

SAP Concur Release Notes Concur Expense Professional / Premium	
Month	Audience
Release Date: January 20, 2024 Initial Post: January 19, 2024	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

This document contains the release notes for Concur Expense professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Expense

Expense Payment Confirmation Import Now Supports Report Number

Overview

Previously, Expense Payment Confirmation Import utilized Report ID or Report Key as the expense report identifier to import an expense payment confirmation. Now, Report Number is included as an additional expense identifier for an expense report.

For example, in a file with 100 records, the third column was KEY or ID. Now, the third column supports another value NUMBER:

- If the third column is NUMBER, the system reads the Reserved1 field for a report number. Reserved1 field is now used for this purpose as NUMBER. If the report number is not available, then the system throws a validation error. Report ID field automatically becomes an optional field when NUMBER is used.
- If the third column is KEY or ID, but the client enters the report number in the Reserved1NUMBER field, then the system uses the report number as precedence to search for a report.
- If the third column is KEY or ID, but the Reserved1NUMBER field is not populated, then the system uses the existing value of report ID or KEY to search for a report.

BUSINESS PURPOSE

This update helps maintain consistency with other expense extracts and imports and when client integrations only have report number in place of Report Key or Report ID.

Administrator Experience

Use the Report Number as an expense identifier in the Reserved1/NUMBER field to import expense payment confirmations.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Expense Pay

Additional Card Program Now Supported for Europe

Overview

Expense Payment Manager now supports the following HSBC credit card programs issued out of Europe:

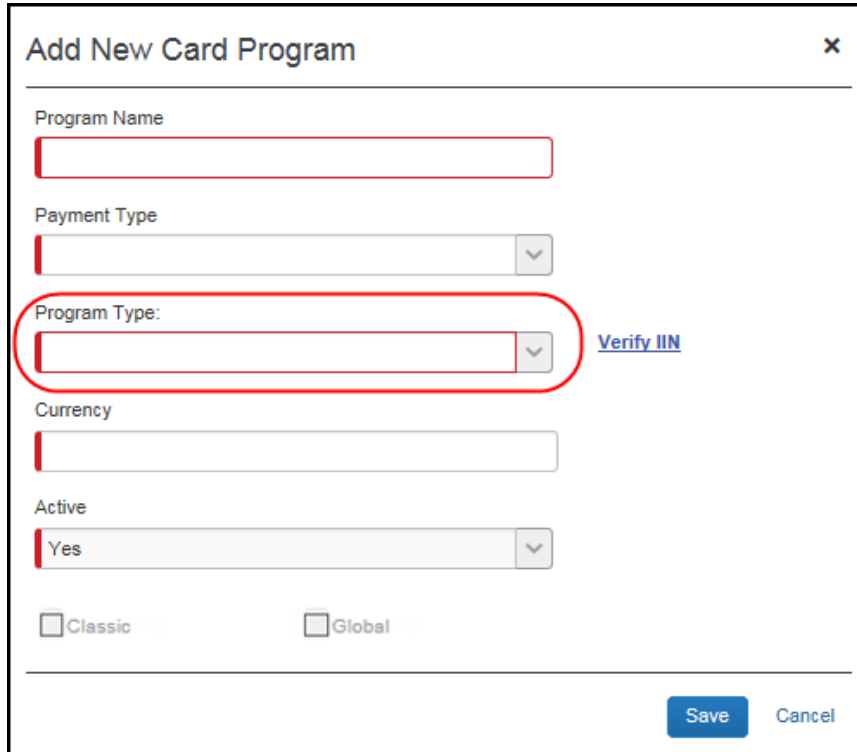
- HSBC – VISA – GBP – HBEU
- HSBC – MasterCard – EURO – HBEU
- HSBC – MasterCard – GBP – HBCE
- HSBC – MasterCard – EURO – HBCE

BUSINESS PURPOSE / CLIENT BENEFIT

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

Administrator Experience

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



Add New Card Program [X]

Program Name
[Text Field]

Payment Type
[Dropdown]

Program Type:
[Dropdown] [Verify IIN](#)

Currency
[Text Field]

Active
[Dropdown: Yes]

☐ Classic ☐ Global

[Save] [Cancel]

NOTE: The HBEU cards are issued out of the United Kingdom, while the HBCE cards added are issued out of Continental Europe. Check your issued HSBC card numbers with the Bin ranges allowed for it using the **Verify IIN** link. This ensures you are selecting the correct HSBC card program type.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Receipts – ExpenseIt for Web

ExpenseIt for Concursolutions.com

Overview

Concur brings the power of ExpenseIt to concursolutions.com. Using ExpenseIt to automatically scan and create an expense from an uploaded receipt can save users time and significantly reduce the risk of report rejections or send backs.

Previously, only available on Concur Mobile, users for companies who have purchased ExpenseIt will now be able to upload receipts through familiar steps in Expense to automatically create expense entries for a report. To do this, ExpenseIt extracts key data from the receipt to automatically fill in expense details, while still giving users the flexibility to edit any values that require changes.

BUSINESS PURPOSE / CLIENT BENEFIT

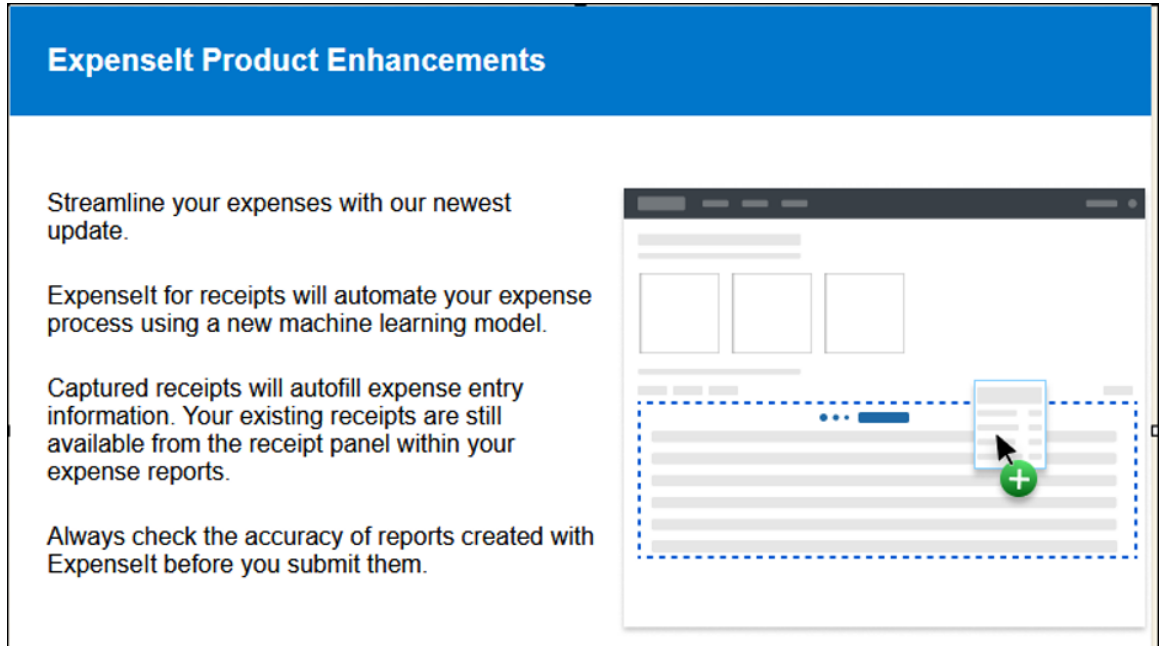
This reduces data entry effort for the end-user and provides the company with expanded awareness and benefit from ExpenseIt.

Release Schedule

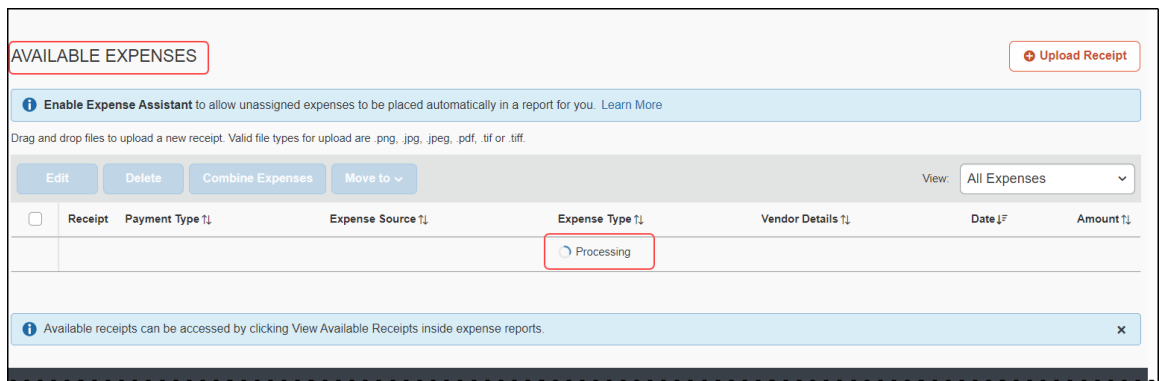
ExpenseIt for Web is released to all customers the week of January 15, 2024. Individual customers were activated over the course of this week, so not all customers were enabled on the same day.

End-User Experience

This feature will alert the ExpenseIt end-user that new functionality is available by displaying the **ExpenseIt Product Enhancements** informational window when the end-user first logs in.



For end-users with ExpenseIt, all receipts uploaded from the **Manage Expenses** page on Concur.com or emailed to receipts@concur.com automatically appear for viewing on the **Available Expenses** section of the page.



End-users can drag-n-drop receipts or use the **Upload Receipt** button to add one or more receipts at the same time, all processed by ExpenseIt. A blue bar appears under the expense table with information explaining the user interface – after review, dismiss by clicking the X to the right.

 Available receipts can be accessed by clicking View Available Receipts inside expense reports. 

NOTE: Receipts uploaded via the web UI or emailed may not be eligible for digital certification per the country-specific regulatory requirements that apply for that user. These users should continue to use the same processes they employed prior to this feature to achieve a certified receipt image.

Once processed, a new expense is created for the end-user with the following fields pre-populated from data extracted or predicted from the receipt image:

Fields Pre-Populated by ExpenseIt's Data Extraction Functionality			
Amount	Currency	Date	Expense Type
Location	Payment Type	Vendor	

AVAILABLE EXPENSES

Upload Receipt

 Enable Expense Assistant and these expenses will be placed in a report for you. [Learn More](#)

Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

Edit Delete Combine Expenses Move to ▾

View: All Expenses ▾

☐	Receipt	Payment Type ⌵	Expense Source ⌵	Expense Type ⌵	Vendor Details ⌵	Date ⌵	Amount ⌵
☐		Cash	ExpenseIt	Parking	Key Center Bellevue	10/17/2023	\$24.00

To find missing transactions: Card Transactions

 Available receipts can be accessed by clicking View Available Receipts inside expense reports. ×

If required, the end-user can edit the ExpenseIt results by selecting the ExpenseIt item from the **Available Expenses** list. Once selected, choose **Edit** to open the expense, make any necessary changes, and then save them.

The screenshot shows the SAP ExpenseIt interface. On the left, the 'AVAILABLE EXPENSES' section is highlighted with a red box. It includes a table with columns for Expense Source, Vendor, Date, and Amount. The table contains one entry: Expense Source: ExpenseIt, Vendor: Key Center, Date: 10/17/2023, Amount: \$24.00. Below the table, there are buttons for 'Edit', 'Delete', and 'Combine Expenses'. There is also a section for 'Receipt' and 'Payment Type'. On the right, the 'Expense Source' form is open, showing the details of the selected expense. The form includes fields for Expense Type (Parking), Vendor (Key Center), Location (Bellevue), Date (10/17/2023), Amount (\$24.00), and Currency (US Dollar). A receipt image is also displayed within the form, showing a parking receipt from Key Center for \$24.00. The receipt includes details such as 'Short-term parking tkt', '1 - No. 031880', '10/17/23 10:46', '10/17/23 16:13', 'Period 0d5h28', and 'Total \$24.00'. The receipt is signed 'APPROVED'.

ADDITIONAL CHANGES TO THE USER INTERFACE

ExpenseIt end-users should note that the **Available Receipts** section is no longer available in the **Manage Expenses** page. Now, all receipt images (including receipts created prior to this feature) are available and may be attached to expenses from within the expense report. To do this, open the report, select the target expense, click **Add Receipt**, and add a receipt from the new location for **Available Receipts**. Users can also use this method to add new images to an expense without processing by ExpenseIt.

HANDLING OF NON-RECEIPT DOCUMENTS FOR THE EXPENSE REPORT

Documents to support the expense, such as approval emails, travel itineraries, registration confirmations, or other supporting documents are *not* emailed or uploaded through the **Manage Expense** page. Instead, end-users will manually attach those supporting documents to an expense or the expense report.

IMPORTANT: THE VERIFICATION STEP

ExpenseIt saves time and reduces manual entry errors by extracting information from a receipt image to create and display an expense; however, the technology is not always 100% accurate. Users should always scan and verify ExpenseIt results using the edit function for needed corrections.

NOTE: Deleting the item and re-uploading the same image will not produce different results. Users should instead edit the available expense to correct the information.

DOCUMENT CERTIFICATION/TAX COMPLIANCE

Options for providing tax compliant receipt documents are dictated by the country-specific regulatory rules, and users must continue to follow the same processes used prior to this change.

- **Receipt Digitalization:** Images uploaded on Concur Solutions.com or emailed, whether processed by ExpenseIt or as an image only, are *not* eligible for image certification. Users must continue to utilize Concur Mobile to create compliant images.
- **eBunsho Timestamp:** For eligible users, images uploaded on Concur Solutions.com and processed through ExpenseIt will be sent through the eBunsho timestamping process. The functionality will continue to support emailed receipts and image capture via Concur Mobile.

DISABLING EXPENSEIT

The end-user may disable the use of ExpenseIt for the Web and remove the end-user interface and functionality described in this release note by clearing the **Use ExpenseIt to create expenses from uploaded receipts and receipts emailed to receipts@concur.com** on **Profile Settings > Expense Preferences**.

NOTE: This Expense Preference only affects ExpenseIt for the Web and receipts that are emailed to SAP Concur. Disabling this user preference will NOT disable ExpenseIt within the Concur Mobile app.

The screenshot shows the SAP Concur web interface. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The left sidebar contains a 'Profile' dropdown and a list of settings categories: Personal Information, Change Password, System Settings, Concur Mobile Registration, and Travel Vacation Reassignment. Under 'System Settings', there are sub-sections for Your Information, Travel Settings, Request Settings, and Expense Settings. The 'Expense Settings' section is expanded, showing 'Expense Information', 'Expense Delegates', 'Expense Preferences' (highlighted with a red box), 'Expense Approvers', 'Company Car', and 'Favorite Attendees'. The main content area is titled 'Expense Preferences' (also highlighted with a red box). It contains a 'Save' and 'Cancel' button, a description of email notification prompts, and several checkboxes for sending emails. The checkbox 'Use ExpenseIt to create expenses from uploaded receipts and receipts emailed to receipts@concur.com' is checked and highlighted with a red box. A red arrow points from this checkbox to the 'Expense Preferences' section in the sidebar. Other checkboxes include 'The status of a cash advance changes', 'A cash advance is submitted for approval', 'The status of an expense report changes', 'New company card', 'Faxed receipts are received', 'An expense report is submitted', 'A card feed import is completed', 'For an approver when an expense report is submitted', and 'Make the Single Day Itineraries page my default in the Travel Allowance wizard'.

Configuration / Feature Activation

No end-user action is required: ExpenseIt is automatically enabled the week of January 15, 2024, for all end-users on entities that have purchased ExpenseIt.

Verify

Audit Profile: Enhanced Display for Multiple Auditors and Groups in Configuration

Overview

Since December 6, 2023, the **Verify Audit Profile** screen has been enhanced with some user interface modifications to display the details of multiple auditors and policy groups in a structured and organized manner.

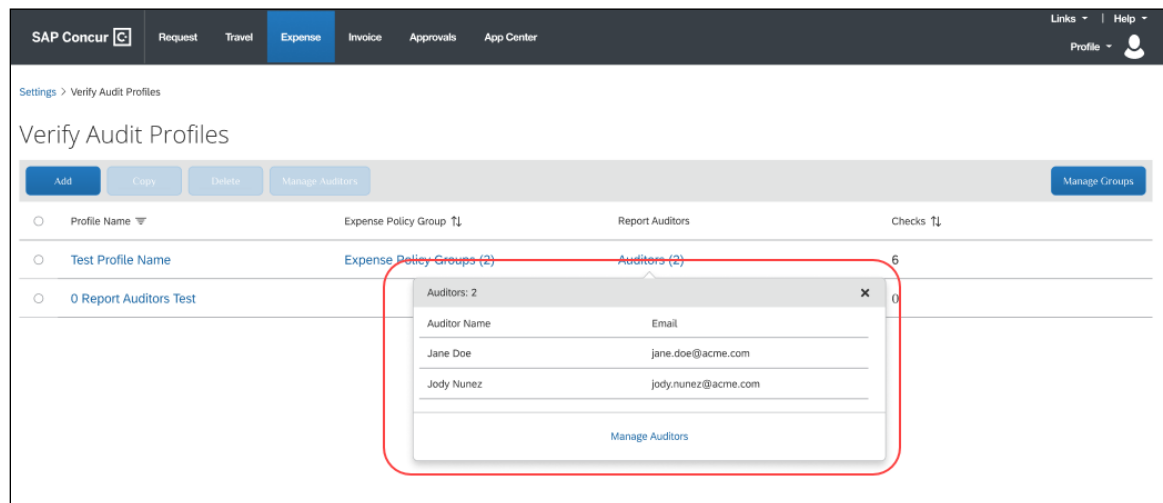
BUSINESS PURPOSE / CLIENT BENEFIT

This feature helps to streamline and improve user experience by presenting diverse auditor and group information in a structured, organized way. This update mitigates information overload, allows easy retrieval of details, and ensures a clutter-free interface. This is beneficial when dealing with multiple auditors and groups.

Administrator Experience

The **Verify Audit Profile** screen is updated to display details of policy groups and auditors in a more structured format.

Example



Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Miscellaneous

Planned Changes New Action Column Available in Expense Screens

Information First Published	Information Last Modified	Feature Target Release Date
January 19, 2024	--	February 20, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for late February 2024, users will use two new action columns indicated by  and , to perform single click actions or multiple actions such as edit, copy, or delete on the Expense screens, such as editing expense, itemizations, allocations, or travel diaries.

The current behavior where the user clicks the Expense rows to trigger an action will no longer be available after late February 2024.

BUSINESS PURPOSE / CLIENT BENEFIT

This update will allow users to execute actions easily and will improve user experience for keyboard and screen reader users.

End-User Experience

All the existing Expense screens where you can perform actions will have new actions columns. This column will always be visible. A dropdown list will display all the actions that you can perform by selecting a single row of data.

A button link will display for single actions. For multiple actions, a **See more** (⋮) button will display with a dropdown list embedded in it.

The screenshot shows the SAP Concur Expense interface. At the top, there's a navigation bar with 'SAP Concur' and 'Expense' tabs. Below it, there are tabs for 'Manage Expenses', 'Card Transactions', and 'Cash Advances'. The main header shows 'Business Meals \$3,436.00' with buttons for 'Delete Report', 'Copy Report', and 'Submit Report'. Below this, there's a 'Report Details' section with buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. A table lists expenses with columns for Alerts, Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, Amount, and Requested. A dropdown menu is open for the first row, showing options: Edit, Delete, Copy, Allocate, Move to, and a right arrow.

Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested	
⚠	💬	📄	Cash	Business Meals (Attendees) Attendees (1)	Seattle, Washington	07.07.2023	\$1,200.00	\$1,200.00	⋮
⚠	💬	📄	Cash	Hotel Attendees	Maritim Hotels Seattle, Washington	07.07.2023	\$2,500.00		⋮
							\$3,436.00		

The updated Expense screens and their actions are:

- Reports list
 - View
- Available Expenses
 - View
 - Delete
 - Move To
- Available Expenses > Add Expense
 - View
 - Add to Report
- Cash Advance
 - Remove
- Request
 - Remove
- Attendees
 - Remove
 - Create Group

- Attendees Favorite Group
 - Add
 - Remove
- Recent Attendees
 - Add
- Attendees Group
 - Add
- Allocations
 - Edit
 - Remove
- Report Entries
 - Edit
 - Delete
 - Copy
 - Allocate
 - Move to
- Report Entries (once the report is submitted)
 - View
- Itemizations List
 - Edit
 - Delete
 - Allocate
 - Copy
- Itemizations List (once the report is submitted)
 - View
- Travel Diary
 - Edit
 - Delete

FOR EXAMPLE

SAP Concur

Expense

Manage Expenses

Card Transactions

Cash Advances

07.07.2023 | Maritim Hotels

Details

Itemizations

Amount

\$2,500.00

Itemized

\$2,236.00

Remaining

\$264.00

Create Itemization

Edit

Delete

Copy

Allocate

	Alerts	Date	Expense Type	Requested	
☐		04.07.2023	Hotel	\$400.00	...
☐		04.07.2023	Hotel Tax	\$12.00	Edit
☐		05.07.2023	Hotel	\$400.00	Delete
☐		05.07.2023	Hotel Tax	\$12.00	Copy
☐		05.07.2023	Business Meals (Attendees)	\$1,000.00	Allocate
☐		06.07.2023	Hotel	\$400.00	...
☐		06.07.2023	Hotel Tax	\$12.00	...

Receipt

Click to upload
Valid file type

SAP Concur

Expense

Attendees

Business Meals (Attendees) | \$1,200.00

Alerts: 3

Amount

\$1,200.00

Attendees: 1

\$1,200.00

Remaining

\$0.00

Add

Remove

Create Group

Copy from Request

	Alerts	Attendee Name	Attendee Title	External ID	Status	Company	Custom 08	Attendee Entry Custom 1	Custom 13	Attendee Entry Custom
☐		NGE, Christian		christian@ng e.com				None Selected		

Remove

Create Group

Cancel Save

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

User Interface Changes

Planned Changes Update to the Report Status Indicator

Information First Published	Information Last Modified	Feature Target Release Date
January, 2024	--	January 30, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

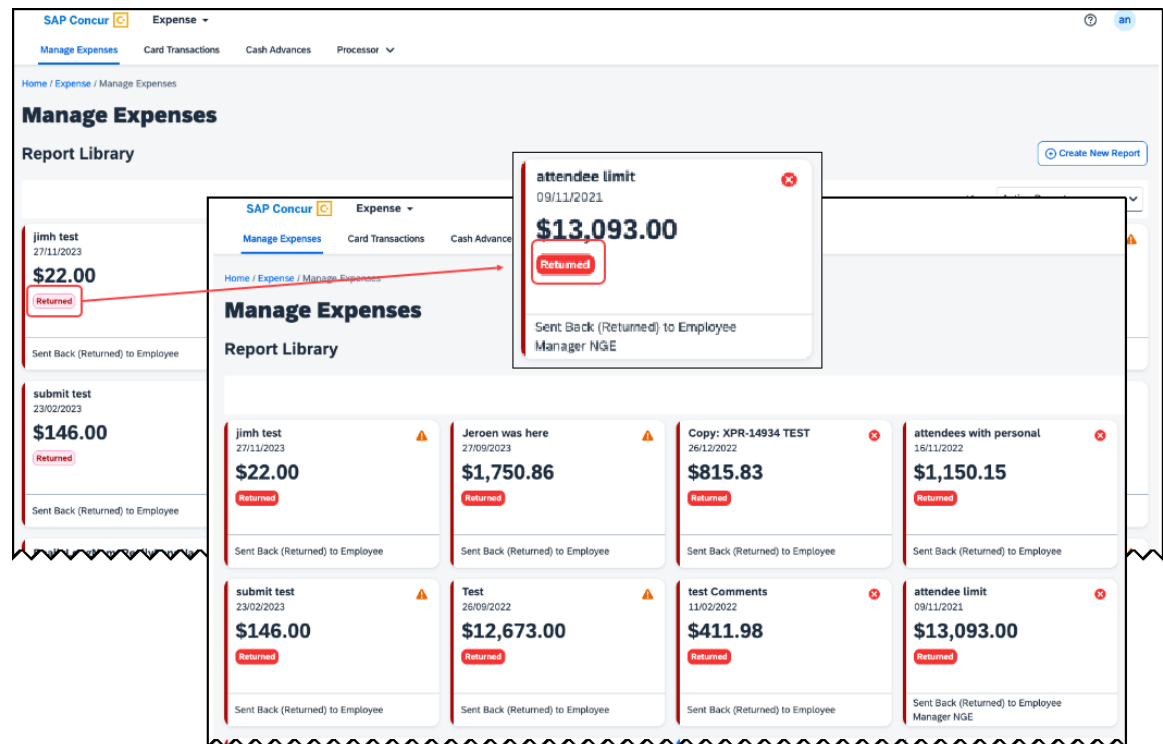
In an upcoming release, the rectangular indicator that shows the status of an expense report will be changed. With the change, this indicator will be more prominent and easier to read than the prior version.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves the user's accessibility to the status information of the expense report by providing greater visibility.

End-User Experience

The end-user will see, in selected screens, a solid color background and white text in the tiles that display the status of the expense report.



Configuration / Feature Activation

These changes will be automatically available after January 30, 2024; there are no configuration or activation steps.

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign into the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign into the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

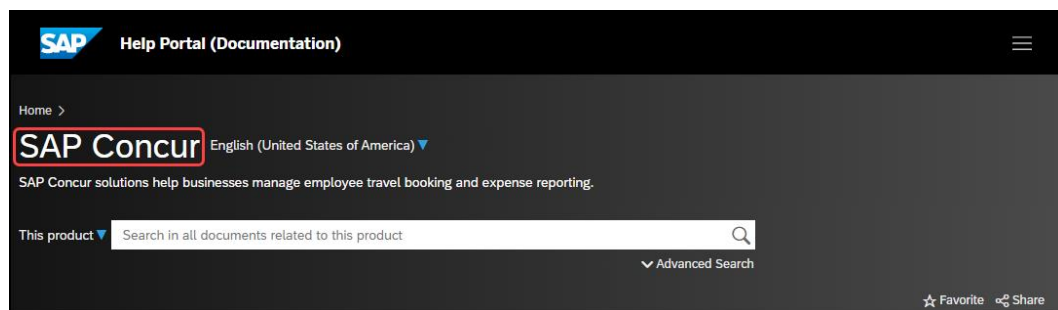
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

► ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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Cards

Retirement of Batch File Option for Unsupported Card Programs

Overview

With this release, any bank card issuers not *currently* supported by SAP Concur will no longer have the option of using the Batch File option. Instead, these issuers will be asked to use the new Payment Card Integration service-based option instead.

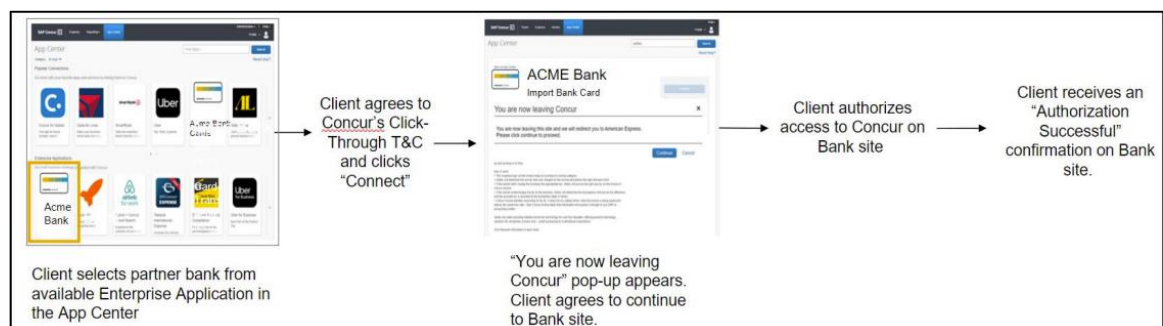
NOTE: This action does not mean a retirement of the Batch File method for card issuers already integrated using the batch file option.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature change directs clients to a superior solution for their upcoming card program integrations by retiring the older method of batch file jobs.

THE PAYMENT CARD INTEGRATION SERVICE

The Payment Card Integration service was released in September of 2023. This API-based service lets clients working with participating financial institutions use the SAP Concur App Center to link their corporate and business card types directly to the Concur Expense product's Card functionality.



This means any card issuer a client would like to use that is not currently integrated with SAP Concur (or does not provide data via the major card associations) will need to use the service-based method instead.

Administrator Experience

Clients working with a bank not yet integrated with the Payment Card Integration service will need to work together with their bank and account manager to determine if integration via Payment Card Integration service is possible.

Configuration / Feature Activation

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



For more information, refer to the section *Cards – Announcing the Payment Card Integration Service* in the *September 2023 SAP Concur Release Notes*.

Yodlee Reauthentication Refresh Frequency

Overview

This release note provides information to users of Yodlee on the need to periodically reauthorize the cards that are connected to SAP Concur via Yodlee to avoid interruptions to their personal card transactions flow.

BUSINESS PURPOSE

By sharing this information, customers can better anticipate when they will need to reauthorize their cards, improving overall experience and reducing potential disruptions.

End-User Experience

There are no changes to the user interface, but you may experience an interruption in the personal card transactions flow if you fail to reauthorize the cards within the required period. Contact your administrator for information on the banks and their respective reauthorization timelines.

Administrator Experience

For more information on banks and their reauthorization timelines, see [Open Banking Token Expiry Dates](#).

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Expense Types

Recovering And Displaying Deactivated Expense Types

Overview

As of February 24th, 2024, Concur Expense allows you to retain an unused expense type by simply deactivating it instead of deleting it. The status of an expense type is now displayed. The status **Yes** and **No** indicates the expense type is active or inactive, respectively.

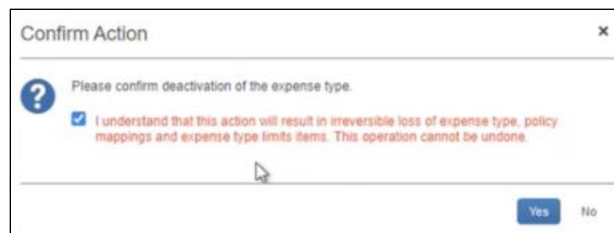
The expense types listing is sorted based on their active status. Much like active expense types, inactive expense types can be modified and can be set to active, or even be reactivated with a different name.

BUSINESS PURPOSE

This update facilitates the administrator in the recovery of a deleted expense type and reconfiguration of the same if required.

Administrator Experience

In the **Expense Admin > Expense Types** screen, the **Remove** button is now replaced with the **Activate** or **Deactivate** button (based on the activation context of the expense type). To activate or deactivate an expense type, select the expense type, and click **Activate** or **Deactivate**. A confirmation dialog pops up.

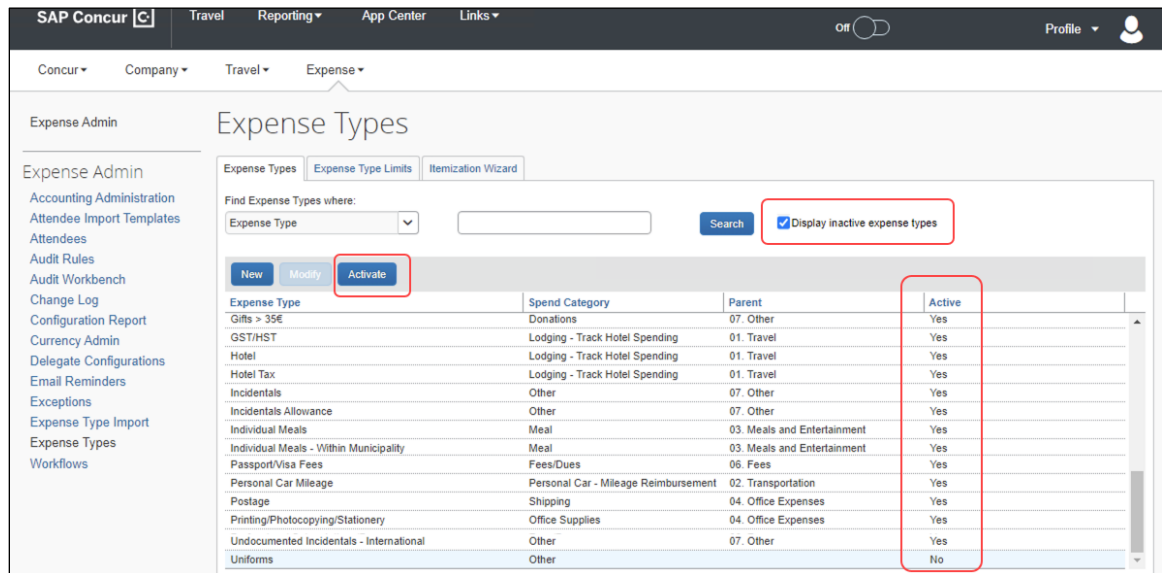


Click **Yes** to proceed.

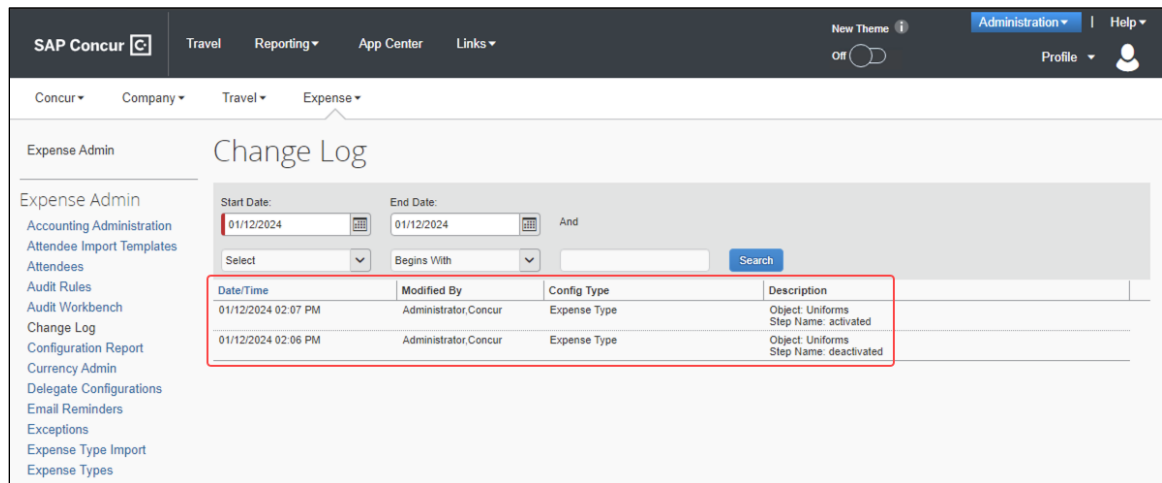
NOTE: Deactivating an expense type always involves the loss of a certain amount of data. Please read the confirmation text carefully before proceeding.

Filter expense types listing to display only active expense types or select the **Display inactive expense types** checkbox to view all expense types. A new column **Active**

displays the status of the expense types available using **Yes** (Active) and **No** (Inactive) indicators.



View a log of all the modifications made to an expense type in the **Administration > Expense > Change Log** (left menu) screen.



Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Mileage Service

Delegate Administrator May Reset Initial Distance Mileage for Personal Car

Overview

With this release, the Expense Configuration administrator (Unrestricted) delegating for a user will now be able to adjust the existing mileage on the user's personal car directly using the **Distance to date** field in the **Vehicle Configuration** page.

The screenshot shows the SAP Concur 'Vehicle Configuration' page. The page title is 'Vehicle Configuration' with a 'Back' link. Below the title is a note: 'You can use this page to register and manage vehicles for mileage expenses. To submit a mileage expense successfully, it is necessary to register at least one vehicle.' The form includes fields for Description (Sales Car), Ownership (Personal), Vehicle Type (Car - 4 CV), Accumulate Distance By (Vehicle), Period (Annually), Start Date (2024-01-01), and Distance to date (100 KM). There is a checkbox for 'Is Preferred' and buttons for 'Save' and 'Cancel'. A red box highlights the 'Distance to date' field. A text box with the text 'The user delegating for another user may use the Vehicle Configuration page to adjust the existing mileage shown in Distance to date. By clicking directly, the value in this text box may be changed to match the desired value, in this case, to reset the 100 KM to 0.' is positioned above the 'Distance to date' field. A tooltip message 'This field requires an integer value.' is displayed over the 'Distance to date' field. A 'Distance to date' field with the value '0 KM' is also visible.

By clicking the value directly, the current mileage attributed to the user's car may be adjusted as needed.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature change closes a functionality gap between the legacy and service versions of the Mileage feature.

Administrator Experience

The administrator delegating for a user clicks **Profile Settings** and navigates to the **Vehicle Configuration** page to access the selected car. Next, they click the **Distance to date** field to enter a new mileage amount for that user.

Configuration / Feature Activation

These changes are automatically available after January 24, 2024; there are no configuration or activation steps.

Miscellaneous

Enhancing Additional Fields with Most Recently Used (MRU) Feature

Overview

With this release, we are excited to announce the enablement of Most Recently Used (MRU) feature for location field, lists, and connected lists in the multi-edit dialog for expense entries in an expense report.

This feature has been implemented based on customer feedback to simplify the selection process for frequently used values in the multi-edit dialog.

BUSINESS PURPOSE

The enablement of MRU for location and list fields in the multi-edit dialog enhances the user experience by making it easier to access frequently used values, improving efficiency when creating or editing expense reports.

Administrator Experience

Users will now see most recently used values for location and any list/connected list fields in the multi-edit dialog, simplifying the selection process and reducing manual effort when entering data in the multi-edit dialog.

This feature is automatically available; there are no additional configuration or activation steps required for administrators.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

New Action Column Available in Expense Screens

Overview

As of February 20th, 2024, users can use two new action columns, indicated by  and , to perform single click actions or multiple actions such as edit, copy, or delete on the Expense screens, such as editing expense, itemizations, allocations, or travel diaries.

None of the existing functionalities are removed with this release:

- The user can click the row to open the expense details.
- The user can select multiple rows to edit common fields for all the selected expenses.

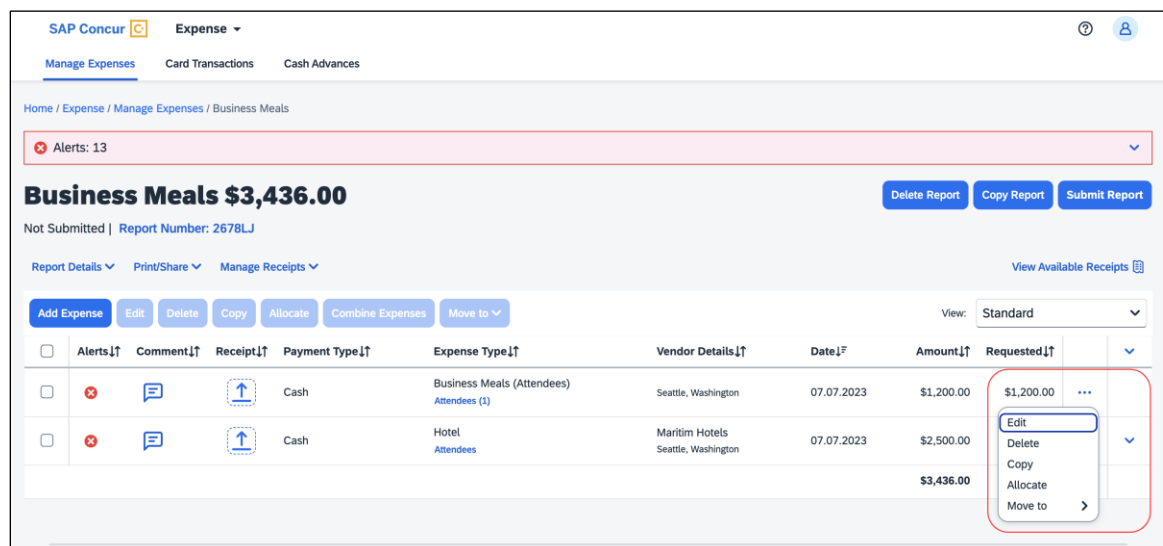
BUSINESS PURPOSE / CLIENT BENEFIT

This update allows users to execute actions easily and improves user experience for keyboard and screen reader users.

End-User Experience

All the existing Expense screens where you can perform actions have a new actions column. This column will always be visible. A dropdown list displays all the actions that you can perform by selecting a single row of data.

A button link displays for single actions. For multiple actions, a **See more** () button displays with a dropdown list embedded in it.



The screenshot shows the SAP Concur Expense screen for 'Business Meals' with a total of \$3,436.00. The table lists two expenses: 'Business Meals (Attendees)' for \$1,200.00 and 'Hotel Attendees' for \$2,500.00. A dropdown menu is open for the first row, showing actions: Edit, Delete, Copy, Allocate, and Move to.

Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested	
			Cash	Business Meals (Attendees)	Seattle, Washington	07.07.2023	\$1,200.00	\$1,200.00	...
			Cash	Hotel Attendees	Maritim Hotels Seattle, Washington	07.07.2023	\$2,500.00		
							\$3,436.00		

The updated Expense screens and their actions are:

- Reports list
- View

- Available Expenses
 - View
 - Delete
 - Move To
- Available Expenses > Add Expense
 - View
 - Add to Report
- Cash Advance
 - Remove
- Request
 - Remove
- Attendees
 - Remove
 - Create Group
- Attendees Favorite Group
 - Add
 - Remove
- Recent Attendees
 - Add
- Attendees Group
 - Add
- Allocations
 - Edit
 - Remove
- Report Entries
 - Edit
 - Delete
 - Copy
 - Allocate
 - Move to
- Report Entries (once the report is submitted)
 - View
- Itemizations List
 - Edit
 - Delete
 - Allocate

- Copy
- Itemizations List (once the report is submitted)
 - View
- Travel Diary
 - Edit
 - Delete

FOR EXAMPLE

SAP Concur Expense

Manage Expenses Card Transactions Cash Advances

07.07.2023 Maritim Hotels

Details Itemizations

Amount \$2,500.00 Itemized \$2,236.00 Remaining \$264.00

Create Itemization Edit Delete Copy Allocate

☐	Alerts↓↑	Date↑↓	Expense Type↓↑	Requested↓↑	
☐		04.07.2023	Hotel	\$400.00	...
☐		04.07.2023	Hotel Tax	\$12.00	
☐		05.07.2023	Hotel	\$400.00	
☐		05.07.2023	Hotel Tax	\$12.00	
☐	✖	05.07.2023	Business Meals (Attendees)	\$1,000.00	...
☐		06.07.2023	Hotel	\$400.00	...
☐		06.07.2023	Hotel Tax	\$12.00	...

Receipt

Click to upload Valid file type

SAP Concur Expense

Attendees

Business Meals (Attendees) \$1,200.00

Alerts: 3

Amount \$1,200.00 Attendees: 1 \$1,200.00 Remaining \$0.00

Add Remove Create Group Copy from Request

☐	Alerts	Attendee Name↑↓	Attendee Title↑↓	External ID↑↓	Status↑↓	Company↑↓	Custom 08↑↓	Attendee Entry Custom 1↑↓	Custom 13↑↓	Attendee Entry Custom	
☐	✖	NGE, Christian		christian@ng e.com				None Selected			...

Remove Create Group

Cancel Save

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Update to the Report Status Indicator

Overview

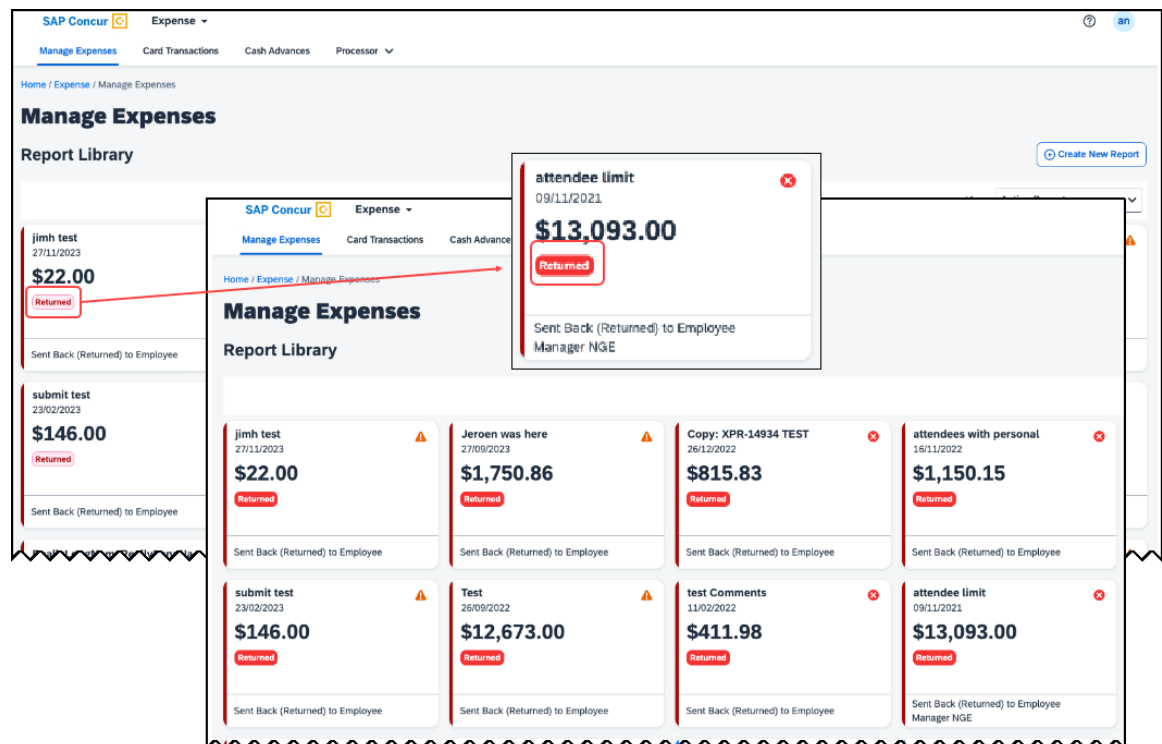
The rectangular indicator that shows the status of an expense report is now updated. With the change, this indicator is more prominent and easier to read than the prior version.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves the user's accessibility to the status information of the expense report by providing greater visibility.

End-User Experience

The end-user will now see, in selected screens, a solid color background and white text in the tiles that display the status of the expense report.



Configuration / Feature Activation

These changes are automatically available after January 30, 2024; there are no configuration or activation steps.

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Cash Advance

****Planned Changes** FIS / ICS Client Cash Advance Improvements**

Information First Published	Information Last Modified	Feature Target Release Date
February, 2024	--	February 15, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Two changes to the Cash Advance feature will be available in an upcoming release. These changes apply to clients using the Cash Advance feature in combination with either the Financial Integration Services (FIS) API with client web services or SAP ICS.

- **Cash Advance Pass or Fail Check and Filter:** If a cash advance fails to be posted to the financial system, it will be filtered from the user's view and be unavailable for addition to their expense report(s).
- **Automatic Status Change to Complete:** Once a cash advance is fully utilized it will be automatically changed from a status of Issued to a status of Complete.

BUSINESS PURPOSE / CLIENT BENEFIT

These feature changes simplify cash advance functionality by listing only valid advances for addition to a report and clarifying the status of an advance that is fully utilized.

End-User Experience

The end-user adding a cash advance to their expense report(s) will now see only those advances that are successfully posted to the financial system. There are no changes to the user interface.

Administrator Experience

The Cash Advance administrator will see a status change for a fully utilized cash advance from Issued to Complete when working with advances in the tool.

Configuration / Feature Activation

These changes are automatically available after February 15, 2024; there are no configuration or activation steps.



For more information, refer to the *Concur Expense: Cash Advance Setup guide*.

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

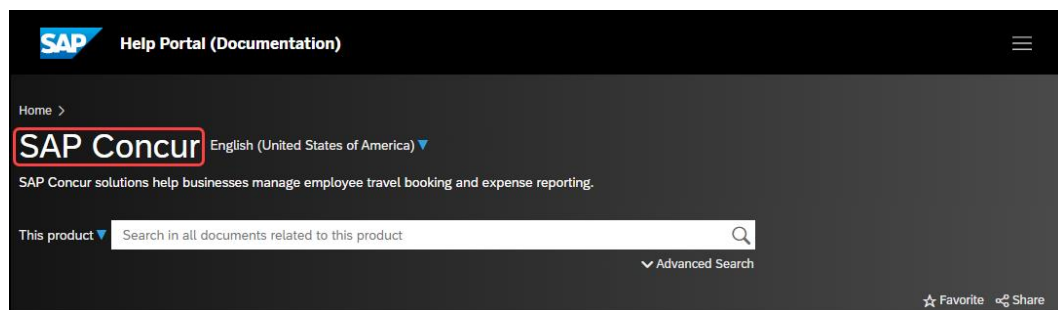
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

► ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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SAP Concur Release Notes Concur Expense Professional / Premium	
Month	Audience
Release Date: March 23, 2024 Update #1: March 26, 2024	Client FINAL

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Release Notes

This document contains the release notes for Concur Expense professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Audit Rules

Check for Expense Date Within Leave of Absence Date Range

Overview

With this release, the Audit Rules administrator may now create conditions that compare a data object date field (for example, an expense entry transaction date) against a Leave Of Absence (LOA) date range provided from the user's profile to determine if the date falls within a LOA period. Based on company policy, the resulting exception can prevent submission of the report or flag it for additional scrutiny during approval reviews.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature lets a company identify when the report's dates or expense dates conflict with company policy about incurring expenses during a leave of absence.

What the Administrator Sees

The administrator uses audit rule conditions to create a rule that compares the report date and/or expense dates found in a report against the user's LOA, by date range. The comparison is performed when the report is saved or submitted and can prevent the report from submission if the report and/or expense dates fall within the leave range and the absence type does not allow for expensing during the absence.

TYPES OF LOA

Leave of Absence information that is recorded in the user profile is classified by type of absence:

- **Voluntary:** An employee chooses to take time off from an employer (i.e. for personal reasons)
- **Mandatory:** An employer is required to grant the employee time off from work (i.e. for maternity / paternity leave, or for mandatory military service)

HOW THE DATE RANGES ARE HANDLED

The administrator uses two new date Operators, *Within Employee Mandatory Leave of Absence* and *Within Employee Voluntary Leave of Absence* when configuring the date range condition.

The screenshot shows the 'Audit Rules' configuration interface. The 'Conditions' tab is selected. A table with columns 'Data Object/Operator', 'Field/Value', and 'Operation' is visible. The 'Data Object/Operator' dropdown is set to 'Entry'. The 'Field/Value' dropdown is set to 'Transaction Date'. The 'Operation' dropdown is set to 'Within Employee Voluntary Leave of Absence'. A red box highlights this operation. A tooltip shows two options: 'Within Employee Voluntary Leave of Absence' and 'Within Employee Mandatory Leave of Absence'. A red arrow points from the 'Within Employee Voluntary Leave of Absence' option in the tooltip to the 'Within Employee Voluntary Leave of Absence' option in the 'Operation' dropdown.

Note the following when using this feature:

- Both the LOA Start and End dates, and the absence type, Mandatory or Voluntary, are used
- If an employee has multiple historical LOAs, the rule will test the date as follows:
 - ◆ Between a Start and End date of a *single* range, such as Range A
 - ◆ Not between the Start date of Range A, and the End date of Range B
- A system exception appears if Expense cannot reach the user data from the user's profile service

Configuration / Feature Activation

Companies wishing to use this new option must:

1. Load LOA data into the user profile via the following API:
 - ◆ User Provisioning service
 - ◆ Identity v4.1
 - ◆ Identity v4
2. Create a custom audit rule employing these new conditions.



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



For more information about loading LOA ranges into the user profile, refer to the User API at developer.concur.com.

Expense Pay

Additional AMEX Corporate Card Programs Now Supported for Europe

Overview

Expense Payment Manager now supports reimbursement for the following AMEX corporate credit card programs issued out of Europe:

- American Express – EMEA – Czechia (CZK)
- American Express – EMEA – Norway (NOK)
- American Express – EMEA – Poland (PLN)

BUSINESS PURPOSE / CLIENT BENEFIT

This update allows end users to automate the reimbursement process for corporate AMEX cards in these countries/currencies and can expedite the processing of credit card expenses.

Administrator Experience

These additional credit card programs are available to reimbursement admins on the **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:** Text input field.
- Payment Type:** Dropdown menu.
- Program Type:** Dropdown menu with 'American Express - EMEA - Poland' selected. A red box highlights this field, and a 'Verify IIN' link is to its right.
- Currency:** Text input field with 'PLN' entered.
- Active:** Dropdown menu with 'Yes' selected.
- Classic:** Unchecked checkbox.
- Payment Provider:** Checked checkbox.
- Corporation Number (CI):** Text input field.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

End-User Experience

You will have to setup the card program and configure a card batch in the **Configure Batches** area of Payment Manager. To complete setting up the card program, request the **Corporation Number (CID)** from your AMEX representative, to enter in the corresponding field when setting up the card program.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Verify

Audit Profile: Quick Start Profiles

Overview

Currently, users manually configure **Checks** when creating **Audit Profiles**. From March 22 to March 24, a new feature will be available. Users can select **Add Essential Checks** to expedite the creation of profiles. This change will also be applicable to existing profiles where previously no checks were added.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature is being introduced to streamline the profile creation process and to avoid inconsistencies in different user profiles.

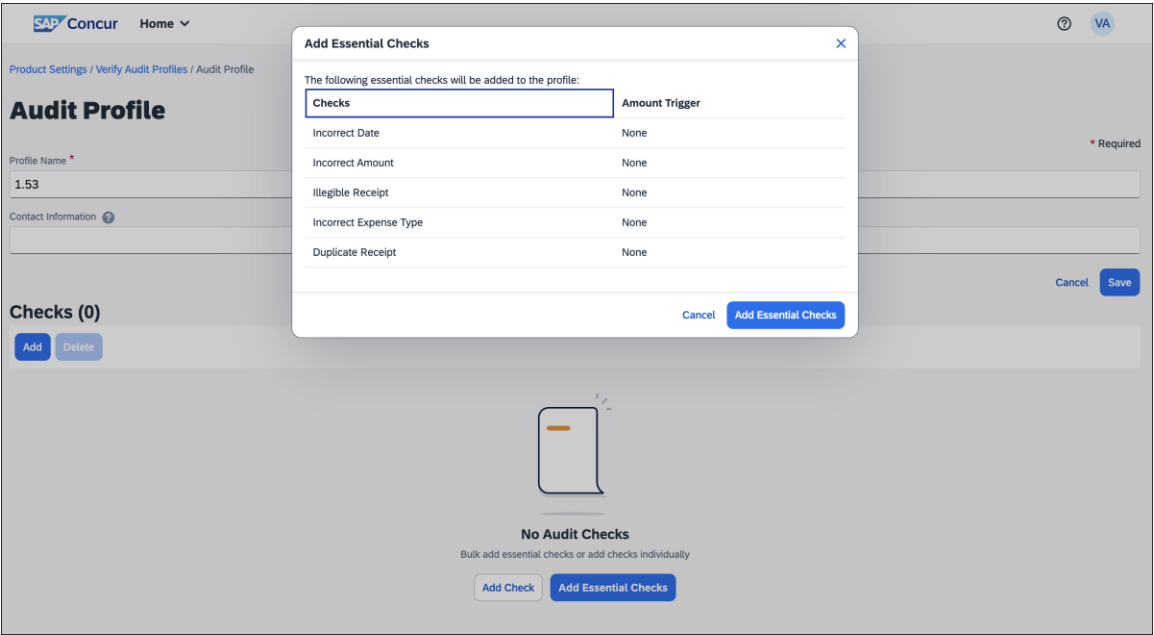
Administrator Experience

Currently, when a profile is being created, a user must select **Add Check** and add each check to the profile individually. This new feature enhances efficiency by adding default checks to each profile. Existing profiles which currently have no checks included, can also have checks added by clicking **Add Essential Checks**.

Selecting **Add Essential Checks** automatically adds the following checks to the profile:

- Incorrect Date
- Incorrect Amount
- Illegible receipt
- Expense type
- Duplicate receipt

Example



Check values can also be updated by the administrator at any time, after these essential checks are added.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Traveler Name Check Update

Overview

Currently, the description of the traveler name check indicates that SAP Concur validates for an exact match of the traveler’s name on the receipt. However, the check only confirms the presence of a traveler name.

SAP Concur will update the descriptions to accurately represent the true function of this check.

BUSINESS PURPOSE / CLIENT BENEFIT

This change is being made to align the description with the functionality of the check.

Administrator Experience

Between March 22 and March 24, SAP Concur will update the check description of **Traveler Name** check to better reflect its functionality. This ensures the information provided matches the actual validation of the check.

Previously, the description read "We review the receipt and attempt to determine the traveler name. We compare the name on the receipt to the name from the expense report and will raise an exception if we suspect they don't match."

The updated description will read "We review the receipt and attempt to identify if a traveler name is present. We will raise an exception if a name is not present."

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Company Card

Planned Changes Enhancements to the Manage Transactions Screen

Information First Published	Information Last Modified	Feature Target Release Date
March 2024	--	April 14, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

On April 14th, enhancements to the **Manage Transactions** screen will be available to the Company Card administrator for evaluation. These changes will be visible by default and the administrator may work with the new user interface and then decide to revert to the earlier version or continue with the newer version which will become the default user interface in an upcoming release.

NOTE: More feature information will be available in an upcoming release note.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves the company card experience by automatically displaying search results from the previous 30 days with the ability to perform a more complex search that displays hidden, visible, duplicate, and expensed transactions in a column order view familiar to administrators working in a financial statement format.

Administrator Experience

The Company Card administrator will see the simple search format of employee transactions of the previous 30 days. Transactions that are both hidden and visible to

employees (including transactions that are already on an expense report) will be returned.

From this simple format, the administrator clicks **Open Filters** to refine the search:

The **Last 4 Digits...** search now combines the logic for *all* the potential typed values:

Duplicate transactions are displayed using the **Potential Duplicate** attribute, and the informational window includes a link to release the transaction to the employee:

Transactions both already assigned to a report or posted prior to assignment date are clearly marked. For some status types, hovering a cursor opens an informational window describing the condition, action, and links to take action as needed:

Date	Status	Last 4 Digits of Card	Assignee Name
02/15/2024	Visible to Employee Assigned to a Report		
02/15/2024	Hidden for Employee Potential Duplicate		
02/15/2024	Hidden for Employee Posted Prior to Assignment Date		
02/15/2024	Hidden for Employee Potential Duplicate		
02/15/2024	Hidden for Employee Posted Prior to Assignment Date		
02/15/2024	Hidden for Employee Posted Prior to Assignment Date		
02/15/2024	Hidden for Employee Potential Duplicate		
02/15/2024	Hidden for Employee Posted Prior to Assignment Date		

Transaction Hidden
Posted Prior to Assignment Date
This transaction has been hidden because it is posted prior to card assignment date minus transaction release period.
Releasing this transaction will make it visible to the user for addition to an expense report.
Release this transaction
Card assignment date: 02/29/2024
Currently configured transaction release period: 5 (days)
Modify Transaction Release Setting
Please note: Existing transactions imported prior to modifying this setting will need to be manually released.

Moving Between the Two Manage Transactions Windows

In the figures above both the **Manage Transactions** and **Preview Manage Transactions** tabs are shown for clarity. Only a *single* tab will be displayed for the benefit of the administrator, who may move from the new user interface to the original interface using the **Revert to prior experience** link.

[Learn More](#) **Use Previous Experience** ✕

Configuration / Feature Activation

The change to the new user interface is visible by default and the administrator may revert to the original interface as needed. Note the new interface will display at any time the administrator moves from the screen and back again in a single session.

****Planned Changes** Updates to New Card Account Pending Assignment Email**

Information First Published	Information Last Modified	Feature Target Release Date
March 2024	--	April 4, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

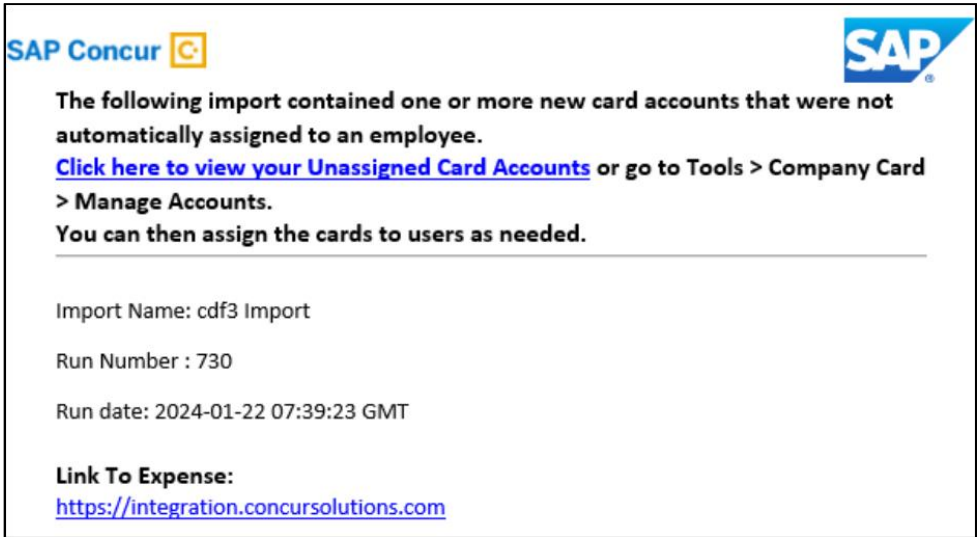
On April 4th, the email notifying the client of unassigned card accounts that require assignment will be changed. At that time, the text will be modified and a link to assign the accounts will be provided directly in the body of the email.

BUSINESS PURPOSE / CLIENT BENEFIT

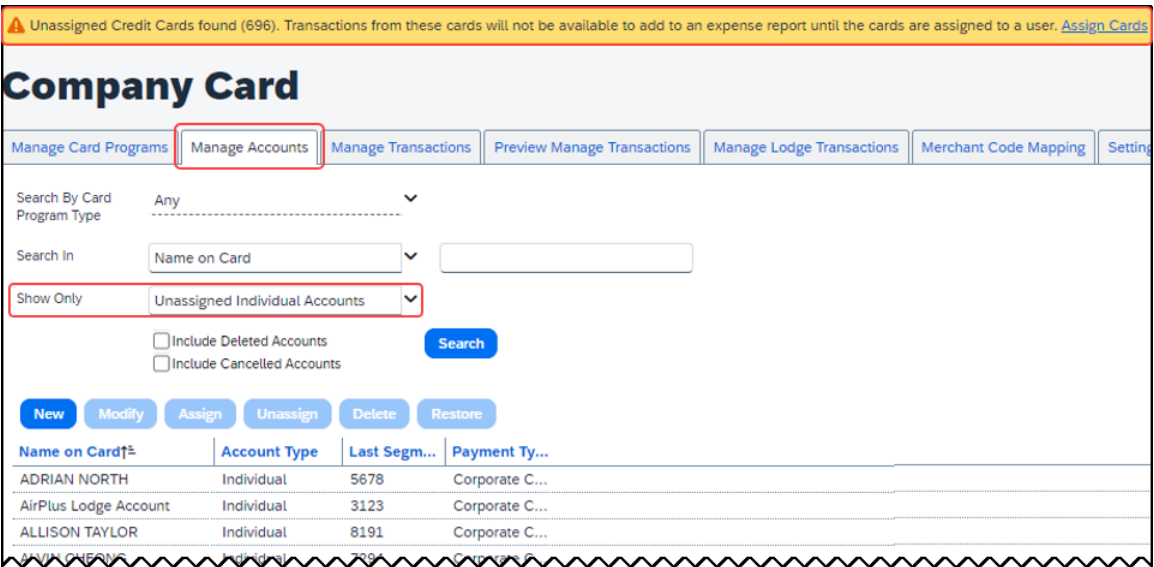
This feature improves the company card experience by clearly describing the error, the required action, and directing the administrator to the page using a link.

Administrator Experience

The Company Card administrator will see a modified email detailing the results of the card import.



In that email, modified text explaining that the import has unassigned card accounts that require assignment will be seen and a link that opens the **Manage Accounts** page where the unassigned accounts are listed will be available.



Clicking **Assign Cards** (upper-right corner) lets the administrator begin this task.

Configuration / Feature Activation

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

Expense Pay****Planned Changes** Enhanced User Interface in Payment Manager**

Information First Published	Information Last Modified	Feature Target Release Date
March 2024	--	April 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

In an upcoming release, SAP Concur will enhance the **Funding Accounts** and **View Funding** screens to provide easier access to relevant information and to remove outdated elements from the user interface.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature will provide faster access to relevant information on screen in a simplified manner and reduces the number of clicks required to view the necessary information.

Administrator Experience

Navigate to the **Payment Manager > Configure Batches > Funding Account** screen to see the following updates:

- The **Bank ID** column will display the term **Provider Account** instead of **Global Account**.
- The **Account Number** column will not be populated with the **Provider Account ID** for Convera accounts.
- Removed the following columns: **Pay Cycle**, **Funding Type**, **On Hold**, **Active Date**, and **Test** as they are no longer in use or don't provide useful information.
- Added a new column labeled **Provider**. It will display the provider name **Worldline** or **Convera**, based on which provider was selected in the account.

Navigate to the **Payment Manager > Monitor Batches > View Funding** screen to see the following updates:

- Rearranged the **Global Funding** tab to be placed first as it contains more relevant information. The other two tabs **Direct Debit** and **Pre Fund** are no longer in use and hence, they will be removed from the UI.

- The **Global Funding** tab will be renamed to **Provider Funding Amounts**.
- The **Bank Statements** tab will be removed as it will not be in use any longer.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Localization

****Planned Changes** Removal of Expense Types Descriptions**

Information First Published	Information Last Modified	Feature Target Release Date
March 2024	--	April 12, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

As of April 12th, 2024, SAP Concur will deprecate the descriptions for expense types. Currently, there is no possibility to set the descriptions for expense types in the Concur user interface or APIs, but these descriptions do display in the **Localization** tab in Concur Expense settings.

However, the localized text is not used within SAP Concur.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature prepares the client who uses the localization area for expense types for future feature enhancements.

Administrator Experience

In the **Administration > Expense > Expense Admin > Localization** tab, administrators will no longer see the contents in the **Description** and **Source Value** columns. All default descriptions (and any translated values) will be removed.

Source Value	Expense Type	Source Value	Description	Last Modified
01. Travel	01. Travel	Travel	Travel	03/01/2024
02. Transportation	02. Transportation			09/18/2020
03. Meals and Entertainment	03. Meals and Entertainment	Meals and Entertainment	Meals and Entertainment	09/18/2020
04. Office Expenses	04. Office Expenses	Office	Office	09/18/2020
05. Communications	05. Communications			09/18/2020
06. Fees	06. Fees			09/18/2020
07. Other	07. Other	Rename type with a similar exp...	Rename type with a similar exp...	09/18/2020
08. Relocation/Ex-Pat	08. Relocation/Ex-Pat			09/18/2020
09. Cash Advance	09. Cash Advance	Parent expense type for cash a...	Parent expense type for cash a...	09/18/2020
Agency Booking Fees	Agency Booking Fees			09/18/2020
Air Fare	Air Fare	Canada airfare. Eligible for Pre...	Canada airfare. Eligible for Pre...	09/18/2020
Airfare en	Airfare en	Eligible for Prepop. All charges ...	Eligible for Prepop. All charges ...	04/19/2023
Airfare Ticket Tax	Airfare Ticket Tax			09/18/2020
Airline Fees	Airline Fees			04/05/2023

NOTE: Administrators must save any translations or texts that was used in the localization area for expense types.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Miscellaneous

Planned Changes Keyboard Shortcuts for Expense Screens

Information First Published	Information Last Modified	Feature Target Release Date
March 8, 2024	--	March 26, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for March 26th, 2024, SAP Concur will enable convenient keyboard shortcuts in selective Concur Expense screens such as **Expense Home, Report Page, and Expense Entry Page.**

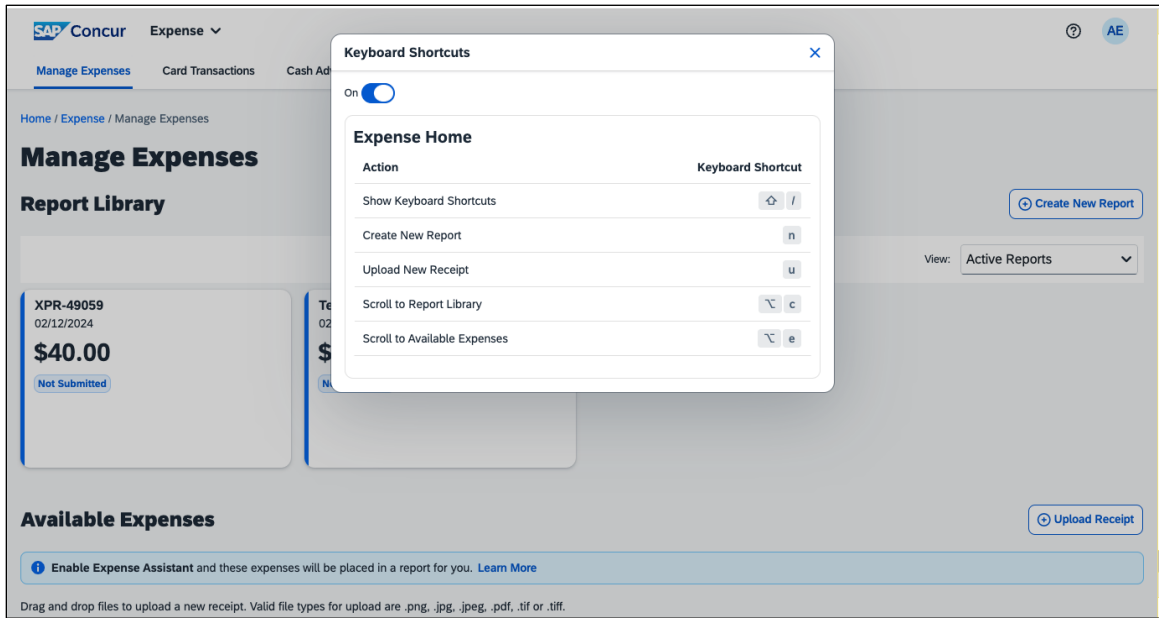
NOTE: This feature will currently be available in English only.

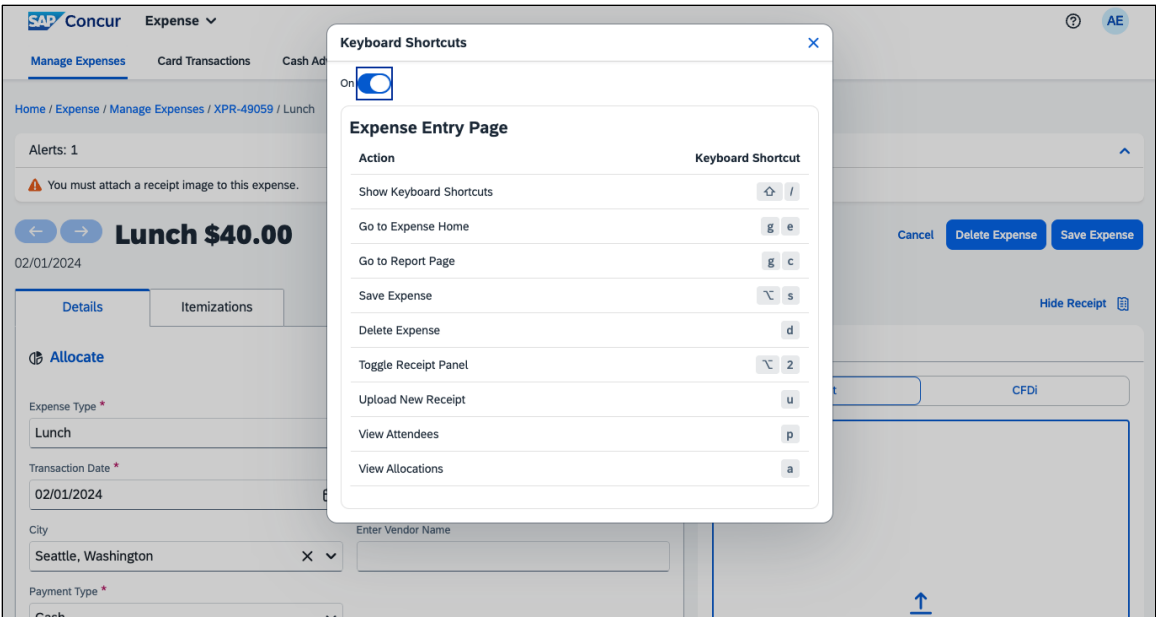
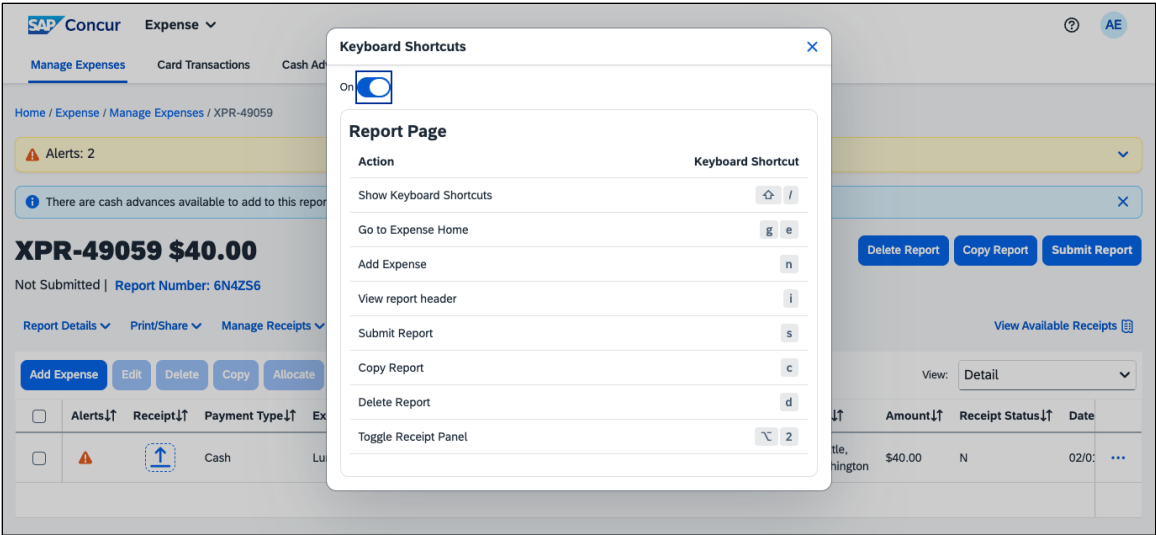
BUSINESS PURPOSE / CLIENT BENEFIT

This update will offer users a more convenient way to navigate the expense application faster, ultimately improving productivity, efficiency, and user satisfaction.

End-User Experience

On selective Expense screens such as **Expense Home, Report Page, and Expense Entry Page,** press **SHIFT + /** to view the available shortcuts and to toggle the keyboard shortcuts ON or OFF.





Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Reports

****Planned Changes** Preferred Name for Expense Submitter**

Information First Published	Information Last Modified	Feature Target Release Date
March 15, 2024	--	Q2, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for the second quarter of 2024, Concur Expense will support preferred names for users submitting expenses. The users will be able to view the preferred name that has been setup for approvers, company attendees, and other elements that display a name field, if the preferred name has been configured for the user.

Today, in Concur Expense, users can set a preferred name for themselves. In the second quarter of 2024, Concur will display the preferred name for approvers, company attendees, and other names that an expense submitter will see in the system.

For example, if a user with expense approver permissions has specified a preferred name, this preferred name will display to users submitting expenses, when selecting an approver, or when viewing the timeline for an expense report.

Similarly, if another user in the same company has specified a preferred name in Concur Expense, an expense submitter will see the preferred name when searching for an attendee, and when the user has been added as an attendee to an expense.

BENEFIT

This update will offer users the flexibility to set up their own preferred names at work, compared to using their given first names and improves user satisfaction.

End-User Experience

The user who is an expense submitter will see the preferred names that is configured for other employees that they interact with in the system, if their locale supports preferred name. This preferred name will appear in places where the users may have seen the given name of the employee previously.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

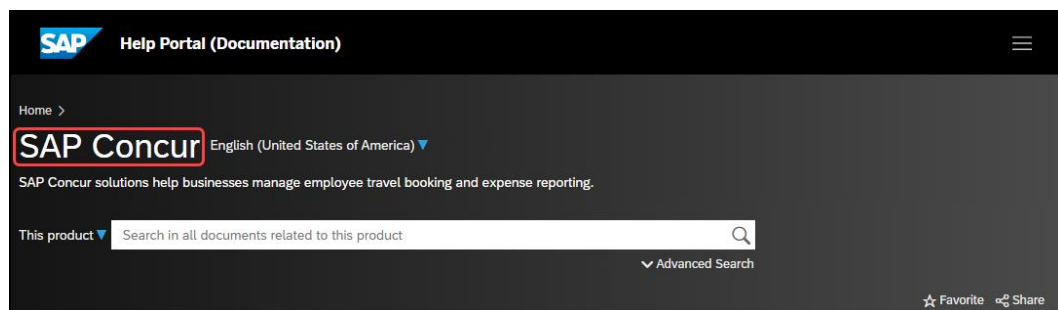
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

▶ ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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SAP Concur Release Notes Concur Expense Professional / Premium	
Month	Audience
Release Date: April 2024 Initial Post: April 19, 2024	Client FINAL

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Release Notes

This document contains the release notes for Concur Expense professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Custom Fields

Next Generation: Check Box Data Value is Now False and not Null

Overview

On April 9th, a change to the behavior under the Next Generation (NextGen) user interface is applied to check boxes created using the custom fields feature. Now, for an unselected check box, the system will always send a value of False instead of a value of Null to match the behavior of the previous user interface.

This feature standardizes the behavior of the NextGen and prior user interfaces so that a value of False is the default value sent by NextGen to Expense and this same value will appear on data extraction.

Administrator Experience

The administrator tasked with data extraction will no longer see a value of Null when working with an unselected check box under the NextGen user interface but will instead see a value of False just as they did under the earlier user interface.

Configuration / Feature Activation

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

Expense Pay

Enhanced User Interface in Expense Payment Manager

Overview

As of April 18th, 2024, SAP Concur has enhanced the **Funding Accounts** and **View Funding**, and **Batch Definitions** screens to provide easier access to relevant information and to remove outdated elements from the user interface.

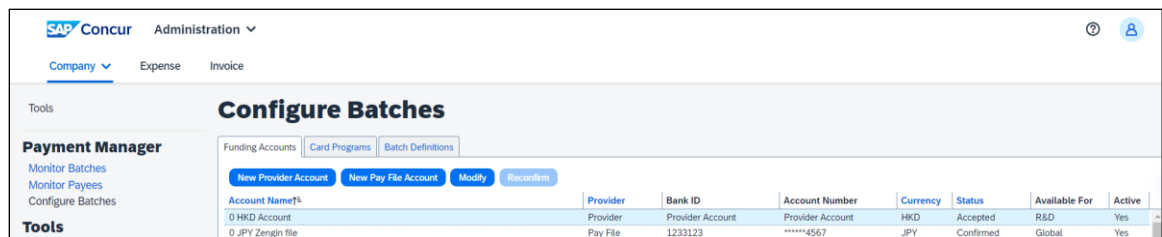
This update provides faster access to relevant information on screen in a simplified manner and reduces the number of clicks required to view the necessary information.

Administrator Experience

Navigate to the **Payment Manager > Configure Batches > Funding Account** screen to see the following updates:

- The **Bank ID** column displays the term **Provider Account** instead of **Global Account** when using Convera as the payment provider.
- The **Account Number** column is populated with the term **Provider Account**. In the future, this will be used to display the provider account ID you setup with your payment provider.
- Removed the following columns: **Pay Cycle**, **Funding Type**, **On Hold**, **Active Date**, and **Test** as they are no longer in use or don't provide useful information.
- Added a new column labeled **Provider** which displays the term **Provider**. In the future, this will be used to display the payment provider's name you setup the account with.
- The **Funding Accounts** screen now displays a full page of funding accounts for the user when searching for the required funding account with multiple pages of accounts. Previously, only 10 records displayed when user clicked the next page icon.

Example:



Account Name ¹	Provider	Bank ID	Account Number	Currency	Status	Available For	Active
0 HKD Account	Provider	Provider Account	Provider Account	HKD	Accepted	R&D	Yes
0 JPY Zengin file	Pay File	1233123	*****4567	JPY	Confirmed	Global	Yes

Configure Batches

Funding Accounts | Card Programs | Batch Definitions

[New Provider Account](#) [New Pay File Account](#) [Modify](#) [Reconfirm](#)

Account Name [†]	Provider	Bank ID	Account Number	Currency	Status	Available For	Active
DKK WUD	Provider	Provider Account	Provider Account	DKK	Accepted	Global	Yes
Delta Sync Test	Classic	091000019	*****4321	USD	Pending	R&D	Yes
EUR Pay File	Pay File	APMMDKKKXXX	*****6789	EUR	Confirmed	Sales	Yes
EUR WUD	Provider	Provider Account	Provider Account	EUR	Accepted	Global	No
EURO DD On Hold	Classic	BDDEFRRP	*****9012	EUR	Pending	Global	Yes
EURO Payfile Test	Pay File	BDDEFRRP	*****9012	EUR	Confirmed	Global	Yes
France EURO	Provider	Provider Account	Provider Account	EUR	In Progress	Sales	No
Funding for AMEX CA	Provider	Provider Account	Provider Account	CAD	In Progress	Global	No
GBP WUD	Provider	Provider Account	Provider Account	GBP	Accepted	Global	Yes
GP EURO	Provider	Provider Account	Provider Account	EUR	Accepted	Marketing, Sales	Yes
GP SU 2107	Provider	Provider Account	Provider Account	USD	Accepted	Marketing	Yes
GP USD SU 2106	Provider	Provider Account	Provider Account	USD	Accepted	Marketing	Yes
Guam USD WUD	Provider	Provider Account	Provider Account	USD	Accepted	R&D	No
HKD Hold Test	Classic	123123	*****9012	HKD	Pending	Global	Yes
HKD WUD	Provider	Provider Account	Provider Account	HKD	Accepted	Global	No
INR 6/24 2	Pre Fund	12345678909	123456789012	INR	Unsent	Global	Yes
INR John GP	Provider	Provider Account	Provider Account	INR	Accepted	Global	Yes
INR Unsent Tests	Pre Fund	12345678909	123456789012	INR	Unsent	Global	Yes

Page 2 of 5 | Displaying accounts 41 - 80 of 165

When you add a new card batch in the **Batch Definitions** screen, selecting or changing the card program automatically displays a filtered list of funding accounts based on the currency used for the card program.

Configure Batches

Funding Accounts | Card Programs | Batch Definitions

Add Card Batch Definition

Batch Name:

Reimbursement Method:

Available For:

Card Program:

[New Provider Account](#) [New Pay File Account](#) [Modify](#) [Reconfirm](#) [Set Funding Account](#)

Live Funding Account

Account Name	Bank ID	Account Number	Currency	Status	Active
0 HKD Account	Provider Account	Provider Account	HKD	Accepted	Yes
00 HKD	Provider Account	Provider Account	HKD	Accepted	Yes
HKD Hold Test	123123	*****9012	HKD	Pending	No

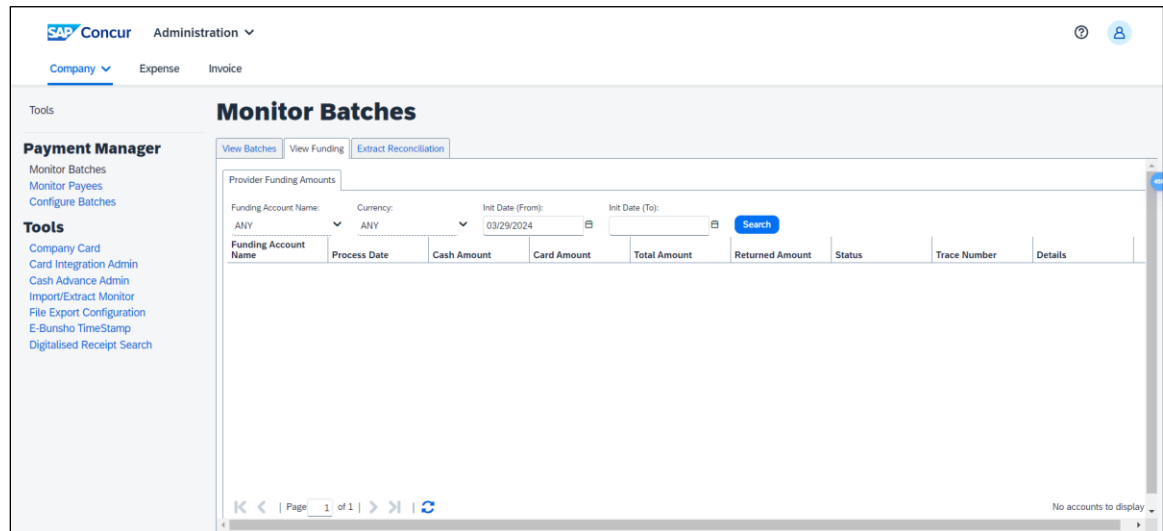
Available Funding Accounts

Account Name [†]	Bank ID	Account Number	Currency	Status	Active
☐ 0 HKD Account	Provider Account	Provider Account	HKD	Accepted	Yes
☒ 00 HKD	Provider Account	Provider Account	HKD	Accepted	Yes
☐ HKD Hold Test	123123	*****9012	HKD	Pending	No

Navigate to the **Payment Manager > Monitor Batches > View Funding** screen to see the following updates:

- Rearranged the **Global Funding** tab to be placed first as it contains more relevant information. The other two tabs **Direct Debit** and **Pre Fund** is no longer be in use and hence, they are removed from the UI.
- The **Global Funding** tab is renamed to **Provider Funding Amounts**.

- The **Bank Statements** tab is removed as it is no longer relevant.



Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Updates to the Payment Status Timeline

Overview

A new payment status timeline button is added to the Expense Payment Manager, as a part of the **Monitor Payees** screen, to aid in understanding the status and the history related to a payment.

This update helps provide more meaningful information to the administrator when tracking a payment and help answering employee inquiries about their payments. It also provides faster access to more relevant information in a centralized and simplified display.

Administrator Experience

Navigate to the **Payment Manager > Monitor payees > Report Payees** screen to access the new **View Payment History** button. The button is disabled until a payment is selected.

The screenshot shows the 'Monitor Payees' interface. At the top, there are tabs for 'Report Payees', 'Cash Advance Payees', and 'Employee Banking'. Below these are search filters for 'Find report payees where', 'Employee List Name', 'Status', 'Payee Type', 'Currency', 'Reimbursement Method', 'Approve Date (From)', and 'Approve Date (To)'. A 'Search' button is present. Below the filters, there are several action buttons: 'Create', 'Change Batch', 'Client Pay', 'Place On Hold', 'Reverse Client Pay', and 'View Payment History'. The 'View Payment History' button is highlighted with a red rectangle. Below the buttons is a table with columns: Report Name, Report ID, Payment Demand ID, Approved Date, Payee Name, Amount, Currency, Reimbursement Method, Payee Type, Status, and Batch ID. The table contains two rows of data.

Report Name	Report ID	Payment Demand ID	Approved Date	Payee Name	Amount	Currency	Reimbursement Method	Payee Type	Status	Batch ID
Conference expenses...	03F9EA473B3249BADF64	4593	10/06/2023	PLN, Poland	75.00	PLN	Expense Pay By Concur	Employee	Aborted	02b9d...
October Expenses Per...	7C230F3964EC4C80ADC3	4592	10/06/2023	PLN, Poland	355.00	PLN	Expense Pay By Concur	Employee	Aborted	02b9d...

Select a payment and click the **View Payment History** button to display a timeline view for the payments, including their batches and the various statuses as the payment progressed.

The screenshot shows the 'Monitor Payees' interface with a 'Payment Status Timeline' modal open. The modal displays a timeline of events for a specific payment. The timeline includes the following events:

- Paid**: Payment (id: 4553) was paid on 09/12/2023
- Sent**: Payment (id: 4553) was sent for processing on 09/12/2023 03:11 PM
- Created**: Payment (id: 4553) was created and added to batch: 181f9407-2f8d-4034-b63a-1c14521f9f05 on 09/12/2023 03:11 PM
- Banking Updated**: The employee banking was updated on 09/12/2023 03:11 PM
- Banking Failed**: The employee banking was set to failed on 09/12/2023 03:10 PM. Failure reason: 01051
- Returned**: Payment (id: 4552) was returned on 09/12/2023 03:10 PM
- Sent**: Payment (id: 4552) was sent for processing on 09/12/2023 03:10 PM
- Created**: Payment (id: 4552) was created and added to batch: 6d5c914f-53de-4b0d-8b4b-a0967397e3ee on 09/12/2023 03:10 PM

The modal also shows the Report ID: BB18297051DF40EF8BFA | Approved Date: 09/12/2023 | Payment Amount: 179.00 PLN. Below the timeline, there is a table with columns: Reimbursement Method, Payee Type, Status, and Batch ID. The table contains two rows of data.

Reimbursement Method	Payee Type	Status	Batch ID
By Concur	Employee	Paid	ac91ct...
By Concur	Employee	Paid	ef72a1...

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Localization

Removal of Expense Types Descriptions

Overview

As of April 12th, 2024, SAP Concur has deprecated the descriptions for expense types. Currently, there is no possibility to set the descriptions for expense types in

the Concur user interface or APIs, but these descriptions do display in the **Localization** tab in Concur Expense settings.

However, the localized text is not used anywhere within SAP Concur.

This feature prepares the client who uses the localization area for expense types for future feature enhancements.

Administrator Experience

In the **Administration > Expense > Expense Admin > Localization** tab, administrators can no longer see the contents in the **Description** and **Source Value** columns. All default descriptions (and any translated values) are removed.

Expense Admin

Localization

Edit Localization | Export Localization | Import Localization

Source Language: English | Target Language: English

Find text in: English | Find text containing: | Search

Save | Cancel

Source Value	Expense Type	Source Value	Description	Last Modified
01. Travel	01. Travel	Travel	Travel	03/01/2024
02. Transportation	02. Transportation			09/18/2020
03. Meals and Entertainment	03. Meals and Entertainment	Meals and Entertainment	Meals and Entertainment	09/18/2020
04. Office Expenses	04. Office Expenses	Office	Office	09/18/2020
05. Communications	05. Communications			09/18/2020
06. Fees	06. Fees			09/18/2020
07. Other	07. Other	Rename type with a similar exp...	Rename type with a similar exp...	09/18/2020
08. Relocation/Ex-Pat	08. Relocation/Ex-Pat			09/18/2020
09. Cash Advance	09. Cash Advance	Parent expense type for cash a...	Parent expense type for cash a...	09/18/2020
Agency Booking Fees	Agency Booking Fees			09/18/2020
Air Fare	Air Fare	Canada airfare. Eligible for Pre...	Canada airfare. Eligible for Pre...	09/18/2020
Airfare en	Airfare en	Eligible for Prepop. All charges ...	Eligible for Prepop. All charges ...	04/19/2023
Airfare Ticket Tax	Airfare Ticket Tax			09/18/2020
Airline Fees	Airline Fees			04/06/2023

NOTE: Administrators must save any custom translations or texts that was used in the localization area for expense types.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Mileage Service

Update - Administrator Delegating for a User May Reset Initial Distance Mileage for Personal Car

Overview

In the February release notes it was stated that the administrator for Expense Professional or Standard edition, while delegating for a user, could now reset the initial distance of the user's personal car. With this release, the Can Administer role in Standard and the Expense Configuration administrator (Restricted) role in Professional may now perform this task for their users.

This feature change lets the client assign the role and complete this task at their site, providing flexibility and is a result of feedback from our client base.

Configuration / Feature Activation

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



For more information refer to the *Concur Expense: Car Configuration Setup*

Guide, the *Concur Expense: Mileage Service Setup Guide*, and the *Concur Expense: Mileage Service Setup Guide for Concur Standard Edition*.

Miscellaneous

Keyboard Shortcuts for Expense Screens

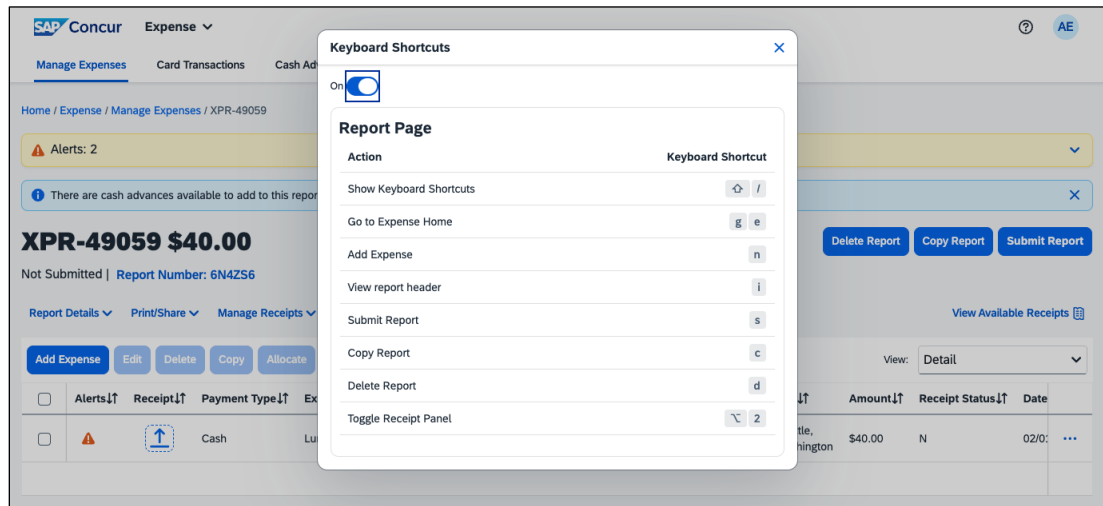
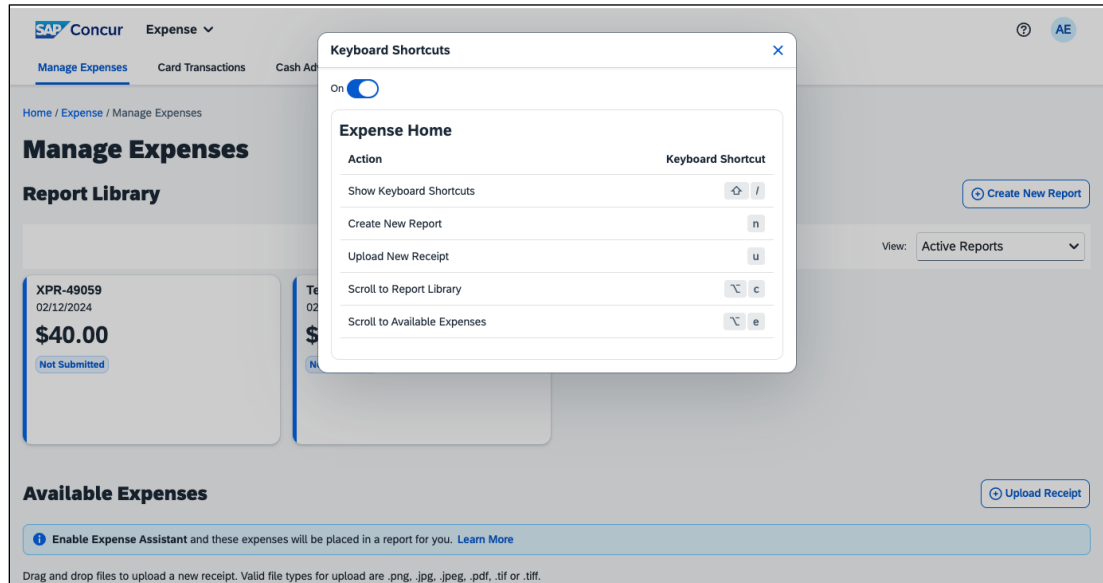
Overview

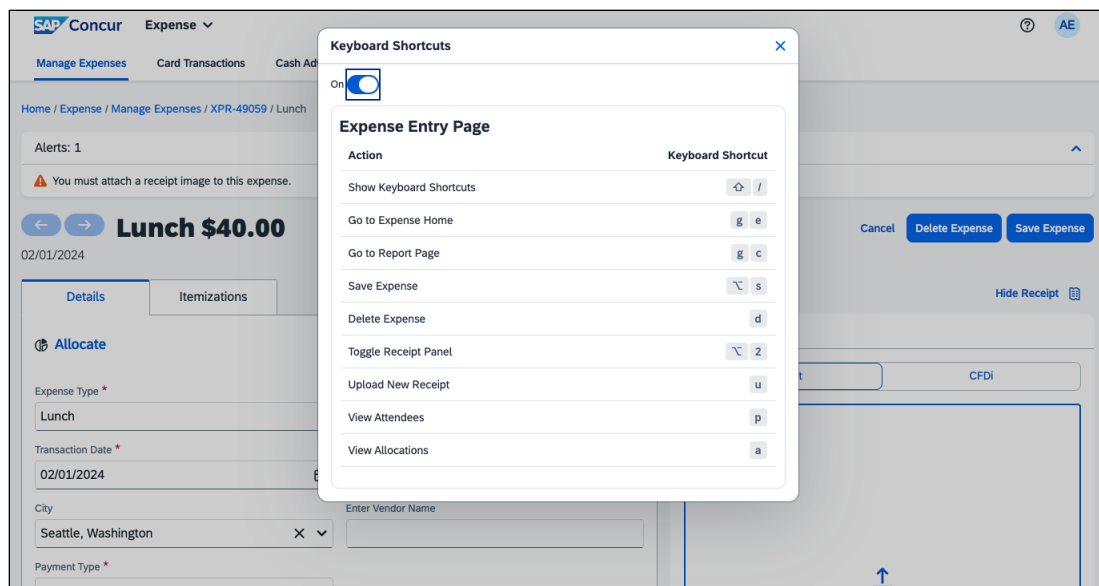
SAP Concur has enabled convenient keyboard shortcuts in selective Concur Expense screens such as **Expense Home**, **Report Page**, and **Expense Entry Page**. This update offers users a more convenient way to navigate the expense application faster, ultimately improving productivity, efficiency, and user satisfaction.

NOTE: This feature will currently be available in English only.

End-User Experience

On selective Expense screens such as **Expense Home**, **Report Page**, and **Expense Entry Page**, press **SHIFT + /** to view the available shortcuts and to toggle the keyboard shortcuts ON or OFF.





Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Travel Allowance

New Features: Create a New Rate Bundle from a Statutory Base Rate Bundle and Enhanced Preview Mode

Overview

In March, two new features were released for clients using Travel Allowance. These features will be useful for clients who will be transitioning from the Legacy to the Service version of Travel Allowance.

Create a New Rate Bundle from a Statutory Base Rate Bundle

In March, a new feature for Travel Allowance Service (TAS) supports an option to create a new rate bundle from an existing statutory base rate bundle. This allows a client to change calculation rules while rates remain read-only, assign a user to the bundle, and test it.

Add Rate Bundle

Save

Important: ALWAYS use the SAP Concur-managed statutory rate bundle for supported countries to benefit from automated rate updates. Only deviating rates or rules should be added in a client rate bundle and assigned to the configuration together with the statutory bundle.

Rate Bundle Code *

CLIENT_SAP_CONCUR_DE

Description *

Statutory rates, Germany (Client)

Country/Region ? *

Germany

Base Bundle Code ?

Statutory rates, Germany

Testing can include changing the default Calculation Rules while still benefiting from automatic rate updates for the new bundle. For example, updating the default for **Day of exchange rate** to allow the default to be switched to first day of the itinerary, last day of the itinerary, or the start/end date of the expense report header. Or update the default **Reimbursement interval** to either Calendar Day or 24-hour interval.

Rate Bundles

Add

Upload

(Client)

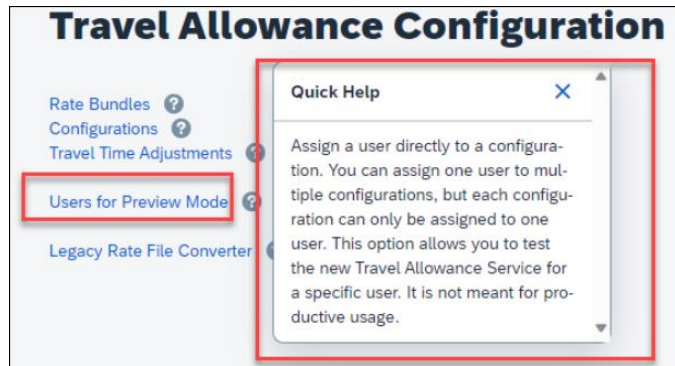
Rate Bundle↑	Location↓↑	Managed By↓↑	Actions
CLIENT_SAP_CONCUR_DE - Statutory rates, Germany (Client)	Germany	SAP Concur / Company	
CLIENT_SAP_CONCUR_PL - Statutory rates, Poland (Client)	Poland	SAP Concur / Company	

Note that, once created, the new rate bundle will display under **Managed By** as **SAP Concur / Company**.

Enhanced Preview Mode for Travel Allowance Service

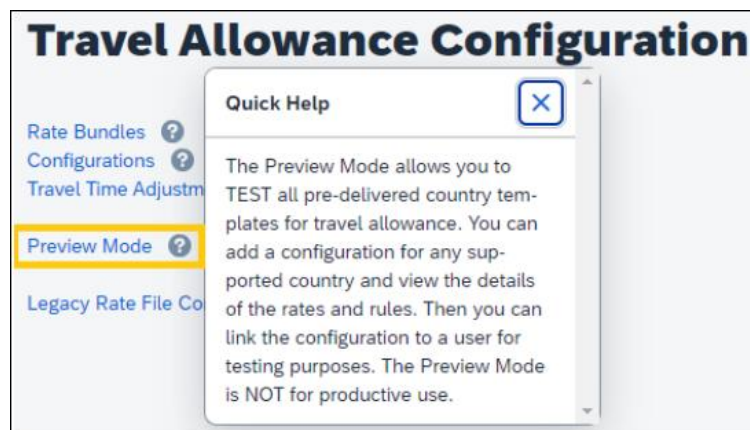
In October of 2023 the *Users for Preview Mode* feature was released. This feature allows the Legacy client without access to a Production Sandbox environment to test

the Travel Allowance Service (TAS) prior to transition. This is done by selecting the **Users for Preview Mode** option in **Travel Allowance Configuration**.

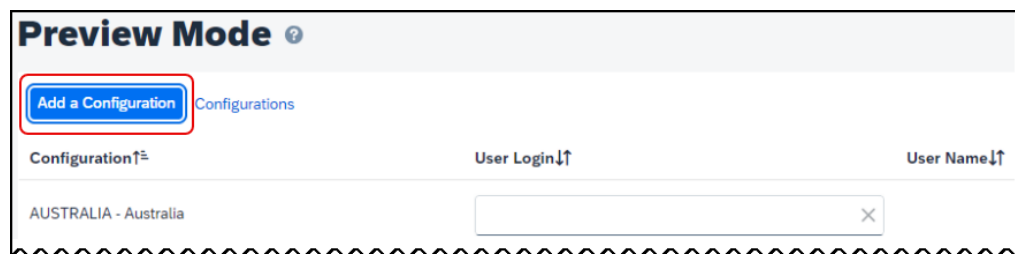


With the March 2024 release, several updates were made available to this feature:

- **Preview Mode in Menu:** The **Users for Preview Mode** menu is changed to **Preview Mode** and updated Quick Help text is included:



- **Add Configuration:** The **Preview Mode** page now displays the **Add a Configuration** button for the Expense Administrator (Restricted) role:



When adding the new configuration, the administrator may update only a restricted set of fields and may select only those rate bundles that are

marked under **Managed By** as *SAP Concur / Company*.

Add Configuration

Configuration Code ? *

Description *

Statutory Rate Bundle ? *

Client Rate Bundle ?

☐ Validate overlapping expenses on submit ?

Allowances as Fixed Amounts or Limits

Rate Category "Meal" ?

Daily Allowance

Rate Category "Lodging" ?

Daily Allowance

Rate Category "Incidental" ?

Daily Allowance

☐ Default hotel room tax for foreign travel only ?

Combine Rate Categories ?

None

Over Limit Distribution Method ?

None

Configuration / Feature Activation

These features are automatically available; however, they can be configured by the Travel Allowance Configuration administrator or SAP Concur personnel as required.

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Company Card

****Planned Changes** Enhancements to the Manage Transactions Screen**

Information First Published	Information Last Modified	Feature Target Release Date
March 2024	--	Late May, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

In late May, enhancements to the **Manage Transactions** screen will be available to the Company Card administrator for evaluation. These changes will be visible by default and the administrator may work with the new user interface and then decide to revert to the earlier version or continue with the newer version which will become the default user interface in an upcoming release.

NOTE: More feature information will be available in an upcoming release note.

This feature improves the company card experience by automatically displaying search results from the previous 30 days with the ability to perform a more complex search that displays hidden, visible, duplicate, and expensed transactions in a column order view familiar to administrators working in a financial statement format.

Administrator Experience

The Company Card administrator will see the simple search format of employee transactions of the previous 30 days. Transactions that are both hidden and visible to

employees (including transactions that are already on an expense report) will be returned.

Date	Status	Last 4 Digits of Card	Assignee Name
02/15/2024	Visible to Employee Assigned to a Report	1359	D08 CRTester
02/15/2024	Hidden for Employee Potential Duplicate	1358	D08 CRTester
02/15/2024	Hidden for Employee Posted Prior to Assignment Date	1358	D08 CRTester
02/15/2024	Hidden for Employee Potential Duplicate	1358	D08 CRTester
02/15/2024	Hidden for Employee Posted Prior to Assignment Date	1358	D08 CRTester
02/15/2024	Hidden for Employee Potential Duplicate	1358	D08 CRTester

From this simple format, the administrator clicks **Open Filters** to refine the search:

The **Last 4 Digits...** search now combines the logic for *all* the potential typed values:

All **Search In** selections are now combined so that *any* typed value will return a result.

Duplicate transactions are displayed using the **Potential Duplicate** attribute, and the informational window includes a link to release the transaction to the employee:

Transactions both already assigned to a report or posted prior to assignment date are clearly marked. For some status types, hovering a cursor opens an informational window describing the condition, action, and links to take action as needed:

Date	Status	Last 4 Digits of Card	Assignee Name
02/15/2024	Visible to Employee Assigned to a Report		
02/15/2024	Hidden for Employee Potential Duplicate		
02/15/2024	Hidden for Employee Posted Prior to Assignment Date		
02/15/2024	Hidden for Employee Potential Duplicate		
02/15/2024	Hidden for Employee Posted Prior to Assignment Date		
02/15/2024	Hidden for Employee Posted Prior to Assignment Date		
02/15/2024	Hidden for Employee Potential Duplicate		
02/15/2024	Hidden for Employee Posted Prior to Assignment Date		

Transaction Hidden

Posted Prior to Assignment Date

This transaction has been hidden because it is posted prior to card assignment date minus transaction release period.

Releasing this transaction will make it visible to the user for addition to an expense report.

Release this transaction

Card assignment date: 02/29/2024

Currently configured transaction release period: 5 (days)

Modify Transaction Release Setting

Please note: Existing transactions imported prior to modifying this setting will need to be manually released.

Moving Between the Two Manage Transactions Windows

In the figures above both the **Manage Transactions** and **Preview Manage Transactions** tabs are shown for clarity. Only a *single* tab will be displayed for the benefit of the administrator, who may move from the new user interface to the original interface using the **Revert to prior experience** link.



Configuration / Feature Activation

The change to the new user interface is visible by default and the administrator may revert to the original interface as needed. Note the new interface will display at any time the administrator moves from the screen and back again in a single session.

Receipts – ExpenseIt for Web

****Planned Changes** Single Combined Option to Select ExpenseIt for Email and Web Now Two Separate Options**

Information First Published	Information Last Modified	Feature Target Release Date
April, 2024	--	May, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

In May, users of ExpenseIt will have two separate options that let them control how ExpenseIt works for email and on the internet. With this change, an ExpenseIt user may open their expense preferences through their Profile Settings and work with the following options:

- Use ExpenseIt to create expenses from uploaded receipts on the web
- User ExpenseIt to create expenses from receipts mailed to receipts@concur.com

DEFAULT BEHAVIOR FOR NEW AND EXISTING USERS

Existing users who disabled the single, combined control will see both new, separate options disabled. New users will always see both options enabled by default.

Configuration / Feature Activation

No end-user action is required: ExpenseIt is automatically enabled the week of January 15, 2024, for all end-users on entities that have purchased ExpenseIt.

Reports

****Planned Changes** Enhancements to the Report Timeline**

Information First Published	Information Last Modified	Feature Target Release Date
April 12, 2024	--	April 23, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

The user interface for the **Report Timeline** feature in an expense report will be enhanced and will display updated icons and layout. Some additional details will also display when compared to what is currently displayed.

This feature will provide users with improved usability and will ensure report timeline user interface is easily accessible.

PHASES

This feature will be released to specific verticals, vendors, and data centers in April 2024:

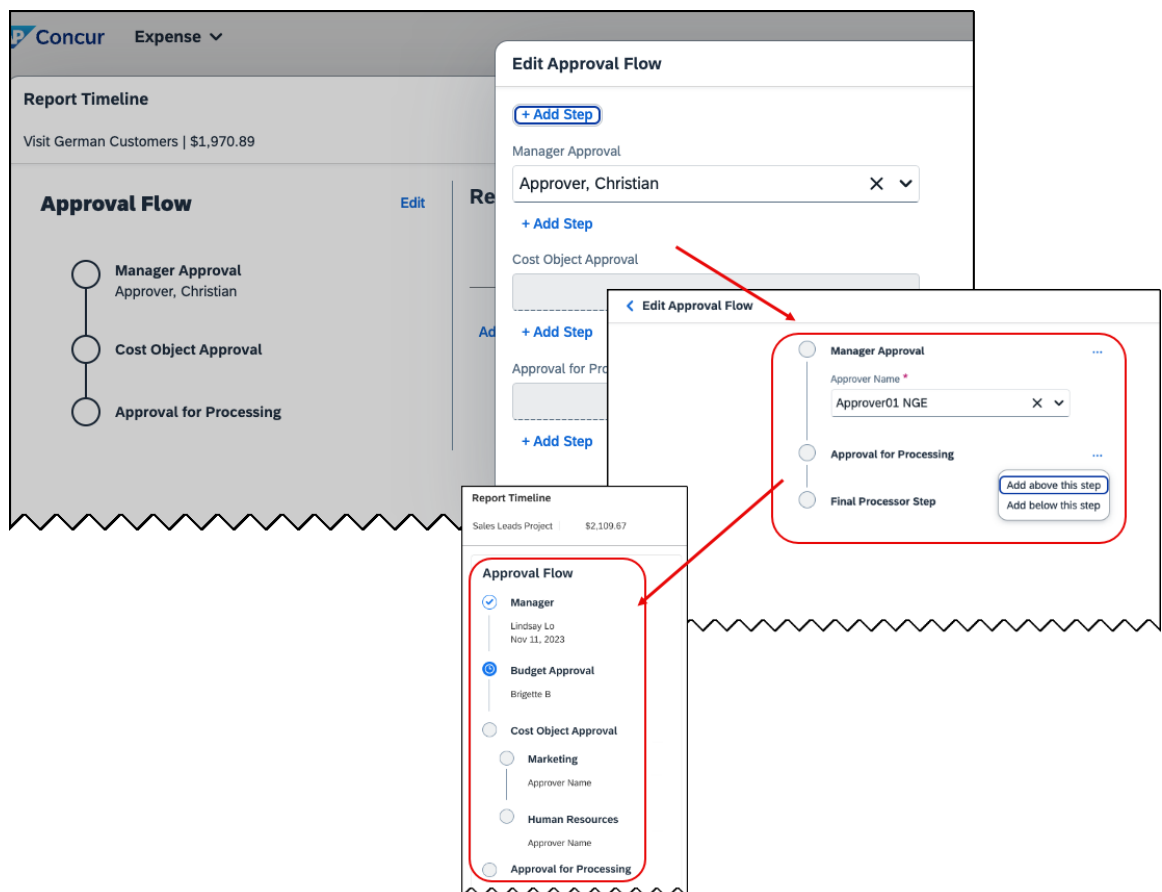
Phase	Date of Release
Phase 1: All customer test entities	April 16, 2024
Phase 2: All production entities	April 23, 2024

End-User Experience

Open an expense report and click **Report Details > Report Timeline** to see the new enhancements in the **Report Timeline** screen. You will see more information than was previously available, along with the status of the report and names of the approvers.

In the **Approval Workflow** section, the UI will be improved to display updated icons, approver names along with time and date of approval.

Example:



The view in the **Report Summary** section will also be enhanced to show updated icons and layout. New buttons **Sort** and **Filter** will be included in the UI. The comment section will no longer be hidden and will now display to all.

Example:

The screenshot displays the 'Report Summary' section of the Concur Expense system. It features an 'Approval Flow' on the left with steps: Manager Approval (Approver: Christian), User-Added Approver, Approval for Processing, and Final Processor Step. The main 'Report Summary' area shows the date 'Thursday, 4 April, 2024' and the status 'Submitted' (Updated: Apr 4, 2024 7:48 PM). Below this, there is an 'Itemization Comment - Parking - Aug 4, 2023 - € 60.00' and a 'Report Comment - \$1,838.45'. The right sidebar lists various report items including 'ITEMIZATION COMMENT', 'SUBMITTED', 'SUBMITTED & PENDING APPROVAL', and 'APPROVED'.

Configuration / Feature Activation

These changes will be automatically available; there are no configuration or activation steps.

Planned Changes Preferred Name for Expense Submitter

Information First Published	Information Last Modified	Feature Target Release Date
March 15, 2024	April 12, 2024	Q2, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for the second quarter of 2024, Concur Expense will support preferred names for users submitting expenses. The users will be able to view the preferred name that has been setup for approvers, company attendees, and other elements that display a name field, if the preferred name has been configured for the user.

Today, in Concur Expense, users can set a preferred name for themselves. In the second quarter of 2024, Concur will display the preferred name for approvers, company attendees, and other names that an expense submitter will see in the system.

For example, if a user with expense approver permissions has specified a preferred name, this preferred name will display to users submitting expenses, when selecting an approver, or when viewing the timeline for an expense report.

Similarly, if another user in the same company has specified a preferred name in Concur Expense, an expense submitter will see the preferred name when searching for an attendee, and when the user has been added as an attendee to an expense.

This update will offer users the flexibility to set up their own preferred names at work, compared to using their given first names and improves user satisfaction.

End-User Experience

The user who is an expense submitter will see the preferred names that is configured for other employees that they interact with in the system, if their locale supports preferred name. This preferred name will appear in places where the users may have seen the given name of the employee previously.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

User Interface Changes

****Planned Changes** Update to the Report Status Indicator**

Information First Published	Information Last Modified	Feature Target Release Date
April 12, 2024	--	April 23, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Currently, end users can view the updated rectangular indicator that shows the status of an expense report. This indicator, at present, displays in bold colors. Targeted for April 23rd, 2024, this rectangular indicator will be further enhanced to display in more pleasing, mild colors.

With this change, this indicator will be easier on the eyes than the prior version.

End-User Experience

The end-user can now see, in selected screens, a solid color background and white text in the tiles that display the status of the expense report.

Configuration / Feature Activation

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

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

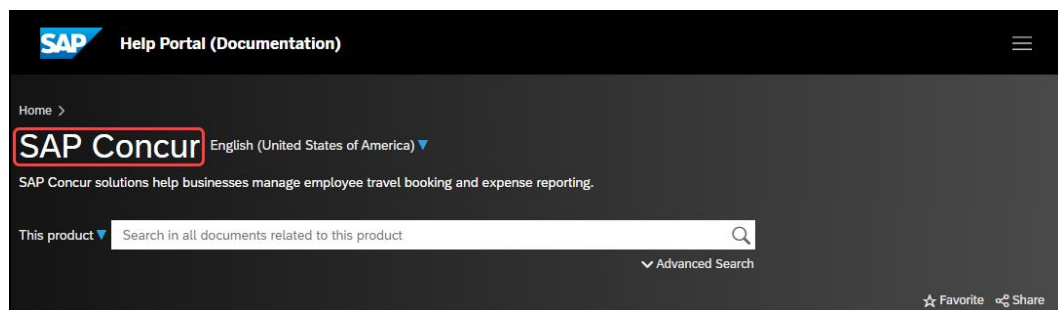
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

► ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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SAP Concur Release Notes Concur Expense Professional / Premium	
Month	Audience
Release Date: May 2024 Initial Post: May 17, 2024	Client FINAL

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Release Notes

This document contains the release notes for Concur Expense professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Expense Pay

Updates to Worldline Onboarding Application Screen

Overview

As of May 18th, 2024, the Worldline funding account onboarding application form is improved to make the instructions more detailed for the different sections.

This update is intended to make the application form more self-serve, thereby facilitating the setting up of expense pay in a reduced time frame. This also helps the clients stay informed about the requirements.

Administrator Experience

The **Partner Onboarding Application** form contains multiple changes.

In the **Authorized Signer/Owner Details** section, more detailed instructions display. The five **Director** tabs is renamed to **Authorized Signer**. Except the first tab, the rest displays that it is optional.

The screenshot shows the 'Funding Account' form with the 'Account Information' tab selected. The 'Business Address' section includes fields for Address Line 1, Address Line 2, City, Province, and Postcode. Below this is the 'Authorized Signer / Owner Details' section, which contains a red-bordered box with updated instructions: 'To expedite the approval and processing of your application, please provide information for at least one authorized signer from your organization. Additionally, include details for any other authorized signers who hold 20% or more ownership in your organization.' Below the instructions are five tabs: 'Authorized Signer', 'Authorized Signer (Optional)', 'Authorized Signer (Optional)', 'Authorized Signer (Optional)', and 'Authorized Signer (Optional)'. A red box highlights the updated tab labels. Below the tabs are fields for First Name, Last Name, Date of Birth, % for Company, and Date Current Ownership. A red box highlights the updated tab labels for the 'Authorized Signer' tab.

In the **Files required to complete onboarding activity for Application** section, the text is updated to include information about the ID requirement to help explain why it is needed and what it is used for.

The spacing for the **Select a document to upload fields** is improved to display the **Browse** button clearly. The text instructing the users to send an email is moved to

the bottom of the screen, along with an updated email address which is hyperlinked directly in the application form.

Funding Account

Account Information

Partner Onboarding Application ID 725572

Updated text

Save

Files required to complete onboarding activity for Application ID - 725572

Please upload the documents below as applicable. For the photo ID requirement, we need one person from your organization to apply and serve as the "point of contact" for the account. Therefore, we ask for your ID, name, and other identifying information below. While the organization is technically applying for the account, the Worldline/Bambora team verifies your personal information and ID to confirm your identity and that you are a real person applying.

Copy ID (Owner and/or Principal) - government issued photo ID:	Select a document to upload	Browse...	Enter description of the document.	Upload
Bank Statement:	Select a document to upload	Browse...	Enter description of the document.	Upload
Bank Reference Letter (Download):	Select a document to upload	Browse...	Enter description of the document.	Upload
Business Registration Documents (i.e. certificate of incorporation, non-profit registration, etc.):	Select a document to upload	Browse...	Enter description of the document.	Upload
List of Board Members (public and NFP companies):	Select a document to upload	Browse...	Enter description of the document.	Upload

Save

Terms and Conditions: Before you can agree to the terms and conditions, please fill out all the required fields, upload all required documents, and save your application.

Click here to view [Terms and Conditions](#)

☐ By checking this box, I represent that I have fully read the agreement, accept it as the terms and conditions of my application, and agree to accept this Agreement on behalf of the organisation or entity listed above. I agree that my electronic acceptance of this Agreement shall have the same force and effect as if I had Physically signed it.

Content is moved to the bottom. Direct hyper-link to email.

represent that I am over 18 years of age. I agree to accept this Agreement on behalf of the organisation or entity listed above. I agree that my electronic acceptance of this Agreement shall have the same force and effect as if I had Physically signed it.

First Name of person accepting

Last Name of person accepting

Email of person accepting

Phone number of person accepting

Once you have submitted your application, please send an email to applications.na@worldline.com that you completed your account setup and indicate your application ID: 725572.

Send for Review

Close

When mandates are required, extra instructions are included for the users.

The screenshot shows a web form for accepting terms and conditions. At the top right is a blue 'Save' button. Below it, the text reads: 'Terms and Conditions: Before you can agree to the terms and conditions, please fill out all the required fields, upload all required documents, and save your application.' A link 'Click here to view Terms and Conditions' is provided. The main section contains a checkbox and the text: 'By checking this box, I represent that I have fully read the agreement, accept it and agree to be bound by its terms. I represent that I am over 18 years of age. If this Agreement is being entered into by an organisation or entity, I agree that I am authorised to accept this Agreement on behalf of the organisation or entity listed above. I agree that my electronic acceptance of this Agreement shall have the same force and effect as if I had Physically signed it.' Below this are input fields for 'First Name of person accepting', 'Last Name of person accepting', and 'Phone number of person accepting'. A red box highlights the text 'With mandate required (GBP, EUR) extra instructions are included' with a red arrow pointing to the 'Last Name' field. At the bottom, a red-bordered box contains the text: 'Once you have submitted your application, please send an email to applications.na@worldline.com that you completed your account setup and indicate your application ID: 725572. When Worldline/Bambora completes the required setup steps and files the mandate to your bank, you will receive a copy of your mandate which will contain Mandate Reference ID. Please retain it for your records.'

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Receipts – ExpenseIt for Web

Single Combined Option to Select ExpenseIt for Email and Web Now Two Separate Options

Overview

Users of ExpenseIt now have two separate options that let them control how ExpenseIt works for email and on the internet. With this change, an ExpenseIt user may open their expense preferences through their **Profile Settings** and work with the following options:

- Use ExpenseIt to create expenses from uploaded receipts on the web
- User ExpenseIt to create expenses from receipts mailed to receipts@concur.com

DEFAULT BEHAVIOR FOR NEW AND EXISTING USERS

Existing users who previously disabled the single, combined control will see both new, separate options disabled. New users will always see both options enabled by default.

End-User Experience

Open your **Profile Settings** and select **Expense Preferences** from the **Expense Settings** section.

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: None

- ☒ Use Expenselt to create expenses from u

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 Trip

- ☒ Use Expenselt to create expenses from uploaded receipts on the web
- ☒ Use Expenselt to create expenses from receipts emailed to receipts@concur.com

Configuration / Feature Activation

The change occurs automatically, there are no additional configuration steps.

Reports

Enhancements to the Report Timeline

Overview

The user interface for the **Report Timeline** feature in an expense report is enhanced and displays updated icons and layout. Some additional details display when compared to what was previously displayed.

This feature provides users with improved usability and ensures report timeline user interface is easily accessible.

PHASES

This feature was released to specific verticals, vendors, and data centers in April 2024:

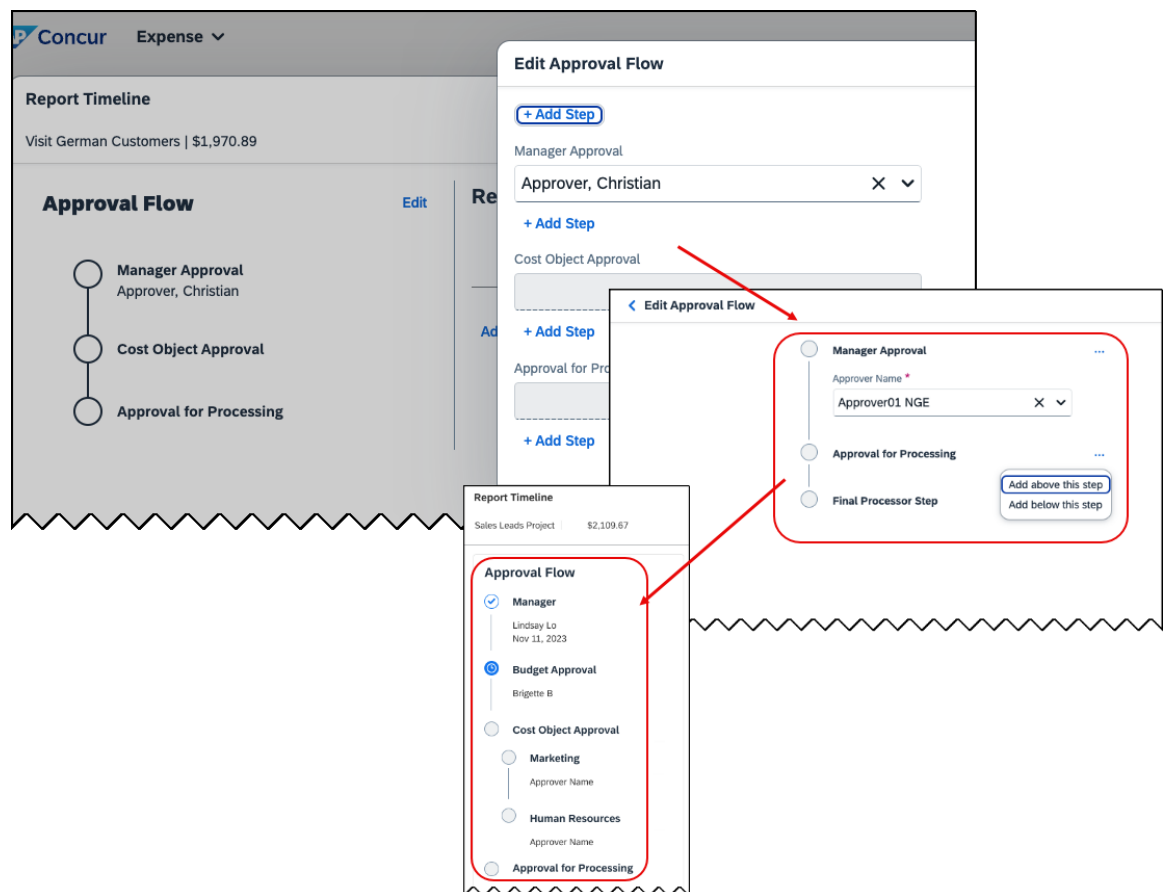
Phase	Date of Release
Phase 1: All customer test entities	April 16, 2024
Phase 2: All production entities	April 23, 2024

End-User Experience

Open an expense report and click **Report Details > Report Timeline** to see the new enhancements in the **Report Timeline** screen. You can see more information than was previously available, along with the status of the report and names of the approvers.

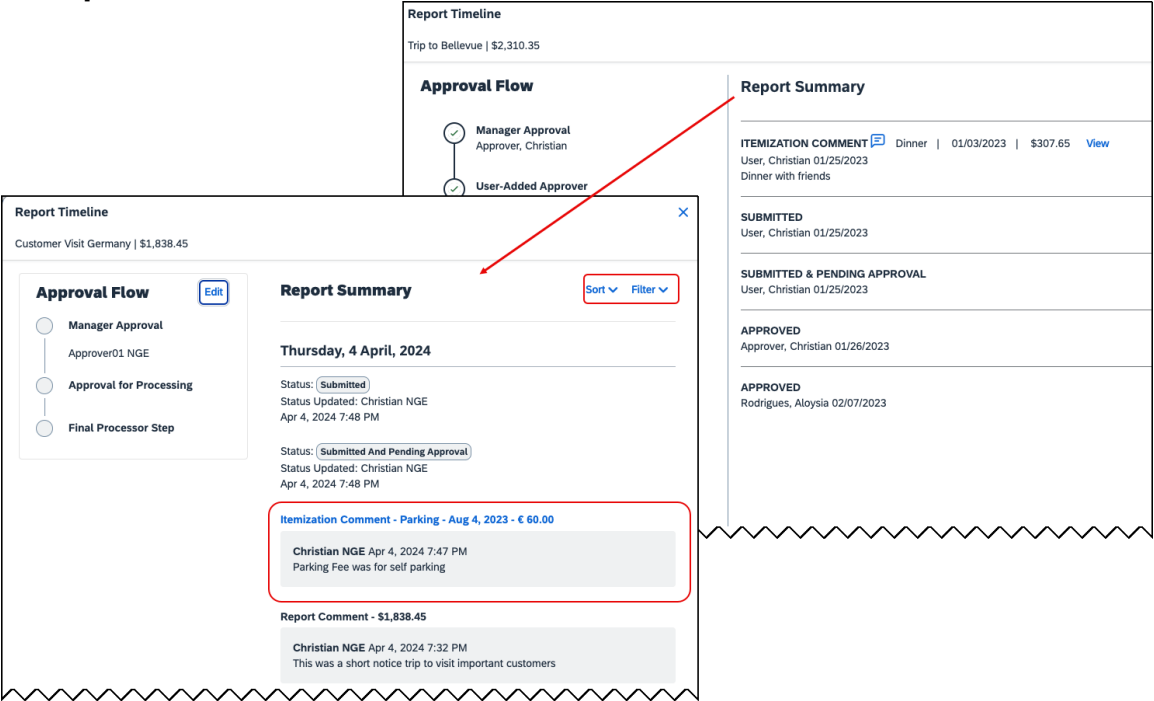
In the **Approval Workflow** section, the UI is improved to display updated icons, approver names along with time and date of approval.

Example:



The view in the **Report Summary** section is enhanced to show updated icons and layout. New buttons **Sort** and **Filter** are included in the UI. The comment section is no longer hidden and now displays to all.

Example:



Configuration / Feature Activation

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

Travel Allowance

New Fields in Rate Bundle Upload and Download Template

Overview

The rate bundle upload and download templates were enhanced with multiple new fields. This change affects administrators who have their own custom rate bundle templates to upload rates.

Administrators can either copy their data into the new template or modify their custom templates to add the new fields.

Administrator Experience

The enhanced rate bundle upload template is available for download in **Administration > Expense > Travel Allowance Configuration > Rate Bundles**

screen. Select a bundle row and click the **View Contents** icon. Use the **Download** button to get the latest templates. The new templates are available for **Rates**, **Deductions**, and **Adjustments**.

The download file for **Rates** is enhanced by the following fields:

- Overlap Type Code
- Overlap Trip Identifier
- Overlap Trip Applicable For
- Overlap Trip Destination

	A	B	C	D	E	F	G	H	I	J	K	L
	Rate	Trip	Meal	Lodging	Overlap	Overlap	Overlap	Overlap	Location	Location -	Location	
	Type *	Type	Type	Type	Type	Identifier	Applicable For	Destination	Country	- Sub	Administrative	UN
1	Type *	Type	Type	Type	Code				SO	Division	Region	Location
2	LODGING					NONE	NONE	NONE				
3						NONE	NONE					
4						NONE	NONE					

The default value for these columns, except for overlap type code, is 'NONE'.

The download file for **Deductions** is enhanced by the following fields:

- First Additional Deduction Category
- First Additional Deduction Type
- Second Additional Deduction Category
- Second Additional Deduction Type

	F	G	H	I	J	K	L	M	N	O	P	Q	R
	Location	Location				First	First	Second	Second				
	- Sub	Administrative	UN	Deduction	Deduction	Additional	Additional	Additional	Additional		From	To	From
	Division	Region	Code	Category	Type	Deduction	Deduction	Deduction	Deduction	Applicable	Number	Number	Number
	Code			Code *	Code *	Category	Type	Category	Type	for *	of Days	of Days	of Minutes
				ACTUAL_E PROVIDED						ALL_DAYS			
				ACTUAL_E PROVIDED						ALL_DAYS			

The default value for these fields is 'Blank'.

The download file for **Adjustments** is enhanced by the following fields:

- Overlap Type Code
- Overlap Trip Identifier
- Overlap Trip Applicable For

- Overlap Trip Destination

	A	B	C	D	E	F	G	H	I	J	K
					Overlap	Overlap	Overlap	Overlap	Location		Location
	Rate	Trip	Meal	Lodging	Type	Trip	Trip	Trip	-	Location	-
	Type *	Type	Type	Type	Type	Identifie	Applica	Destinat	Country	- Sub	Admini
1					Code	r	ble For	ion	ISO	Division	trative
2									Code	Code	Region
3											
4											
5											
6											
7											

The default value for these columns is 'NONE'.

Configuration / Feature Activation

These features are automatically available; however, they can be configured by the Travel Allowance Configuration administrator or SAP Concur personnel as required.

User Interface Changes

Update to the Report Status Indicator

Overview

Currently, end users can view the updated rectangular indicator that shows the status of an expense report. This indicator used to display in bold colors. Now, this rectangular indicator displays in more pleasing, mild colors.

With this change, this indicator is easier on the eyes than the prior version.

End-User Experience

The end-user can now see, in selected screens, a solid color background and white text in the tiles that display the status of the expense report.

Configuration / Feature Activation

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

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Cards

****Planned Changes** Retention Period of Credit Card Data Files**

Information First Published	Information Last Modified	Feature Target Release Date
March 15, 2024	--	May 24, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted on or before May 24, SAP Concur will be implementing a process for compliance reasons, where the card data files received from external sources (issuing banks, card associations) will be deleted from the system after 90 days.

Normally, the practice is to automatically import and load the data contained in the data files within 24 hours of receipt. If the raw data is required after the 90-day window, clients can work with their issuing bank to have these files re-sent.

This update is meant for offering data protection and privacy compliance.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Company Card

Planned Changes Enhancements to the Manage Transactions Screen

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	--	May 23, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Enhancements to the **Manage Transactions** screen will be available to the Company Card administrator. These changes will be visible by default and the administrator will be able to work with the new user interface and then decide to revert to the earlier version or continue with the newer version which will become the default user interface in an upcoming release.

With this change, administrators will be able to easily view transactions based on flexible search criteria, including transactions assigned to expense reports. The new feature will return search results from the previous 30 days with the ability to perform a more complex search that displays hidden, visible, duplicate, and expensed transactions in a column order view familiar to administrators working in a financial statement format.

Administrator Experience

Upon first opening of the screen, the Company Card administrator will see the simple search format of employee transactions automatically filtered for the previous 30 days. Transactions that are both hidden and visible to employees (including transactions that are already on an expense report) will be returned.

Company Card

Manage Card Programs

Manage Accounts

Manage Transactions

Manage Lodge Transactions

Merchant Code Mapping

Settings

View Import Logs

Check CR Account

Manage CAV Transactions

Mass Transaction Change

Change Accounts

Some transactions may not be in the system yet. It can take up to 14 days for a bank to post a charge and for it to appear in Concur. [Learn more](#)

Switch to old experience

Start Date * 04/03/2024

End Date * 05/03/2024

Last 4 Digits of Card, Name on Card or Employee ID

Amount (Minimum)

Amount (Maximum)

Search

Open Filters

Release to Employee

Hide for Employee

Assign Card

Show/Hide Columns

	Date	Status	Last 4 Digits of Card	Assignee Name	Merchant/Vendor	Amount	Actions
☐	12/20/2023	Card Not Assigned	8888	Not Assigned	ABC	301.01 USD	View Details
☐	12/20/2023	Hidden for Employee Potential Duplicate	8888	Traveller Everywhere	ABC	301.01 USD	View Details
☐	12/20/2023	Hidden for Employee Potential Duplicate	8888	Traveller Everywhere	ABC	301.01 USD	View Details
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details

From this simple format, the administrator clicks **Open Filters** to refine the search:

The search will combine the logic for multiple possible search elements:

Duplicate transactions will be displayed using the **Potential Duplicate** attribute, and the informational window will include a link to release the transaction to the employee:

☐	Date	Status	Last 4 Digits of Card	Assignee Name
☐	12/20/2023	Card Not Assigned		
☐	12/20/2023	Hidden for Employee Potential Duplicate		
☐	12/20/2023	Hidden for Employee Potential Duplicate		
☐	12/20/2023	Visible to Employee Unassigned to a Report		
☐	12/20/2023	Visible to Employee Unassigned to a Report		
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere

Transaction Hidden

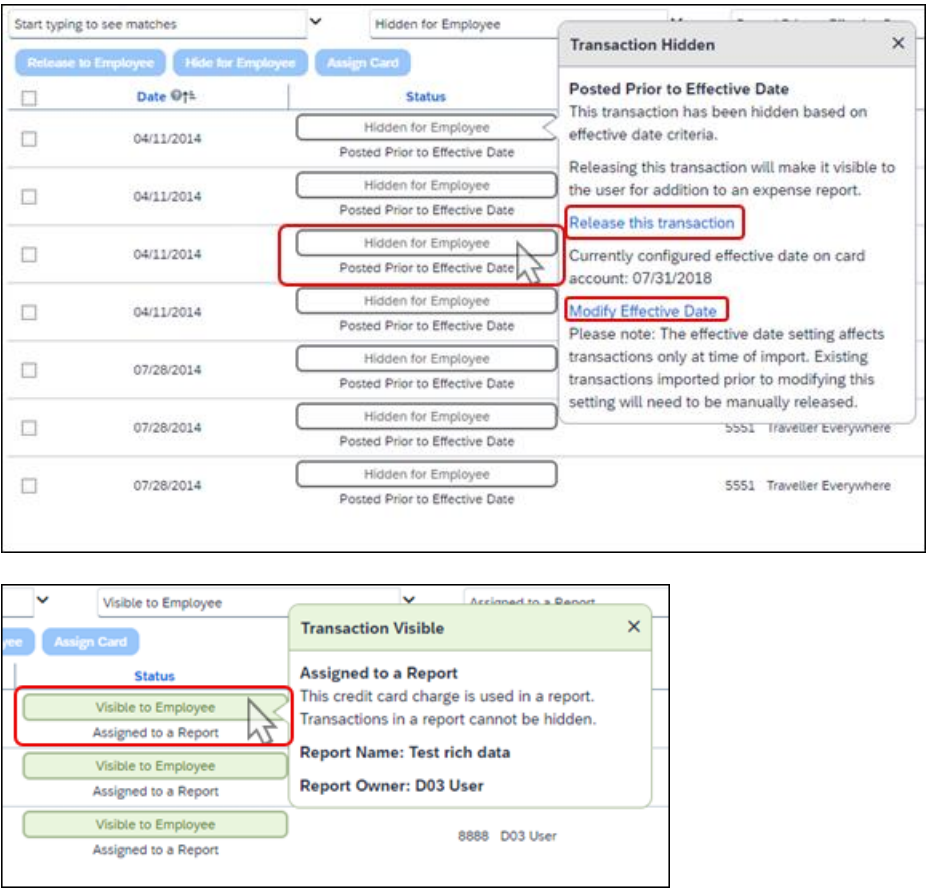
Potential Duplicate

There is already a transaction in Concur with similar attributes. Therefore, this transaction was identified by our system as a duplicate during import and hidden. Releasing this transaction will make it visible to the user for addition to an expense report.

[Release this transaction](#)

Transactions both already assigned to a report or posted prior to assignment date will be clearly marked. Hovering with the mouse on the status will open an

informational window describing the condition, action, and links to take action as needed:



Configuration / Feature Activation

The change to the new user interface will be visible by default and the administrator will be able to revert to the original interface as needed. Note the new interface will display at any time the administrator moves from the screen and back again in a single session.

Expense

****Planned Changes** Expense Integration with Microsoft Teams**

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	--	Q3 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for a future release, Concur Expense will integrate with Microsoft (MS) Teams. This integration will allow users to collaborate on Concur Expense tasks without leaving MS Teams.

End-User Experience

Once MS Teams is enabled for an organization, the SAP Concur app can be added to the user's MS Teams. Once within the SAP Concur app within MS Teams, the user can type search terms such as "Expense" or "Expense Approvals" to retrieve entire reports. A list with the latest five active reports will appear.

Expense reports will be available to view in MS Teams or to be shared with an approver in a chat.

Approvers will be able to search expense reports from their approval queue. A list with the latest five active reports will appear. Approvers will be able to approve or reject reports from within MS Teams.

Configuration / Feature Activation

This feature is enabled by default. There are no configuration steps.

Expense Pay

****Planned Changes** (Canada) Changes for Bank Information**

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	May 17, 2024	May 23, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Currently, the Province field in the user banking screen for Canada allows free-form text for the user to enter the full name of the Province or enter the two-digit Province ID.

As of May 23rd, 2024, for users receiving Expense Pay reimbursements in Canadian Dollars (CAD), the **Province** field will be updated to a dropdown list and the users will have to select from a list of valid Canadian provinces. In the future, users who enter or *update* their **Bank Information** page in Profile will need to select a province from the dropdown list they have entered something other than a valid province code in their province field previously.

Existing users will still get reimbursed even if they do not have a valid province selection saved in their user banking information. This change will be applicable to first time users and for anyone who will update their bank information in the future, so the data becomes standardized over time.

This standardization is being done now due to a requirement change from our payment providers and for consistency of data.

End-User Experience

For Canadian users, the field **Province** that displays on the **Banking Information** page in Profile (**Profile > Profile Settings > Bank Information**) will be updated to a dropdown list. Users will be asked to make a valid selection in the **Province** field to be able to save or update their banking.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Itemizations

****Planned Changes** Recurring Itemizations in Expenses**

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	--	Early June, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

In an upcoming release, the multiple itemization recurrence options in Concur Expense will be combined into a single, user-friendly drop-down menu, from which the user can select the recurrence frequency.

This change is applicable to all expense types where there is a possibility for recurrence of itemizations.

For example, when the user has entered all details pertaining to the hotel, the user will need to itemize their hotel expenses. The user will now see this user friendly drop-down within the nightly lodging wizard for hotel expenses.

This feature will allow the user to create multiple expense entries during the itemization process, as well as provide the same amount per day, or different amounts each day.

This change will make the recurrence checkbox more discoverable and will reduce complexity in creating itemization for expenses. The users will be able to efficiently manage their itemized expenses in a shorter time with a better streamlined process.

End-User Experience

On the **Itemizations** tab in Concur Expense, the field **Entry Type > Recurring Itemization** will be replaced with a new **Recurrence** drop-down list. After the **Expense Type** is selected, such as **Hotel**, the user will now choose an option from the **Recurrence** drop-down list.

This change applies to all expense types where there is a **Recurrence** checkbox.

Hotel \$500.00
01/17/2024 | Allstar Hotels

Details | **Itemizations**

Amount \$500.00 | Itemized \$0.00 | Remaining \$500.00

New Itemization

Expense Type *
Hotel

Entry Type:
Recurring Itemization (Nights: 11)

Your hotel room rate was:

The Same Every Night | Not the Same

Room Rate (per night)* | Room Tax (per night) | Tax 2 (per night) | Tax 3 (per night)

(Amounts in USD) [Add Tax Fields](#)

[Save Itemization](#) [Save and Add Another](#) [Cancel](#)

Recurrence *
Choose recurrence
Not recurring
Same daily amount
Different daily amount

New Screen

For the **Hotel** expense type, the current UI contains the options **The Same Every Night** and **Not the Same**. This will be updated to display the selections **Same Daily Amount** and **Different Daily Amount** as follows:

Example: Same Daily Amount Screen

DetailsItemizations

Total Amount602.50 USDItemized550.00 USDRemaining52.50 USD

New Itemization

Allocate

Required Field

Expense Type *

Hotel

Recurrence *

Same daily amount

Nights: 2

Date	Room Rate *	Room Tax
11/11/2024	250.00	25.00
11/12/2024	250.00	25.00

Add Tax Fields

Business Purpose

Vendor *Tree Plaza Hotel

☐ Personal Expense (do not reimburse)

Example: Same Daily Amount Screen

DetailsItemizations

Amount\$33.00Itemized\$60.00Over\$27.00

New Itemization

Required field

Expense Types *

Hotel

Recurrence *

Different daily amount

Nights: 2

Date	Room Rate *	Room Tax	Tax 2	Tax 3
04/18/2024				
04/19/2024				

(Amounts in USD)Add Tax Fields

☐ Combine room rate and taxes into a single entry

Save Itemization

Save and Add Another

Cancel

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Reports****Planned Changes** Preferred Name for Expense Submitter**

Information First Published	Information Last Modified	Feature Target Release Date
March 15, 2024	May 17, 2024	May 27-28, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for May 27-28, 2024, Concur Expense will support preferred names for users submitting expenses. The users will be able to view the preferred name that has been setup for approvers, company attendees, and other elements that display a name field, if the preferred name has been configured for the user.

Today, in Concur Expense, users can set a preferred name for themselves. After May 27 – 28, 2024, Concur will display the preferred name of approvers, company attendees, and other names that an expense submitter will see in the system.

For example, if a user with expense approver permissions has specified a preferred name, this preferred name will display to users submitting expenses, when selecting an approver, or when viewing the timeline for an expense report.

Similarly, if another user in the same company has specified a preferred name in Concur Expense, an expense submitter will see the preferred name when searching for an attendee, and when the user has been added as an attendee to an expense.

This update will offer users the flexibility to set up their own preferred names at work, compared to using their given first names and improves user satisfaction.

End-User Experience

The user who is an expense submitter will see the preferred names that is configured for other employees that they interact with in the system, if their locale supports preferred name. This preferred name will appear in places where the users may have seen the given name of the employee previously.

The following screens in Concur Expense will display the configured preferred name.

REPORT LIBRARY:

The approver's name will display when the report is pending approval or returned to submitter.

Home / Expense / Manage Expenses

Manage Expenses

Report Library

PREF_NAME 05/08/2024 \$260.00 Returned Sent Back (Returned) to Employee Aprov02 Pref NGE	XPR-51418 05/08/2024 \$35.00 Returned Sent Back (Returned) to Employee	Copy: bu 11/28/2023 \$1,745 Returned Sent Back (Returned) to Employee ADMINN nge
attendee test 07/12/2023 \$200.00 Returned	bug bash 07/12/2023 \$100.00 Returned	dev 04/17/2023 ¥1,200 Returned

REPORT PAGE:

The preferred name will display in multiple places inside the report:

- In the comments section for a returned report where the name of the person who adds a comment displays.

SAP Concur Expense ▾

Manage Expenses

Home / Expense / Manage Expenses / Monthly expenses

Report Comment PreferredName Nge: Please update the expenses indicated to the correct cost center and resubmit. Thank you. [View Report Timeline](#)

Monthly expenses \$15.00

- In the **Report Header**, where the report owner's name will display if the field is configured on the form
- Expense entries list

- Expense details

REPORT TIMELINE AND APPROVAL FLOW

- Name of the person who acted (workflow changes - submitted, approved, and so on)
- Name of the approver for a workflow step
- Approver search, if configured.

Report Timeline
PREF_NAME | \$260.00

Approval Flow [Edit](#)

```

graph TD
    A((Manager Approval  
Approver02 NGE)) --> B((test))
    B --> C((test1))
    C --> D((test3))
    D --> E((Approval for Processing))
  
```

Report Summary [Sort](#) [Filter](#)

Report Comment 0/500

Wednesday, May 8, 2024

Status: **Sent Back (Returned) to Employee**
 Status Updated: Aprov02 Pref NGE
 May 8, 2024 12:27 PM

Report Comment - \$260.00

Aprov02 Pref NGE May 8, 2024 12:27 PM
 Return this report

Status: Submitted
 Status Updated: PREF_JAY Han
 May 8, 2024 12:24 PM

Status: Submitted And Pending Approval
 Status Updated: PREF_JAY Han
 May 8, 2024 12:24 PM

Status: **Sent Back (Returned) to Employee**
 Status Updated: PREF_JAY Han
 May 8, 2024 12:23 PM

Status: Submitted
 Status Updated: PREF_JAY Han
 May 8, 2024 12:22 PM

Status: Submitted And Pending Approval
 Status Updated: PREF_JAY Han
 May 8, 2024 12:22 PM

[Expense Comment - Dinner - May 8, 2024 - \\$200.00](#)

AUDIT TRAIL

Audit trail will display the preferred name of the person who made the change.

ATTENDEES

The preferred name will display only for the system employee attendee type:

- In the list of attendees associated with the expense entry
- Search results

- Favorite and Groups
- Attendee detail

REPORT PAYMENTS

The preferred name of the report owner who received the payment.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.



For further updates related to this feature, visit the [Preferred Name Locale](#) topic in SAP Concur Developer Center.

Travel Allowance Service

****Planned Changes** Removal of Rate Type "Incidentals" for the Foreign Travels of Polish Employees**

Information First Published	Information Last Modified	Feature Target Release Date
May 2024	--	June 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

The Polish users of Travel Allowance Service will no longer see the rate type "incidentals" while creating an expense for their foreign trips. This change will be made by SAP Concur to stay compliant with the local statutory requirements.

Going forward, the employees will no longer see the split of the daily allowance between "meals" and "incidentals" while creating an expense for foreign trips. With the removal of the "incidentals" rate type, the employees will see only one rate type "meals", and the deductions for any provided meals will be calculated on this. However, the employees will remain entitled to receive at least 25% of the prorated daily allowance, despite deductions.

End-User Experience

The users will see only one rate type “meals” besides the “lodging” rate type. As a result, there will be only one expense entry for meals per day and fewer deviating reimbursement amounts due to rounding off.

Configuration / Feature Activation

For the statutory rate bundle, this feature is automatically available and there are no configuration or activation steps. For changes in the client rate bundle, raise a ticket to the Concur Services.



For more information, refer to the [Concur Expense: Travel Allowance Poland Statutory Bundle Setup Guide](#).

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

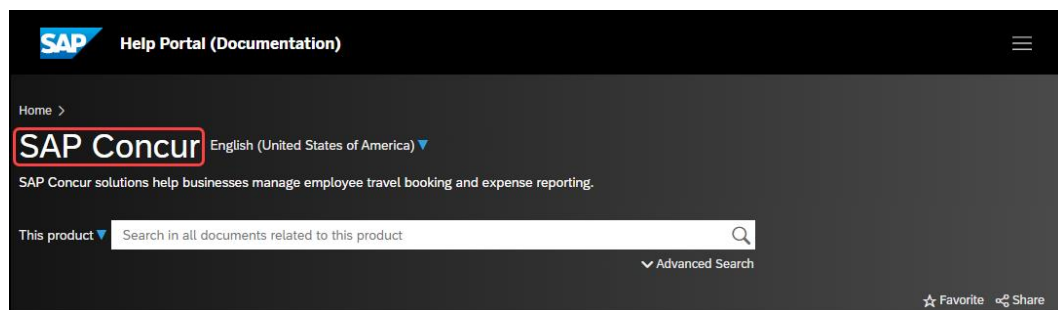
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

▶ ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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SAP Concur Release Notes Concur Expense Professional / Premium	
Month	Audience
Release Date: June 2024 Initial Post: June 21, 2024	Client FINAL

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Release Notes

This document contains the release notes for Concur Expense professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Cards

Retention Period of Credit Card Data Files

Overview

As of May 24, SAP Concur has implemented a process for compliance reasons, where the card data files received from external sources (issuing banks, card associations) is deleted from the system after 90 days.

Normally, the practice was to automatically import and load the data contained in the data files within 24 hours of receipt. If the raw data is now required after the 90-day window, clients can work with their issuing bank to have these files re-sent.

This update is meant for offering data protection and privacy compliance.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Company Card

Enhancements to the Manage Transactions Screen

Overview

Enhancements to the **Manage Transactions** screen are available to the Company Card administrator. These changes are visible by default and the administrator can work with the new user interface and then decide to revert to the earlier version or continue with the newer version which will become the default user interface in an upcoming release.

With this change, administrators can easily view transactions based on flexible search criteria, including transactions assigned to expense reports. The new feature returns search results from the previous 30 days with the ability to perform a more

complex search that displays hidden, visible, duplicate, and expensed transactions in a column order view familiar to administrators working in a financial statement format.

Administrator Experience

Upon first opening of the screen, the Company Card administrator can see the simple search format of employee transactions automatically filtered for the previous 30 days. Transactions that are both hidden and visible to employees (including transactions that are already on an expense report) are returned.

Company Card

Manage Card Programs | Manage Accounts | **Manage Transactions** | Manage Lodge Transactions | Merchant Code Mapping | Settings | View Import Logs | Check CR Account | Manage CAI Transactions | Mass Transaction Change | Change Accounts

Some transactions may not be in the system yet. It can take up to 14 days for a bank to post a charge and for it to appear in Concur. [Learn more](#)

Switch to old experience

Start Date * 04/03/2024 End Date * 05/03/2024 Last 4 Digits of Card, Name on Card or Employee ID Amount (Minimum) Amount (Maximum) Search Open Filters

Release to Employees Hide for Employee Assign Card Show/Hide Columns

Date	Status	Last 4 Digits of Card	Assignee Name	Merchant/Vendor	Amount	Actions
12/20/2023	Card Not Assigned	8888	Not Assigned	ABC	301.01 USD	View Details
12/20/2023	Hidden for Employee Potential Duplicate	8888	Traveller Everywhere	ABC	301.01 USD	View Details
12/20/2023	Hidden for Employee Potential Duplicate	8888	Traveller Everywhere	ABC	301.01 USD	View Details
12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details
12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details
12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details
12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details
12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere	ABC	301.01 USD	View Details

From this simple format, the administrator clicks **Open Filters** to refine the search:

Start Date * 02/03/2024 End Date * 03/04/2024 Last 4 Digits of Card, Name on Card or Employee ID 1234 Amount (Minimum) Amount (Maximum)

Merchant/Vendor Status All Sub-Status Potential Duplicate Search Close Filters

The search combines the logic for multiple possible search elements:

Manage Accounts | Manage Transactions | **Merchant Code Mapping** | Settings

Search In Filter By Show Only

Name on Card
Name on Card
Account Number (exact match)
Last Segment
Employee ID (exact match)

Contains 123
None

Manage Card Programs | Manage Accounts | **Manage Transactions** | Manage Lodge Transactions | Merchant Code Mapping | Settings

Some transactions may not be in the system yet. It can take up to 14 days for a bank to post a charge and for it to appear in Concur. [Learn more](#)

Switch to old experience

Start Date * 04/03/2024 End Date * 05/03/2024 Last 4 Digits of Card, Name on Card or Employee ID Amount (Minimum) Amount (Maximum)

Merchant/Vendor Status Sub-Status

All **Search In** selections are now combined so that any typed value will return a result.

Duplicate transactions are displayed using the **Potential Duplicate** attribute, and the informational window includes a link to release the transaction to the employee:

☐	Date	Status	Last 4 Digits of Card	Assignee Name
☐	12/20/2023	Card Not Assigned		
☐	12/20/2023	Hidden for Employee Potential Duplicate		
☐	12/20/2023	Hidden for Employee Potential Duplicate		
☐	12/20/2023	Visible to Employee Unassigned to a Report		
☐	12/20/2023	Visible to Employee Unassigned to a Report		
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere

Transaction Hidden

Potential Duplicate

There is already a transaction in Concur with similar attributes. Therefore, this transaction was identified by our system as a duplicate during import and hidden. Releasing this transaction will make it visible to the user for addition to an expense report.

[Release this transaction](#)

Transactions both already assigned to a report or posted prior to assignment date is clearly marked. Hovering with the mouse on the status opens an informational window describing the condition, action, and links to act as needed:

Start typing to see matches		Hidden for Employee	
Release to Employee	Hide for Employee	Assign Card	
☐	Date	Status	
☐	04/11/2014	Hidden for Employee Posted Prior to Effective Date	
☐	04/11/2014	Hidden for Employee Posted Prior to Effective Date	
☐	04/11/2014	Hidden for Employee Posted Prior to Effective Date	
☐	04/11/2014	Hidden for Employee Posted Prior to Effective Date	
☐	07/28/2014	Hidden for Employee Posted Prior to Effective Date	
☐	07/28/2014	Hidden for Employee Posted Prior to Effective Date	5551 Traveller Everywhere
☐	07/28/2014	Hidden for Employee Posted Prior to Effective Date	5551 Traveller Everywhere

Transaction Hidden

Posted Prior to Effective Date

This transaction has been hidden based on effective date criteria.

Releasing this transaction will make it visible to the user for addition to an expense report.

[Release this transaction](#)

Currently configured effective date on card account: 07/31/2018

[Modify Effective Date](#)

Please note: The effective date setting affects transactions only at time of import. Existing transactions imported prior to modifying this setting will need to be manually released.

☐	Visible to Employee	Assigned to a Report	
☐	Visible to Employee	Assigned to a Report	
☐	Visible to Employee	Assigned to a Report	
☐	Visible to Employee	Assigned to a Report	8888 D03 User

Transaction Visible

Assigned to a Report

This credit card charge is used in a report. Transactions in a report cannot be hidden.

Report Name: Test rich data

Report Owner: D03 User

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Expense Pay

(Canada) Changes for Bank Information

Overview

Previously, the **Province** field in the user banking screen for Canada allowed free-form text for the user to enter the full name of the Province or enter the two-digit Province ID.

As of May 23rd, 2024, for users receiving Expense Pay reimbursements in Canadian Dollars (CAD), the **Province** field is updated to a dropdown list and the users must select from a list of valid Canadian provinces. In the future, users who enter or *update* their **Bank Information** page in Profile will need to select a province from the dropdown list if they have entered something other than a valid province code in their province field previously.

Existing users will still get reimbursed even if they do not have a valid province selection saved in their user banking information. This change is applicable to first time users and for anyone who updates their bank information in the future, so the data becomes standardized over time.

This standardization is being done now due to a requirement change from our payment providers and for consistency of data.

End-User Experience

For Canadian users, the field **Province** that displays on the **Banking Information** page in Profile (**Profile > Profile Settings > Bank Information**) is updated to a dropdown list. Users are asked to make a valid selection in the **Province** field to be able to save or update their banking.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Miscellaneous

Travel and Expense Statement (Reisekostennachweis) for Germany

Overview

SAP Concur now allows you to print or download Travel and Expense Statement which contains the details of your itinerary and the corresponding travel allowance paid to you. You can access this statement at any stage after creating a new expense report and use it as a proof of your travel and the allowance paid for it.

IMPORTANT: Travel and Expense Statement is only available in English as of now. It is also likely to be available in German in Q3 2024.

End-User Experience

The user can access the statement by opening the completed expense report and then selecting **Print/Share > Travel and Expense Statement**.

Itinerary Overview and **Itinerary Allowance Details** sections of the statement show the itinerary and the travel allowance paid for it, respectively.

Configuration / Feature Activation

Enable the Travel and Expense Statement by following the steps:

1. In **Administration > Expense > Policies**, select the expense policy for which you want to enable the travel and expense statement, then click **Print Formats**.
2. Select **Travel and Expense Statement** and then click **Activate > Done**.



For general information about this functionality, refer to the [Concur Expense: Printed Reports Configuration Setup Guide](#).

Processor Queries

New Expense Processor Search Query Parameter

Overview

As of June 19th, 2024, for processors, a new expense processor search query parameter: **Sent for Payment Date** is included in the custom search query tool. This parameter corresponds to the last step of the workflow for an expense report inside Concur Expense.

For example, an expense report has the "Sent for Payment" date populated when it is either recorded in a Standard Accounting Extract file or when an expense report's status is successfully updated to "Integrated" if the client uses the financial integration service. Using the new parameter, the processor can filter reports.

The update helps improve the search options and the visibility for various auditing tasks and data retention tasks for customers.

Processor Experience

Processors can see a new search query parameter **Sent for Payment Date** that they can then choose when they run a new custom search query in **Expense > Processor** (tab) > **Process Reports** or **Expense > Process Reports** page.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Reports

Preferred Name for Expense Submitter

Overview

As of May 27-28, 2024, Concur Expense supports preferred names for users submitting expenses. The users can view the preferred name that has been setup for approvers, company attendees, and other elements that display a name field, if the preferred name has been configured for the user.

In Concur Expense, users were always able to set a preferred name for themselves. Now, the SAP Concur displays the preferred names of approvers, company attendees, and other names that an expense submitter will see in the system.

For example, if a user with expense approver permissions has specified a preferred name, this preferred name displays to users submitting expenses, when selecting an approver, or when viewing the timeline for an expense report.

Similarly, if another user in the same company has specified a preferred name in Concur Expense, an expense submitter sees the preferred name when searching for an attendee, and when the user has been added as an attendee to an expense.

This update offers users the flexibility to set up their own preferred names at work, compared to using their given first names and improves user satisfaction.

End-User Experience

The user who is an expense submitter sees the preferred names that is configured for other employees that they interact with in the system, if their locale supports

preferred name. This preferred name appears in places where the users may have seen the given name of the employee previously.

The following screens in Concur Expense display the configured preferred name.

REPORT LIBRARY:

The approver's name displays when the report is pending approval or returned to submitter.

Home / Expense / Manage Expenses

Manage Expenses

Report Library

PREF_NAME 05/08/2024 \$260.00 Returned Sent Back (Returned) to Employee Aprov02 Pref NGE	XPR-51418 05/08/2024 \$35.00 Returned Sent Back (Returned) to Employee	Copy: bu 11/28/2023 \$1,745 Returned Sent Back (Returned) to Employee ADMINN nge
attendee test 07/12/2023 \$200.00 Returned	bug bash 07/12/2023 \$100.00 Returned	dev 04/17/2023 ¥1,200 Returned

REPORT PAGE:

The preferred name displays in multiple places inside the report:

- In the comments section for a returned report where the name of the person who adds a comment displays.

SAP Concur Expense

Manage Expenses

Home / Expense / Manage Expenses / Monthly expenses

Report Comment PreferredName Nge: Please update the expenses indicated to the correct cost center and resubmit.
Thank you. [View Report Timeline](#)

Monthly expenses \$15.00

- In the **Report Header**, where the report owner's name displays if the field is configured on the form
- Expense entries list
- Expense details

REPORT TIMELINE AND APPROVAL FLOW

- Name of the person who acted (workflow changes - submitted, approved, and so on)
- Name of the approver for a workflow step
- Approver search, if configured.

Report Timeline
PREF_NAME | \$260.00

Approval Flow [Edit](#)

- Manager Approval
Approver02 NGE
- test
- test1
- test3
- Approval for Processing

Report Summary [Sort](#) [Filter](#)

Report Comment 0/500

Wednesday, May 8, 2024

Status: **Sent Back (Returned) to Employee**
Status Updated: Aprov02 Pref NGE
May 8, 2024 12:27 PM

Report Comment - \$260.00

Aprov02 Pref NGE May 8, 2024 12:27 PM
Return this report

Status: **Submitted**
Status Updated: PREF_JAY Han
May 8, 2024 12:24 PM

Status: **Submitted And Pending Approval**
Status Updated: PREF_JAY Han
May 8, 2024 12:24 PM

Status: **Sent Back (Returned) to Employee**
Status Updated: PREF_JAY Han
May 8, 2024 12:23 PM

Status: **Submitted**
Status Updated: PREF_JAY Han
May 8, 2024 12:22 PM

Status: **Submitted And Pending Approval**
Status Updated: PREF_JAY Han
May 8, 2024 12:22 PM

[Expense Comment - Dinner - May 8, 2024 - \\$200.00](#)

AUDIT TRAIL

Audit trail displays the preferred name of the person who made the change.

EXPENSE ATTENDEES

The preferred name displays only for the system employee attendee type:

- In the list of attendees associated with the expense entry
- Search results

- Attendee detail

Attendees

Dinner | \$200.00

Alerts: 1

Attendee invalid

Attendees: 3

AddRemoveCreate Group

	Attendee Name1	Attendee Title1	External ID1	Company1	Attendee Entry Custom 21	Attendee Entry Custom 31	Attendee Entry Custom 31	Attendee Entry Custom 51	Total Amount Previous Year1	Custom 201
☐	Aprov02 Pref NGE		Approver02@NGE		None Selected	None Selected			0	...
☐	John, lee				None Selected	None Selected			0	...
☐	PrefName NGE		approver01@nge.com		None Selected	None Selected			0	...

REPORT PAYMENTS

The preferred name of the report owner who received the payment displays on screen.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

 For further updates related to this feature, visit the [Preferred Name Locale](#) topic in SAP Concur Developer Center.

Travel Allowance Service

Calculate Additional Travel Allowance for Travel outside Working Hours in Austria

Overview

SAP Concur now allows you to calculate additional travel allowance for the time spent in traveling outside of the regular working hours. For this purpose, SAP Concur provides you a new calculation rule titled **Based on time of departure until arrival, excluding duration of stay**. You can configure it as a part of your client rate bundle.

IMPORTANT: This calculation rule is provided for various CLAs (Collaborative Labor Agreements) in Austria and *does not* affect the statutory rate bundles.

The calculation rule considers only the time spent in actual travel, from departure to arrival, and not the time an employee spends at any given location. The rule is applicable for domestic as well as foreign travels. The allowance is calculated in addition to the daily allowance an employee is eligible for.

The rate file given as an example with this calculation rule supports the following rates and calculations; however, they remain fully customizable.

- On weekdays:

For travel outside regular working hours on weekdays, 1/7th of the daily allowance is calculated for each started hour.

- On weekends and public holidays:

For travel outside regular working hours starting from 1 PM on Saturdays, and on Sundays or public holidays, 25% of the daily allowance is calculated for each started hour.

- At nights:

For nighttime travel between 22:00 and 6:00, the calculation for up to 3 hours happens as per one of the rules above. If the travel time crosses 3 hours, full overnight rate is given to the employee.

While configuring this rule in your client rate bundle, you can customize the working hours and the rate per hour based on your need.

SAP Concur recommends setting up a specific rate type called **Travel Times** with **Incidentals** as the rate category and assigning this new calculation rule for **Location for rate determination, domestic** and **Location for rate determination, foreign**.

IMPORTANT: Travel Allowance Service does not currently support salary-based calculation of additional allowance for travel outside working hours.

End-User Experience

While creating an expense report, in the **Adjustments** step, the user will need to use the **Travel Times** drop-down and choose among **Travel time Monday-Friday**, **Travel time Saturday**, or **Travel time Sunday**.

Date/Location	Exclude Day	Travel Times	Overnight	Breakfast	Lunch	Dinner	Reimbursement Amount
All Days Dates: 2	☐	Travel time Monday-Friday	☐	☐	☐	☐	
	☐	Travel time Monday-Friday	☐	☐	☐	☐	
	☐	Travel time Monday-Friday Travel time Saturday Travel time Sunday	☐	☐	☐	☐	
Total:							\$1,200.00

Later in the **Reimbursement Details**, the user will see the additional daily allowance listed separately against the rate type **Travel Times**.

Configuration / Feature Activation

Reach out to your implementation team / partner to configure this calculation rule in your client rate bundle. However, basic steps for configuring the calculation rule into your client rate bundle are as follows:

3. Create a rate type called **Travel Times** with **Incidentals** as the rate category and assign the calculation rule to it.
4. Create meal types as required, for example, additions for Monday to Friday, Saturdays, and Sundays or public holidays.
5. Set up rates by using the example rate file that uses 08:00 to 17:00 as standard working hours, and 1/7th and 25% of the daily allowance for the calculation. Make changes to this if needed.



For more information, refer to [Concur Expense: Travel Allowance Austria Statutory Bundles Setup Guide](#).



For general information about this functionality, refer to the [Concur Expense: Travel Allowance Generic Configurable Bundle Setup Guide](#).

Calculate Total Foreign Travel Time of up to 5 Hours as Domestic in Austria

Overview

SAP Concur now allows you to calculate total travel time of less than or equal to 5 hours (300 minutes) spent in a foreign location as domestic travel. For this purpose, SAP Concur provides you a new calculation rule titled **Used by Austria only – based on border crossing time, handling foreign trip parts totaling up to 5 hours as domestic**. You can configure it as a part of your client rate bundle.

IMPORTANT: This calculation rule is provided for various CLAs (Collaborative Labor Agreements) in Austria and *does not* affect the statutory rate bundles.

The time spent in a foreign location is calculated from border crossing to border crossing. If an itinerary has multiple foreign travels, all of them are added to get the total foreign travel time. If this time is less than or equal to 5 hours, it is added to the domestic part of the itinerary and the daily allowance is calculated as per the domestic rate.

If the total foreign travel time exceeds 5 hours (301 minutes or more), the entire duration is considered as foreign travel and the daily allowance for it is calculated as per the foreign rate.

SAP Concur recommends assigning this new calculation rule for **Location for rate determination, foreign** while configuring it for your client rate bundle.

Configuration / Feature Activation

Reach out to your implementation team / partner to configure this calculation rule in your client rate bundle.



For more information, refer to [Concur Expense: Travel Allowance Austria Statutory Bundles Setup Guide](#).



For general information about this functionality, refer to the [Concur Expense: Travel Allowance Generic Configurable Bundle Setup Guide](#).

Removal of Rate Type "Incidentals" for the Foreign Travels of Polish Employees

Overview

The Polish users of Travel Allowance Service can now no longer see the rate type "incidentals" while creating an expense report for their foreign trips. This change is made by SAP Concur to stay compliant with the local statutory requirements.

The employees can no longer see the split of the daily allowance between "meals" and "incidentals" while creating an expense report for foreign trips. With the removal of the "incidentals" rate type, they can only see one rate type "meals", and the deductions for any provided meals are calculated on this. However, the employees remain entitled to receive at least 25% of the prorated daily allowance, despite deductions.

End-User Experience

The users can see only one rate type "meals" besides the "lodging" rate type. As a result, there is only one expense entry for meals per day and fewer deviating reimbursement amounts due to rounding off.

Configuration / Feature Activation

For the statutory rate bundle, this feature is automatically available and there are no configuration or activation steps. For changes in the client rate bundle, raise a ticket to the Services.



For more information, refer to the [Concur Expense: Travel Allowance Poland Statutory Bundle Setup Guide](#).

Trip Within a Trip Configuration for Rates

Overview

The Travel Allowance Service (TAS) feature supports the ability for an administrator to configure the rate bundle according to trip within a trip parameter, in addition to trip within a trip configuration in Adjustments.

This feature supports business rules around overlapping trips.

Administrator Experience

The administrator navigates to **Administration > Expense > Travel Allowance Configuration > Rate Bundles** and selects **View Contents** (📄) for the already configured rate bundle.

The administrator next opens (✎) the rate bundle in the **Rate** tab for editing and scrolls to the newly included section **Trip Within the Main Trip** in the **Edit Rate** screen.

These are additional parameters available to the administrator to configure rates for a trip within a trip feature.

The screenshot displays the SAP Concur Travel Allowance Configuration interface. On the left, the 'Edit Rate' screen shows fields for 'Rate Bundle', 'Rate Type', 'Amount', 'Valid From', 'Applicable for (Days)', and 'Location'. The 'Trip Within the Main Trip' section is highlighted with a red box and labeled 'New section added to the screen'. This section includes fields for 'Overlap Type', 'Main Trip or Trip Within', 'Applicable for', 'Trip Destination', and 'Trip Within the Main Trip'. On the right, the 'Rate Bundles' table lists various rate bundles. A red box labeled '1. Select View Contents for a rate bundle' points to the 'View Contents' icon in the 'Actions' column of the 'TEST_BERND_TRIP_WITHIN_TRIP' row. Another red box labeled '2. Click Edit to update the rate bundle' points to the 'Edit' icon in the 'Actions' column of the 'TEST_BERND_TRIP_WITHIN_TRIP' row.

Configuration / Feature Activation

This feature can be configured by the Travel Allowance Configuration administrator or SAP Concur personnel.

Verify

Incorrect Amount Check for Overspend Claim (June 17-18)

Overview

Released between June 17 – June 18, Concur Verify has introduced a new **Amount overspend** checkbox in the **Incorrect Amount** check. This will identify an overspend where the report amount exceeds the receipt amount.

For existing configurations, the **Amount mismatch** remains the default setting for the **Incorrect Amount** check. Administrators need to adjust this if they wish to check for overspend.

For new configurations, the **Amount overspend** is the default setting for the **Incorrect Amount** check, unless adjusted by the administrator.

Administrator Experience

To enable the **Amount overspend** check, navigate to **Audit Profile > Check Details**. In the **Check Name** dropdown box, select **Incorrect Amount**. For the **Claim Amount Parameter** field, select **Amount overspend**.

If the **Amount overspend** is not enabled, then the existing **Incorrect Amount** checks will be defaulted to **Amount mismatch** and new checks is defaulted to **Amount overspend** only.

SAP Concur

Product Settings > Verify Audit Profiles > Audit Profile > Check Details

Check Details

Check Name
Incorrect Amount

Description
We review the receipt and attempt to determine the amount and currency. Exceptions will be raised if the amounts don't match or if the report amount exceeds the receipt. This can be configured using the claim amount parameters. The allowable discrepancy between the receipt and the expense report is also configurable.

Conditions

Amount Trigger
5

Expense Type Trigger
All

Claim Amount Parameter
☐ Amount mismatch ☒ Amount overspend

Allowable Discrepancy Amount

Quick Help

The amount mismatch occurs when the receipt amount doesn't match the expense report amount. The amount overspend happens when the expense report amount exceeds the receipt amount.

Currency *

US, Dollar (USD)

Auditor Responses

Add Auditor Response

Status Type	Auditor Response	Comment to Employee	Actions
Pass	Incorrect Exception		
Fail	Out of policy	The amount on the receipt is missing, incomplete, or does not match the amount of the expense. Please enter the correct amount or mark the rem...	
Pass	Approve with Exception	Approved with exception: Incorrect amount identified	

Save

Save and Add Another

Cancel

THE BEST RUN

SAP

SAP Concur

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Attendees

Planned Changes Adding Attendees in Bulk

Information First Published	Information Last Modified	Feature Target Release Date
June 14, 2024	--	June 24 – 25, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

In an upcoming release, Concur Expense users will be able to add multiple attendees to an expense report in bulk by simply copying and pasting the employees' email addresses into the application. This feature only works for employees (internal attendees) and is not available for other types of attendees.

Currently, the system supports bulk attendee upload, and this can be performed using attendee import through a spreadsheet.

This update will help reduce time and effort for an expense user while adding multiple attendees for a report, without the creation of duplicate attendee records.

End-User Experience

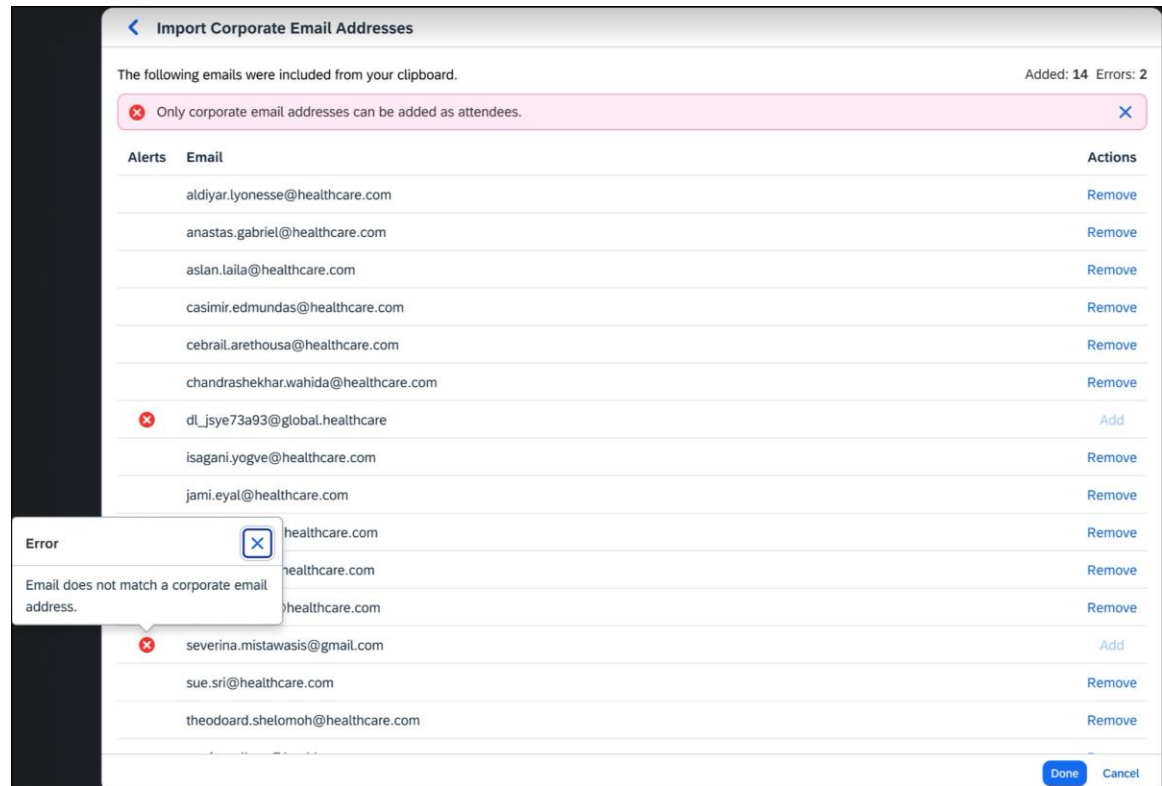
When users want to add multiple attendees to an expense report, they will open the **Add Attendees** dialog and select **Employee** in the **Attendee Type** list on the **Search Attendees** tab.

They will now see a new button **Import Corporate Email Addresses** display on the screen. Next, they will copy and paste the email addresses of all the employees that are attendees for the expense entry and click **Next**.

The screenshot displays the 'Add Attendees' interface in SAP Concur. At the top, there are tabs for 'Search Attendees', 'Recent Attendees', 'Attendee Groups', and 'No Shows'. Below these is the 'Search Criteria' section with fields for 'Attendee Type' (set to 'Employee'), 'First Name', 'Last Name', 'Preferred Name', 'Email', 'Company', and 'Custom Field 1'. To the right of the search fields are 'Reset' and 'Search' buttons. A red box highlights the 'Import Corporate Email Addresses' button, which is located below the search criteria. Below this, a modal window titled 'Import Corporate Email Addresses' is open. It contains a text area with a list of email addresses separated by semicolons, such as 'Cassiday, Lukas <lukas.cassidy@healthcare.com>; Cassiday, Lukas <lukas.cassidy@healthcare.com>; Shelomoh, Theodard <theodard.shelomoh@healthcare.com>;'. To the right of the text area are 'Add' and 'Remove' buttons. At the bottom of the modal are 'Next' and 'Cancel' buttons. A red arrow points from the 'Import Corporate Email Addresses' button in the main interface to the modal window.

The attendees will be added to the expense entry in bulk. To finish, they will click **Done** and exit the screen.

NOTE: Concur Expense will only allow employees who have their email addresses listed in the system to be included as attendees.



Configuration / Feature Activation

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

Expense

****Planned Changes** Expense Integration with Microsoft Teams**

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	--	Q3 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for a future release, Concur Expense will integrate with Microsoft (MS) Teams. This integration will allow users to collaborate on Concur Expense tasks without leaving MS Teams.

End-User Experience

Once MS Teams is enabled for an organization, the SAP Concur app can be added to the user's MS Teams. Once within the SAP Concur app within MS Teams, the user can type search terms such as "Expense" or "Expense Approvals" to retrieve entire reports. A list with the latest five active reports will appear.

Expense reports will be available to view in MS Teams or to be shared with an approver in a chat.

Approvers will be able to search expense reports from their approval queue. A list with the latest five active reports will appear. Approvers will be able to approve or reject reports from within MS Teams.

Configuration / Feature Activation

This feature is enabled by default. There are no configuration steps.

Itemizations

****Planned Changes** Recurring Itemizations in Expenses**

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	June 14, 2024	June 24-25, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

In an upcoming release, the multiple itemization recurrence options in Concur Expense will be combined into a single, user-friendly drop-down menu, from which the user can select the recurrence frequency.

This change is applicable to all expense types where there is a possibility for recurrence of itemizations.

For example, when the user has entered all details pertaining to the hotel, the user will need to itemize their hotel expenses. The user will now see this user friendly drop-down list within the nightly lodging wizard for hotel expenses.

This feature will allow the user to create multiple expense entries during the itemization process, as well as provide the same amount per day, or different amounts each day.

This change will make the recurrence checkbox more discoverable and will reduce complexity in creating itemization for expenses. The users will be able to efficiently manage their itemized expenses in a shorter time with a better streamlined process.

End-User Experience

On the **Itemizations** tab in Concur Expense, the field **Entry Type > Recurring Itemization** will be replaced with a new **Recurrence** drop-down list. After the **Expense Type** is selected, the user will now choose an option from the **Recurrence** drop-down list. This change applies to all expense types where there is a **Recurrence** checkbox.

For example, if the user selects the expense type **Hotel**, the updated screens will display as follows:

Hotel \$500.00
01/17/2024 | Allstar Hotels

Details | **Itemizations**

Amount \$500.00 | Itemized \$0.00 | Remaining \$500.00

New Itemization

Expense Type *
Hotel

Entry Type:
Recurring Itemization

04/01/2024 - 04/12/2024 (Nights: 11)

Your hotel room rate was:

The Same Every Night | Not the Same

Room Rate (per night)* | Room Tax (per night) | Tax 2 (per night) | Tax 3 (per night)

(Amounts in USD) | [Add Tax Fields](#)

Save Itemization | Save and Add Another | Cancel

Expense Type *
Hotel

Recurrence *
Choose recurrence
Not recurring
Same daily amount
Different daily amount

For the **Hotel** expense type, the current UI contains the options **The Same Every Night** and **Not the Same**. This will be updated to display the selections **Same Daily Amount** and **Different Daily Amount** as follows:

Example: Same Daily Amount Screen

DetailsItemizations

Total Amount602.50 USD

Itemized550.00 USD

Remaining52.50 USD

New Itemization

Allocate

Required Field

Expense Type *

Hotel

Recurrence *

Same daily amount

Nights: 2

Date	Room Rate *	Room Tax
11/11/2024	250.00	25.00
11/12/2024	250.00	25.00

Add Tax Fields

Business Purpose

Vendor *

Tree Plaza Hotel

Personal Expense (do not reimburse)

Example: Different Daily Amount Screen

DetailsItemizations

Amount\$33.00

Itemized\$60.00

Over\$27.00

New Itemization

Required field

Expense Types *

Hotel

Recurrence *

Different daily amount

Nights: 2

Date	Room Rate *	Room Tax	Tax 2	Tax 3
04/18/2024				
04/19/2024				

(Amounts in USD)Add Tax Fields

Combine room rate and taxes into a single entry

Save Itemization

Save and Add Another

Cancel

For the **Non-Hotel** Itemization expense types, the user will now choose an option from the **Recurrence** drop-down list.

The screenshot shows the 'New Itemization' form. At the top, there are tabs for 'Details' and 'Itemizations'. Below the tabs, there are three summary fields: 'Amount' (¥10,000), 'Itemized' (¥0), and 'Remaining' (¥10,000). The main section is titled 'New Itemization' and contains two dropdown menus: 'Expense Types *' (with 'Fuel' selected) and 'Recurrence *' (with 'Choose recurrence' selected). A red box highlights these two dropdowns. At the bottom, there are three buttons: 'Save Itemization', 'Save and Add Another', and 'Cancel'. A red asterisk indicates that the 'Expense Types' and 'Recurrence' fields are required.

Once the user selects a recurrence option, the updated screens will display as follows:

The screenshot shows the 'New Itemization' form after the 'Recurrence' dropdown has been updated. The 'Expense Types *' dropdown still shows 'Fuel'. The 'Recurrence *' dropdown now shows 'Same daily amount'. Below this, there is a 'Nights: 2' field. The 'Transaction Date' section has two rows, each with a date field (06/12/2024 and 06/13/2024) and an 'Amount in JPY *' field. The 'Tax Posted Amount' field is empty. The 'Personal Expense (no reimbursement) *' dropdown shows 'No'. A red box highlights the 'Recurrence *' dropdown and the 'Transaction Date' section. At the bottom, there are three buttons: 'Save Itemization', 'Save and Add Another', and 'Cancel'. A red asterisk indicates that the 'Recurrence' and 'Personal Expense' fields are required.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Japan Public Transport (JPT)

****Planned Changes** Addition of New JPT Relevant Fields in Audit Rules**

Information First Published	Information Last Modified	Feature Target Release Date
June 14, 2024	--	July, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for July 2024, three new JPT relevant fields will be introduced as part of the audit rule configuration to enable auditing of selected expenses before reimbursement.

The new fields will be as follows:

- Route search order type / Trip attribute (Fast / Easy / Cheap)
- Seat type (Reserved / Non-Reserved / Green (first class))
- Additional charge

The audit rule configuration based on these fields will be a pre-requisite that serves towards the Public Services market.

This update will help customers enforce checks before an expense report is submitted for reimbursement based on company policies.

Administrator Experience

On the **Audit Rules > Custom** page, the Expense Administrators will configure values for the JPT specific audit rules as shown in the following image:

Expense Admin

Audit Rules

Custom Random

1 Audit Rule 2 Conditions 3 Exception

Insert Remove

Data Object/Operator	Field/Value	Operation	Exception
Entry	JPT - Is Route Cheap	Equal	JPT - Additional Charges
Value	Yes		JPT - Is Route Cheap
			JPT - Is Route Easy
			JPT - Is Route Fast
			JPT - Seat Type
			Last Modifying Source
			Merchant Tax ID
			Mileage Overage
			Mileage Vehicle Type
			Missing Tax Receipt
			Number Of Days (Car Rental E-Receipt)
			Number Of Units (Booked)
			Number of Attendees
			Number of days the vehicle was rented
			Org Unit 1
			Org Unit 2
			Org Unit 3
			Org Unit 4
			Org Unit 5
			Org Unit 6
			Passenger Count
			Payment Type
			Personal Distance
			Personal Expense (do not reimburse)

Cancel <<Previous Next>>

End-User Experience

When these JPT specific audit rules are configured, the user will be alerted to fix their entries to be able to submit their expense reports.

SAP Concur Expense

Manage Expenses

Home / Expense / Manage Expenses / EntrySave_AuditRule

Alerts: 6

Expense	Japan Public Transportation	06/13/2024	¥7,280
Entry Save : Select different seat type other than reserved. View			
Entry Save : Origintype is route search. Select different origin type. View			
Entry Save : Additional Amount is more than 500 View			
Entry Save : Route is cheap. Please select other. View			
Entry Save : JPT route is fast. Please select other. View			
Entry Save : JPT route is easy. Please select other. View			

EntrySave_AuditRule \$46.43

Not Submitted | Report Number: AP134U

Report Details Print/Share Manage Receipts View Available Receipts

Add Expense Edit Delete Copy Combine Expenses Move to

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
		Cash	Japan Public Transportation		06/13/2024	¥7,280	\$46.43
			Route Details			\$46.43	\$46.43

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.



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

Mileage (Legacy and Service)****Planned Changes** New Vehicle Types Added to Conform to Carbon Dioxide (CO2) Netherlands Regulatory Requirements**

Information First Published	Information Last Modified	Feature Target Release Date
June 2024	--	July 1, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for July 1st, 2024, SAP Concur will update the Mileage Configuration tool in both the Legacy and Service versions to include new vehicle types for the Netherlands. The purpose of this update is to provide updated vehicle criteria to the client that conforms to new country-wide regulations requiring companies to report the total carbon dioxide (CO2) consumption on an annual schedule.

This feature will support the client's need to report the annual total consumption of CO2 across their fleet of vehicles used to conduct business.

Administrator Experience

The Expense administrator will act based on the Mileage version they are using:

- **Legacy:** The Expense administrator must ensure the client has the **Car Type** field set to **Personal Car – Variable Rates** option.

Next the administrator must create a new Custom List of Vehicle Types for the Netherlands. Before creation of this list, first confirm which vehicle type values the customers would like their users to select from, as not all the types may be necessary.

Dutch	English
Fiets (niet OV-fiets)	Bike (not public transport bike)
Auto, brandstof benzine	Car, fuel gasoline
Auto, brandstof diesel	Car, fuel diesel
Auto, brandstof (plug in) hybride	Car, fuel (plug in) hybrid
Auto, brandstof overige	Car, fuel other
Auto, 100% elektrisch	Car, 100% electric
Motorfiets, brandstof benzine	Motorcycle, fuel gasoline
Motorfiets, 100% elektrisch	Motorcycle, 100% electric
Scooter/Bromfiets, brandstof benzine	Scooter/Moped, fuel gasoline
Scooter/Bromfiets, 100% elektrisch	Scooter/Moped, 100% electric

Add a field to the **Car Entry Form** called **Vehicle Type** (custom 1) and link it to this new list of vehicle types.

Finally, a Cognos Intelligence Report will likely need to be created according to the clients requirement.



For additional information, visit the [Reporting obligation work-related personal mobility \(rvo.nl\)](#) website.

- **Service:** The new rates are automatically available, and the administrator will need to alert their end-users to adopt the new vehicle types based on the Personal car and vehicle type it matches.

Mileage Configuration

Country/Region:
Netherlands ▼
Add Country/Region

Rates
Automatic Rates ▼
Select Group

Mileage Rate Applied to Group
Global

Personal Car Company Car

☐ Show Historic Rates
Save

Effective Date	Rate
01/01/2024	0.22
01/01/2023	0.21

Finally, a Cognos Intelligence Report will need to be created later this year as the Cognos report solution needs to have this vehicle type being ingested into the solution.

End-User Experience

When the Mileage administrator has confirmed and performed any configuration, the end-user applies the updated vehicle types based on the Mileage version they are using:

- **Legacy:** The end-user will next select the specific vehicle type listed in the **Custom List of Vehicle Types** into the car registration form that has been created by their administrator and save this configuration.

Car Registration

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.
Reimbursement Method: Personal Car - Variable Rates

New Remove

Vehicle ID
TEST

Type of Reimbursement
Nobian Employee ▼

Fuel Type
Car - Diesel
Car - Fully Electric
Car - Hybrid
Car - Other Fuel type
Car - Petrol

☐ Preferred Car

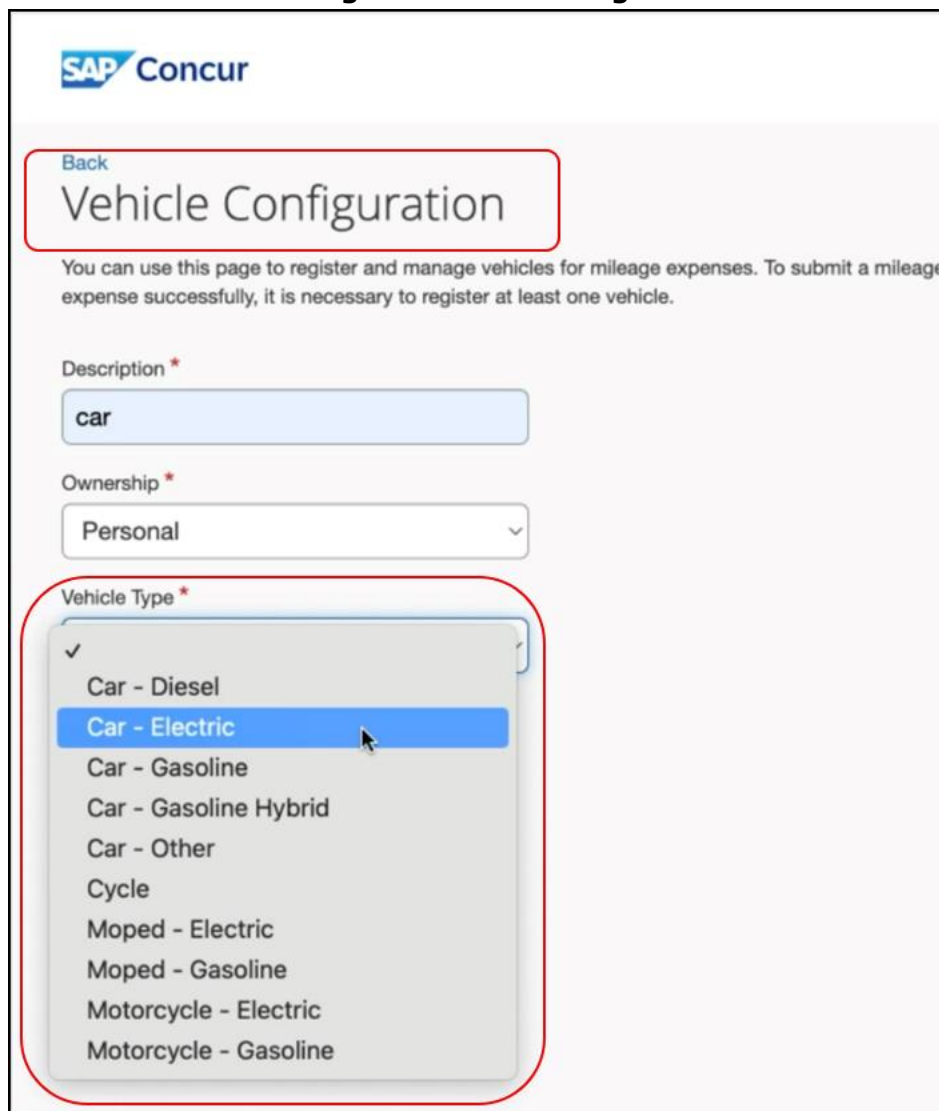
Save Cancel

☐ Vehicle ID

No cars found for this configuration

type of reimbursement Active

- **Service:** The new rates are available as options when opening the end-user's **Profile Settings > Vehicle Configuration** view.



The end-user must update their existing car configuration to match the choices, based on CV criteria, or choose the correct criteria when creating their new car configuration.

If the user does not update their existing car configuration with a new vehicle type, then an error will be displayed upon submission of an expense report.

Configuration / Feature Activation

The administrator will need to confirm and configure vehicle types as explained in this release note, and the end-user will need to match the vehicle criteria to the new or existing car(s) they are using for business travel.



For more information, refer to *Concur Expense: Mileage Service Setup Guide*.

Travel Allowance Service

****Planned Changes** Default Travel Itinerary from Travel Plan**

Information First Published	Information Last Modified	Feature Target Release Date
June 14, 2024	--	June 30, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

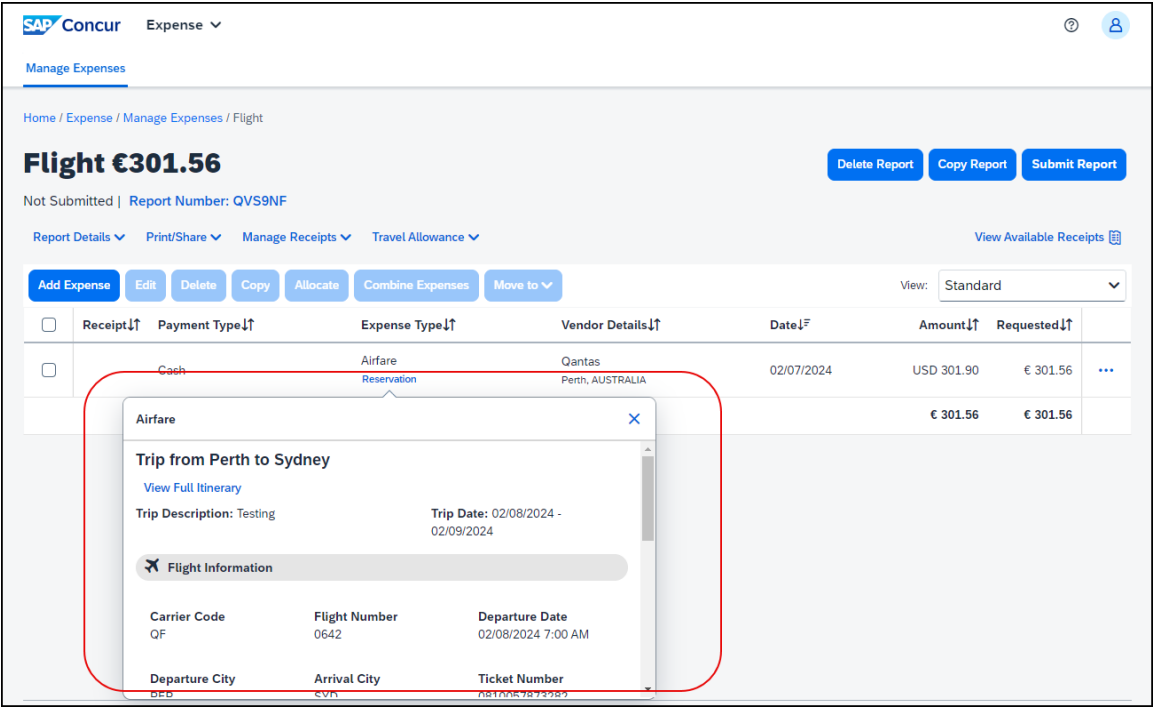
In Concur Expense, when the user creates a travel allowance itinerary for an expense report based on a travel booking linked to the expense report, the expense type and travel details such as travel dates and destinations, are automatically populated from the travel booking.

This feature is set to be released sometime in the end of June 2024 and will help the users save time on creating an expense report since they do not have to enter their travel details again.

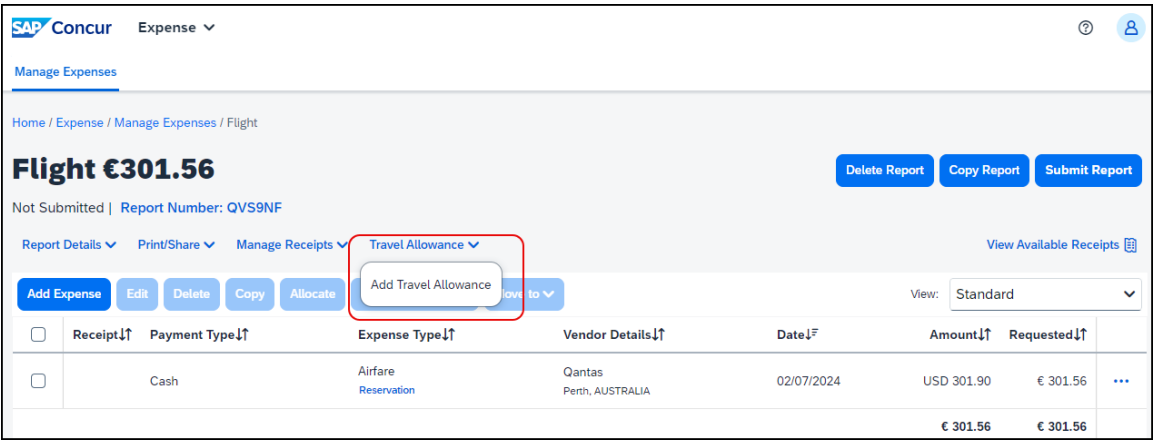
End-User Experience

When the user creates an expense report from a travel booking done in Concur Travel, an expense type with booking information will be included automatically into the expense report.

For example, in the image below, there is an expense type added automatically into an expense report resulting from the flight booking in Concur Travel.



When a travel itinerary is added for this expense, the travel allowance itinerary is auto populated with the travel dates and destinations from the associated travel booking done in Concur travel.



Travel Allowance

Itinerary

Itinerary Name *

Flight

Detailed Itinerary ?

Without overnight ?

Allowance Category *

Company

Start Location *

Perth, AUSTRALIA

Start Date *

08/02/2024

Start Time *

7:00 AM

+ Add Destination

Arrival Location *

Sydney, AUSTRALIA

+ Add Destination

End Location *

Perth, AUSTRALIA

End Date *

08/07/2024

End Time *

6:00 AM

Next: Adjust your travel allowance

Next

Cancel

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

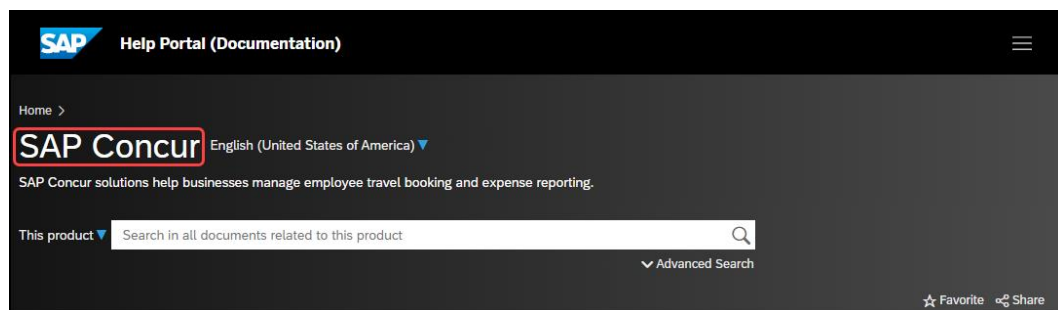
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

► ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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SAP Concur Release Notes Concur Expense Professional / Premium	
Month	Audience
Release Date: June 2024 Initial Post: June 21, 2024	Client FINAL

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Release Notes

This document contains the release notes for Concur Expense professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Cards

Retention Period of Credit Card Data Files

Overview

As of May 24, SAP Concur has implemented a process for compliance reasons, where the card data files received from external sources (issuing banks, card associations) is deleted from the system after 90 days.

Normally, the practice was to automatically import and load the data contained in the data files within 24 hours of receipt. If the raw data is now required after the 90-day window, clients can work with their issuing bank to have these files re-sent.

This update is meant for offering data protection and privacy compliance.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Company Card

Enhancements to the Manage Transactions Screen

Overview

Enhancements to the **Manage Transactions** screen are available to the Company Card administrator. These changes are visible by default and the administrator can work with the new user interface and then decide to revert to the earlier version or continue with the newer version which will become the default user interface in an upcoming release.

With this change, administrators can easily view transactions based on flexible search criteria, including transactions assigned to expense reports. The new feature returns search results from the previous 30 days with the ability to perform a more

complex search that displays hidden, visible, duplicate, and expensed transactions in a column order view familiar to administrators working in a financial statement format.

Administrator Experience

Upon first opening of the screen, the Company Card administrator can see the simple search format of employee transactions automatically filtered for the previous 30 days. Transactions that are both hidden and visible to employees (including transactions that are already on an expense report) are returned.

From this simple format, the administrator clicks **Open Filters** to refine the search:

The search combines the logic for multiple possible search elements:

Duplicate transactions are displayed using the **Potential Duplicate** attribute, and the informational window includes a link to release the transaction to the employee:

☐	Date	Status	Last 4 Digits of Card	Assignee Name
☐	12/20/2023	Card Not Assigned		
☐	12/20/2023	Hidden for Employee Potential Duplicate		
☐	12/20/2023	Hidden for Employee Potential Duplicate		
☐	12/20/2023	Visible to Employee Unassigned to a Report		
☐	12/20/2023	Visible to Employee Unassigned to a Report		
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere
☐	12/20/2023	Visible to Employee Unassigned to a Report	8888	Traveller Everywhere

Transaction Hidden

Potential Duplicate

There is already a transaction in Concur with similar attributes. Therefore, this transaction was identified by our system as a duplicate during import and hidden. Releasing this transaction will make it visible to the user for addition to an expense report.

[Release this transaction](#)

Transactions both already assigned to a report or posted prior to assignment date is clearly marked. Hovering with the mouse on the status opens an informational window describing the condition, action, and links to act as needed:

Start typing to see matches		Hidden for Employee	
Release to Employee Hide for Employee Assign Card			
☐	Date	Status	
☐	04/11/2014	Hidden for Employee Posted Prior to Effective Date	
☐	04/11/2014	Hidden for Employee Posted Prior to Effective Date	
☐	04/11/2014	Hidden for Employee Posted Prior to Effective Date	
☐	04/11/2014	Hidden for Employee Posted Prior to Effective Date	
☐	07/28/2014	Hidden for Employee Posted Prior to Effective Date	
☐	07/28/2014	Hidden for Employee Posted Prior to Effective Date	5551 Traveller Everywhere
☐	07/28/2014	Hidden for Employee Posted Prior to Effective Date	5551 Traveller Everywhere

Transaction Hidden

Posted Prior to Effective Date

This transaction has been hidden based on effective date criteria.

Releasing this transaction will make it visible to the user for addition to an expense report.

[Release this transaction](#)

Currently configured effective date on card account: 07/31/2018

[Modify Effective Date](#)

Please note: The effective date setting affects transactions only at time of import. Existing transactions imported prior to modifying this setting will need to be manually released.

Visible to Employee		Assigned to a Report	
Assign Card			
☐	Status		
☐	Visible to Employee Assigned to a Report		
☐	Visible to Employee Assigned to a Report		
☐	Visible to Employee Assigned to a Report	8888	D03 User

Transaction Visible

Assigned to a Report

This credit card charge is used in a report. Transactions in a report cannot be hidden.

Report Name: Test rich data

Report Owner: D03 User

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Expense Pay

(Canada) Changes for Bank Information

Overview

Previously, the **Province** field in the user banking screen for Canada allowed free-form text for the user to enter the full name of the Province or enter the two-digit Province ID.

As of May 23rd, 2024, for users receiving Expense Pay reimbursements in Canadian Dollars (CAD), the **Province** field is updated to a dropdown list and the users must select from a list of valid Canadian provinces. In the future, users who enter or *update* their **Bank Information** page in Profile will need to select a province from the dropdown list if they have entered something other than a valid province code in their province field previously.

Existing users will still get reimbursed even if they do not have a valid province selection saved in their user banking information. This change is applicable to first time users and for anyone who updates their bank information in the future, so the data becomes standardized over time.

This standardization is being done now due to a requirement change from our payment providers and for consistency of data.

End-User Experience

For Canadian users, the field **Province** that displays on the **Banking Information** page in Profile (**Profile > Profile Settings > Bank Information**) is updated to a dropdown list. Users are asked to make a valid selection in the **Province** field to be able to save or update their banking.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Japan Public Transport (JPT)

Addition of New JPT Relevant Fields in Audit Rules

Overview

Three new JPT relevant fields are introduced as part of the audit rule configuration to enable auditing of selected expenses before reimbursement.

The new fields are as follows:

- Route search order type / Trip attribute (Fast / Easy / Cheap)
- Seat type (Reserved / Non-Reserved / Green (first class))
- Additional charge

The audit rule configuration based on these fields are a pre-requisite that serves towards the Public Services market.

This update helps customers enforce checks before an expense report is submitted for reimbursement based on company policies.

Administrator Experience

On the **Audit Rules > Custom** page, the Expense Administrators configures values for the JPT specific audit rules as shown in the following image:

Expense Admin

Audit Rules

Custom Random

1 Audit Rule 2 Conditions 3 Exception

Insert Remove

Data Object/Operator	Field/Value	Operation
Entry	JPT - Is Route Cheap	Equal
Value	Yes	

Is Billable
Is Digitally compliant
Is a Company Card Entry
JPT - Additional Charges
JPT - Is Route Cheap
JPT - Is Route Easy
JPT - Is Route Fast
JPT - Seat Type
Last Modifying Source
Merchant Tax ID
Mileage Overage
Mileage Vehicle Type
Missing Tax Receipt
Number Of Days (Car Rental E-Receipt)
Number Of Units (Booked)
Number of Attendees
Number of days the vehicle was rented
Org Unit 1
Org Unit 2
Org Unit 3
Org Unit 4
Org Unit 5
Org Unit 6
Passenger Count
Payment Type
Personal Distance
Personal Expense (do not reimburse)

Cancel <<Previous Next>>

End-User Experience

When these JPT specific audit rules are configured, the user is alerted to fix their entries to be able to submit their expense reports.

SAP Concur Expense

Manage Expenses

Home / Expense / Manage Expenses / EntrySave_AuditRule

Alerts: 6

Expense	Japan Public Transportation	06/13/2024	¥7,280
Entry Save : Select different seat type other than reserved. View			
Entry Save : Origintype is route search. Select different origin type. View			
Entry Save : Additional Amount is more than 500 View			
Entry Save : Route is cheap. Please select other. View			
Entry Save : JPT route is fast. Please select other. View			
Entry Save : JPT route is easy. Please select other. View			

EntrySave_AuditRule \$46.43

Not Submitted | Report Number: AP134U

Report Details Print/Share Manage Receipts View Available Receipts

Add Expense Edit Delete Copy Combine Expenses Move to

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
		Cash	Japan Public Transportation		06/13/2024	¥7,280	\$46.43
			Route Details			\$46.43	\$46.43

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.



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

Miscellaneous**Travel and Expense Statement (Reisekostennachweis) for Germany****Overview**

SAP Concur now allows you to print or download Travel and Expense Statement which contains the details of your itinerary and the corresponding travel allowance paid to you. You can access this statement at any stage after creating a new expense report and use it as a proof of your travel and the allowance paid for it.

IMPORTANT: Travel and Expense Statement is only available in English as of now. It is also likely to be available in German in Q3 2024.

End-User Experience

The user can access the statement by opening the completed expense report and then selecting **Print/Share > Travel and Expense Statement**.

Itinerary Overview and **Itinerary Allowance Details** sections of the statement show the itinerary and the travel allowance paid for it, respectively.

Configuration / Feature Activation

Enable the Travel and Expense Statement by following the steps:

1. In **Administration > Expense > Policies**, select the expense policy for which you want to enable the travel and expense statement, then click **Print Formats**.
2. Select **Travel and Expense Statement** and then click **Activate > Done**.



For general information about this functionality, refer to the [Concur Expense: Printed Reports Configuration Setup Guide](#).

Processor Queries

New Expense Processor Search Query Parameter

Overview

As of June 19th, 2024, for processors, a new expense processor search query parameter: **Sent for Payment Date** is included in the custom search query tool. This parameter corresponds to the last step of the workflow for an expense report inside Concur Expense.

For example, an expense report has the "Sent for Payment" date populated when it is either recorded in a Standard Accounting Extract file or when an expense report's status is successfully updated to "Integrated" if the client uses the financial integration service. Using the new parameter, the processor can filter reports.

The update helps improve the search options and the visibility for various auditing tasks and data retention tasks for customers.

Processor Experience

Processors can see a new search query parameter **Sent for Payment Date** that they can then choose when they run a new custom search query in **Expense > Processor (tab) > Process Reports** or **Expense > Process Reports** page.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Reports

Preferred Name for Expense Submitter

Overview

As of May 27-28, 2024, Concur Expense supports preferred names for users submitting expenses. The users can view the preferred name that has been setup for approvers, company attendees, and other elements that display a name field, if the preferred name has been configured for the user.

In Concur Expense, users were always able to set a preferred name for themselves. Now, the SAP Concur displays the preferred names of approvers, company attendees, and other names that an expense submitter will see in the system.

For example, if a user with expense approver permissions has specified a preferred name, this preferred name displays to users submitting expenses, when selecting an approver, or when viewing the timeline for an expense report.

Similarly, if another user in the same company has specified a preferred name in Concur Expense, an expense submitter sees the preferred name when searching for an attendee, and when the user has been added as an attendee to an expense.

This update offers users the flexibility to set up their own preferred names at work, compared to using their given first names and improves user satisfaction.

End-User Experience

The user who is an expense submitter sees the preferred names that is configured for other employees that they interact with in the system, if their locale supports preferred name. This preferred name appears in places where the users may have seen the given name of the employee previously.

The following screens in Concur Expense display the configured preferred name.

REPORT LIBRARY:

The approver's name displays when the report is pending approval or returned to submitter.

Home / Expense / Manage Expenses

Manage Expenses

Report Library

PREF_NAME 05/08/2024 \$260.00 Returned Sent Back (Returned) to Employee Aprov02 Pref NGE	XPR-51418 05/08/2024 \$35.00 Returned Sent Back (Returned) to Employee	Copy: bu 11/28/2023 \$1,745 Returned Sent Back (Returned) to Employee ADMINN nge
attendee test 07/12/2023 \$200.00 Returned	bug bash 07/12/2023 \$100.00 Returned	dev 04/17/2023 ¥1,200 Returned

REPORT PAGE:

The preferred name displays in multiple places inside the report:

- In the comments section for a returned report where the name of the person who adds a comment displays.

SAP Concur Expense ▾

Manage Expenses

Home / Expense / Manage Expenses / Monthly expenses

Report Comment PreferredName Nge: Please update the expenses indicated to the correct cost center and resubmit. Thank you. [View Report Timeline](#)

Monthly expenses \$15.00

- In the **Report Header**, where the report owner's name displays if the field is configured on the form
- Expense entries list
- Expense details

REPORT TIMELINE AND APPROVAL FLOW

- Name of the person who acted (workflow changes - submitted, approved, and so on)
- Name of the approver for a workflow step
- Approver search, if configured.

Report Timeline
PREF_NAME | \$260.00

Approval Flow [Edit](#)

- Manager Approval
- Approver02 NGE
- test
- test1
- test3
- Approval for Processing

Report Summary [Sort ▾](#) [Filter ▾](#)

Report Comment 0/500

Wednesday, May 8, 2024

Status: **Sent Back (Returned) to Employee**
Status Updated: Aprov02 Pref NGE
May 8, 2024 12:27 PM

Report Comment - \$260.00

Aprov02 Pref NGE May 8, 2024 12:27 PM
Return this report

Status: **Submitted**
Status Updated: PREF_JAY Han
May 8, 2024 12:24 PM

Status: **Submitted And Pending Approval**
Status Updated: PREF_JAY Han
May 8, 2024 12:24 PM

Status: **Sent Back (Returned) to Employee**
Status Updated: PREF_JAY Han
May 8, 2024 12:23 PM

Status: **Submitted**
Status Updated: PREF_JAY Han
May 8, 2024 12:22 PM

Status: **Submitted And Pending Approval**
Status Updated: PREF_JAY Han
May 8, 2024 12:22 PM

Expense Comment - Dinner - May 9, 2024 - \$200.00

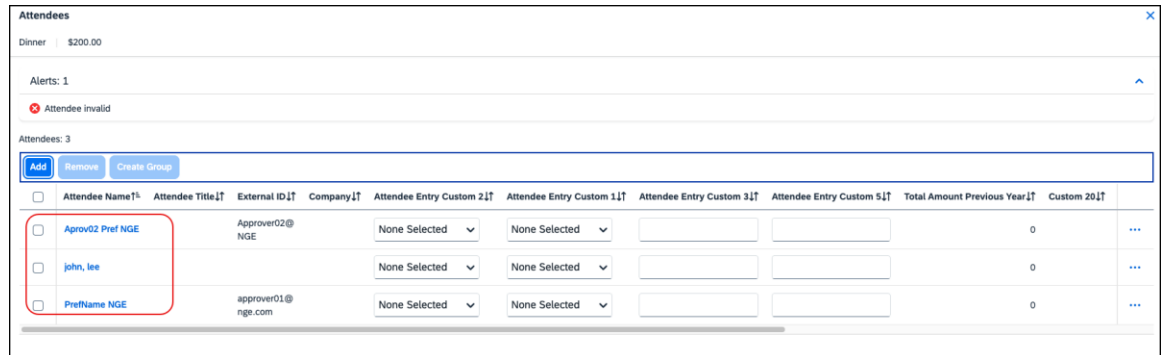
AUDIT TRAIL

Audit trail displays the preferred name of the person who made the change.

EXPENSE ATTENDEES

The preferred name displays only for the system employee attendee type:

- In the list of attendees associated with the expense entry
- Search results
- Attendee detail



Attendee Name	Attendee Title	External ID	Company	Attendee Entry Custom 2	Attendee Entry Custom 1	Attendee Entry Custom 3	Attendee Entry Custom 5	Total Amount Previous Year	Custom 20
Aprov02 Pref NGE		Approver02@NGE		None Selected	None Selected			0	...
John, lee				None Selected	None Selected			0	...
PrefName NGE		approver01@nge.com		None Selected	None Selected			0	...

REPORT PAYMENTS

The preferred name of the report owner who received the payment displays on screen.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.



For further updates related to this feature, visit the [Preferred Name Locale](#) topic in SAP Concur Developer Center.

Travel Allowance Service

Calculate Additional Travel Allowance for Travel outside Working Hours in Austria

Overview

SAP Concur now allows you to calculate additional travel allowance for the time spent in traveling outside of the regular working hours. For this purpose, SAP Concur provides you a new calculation rule titled **Based on time of departure until arrival, excluding duration of stay**. You can configure it as a part of your client rate bundle.

IMPORTANT: This calculation rule is provided for various CLAs (Collaborative Labor Agreements) in Austria and *does not* affect the statutory rate bundles.

The calculation rule considers only the time spent in actual travel, from departure to arrival, and not the time an employee spends at any given location. The rule is applicable for domestic as well as foreign travels. The allowance is calculated in addition to the daily allowance an employee is eligible for.

The rate file given as an example with this calculation rule supports the following rates and calculations; however, they remain fully customizable.

- On weekdays:

For travel outside regular working hours on weekdays, 1/7th of the daily allowance is calculated for each started hour.

- On weekends and public holidays:

For travel outside regular working hours starting from 1 PM on Saturdays, and on Sundays or public holidays, 25% of the daily allowance is calculated for each started hour.

- At nights:

For nighttime travel between 22:00 and 6:00, the calculation for up to 3 hours happens as per one of the rules above. If the travel time crosses 3 hours, full overnight rate is given to the employee.

While configuring this rule in your client rate bundle, you can customize the working hours and the rate per hour based on your need.

SAP Concur recommends setting up a specific rate type called **Travel Times** with **Incidentals** as the rate category and assigning this new calculation rule for **Location for rate determination, domestic** and **Location for rate determination, foreign**.

IMPORTANT: Travel Allowance Service does not currently support salary-based calculation of additional allowance for travel outside working hours.

End-User Experience

While creating an expense report, in the **Adjustments** step, the user will need to use the **Travel Times** drop-down and choose among **Travel time Monday-Friday**, **Travel time Saturday**, or **Travel time Sunday**.

Travel Allowance
Adjustments

Here you can declare any free meals received to reduce your daily allowance. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: **Adjustments** Show Filters

Date/Location	Exclude Day	Travel Times	Overnight	Breakfast	Lunch	Dinner	Reimbursement Amount
All Days Dates: 2	☐	Travel time Monday-Friday	☐	☐	☐	☐	
	☐	Travel time Monday-Friday	☐	☐	☐	☐	1.7500
	☐	Travel time Monday-Friday	☐	☐	☐	☐	1.7500
							Total: 3.5000

Back Finish Cancel

Later in the **Reimbursement Details**, the user will see the additional daily allowance listed separately against the rate type **Travel Times**.

Configuration / Feature Activation

Reach out to your implementation team / partner to configure this calculation rule in your client rate bundle. However, basic steps for configuring the calculation rule into your client rate bundle are as follows:

3. Create a rate type called **Travel Times** with **Incidentals** as the rate category and assign the calculation rule to it.
4. Create meal types as required, for example, additions for Monday to Friday, Saturdays, and Sundays or public holidays.
5. Set up rates by using the example rate file that uses 08:00 to 17:00 as standard working hours, and 1/7th and 25% of the daily allowance for the calculation. Make changes to this if needed.



For more information, refer to [Concur Expense: Travel Allowance Austria Statutory Bundles Setup Guide](#).



For general information about this functionality, refer to the [Concur Expense: Travel Allowance Generic Configurable Bundle Setup Guide](#).

Calculate Total Foreign Travel Time of up to 5 Hours as Domestic in Austria

Overview

SAP Concur now allows you to calculate total travel time of less than or equal to 5 hours (300 minutes) spent in a foreign location as domestic travel. For this purpose, SAP Concur provides you a new calculation rule titled **Used by Austria only – based on border crossing time, handling foreign trip parts totaling up to 5 hours as domestic**. You can configure it as a part of your client rate bundle.

IMPORTANT: This calculation rule is provided for various CLAs (Collaborative Labor Agreements) in Austria and *does not* affect the statutory rate bundles.

The time spent in a foreign location is calculated from border crossing to border crossing. If an itinerary has multiple foreign travels, all of them are added to get the total foreign travel time. If this time is less than or equal to 5 hours, it is added to the domestic part of the itinerary and the daily allowance is calculated as per the domestic rate.

If the total foreign travel time exceeds 5 hours (301 minutes or more), the entire duration is considered as foreign travel and the daily allowance for it is calculated as per the foreign rate.

SAP Concur recommends assigning this new calculation rule for **Location for rate determination, foreign** while configuring it for your client rate bundle.

Configuration / Feature Activation

Reach out to your implementation team / partner to configure this calculation rule in your client rate bundle.



For more information, refer to [Concur Expense: Travel Allowance Austria Statutory Bundles Setup Guide](#).



For general information about this functionality, refer to the [Concur Expense: Travel Allowance Generic Configurable Bundle Setup Guide](#).

Removal of Rate Type "Incidentals" for the Foreign Travels of Polish Employees

Overview

The Polish users of Travel Allowance Service can now no longer see the rate type "incidentals" while creating an expense report for their foreign trips. This change is made by SAP Concur to stay compliant with the local statutory requirements.

The employees can no longer see the split of the daily allowance between "meals" and "incidentals" while creating an expense report for foreign trips. With the removal of the "incidentals" rate type, they can only see one rate type "meals", and the

deductions for any provided meals are calculated on this. However, the employees remain entitled to receive at least 25% of the prorated daily allowance, despite deductions.

End-User Experience

The users can see only one rate type “meals” besides the “lodging” rate type. As a result, there is only one expense entry for meals per day and fewer deviating reimbursement amounts due to rounding off.

Configuration / Feature Activation

For the statutory rate bundle, this feature is automatically available and there are no configuration or activation steps. For changes in the client rate bundle, raise a ticket to the Services.



For more information, refer to the [Concur Expense: Travel Allowance Poland Statutory Bundle Setup Guide](#).

Trip Within a Trip Configuration for Rates

Overview

The Travel Allowance Service (TAS) feature supports the ability for an administrator to configure the rate bundle according to trip within a trip parameter, in addition to trip within a trip configuration in Adjustments.

This feature supports business rules around overlapping trips.

Administrator Experience

The administrator navigates to **Administration > Expense > Travel Allowance Configuration > Rate Bundles** and selects **View Contents** () for the already configured rate bundle.

The administrator next opens (✎) the rate bundle in the **Rate** tab for editing and scrolls to the newly included section **Trip Within the Main Trip** in the **Edit Rate** screen.

These are additional parameters available to the administrator to configure rates for a trip within a trip feature.

The screenshot shows the SAP Concur interface for configuring rate bundles. The top section, titled "Rate Bundles", includes a table with columns: Rate Bundle, Location, Managed By, and Actions. The table lists several bundles, including "ARSEN_NESTED_TRIPS - Nested trips", "TEST_BERND_TRIP_WITHIN_TRIP - Testing trip within trip", and "TWT - Trip within a trip". A red box highlights the "View Contents" icon in the Actions column for the "TWT" bundle, with the annotation "1. Select View Contents for a rate bundle".

Below the table, the "Edit Rate" screen is shown. It has tabs for "Rates", "Deductions", and "Adjustments". The "Rates" tab is active, showing a table with columns: Location, Rate Type, Applicable for, Start - End, Amount, Valid From - To, and Actions. A red box highlights the "Edit" icon in the Actions column, with the annotation "2. Click Edit to update the rate bundle".

At the bottom of the "Edit Rate" screen, there is a new section titled "Trip Within the Main Trip". This section contains several dropdown menus for "Overlap Type", "Main Trip or Trip Within", "Applicable for", and "Trip Destination". A red box highlights this section with the annotation "New section added to the screen".

Configuration / Feature Activation

This feature can be configured by the Travel Allowance Configuration administrator or SAP Concur personnel.

Verify

Incorrect Amount Check for Overspend Claim (June 17-18)

Overview

Released between June 17 – June 18, Concur Verify has introduced a new **Amount overspend** checkbox in the **Incorrect Amount** check. This will identify an overspend where the report amount exceeds the receipt amount.

For existing configurations, the **Amount mismatch** remains the default setting for the **Incorrect Amount** check. Administrators need to adjust this if they wish to check for overspend.

For new configurations, the **Amount overspend** is the default setting for the **Incorrect Amount** check, unless adjusted by the administrator.

Administrator Experience

To enable the **Amount overspend** check, navigate to **Audit Profile > Check Details**. In the **Check Name** dropdown box, select **Incorrect Amount**. For the **Claim Amount Parameter** field, select **Amount overspend**.

If the **Amount overspend** is not enabled, then the existing **Incorrect Amount** checks will be defaulted to **Amount mismatch** and new checks is defaulted to **Amount overspend** only.

SAP Concur

Product Settings > Verify Audit Profiles > Audit Profile > Check Details

Check Details

Check Name

Incorrect Amount

Description

We review the receipt and attempt to determine the amount and currency. Exceptions will be raised if the amounts don't match or if the report amount exceeds the receipt. This can be configured using the claim amount parameters. The allowable discrepancy between the receipt and the expense report is also configurable.

Conditions

Amount Trigger

5

Expense Type Trigger

All

Select Expense Ty

Claim Amount Parameter

Amount mismatch

Amount overspend

Allowable Discrepancy Amount

Quick Help

The amount mismatch occurs when the receipt amount doesn't match the expense report amount. The amount overspend happens when the expense report amount exceeds the receipt amount.

Currency

US, Dollar (USD)

Auditor Responses

Add Auditor Response

Status Type	Auditor Response	Comment to Employee	Actions
Pass	Incorrect Exception		
Fail	Out of policy	The amount on the receipt is missing, incomplete, or does not match the amount of the expense. Please enter the correct amount or mark the rem...	
Pass	Approve with Exception	Approved with exception: Incorrect amount identified	

Save

Save and Add Another

Cancel

THE BEST RUN

SAP

SAP Concur

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Attendees

****Planned Changes** Adding Attendees in Bulk**

Information First Published	Information Last Modified	Feature Target Release Date
June 14, 2024	--	June 24 – 25, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

In an upcoming release, Concur Expense users will be able to add multiple attendees to an expense report in bulk by simply copying and pasting the employees' email addresses into the application. This feature only works for employees (internal attendees) and is not available for other types of attendees.

Currently, the system supports bulk attendee upload, and this can be performed using attendee import through a spreadsheet.

This update will help reduce time and effort for an expense user while adding multiple attendees for a report, without the creation of duplicate attendee records.

End-User Experience

When users want to add multiple attendees to an expense report, they will open the **Add Attendees** dialog and select **Employee** in the **Attendee Type** list on the **Search Attendees** tab.

They will now see a new button **Import Corporate Email Addresses** display on the screen. Next, they will copy and paste the email addresses of all the employees that are attendees for the expense entry and click **Next**.

The screenshot displays the 'Add Attendees' interface in SAP Concur. The top section, titled 'Add Attendees', includes tabs for 'Search Attendees', 'Recent Attendees', 'Attendee Groups', and 'No Shows'. Under 'Search Criteria', there are input fields for 'Attendee Type' (set to 'Employee'), 'First Name', 'Last Name', 'Preferred Name', 'Email', 'Company', and 'Custom Field 1'. A red box highlights the 'Import Corporate Email Addresses' button, which is located below the search criteria. A red arrow points from this button to the 'Import Corporate Email Addresses' screen below. This screen has a title bar with a back arrow and the text 'Import Corporate Email Addresses'. It contains instructions: 'Paste up to 100 corporate email addresses separated by spaces, commas, or any special characters to import as attendees.' Below this is a large text area labeled 'Email Addresses' containing a list of email addresses in the format 'Name <email>'. To the right of the text area are 'Add' and 'Remove' buttons. At the bottom right, there are 'Next', 'Cancel', 'OK', and 'Cancel' buttons.

Add Attendees

Search Attendees Recent Attendees Attendee Groups No Shows

Search Criteria

Attendee Type First Name Last Name Preferred Name

Employee

Email Company Custom Field 1

Reset Search

Import Corporate Email Addresses

Paste up to 100 corporate email addresses separated by spaces, commas, or any special characters to import as attendees.

Email Addresses

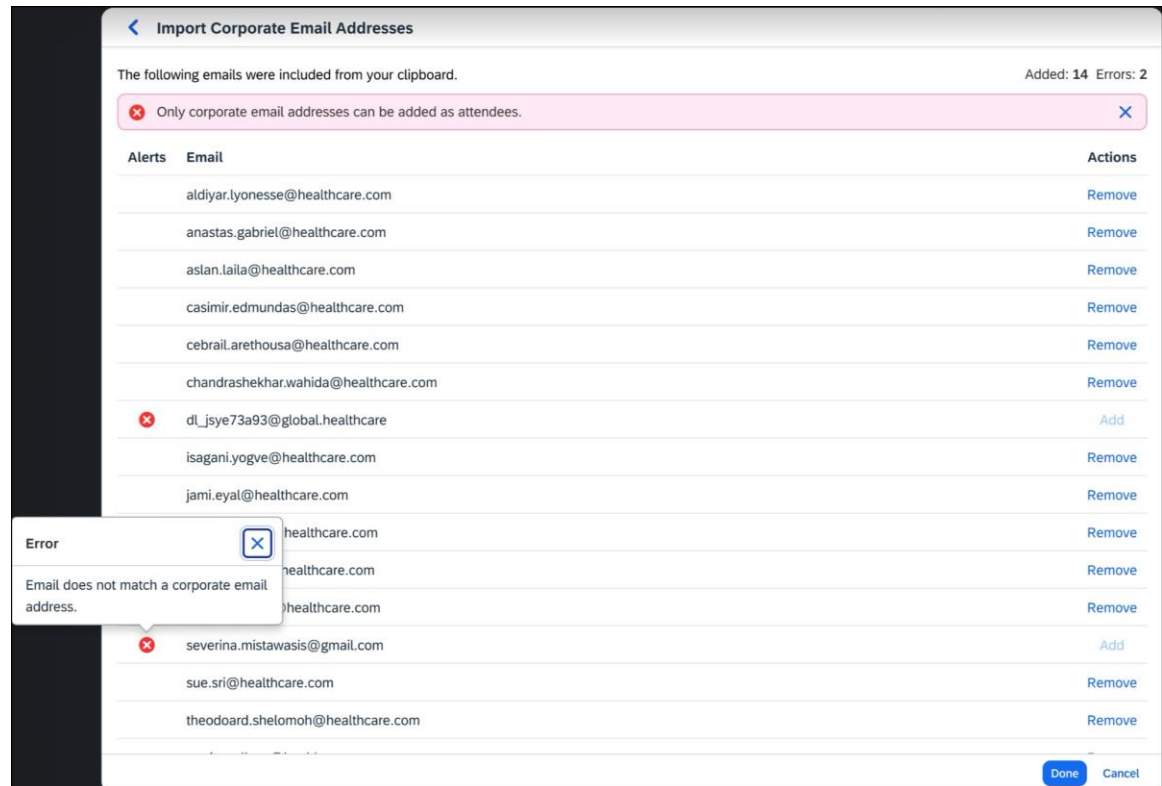
Cassiday, Lukas <lukas.cassidy@healthcare.com>; Cassiday, Lukas <lukas.cassidy@healthcare.com>; Shelomoh, Theodard <theodard.shelomoh@healthcare.com>; DL Healthcare <dl_jsye73a93@global.healthcare.com>; Sri, Sue <sue.sri@healthcare.com>; Lyonesse, Aldiyar <alldiyar.lyonesse@healthcare.com>; Wahida, Chandrashekhar <chandrashekhar.wahida@healthcare.com>; Laertes, Tiw <tiw.laertes@healthcare.com>; Gabriel, Anastas <anastas.gabriel@healthcare.com>; Mistawasis, Severina <severina.mistawasis@healthcare.com>; Sidony, Laetitia <laetitia.sidony@healthcare.com>; Eyal, Jami <jami.eyal@healthcare.com>; Yogve, Isagani <isagani.yogve@healthcare.com>; Lyonesse, Aldiyar <alldiyar.lyonesse@healthcare.com>; Edmundas, Casimir <casimir.edmundas@healthcare.com>; Arethousa, Cebrail <cebrail.arethousa@healthcare.com>; Rachael, Marco <marco.rachael@healthcare.com>; Wallace, Mario <mario.wallace@healthcare.com>; jerrysmithhealthcarecom

Add Remove

Next Cancel OK Cancel

The attendees will be added to the expense entry in bulk. To finish, they will click **Done** and exit the screen.

NOTE: Concur Expense will only allow employees who have their email addresses listed in the system to be included as attendees.



Configuration / Feature Activation

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

Expense

****Planned Changes** Expense Integration with Microsoft Teams**

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	--	Q3 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for a future release, Concur Expense will integrate with Microsoft (MS) Teams. This integration will allow users to collaborate on Concur Expense tasks without leaving MS Teams.

End-User Experience

Once MS Teams is enabled for an organization, the SAP Concur app can be added to the user's MS Teams. Once within the SAP Concur app within MS Teams, the user can type search terms such as "Expense" or "Expense Approvals" to retrieve entire reports. A list with the latest five active reports will appear.

Expense reports will be available to view in MS Teams or to be shared with an approver in a chat.

Approvers will be able to search expense reports from their approval queue. A list with the latest five active reports will appear. Approvers will be able to approve or reject reports from within MS Teams.

Configuration / Feature Activation

This feature is enabled by default. There are no configuration steps.

Itemizations

****Planned Changes**** Recurring Itemizations in Expenses

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	June 14, 2024	June 24-25, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

In an upcoming release, the multiple itemization recurrence options in Concur Expense will be combined into a single, user-friendly drop-down menu, from which the user can select the recurrence frequency.

This change is applicable to all expense types where there is a possibility for recurrence of itemizations.

For example, when the user has entered all details pertaining to the hotel, the user will need to itemize their hotel expenses. The user will now see this user friendly drop-down list within the nightly lodging wizard for hotel expenses.

This feature will allow the user to create multiple expense entries during the itemization process, as well as provide the same amount per day, or different amounts each day.

This change will make the recurrence checkbox more discoverable and will reduce complexity in creating itemization for expenses. The users will be able to efficiently manage their itemized expenses in a shorter time with a better streamlined process.

End-User Experience

On the **Itemizations** tab in Concur Expense, the field **Entry Type > Recurring Itemization** will be replaced with a new **Recurrence** drop-down list. After the **Expense Type** is selected, the user will now choose an option from the **Recurrence** drop-down list. This change applies to all expense types where there is a **Recurrence** checkbox.

For example, if the user selects the expense type **Hotel**, the updated screens will display as follows:

Hotel \$500.00
01/17/2024 | Allstar Hotels

Details | **Itemizations**

Amount \$500.00 | Itemized \$0.00 | Remaining \$500.00

New Itemization

Expense Type *
Hotel

Entry Type:
Recurring Itemization

04/01/2024 - 04/12/2024 (Nights: 11)

Your hotel room rate was:

The Same Every Night | Not the Same

Room Rate (per night)* | Room Tax (per night) | Tax 2 (per night) | Tax 3 (per night)

(Amounts in USD) | Add Tax Fields

Save Itemization | Save and Add Another | Cancel

Expense Type *
Hotel

Recurrence *
Choose recurrence
Not recurring
Same daily amount
Different daily amount

For the **Hotel** expense type, the current UI contains the options **The Same Every Night** and **Not the Same**. This will be updated to display the selections **Same Daily Amount** and **Different Daily Amount** as follows:

Example: Same Daily Amount Screen

DetailsItemizations

Total Amount602.50 USDItemized550.00 USDRemaining52.50 USD

New Itemization

Allocate

* Required Field

Expense Type *

Hotel

Recurrence *

Same daily amount

Nights: 2

Date	Room Rate *	Room Tax
11/11/2024	250.00	25.00
11/12/2024	250.00	25.00

Add Tax Fields

Business Purpose

Vendor *Tree Plaza Hotel

☐ Personal Expense (do not reimburse)

Example: Different Daily Amount Screen

DetailsItemizations

Amount\$33.00Itemized\$60.00Over\$27.00

New Itemization

* Required field

Expense Types *

Hotel

Recurrence *

Different daily amount

Nights: 2

Date	Room Rate *	Room Tax	Tax 2	Tax 3
04/18/2024				
04/19/2024				

(Amounts in USD)Add Tax Fields

☐ Combine room rate and taxes into a single entry

Save Itemization

Save and Add Another

Cancel

For the **Non-Hotel** Itemization expense types, the user will now choose an option from the **Recurrence** drop-down list.

The screenshot shows the 'New Itemization' form. At the top, there are tabs for 'Details' and 'Itemizations'. Below the tabs, there are three summary boxes: 'Amount' (¥10,000), 'Itemized' (¥0), and 'Remaining' (¥10,000). The main section is titled 'New Itemization' and contains two required fields: 'Expense Types *' and 'Recurrence *'. The 'Expense Types' dropdown is currently set to 'Fuel'. The 'Recurrence' dropdown is currently set to 'Choose recurrence'. A red box highlights these two fields. At the bottom, there are three buttons: 'Save Itemization', 'Save and Add Another', and 'Cancel'.

Once the user selects a recurrence option, the updated screens will display as follows:

The screenshot shows the 'New Itemization' form with the 'Recurrence' dropdown menu open. The dropdown menu is highlighted with a red box and shows the option 'Same daily amount'. Below the dropdown, there are fields for 'Nights: 2', 'Transaction Date' (06/12/2024 and 06/13/2024), 'Amount in JPY *', 'Tax Posted Amount', and 'Personal Expense (no reimbursement) *' (set to 'No'). At the bottom, there are three buttons: 'Save Itemization', 'Save and Add Another', and 'Cancel'.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Mileage (Legacy and Service)

****Planned Changes** New Vehicle Types Added to Conform to Carbon Dioxide (CO2) Netherlands Regulatory Requirements**

Information First Published	Information Last Modified	Feature Target Release Date
June 2024	--	July 1, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for July 1st, 2024, SAP Concur will update the Mileage Configuration tool in both the Legacy and Service versions to include new vehicle types for the

Netherlands. The purpose of this update is to provide updated vehicle criteria to the client that conforms to new country-wide regulations requiring companies to report the total carbon dioxide (CO2) consumption on an annual schedule.

This feature will support the client's need to report the annual total consumption of CO2 across their fleet of vehicles used to conduct business.

Administrator Experience

The Expense administrator will act based on the Mileage version they are using:

- **Legacy:** The Expense administrator must ensure the client has the **Car Type** field set to **Personal Car – Variable Rates** option.

Next the administrator must create a new Custom List of Vehicle Types for the Netherlands. Before creation of this list, first confirm which vehicle type values the customers would like their users to select from, as not all the types may be necessary.

Dutch	English
Fiets (niet OV-fiets)	Bike (not public transport bike)
Auto, brandstof benzine	Car, fuel gasoline
Auto, brandstof diesel	Car, fuel diesel
Auto, brandstof (plug in) hybride	Car, fuel (plug in) hybrid
Auto, brandstof overige	Car, fuel other
Auto, 100% elektrisch	Car, 100% electric
Motorfiets, brandstof benzine	Motorcycle, fuel gasoline
Motorfiets, 100% elektrisch	Motorcycle, 100% electric
Scooter/Bromfiets, brandstof benzine	Scooter/Moped, fuel gasoline
Scooter/Bromfiets, 100% elektrisch	Scooter/Moped, 100% electric

Add a field to the **Car Entry Form** called **Vehicle Type** (custom 1) and link it to this new list of vehicle types.

Finally, a Cognos Intelligence Report will likely need to be created according to the clients requirement.



For additional information, visit the [Reporting obligation work-related personal mobility \(rvo.nl\)](https://www.rvo.nl/en/reports-and-publications/reporting-obligation-work-related-personal-mobility) website.

- **Service:** The new rates are automatically available, and the administrator will need to alert their end-users to adopt the new vehicle types based on the Personal car and vehicle type it matches.

Mileage Configuration

Country/Region: Netherlands

Add Country/Region

Rates: Automatic Rates

Select Group

Mileage Rate Applied to Group: Global

Personal Car | Company Car

☐ Show Historic Rates

Save

Effective Date	Rate
01/01/2024	0.22
01/01/2023	0.21

Finally, a Cognos Intelligence Report will need to be created later this year as the Cognos report solution needs to have this vehicle type being ingested into the solution.

End-User Experience

When the Mileage administrator has confirmed and performed any configuration, the end-user applies the updated vehicle types based on the Mileage version they are using:

- **Legacy:** The end-user will next select the specific vehicle type listed in the **Custom List of Vehicle Types** into the car registration form that has been created by their administrator and save this configuration.

Car Registration

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.

Reimbursement Method: Personal Car - Variable Rates

New **Remove**

Vehicle ID: TEST

Type of Reimbursement: Nobian Employee

Fuel Type: Car - Diesel

☐ Preferred Car

Save **Cancel**

☐ Vehicle ID

No cars found for this configuration

Active

- **Service:** The new rates are available as options when opening the end-user's **Profile Settings > Vehicle Configuration** view.

SAP Concur

[Back](#)

Vehicle Configuration

You can use this page to register and manage vehicles for mileage expenses. To submit a mileage expense successfully, it is necessary to register at least one vehicle.

Description *

car

Ownership *

Personal

Vehicle Type *

- ✓ Car - Diesel
- Car - Electric
- Car - Gasoline
- Car - Gasoline Hybrid
- Car - Other
- Cycle
- Moped - Electric
- Moped - Gasoline
- Motorcycle - Electric
- Motorcycle - Gasoline

The end-user must update their existing car configuration to match the choices, based on CV criteria, or choose the correct criteria when creating their new car configuration.

If the user does not update their existing car configuration with a new vehicle type, then an error will be displayed upon submission of an expense report.

Configuration / Feature Activation

The administrator will need to confirm and configure vehicle types as explained in this release note, and the end-user will need to match the vehicle criteria to the new or existing car(s) they are using for business travel.



For more information, refer to *Concur Expense: Mileage Service Setup Guide*.

Travel Allowance Service

Planned Changes Default Travel Itinerary from Travel Plan

Information First Published	Information Last Modified	Feature Target Release Date
June 14, 2024	--	June 30, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

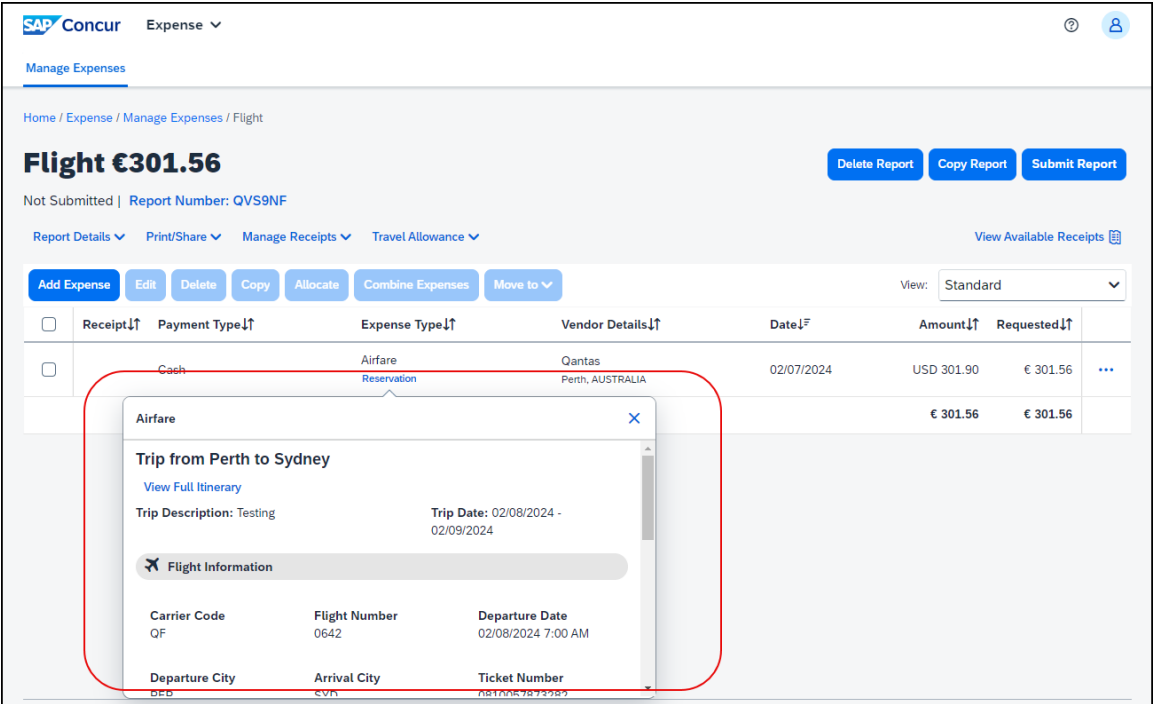
In Concur Expense, when the user creates a travel allowance itinerary for an expense report based on a travel booking linked to the expense report, the expense type and travel details such as travel dates and destinations, are automatically populated from the travel booking.

This feature is set to be released sometime in the end of June 2024 and will help the users save time on creating an expense report since they do not have to enter their travel details again.

End-User Experience

When the user creates an expense report from a travel booking done in Concur Travel, an expense type with booking information will be included automatically into the expense report.

For example, in the image below, there is an expense type added automatically into an expense report resulting from the flight booking in Concur Travel.



When a travel itinerary is added for this expense, the travel allowance itinerary is auto populated with the travel dates and destinations from the associated travel booking done in Concur travel.

SAP Concur Expense

Manage Expenses

Home / Expense / Manage Expenses / Flight

Flight €301.56

Not Submitted | Report Number: QVS9NF

Report Details | Print/Share | Manage Receipts | Travel Allowance

View Available Receipts

Add Expense | Edit | Delete | Copy | Allocate | Add Travel Allowance | View to

View: Standard

	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested	
☐		Cash	Airfare Reservation	Qantas Perth, AUSTRALIA	02/07/2024	USD 301.90 € 301.56	€ 301.56	...
						€ 301.56	€ 301.56	

Travel Allowance

Itinerary

Itinerary Name *
Flight

Detailed Itinerary

Without overnight

Allowance Category *
Company

Start Location *
Perth, AUSTRALIA

Start Date *
08/02/2024

Start Time *
7:00 AM

+ Add Destination

Arrival Location *
Sydney, AUSTRALIA

+ Add Destination

End Location *
Perth, AUSTRALIA

End Date *
08/07/2024

End Time *
6:00 AM

Next: Adjust your travel allowance

Next

Cancel

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

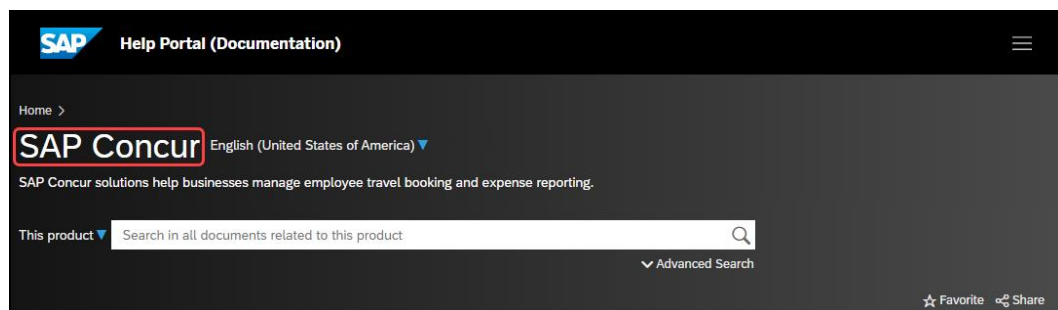
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

▶ ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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SAP Concur Release Notes Concur Expense Professional / Premium	
Month	Audience
Release Date: July 2024 Initial Post: July 19, 2024	Client FINAL

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Release Notes

This document contains the release notes for Concur Expense professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Attendees

Adding Attendees in Bulk

Overview

In the current release, Concur Expense users can add multiple attendees to an expense report in bulk by simply copying and pasting the employees' email addresses into the application. This feature only works for employees (internal attendees) and is not available for other types of attendees.

Currently, the system supports bulk attendee upload, and this can be performed using attendee import through a spreadsheet.

This update helps reduce time and effort for an expense user while adding multiple attendees for a report, without the creation of duplicate attendee records.

End-User Experience

When users want to add multiple attendees to an expense report, they open the **Add Attendees** dialog and select **Employee** in the **Attendee Type** list on the **Search Attendees** tab.

They now see a new button **Import Corporate Email Addresses** displayed on the screen. Next, they copy and paste the email addresses of all the employees that are attendees for the expense entry and click **Next**.

The screenshot displays the 'Add Attendees' dialog with the 'Search Attendees' tab selected. The 'Attendee Type' dropdown is set to 'Employee'. The 'Import Corporate Email Addresses' button is highlighted with a red box and a red arrow pointing to it. Below the dialog, the 'Import Corporate Email Addresses' screen is shown, featuring a text area with a list of email addresses and names, and a 'Next' button at the bottom right.

Add Attendees

Search Attendees Recent Attendees Attendee Groups No Shows

Search Criteria

Attendee Type: Employee (dropdown)

First Name: [text input]

Last Name: [text input]

Preferred Name: [text input]

Email: [text input]

Company: [text input]

Custom Field 1: [text input]

Reset Search

Import Corporate Email Addresses

Paste up to 100 corporate email addresses separated by spaces, commas, or any special characters to import as attendees.

Email Addresses

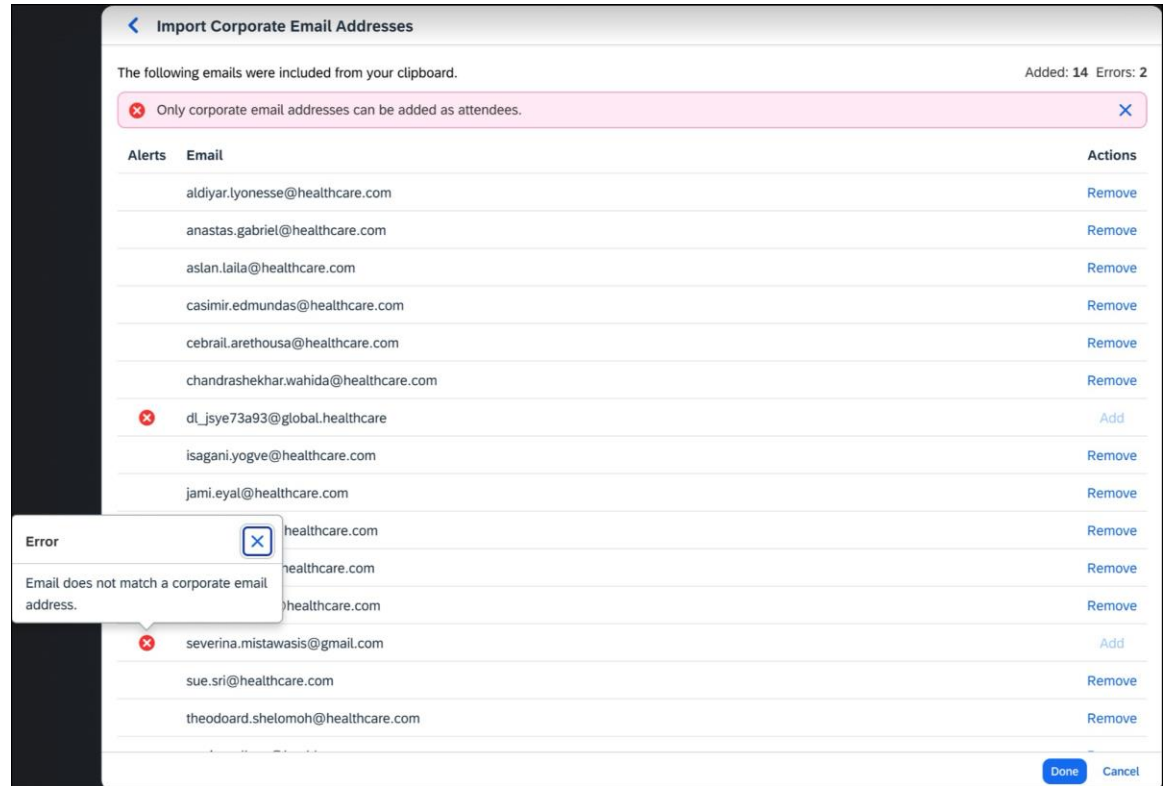
Cassiday, Lukas <lukas.cassidy@healthcare.com>; Cassiday, Lukas <lukas.cassidy@healthcare.com>; Shelomoh, Theodard <theodard.shelomoh@healthcare.com>; DL Healthcare <dl_jsye73a93@global.healthcare.com>; Sri, Sue <sue.sri@healthcare.com>; Lyonesse, Aldiyar <alldiyar.lyonesse@healthcare.com>; Wahida, Chandrashekhar <chandrashekhar.wahida@healthcare.com>; Laertes, Tiw <tiw.laertes@healthcare.com>; Gabriel, Anastas <anastas.gabriel@healthcare.com>; Mistawasis, Severina <severina.mistawasis@healthcare.com>; Sidony, Laetitia <laetitia.sidony@healthcare.com>; Eyal, Jami <jami.eyal@healthcare.com>; Yogve, Isagani <isagani.yogve@healthcare.com>; Lyonesse, Aldiyar <alldiyar.lyonesse@healthcare.com>; Edmundas, Casimir <casimir.edmundas@healthcare.com>; Arethousa, Cebrail <cebrail.arethousa@healthcare.com>; Rachael, Marco <marco.rachael@healthcare.com>; Wallace, Mario <mario.wallace@healthcare.com>; jerrysmithhealthcarecom

Add Remove

Next Cancel OK Cancel

The attendees are added to the expense entry in bulk. To finish, they click **Done** and exit the screen.

NOTE: Concur Expense only allows employees who have their email addresses listed in the system to be included as attendees.



Configuration / Feature Activation

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

Itemizations

Recurring Itemizations in Expenses

Overview

In the current release, the multiple itemization recurrence options in Concur Expense are combined into a single, user-friendly drop-down menu, from which the user can select the recurrence frequency.

This change applies to all expense types where there is a possibility for recurrence of itemizations.

For example, when the user enters all details pertaining to the hotel, the user needs to itemize their hotel expenses. The user now sees this user friendly drop-down list within the nightly lodging wizard for hotel expenses.

This feature allows the user to create multiple expense entries during the itemization process, as well as provide the same amount per day, or different amounts each day.

This change makes the recurrence checkbox more discoverable and reduces complexity in creating itemization for expenses. The users are able to efficiently manage their itemized expenses in a shorter time with a better streamlined process.

End-User Experience

On the **Itemizations** tab in Concur Expense, the **field Entry Type > Recurring Itemization** is replaced with a new **Recurrence** drop-down list. After the **Expense Type** is selected, the user now chooses an option from the **Recurrence** drop-down list. This change applies to all expense types where there is a **Recurrence** checkbox.

For example, if the user selects the expense type **Hotel**, the updated screens display as follows:

Hotel \$500.00
01/17/2024 | Allstar Hotels

Details | **Itemizations**

Amount \$500.00 | Itemized \$0.00 | Remaining \$500.00

New Itemization

Expense Type *
Hotel

Entry Type:
Recurring Itemization

04/01/2024 - 04/12/2024 (Nights: 11)

Your hotel room rate was:

The Same Every Night | Not the Same

Room Rate (per night)* | Room Tax (per night) | Tax 2 (per night) | Tax 3 (per night)

(Amounts in USD) | [Add Tax Fields](#)

[Save Itemization](#) [Save and Add Another](#) [Cancel](#)

For the **Hotel** expense type, the current UI contains the options **The Same Every Night** and **Not the Same**. This is updated to display the selections **Same Daily Amount** and **Different Daily Amount** as follows:

Example: Same Daily Amount Screen

The screenshot shows the 'New Itemization' form for a 'Hotel' expense type. The 'Recurrence' dropdown is set to 'Same daily amount'. Below this, a table shows the room rate and tax for two nights (11/11/2024 and 11/12/2024). The room rate is 250.00 and the room tax is 25.00 for both nights. The form also includes fields for 'Business Purpose' and 'Vendor' (Tree Plaza Hotel). A red box highlights the 'Recurrence' dropdown and the table.

Date	Room Rate *	Room Tax
11/11/2024	250.00	25.00
11/12/2024	250.00	25.00

Example: Different Daily Amount Screen

The screenshot shows the 'New Itemization' form for a 'Hotel' expense type. The 'Recurrence' dropdown is set to 'Different daily amount'. Below this, a table shows the room rate and tax for two nights (04/18/2024 and 04/19/2024). The room rate is 250.00 and the room tax is 25.00 for both nights. The form also includes fields for 'Business Purpose' and 'Vendor' (Tree Plaza Hotel). A red box highlights the 'Recurrence' dropdown and the table.

Date	Room Rate *	Room Tax	Tax 2	Tax 3
04/18/2024				
04/19/2024				

(Amounts in USD)

For the **Non-Hotel** Itemization expense types, the user now chooses an option from the **Recurrence** drop-down list.

The screenshot shows the 'Itemizations' tab in the SAP Concur interface. At the top, there are summary fields: 'Amount' (¥10,000), 'Itemized' (¥0), and 'Remaining' (¥10,000). Below this is the 'New Itemization' section. It contains two dropdown menus: 'Expense Types' (set to 'Fuel') and 'Recurrence' (set to 'Choose recurrence'). A red box highlights the 'Recurrence' dropdown. At the bottom, there are three buttons: 'Save Itemization', 'Save and Add Another', and 'Cancel'.

Once the user selects a recurrence option, the updated screens display as follows:

This screenshot shows the 'New Itemization' form after a recurrence option has been selected. The 'Expense Types' dropdown remains 'Fuel'. The 'Recurrence' dropdown is now set to 'Same daily amount'. Below this, there is a 'Nights' field set to '2'. The 'Transaction Date' field is set to '06/12/2024'. The 'Amount in JPY' field is empty. The 'Tax Posted Amount' field is empty. The 'Personal Expense (no reimbursement)' dropdown is set to 'No'. A red box highlights the 'Recurrence' dropdown and the 'Nights' field. The bottom buttons remain 'Save Itemization', 'Save and Add Another', and 'Cancel'.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Mileage (Legacy and Service)

New Vehicle Types Added to Conform to Carbon Dioxide (CO2) Netherlands Regulatory Requirements

Overview

As of July 1st, 2024, SAP Concur has updated the Mileage Configuration tool in both the Legacy and Service versions to include new vehicle types for the Netherlands. The purpose of this update is to provide updated vehicle criteria to the client that conforms to new country-wide regulations requiring companies to report the total carbon dioxide (CO2) consumption on an annual schedule.

This feature supports the client's need to report the annual total consumption of CO2 across their fleet of vehicles used to conduct business.

Administrator Experience

The Expense administrator acts based on the Mileage version they are using:

- **Legacy:** The Expense administrator must ensure the client has the **Car Type** field set to **Personal Car – Variable Rates** option.

Next the administrator must create a new Custom List of Vehicle Types for the Netherlands. Before creation of this list, first confirm which vehicle type values the customers would like their users to select from, as not all the types may be necessary.

Dutch	English
Fiets (niet OV-fiets)	Bike (not public transport bike)
Auto, brandstof benzine	Car, fuel gasoline
Auto, brandstof diesel	Car, fuel diesel
Auto, brandstof (plug in) hybride	Car, fuel (plug in) hybrid
Auto, brandstof overige	Car, fuel other
Auto, 100% elektrisch	Car, 100% electric
Motorfiets, brandstof benzine	Motorcycle, fuel gasoline
Motorfiets, 100% elektrisch	Motorcycle, 100% electric
Scooter/Bromfiets, brandstof benzine	Scooter/Moped, fuel gasoline
Scooter/Bromfiets, 100% elektrisch	Scooter/Moped, 100% electric

Add a field to the **Car Entry Form** called **Vehicle Type** (custom 1) and link it to this new list of vehicle types.

Finally, a Cognos Intelligence Report will likely need to be created according to the clients requirement.



For additional information, visit the [Reporting obligation work-related personal mobility \(rvo.nl\)](https://www.rvo.nl/en/reports-and-publications/reporting-obligation-work-related-personal-mobility) website.

- **Service:** The new rates are automatically available, and the administrator will need to alert their end-users to adopt the new vehicle types based on the Personal car and vehicle type it matches.

Country/Region: Netherlands Add Country/Region

Rates: Automatic Rates Select Group Mileage Rate Applied to Group: Global

Personal Car Company Car

☐ Show Historic Rates Save

Effective Date	Criteria	Rate	Personal Rate
01/01/2024	Car - Gasoline Hybrid	0	0
01/01/2024	Moped - Gasoline	0	0
01/01/2024	Car - Other	0	0
01/01/2024	Car - Diesel	0	0
01/01/2024	Cycle	0	0
01/01/2024	Moped - Electric	0	0

Country/Region: Netherlands Add Country/Region

Rates: Custom Rates Select Group Mileage Rate Applied to Group: Global

Personal Car Company Car

☐ Show Historic Rates Save

New Remove

Effective Date	Criteria	Rate
☐ 01/01/2024 	Car - Diesel	0.23
☐ 01/01/2024 	Motorcycle - Gasoline	0.23
☐ 01/01/2024 	Car - Gasoline	0.23
☐ 01/01/2024 	Moped - Electric	0.23

Finally, a Cognos Intelligence Report will need to be created later this year as the Cognos report solution needs to have this vehicle type being ingested into the solution.

End-User Experience

When the Mileage administrator has confirmed and performed any configuration, the end-user applies the updated vehicle types based on the Mileage version they are using:

- **Legacy:** The end-user selects the specific vehicle type listed in the **Custom List of Vehicle Types** into the car registration form that has been created by their administrator and save this configuration.

Car Registration

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.
Reimbursement Method: Personal Car - Variable Rates

New **Remove**

Vehicle ID: Type of Reimbursement: Fuel Type:

☐ Preferred Car

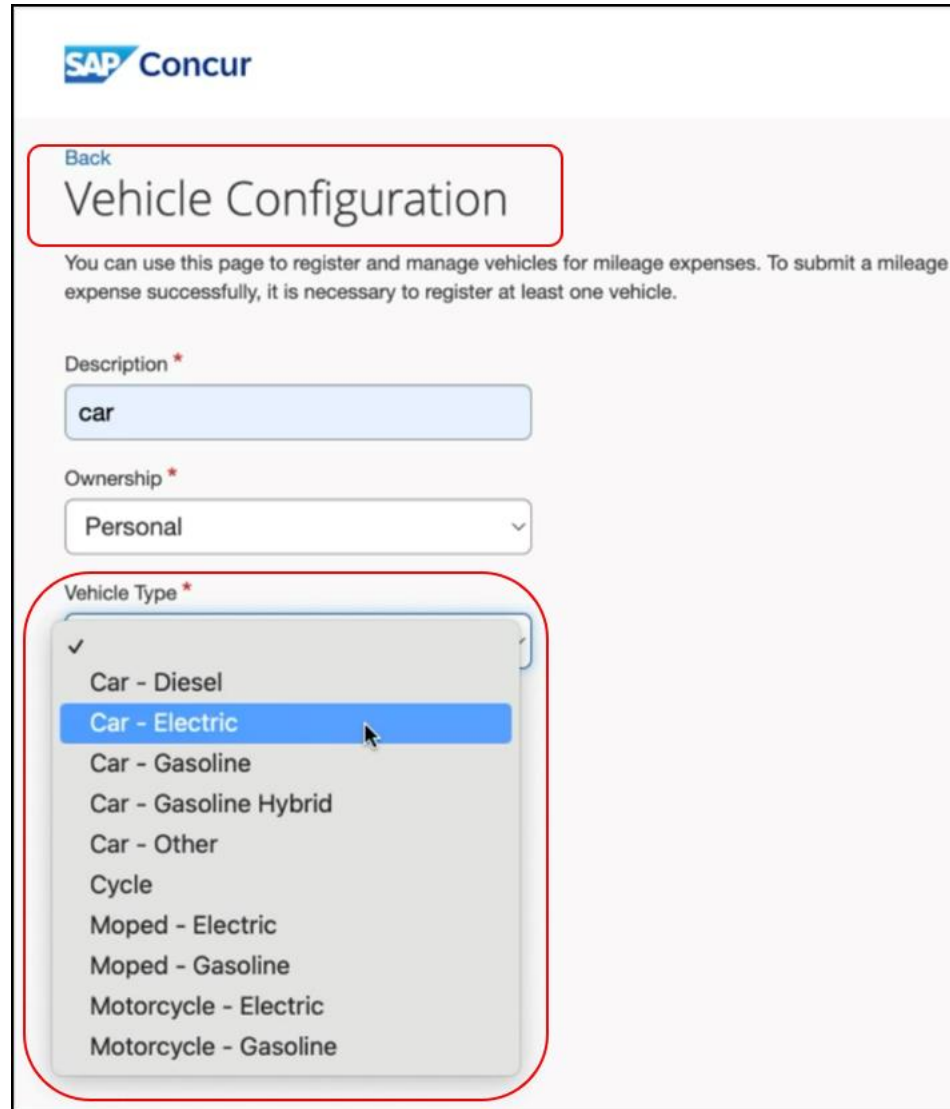
Save **Cancel**

☐ Vehicle ID type of reimbursement

Active

No cars found for this configuration

- **Service:** The new rates are available as options when opening the end-user's **Profile Settings > Vehicle Configuration** view.



The end-user must update their existing car configuration to match the choices, based on CV criteria, or choose the correct criteria when creating their new car configuration.

If the user does not update their existing car configuration with a new vehicle type, then an error will be displayed upon submission of an expense report.

Configuration / Feature Activation

The administrator needs to confirm and configure vehicle types as explained in this release note, and the end-user needs to match the vehicle criteria to the new or existing car(s) they are using for business travel.



For more information, refer to *Concur Expense: Mileage Service Setup Guide*.

Processor Queries

New Expense Processor Search Query Parameter

Overview

As of July 8th, 2024, for processors, a new expense processor search query parameter: **Paid Date** is included in the custom search query tool. This parameter corresponds to the last step of the workflow for an expense report inside Concur Expense.

For example, an expense report has the "Paid Date" date populated when it is either recorded in a Standard Accounting Extract file or when an expense report's status is successfully updated to "Integrated" if the client uses the financial integration service. Using the new parameter, the processor can filter reports.

The update helps improve the search options and the visibility for various auditing tasks and data retention tasks for customers.

Processor Experience

Processors can see a new search query parameter **Paid Date** that they can then choose when they run a new custom search query in **Expense > Processor** (tab) > **Process Reports** or **Expense > Process Reports** page.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Travel Allowance Service

Default Start and End Location Based on the Home Address in the User Profile

Overview

In Concur Expense, when the user creates a travel allowance itinerary for an expense report, the system retrieves the home address previously saved by the user in their user profile as the default start and end locations in the itinerary.

This feature helps speed up the data entry process for the users and, thereby, helps save time on creating an expense report.

End-User Experience

When the user creates a travel allowance itinerary, the **Start Location** and the **End Location** is populated by default from the address filled out by the user in the **Home Address** fields in the **User Profile**.

For example, if the user has filled out Heidelberg, Germany, as their **Home Address** in the **User Profile**, the system picks the home address as the default **Start Location** and **End Location**.

The screenshot displays the 'Travel Allowance' form with the 'Itinerary' tab selected. The 'Home Address' section is shown as a modal or overlay, containing fields for Street (Uferstrasse 3), City (Heidelberg), State/Province, Postal Code (69126), and Country/Region (Germany). A red box highlights this section. In the main form, the 'Start Location' and 'End Location' dropdowns are both set to 'Heidelberg, Baden-Württemberg', highlighted with red boxes. Red arrows point from the 'City' field in the 'Home Address' section to these two location fields. Other fields include 'Itinerary Name', 'Default location', 'Allowance Category' (Germany Statutory), 'Start Date', 'Start Time', 'Arrival Location', 'Street and House No.', 'Postal Code', and 'End Date'.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Default Travel Itinerary from Travel Plan

Overview

In Concur Expense, when the user creates a travel allowance itinerary for an expense report based on a travel booking linked to the expense report, the expense type and travel details such as travel dates and destinations, are automatically populated from the travel booking.

This feature is released and helps the users save time on creating an expense report since they do not have to enter their travel details again.

End-User Experience

When the user creates an expense report from a travel booking done in Concur Travel, an expense type with booking information is included automatically into the expense report.

For example, in the image below, there is an expense type added automatically into an expense report resulting from the flight booking in Concur Travel.

The screenshot shows the SAP Concur Expense report interface. The main header displays "Flight €301.56" and "Report Number: QVS9NF". Below the header, there are buttons for "Delete Report", "Copy Report", and "Submit Report". The "Travel Allowance" dropdown menu is open, showing a modal window with flight details. The modal window is titled "Airfare" and contains the following information:

- Trip from Perth to Sydney**
- Trip Description:** Testing
- Trip Date:** 02/08/2024 - 02/09/2024
- Flight Information**
- Carrier Code:** QF
- Flight Number:** 0642
- Departure Date:** 02/08/2024 7:00 AM
- Departure City:** PER
- Arrival City:** SYD
- Ticket Number:** 781700R7872403

The background table shows the following data:

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
☐	Cash	Airfare Reservation	Qantas Perth, AUSTRALIA	02/07/2024	USD 301.90	€ 301.56
					€ 301.56	€ 301.56

When a travel itinerary is added for this expense, the travel allowance itinerary auto populates with the travel dates and destinations from the associated travel booking done in Concur travel.

The screenshot shows the same SAP Concur Expense report interface. The "Travel Allowance" dropdown menu is open, and the "Add Travel Allowance" button is highlighted with a red box. The background table shows the following data:

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
☐	Cash	Airfare Reservation	Qantas Perth, AUSTRALIA	02/07/2024	USD 301.90	€ 301.56
					€ 301.56	€ 301.56

Travel Allowance

Itinerary

Itinerary Name * * Required

Flight ☐ Detailed Itinerary ? ☐ Without overnight ?

Allowance Category *

Company

Start Location * ☐ Perth, AUSTRALIA

Start Date * 08/02/2024

Start Time * 7:00 AM

+ Add Destination

Arrival Location * ☐ Sydney, AUSTRALIA

+ Add Destination

End Location * ☒ Perth, AUSTRALIA

End Date * 08/07/2024

End Time * 6:00 AM

Next: Adjust your travel allowance

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Support for Collective Agreements in Metal and Car Industries in Austria

Overview

Travel Allowance support is now available for the companies participating in collective agreements in metal and car industries in Austria.

SAP Concur offers a best practice template for client rate bundles tailored to the needs of collective agreements in metal and car industry. The template is:

- SAP_CONCUR_AT_TEMPLATE_METAL_INDUSTRY

This template includes the following features:

- Reimbursement intervals of calendar days for domestic trips and 24-hour intervals for foreign trips
- Deductions
- Special rates for local trade fair and local construction site
- Calculation of domestic and foreign trip parts based on time bands

- Handling of trips longer than 28 days
- Calculate additional travel allowance for travel outside working hours in Austria
- Calculate total foreign travel time of up to 5 hours as domestic in Austria

The customers can access the templates by downloading corresponding .ZIP files which can then be uploaded on the SAP Concur solution and used to set up client rate bundles. .CSV files containing rates, deductions, and adjustments can be uploaded onto the client rate bundles to further configure them as per the industry-specific requirements. Contact your implementation team for information on the availability of template files for configuring client rate bundles.

This template for client rate bundles is provided in addition to the statutory rate bundles containing tax-free rates. The customers can use the client rate bundles derived from the templates along with the statutory rate bundles. While doing that, the client rate bundles need to contain only those settings that should supersede the settings in the statutory rate bundles.

Configuration / Feature Activation

Contact your implementation team to download the templates for client rate bundles and configure them.



For more information, refer to [Concur Expense: Travel Allowance Austria Statutory Bundles](#) setup guide.



For general information about this functionality, refer to the [Concur Expense: Travel Allowance Generic Configurable Bundle](#) setup guide.



Additional product guides for Concur Expense may be found at the [Concur Expense: Travel Allowance Country -Specific Configuration Guides](#) landing page.

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Expense

****Planned Changes** Expense Integration with Microsoft Teams**

Information First Published	Information Last Modified	Feature Target Release Date
May 10, 2024	--	Q3 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for a future release, Concur Expense will integrate with Microsoft (MS) Teams. This integration will allow users to collaborate on Concur Expense tasks without leaving MS Teams.

End-User Experience

Once MS Teams is enabled for an organization, the SAP Concur app can be added to the user's MS Teams. Once within the SAP Concur app within MS Teams, the user can type search terms such as "Expense" or "Expense Approvals" to retrieve entire reports. A list with the latest five active reports will appear.

Expense reports will be available to view in MS Teams or to be shared with an approver in a chat.

Approvers will be able to search expense reports from their approval queue. A list with the latest five active reports will appear. Approvers will be able to approve or reject reports from within MS Teams.

Configuration / Feature Activation

This feature is enabled by default. There are no configuration steps.

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

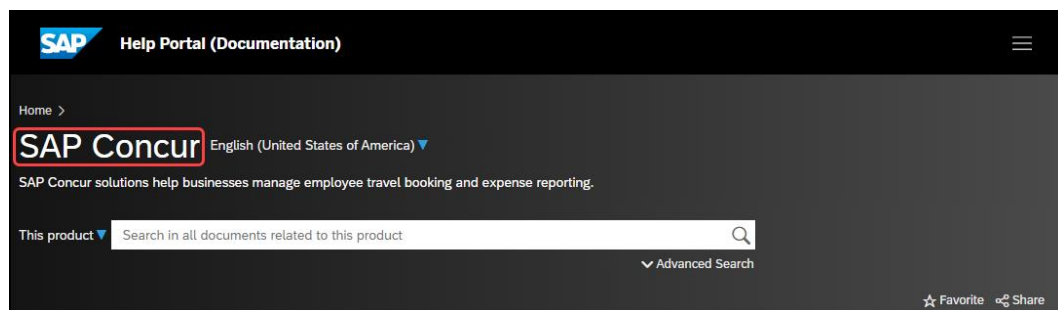
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

▶ ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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SAP Concur Release Notes Concur Expense Professional / Premium	
Month	Audience
Release Date: August 2024 Initial Post: August 16, 2024	Client FINAL

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Release Notes

This document contains the release notes for Concur Expense professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Expense

Expense Integration with Microsoft Teams

Overview

With this release, Concur Expense is integrating with Microsoft (MS) Teams. This integration allows users to collaborate on Concur Expense tasks without leaving MS Teams.

End-User Experience

Once MS Teams is enabled for an organization, the SAP Concur app can be added to the user's MS Teams. Once within the SAP Concur app within MS Teams, the user uses search terms such as "Expense" or "Expense Approvals" to retrieve entire reports. A list with the latest five active reports appears.

Expense reports can be viewed in MS Teams or to be shared with an approver in a chat.

Approvers can search expense reports from their approval queue. A list with the latest five active reports appears. Approvers can approve or reject reports from within MS Teams.

Configuration / Feature Activation

This feature is enabled by default. There are no configuration steps.

Expense Pay

Additional AMEX Corporate Card Programs Now Supported for APAC and EMEA Regions

Overview

Expense Payment Manager supports reimbursement for the following AMEX corporate credit card programs issued in Malaysia, the Philippines, South Korea, South Africa, and Taiwan in their local currencies:

- American Express – APAC – Malaysia (MYR)
- American Express – APAC – Philippines (PHP)
- American Express – APAC – South Korea (KRW)
- American Express – EMEA – South Africa (ZAR)
- American Express – APAC – Taiwan (TWD)

This update allows end users to automate the reimbursement process for corporate AMEX cards in these countries/currencies and expedites the processing of credit card expenses.

Administrator Experience

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

Add New Card Program

Program Name

Payment Type

▼

Program Type:

American Express - EMEA - South Africa

▼

[Verify IIN](#)

Currency

ZAR

Active

Yes

▼

☐ Classic

☒ Payment Provider

Corporation Number (CI

Save

Cancel

Add New Card Program ✕

Program Name

Payment Type

Program Type:
 [Verify IIN](#)

Currency

Active

☐ Classic ☒ Payment Provider

Header ID

Save **Cancel**

End-User Experience

You must setup the card program and configure a card batch in the **Configure Batches** area of Payment Manager. To complete setting up the card program, request the **Corporation Number (CID)** for EMEA card programs and **Header ID** for APA card programs from your AMEX representative, to enter in the corresponding field when setting up the card program.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Japan Public Transport (JPT)

UPDATED: Addition of New JPT Relevant Fields in Audit Rules

Overview

Three new JPT relevant fields are introduced as part of the audit rule configuration to enable auditing of selected expenses before reimbursement.

The new fields are as follows:

- Route search order type / Trip attribute (Fast / Easy / Cheap)
- Seat type (Reserved / Non-Reserved / Green (first class))
- Additional charge

The audit rule configuration based on these fields are a pre-requisite that serves towards the Public Services market.

This update is available for both the Concur Expense Professional and Standard editions. It helps customers enforce checks before an expense report is submitted for reimbursement based on company policies.

Administrator Experience

On the **Audit Rules > Custom** page, the Expense Administrator first configures the expense type as Japan Public Transport. Next, insert another condition and configure values for the JPT specific audit rules as shown in the following image:

The screenshot displays the 'Audit Rules' configuration interface. On the left, the 'Expense Admin' sidebar lists various administrative tasks. The main area is titled 'Audit Rules' and includes tabs for 'Custom' and 'Random'. Below these are steps for 'Audit Rule', 'Conditions', and 'Exception'. The 'Conditions' tab is active, showing two conditions being configured. The first condition is 'Expense Type' equal to 'Japan Public Transportation'. The second condition is 'JPT - Is Route Cheap' equal to 'Yes'. The right sidebar lists various audit rule fields, with 'JPT - Additional Charges', 'JPT - Is Route Cheap', 'JPT - Is Route Easy', 'JPT - Is Route Fast', and 'JPT - Seat Type' highlighted in a red box.

NOTE: The expense type needs to be limited as Japan Public Transportation for the JPT specific audit rules to work correctly.

End-User Experience

When these JPT specific audit rules are configured, the user is alerted to fix their entries to be able to submit their expense reports.

The screenshot shows the SAP Concur Expense interface. At the top, there's a breadcrumb trail: Home / Expense / Manage Expenses / EntrySave_AuditRule. Below this, a section titled 'Alerts: 6' is highlighted with a red box. It lists six alerts, each with a warning icon and a 'View' link:

- Entry Save : Select different seat type other than reserved. View
- Entry Save : Origintype is route search. Select different origin type. View
- Entry Save : Additional Amount is more than 500 View
- Entry Save : Route is cheap. Please select other. View
- Entry Save : JPT route is fast. Please select other. View
- Entry Save : JPT route is easy. Please select other. View

Below the alerts, the entry is titled 'EntrySave_AuditRule \$46.43'. It shows 'Not Submitted' and 'Report Number: AP134U'. There are buttons for 'Delete Report', 'Copy Report', and 'Submit Report'. Below these are tabs for 'Report Details', 'Print/Share', and 'Manage Receipts'. A 'View Available Receipts' link is also present. At the bottom, there's a table with columns: Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, Amount, Requested, and a three-dot menu. The table contains one row with a warning icon in the Alerts column, 'Cash' in Payment Type, 'Japan Public Transportation' in Expense Type, '06/13/2024' in Date, '¥7,280' in Amount, and '\$46.43' in Requested.

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.



For more information, refer to the *Concur Expense: Audit Rules Setup Guide* and *Concur Expense: JPT on NextGen UI Setup Guide*.

Receipt Handling – Digital Receipts

Receipt Digitalization - Switzerland

Overview

SAP Concur now allows the conversion of paper receipts into digital copies with probative value for Switzerland. Receipt Digitalization provides clients the ability to conform a paper receipt into a legal digital copy according to their country's regulatory or government authorities.

This feature is available to new and existing clients in Switzerland and those who have configurations in Switzerland. Additional countries will be included in future releases.

The release for Switzerland includes:

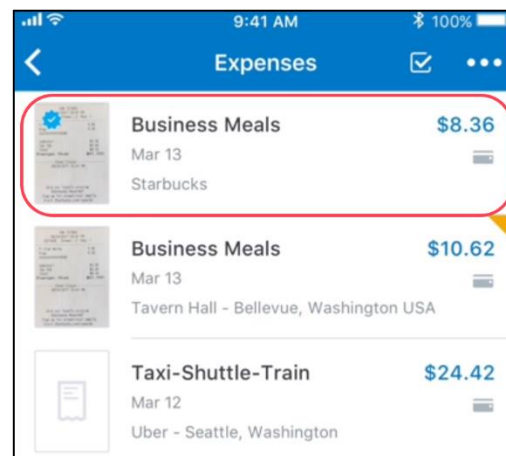
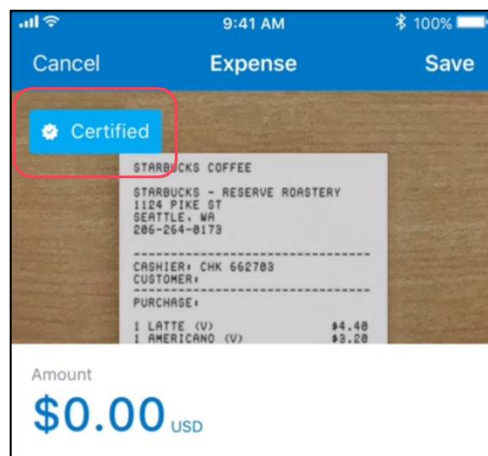
- Enabling the conversion of paper receipts into digital copies with legal value
- Viewing the "**Certified**" status of the digitized receipt in NextGen Expense
- Configuring audit rules that look for expenses with paper receipts



For information regarding legislation in Switzerland, refer to the [Fedlex](#) website.

The Receipt Digitalization feature requires that users must be using the NextGen UI for Concur Expense. It is required that clients migrate users that will use this feature to the NextGen Expense UI before activating this service.

To digitalize original paper receipts, clients must utilize the latest version of the SAP Concur mobile app. User can capture a picture of the paper receipt within the mobile app. Once the picture is taken, the digitalization process is applied to the image. After the process is complete, a stamp appears on the digitalized receipt in the mobile app, confirming whether the receipt is certified or not.



NOTE: Digitalized copies of original paper receipts can be captured with the SAP Concur mobile app using Quick Expense, creating an expense report entry, or ExpenseIt.

Digitized receipts are displayed for users in NextGen UI in **Available Expenses**, **Available Receipts**, and in the expense list, like any other receipt.

Approvers and processors will view the "**Certified**" receipt status in the expense report and expense list in the existing version of Concur Expense. Audit rules can be created that identify certified receipts on the expense line item. A certified icon will display for receipts that are digitalized.

End-User Experience

The end user can now see a compliance status mark on Mobile UI or Web UI when they upload receipts via the camera in the Concur mobile app.

Configuration / Feature Activation

On the **Group Configurations** page, in the **Digital Compliance Country Rule** list, admins can select **Switzerland** to enable this feature.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Attendee Detail View

Digital Compliance Country/Region Rule: Switzerland

Spain

France

Japan e-Bunsho

China e-Fapiao

Mexico CFDI

Portugal

Switzerland

None

Foreign Currency Exchange Rate: Transaction Date

Cancel Save

For general information regarding Group Configuration settings, refer to the *Expense: Group Configurations for Expense Setup Guide*.

For more information, refer to the *Expense: Receipt Handling – Digital Receipts Setup Guide*.

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.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the [Shared Changes Release Notes](#).

Expense Report

****Planned Changes** Adding New Expenses to Addendum Reports**

Information First Published	Information Last Modified	Feature Target Release Date
Aug 9, 2024	--	August 22, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Concur Expense allows users to add new expenses to an addendum report. In an upcoming release, Concur Expense will provide administrators with the ability to prevent new expenses from being added to an addendum report. Addition of new expenses can be disabled using the settings in the **Site Settings** screen.

For example, the user submits a report, and an approver rejects an expense on that report, the expense will move to an addendum report and is returned to the user. With this feature disabled, the user will not be able to create new expenses in this addendum report and thus the cycle of submission, rejection, and creation of new addendum reports will be prevented.

This feature will ensure shorter reimbursement timelines and increased end-user satisfaction, while providing greater control to administrators.

End-User Experience

With this update, users will not be able to view an enabled **Add Expense** button inside the addendum report in the **Manage Expenses** screen if their administrator has disabled this feature. This button will allow them to add new expenses to the addendum report.

Administrator Experience

To disable this functionality, the expense administrator will navigate to the **Administration > Expense > Site Settings** screen and uncheck the **Allow users to add new expenses to addendum reports** setting.

The screenshot shows the 'Site Settings' configuration page for Expense Administration. At the top are 'Save' and 'Cancel' buttons. Below are various settings, many of which are checked. The setting 'Allow users to add new expenses to addendum reports' at the bottom is highlighted with a red rectangle. Below the settings is a section for 'Select additional employee fields to display in user search results' with two lists and 'Add'/'Remove' buttons. The first list contains: Division, Department, Team, Org Unit 4, Org Unit 5, Org Unit 6, and Custom 01. The second list contains: Employee ID and Logon ID.

Site Settings Configuration:

- ☐ Allow users to email reports and print reports in PDF
- ☐ Enable personal card charge import
- ☐ Allow users to opt into Expense Assistant
- ☐ If set to true, allow more than one Authorization Request to be assigned to a single report.
- ☒ Allow traveler to remove an E-Receipt without creating an expense
- ☒ Allow traveler to remove a trip segment without creating an expense
- ☒ Allow users to combine expenses into a single merged expense
- ☒ Use Request allocation data (first) and Expense data (second) to pre-populate allocation fields ?
- ☒ Use Named Groups for Car Configuration
- ☐ Non Domestic Tax Enabled
- Non Domestic Tax Field:
- ☐ Enable Report Number for Expense Accounting Extracts ?
- ☒ Use reclaim extraction factors at tax rate level (Canada tax only)
- ☐ Enable Taxability and Deductibility Calculation Service
- ☒ Allow users to copy expense reports
- ☒ Allow users to add expenses via Quick Expenses grid
- ☒ Allow users to add mileage expenses via Mileage grid
- ☐ Allow approvers to view reports approved as a delegate
- ☒ Allow users to manage favorite allocations
- ☒ Allow Cash Advance Administrator to Create & Issue cash advances.
- ☒ Allow Cash Advance Administrator to Record Return Amount.
- ☐ Allow amounts to appear in limit-based exception messages (enable only if used) ?
- ☐ Provide default exchange rate for cash advance issuance

Select additional employee fields to display in user search results

Available Fields	Action	Selected Fields
Division	Add / Remove	Employee ID
Department		Logon ID
Team		
Org Unit 4		
Org Unit 5		
Org Unit 6		
Custom 01		

- ☒ Allow users to search by Employee ID
- ☐ Enable Validation Rules
- ☐ Allow a multiple use of the same receipt for multiple expense entries within an expense report
- ☐ Allow users to add new expenses to addendum reports

Configuration / Feature Activation

This feature is enabled by default and accessible by Concur Expense Administrators.

Expense Types****Planned Changes** Customizing Expense Types Descriptions and Quick Tips**

Information First Published	Information Last Modified	Feature Target Release Date
August 9, 2024	August 16, 2024	September 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

SAP Concur will enhance the **Expense Configuration Administrator (Restricted)** role with the ability to customize descriptions for an expense type. The Concur Expense admins will also be able to correctly define the quick tips, providing a company-level guidance on the usage of an expense type.

This feature will also help provide the customers with the information they need to select the correct expense types when submitting an expense report. This will, thereby reduce the rate of returned expense reports and will help the customers correctly classify their expenses and will aid in timely reimbursements.

Administrator Experience

Navigate to the **Expense > Administration > Expense Types > Expense Types Descriptions and Quick Tips** screen to customize the expense types descriptions and quick tips.

EXPENSE TYPE DESCRIPTION

To modify an expense type, select a language from the drop-down list and a policy from the policy drop-down list. You can also search for the expense type by name

using the search text box or scroll down the list of expense types available to select one. Click **Modify**.

The first screenshot shows the 'Expense Types' interface. It has tabs for 'Expense Types', 'Expense Type Limits', 'Itemization Wizard', and 'Description and Quick Tips'. Under 'Expense Types', there's a 'Select a language' dropdown with 'English' selected, a 'Select a policy' dropdown, and an 'Enter expense type name' text box with a 'Search' button. A red box labeled '1' highlights the 'Select a language' dropdown. Below this is a list of expense types: 01. Travel, 02. Transportation, 03. Meals and Entertainment, 04. Office Expenses, 05. Communications, 06. Fees, 07. Other, and 08. Relocation/Ex-Pat. A 'Modify' button is also visible.

The second screenshot shows the same interface but with the 'Select a policy' dropdown open, showing a list of policies: CA Expense Policy, GB Expense Policy, Purchase Card Expense Policy, Standard Central Reconciliation Policy, Test Global, Test Global-Sales, Test Inception Policy, Test Wizards Policy, US Expense Policy, and US Expense Policy. A red box labeled '2' highlights this dropdown.

The expense type modification dialog displays. Enter an appropriate description for the expense type in the **Default Description** text box. Click **Save and Next** to move to another expense type or to go back to the previous screen.

The screenshot shows the 'Modify Expense Type: Breakfast' dialog. It has tabs for 'Expense Types', 'Expense Type Limits', 'Itemization Wizard', and 'Description and Quick Tips'. The 'Description' tab is active, showing a 'Description:' section with instructions: 'Add intended use, a definition, or examples to guide employees. Descriptions will be visible when employees select an expense type.' There's a 'View Example' link and a 'Modifying Language:' dropdown with 'English' selected. Below this is a 'Default Description' text box with the text 'default description for breakfast expense type'. A red box highlights this text box. Below the text box is a note: 'Leave this field blank to exclude description for this expense type.' and a link 'Add policy specific description.' At the bottom right, there are 'Cancel' and 'Save and Next>>' buttons, with the latter highlighted by a red box.

Expense type descriptions will be limited to 270 characters and only text is allowed. **Hyperlinks will not be supported in descriptions.** An example for a business meal

type description is: "This expense type is to be used when a business meeting is conducted over the course of a meal."

NOTE: Ensure you add descriptions to only expense types that require a brief explanation to avoid overcrowding the user interface.

You can also add policy specific descriptions to one or more policies simultaneously. Click **Add policy specific description** and select the policies from the drop-down list. Add a description on the text box and click **Save**.

Expense Types

Expense Types | Expense Type Limits | Itemization Wizard | Description and Quick Tips

Modify Expense Type: Breakfast

Description | Quick Tips

Description:
Add intended use, a definition, or examples to guide employees

View Example
Modifying Language: English

Default Description ⓘ
default description for breakfast expense type

Leave this field blank to exclude description for this expense type

Add policy specific description.

Add Policy Specific Description

Add intended use, a definition, or examples to guide employees. Description

Policies:

- ☒ CA Expense Policy, GB Expense Policy
- ☒ CA Expense Policy
- ☒ GB Expense Policy
- ☐ Purchase Card Expense Policy
- ☐ Standard Central Reconciliation Policy
- ☐ Test Global
- ☐ Test Global-Sales
- ☐ Test Inception Policy
- ☐ Test Wizards Policy
- ☐ US Expense Policy
- ☐ US Expense Policy

CA Expense Policy, GB Expense Policy

CA and GB policy description for Breakfast expense type

Leave this field blank to exclude description for this expense type

Save Cancel

These descriptions can be modified or deleted later if required. Click **Save and Next** to move on to the next section for this expense type.

Expense Types

Expense Types
Expense Type Limits
Itemization Wizard
Description and Quick Tips

Modify Expense Type: Breakfast

1 Description
2 Quick Tips

English

Default Description ⓘ:

default description for breakfast expense type

Leave this field blank to exclude description for this expense type.

[Add policy specific description.](#)

Policy Specific Description:

Customise description for specific policies, the policy specific description will override the default description.

CA Expense Policy:
CA and GB policy description for Breakfast expense type

Modify
Remove

GB Expense Policy:
CA and GB policy description for Breakfast expense type

Modify
Remove

Cancel
Save and Next>>

QUICK TIPS

To modify the quick tips for an expense type, navigate to the **Quick Tips** tab after you complete filling in the description for the expense type. Enter the description in

the text box and click **Save and Done**. The text in the **Quick Tips** field will be limited to 530 characters only. Hyperlinks will be supported.

Expense Types

Expense Types | Expense Type Limits | Itemization Wizard | Description and Quick Tips

Modify Expense Type: Breakfast

1 Description 2 **Quick Tips**

Quick Tips:
Add guidance for the form fields in expense details. Quick tips will be visible on the expense form.

[View Example](#)

Modifying Language:
English

Default Quick Tips ?

B I U | | | |

Default quick tips for **Breakfast** Expense Type

1. Please attach receipt
2. The amount the cannot exceed \$500

Leave this field blank to exclude quick tips for this expense type.

[Add policy specific quick tips.](#)

Cancel <<Previous **Save and Done**

For example, the administrator will update the quick tips for a business meal as follows: "Ensure that all attendees are listed for the expense. Alcohol is not permitted to be expensed. Ensure tips for the meal are 20% or less. A receipt is required for this expense."

You can also add policy specific quick tips to one or more policies simultaneously. Click **Add policy specific quick tips** and select the policies from the drop-down list. Add a description on the text box and click **Save**.

Expense Types

Expense Types | Expense Type Limits | Itemization Wizard | Description and Quick Tips

Modify Expense Type: Breakfast

1 Description 2 Quick Tips

Quick Tips:
Add guidance for the form fields in expense details. Quick tips will be visible on the expense form.

[View Example](#)
Modifying Language:
English

Default Quick Tips ⓘ
Default quick tips for **Breakfast** Expense Type

1. Please attach receipt
2. The amount cannot exceed \$500

Leave this field blank to exclude quick tips for this expense type.

[Add policy specific quick tips.](#)

Add Policy Specific Quick Tips

Add guidance for the form fields in expense details. Quick tips will be visible on the expense form.

Policies:
CA Expense Policy, GB Expense Policy

Quick tips for Breakfast expense type for the following policies

- CA Expense Policy
- GB Expense Policy

Leave this field blank to exclude quick tips for this expense type.

Save Cancel

These quick tips can be modified or deleted later if required. Click **Save and Done** to complete the modification for this expense type.

Expense Types

Expense Type Limits

Itemization Wizard

Description and Quick Tips

Modify Expense Type: Breakfast

1 Description

2 Quick Tips

Leave this field blank to exclude quick tips for this expense type.

Add policy specific quick tips.

Policy Specific Quick Tips:

Customise quick tips for specific policies, the policy specific quick tips will override the default quick tips.

CA Expense Policy:

Quick tips for Breakfast expense type for the following

- CA Expense Policy

ModifyRemove

GB Expense Policy:

Quick tips for Breakfast expense type for the following

- CA Expense Policy
- GB Expense Policy

ModifyRemove

Cancel<<PreviousSave and Done

The view from **Available Expense > Expense Types** will reflect this newly added expense types descriptions when the admin modifies the expense types descriptions and quick tips.

End-User Experience

Users will be able to view the descriptions when selecting an expense type for an expense report. Using the search box, you will be able to search for an expense type using the expense categories and expense type descriptions too.

Add Expense to Report

Available Expenses

New Expense

Select an Expense Type for the new expense

Search by Expense Type, Category, Description

Q

Collapse All Sections

=

☰

▼

Recently Used

Airfare

Checked baggage, flight change/cancellation, seat selection and carry-on luggage

Parking

Parking for commuting to the office or client facing meetings

Business Meal (with Attendees)

Meals incurred for business purposes, including client meetings, conference, and networking events.

Per-Diem Daily Meal (Employee Only)

▼

1. Travel

Airfare

Checked baggage, flight change/cancellation, seat selection and carry-on luggage

Airfare Over Limit

Cancel

Concur

Expense

Manage Expenses

Card Transactions

Home / Expense / Manage Expenses / For Approval - Edit / Breakfast

← →

Breakfast USD 7.99

19/12/2023 Safeway

Cancel

Delete Expense

Save Expense

Hide Receipt

Details

Itemizations

Attendees (1)

Allocate

Expense Types *

Search for an expense type

Tolls Allowance

This expense type covers allowances for toll fees incurred during business travel, ensuring smooth passage on toll roads, similar to how superheroes navigate obstacles effortlessly.

Tolls/Road Charges

Use this expense type to record toll fees and road charges incurred during business travel, ensuring compliance with transportation regulations, similar to how superheroes abide by traffic rules.

Train

Select this expense type for train fare expenses incurred during business travel, providing a convenient and efficient mode of transportation, similar to how superheroes utilize trains for their missions.

03. Meals and Entertainment

Breakfast

The most important meal, ensuring you start your day as energized as Captain America.

Payment type

Cash

Amount *

7.99

Currency *

US, Dollar (USD)

Receipt

CFDI

Receipt

1585B10A30C84BB694BD68AD3145E9
21.jpg

The expense types descriptions will also display on the **Expense Source** screen.

Expense Source

Safeway 12/15/2023 USD 7.99

Expense Source	Vendor	Date	Amount
Expenseit	Safeway Prenov, Czech Republic	13/01/2024	USD 7.99

Expense Type *

Search by Expense Type, Category, Description

Recently Used

Airfare

Any flight fees, whether it is the original airfare purchase or the cost difference to change a flight.

Business Meal (with Attendees)

Meals incurred for business purposes, including client meetings, conference, and networking events.

Per-Diem Daily Meal (Employee Only)

Airfare

Airfare

Any flight fees, whether it is the original airfare purchase or the cost difference to change a flight.

Airfare Over Limit

🔍

🔍

🔄

📄



Save

Close

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Initial Post: August 16, 2024

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Concur Expense Professional / Premium
Client FINAL

The quick tips will also display on the screen when adding an expense to a report.

Home / Expense / Manage Expenses / For Approval - Edit / Breakfast

19/12/2023 | Safeway

Breakfast USD 7.99

Cancel Delete Expense Save Expense

Hide Receipt

Details Itemizations

Attendees (1) | Allocate

Expense Types * * Required field

Breakfast

Quick Tips Show Less

- Choose healthy options for breakfast.
- Keep all breakfast receipts for expense reports.
- Watch this helpful video for more tips.

Net Tax Amount 10.58 Transaction Date 19/12/2023

Business Purpose * For Approval - Edit Vendor Description * Safeway

City State/Province

Payment Type * Cash

Amount * 7.99 Currency * US, Dollar (USD)

Receipt

CFDI

1585810A30C84B86948D68AD3145E9 21.jpg

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Verify

Planned Changes Incorrect Date Check

Information First Published	Information Last Modified	Feature Target Release Date
August 9, 2024	--	August 19 - 20, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Targeted for release August 19 – August 20, Concur Verify plans to release an enhancement to the existing **Incorrect Date** check. This change aims to reduce the number of false positives for the **Incorrect Date** check for credit card transactions and to minimize additional work for customer auditors.

Administrator Experience

Concur Verify plan to add a new feature to the **Incorrect Date** check by payment type. Administrators will be able to set different allowable days for each payment type. In the **Date Threshold Setting** box, in **Allowable difference in days**, administrators can set the days in the **Cash** and **Card** fields.

Additionally, the date check for card transactions can be turned off if needed. In the **Date Threshold Setting** box, toggle the **Status** switch **On** or **Off** as required.

New Check

Check Name * * Required
Incorrect Date

Description
We review the receipt and attempt to determine the receipt date. If discrepancies are found between the receipt date and the line item date, we'll raise an exception. The allowable difference between these two dates is configurable for each payment type. You can disable the date check for card payments if it is not required.

Conditions

Amount Trigger ⓘ
0.00

Expense Type Trigger ⓘ
All
[Select Expense Types](#)

Date Threshold Setting

Status	Payment Type	Allowable difference in days ⓘ
☐	Cash	0
☒	Card	30

Auditor Responses
Auditors will be able to select any of the responses below to pass or fail exceptions raised by this check. You can add custom responses to fit your needs.

[Add Auditor Response](#)

Status Type	Auditor Response	Comment to Employee	Actions
☒ Pass	Incorrect Exception		
☐ Fail	Out of policy	The date of the receipt is missing, incomplete (Month, Day and Year required) or does not match the date of the expense claim. Please correct the date discrepancy.	Edit
☐ Pass	Approve with Exception	Approved with exception: Incorrect date identified	Edit

[Save](#) [Save and Add Another](#) [Cancel](#)

Configuration / Feature Activation

The change occurs automatically; there are no additional configuration steps.

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the [Accessibility Updates](#) page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect [SAP's commitment to supporting gender diversity](#) and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the [SAP Concur release notes](#).

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all of your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the *SAP Sub-processors / Data Transfer Factsheets* page.

► **To access the SAP Concur Sub-processors List:**

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
[SAP Sub-processors / Data Transfer Factsheets](#)
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to [Your New Support User ID \(S-user\)](#) and to the [Learn All About S-User IDs](#) blog post.

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the [Concur Travel & Expense Supported Configurations](#) guide.

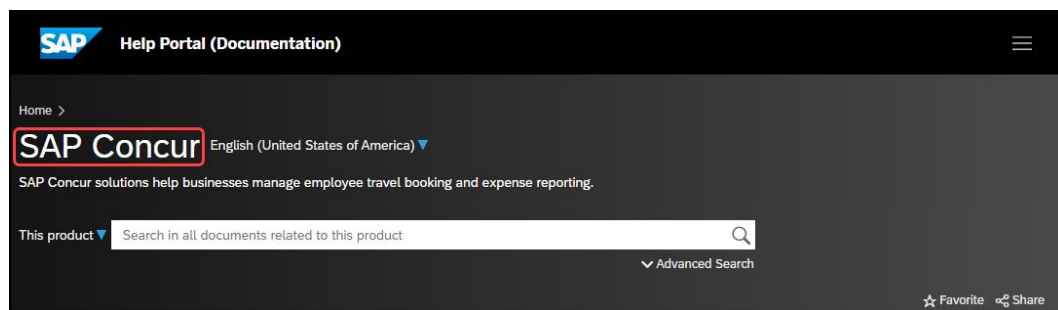
When changes to browser support are planned, information about those changes will also appear in the [Shared Changes Release Notes](#).

Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or directly on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the [SAP Concur solutions page](#).



SAP Concur Support Portal – Selected Users

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

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu, and in the SAP Concur page footer.



Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

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

Cases

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

▶ ***To check the status of a submitted case***

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

NOTE: If you do not have the option to contact SAP Concur 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. Click **Support** > **View Cases**.
4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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