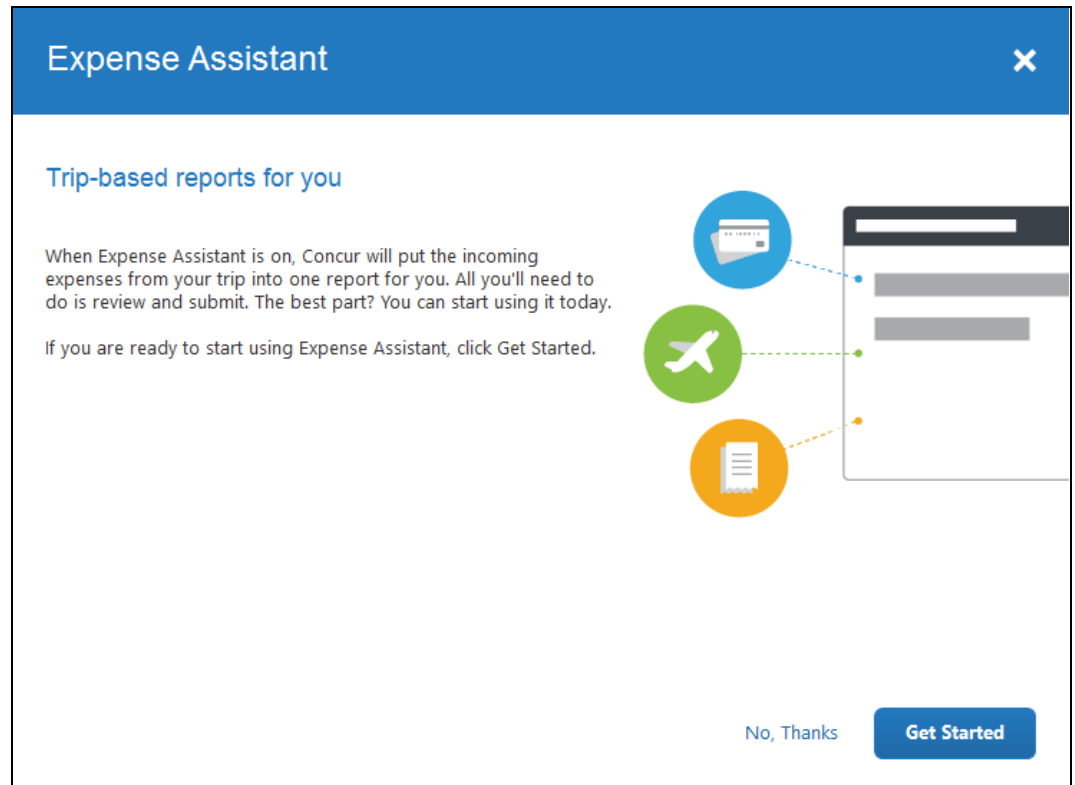
ENABLE EXPENSE ASSISTANT

If the user is using NextGen Expense and if the user has at least one unexpensed travel segment (itinerary) in **Available Expenses**, the **Expense Assistant** page appears.

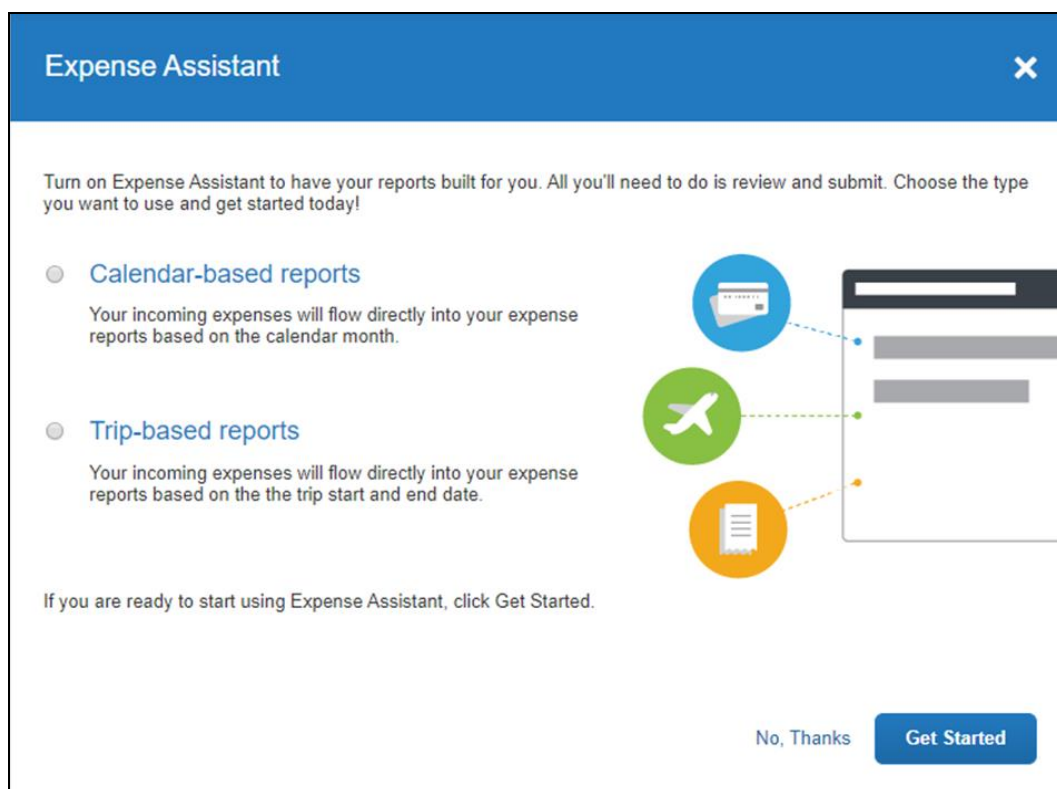
There are three ways a user can enable Expense Assistant: when they have Available Expenses, whether or not they have any Available Expenses, and from Profile.

- When your users log on to Concur Expense and go to the Expense home page, they will see the following screen. Since Concur Expense needs some available expenses and an unexpensed travel segment (itinerary) present to show how it works, this will show at the first time the user logs in and has available expenses to be used.

- ♦ If the admin selected *By Trip only* in the **For Expense Assistant, allow users to opt out or to use** list in Group Configuration (described above), then the **Expense Assistant** page that appears allows the user to select whether or not to use the feature.



- ♦ If the admin selected *Monthly or By Trip* in the **For Expense Assistant, allow users to opt out or to use** list in Group Configuration (described above), then the **Expense Assistant** page that appears allows the user to select trip-based, calendar-based, or neither.



Expense Assistant [X]

Turn on Expense Assistant to have your reports built for you. All you'll need to do is review and submit. Choose the type you want to use and get started today!

☐ **Calendar-based reports**
Your incoming expenses will flow directly into your expense reports based on the calendar month.

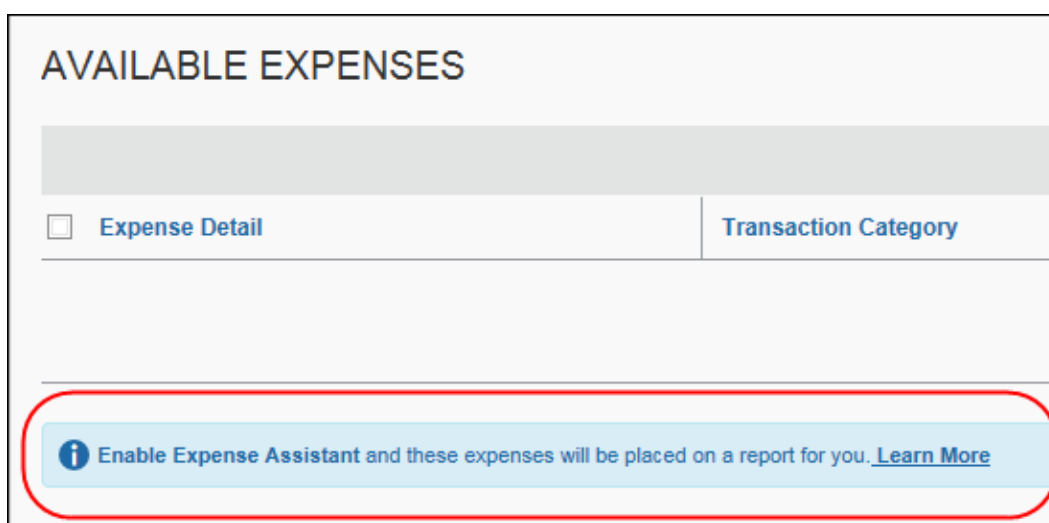
☐ **Trip-based reports**
Your incoming expenses will flow directly into your expense reports based on the the trip start and end date.

If you are ready to start using Expense Assistant, click Get Started.

No, Thanks **Get Started**

-Or-

- If users do not currently have any available expenses or an unexpensed travel segment (itinerary), they will see the following message in the **Available Expenses** section:



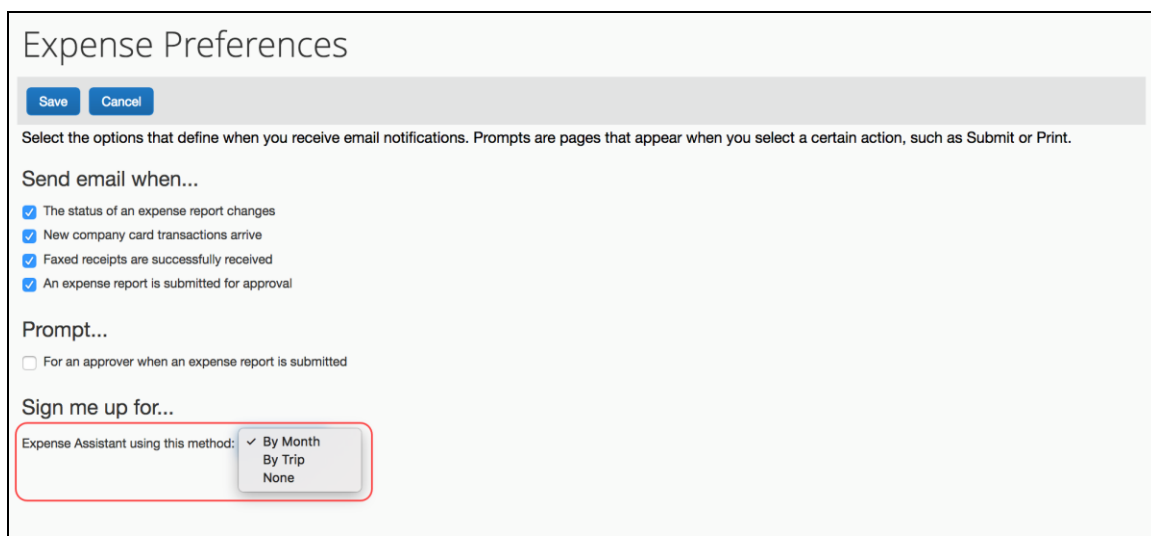
AVAILABLE EXPENSES

☐ Expense Detail	Transaction Category
i Enable Expense Assistant and these expenses will be placed on a report for you. Learn More	

The users need to click **Learn More**, and then click **Get Started** to begin using Expense Assistant.

-Or-

- If the user wants to enable Expense Assistant and the pages shown above do not appear automatically, the user can enable the feature in Profile. On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects *By Month* or *By Trip* from the **Expense Assistant using this method** list, and then clicks **Save**.



Expense Preferences

[Save](#) [Cancel](#)

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

- ☒ The status of an expense report changes
- ☒ New company card transactions arrive
- ☒ Faxed receipts are successfully received
- ☒ An expense report is submitted for approval

Prompt...

☐ For an approver when an expense report is submitted

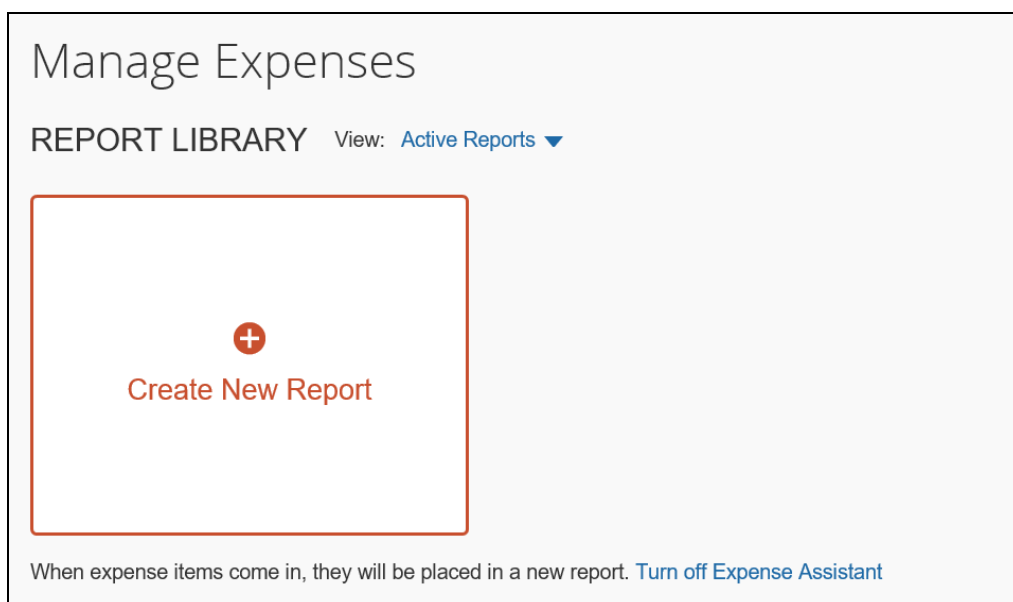
Sign me up for...

Expense Assistant using this method: ✓ By Month
By Trip
None

DISABLE EXPENSE ASSISTANT

The user can disable Expense Assistant two ways:

- On the **Manage Expenses** page, the user clicks **Turn Off Expense Assistant** below the report library.



Manage Expenses

REPORT LIBRARY View: [Active Reports](#) ▼

+

Create New Report

When expense items come in, they will be placed in a new report. [Turn off Expense Assistant](#)

- On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects *None* from the **Expense Assistant using this method** list, and then clicks **Save**.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration will remain unchanged.

For new clients, the feature is automatically selected (enabled) on the **Site Settings** page for the company, making the feature available to your users.

⚠ IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact SAP Concur support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box is selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* is

selected in the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.



For more information, refer to the *Expense: Expense Assistant Setup Guide*.

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE / CLIENT BENEFIT

Lists in Concur Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration / Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

****Ongoing** New User Interface for Concur Expense End Users**

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense.

- **We are currently in the Preview Period:** During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will continue to become available. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense: All customers will be required to move to NextGen Expense.** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Payment Manager

Accounting Extract Reconciliation Has Moved to Monitor Batches

Overview

For clients who have Expense Pay or Expense Pay - Global, the **Accounting Extract Reconciliation** tool is relocating from **Tools > Concur Classic Admin** to **Tools > Payment Manager > Monitor Batches**.

The previous (Concur Classic Admin) access path was **Administration > Company > Tools > Concur Classic Admin > Reimbursement Manager > Extract Reconciliation**.

The new (Payment Manager) access path is **Administration > Company > Tools > Payment Manager > Monitor Batches > Accounting Extract Reconciliation**.

The original Reimbursement Manager pages (**Administration > Company > Tools > Concur Classic Admin > Reimbursement Manager**) will be retired by the end of Q1 2019.

BUSINESS PURPOSE / CLIENT BENEFIT

This change puts the tool in a more convenient location for reimbursement managers and discontinues the need to use the original Reimbursement Manager pages.

What the Admin Sees

The **Accounting Extract Reconciliation** tool now appears as a tab.

BEFORE

CONCUR Welcome adminfn a. adminln

Concur Central > Reimbursement Manager

[Extract Reconciliation](#)

All Reimbursement Manager functions other than Extract Reconciliation have been moved to the c

Accounting Extract Reconciliation

Accounting Extract Reconciliation

Find: Name Equals

Currency: All

Includes Reports: All

Extract Job Name	Extract Run Number	Extract Run Date/Time	Currency
Rows found: 0			

AFTER

Monitor Batches

View Batches View Funding Bank Statements **Extract Reconciliation**

Advanced Search

Find Extracts Where: Extract Name Begins With

Currency: Extract Run Date (From): 10/08/2018 Extract Run Date (To): 10/23/2018 Payment Status: Any

Extract Name	Extract Run Number	Extract Run Date *	Currency	Extracted Amount	Processed Amount	Paid Amount	Sent for Payment Amount	Not sent for Payment Amount
APIGL Extract	1	10/23/2018 12:43 PM	USD	313.84 USD	313.84 USD	0.00 USD	0.00 USD	313.84 USD

Page 1 of 1 | | Displaying Records 1 - 1 of 1

Configuration / Feature Activation

The feature is automatically available for users with Reimbursement Manager or Reimbursement Auditor roles; there are no additional configuration or activation steps.



For more information, including what the details page looks like, refer to the *Expense: Payment Manager User Guide* or the *Expense: Payment Manager for Expense Pay Global User Guide*.

Travel Allowance

(Norway) Legal Changes to Expense Trips Calculations

Overview

SAP Concur has created two new system calculation properties to support extended domestic trips. The names of the new system calculation properties are:

- (Government rate) **extended_trip_domestic_govt_amount**
- (Company rate) **extended_trip_domestic_comp_amount**

These new calculation properties are used for domestic trips longer than 28 days. Beginning on the 29th day of travel, the new calculation properties are used. The default amount for each new property is 195 Norwegian Kroner (NOS).

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps SAP Concur clients maintain legal compliance.

What the Client Admin Sees

The **Calculation Properties** tab of the **Travel Allowance** page displays the new properties.

What the User Sees

Employees will see a difference in meal rates for some domestic trips.

Configuration / Feature Activation

Concur automatically added these settings to the **Calculation Properties** tab. To change the default the amount for your company rate, perform the following steps.

NOTE: The company setting is **195** NOS by default, and if you change the amount to pay more, then for tax purposes, you should track the additional amount paid.

► **To change the default rate:**

1. Click **Administration > Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Travel Allowance** (left menu).
3. Click the **Calculation Properties** tab.
4. In the **Calculation Method** list, select **Norway** Rules.
5. Click **extended_trip_domestic_comp_amount**, and then click **Modify** to edit it.



For more information, refer to the *Travel Allowance Configuration Guide – Norway*.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Archive Deactivated User Data**

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet customer expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for **at least three years**. The archive process moves this "deactivated" user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

USER/CUSTOMER BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for inactive user's personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that customers are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

A. SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

A. SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – they have been "marked inactive" in the SAP Concur system. A user must be deactivated for **over 3 years** without having been re-activated in order to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

A. For Professional Edition, the most significant difference would occur in **Company Admin > User Administration**.

However, once user information is archived:

- ◆ From within User Administration, if the **Use Travel Advanced Filters** option is chosen, the user will not be visible.
- ◆ From within User Administration, if the **Use Expense Advanced Filters** option is chosen, you will be able to see the user in search results as deactivated.
 - If you click the user's name, you will receive an error message: *The selected user exists in the Expense or Invoice application but the user contains conflicting or missing data. Contact Concur Client support to request help in resolving this error.*
 - If you click the icon in the **Profile** column, you will receive the generic error message.
 - If you click the user's login ID, you will see no historical login information for that user.

- ♦ If another user has the Self-Assigning Assistant permission or the user is a Proxy who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive an "switching user" error message.
- ♦ From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- ♦ These users will not have access to any of their past travel history.
- ♦ For Expense, the user would have access to their expense history if:
 - That history has not been removed by a Data Retention policy.
 - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

The change will occur automatically; there are no additional configuration or activation steps.

****Planned Changes** New SAP Concur Sign In Page**

Overview

SAP Concur is planning to add a new **Sign In** page, providing an updated login experience for users who log in with a user name and password credentials. Current Single Sign-On (SSO) users will log in without having to enter additional credentials. This feature is planned for 2019.

The new **Sign In** page feature includes the following:

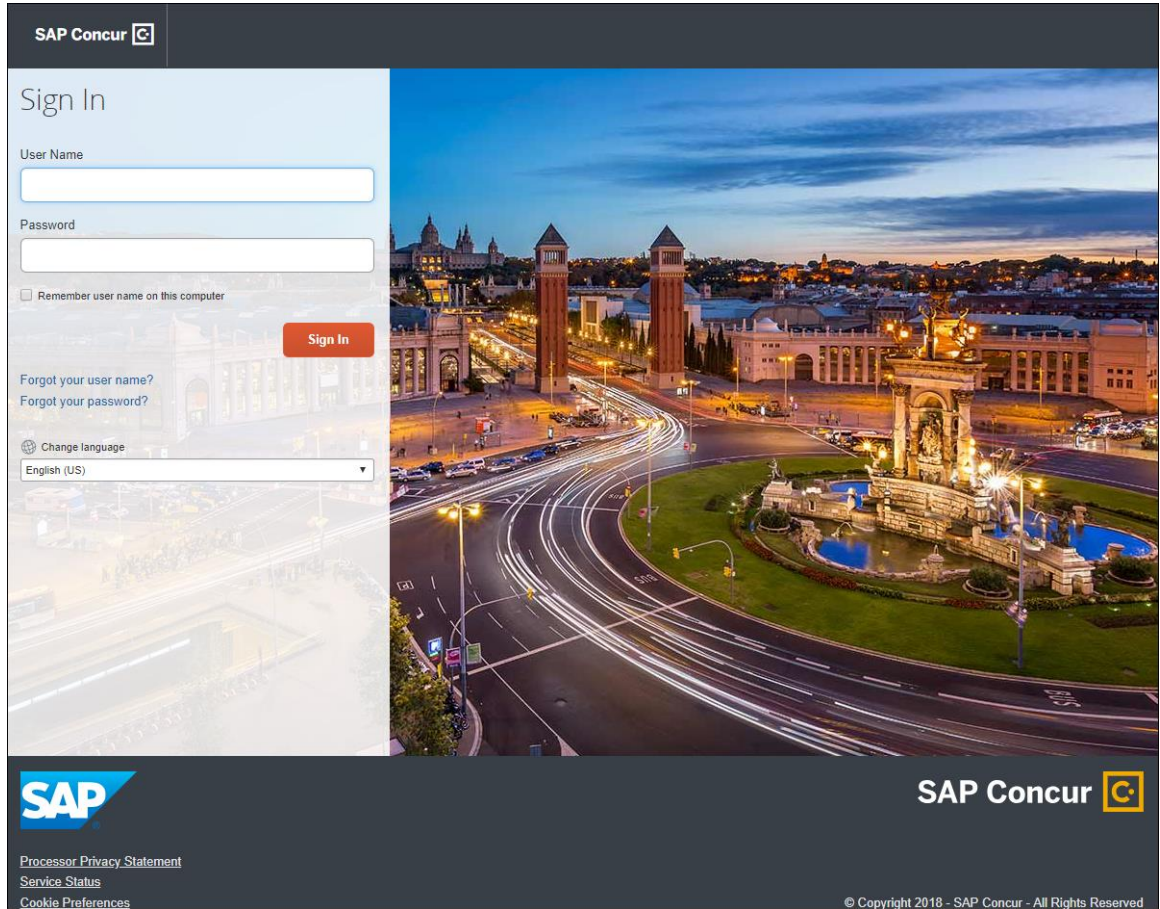
- **Two-step login:** provides enhanced security, meets current industry standards, and provides a better login success rate
- **Multi-account login:** allows administrators to log in with multiple accounts
- **Password hint removal:** provides better security for users and SAP Concur
- **User avatar:** enhances the user experience (planned for a future release)

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security and a faster, convenient experience for users logging in to SAP Concur products and services.

What the User Sees – Current Sign In Page

The SAP Concur **Sign In** page currently appears with **User Name** and **Password** fields, and a **Sign In** button. Once a user is authenticated, the SAP Concur **Home** page appears.



What the User Sees – New Sign In Page

The new SAP Concur **Sign In** page will have an **Email or Username** field and a **Continue** button. The user will type in their email or username. The user can select the **Remember me on this computer** check box, so their email or username displays the next time they log in to SAP Concur. The user will then click **Continue**.

SAP Concur

Sign In

Email or Username

username@company.com

☐ Remember me on this computer

[Forgot username?](#)

Continue

Change Language

English

SAP

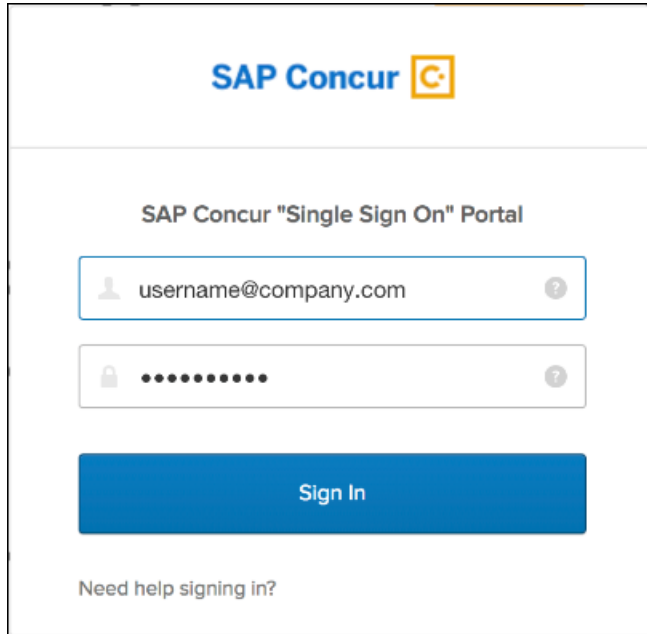
Processor Privacy Statement

SAP Concur

Depending on the customer's implementation of SAP Concur, users will then be directed to the designated Identity Provider (IdP) Single Sign-On portal or an additional **Sign In** page.

SSO USERS

When the designated Identity Provider (IdP) Single Sign-On portal appears (similar to the one shown below), the user will enter their email or username and password, then click **Sign In**.

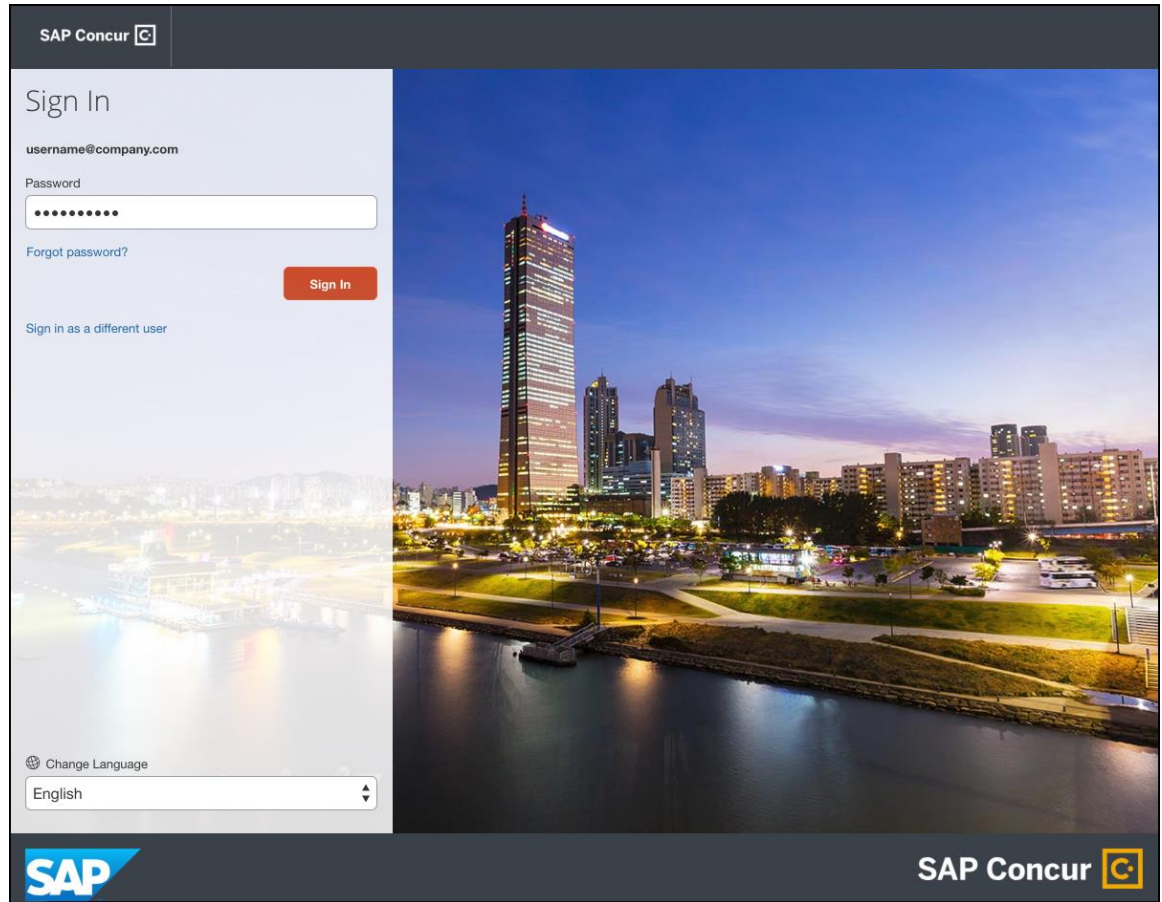


The screenshot shows the SAP Concur 'Single Sign On' Portal. At the top is the SAP Concur logo. Below it, the title 'SAP Concur "Single Sign On" Portal' is centered. There are two input fields: the first for a username (containing 'username@company.com') and the second for a password (represented by dots). Both fields have a question mark icon to the right. Below the fields is a large blue 'Sign In' button. At the bottom left, there is a link that says 'Need help signing in?'.

After being authenticated, the user will be directed to the SAP Concur **Home** page.

USERS WITH USERNAMES AND PASSWORDS

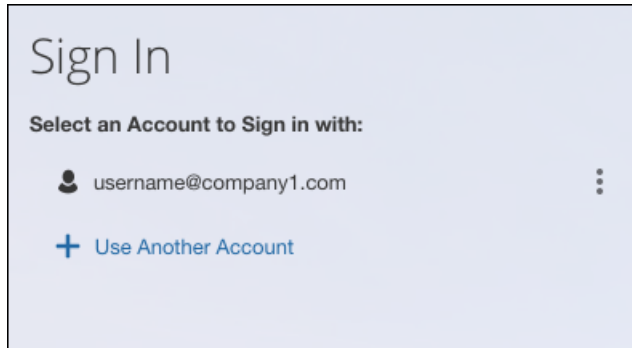
The user will be directed to an additional **Sign In** page. The user will enter a password and click **Sign In**. The system will then authenticate the user's credentials.

The image shows the SAP Concur Sign In page. The page has a dark header with the SAP Concur logo. The main content area is split into two sections. The left section is a light blue box containing the 'Sign In' heading, a username field with the placeholder 'username@company.com', a password field with masked characters, a 'Forgot password?' link, a red 'Sign In' button, and a 'Sign in as a different user' link. At the bottom of this box is a 'Change Language' dropdown menu set to 'English'. The right section is a large image of a city skyline at night, featuring a prominent skyscraper. The SAP logo is in the bottom left corner, and the SAP Concur logo is in the bottom right corner.

Once the user's password is verified, the SAP Concur **Home** page appears.

RETURN USERS

If a returning user selected the **Remember me on this computer** check box during their initial login session, they will see their email or user name display on the **Sign In** page. Users who did not select the **Remember me on this computer** check box will log in as they did initially.



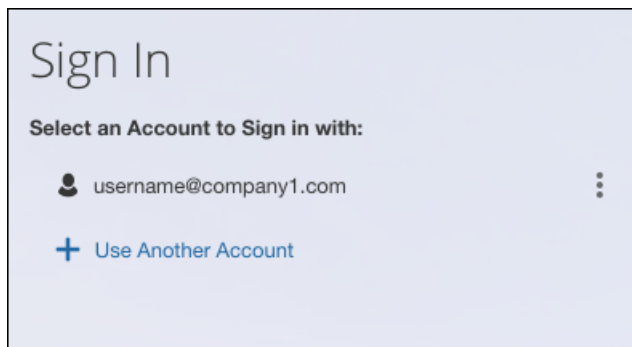
The user will click on their email or username, and then one of the following occurs:

- **SSO Users:** The user will be directed to the SAP Concur **Home** page.
- **Users with Usernames and Passwords:** On the **Sign In** page, the user will enter as password and then click **Sign In**. The user will then be directed to the SAP Concur **Home** page.

USERS WITH MULTIPLE ACCOUNTS

SAP Concur users with multiple login accounts have more than one login option depending on the user role or account they want to use. The user will first log in to SAP Concur using one of their accounts. Once successfully logged in, the user logs out of the system.

To add another account, on the **Sign In** page, the user clicks the **Use Another Account** link.

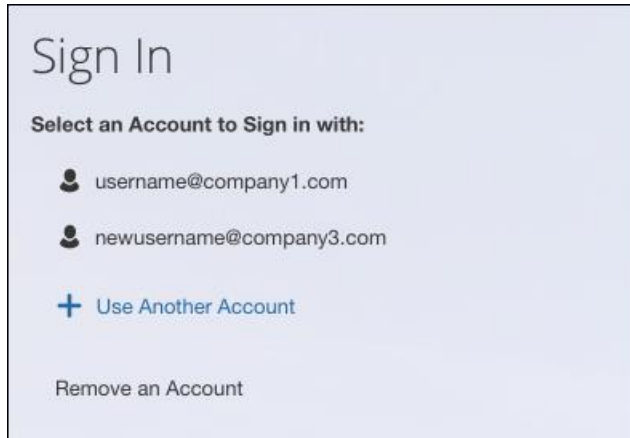


The next login step depends on the account type the user wishes to use:

- **SSO Account:** If the user selects an account with SSO credentials, the user will enter an email, then the user will be directed to the IdP Single Sign-On portal. Once the user is authenticated, the SAP Concur **Home** page appears.

- **Username and Password:** The user is directed to an additional **Sign In** page to enter a password. The user then clicks **Sign In**. Once the user is authenticated, the SAP Concur **Home** page appears.

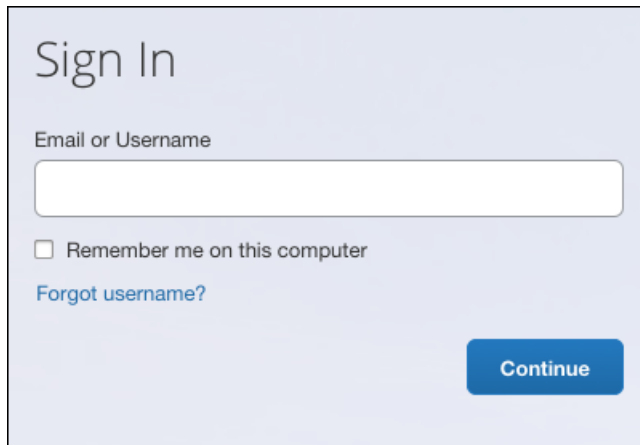
When all accounts are added, a return user will select the account they want to use to log in to SAP Concur.



The screenshot shows a 'Sign In' page with a light blue background. At the top, the text 'Sign In' is displayed. Below it, the instruction 'Select an Account to Sign in with:' is shown. There are two account entries, each with a person icon and an email address: 'username@company1.com' and 'newusername@company3.com'. Below these entries is a blue plus icon followed by the text 'Use Another Account'. At the bottom, there is a link that says 'Remove an Account'.

FORGOT USER NAME

If a user forgets their user name, the user will click the **Forgot username?** link on the **Sign In** page.



The screenshot shows a 'Sign In' page with a light blue background. At the top, the text 'Sign In' is displayed. Below it, the text 'Email or Username' is shown above a white input field. Below the input field is a checkbox labeled 'Remember me on this computer'. Below the checkbox is a blue link that says 'Forgot username?'. At the bottom right, there is a blue button with the text 'Continue'.

Next, the **Forgot User Name** page appears, and the user will enter their email and click **Send** to have an email sent to a verified email account. This email will contain their user name.

SAP Concur

Forgot User Name

Enter the email address associated with your account. We will send an email with your user name.

Email

Cancel Send

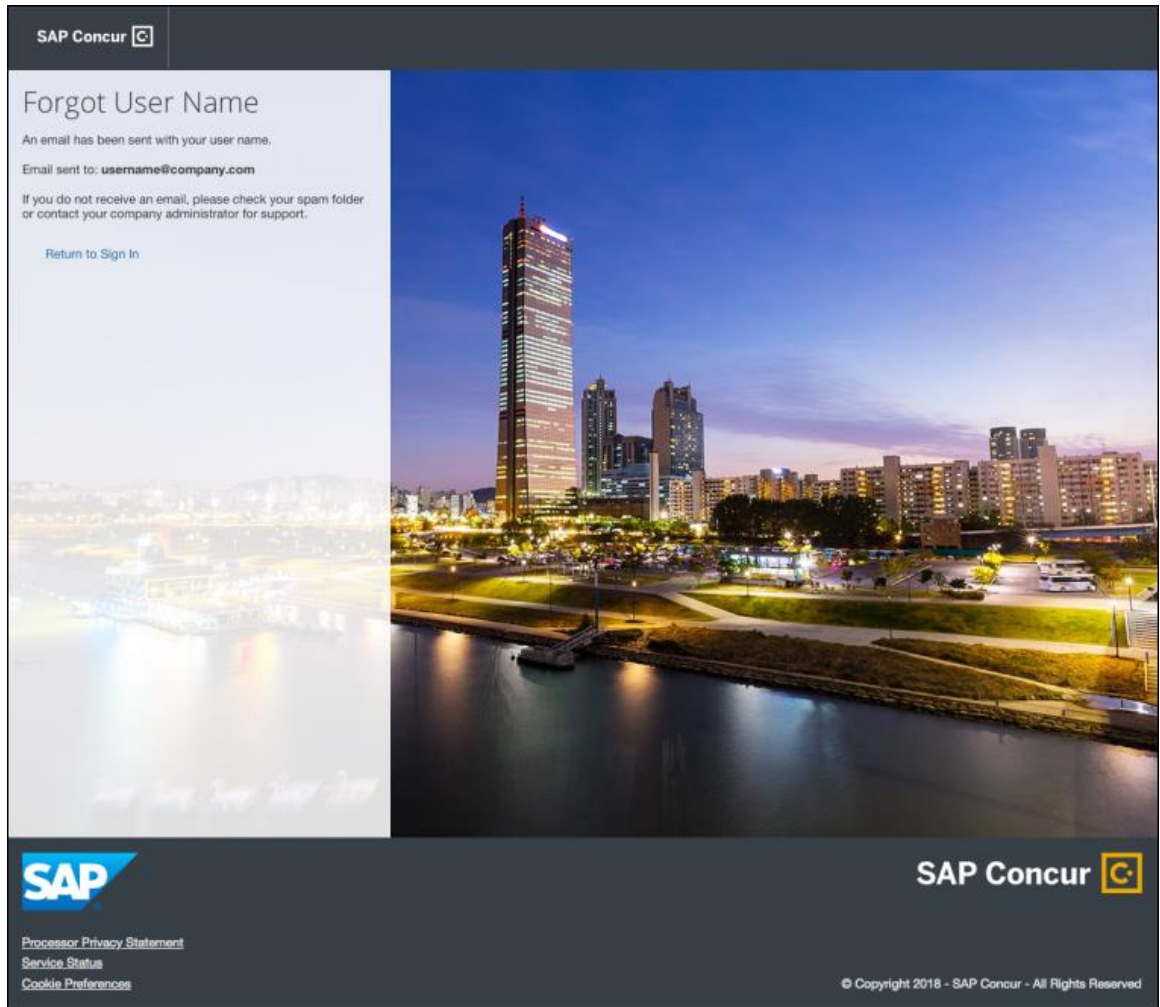
SAP

[Processor Privacy Statement](#)
[Service Status](#)
[Cookie Preferences](#)

SAP Concur

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The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



INVALID PASSWORD

If a user forgets their password, an on-screen message will appear alerting the user. The user will then click **Send** to have a password reset email sent to their verified email account.

SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

SAP Concur

Forgot Password

Enter the email address or username associated with your account. We will send an email with a link to reset your password.

Email or Username

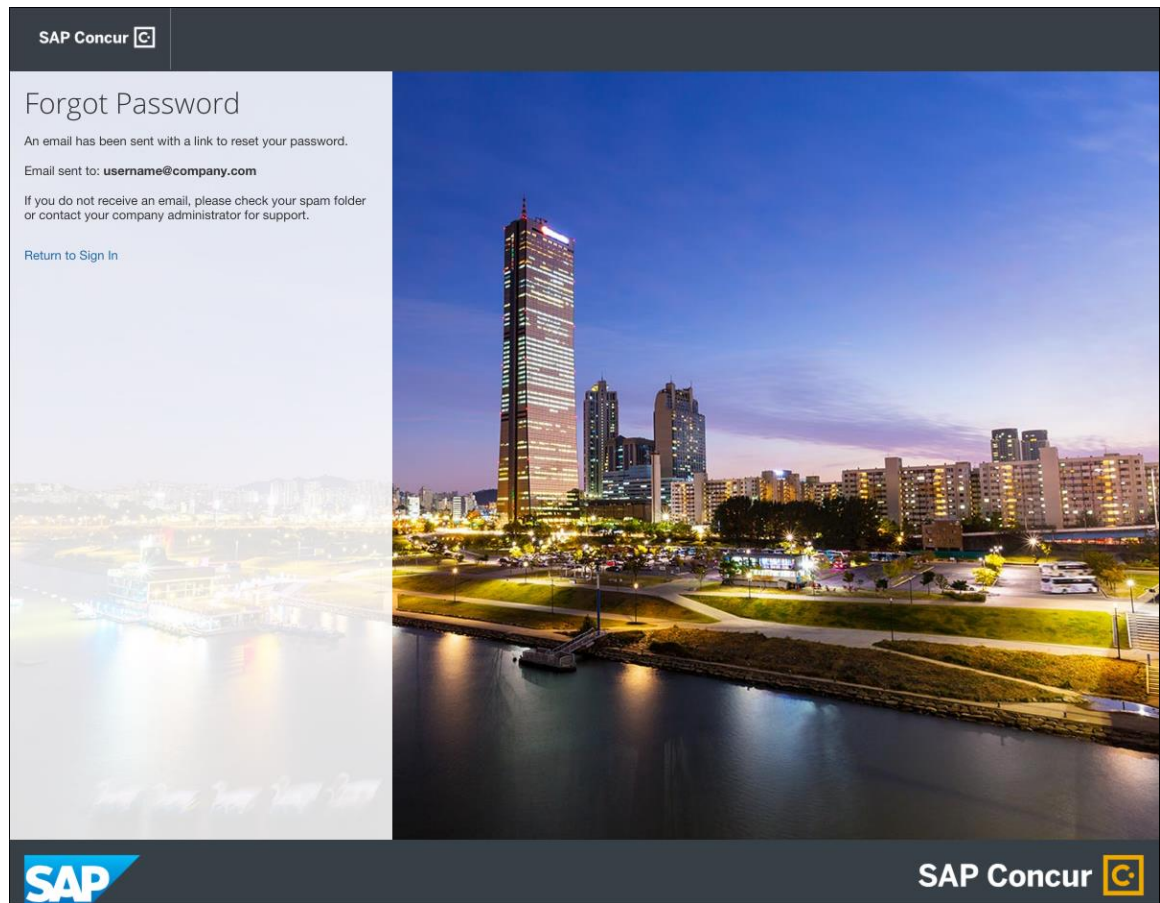
Cancel Send

SAP

Processor Privacy Statement

SAP Concur

The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



Configuration / Feature Activation

Configuration information will be provided in a future release note.

Budget

****Planned Changes** Workflows for Budget**

Overview

In a future release, workflows will be available for Budget. Workflows define how the system routes invoices, expense reports, and requests through approval and processing steps. SAP Concur's flexible workflow feature for Budget allows companies to design workflows specifically tailored to their unique needs.

Without budget review, budgets may become fully consumed well before the end of a period or year leaving an organization with limited options and budget owners with, for example, exceeded budgets. In addition, early spending means that more

important (to the organization) spending will be declined because lesser important spending consumed the budget early on.

Combining budget review in the workflow adds value. Audit rules and workflow step rules can help organizations to add in controls when it makes sense to fine tune to an organization's specific needs.

Equally important is the determination when a spending item is regarded as committed toward a budget. In most organizations, the commit is when a spending item is paid; it went through most if not all approval steps. In other organizations, the commit occurs much earlier. As soon as a purchase request or an authorization request is approved it is regarded as "promised".

BUSINESS PURPOSE / CLIENT BENEFIT

This feature will provide clients with control over the budget spend to, for example, avoid exceeded budgets too early in a budget period or budget year.

Configuration / Feature Activation

The administrator needs to configure this feature on the **Workflows** page by clicking **Administration > Invoice** or **Expense**.

Budget Insight

****Planned Changes** Budget Insight (Legacy) to Retire in 2019**

Overview

Budget Insight is a budget management tool that is being retired June 30, 2019. Clients who want to use budget functionality are recommended to purchase SAP Concur's new Budget product which released earlier this year. The new Budget feature offers greater functionality, an improved UI, and additional integrations with SAP Concur products. Most notably is the inclusion of additional expense data from Concur Expense, Concur Invoice, Concur Travel and Concur Request (previously only data from Concur Expense and Concur Request were available).

NOTE: Clients should note that migrating from Budget Insight to Budget is not possible. Their current contract for Budget Insight will be terminated and they will be re-contracted on Budget, which requires a new implementation. However, clients will still have access to all Budget Insight functionality and data during re-implementation of Budget. If clients would like to implement the new Budget product, they should contact their SAP Concur account team.

BUSINESS PURPOSE / CLIENT BENEFIT

The retirement of Budget Insight will provide clients with the opportunity to purchase SAP Concur's new Budget product that gives greater value to clients by making budgets visible, actionable, and near real-time.

Configuration / Feature Activation

When Budget Insight retires, clients will no longer be able to report issues and receive support for this product.

Company Administration

****Planned Changes** Single Sign-On (SSO) Self-Service Option Coming to SAP Concur**

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur products which provides SAP Concur clients with a self-service option for setting up SSO for their organization. SSO is currently supported for Concur Expense, Invoice, Request, and Travel.

Other SAP Concur products and services are outside the scope of this initial release.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Administration > Company > Company Admin** page.

NOTE: This new feature does not affect Travel clients who are already using the Security Keys feature.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides SAP Concur clients with a self-service option for setting up SSO.

Configuration / Feature Activation

Configuration information will be coming in a future release note.

Expense Pay – Global

****Planned Changes** (USD) New Payment Processing Partner: WUBS**

Overview

Public sector clients will be able to use Western Union Business Solutions (WUBS) to process their United States Dollar (USD) payments.

The Expense Pay – Global product functions the same way regardless of which payment-processing partner your funding account is configured to use. What is different about WUBS compared to Bambora (or classic Expense Pay) is how your funding accounts are setup in Concur Expense. Each payment-processing partner has unique forms that must be completed, submitted, and approved as part of the onboarding process.

NOTE: Company cards supported for payment-processing partners are not partner-specific.

BUSINESS PURPOSE / CLIENT BENEFIT

This additional payment-processing partner increases the value of our Expense Pay – Global offering.

What the Admin Sees

When enabled, you may create a new WUBS global funding account. The user interface will display an imbedded WUBS onboarding application form. Western Union retains control over the design and maintenance of the onboarding application form.

EXAMPLE

Funding Account

Western Union Business Solutions Registration

Business Information

** or ** indicates a mandatory field*

Information About You

I wish to submit an application for a:*

Choose One...

First Name:*

Middle Name:

Please provide if applicable.

Last Name:*

Date of Birth:*

Your Residential Address:*

City:*

Residential Address Country:*

United States of America

State / Province:*

Choose One...

Zip Code:*

Telephone:*

Email Address:*

Business Name:*

Business Occupation:

Website Address:

This is the website address for your business.

– Business Address

City:*

Business Address Country:*

United States of America ▼

State / Province:

Choose One... ▼

Zip Code:*

PREVIEW

SAVE/SUBMIT

NEXT

Cancel

What the User Sees

Users will see no difference in Profile. The **Bank Information** page in Profile is the same for Bambora and WUBS.

Configuration / Feature Activation

To request this feature, contact Concur Client Support.

Test User Admin

****Planned Changes** Retiring the Purge Test User Transactions Functionality**

Overview

SAP Concur is retiring the functionality in the Test User Admin feature that removes the transactions of test users from Concur Expense, Concur Invoice, Concur Travel, and Concur Request.

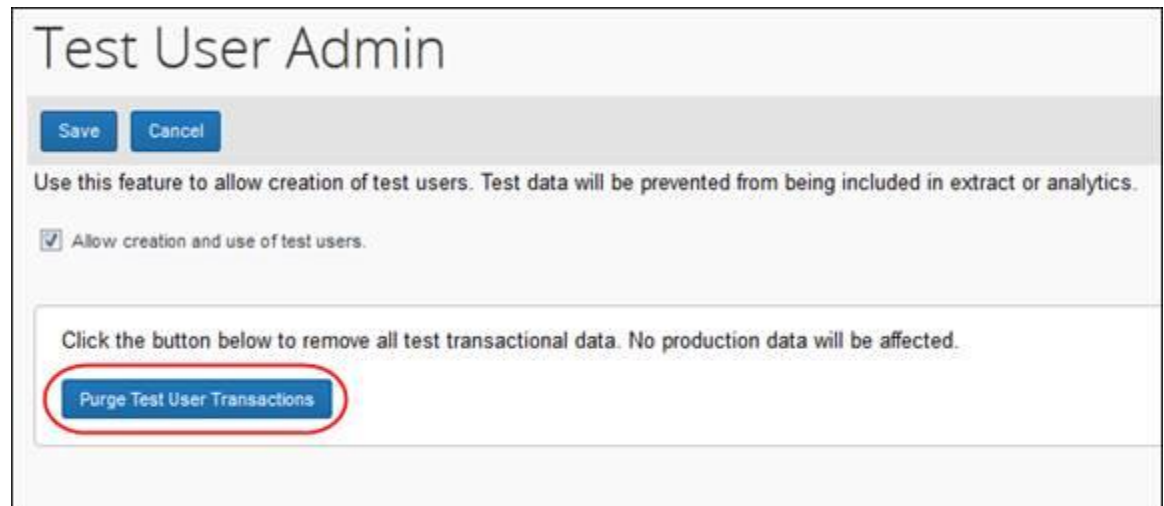
BUSINESS PURPOSE / CLIENT BENEFIT

This change will allow SAP Concur to devote more resources to development and maintenance of features that are used by many or most of our clients.

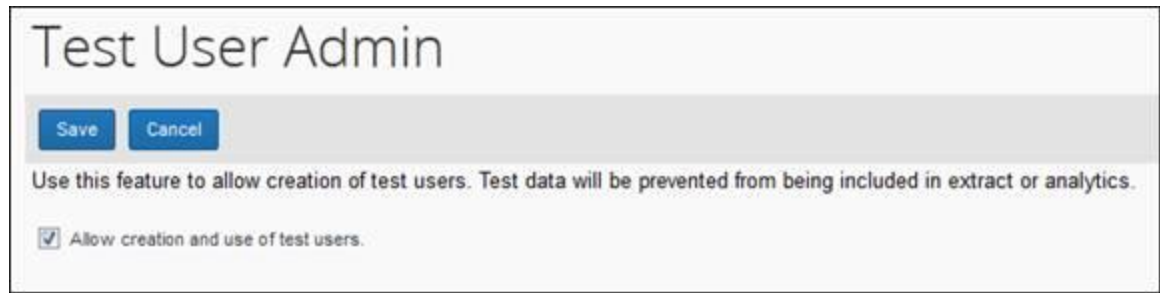
What the Admin Sees

The **Test User Admin** page will no longer display the **Purge Test User Transactions** button.

BEFORE

A screenshot of the 'Test User Admin' web interface. At the top, the title 'Test User Admin' is displayed. Below the title are 'Save' and 'Cancel' buttons. A message states: 'Use this feature to allow creation of test users. Test data will be prevented from being included in extract or analytics.' Below this is a checkbox labeled 'Allow creation and use of test users.' which is checked. At the bottom, a message says: 'Click the button below to remove all test transactional data. No production data will be affected.' Below this message is a blue button labeled 'Purge Test User Transactions', which is circled in red.

NOTE: To access the page, click **Administration > Expense** (or **Invoice** or **Requests**) > **Test User Admin**.

AFTER

Configuration / Feature Activation

The functionality will automatically be removed.



For general information about the Test User Admin feature, refer to the *Shared: Test User Setup Guide*.

Training Administration

****Planned Changes** Optimizing and Relocating the Page**

Overview

To simplify the **Training Administration** page, the page will no longer have tabs, only the current contents of the **Alternate URL** tab will remain.

In addition to this change, access to the **Training Administration** page will move from **Company Admin** to **Tools**.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes make the page easier to find and use.

What the Admin Sees

The **Training Configuration** page displays only a field for providing your users with an alternate Training URL.

BEFORE

Display Order	Type	Name
↓	Simulation	Logging on to Concur
↓ ↑	Simulation	Updating Your Travel Profile
↓ ↑	Simulation	Exploring the Concur Home Page

NOTE: To access the page before this change, click **Administration > Expense** (or **Invoice** or **Requests**) > **Training Administration**.

AFTER

By default, when a user clicks Training on the Help menu, the Concur training site displays. If you want your users to access your company's training site instead, enter your URL in the field below.

Example: <http://training.YourSite.com/training.htm>

If you want to resume using the Concur training site, clear this field and save.

NOTE: To access the page after this change, click **Administration > Company > Tools > Training Administration**.

Configuration / Feature Activation

The change will be automatically available; there are no additional configuration or activation steps.



For general information about the Training Administration feature, refer to the *Shared: Training Administration Setup Guide*.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

The screenshot displays the SAP Concur Online Help interface for Admins. The top navigation bar includes the SAP Concur logo and various menu items: Requests, Travel, Expense, Invoice, Approvals, Reporting, App Center, and Links. A 'Help' dropdown menu is open, showing options like Training, Expense Help, and Expense Administration Help. The main content area is titled 'Using Online Help' and contains a sidebar with links to 'Resources for Administrators - Professional Edition', 'Expense Professional Administration Guides', and 'Budget Insight (Legacy) Administration Guide'. The main content area also includes 'Quick Links - Concur Professional/Premium' and a table of 'Expense Setup Guides'.

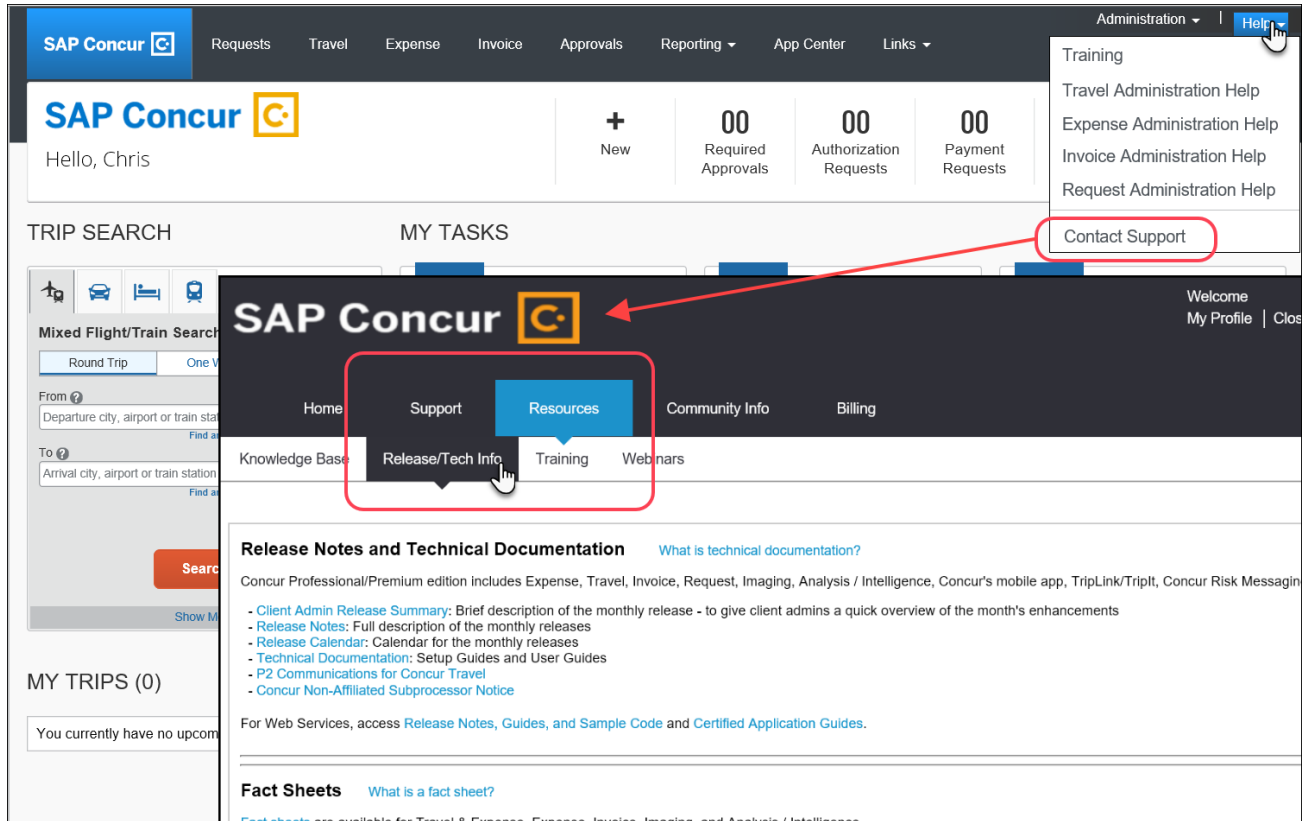
Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

SAP Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the SAP Concur support portal.

Additional Release Notes and Other Technical Documentation : SAP Concur Support Portal – Selected Users

If a user has the proper SAP Concur support portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the support page, the user clicks **Resources > Release/Tech Info**.



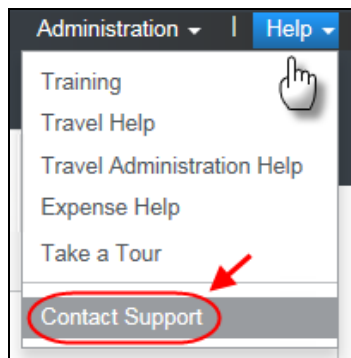
Cases

Steps for Getting a Status

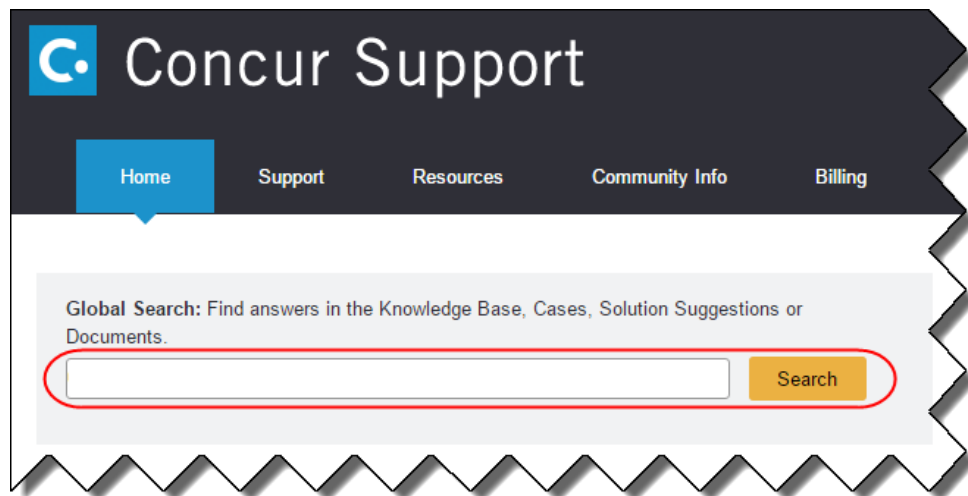
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
2. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

3. Enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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SAP Concur Release Notes Expense Professional / Premium Expense, Imaging, Expense Pay, Expense Report Auditing, Cards, Imports/Extracts, ExpenseIt	
Month	Audience
Release Date: December 8, 2018 Initial Post: Friday, December 7, 10:00 AM PT	Client FINAL

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Release Notes

Admin

****Ongoing** Updated Email Format**

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, consistent look-and-feel across all SAP Concur services.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent is to provide a consistent, updated look for users.

IMPORTANT

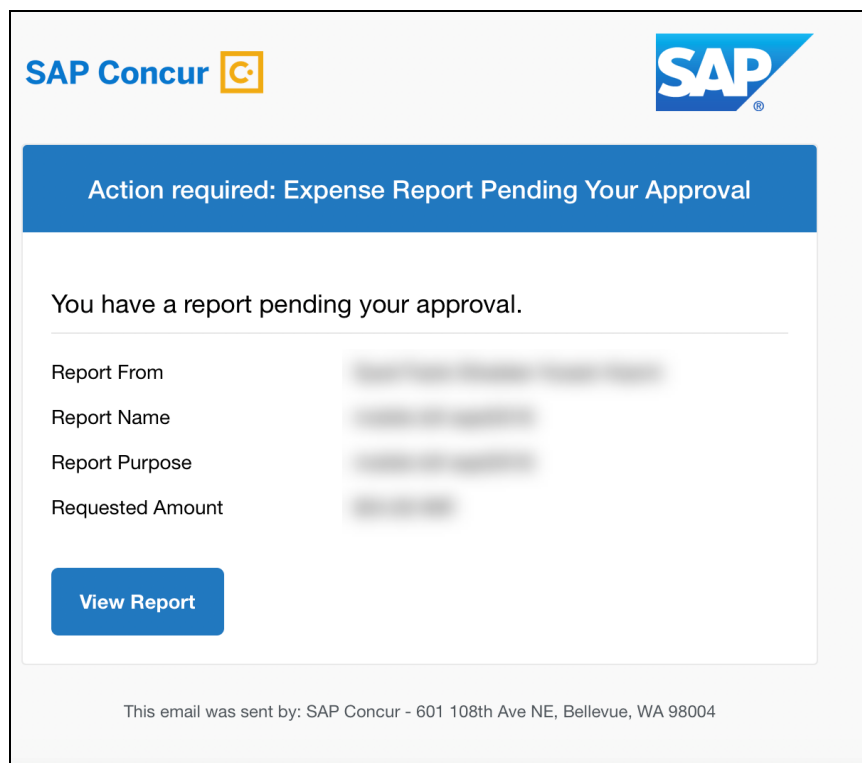
Note the following:

- Be aware that the email content has not changed – just the look and feel.
- The changes will appear over time. Each product team (Expense, Invoice, Travel, etc.) decides when to use the new format. Timing will be based on resource availability and the priority of other scheduled enhancements.
- Do not expect that all product emails will change at the same time. For example, perhaps Expense approval email will be first, and then other Expense notifications will follow.
- There is no assigned end date to the project. Expect that the changes may take longer than a year.
- Each team will provide release notes when their new emails are scheduled to appear.

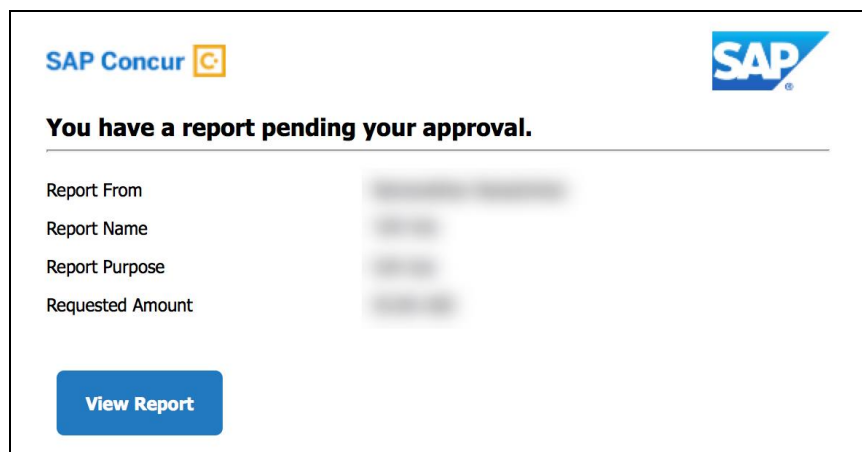
What the User Sees

The Expense approval email is shown below. Over time, all email generated from SAP Concur will have a similar look.

New email format:



Current email format:



Configuration / Feature Activation

This change will occur, over time, automatically; there are no additional configuration or activation steps.

Add IP Addresses to Safe Sender List

Overview

SAP Concur is transitioning to a new email infrastructure for outbound email from our products to SAP Concur users. Because of this, companies who filter inbound email based on the sending IP address must add the new IP addresses to their Safe Sender list to ensure that their users receive email from SAP Concur.

Concur Expense Only

Be aware that – at this time – the issue described here affects only companies that use Concur Expense **and** filter incoming email based on IP addresses. (This includes all editions of Expense – whether the company uses Concur Expense by itself or integrated with any other SAP Concur product or service.) Other SAP Concur services (such as Travel and Concur Pay) are not currently affected.

We are currently targeting the first quarter of 2019 to make additional changes. Please monitor the release notes for more information about the timing of the additional changes.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If you use Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure any required Safe Sender lists for IP addresses are updated so that your users continue to receive SAP Concur email without interruptions.

Approval Emails

Retirement of Approve or Reject via Email (December 11, 2018)

Overview

For companies that use this feature, its retirement means that the content of the emails that are currently received by their users who approve expense reports will change.

NOTE: Companies who use this feature receive approval emails from ExpenseApproval@concursolutions.com. After this feature is retired, all approval emails will come from AutoNotification@concursolutions.com.

BEFORE DECEMBER 11, 2018

When enabled, this feature allows an approver to approve (or reject) an expense report by replying to the email.

AFTER DECEMBER 11, 2018

After this feature is retired, the approver can approve the report using either the SAP Concur mobile app or www.concursolutions.com.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will close a security gap and allow SAP Concur to devote more resources to features that are used by many or most of our clients.

What the Approver Sees

The approver will no longer see instructions to reply to the email.



You have a report pending your approval.

Report From	Chris Miller
Report Name	PacCo
Report Purpose	Annual Conference
Requested Amount	100.00 USD

To **approve** this expense report via email reply:

1. Reply to this email to send it back to Concur Travel & Expense at: ExpenseApproval@[REDACTED].com
2. Type the following as the first line of the reply email message: **Approve**
3. **Do not add or change any other information in the original email or in the reply.**

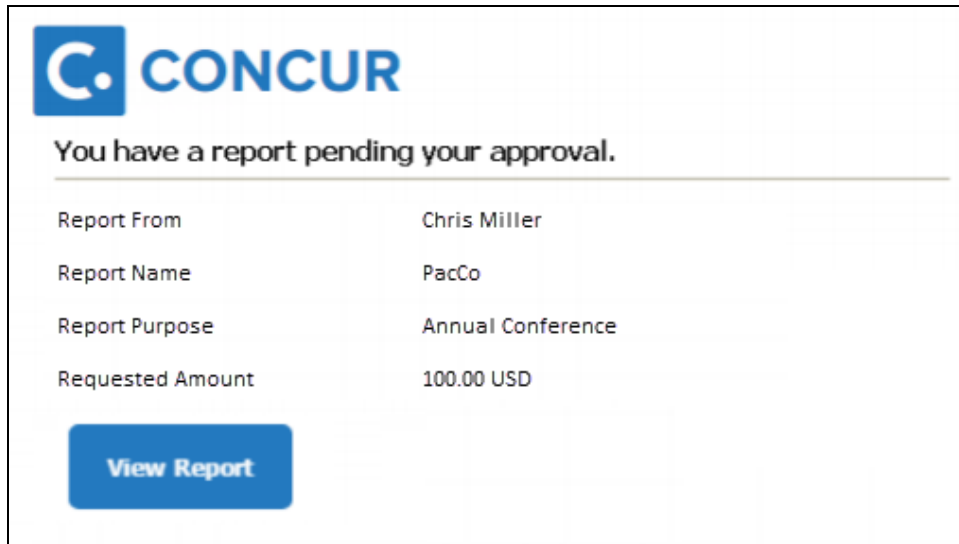
To **send this expense report back to the employee** via email reply:

1. Reply to this email to send it back to Concur Travel & Expense at: ExpenseApproval@[REDACTED].com
2. Type the following as the first line of the reply email message: **Reject**
3. **Do not add or change any other information in the original email or in the reply.**

Link To Approve Report

<http://www.concursolutions.com>

The approver will continue to see information about the report and a link to view the report using www.concursolutions.com.



The screenshot shows the Concur logo at the top left. Below it, a message states: "You have a report pending your approval." This is followed by a table with the following details:

Report From	Chris Miller
Report Name	PacCo
Report Purpose	Annual Conference
Requested Amount	100.00 USD

At the bottom of the table is a blue button labeled "View Report".

Configuration / Feature Activation

The functionality will be automatically disabled; there are no deactivation steps.



For general information about this functionality, refer to the *Expense: Email Approval Setup Guide*.

Expense Assistant

Expense Assistant Can Create Trip-Based Expense Reports

Overview

Expense Assistant can automatically create trip-based expense reports and add trip-based expenses to these expense reports. Currently, Expense Assistant automatically creates monthly expense reports as a user's expenses flow into Concur Expense. This is known as creating a calendar-based expense report.

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

The type of expense reports created by Expense Assistant is defined at the group level.

This functionality was made generally available for the existing Expense user interface on November 17th. ***For users using the NextGen Expense user interface, the user onboarding messaging was made generally available on November 28th.***

BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

A new field, **For Expense Assistant, allow users to opt out or to use**, is added to the **Configuration for Group** page (**Administration > Expense > Group Configuration > Expense tab**).

With this field, you can determine whether users in a group will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

For Expense Assistant, allow users to opt out or to use:

- Monthly only
- Monthly or By Trip
- Monthly only
- By Trip only
- None

setting cannot be revoked once granted)

☒ Allow user to upload XML tax receipts.

☐ Utilize rich card data for receipts handling

Cash Advance Configurations

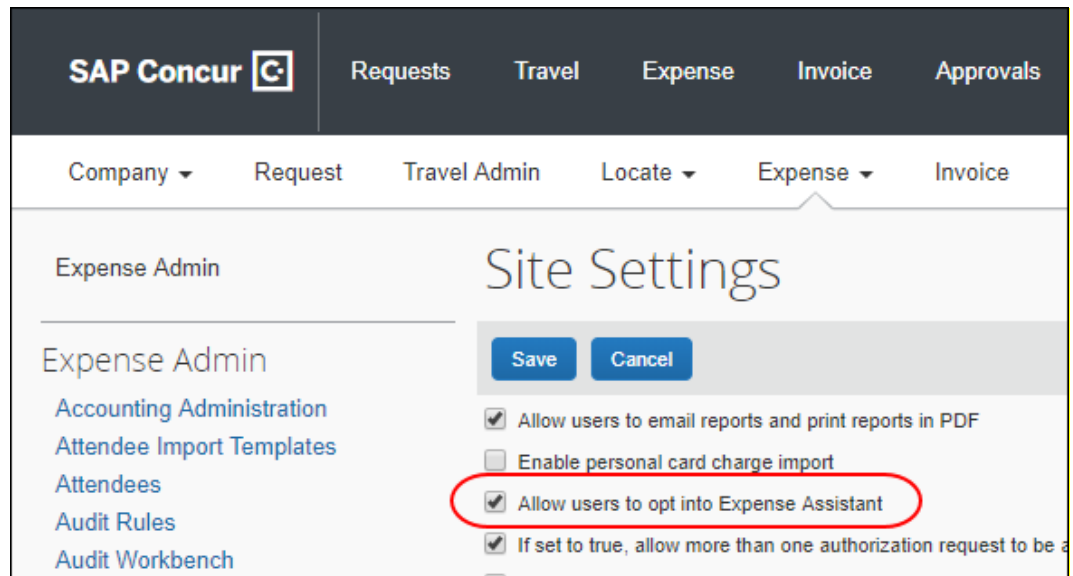
Cancel Save

As an Expense admin, you can allow your users within a group to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users within a group and designate the calendar-based or trip-based option to meet your company's policy.

NOTE: To see the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page, the **Allow users to opt into Expense Assistant** check box must be selected (enabled) on the **Site Settings** page (**Administration > Expense > Expense Admin > Site Settings**).

The **For Expense Assistant, allow users to opt out or to use** field will not display on the **Configuration for Group** page if the **Allow users to opt into Expense Assistant** check box is not selected (disabled).



The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

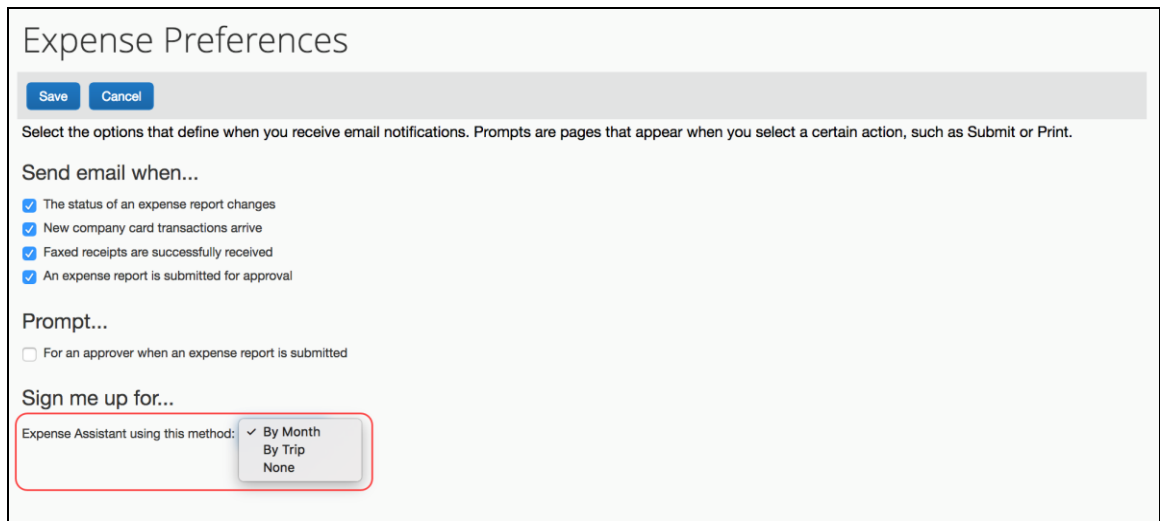
- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users in the group.

What the User Sees - Existing UI

If the user is using the existing UI (has not yet moved to NextGen Expense), once Expense Assistant is enabled for your company, and the user group setting is *Monthly or By Trip or Trip Only*, users will need to enable trip-based Expense Assistant for themselves.

There is one way a user can enable Expense Assistant: from Profile.

On the **Expense Preferences** page (**Profile > Profile Settings**), users select from the Expense Assistant using this method: [list of available options] list, and then click **Save**.



The screenshot shows the 'Expense Preferences' page. At the top, there are 'Save' and 'Cancel' buttons. Below them is a description: 'Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.' The page is divided into three sections: 'Send email when...', 'Prompt...', and 'Sign me up for...'. The 'Send email when...' section has four checked checkboxes: 'The status of an expense report changes', 'New company card transactions arrive', 'Faxed receipts are successfully received', and 'An expense report is submitted for approval'. The 'Prompt...' section has one unchecked checkbox: 'For an approver when an expense report is submitted'. The 'Sign me up for...' section has a dropdown menu labeled 'Expense Assistant using this method:' with three options: 'By Month' (selected), 'By Trip', and 'None'. The dropdown menu is highlighted with a red box.

Once enabled by a user, for trip-based Expense Assistant, the following message appears and confirms that feature is on: **"All incoming expenses that occur between your trip start and end date will be placed on a trip-related report. Turn off Expense Assistant."**

Manage Expenses

ACTIVE REPORTS


Create New Report

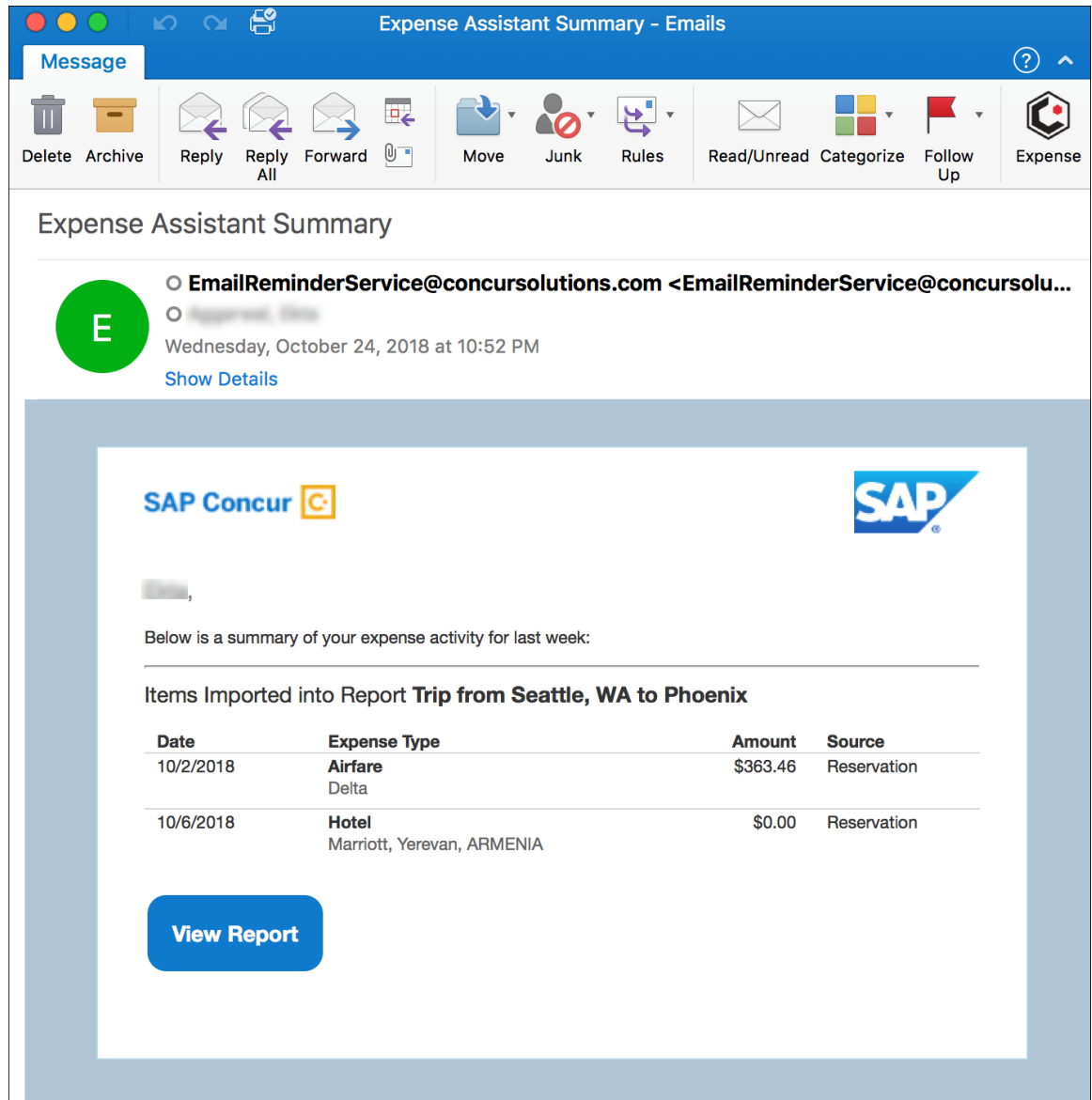
NOT SUBMITTED

Trip to San Francisco
05/08/2018

\$630.00

All incoming expenses that occur between your trip start and end date will be placed on a trip-related report. [Turn off Expense Assistant](#)

Since trip-based expense assistant may create expense reports at different times each month, Concur Expense sends the user a summary email when a trip-based expense report is created (if prior to trip start date). After that, Concur Expense sends a weekly email that summarizes the activity that occurred in the auto-created expense report after the trip began.



What the User Sees – NextGen Expense

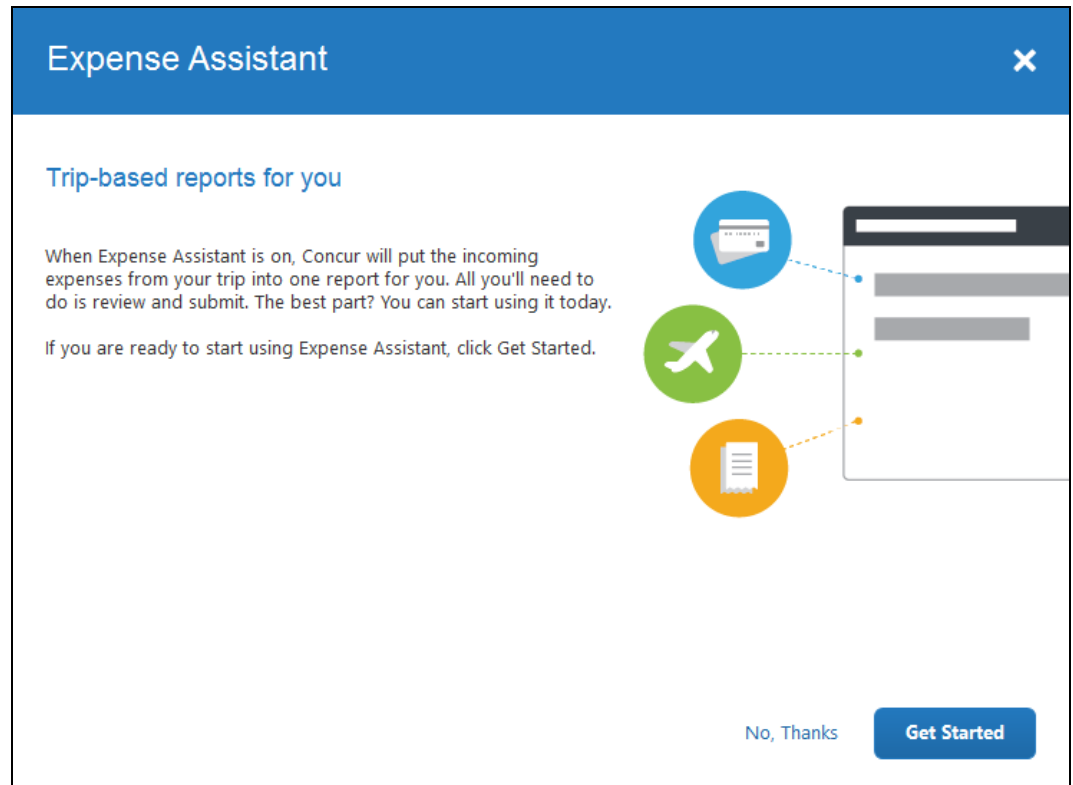
ENABLE EXPENSE ASSISTANT

If the user is using NextGen Expense and if the user has at least one unexpensed travel segment (itinerary) in **Available Expenses**, the **Expense Assistant** page appears.

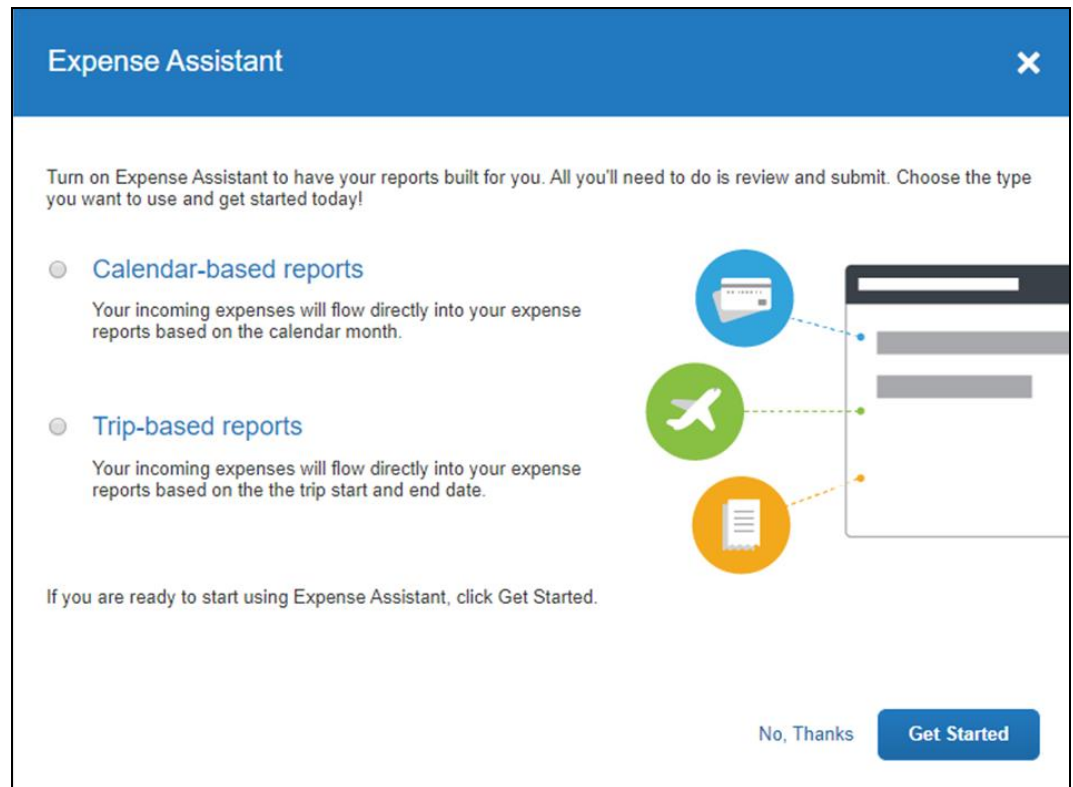
There are three ways a user can enable Expense Assistant: when they have Available Expenses, whether or not they have any Available Expenses, and from Profile.

- When your users log on to Concur Expense and go to the Expense home page, they will see the following screen. Since Concur Expense needs some available expenses and an unexpensed travel segment (itinerary) present to show how it works, this will show at the first time the user logs in and has available expenses to be used.

- ♦ If the admin selected *By Trip only* in the **For Expense Assistant, allow users to opt out or to use** list in Group Configuration (described above), then the **Expense Assistant** page that appears allows the user to select whether or not to use the feature.



- ♦ If the admin selected *Monthly or By Trip* in the **For Expense Assistant**, **allow users to opt out or to use** list in Group Configuration (described above), then the **Expense Assistant** page that appears allows the user to select trip-based, calendar-based, or neither.



Expense Assistant [X]

Turn on Expense Assistant to have your reports built for you. All you'll need to do is review and submit. Choose the type you want to use and get started today!

☐ **Calendar-based reports**
Your incoming expenses will flow directly into your expense reports based on the calendar month.

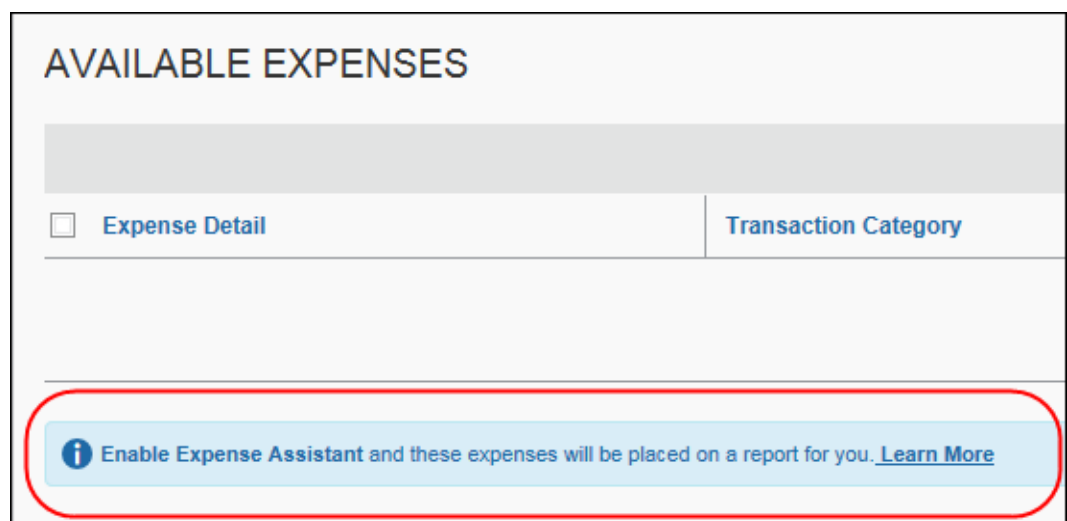
☐ **Trip-based reports**
Your incoming expenses will flow directly into your expense reports based on the the trip start and end date.

If you are ready to start using Expense Assistant, click Get Started.

No, Thanks **Get Started**

-Or-

- If users do not currently have any available expenses or an unexpensed travel segment (itinerary), they will see the following message in the **Available Expenses** section:



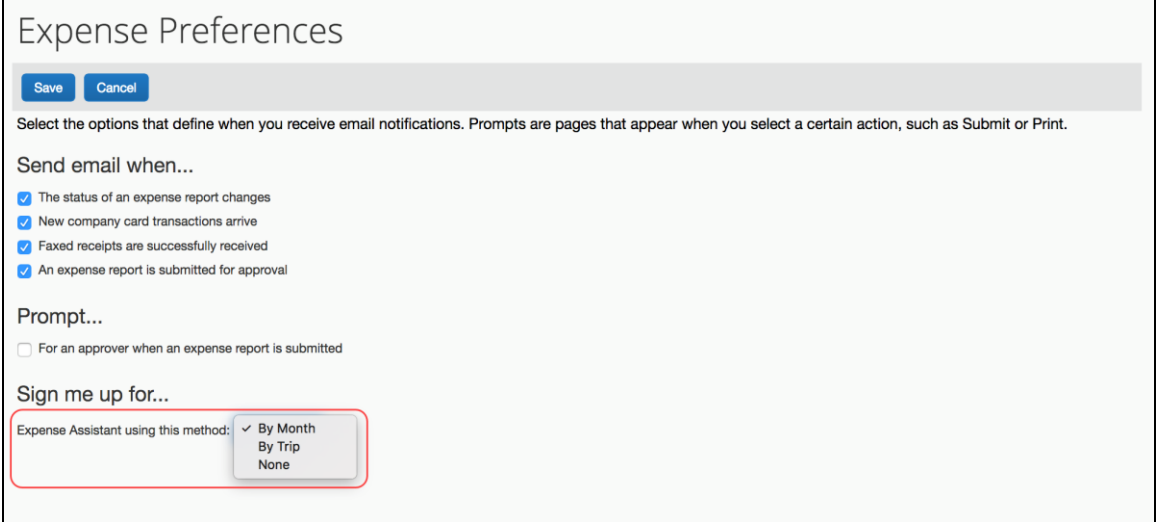
AVAILABLE EXPENSES

☐ Expense Detail	Transaction Category
i Enable Expense Assistant and these expenses will be placed on a report for you. Learn More	

The users need to click **Learn More**, and then click **Get Started** to begin using Expense Assistant.

-Or-

- If the user wants to enable Expense Assistant and the pages shown above do not appear automatically, the user can enable the feature in Profile. On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects *By Month* or *By Trip* from the **Expense Assistant using this method** list, and then clicks **Save**.



Expense Preferences

[Save](#) [Cancel](#)

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

- ☒ The status of an expense report changes
- ☒ New company card transactions arrive
- ☒ Faxed receipts are successfully received
- ☒ An expense report is submitted for approval

Prompt...

☐ For an approver when an expense report is submitted

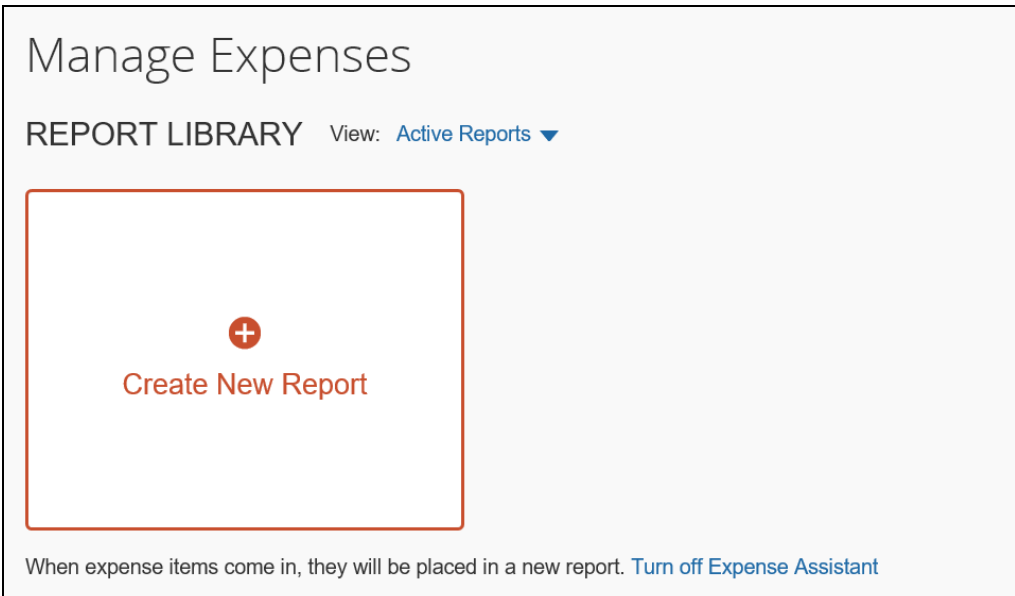
Sign me up for...

Expense Assistant using this method: ☒ By Month ☐ By Trip ☐ None

DISABLE EXPENSE ASSISTANT

The user can disable Expense Assistant two ways:

- On the **Manage Expenses** page, the user clicks **Turn Off Expense Assistant** below the report library.



Manage Expenses

REPORT LIBRARY View: [Active Reports](#) ▼

[+](#)
Create New Report

When expense items come in, they will be placed in a new report. [Turn off Expense Assistant](#)

- On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects *None* from the **Expense Assistant using this method** list, and then clicks **Save**.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, the feature is automatically selected (enabled) on the **Site Settings** page for the company, making the feature available to your users.

⚠ IMPORTANT: Admins with the Expense Configuration Administrator (Restricted) role will need to contact SAP Concur support if they want to change their Expense Assistant setting.

ALREADY IN USE

For example, if you use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain selected (enabled) on the **Site Settings** page, and *Monthly only* will be selected in **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page.

NOT CURRENTLY IN USE

If you do not use Expense Assistant today, the **Allow users to opt into Expense Assistant** check box will remain unselected (disabled) on the **Site Settings** page, and the **For Expense Assistant, allow users to opt out or to use** field will not be displayed on the **Configuration for Group** page.

NEW CLIENTS

For all new clients, by default, the **Allow users to opt into Expense Assistant** check box is selected (enabled) on the **Site Settings** page, and *Monthly or By Trip* is

selected in the **For Expense Assistant, allow users to opt out or to use** field on the **Configuration for Group** page for all groups.



For more information, refer to the *Expense: Expense Assistant Setup Guide*.

Expense Pay

(USD/CAD) Update: Retirement of Classic Pay and Migration to Global Pay (Deadline Sept 1)

Overview

Concur's **Expense Pay** (classic) products execute payments associated with processing expense reports. To ensure compliance with ever-changing regulatory requirements, tailored to geo-diverse markets, SAP Concur has engaged dedicated, experienced, third party payment-processing partners and developed a next generation pay product: **Expense Pay – Global**.

As previously announced in these release notes (September 2017), moving forward, SAP Concur will use one Expense Pay product to service your business anywhere in the world. Concur's **Expense Pay – Global** product will replace our existing legacy **Expense Pay** (classic) offerings (including NA Pay, EMEA Pay, and next APA Pay.) For Concur clients with an **Expense Pay** product, **Expense Pay – Global** will be our go-forward product. This notification begins our sunset process for all legacy **Expense Pay** (classic) products.

EXPENSE PAY – NORTH AMERICA AND EXPENSE PAY – EMEA LIMITATIONS

SAP Concur does not support client's adding the following currencies with the classic product: United States Dollars, Canadian Dollars, Mexican Pesos, Euro, Swiss Frank, Danish Krone, Swedish Krona, or UK Pounds. If a client has already implemented and is using these currencies with the classic product, they can continue using these until they are migrated to the new platform or until the defined sunset date.

BUSINESS PURPOSE/CLIENT BENEFIT

The **Expense Pay – Global** offering maintains industry best practices for payment processing functionality within SAP Concur.

Configuration/Product Activation

Clients using USD and / or CAD payments must contact paymigration@concur.com to schedule your migration. After switching your contracted service to "Expense Pay – Global" our activation team will work with you to switch your funding from Expense Pay classic to global. You will be using the same Expense Pay service and tools that you are familiar with, like **Payment Manager**, and a ground up implementation is not required.



For general information about **Expense Pay - Global**, refer to the following product guides:

- *Expense: Expense Pay Global User Guide*
- *Expense: Payment Manager for Expense Pay Global User Guide*

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

The Japan Public Transportation (JPT) database of stations and lines received routine maintenance changes such as additions, name changes, and removals.

BUSINESS PURPOSE / CLIENT BENEFIT

Lists in Concur Expense continue to reflect JPT's current stations and lines.

What the Admin Sees

The company Administrator sees valid station names and lines listed when searching for and configuring JPT routes for commuter passes.

What the User Sees

Users will see updated names where the old names previously displayed. The commuter passes and favorite routes configured before this update that contain removed stations will continue to display those stations to accommodate expense reports in progress at the time of this update.

Configuration / Feature Activation

The database maintenance is complete; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

****Ongoing** New User Interface for Concur Expense End Users**

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

NextGen Expense is the continued evolution of the SAP Concur user experience. It was built from extensive user research and data analytics that include 680 1:1 conversations, 58 usability studies, 3,000+ survey responses, and 1.3B monthly user actions.

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

In order to take advantage of these improvements, Expense customers will be required to transition to NextGen Expense. The following provides information about the timeline and resources available to ensure this process is smooth and efficient for all users.

These UI changes apply to:

- All editions of Concur Expense (Professional/Premium and Standard)
- End users; there are no changes for approvers, processors, or admins

IMPORTANT! Timeline and Milestones

There are three important milestones for customers as they transition from the existing UI to NextGen Expense.

- **We are currently in the Preview Period:** During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

NOTE: During the Preview Period, not all features from the existing UI will be available in NextGen Expense. New features and enhancements will continue to become available. ***The Preview Period is not intended to be the final product; it is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense: All customers will be required to move to NextGen Expense.** This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

SAP Concur offers several guides, FAQs, release notes, and other resources to aid in the transition. All of the information that an organization needs to get started is available here:

- [Professional Edition](#)
- [Standard Edition](#)

The links above provide access to the following:

- **Admin guides, FAQs, transition resources:** The admin guide provides information about accessing NextGen Expense and the roles/permissions required.

Along with the admin guide, there are FAQs, other resources (such as email templates and other training materials), and a list of features that are not yet available in NextGen Expense. All of these can be used to help customers prepare their users for NextGen Expense.

NOTE: To help with training needs, customers can use the admin guide and end-user guide "as is" or they can use any part of them to create training materials. Customers can cut, copy, paste, delete, or otherwise edit either guide at will.

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

NOTE: Like the admin guide, the organization can cut, copy, paste, delete, or otherwise edit this guide at will.

- **Release information:** During the Preview Period, the release of enhancements will **not** be on the regular SAP Concur release schedule. Instead, SAP Concur provides special release notes and information about features and enhancements that are nearing release.

Get Started

Customers are encouraged to use the transition materials described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Admin

****Planned Changes** Archive Deactivated User Data**

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet customer expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for **at least three years**. The archive process moves this "deactivated" user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

USER / CUSTOMER BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for inactive user's personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that customers are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

A. SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

A. SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – they have been "marked inactive" in the SAP Concur system. A user must be deactivated for **over 3 years** without having been re-activated in order to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

A. For Professional Edition, the most significant difference would occur in **Company Admin > User Administration**.

However, once user information is archived:

- ♦ From within User Administration, if the **Use Travel Advanced Filters** option is chosen, the user will not be visible.
- ♦ From within User Administration, if the **Use Expense Advanced Filters** option is chosen, you will be able to see the user in search results as deactivated.
 - If you click the user's name, you will receive an error message: *The selected user exists in the Expense or Invoice application but the user contains conflicting or missing data. Contact Concur Client support to request help in resolving this error.*
 - If you click the icon in the **Profile** column, you will receive the generic error message.
 - If you click the user's login ID, you will see no historical login information for that user.

- ◆ If another user has the Self-Assigning Assistant permission or the user is a Proxy who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive an "switching user" error message.
- ◆ From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- ◆ These users will not have access to any of their past travel history.
- ◆ For Expense, the user would have access to their expense history if:
 - That history has not been removed by a Data Retention policy.
 - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

The change will occur automatically; there are no additional configuration or activation steps.

****Planned Changes** New SAP Concur Sign In Page**

Overview

SAP Concur is planning to add a new **Sign In** page, providing an updated login experience for users who log in with a user name and password credentials. Current Single Sign-On (SSO) users will log in without having to enter additional credentials. This feature is planned for 2019.

The new **Sign In** page feature includes the following:

- **Two-step login:** provides enhanced security, meets current industry standards, and provides a better login success rate
- **Multi-account login:** allows administrators to log in with multiple accounts
- **Password hint removal:** provides better security for users and SAP Concur
- **User avatar:** enhances the user experience (planned for a future release)

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security and a faster, convenient experience for users logging in to SAP Concur products and services.

What the User Sees – Current Sign In Page

The SAP Concur **Sign In** page currently appears with **User Name** and **Password** fields, and a **Sign In** button. Once a user is authenticated, the SAP Concur **Home** page appears.

SAP Concur

Sign In

User Name

Password

☐ Remember user name on this computer

[Forgot your user name?](#)
[Forgot your password?](#)

[Change language](#)
English (US)

[Sign In](#)

SAP

SAP Concur

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[Service Status](#)
[Cookie Preferences](#)

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What the User Sees – New Sign In Page

The new SAP Concur **Sign In** page will have an **Email or Username** field and a **Continue** button. The user will type in their email or username. The user can select the **Remember me on this computer** check box, so their email or username displays the next time they log in to SAP Concur. The user will then click **Continue**.

SAP Concur

Sign In

Email or Username

username@company.com

☐ Remember me on this computer

[Forgot username?](#)

Continue

Change Language

English

SAP

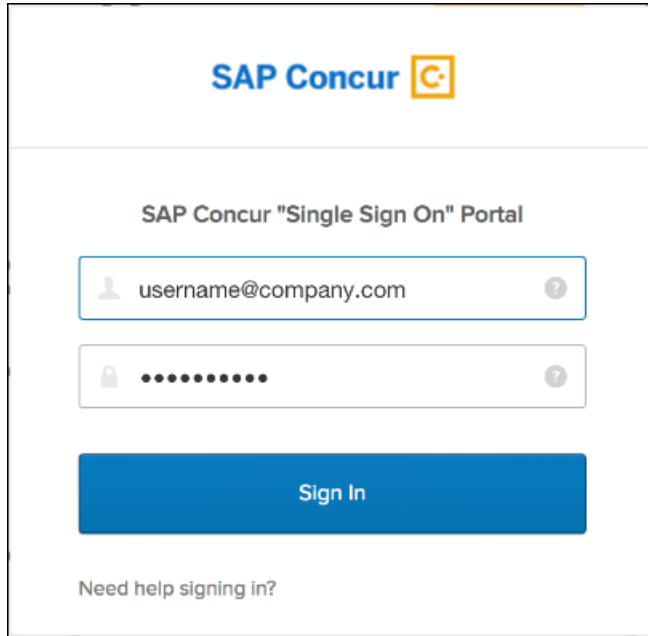
Processor Privacy Statement

SAP Concur

Depending on the customer's implementation of SAP Concur, users will then be directed to the designated Identity Provider (IdP) Single Sign-On portal or an additional **Sign In** page.

SSO USERS

When the designated Identity Provider (IdP) Single Sign-On portal appears (similar to the one shown below), the user will enter their email or username and password, then click **Sign In**.

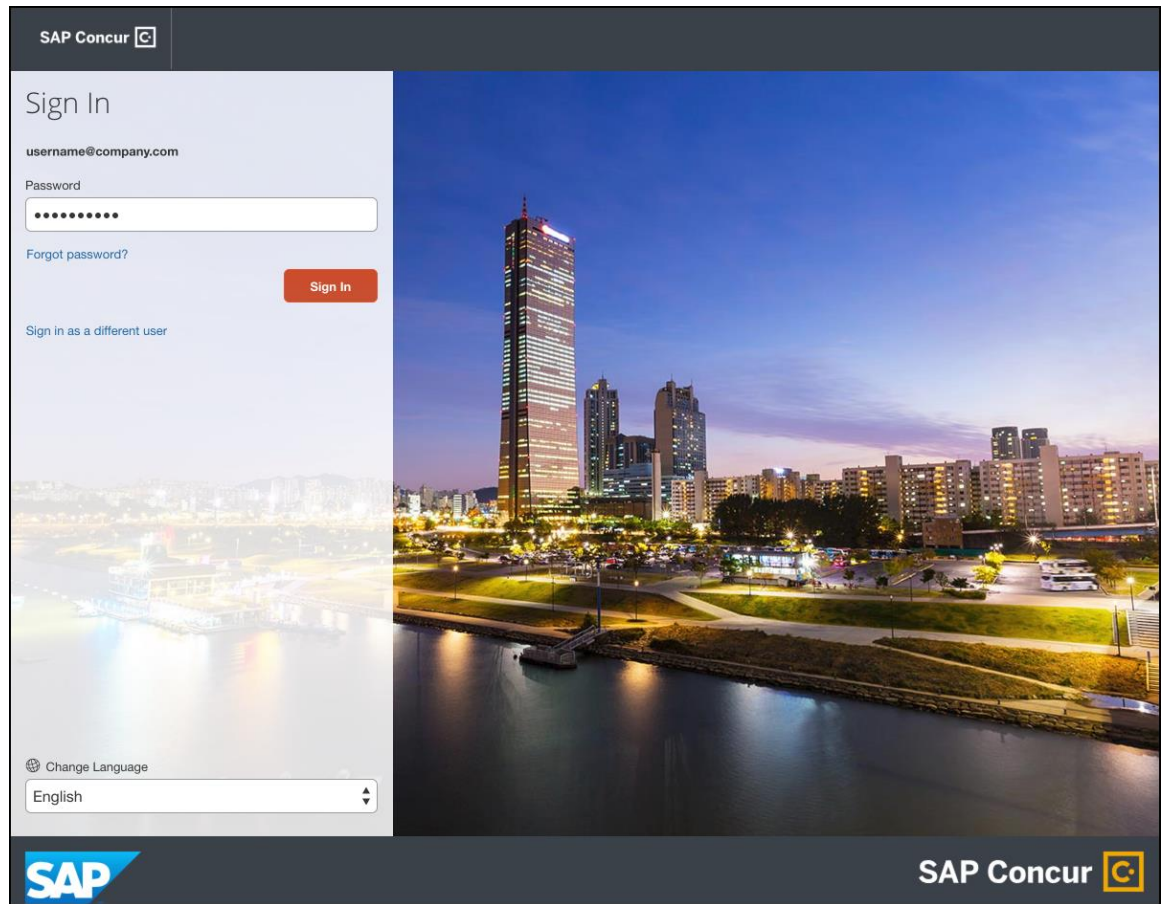


The screenshot shows the SAP Concur 'Single Sign On' Portal. At the top is the SAP Concur logo. Below it, the title 'SAP Concur "Single Sign On" Portal' is centered. There are two input fields: the first for a username/email (containing 'username@company.com') and the second for a password (masked with dots). Both fields have a question mark icon to the right. Below the fields is a large blue 'Sign In' button. At the bottom, there is a link that says 'Need help signing in?'.

After being authenticated, the user will be directed to the SAP Concur **Home** page.

USERS WITH USERNAMES AND PASSWORDS

The user will be directed to an additional **Sign In** page. The user will enter a password and click **Sign In**. The system will then authenticate the user's credentials.



SAP Concur

Sign In

username@company.com

Password

.....

[Forgot password?](#)

[Sign In](#)

[Sign in as a different user](#)

Change Language

English

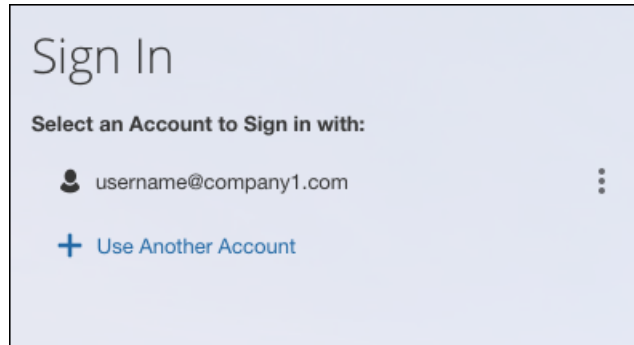
SAP

SAP Concur

Once the user's password is verified, the SAP Concur **Home** page appears.

RETURN USERS

If a returning user selected the **Remember me on this computer** check box during their initial login session, they will see their email or user name display on the **Sign In** page. Users who did not select the **Remember me on this computer** check box will log in as they did initially.



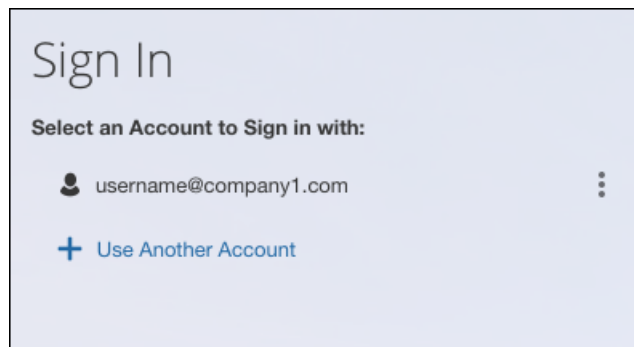
The user will click on their email or username, and then one of the following occurs:

- **SSO Users:** The user will be directed to the SAP Concur **Home** page.
- **Users with Usernames and Passwords:** On the **Sign In** page, the user will enter as password and then click **Sign In**. The user will then be directed to the SAP Concur **Home** page.

USERS WITH MULTIPLE ACCOUNTS

SAP Concur users with multiple login accounts have more than one login option depending on the user role or account they want to use. The user will first log in to SAP Concur using one of their accounts. Once successfully logged in, the user logs out of the system.

To add another account, on the **Sign In** page, the user clicks the **Use Another Account** link.

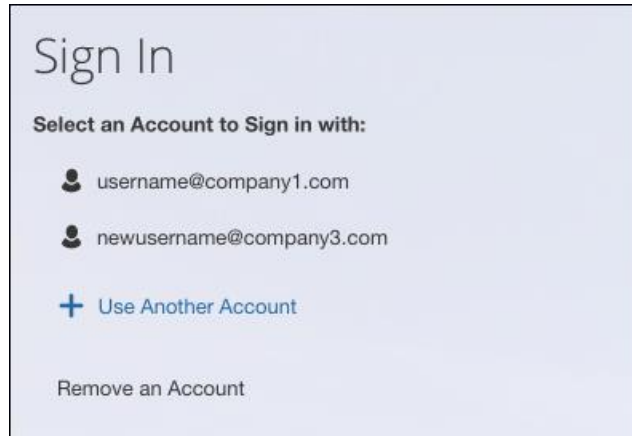


The next login step depends on the account type the user wishes to use:

- **SSO Account:** If the user selects an account with SSO credentials, the user will enter an email, then the user will be directed to the IdP Single Sign-On portal. Once the user is authenticated, the SAP Concur **Home** page appears.

- **Username and Password:** The user is directed to an additional **Sign In** page to enter a password. The user then clicks **Sign In**. Once the user is authenticated, the SAP Concur **Home** page appears.

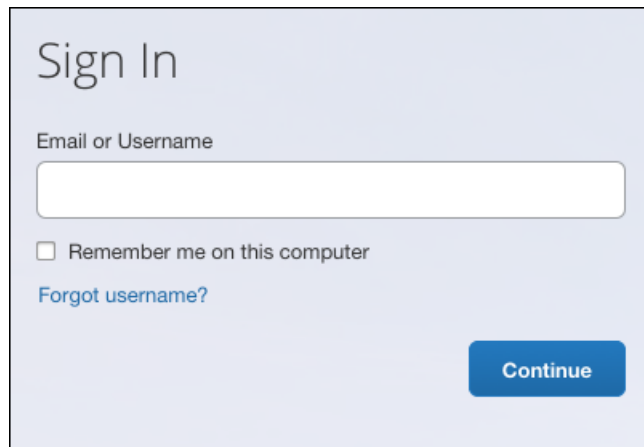
When all accounts are added, a return user will select the account they want to use to log in to SAP Concur.



The screenshot shows a 'Sign In' page with a light blue background. At the top, the text 'Sign In' is displayed. Below it, the instruction 'Select an Account to Sign in with:' is shown. There are two account entries, each with a person icon and an email address: 'username@company1.com' and 'newusername@company3.com'. Below these is a blue plus icon followed by the text 'Use Another Account'. At the bottom, there is a link that says 'Remove an Account'.

FORGOT USER NAME

If a user forgets their user name, the user will click the **Forgot username?** link on the **Sign In** page.



The screenshot shows a 'Sign In' page with a light blue background. At the top, the text 'Sign In' is displayed. Below it is a label 'Email or Username' above a white input field. Under the input field is a checkbox labeled 'Remember me on this computer'. Below the checkbox is a blue link that says 'Forgot username?'. At the bottom right, there is a blue button with the text 'Continue'.

Next, the **Forgot User Name** page appears, and the user will enter their email and click **Send** to have an email sent to a verified email account. This email will contain their user name.

SAP Concur

Forgot User Name

Enter the email address associated with your account. We will send an email with your user name.

Email

[Cancel](#) [Send](#)

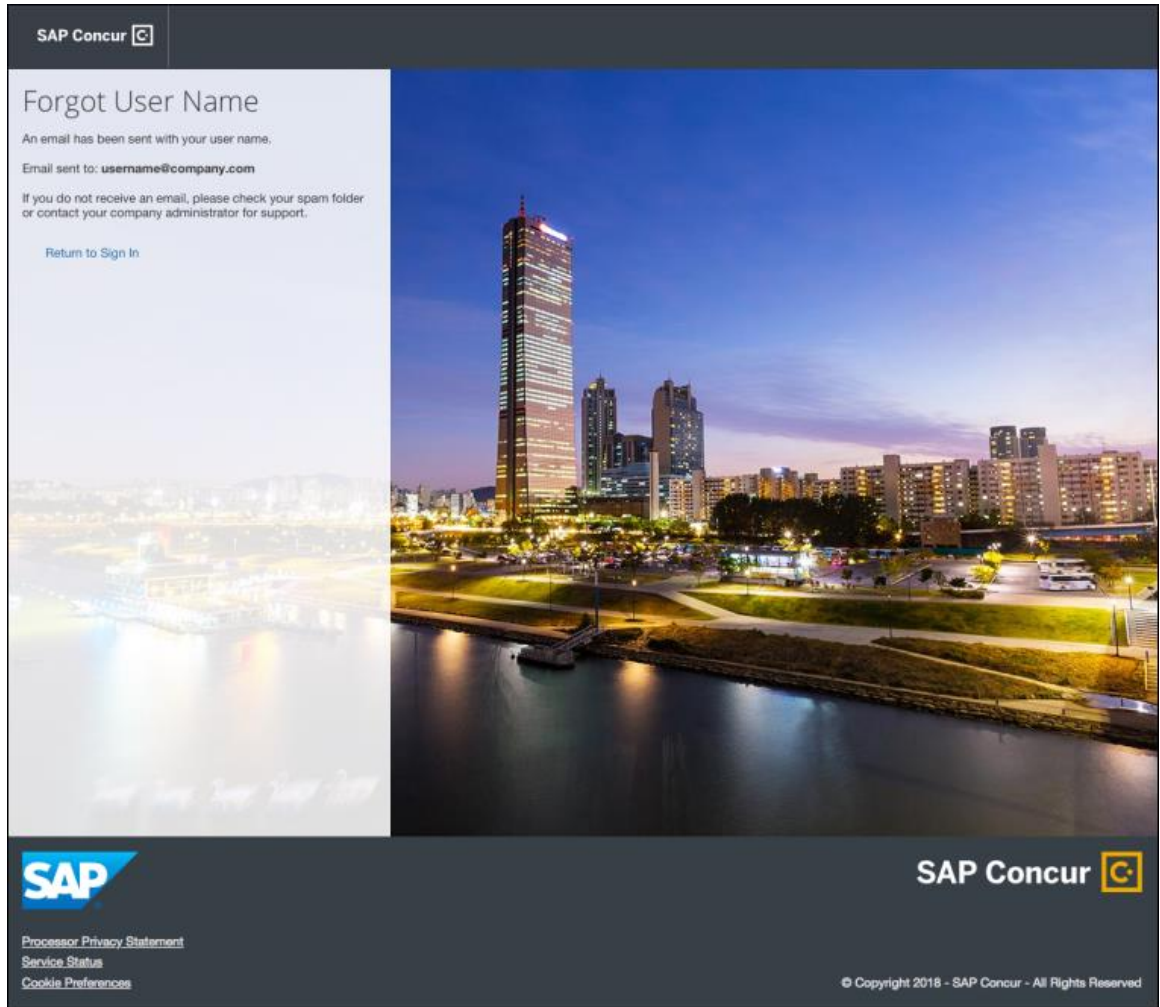
SAP

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[Service Status](#)
[Cookie Preferences](#)

SAP Concur

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The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



INVALID PASSWORD

If a user forgets their password, an on-screen message will appear alerting the user. The user will then click **Send** to have a password reset email sent to their verified email account.

SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

SAP Concur

Forgot Password

Enter the email address or username associated with your account. We will send an email with a link to reset your password.

Email or Username

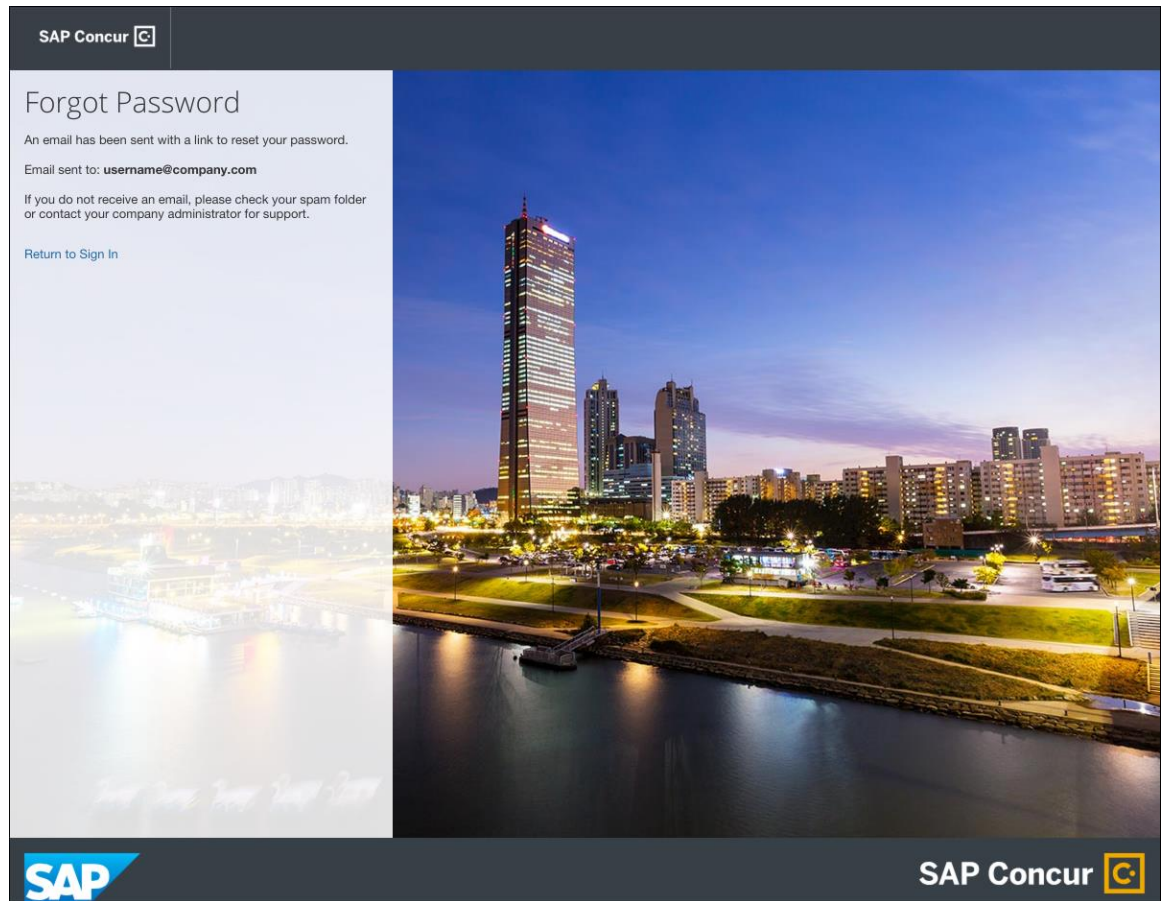
Cancel Send

SAP

Processor Privacy Statement

SAP Concur

The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



Configuration / Feature Activation

Configuration information will be provided in a future release note.

Budget

****Planned Changes** Workflows for Budget**

Overview

In a future release, workflows will be available for Budget. Workflows define how the system routes invoices, expense reports, and requests through approval and processing steps. SAP Concur's flexible workflow feature for Budget allows companies to design workflows specifically tailored to their unique needs.

Without budget review, budgets may become fully consumed well before the end of a period or year leaving an organization with limited options and budget owners with, for example, exceeded budgets. In addition, early spending means that more

important (to the organization) spending will be declined because lesser important spending consumed the budget early on.

Combining budget review in the workflow adds value. Audit rules and workflow step rules can help organizations to add in controls when it makes sense to fine tune to an organization's specific needs.

Equally important is the determination when a spending item is regarded as committed toward a budget. In most organizations, the commit is when a spending item is paid; it went through most if not all approval steps. In other organizations, the commit occurs much earlier. As soon as a purchase request or an authorization request is approved it is regarded as "promised".

BUSINESS PURPOSE / CLIENT BENEFIT

This feature will provide clients with control over the budget spend to, for example, avoid exceeded budgets too early in a budget period or budget year.

Configuration / Feature Activation

The administrator needs to configure this feature on the **Workflows** page by clicking **Administration > Invoice** or **Expense**.

Budget Insight

****Planned Changes** Budget Insight (Legacy) to Retire in 2019**

Overview

Budget Insight is a budget management tool that is being retired June 30, 2019. Clients who want to use budget functionality are recommended to purchase SAP Concur's new Budget product which released earlier this year. The new Budget feature offers greater functionality, an improved UI, and additional integrations with SAP Concur products. Most notably is the inclusion of additional expense data from Concur Expense, Concur Invoice, Concur Travel and Concur Request (previously only data from Concur Expense and Concur Request were available).

NOTE: Clients should note that migrating from Budget Insight to Budget is not possible. Their current contract for Budget Insight will be terminated and they will be re-contracted on Budget, which requires a new implementation. However, clients will still have access to all Budget Insight functionality and data during re-implementation of Budget. If clients would like to implement the new Budget product, they should contact their SAP Concur account team.

BUSINESS PURPOSE / CLIENT BENEFIT

The retirement of Budget Insight will provide clients with the opportunity to purchase SAP Concur's new Budget product that gives greater value to clients by making budgets visible, actionable, and near real-time.

Configuration / Feature Activation

When Budget Insight retires, clients will no longer be able to report issues and receive support for this product.

Company Administration

****Planned Changes** Single Sign-On (SSO) Self-Service Option Coming to SAP Concur**

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur products which provides SAP Concur clients with a self-service option for setting up SSO for their organization. SSO is currently supported for Concur Expense, Invoice, Request, and Travel.

Other SAP Concur products and services are outside the scope of this initial release.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Administration > Company > Company Admin** page.

NOTE: This new feature does not affect Travel clients who are already using the Security Keys feature.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides SAP Concur clients with a self-service option for setting up SSO.

Configuration / Feature Activation

Configuration information will be coming in a future release note.

E-Bunsho

****Planned Changes** Updated Timestamp Icon**

Overview

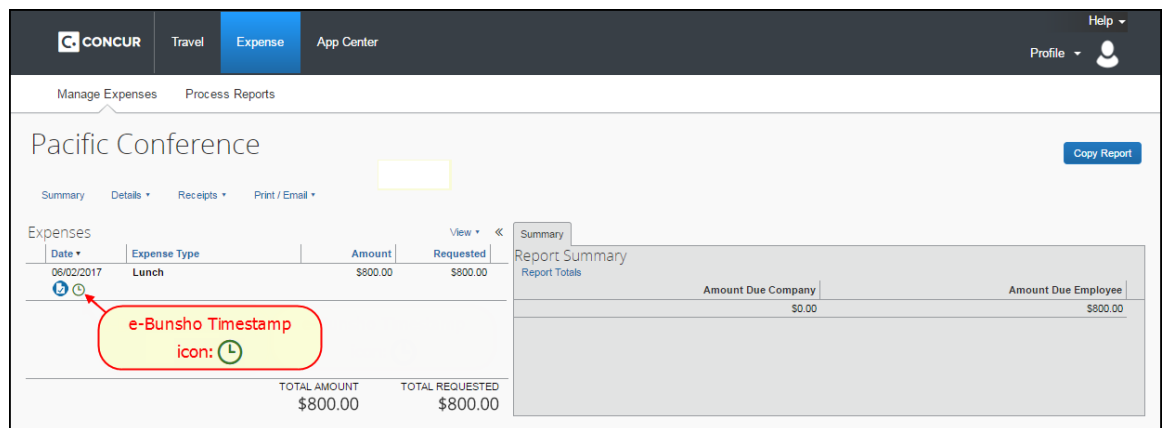
The e-Bunsho feature's timestamp icon will be updated from an analog clock symbol to a check mark symbol.

BUSINESS PURPOSE / CLIENT BENEFIT

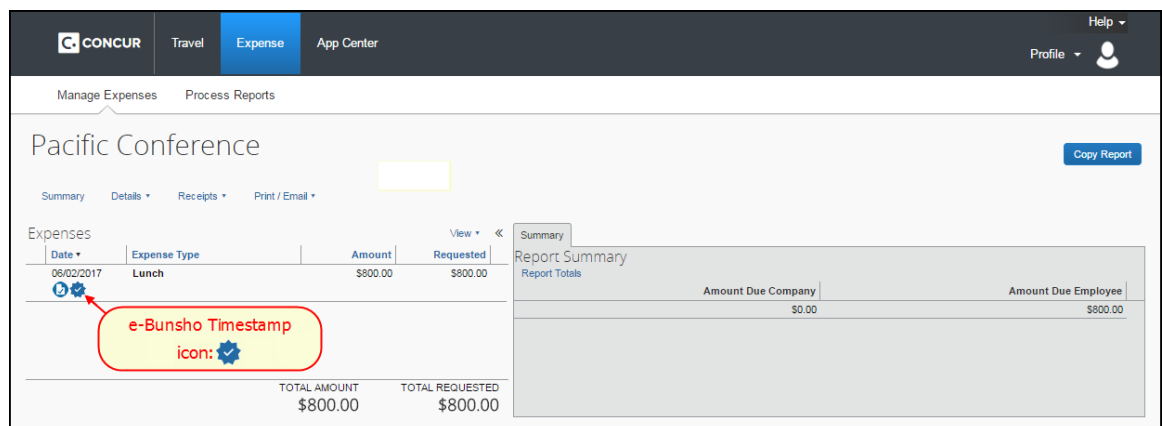
This change improves feature usability.

What the User Sees

The current analog clock symbol displays on Expense reports that have an attached e-Bunsho receipt.



The updated icon will replace the existing icon and display in the same place on the Expense report.



Configuration / Feature Activation

The update will be automatically available; there will be no additional configuration or activation steps.



For general information about this feature, refer to the *Expense: Receipt Handling – Uploaded and Emailed Images Setup Guide*.

Expense Pay – Global

****Planned Changes** (USD) New Payment Processing Partner: WUBS**

Overview

Public sector clients will be able to use Western Union Business Solutions (WUBS) to process their United States Dollar (USD) payments.

The Expense Pay – Global product functions the same way regardless of which payment-processing partner your funding account is configured to use. What is different about WUBS compared to Bambora (or classic Expense Pay) is how your funding accounts are setup in Concur Expense. Each payment-processing partner has unique forms that must be completed, submitted, and approved as part of the onboarding process.

NOTE: Company cards supported for payment-processing partners are not partner-specific.

BUSINESS PURPOSE / CLIENT BENEFIT

This additional payment-processing partner increases the value of our Expense Pay – Global offering.

What the Admin Sees

When enabled, you may create a new WUBS global funding account. The user interface will display an imbedded WUBS onboarding application form. Western Union retains control over the design and maintenance of the onboarding application form.

EXAMPLE

Funding Account





Western Union Business Solutions Registration

 Navigation and Status

Business Information

* or ** indicates a mandatory field

Information About You

I wish to submit an application for a:*

Choose One...

First Name:*

Middle Name:

Please provide if applicable.

Last Name:*

Date of Birth:*



Your Residential Address:*

City:*

Residential Address Country:*

United States of America

State / Province:*

Choose One...

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Initial Post: Friday, December 7, 10:00 AM PT

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Expense Professional / Premium
Client FINAL

Zip Code:*

Telephone:*

Email Address:*

Business Name:*

Business Occupation:

Website Address:

This is the website address for your business.

– Business Address

City:*

Business Address Country:*

United States of America ▼

State / Province:

Choose One... ▼

Zip Code:*

PREVIEW

SAVE/SUBMIT

NEXT

Cancel

What the User Sees

Users will see no difference in Profile. The **Bank Information** page in Profile is the same for Bambora and WUBS.

Configuration / Feature Activation

To request this feature, contact Concur Client Support.

Security

****Planned Changes** Update to File Transfer Authentication**

Overview

SAP Concur is planning to update an authentication setting for clients who transfer files to/from SAP Concur. The updated setting will lock out user accounts after five failed authentication attempts. Some accounts are already using this setting, and this change will update all accounts to this setting. This authentication change does not impact the main SAP Concur application login, only the file transfer process.

Clients who have locked themselves out of their accounts should contact SAP Concur Client Support to unlock their accounts.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security for clients when accessing extract and import files.

Configuration / Feature Activation

This feature will be implemented automatically in a future release.

Test User Admin

****Planned Changes** Retiring the Purge Test User Transactions Functionality**

Overview

SAP Concur is retiring the functionality in the Test User Admin feature that removes the transactions of test users from Concur Expense, Concur Invoice, Concur Travel, and Concur Request.

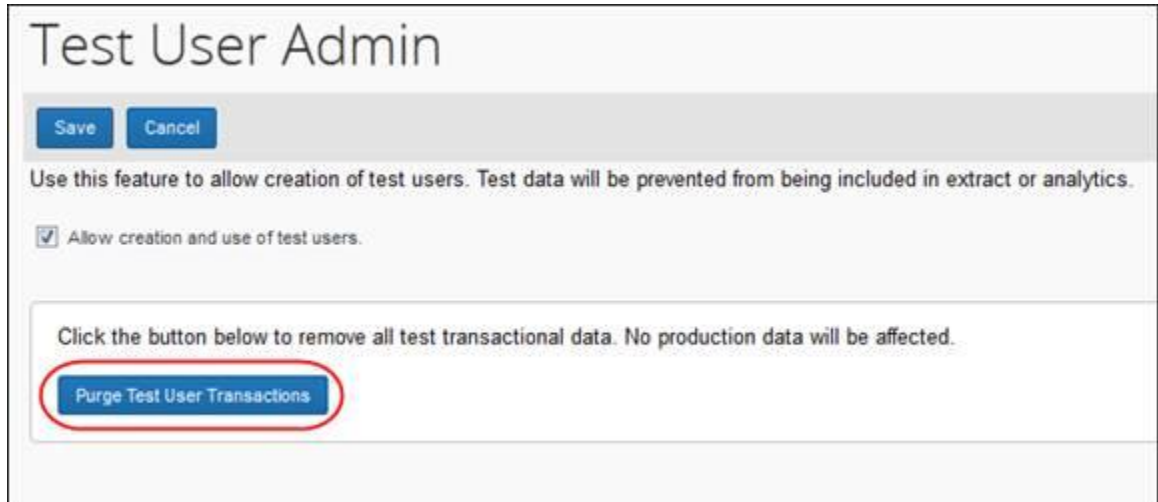
BUSINESS PURPOSE / CLIENT BENEFIT

This change will allow SAP Concur to devote more resources to development and maintenance of features that are used by many or most of our clients.

What the Admin Sees

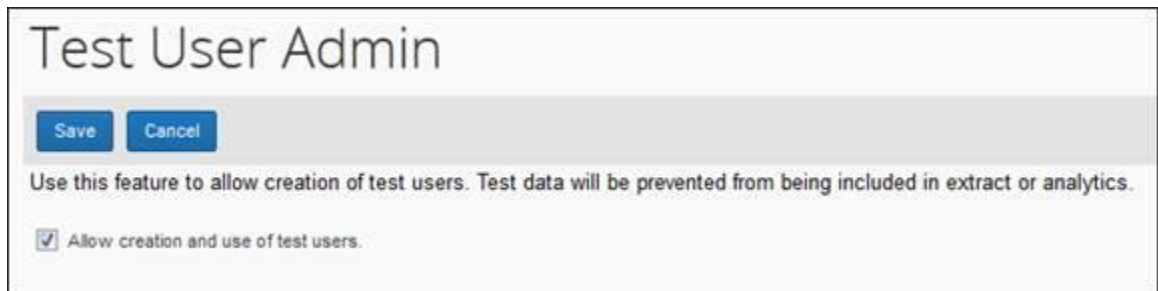
The **Test User Admin** page will no longer display the **Purge Test User Transactions** button.

BEFORE



NOTE: To access the page, click **Administration > Expense** (or **Invoice or Requests**) > **Test User Admin**.

AFTER



Configuration / Feature Activation

The functionality will automatically be removed.



For general information about the Test User Admin feature, refer to the *Shared: Test User Setup Guide*.

Training Administration

****Planned Changes** Optimizing and Relocating the Page**

Overview

To simplify the **Training Administration** page, the page will no longer have tabs, only the current contents of the **Alternate URL** tab will remain.

In addition to this change, access to the **Training Administration** page will move from **Company Admin** to **Tools**.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes make the page easier to find and use.

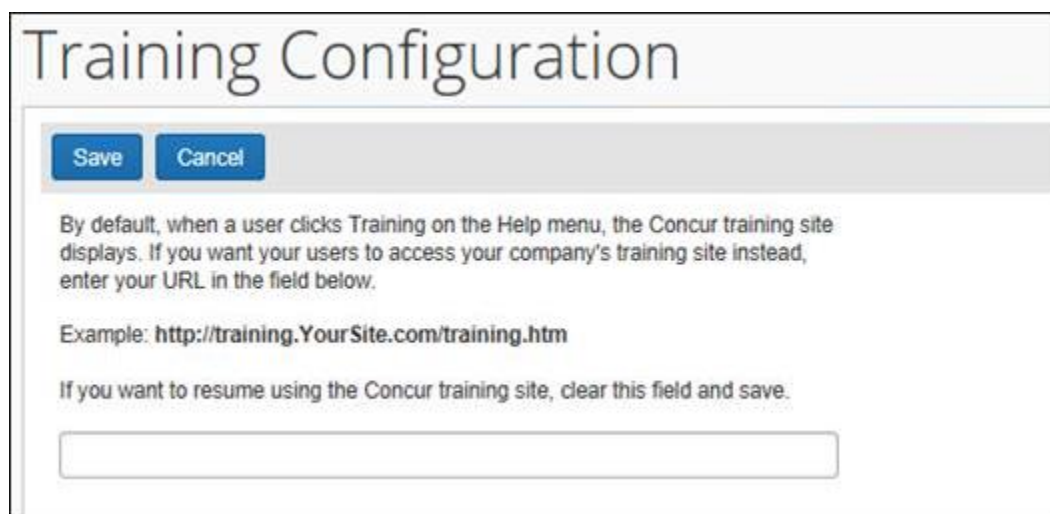
What the Admin Sees

The **Training Configuration** page displays only a field for providing your users with an alternate Training URL.

BEFORE

Display Order	Type	Name
↓	Simulation	Logging on to Concur
↓ ↑	Simulation	Updating Your Travel Profile
↓ ↑	Simulation	Exploring the Concur Home Page

NOTE: To access the page before this change, click **Administration > Expense (or Invoice or Requests) > Training Administration**.

AFTER

The screenshot shows a 'Training Configuration' dialog box. At the top, there are 'Save' and 'Cancel' buttons. Below them is a text area with the following text: 'By default, when a user clicks Training on the Help menu, the Concur training site displays. If you want your users to access your company's training site instead, enter your URL in the field below.' An example URL is provided: 'Example: http://training.YourSite.com/training.htm'. Below the example, it says 'If you want to resume using the Concur training site, clear this field and save.' At the bottom is a text input field.

NOTE: To access the page after this change, click **Administration > Company > Tools > Training Administration**.

Configuration / Feature Activation

The change will be automatically available; there are no additional configuration or activation steps.



For general information about the Training Administration feature, refer to the *Shared: Training Administration Setup Guide*.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.



For information about accessing all release notes, browser certifications, setup guides, user guides, other technical documentation, and supported configurations, refer to the *Additional Release Notes and Other Technical Documentation* section in this document.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: [SAP Concur list of Subprocessors](#)

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Additional Release Notes and Other Technical Documentation

Online Help – Admins

Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.

The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with 'SAP Concur' logo and various menu items: Requests, Travel, Expense, Invoice, Approvals, Reporting, App Center, and Links. A 'Help' dropdown menu is open, showing options: Training, Expense Help, and Expense Administration Help. The 'Expense Administration Help' option is circled in red. Below the navigation bar, there is a 'TRIP SEARCH' and 'MY TASKS' section. The main content area is titled 'Using Online Help' and contains a list of links: 'Using Online Help', 'Legal Notice', 'Resources for Administrators - Professional Edition', 'Expense Professional Administration Guides' (circled in red), and 'Budget Insight (Legacy) Administration Guide'. Below this, there is a 'Quick Links - Concur Professional/Premium' section with links to 'Client Admin Release Summary - What's New', 'Client Release Notes - All Products', 'Client Fact Sheets', 'Concur Training Toolkit', and 'Icons in the UI - NEW'. To the right of these links, there is a section titled 'Expense Setup Guides' with a table of guides.

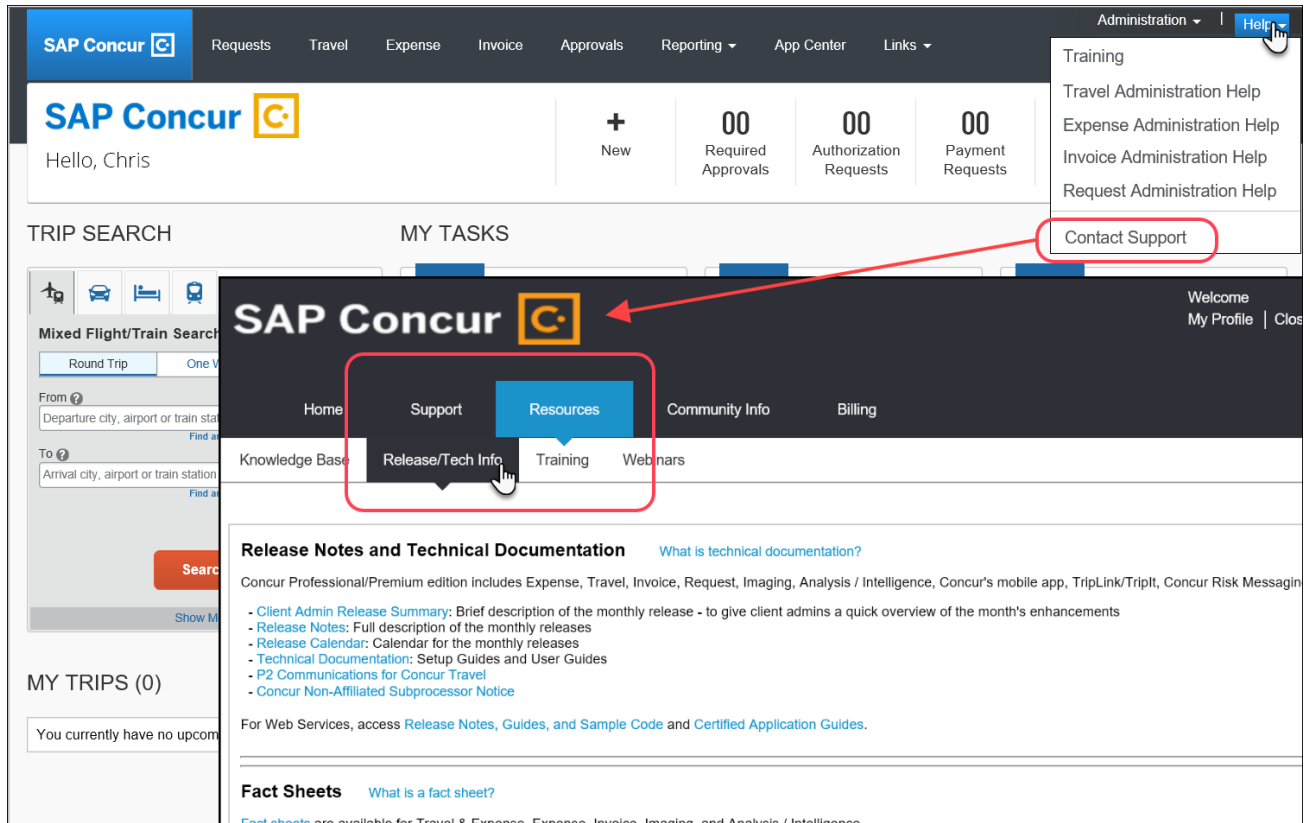
Name	Revised	Format
Account Codes	Jan 10 2017	DOC - PDF
Allocations	Sep 20 2013	DOC - PDF
Attendees	Mar 6 2017	DOC - PDF

SAP Concur Support Portal – Selected Users

Selected users within the company can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via the SAP Concur support portal.

Additional Release Notes and Other Technical Documentation: SAP Concur Support Portal – Selected Users

If a user has the proper SAP Concur support portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the support page, the user clicks **Resources > Release/Tech Info**.



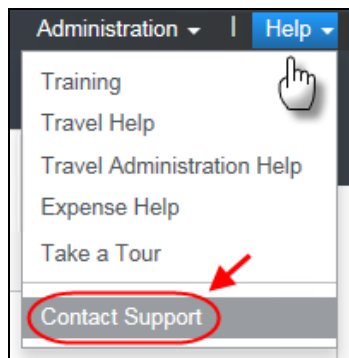
Cases

Steps for Getting a Status

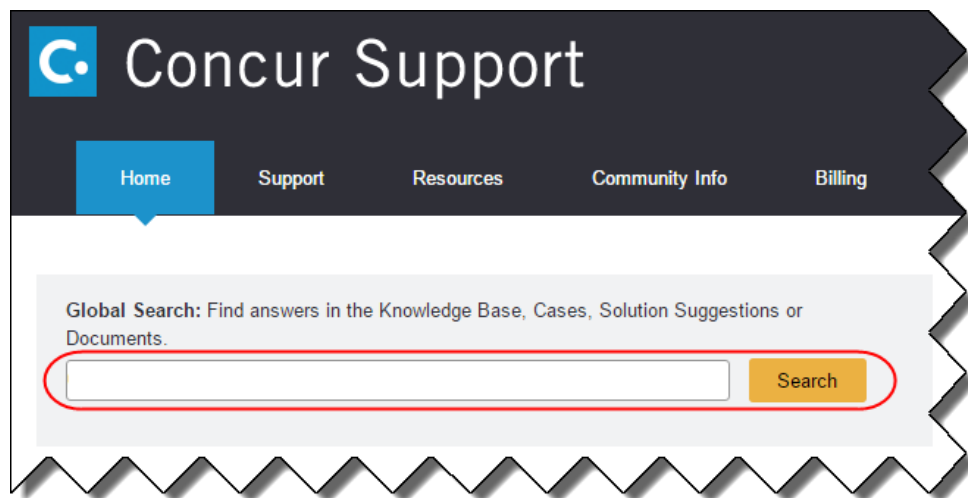
Each service release contains case resolutions.

► **How to check the status of a submitted case**

1. Log on to <https://concursolutions.com/portal.asp>.
1. Click **Help** > **Contact Support**.



The **Concur Support** page displays.



NOTE: If you do not have the option to contact Support under the Help menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

2. Enter your **Case ID**.
3. Click **Search**. Search results are limited to each company's own cases.

Example

This release's (case) fixes include, *but are not limited to*, the following:

Case ID	Description
11673115	Smart Expenses Attendees were removed when a match between a manual entry and smart expense was accepted. <i>The code has been updated and this issue is no longer reproducible.</i>

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