Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: January 13 2018 Update #1: Tuesday, January 16, 11:00 AM PT	Client – FINAL

Contents

Release Notes

This section contains the release notes for the Expense functionality of Concur Standard Edition. Clients with other products should review those release notes, located on the Concur Support portal.

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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

What the User Sees

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

Configuration/Feature Activation

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

New Concur Logo

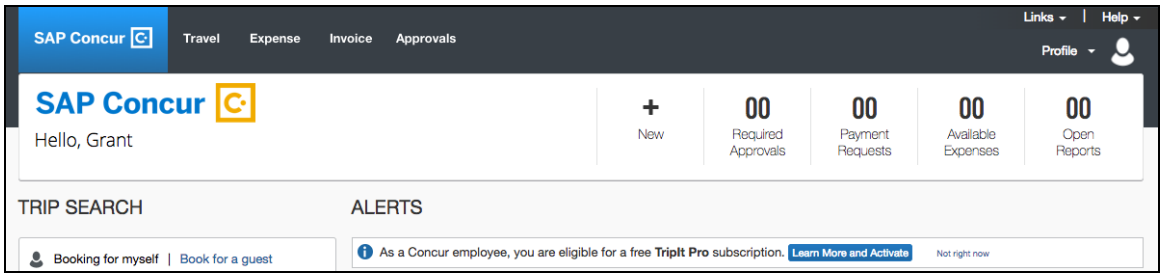
New SAP Concur Logo

Overview

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

What the User Sees

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



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

Both the SAP and Concur logos appear in the footer.

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

Configuration/Feature Activation

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

USB IC Card Readers – Japan

No Longer Supported

Overview

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

Important dates:

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

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

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

This retirement keeps Concur users aligned with current technology.

Configuration/Feature Activation

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

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

Product Settings

Option to Hide Self-Education ? Icon

Overview

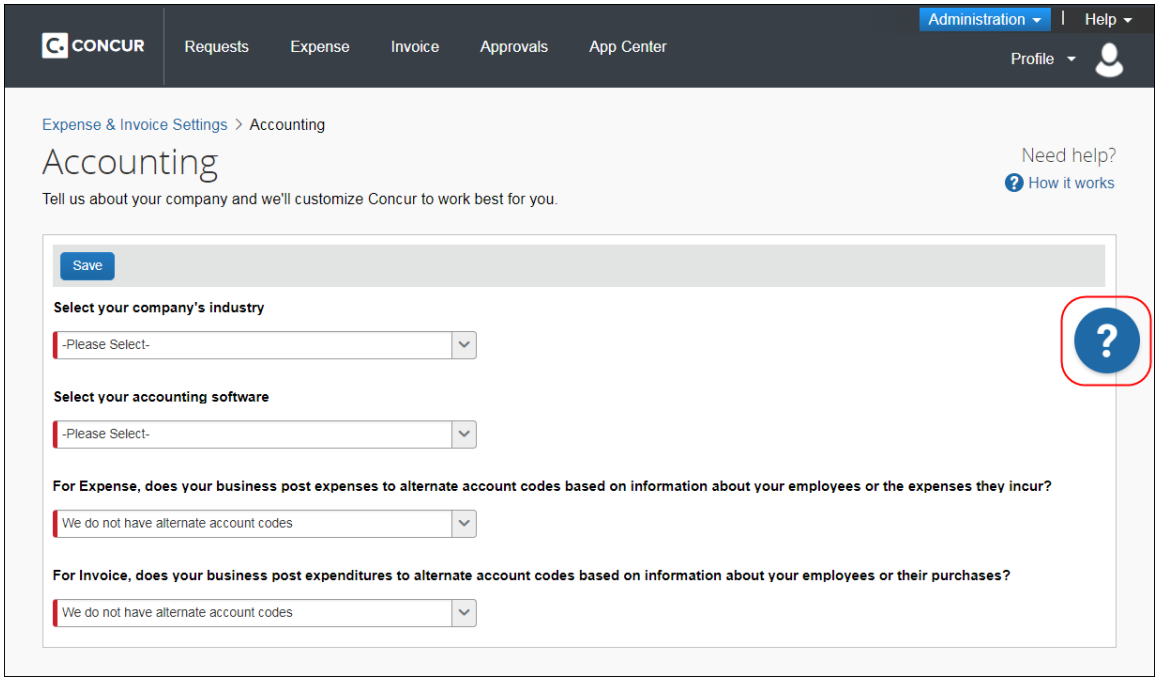
Administrators can now temporarily hide the question mark (?) icon used to access the self-education pane on the Product Settings pages and other pages where the self-education pane is available.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement provides additional flexibility for managing the visibility of the self-education pane.

What the Admin Sees

If the self-education pane is available on a page, a question mark (?) icon is displayed on the right side of the page.



If you place your pointer over the question mark (?) icon, an X is now displayed next to it.

If you want to hide the question mark (?) icon while you are on the page, click the X.

The next time you access the page, the question mark (?) icon will appear again on the page.

Configuration/Feature Activation

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

Value Added Tax (VAT)

(Norway) Updated Reduced Rate

Overview

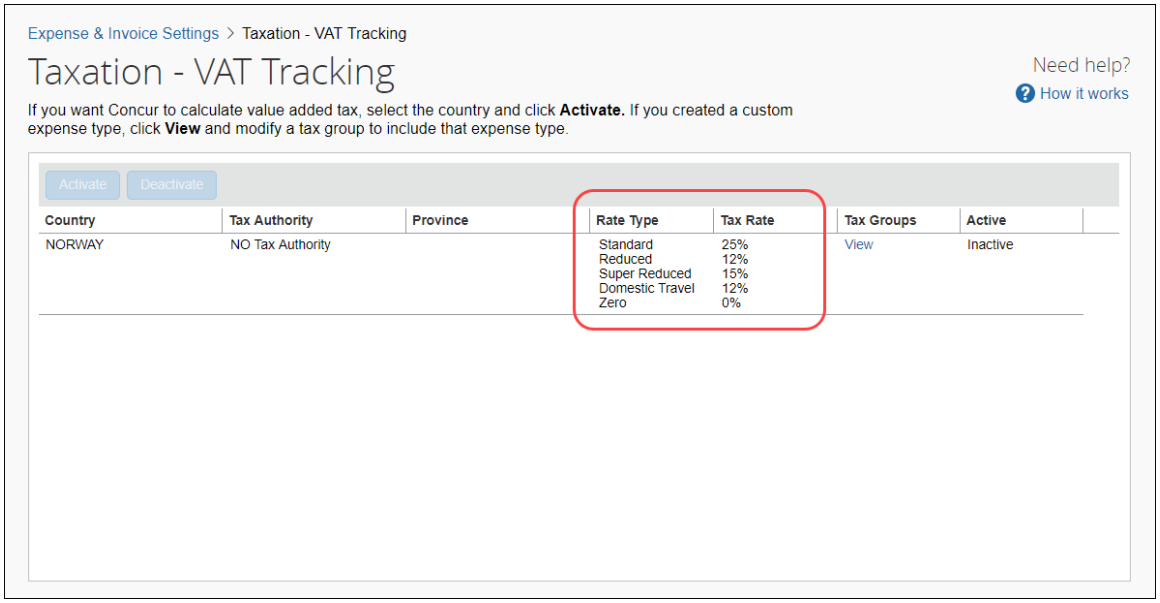
Concur has updated the Reduced and Domestic Travel VAT rates from 10% to 12% effective January 1, 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

The new rates display on the **Taxation – VAT Tracking** page of Product Settings.



Configuration/Feature Activation

The **Taxation – VAT Tracking** page automatically displays the new rates; there are no additional configuration or activation steps.

(Switzerland) Updated Rates

Overview

Concur has updated VAT rates for Switzerland effective January 1, 2018.

The following table displays the updated rates:

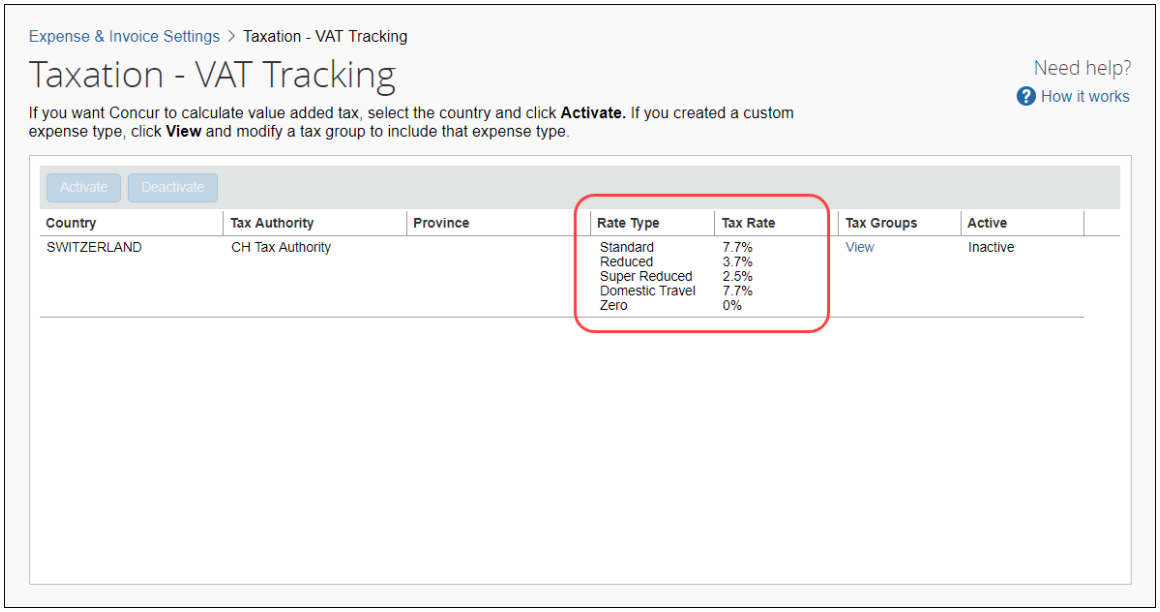
Rate Type	Current Rate	New Rate
Standard	8.0	7.7
Reduced	3.8	3.7
Domestic Travel	8	7.7

BUSINESS PURPOSE/CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

The new rates display on the **Taxation – VAT Tracking** page of Product Settings.



Configuration/Feature Activation

The **Taxation – VAT Tracking** page automatically displays the new rates; there are no additional configuration or activation steps.

Planned Changes

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

Admin

Planned Changes Removing the "Privacy Agreement" Page

Overview

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

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

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

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

FAQs

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

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

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

> **A.** On April 14, 2018, the page will be removed; users will no longer see the privacy agreement – whether customized or generic.
>
> Between now and April 14, if you want to remove your customized privacy agreement from the **Privacy Agreement** page, you can. For clients who have access to the custom text option or the privacy agreement settings, you can make those changes yourself. For clients who do not have access to the custom text option or the privacy agreement settings, you can contact Concur Client Support for assistance.
>
> No action is necessary. You do not have to make changes now unless you want to.

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

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

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

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

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

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

Q. Who can I contact for more information?

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

Configuration / Feature Activation

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

Available Expenses

Planned Changes New One-Year Filter

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

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

Budget

Planned Changes New Budget Feature in Early Adopter Program

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

Overview

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

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

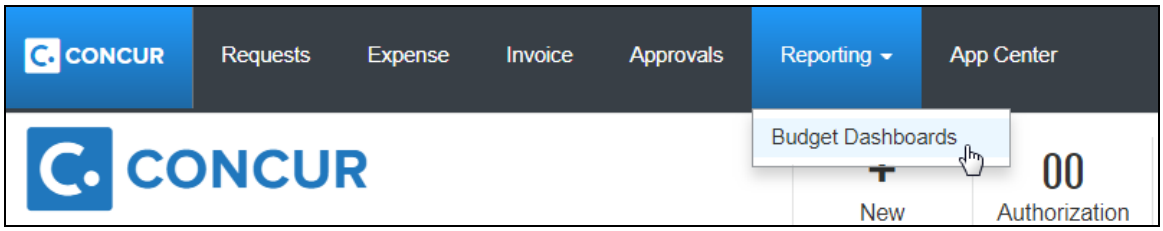
NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget Insight feature share data between both calendars.

BUSINESS PURPOSE/CLIENT BENEFIT

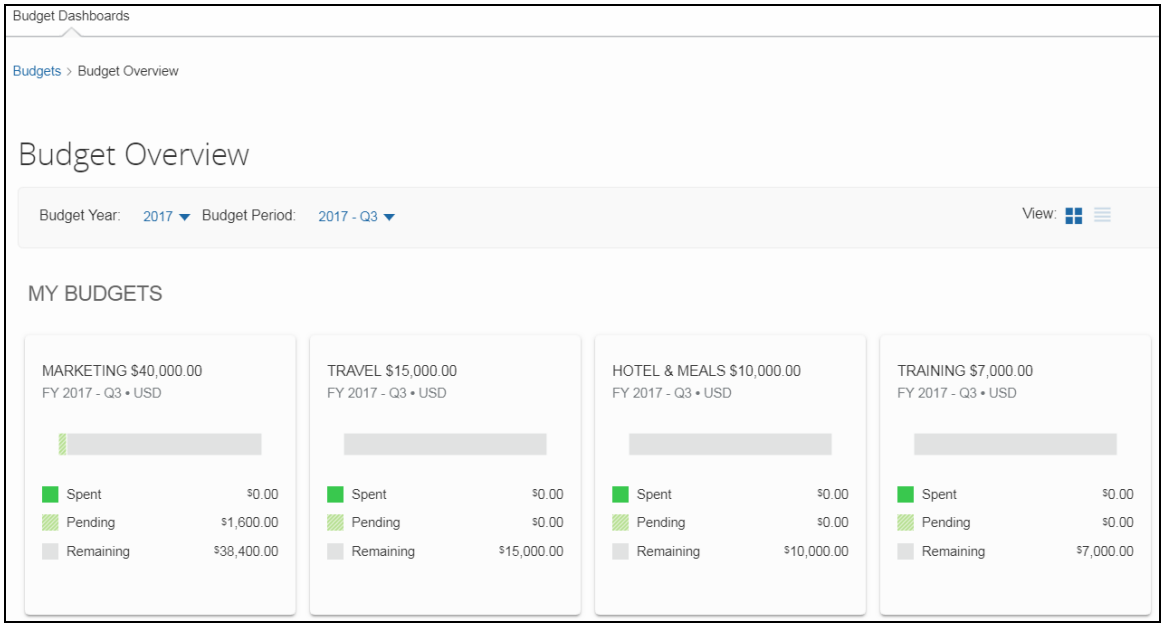
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense.

What the User Sees

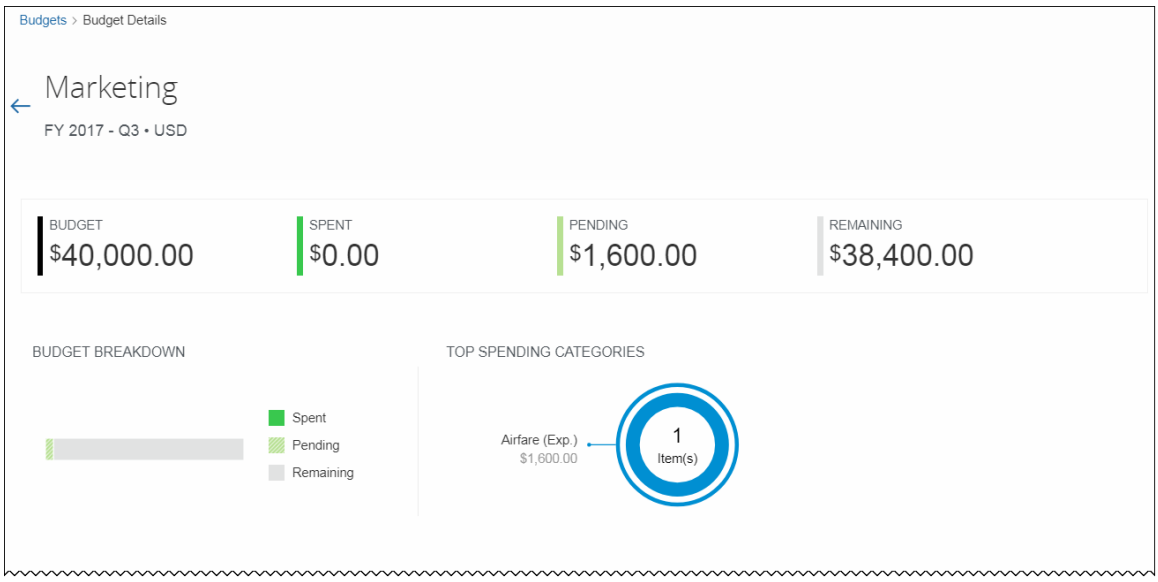
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.

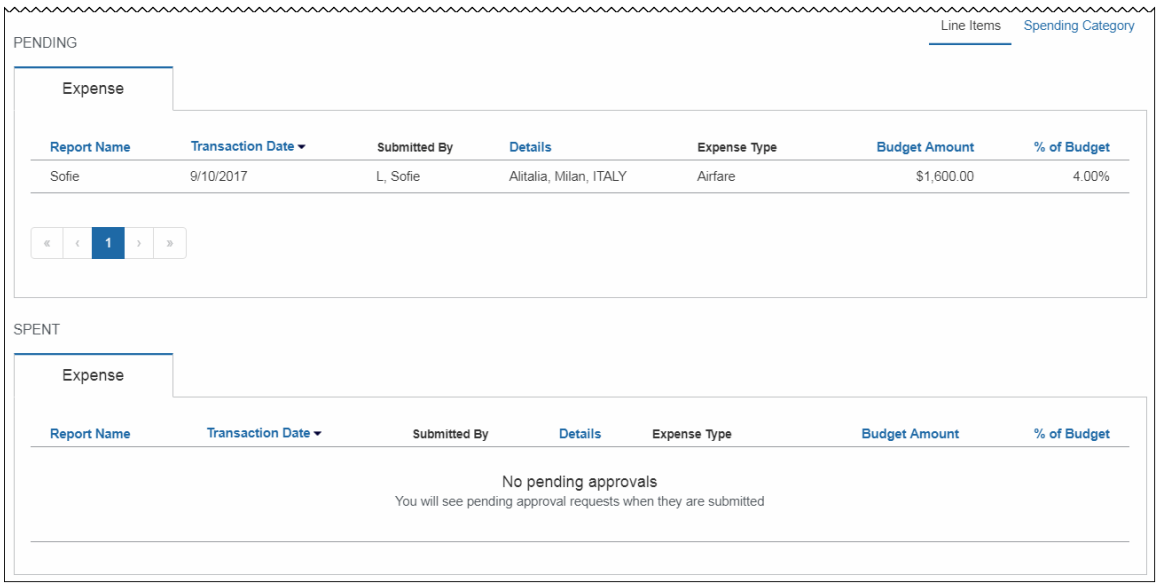


Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



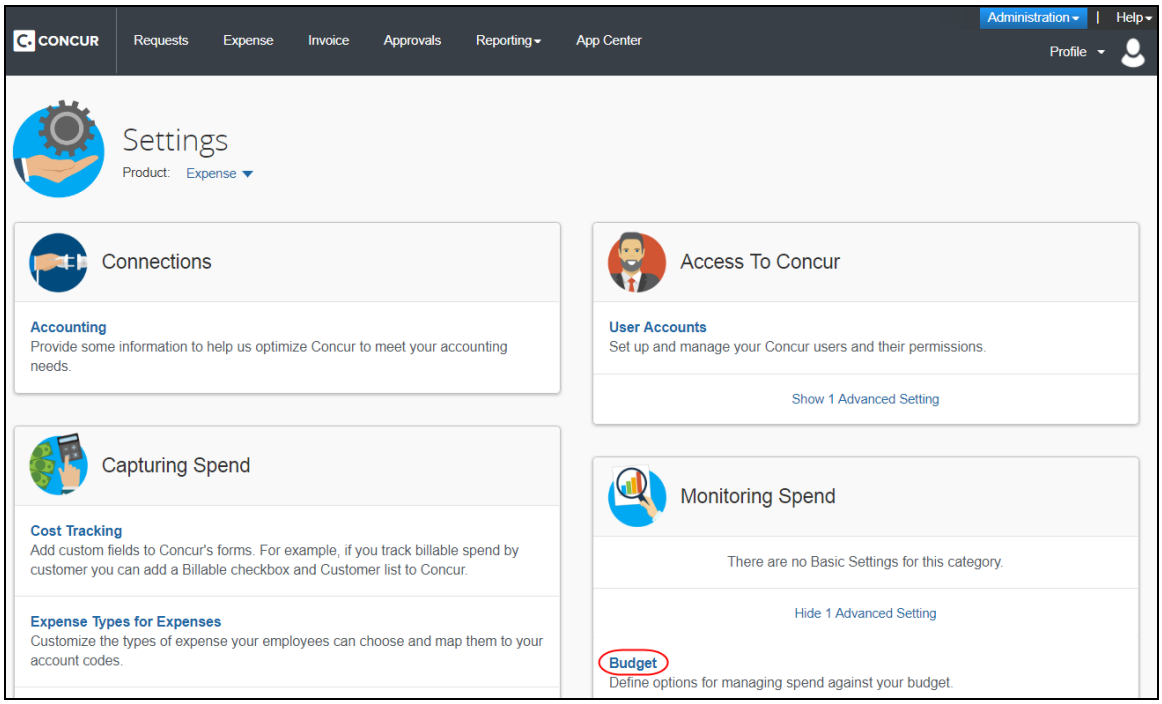
Clicking on one of the budget will show details about that budget.





What the Admin Sees

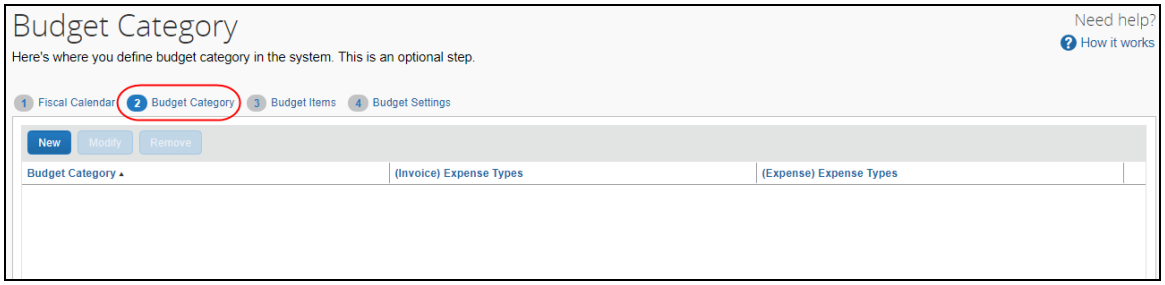
The admin will see a new setting, **Budget**, in the **Monitoring Spend** section in Product Settings.



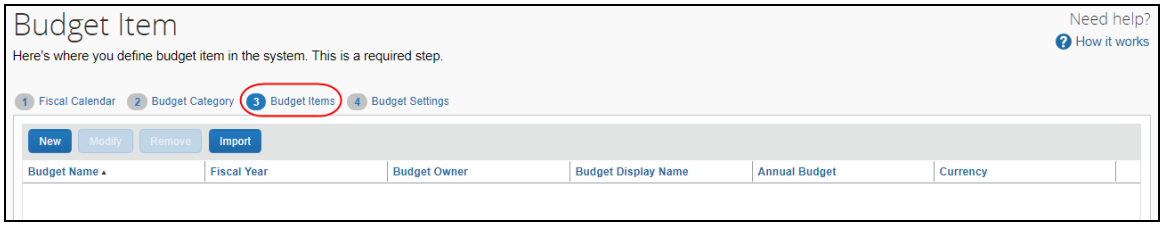
By clicking the **Budget** link, admins will be taken to the configuration pages of Budget.

Fiscal Calendar tab:

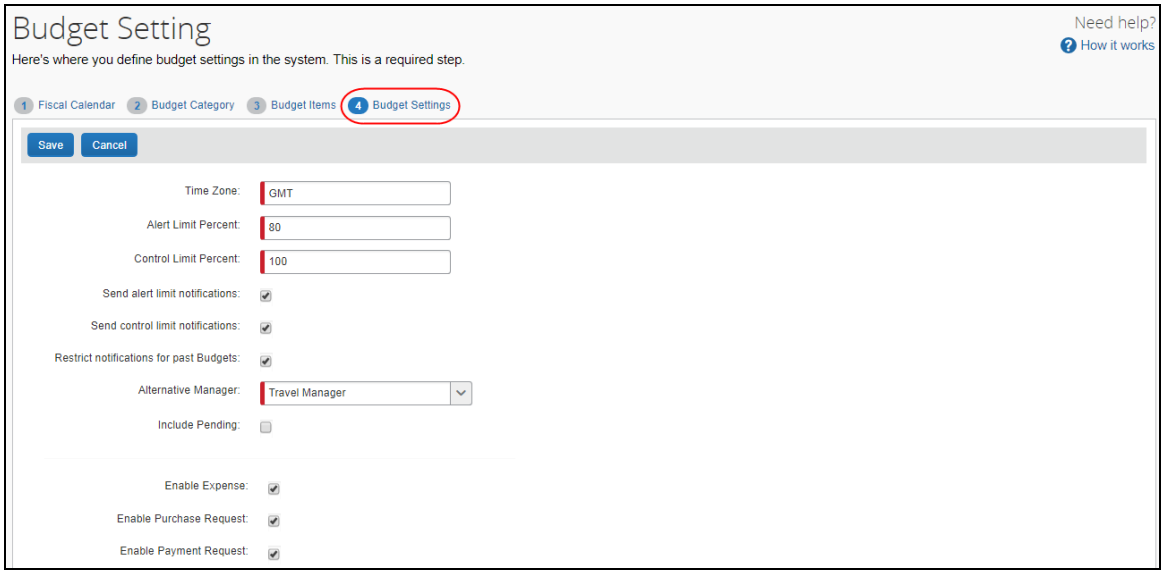
Budget Category tab:



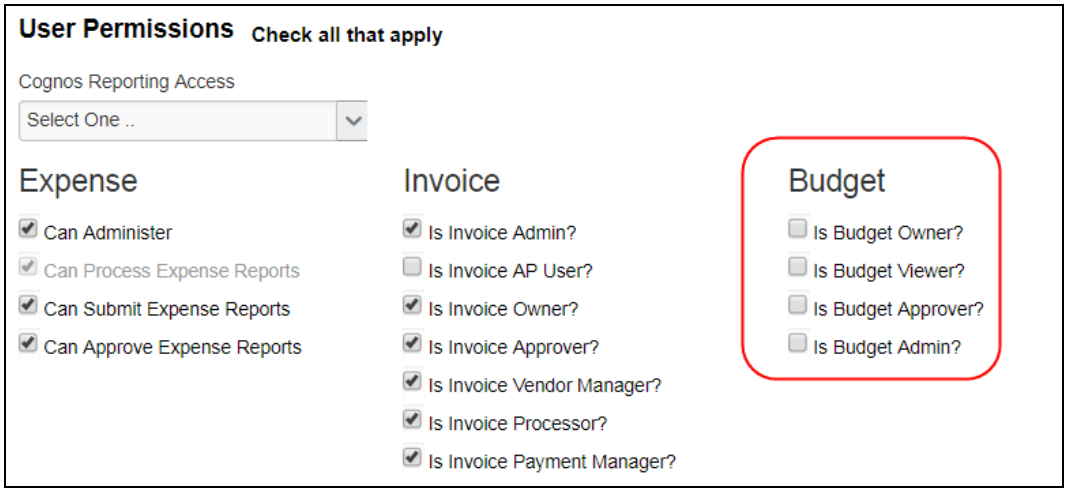
Budget Items tab:



Budget Settings tab:



In addition, by clicking the **User Accounts** link in the **Access To Concur** section of Product Settings, the admin will see the available Budget roles on the **Users** page.



Configuration/Feature Activation

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

Once Concur has activated Budget, the Budget Administrator needs to configure the feature by clicking **Administration** > **Expense Settings** or **Expense & Invoice Settings**, and then in the **Monitoring Spend** section, clicking **Budget**.

Expense Reports

Planned Changes Check for Missing Account Code Later in Workflow

Overview

Employees will be able to save, submit, and approve an expense report even if one or more account codes are missing for expenses in the report.

Currently, whenever an expense is saved, the system validates that an account code has been provided for the related expense type and adds that account code to the expense (a process not visible through the UI). If there is no account code associated with the expense, the expense cannot be saved.

With this update, the report can be submitted and approved. However, the system will block the expense data from being extracted or posted to your financial system until your Concur company administrator provides an account code mapping for the expense type in Product Settings.

BUSINESS PURPOSE/CLIENT BENEFIT

Employees are no longer prevented from completing their expense reports when an account code is missing in the expense type configuration. Account codes are now populated at a single, consistent point in the workflow.

Configuration/Feature Activation

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

Plain Text File Transfer Protocol (FTP)

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

Overview

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

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

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

What This Means – The Client Experience

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

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

📖 For more information, please refer to the *File Transfer User Guide*.

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

Product Settings

Planned Changes Category List Will Display Spend Category Suggestions

Overview

The **Category** list on the **Expense Types** page (**Expense > Expense Types**) in Product Settings will show spend category suggestions at the top of the list.

BUSINESS PURPOSE/CLIENT BENEFIT

This update simplifies the spend category selection process for expense types.

What the Admin Sees

When an administrator is assigning spend categories to expense types and opens the **Category** list for an expense type, the most commonly selected spend categories will be displayed at the top of the list.

Additional information will be available in future release notes.

Configuration/Feature Activation

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

Client Notifications

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: Concur Non-Affiliated Subprocessors

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

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

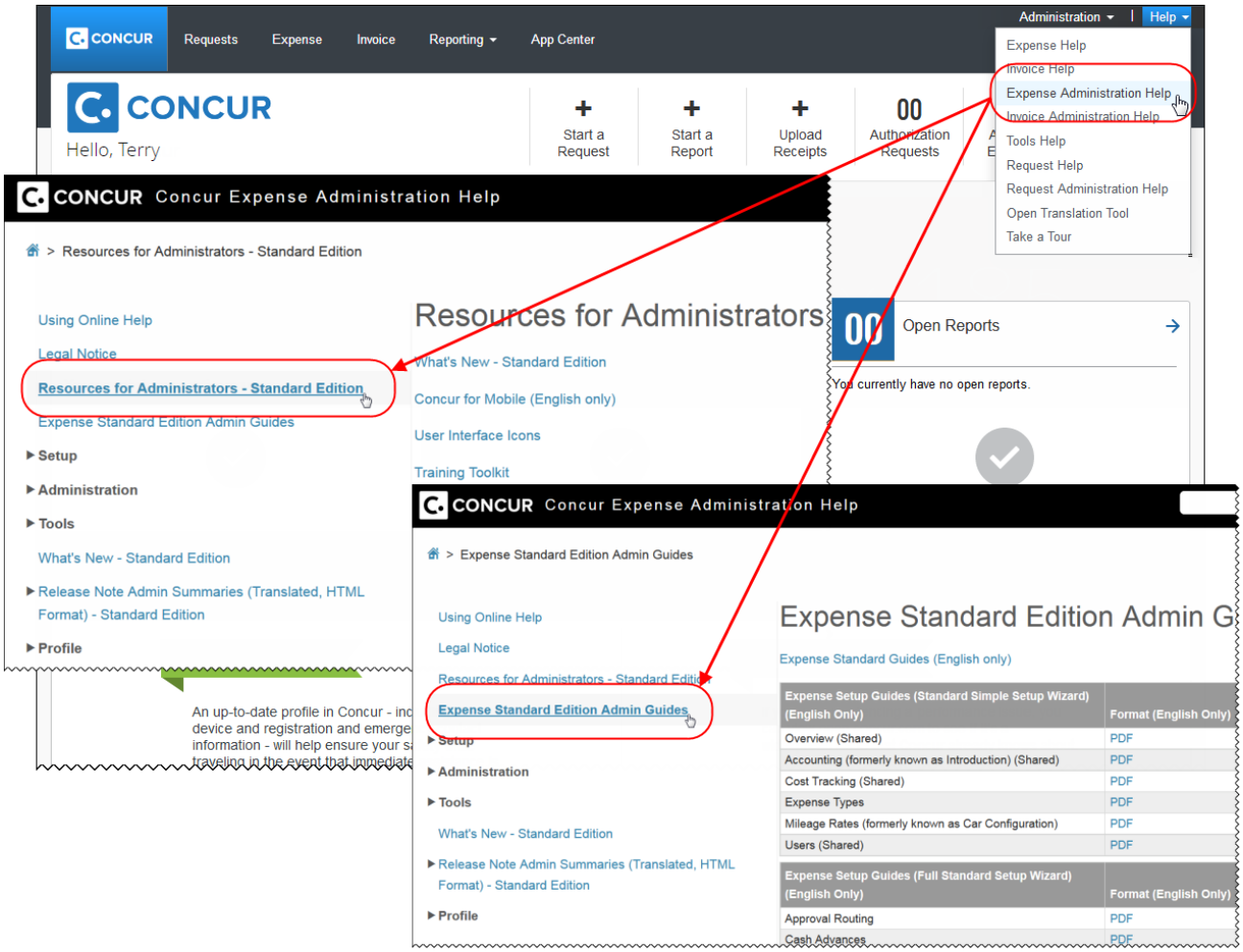
The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

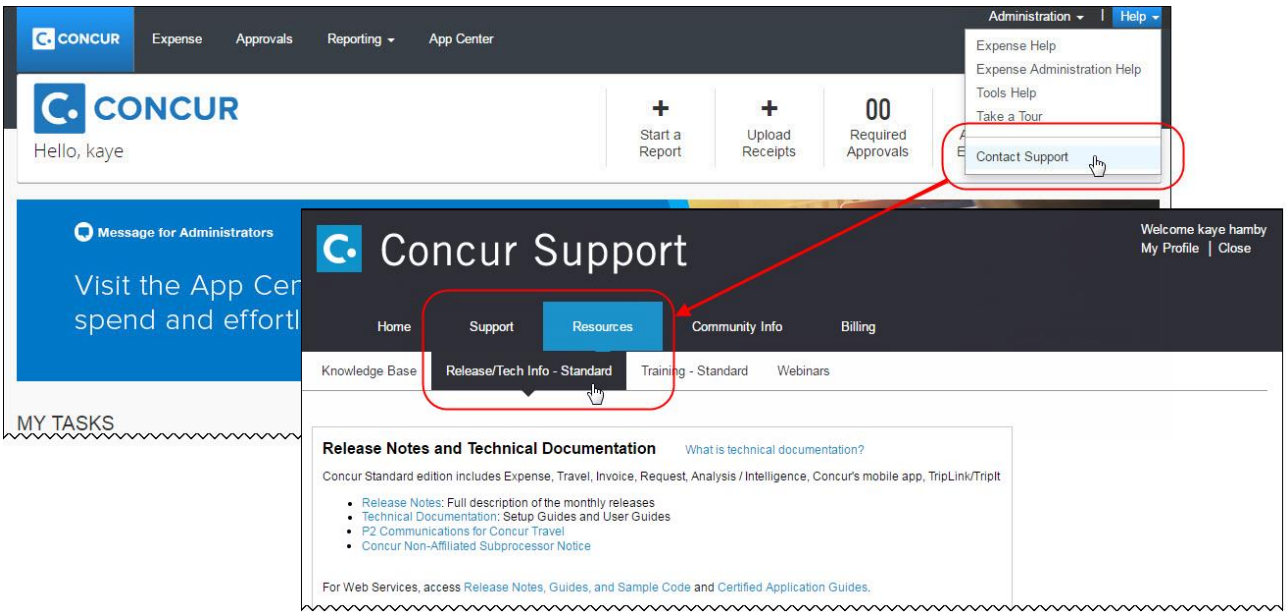
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: February 10 2018 Update #1: Friday, February 9, 2:00 PM PT	Client – FINAL

Contents

Release Notes

This section contains the release notes for the Expense functionality of Concur Standard Edition. Clients with other products should review those release notes, located on the Concur Support portal.

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

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

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

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

Next Steps

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

Budget

New Budget Feature in Early Adopter Program

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

Overview

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

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

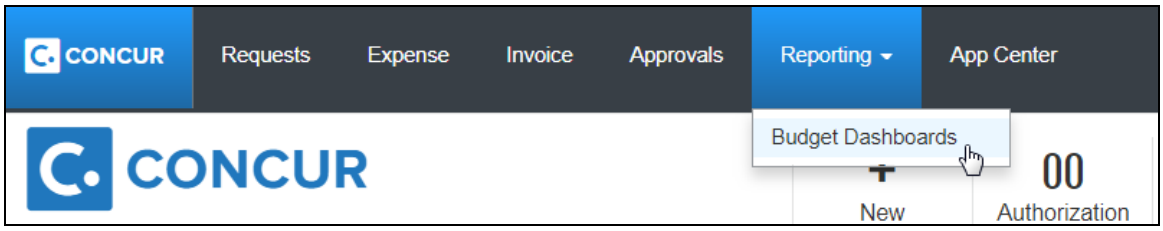
NOTE: The enhanced Fiscal Calendar for Reporting and the Fiscal Calendar in the new Budget Insight feature share data between both calendars.

BUSINESS PURPOSE/CLIENT BENEFIT

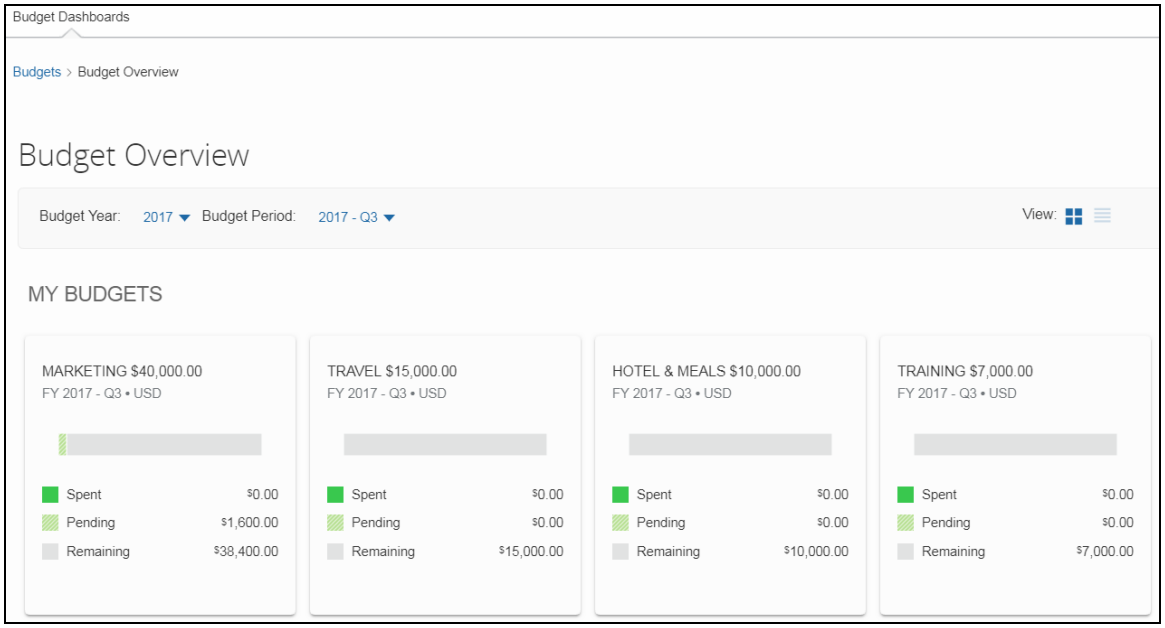
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

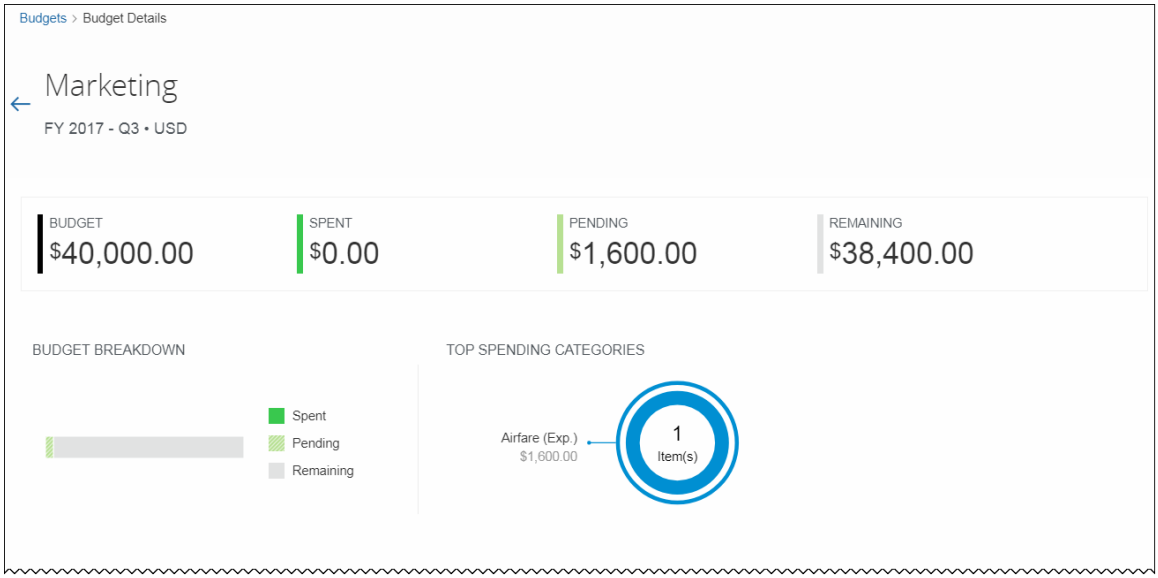
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.

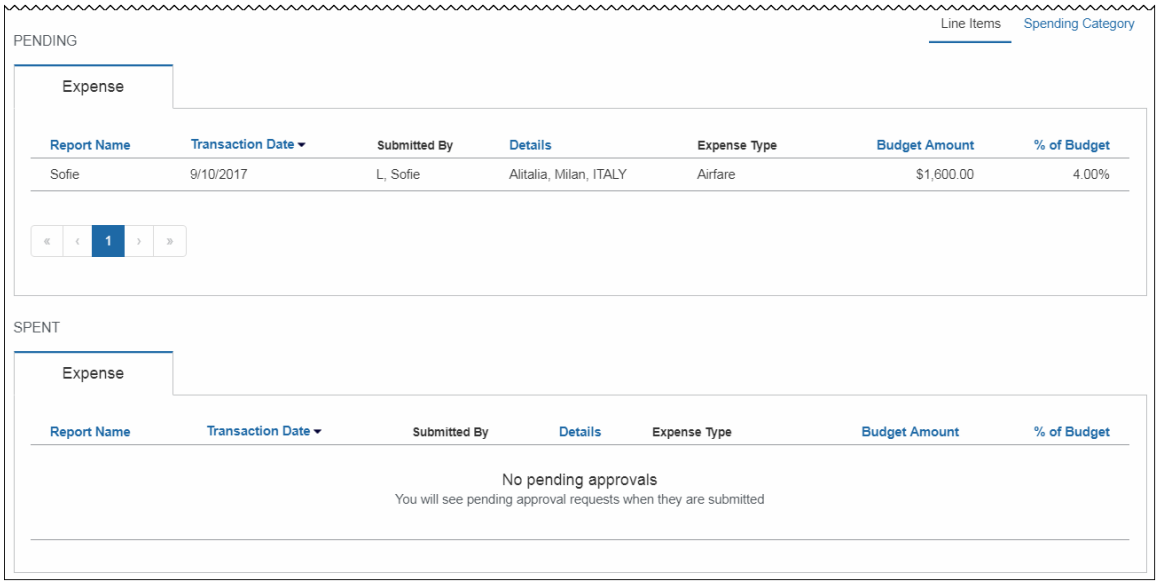


Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



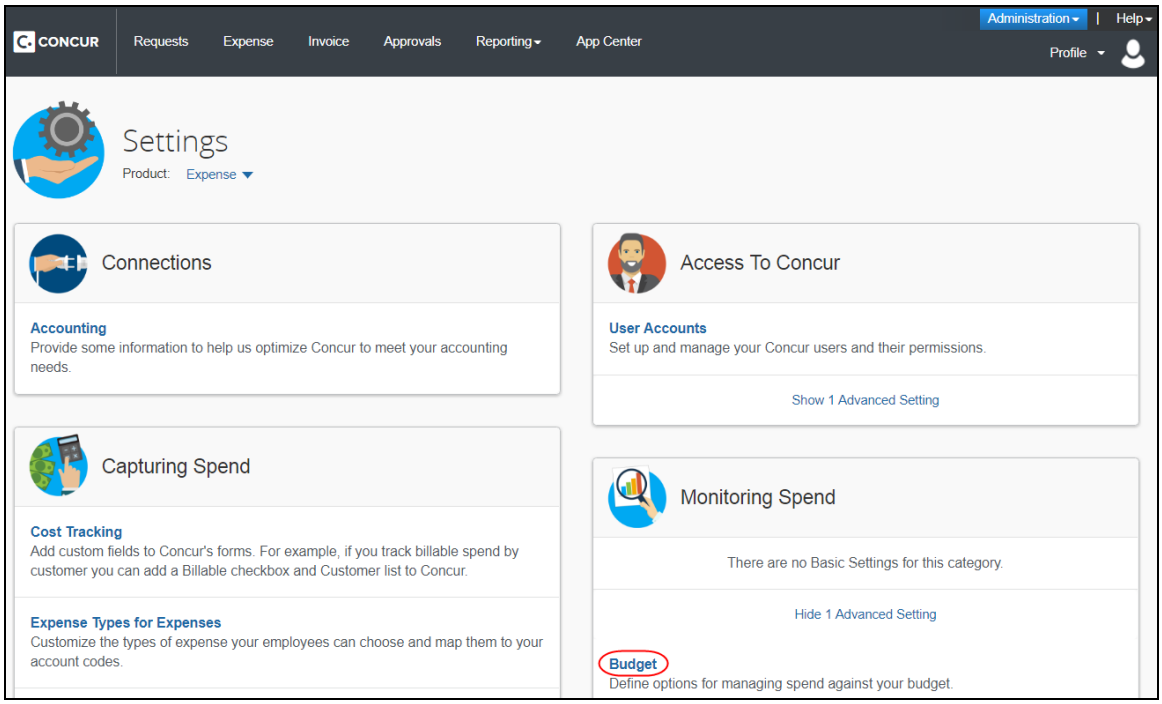
Clicking on one of the budget will show details about that budget.





What the Admin Sees

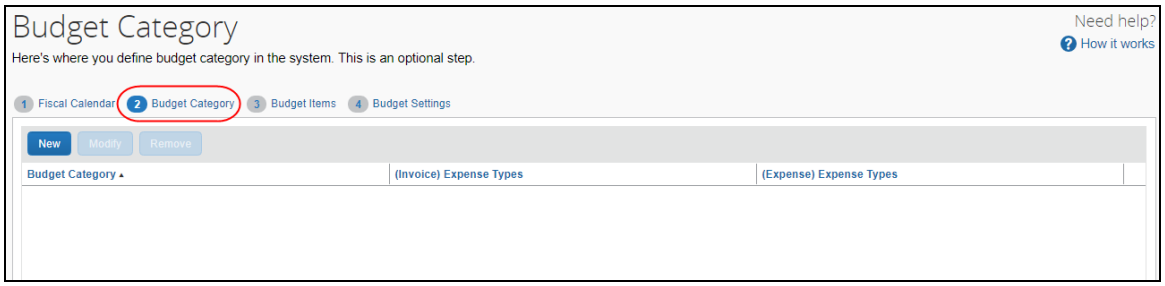
The admin will see a new setting, **Budget**, in the **Monitoring Spend** section of Product Settings.



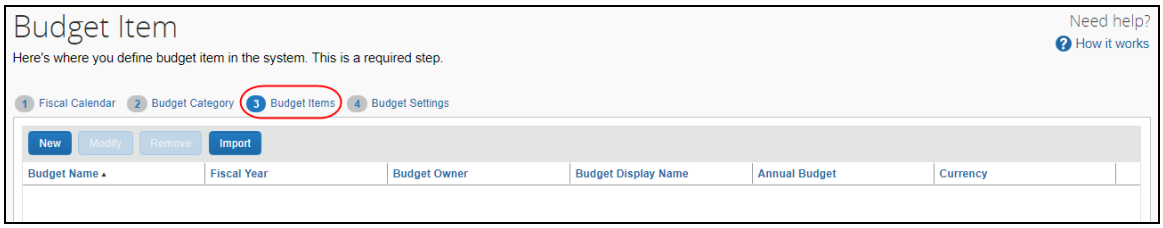
By clicking the **Budget** link, admins will be taken to the configuration pages of Budget.

Fiscal Calendar tab:

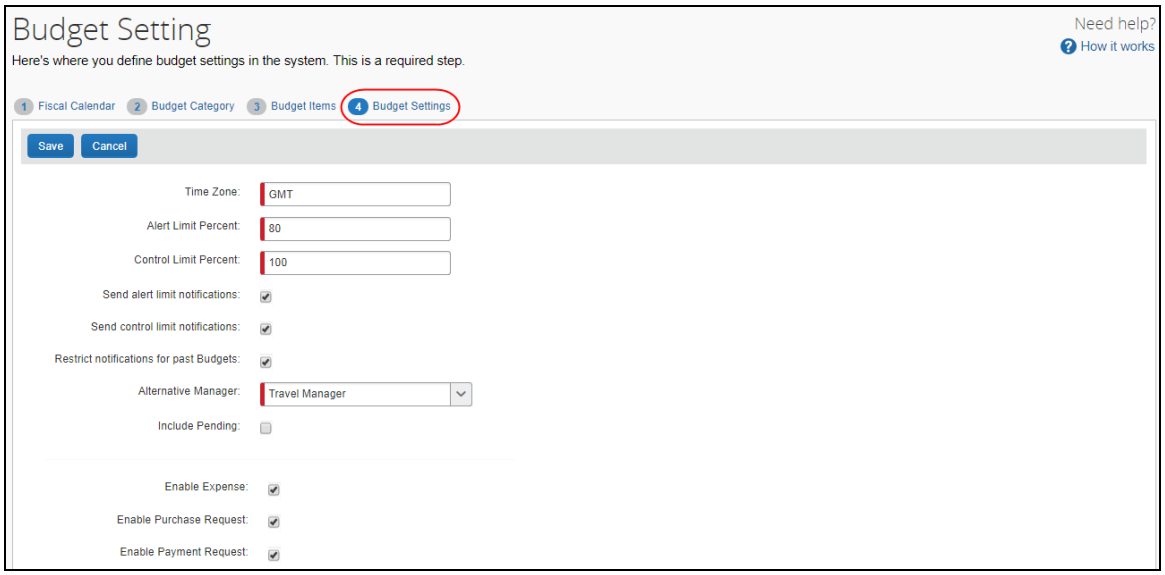
Budget Category tab:



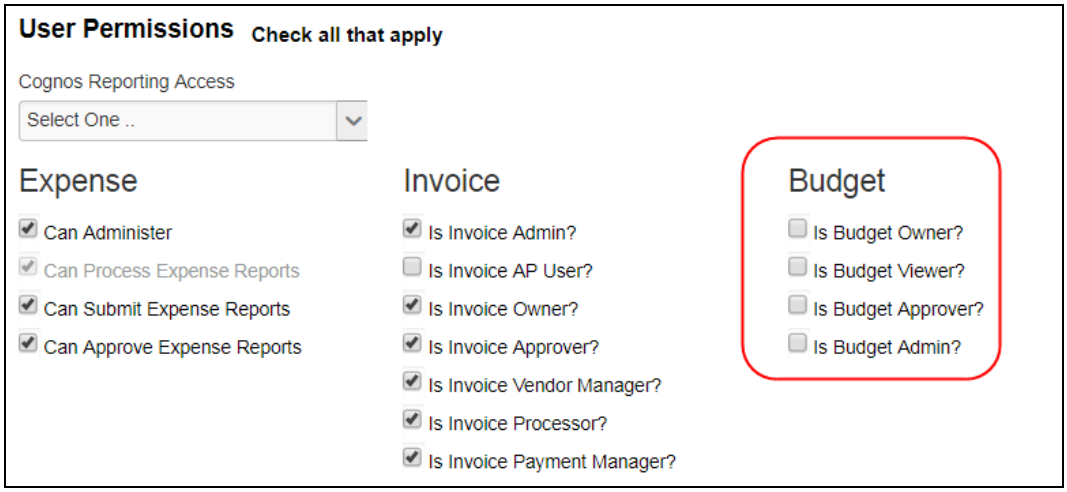
Budget Items tab:



Budget Settings tab:



In addition, by clicking the **User Accounts** link in the **Access To Concur** section of Product Settings, the admin will see the available Budget roles on the **Users** page.



Configuration/Feature Activation

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

Once Concur has activated Budget, the Budget Administrator needs to configure the feature by clicking **Administration** > **Expense Settings** or **Expense & Invoice Settings**, and then in the **Monitoring Spend** section, clicking **Budget**.

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

Concur Salesforce Connector

Version 1.113 Supports Lightning

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

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

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

Expense Pay – Global

New Message for Incomplete Banking Profiles (USD)

Overview

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

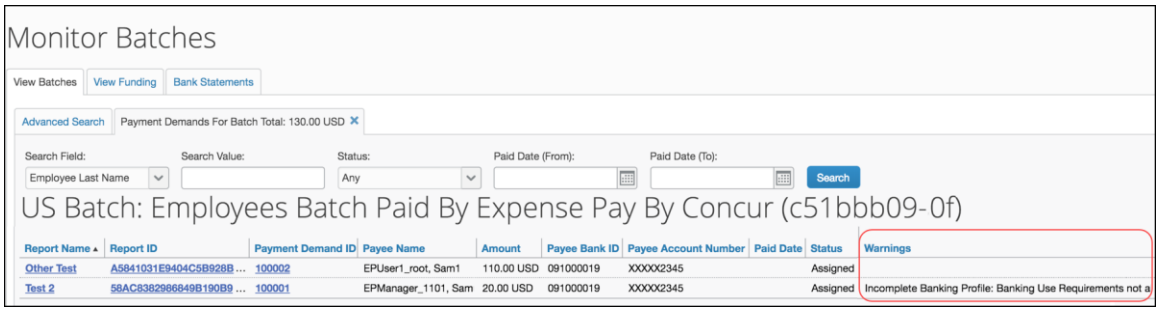
BUSINESS PURPOSE/CLIENT BENEFIT

This message helps prevent delays in successful processing of payments.

What the Admin (or User or Implementation) Sees

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

Example



Configuration/Feature Activation

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

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

Product Settings

Airline Fees and Goodwill Spend Categories Removed

Overview

With this release, Concur has removed the *Airline Fees* and *Goodwill* spend categories from the **Category** list on the **Expense** - **Expense Types** page in Product Settings. These two spend categories are no longer available for selection. Instead, clients should use the *Donations* and *Booking Fee* spend categories.

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

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement cleans up the list of spend categories.

Configuration/Feature Activation

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

Value Added Tax (VAT)

ITR Changes for Quebec Large Business (Canada)

Overview

From January 1, 2018, the Input Tax Refund (ITR) tax reclaim rate percentages for the Canadian province of Quebec will change in accordance with the planned phase out of IRT for restricted expenses.

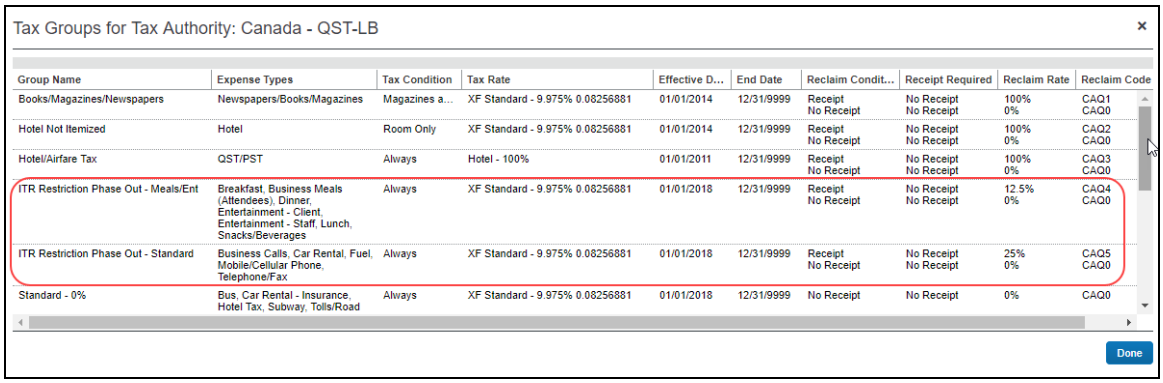
BUSINESS PURPOSE/CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

THIS RELEASE

On the **Expense Settings > Taxation - VAT Tracking > Tax Groups for Tax Authority: Canada – QST-LB** page, admins will see two new groups: **ITR Restriction Phase Out – Meals/Ent** and **ITR Restriction Phase Out – Standard**.


Tax Groups for Tax Authority: Canada - QST-LB

Group Name	Expense Types	Tax Condition	Tax Rate	Effective D...	End Date	Reclaim Condit...	Receipt Required	Reclaim Rate	Reclaim Code
Books/Magazines/Newspapers	Newspapers/Books/Magazines	Magazines a...	XF Standard - 9.975% 0.08256881	01/01/2014	12/31/9999	Receipt No Receipt	No Receipt No Receipt	100% 0%	CAQ1 CAQ0
Hotel Not Itemized	Hotel	Room Only	XF Standard - 9.975% 0.08256881	01/01/2014	12/31/9999	Receipt No Receipt	No Receipt No Receipt	100% 0%	CAQ2 CAQ0
Hotel/Airfare Tax	QST/PST	Always	Hotel - 100%	01/01/2011	12/31/9999	Receipt No Receipt	No Receipt No Receipt	100% 0%	CAQ3 CAQ0
ITR Restriction Phase Out - Meals/Ent	Breakfast, Business Meals (Attendees), Dinner, Entertainment - Client, Entertainment - Staff, Lunch, Snacks/Beverages	Always	XF Standard - 9.975% 0.08256881	01/01/2018	12/31/9999	Receipt No Receipt	No Receipt No Receipt	12.5% 0%	CAQ4 CAQ0
ITR Restriction Phase Out - Standard	Business Calls, Car Rental, Fuel, Mobile/Cellular Phone, Telephone/Fax	Always	XF Standard - 9.975% 0.08256881	01/01/2018	12/31/9999	Receipt No Receipt	No Receipt No Receipt	25% 0%	CAQ5 CAQ0
Standard - 0%	Bus, Car Rental - Insurance, Hotel Tax, Subway, Tolls/Road	Always	XF Standard - 9.975% 0.08256881	01/01/2018	12/31/9999	No Receipt	No Receipt	0%	CAQ0

Done

CURRENT AND PLANNED CHANGES

Tax Authority	Tax Group Name	Expense Types	Start Date	Reclaim Rate
Canada – QST-LB	ITR Restriction Phase Out – Meals/Ent	Breakfast Business Meals (Attendees) Lunch Dinner Snacks/Beverages Entertainment – Client Entertainment - Staff	01 January 2018	12.50%
			01 January 2019	25%
			01 January 2020	37.50%
			01 January 2021	50%
Canada – QST-LB	ITR Restriction Phase Out - Standard	Mobile Phone Telephone/Fax Business Calls Fuel Car Rental	01 January 2018	25%
			01 January 2019	50%
			01 January 2020	75%
			01 January 2021	100%

Configuration/Feature Activation

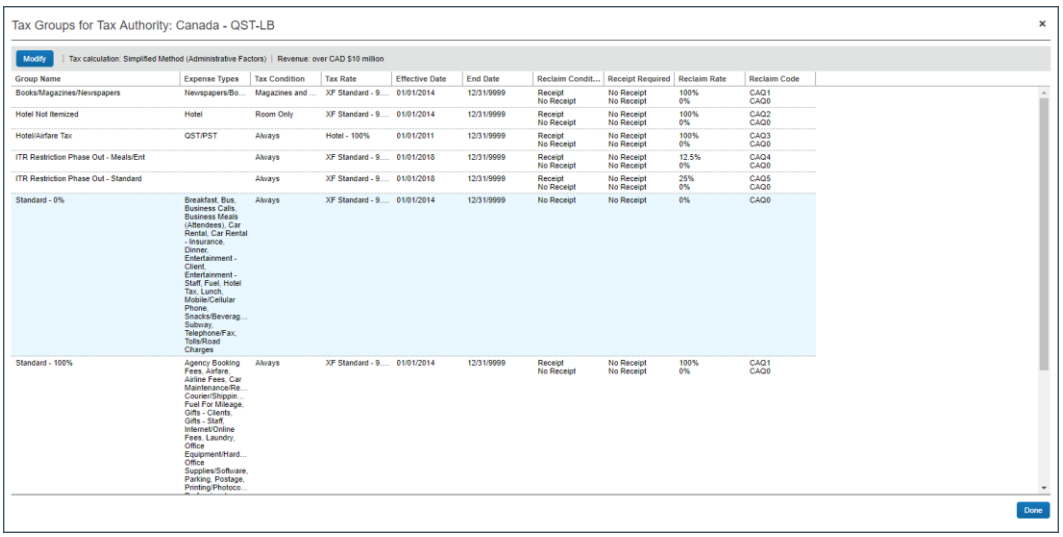
The **Taxation** page automatically displays the new rates; however, already configured clients, who want to use these new tax groups, must manually edit their expense types to use these new tax groups.

EDIT EXPENSE TYPES FOR NEW TAX GROUPS

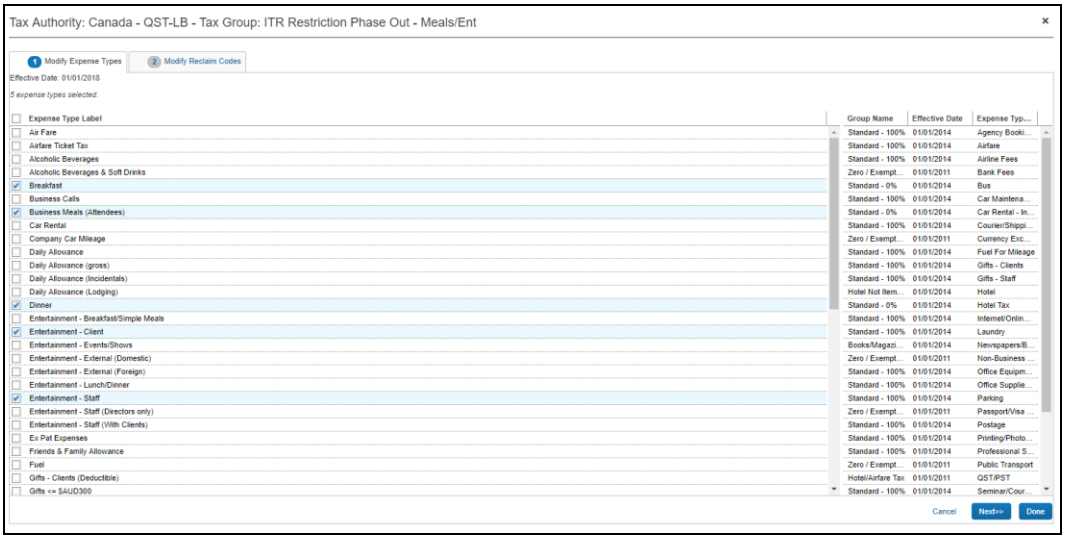
To modify the VAT configuration (after activation):

1. On the **Taxation** tab, click **View** in the **Tax Groups** column for the activated tax authority. The **Tax Groups** page appears, showing the full configuration for the various expense type groups.

2. Select the **Canada – QST-LB Tax Authority** tax group and click **Modify**.



3. Clear the check boxes for the following expense types: **Breakfast, Business Meals (Attendees) Mobile/Cellular Phone, Telephone/Fax, Business Calls, Fuel, Car Rental, Lunch, Dinner, Snacks/Beverages,** and **Entertainment – Client, Entertainment – Staff.**

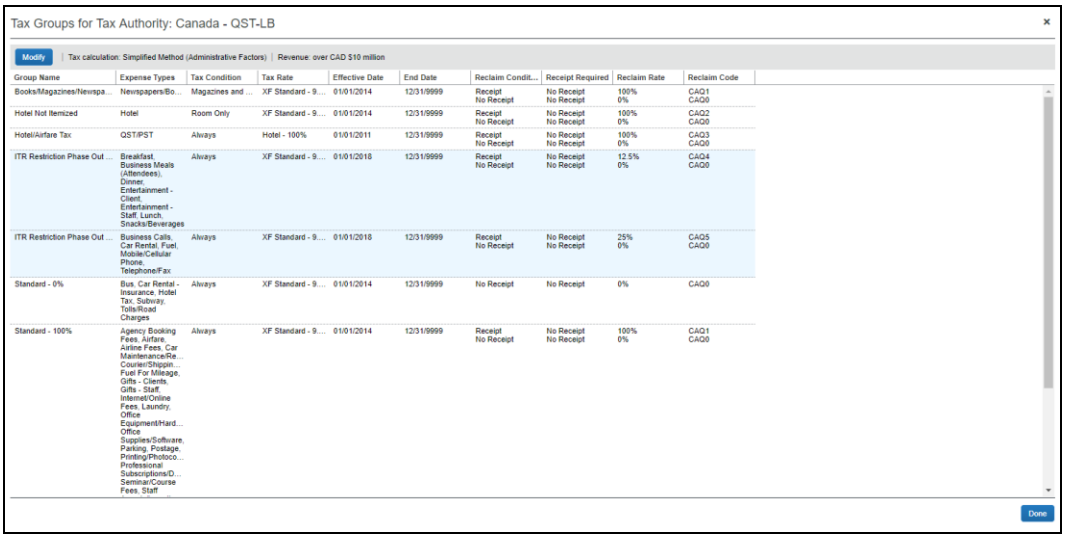


4. Click **Done**.

5. Modify the **ITR Restriction Phase Out – Standard** group by assigning the following expense types: **Mobile Phone, Telephone/Fax, Business Calls,** and **Fuel & Car Rental.**

6. Click **Done**.

7. Modify the **ITR Restriction Phase Out – Meals/Ent** group by assigning the following expense types: **Breakfast, Business Meals (Attendees), Lunch, Dinner, Snacks/Beverages,** and **Entertainment Client & Entertainment – Staff.**



Group Name	Expense Types	Tax Condition	Tax Rate	Effective Date	End Date	Reclaim Condit...	Receipt Required	Reclaim Rate	Reclaim Code
Books/Magazines/Newspa...	Newspapers/Bo...	Magazines and ...	XF Standard - 9....	01/01/2014	12/31/9999	Receipt No Receipt	No Receipt No Receipt	100% 0%	CAQ1 CAQ0
Hotel Not Itemized	Hotel	Room Only	XF Standard - 9....	01/01/2014	12/31/9999	Receipt No Receipt	No Receipt No Receipt	100% 0%	CAQ2 CAQ0
Hotel/Airfare Tax	QST/PST	Always	Hotel - 100%	01/01/2011	12/31/9999	Receipt No Receipt	No Receipt No Receipt	100% 0%	CAQ3 CAQ0
ITR Restriction Phase Out ...	Breakfast, Business Meals (Attendees), Dinner, Entertainment - Client, Entertainment - Staff, Lunch, Snacks/Beverages	Always	XF Standard - 9....	01/01/2018	12/31/9999	Receipt No Receipt	No Receipt No Receipt	12.5% 0%	CAQ4 CAQ0
ITR Restriction Phase Out ...	Business Calls, Car Rental, Fuel, Mobile/Cellular Phone, Telephone/Fax	Always	XF Standard - 9....	01/01/2018	12/31/9999	Receipt No Receipt	No Receipt No Receipt	25% 0%	CAQ5 CAQ0
Standard - 0%	Bus, Car Rental - Insurance, Hotel Tax, Subway, Tolls/Road Charges	Always	XF Standard - 9....	01/01/2014	12/31/9999	No Receipt	No Receipt	0%	CAQ0
Standard - 100%	Agency Booking Fees, Airfare, Airline Fees, Car Maintenance/Re... Courier/Shippin... Fuel For Mileage, Gifts - Clients, Gifts - Staff, Internet/Online Fees, Laundry, Office Equipment/Hard... Office Supplies/Software, Parking, Postage, Printing/Photoco... Professional Subscriptions/D... Seminar/Course Fees, Staff	Always	XF Standard - 9....	01/01/2014	12/31/9999	Receipt No Receipt	No Receipt No Receipt	100% 0%	CAQ1 CAQ0

8. Click **Done**.

For general information about this functionality, refer to the *Expense: Taxation Setup Guide for Concur Standard Edition*.

Planned Changes

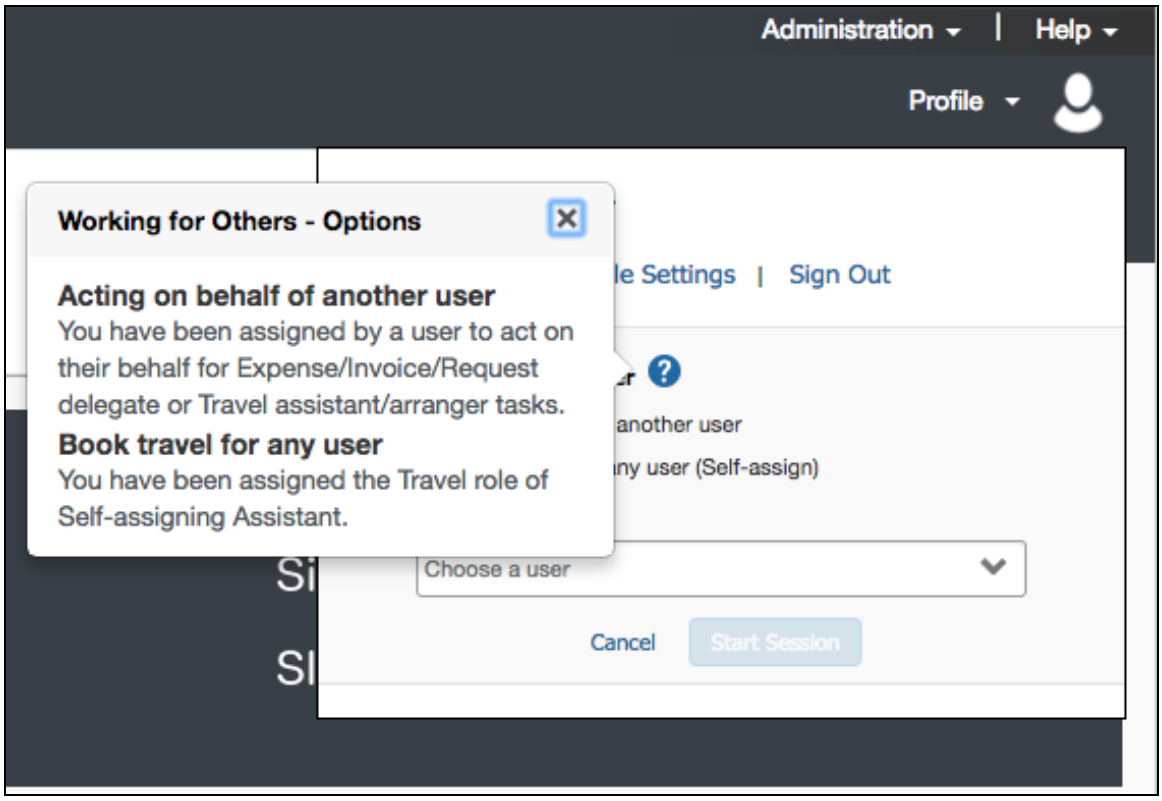
The items in this section are targeted for future releases. Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

Accessibility

Planned Changes Keyboard Access for Working for Others Quick Help

Overview

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



BUSINESS PURPOSE/CLIENT BENEFIT

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

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

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

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

Overview

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

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

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

Planned Changes Remove All Instances of "ConcurAccessible"

Overview

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

This ensures a consistent, better experience for all users.

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

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

Admin

Planned Changes Removing the "Privacy Agreement" Page

Overview

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

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

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

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

FAQs

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

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

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

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

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

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

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

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

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

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

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

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

Q. Who can I contact for more information?

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

Configuration / Feature Activation

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

Data Retention

Planned Changes New Feature for Outdated Data

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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

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

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

Configuration/Feature Activation

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

Expense Reports

Planned Changes Check for Missing Account Code Later in Workflow

Overview

Employees will be able to save, submit, and approve an expense report even if one or more account codes are missing for expenses in the report.

Currently, whenever an expense is saved, the system validates that an account code has been provided for the related expense type and adds that account code to the expense (a process not visible through the UI). If there is no account code associated with the expense, the expense cannot be saved.

With this update, the report can be submitted and approved. However, the system will block the expense data from being extracted or posted to your financial system until your Concur company administrator provides an account code mapping for the expense type in Product Settings.

BUSINESS PURPOSE/CLIENT BENEFIT

Employees are no longer prevented from completing their expense reports when an account code is missing in the expense type configuration. Account codes are now populated at a single, consistent point in the workflow.

Configuration/Feature Activation

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

In-Product Messaging (IPM)

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

Overview

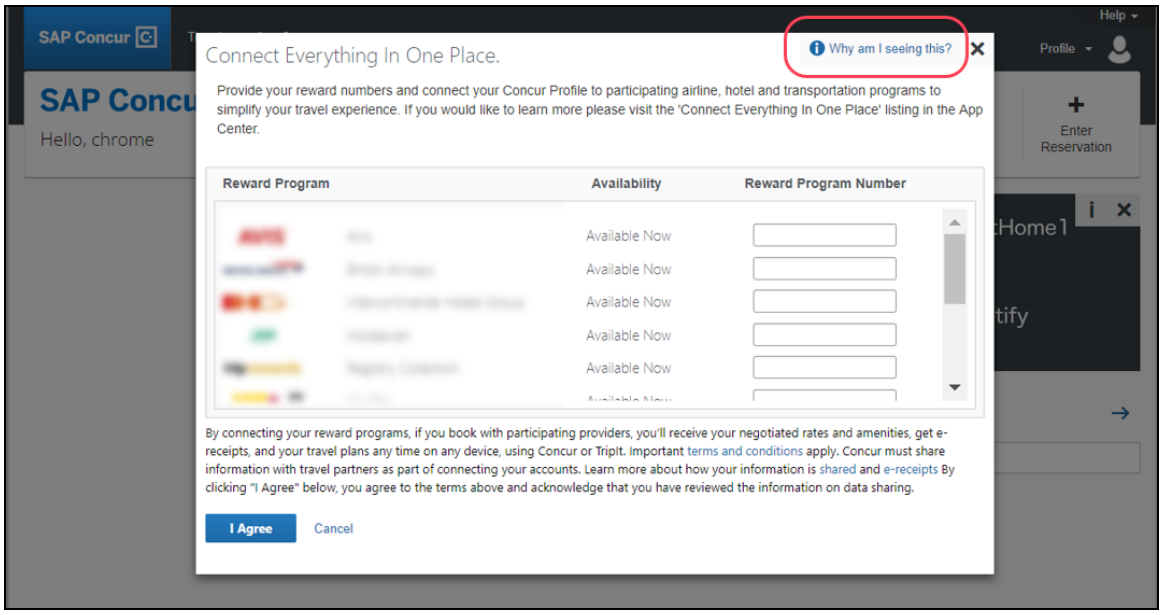
Last year, when In-Product Messaging (IPM) was introduced in Europe, the feature included the ability for users to opt out of messaging.

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

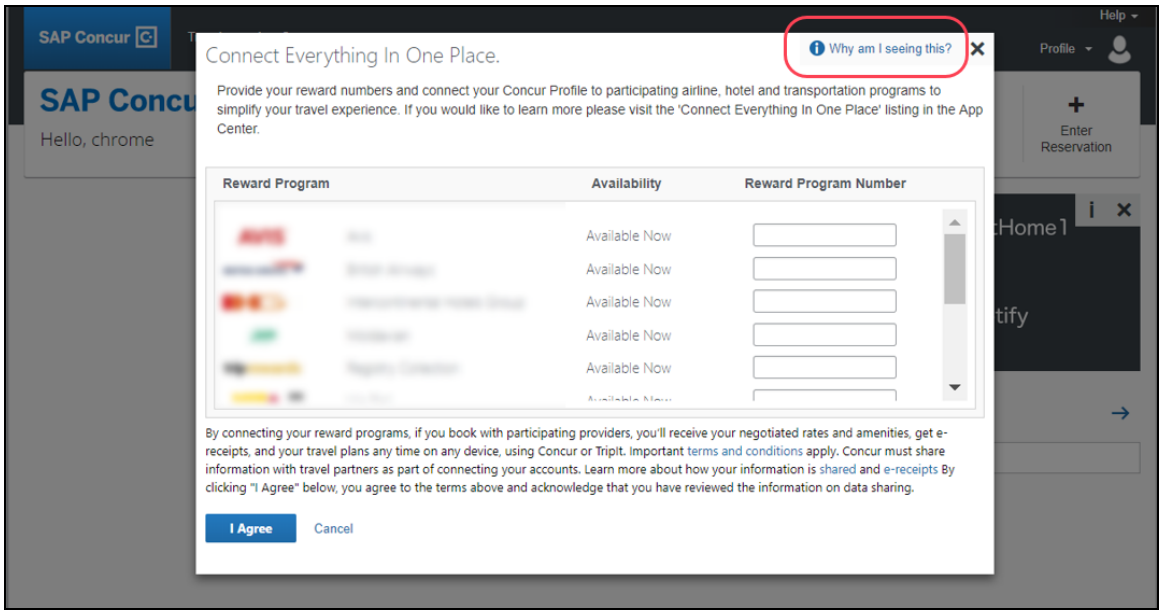
What the User Sees

MESSAGES

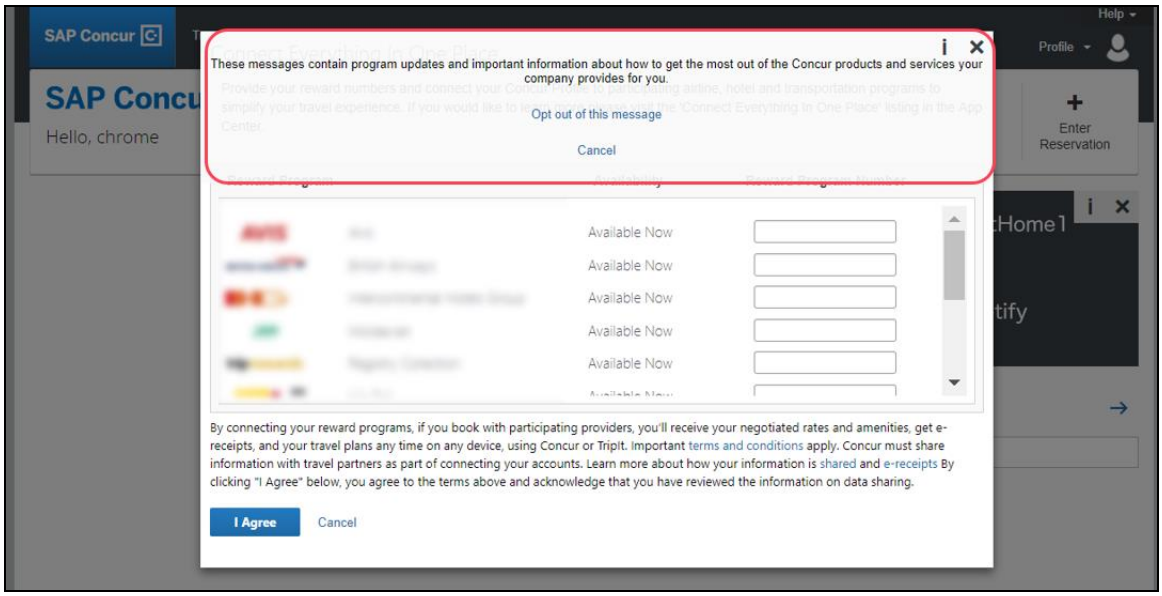
An information icon appears in the upper-right corner of the message.



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



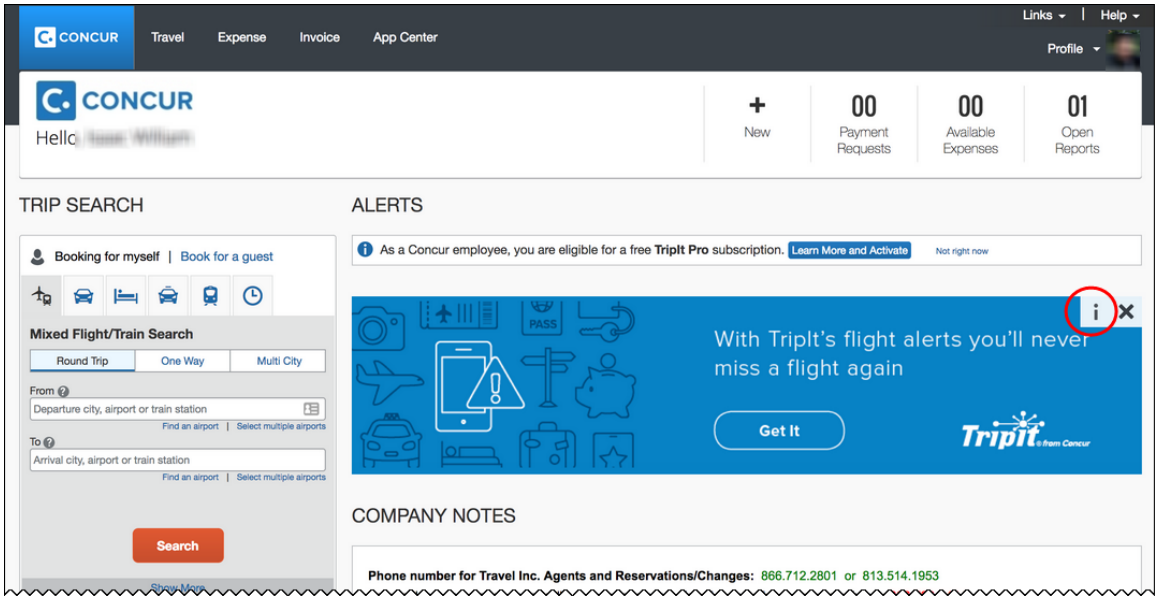
When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other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



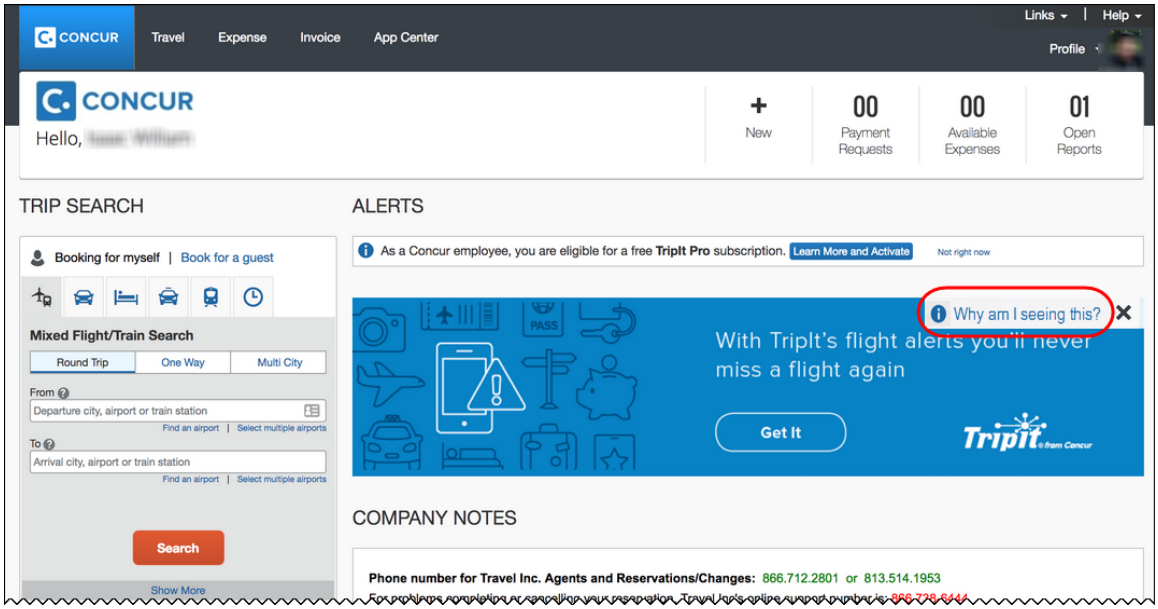
When the user clicks the close button (X in the upper-right corner), the window closes.

In-Page Messages

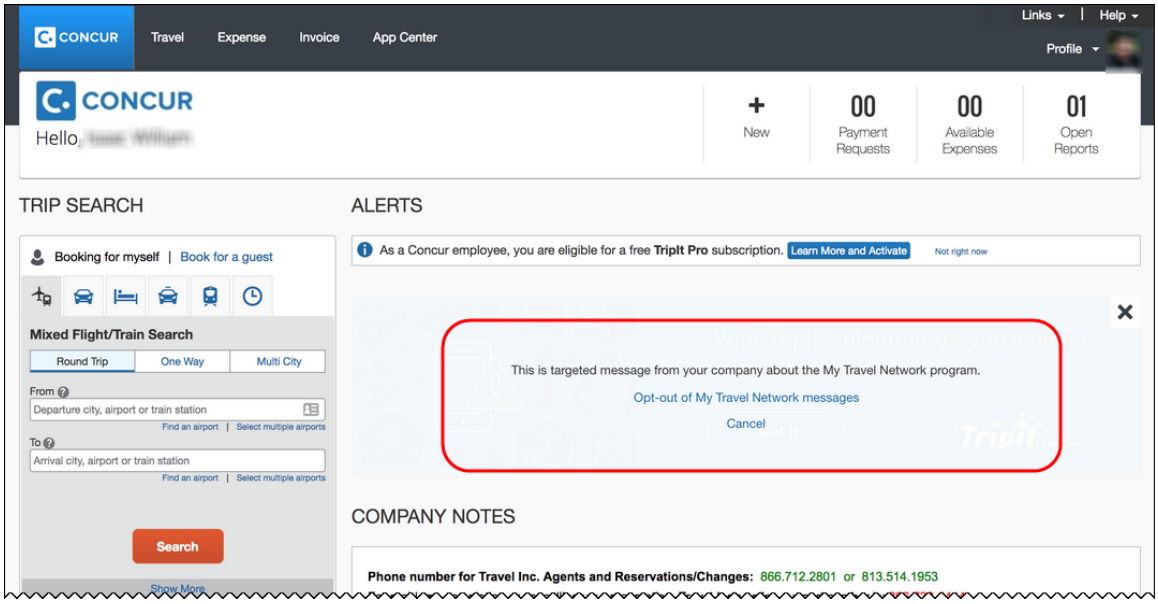
An information icon appears in the upper-right corner of the message.



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



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



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

Configuration / Feature Activation

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

New Filter

Planned Changes New 23-Month Filter

Overview

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

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

- Available Expenses
- View transactions
- Unassigned Cash Advances

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

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

Plain Text File Transfer Protocol (FTP)

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

Overview

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

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

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

What This Means – The Client Experience

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

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

📖 For more information, please refer to the *File Transfer User Guide*.

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

Product Settings

Planned Changes Category List Will Display Spend Category Suggestions

Overview

The **Category** list on the **Expense Types** page (**Expense > Expense Types**) in Product Settings will show spend category suggestions at the top of the list.

BUSINESS PURPOSE/CLIENT BENEFIT

This update simplifies the spend category selection process for expense types.

What the Admin Sees

When an administrator is assigning spend categories to expense types and opens the **Category** list for an expense type, the most commonly selected spend categories will be displayed at the top of the list.

Additional information will be available in future release notes.

Configuration/Feature Activation

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

Client Notifications

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: Concur Non-Affiliated Subprocessors

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

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

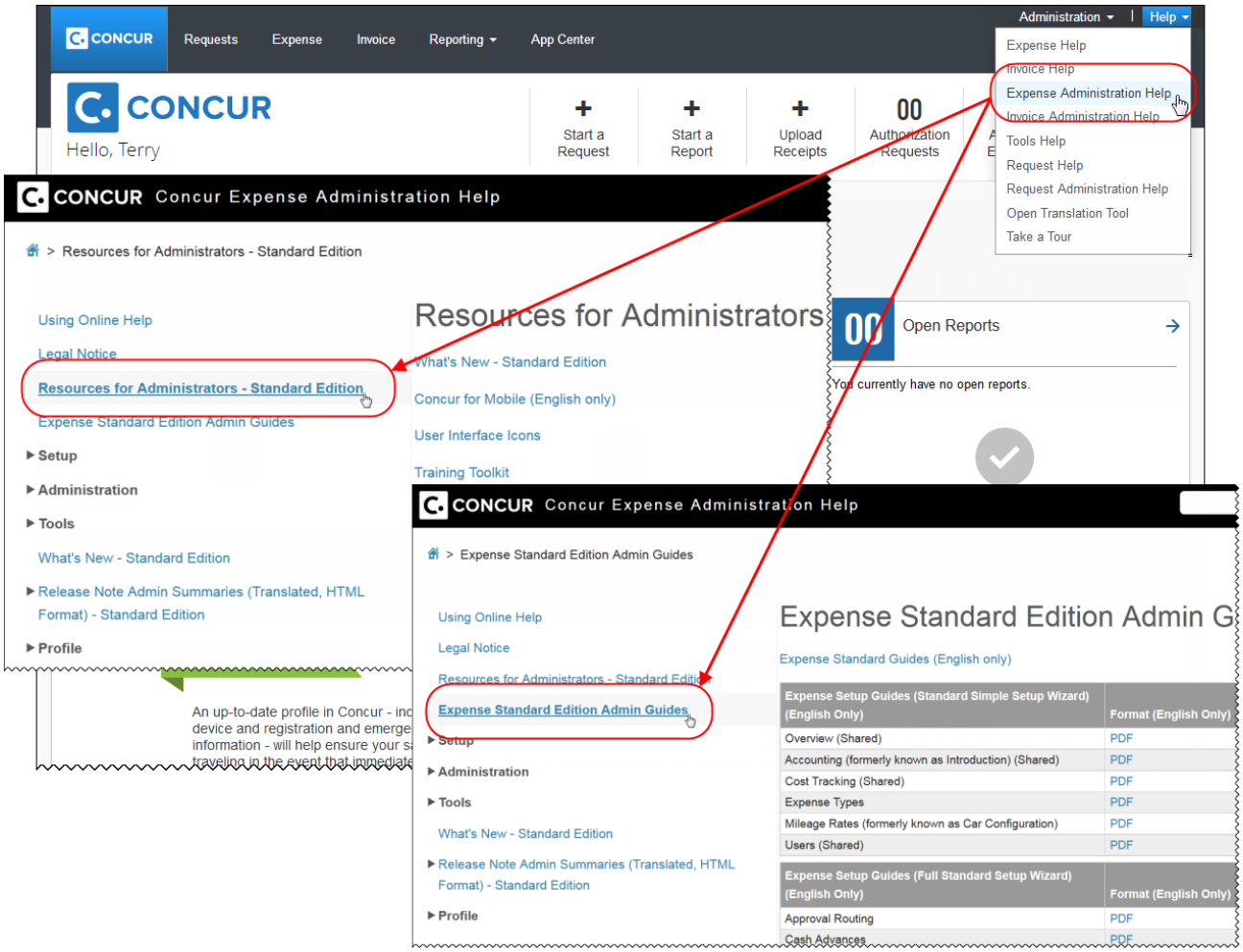
The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

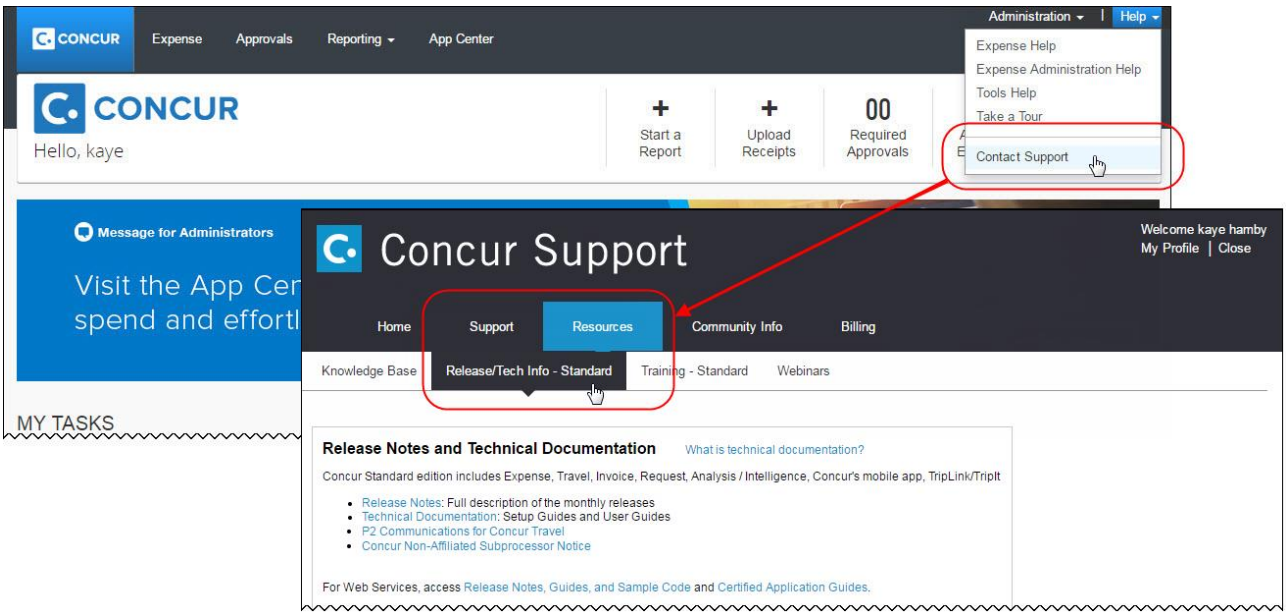
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: March 17, 2018 Initial Post: Friday, March 16, 12:30 PM PT	Client – FINAL

Contents

Release Notes

This section contains the release notes for the Expense functionality of Concur Standard Edition. Clients with other products should review those release notes, located on the Concur Support portal.

Accessibility

Alternative Text for the Logo on the Sign In Page

Overview

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

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There is no visual change for the user.

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Keyboard Access for Working for Others Quick Help

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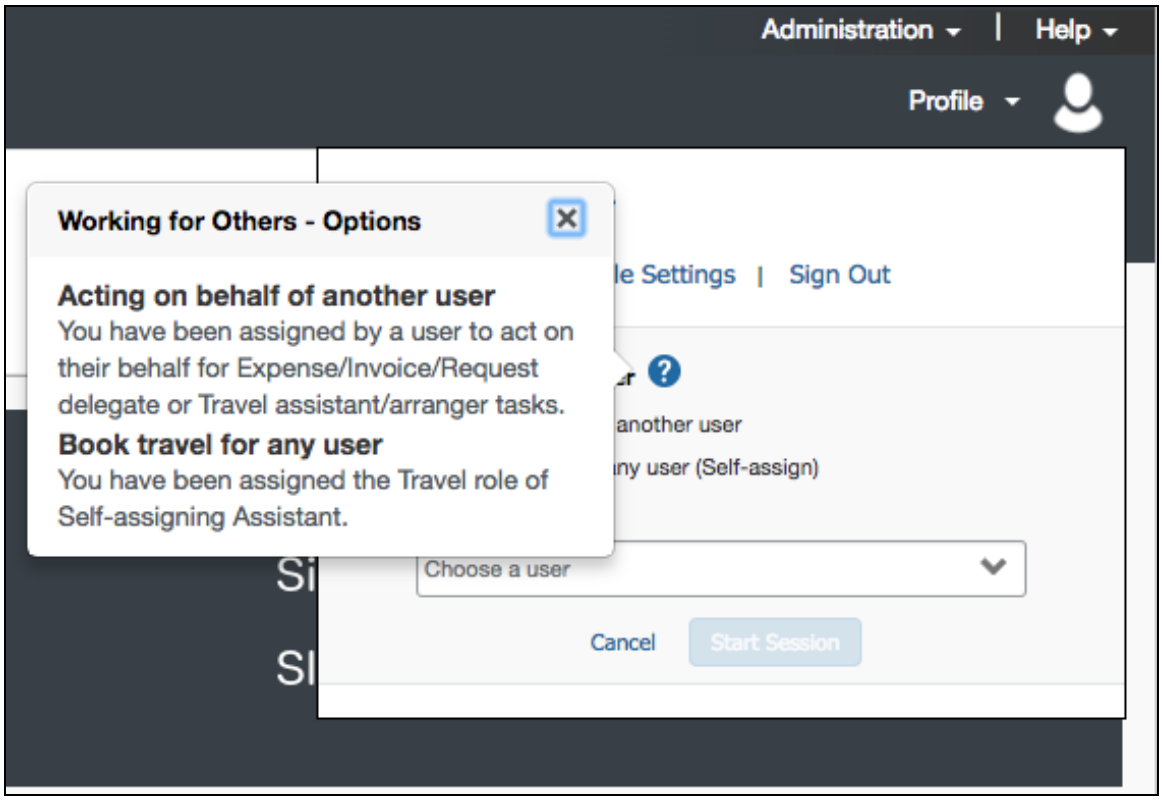


BUSINESS PURPOSE/CLIENT BENEFIT

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

What the User Sees

There is no visual change for the user.

Configuration / Feature Activation

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

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

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

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

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

Next Steps

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

Users by Browser Report Updated

Overview

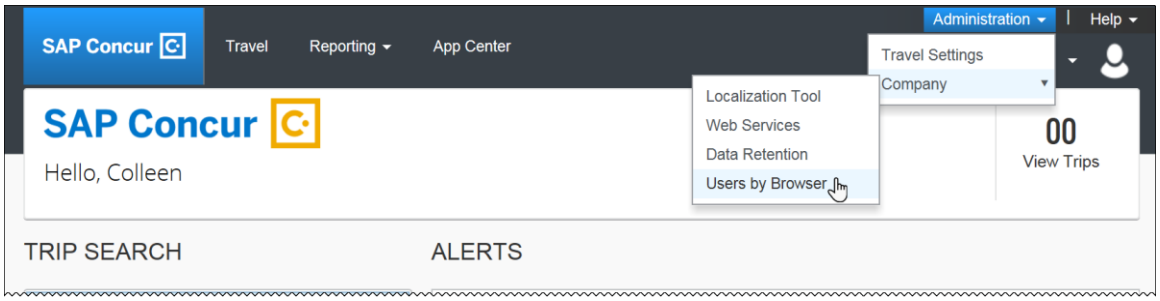
The Users by Browser report has been updated to include more information – all in one place. It now lists all users as well as their browsers and login count.

BUSINESS PURPOSE / CLIENT BENEFIT

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

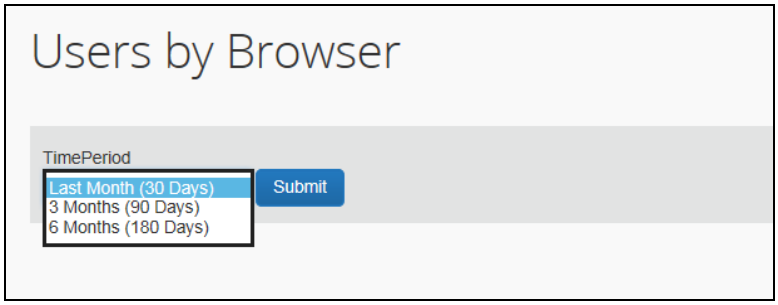
What the Admin Sees

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

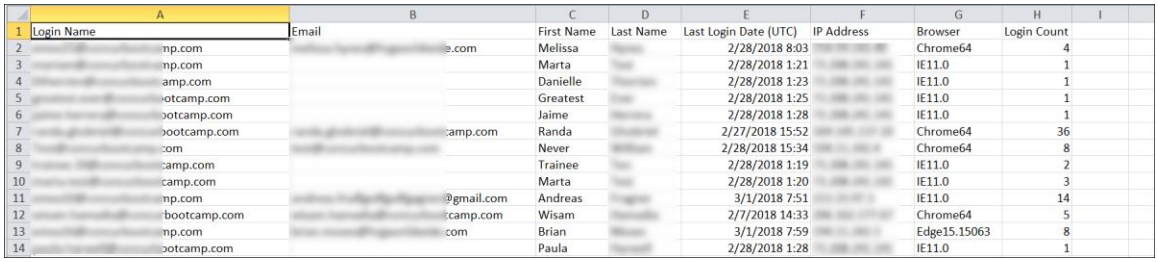


The **Users by Browser** page appears.

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



The report is generated in CSV format.



Login Name	Email	First Name	Last Name	Last Login Date (UTC)	IP Address	Browser	Login Count
[redacted]np.com	[redacted]e.com	Melissa	[redacted]	2/28/2018 8:03	[redacted]	Chrome64	4
[redacted]np.com		Marta	[redacted]	2/28/2018 1:21	[redacted]	IE11.0	1
[redacted]amp.com		Danielle	[redacted]	2/28/2018 1:23	[redacted]	IE11.0	1
[redacted]otcamp.com		Greatest	[redacted]	2/28/2018 1:25	[redacted]	IE11.0	1
[redacted]ootcamp.com		Jaime	[redacted]	2/28/2018 1:28	[redacted]	IE11.0	1
[redacted]bootcamp.com	[redacted]camp.com	Randa	[redacted]	2/27/2018 15:52	[redacted]	Chrome64	36
[redacted]com	[redacted]	Never	[redacted]	2/28/2018 15:34	[redacted]	Chrome64	8
[redacted]camp.com		Trainee	[redacted]	2/28/2018 1:19	[redacted]	IE11.0	2
[redacted]camp.com		Marta	[redacted]	2/28/2018 1:20	[redacted]	IE11.0	3
[redacted]np.com	[redacted]@gmail.com	Andreas	[redacted]	3/1/2018 7:51	[redacted]	IE11.0	14
[redacted]bootcamp.com	[redacted]camp.com	Wisam	[redacted]	2/7/2018 14:33	[redacted]	Chrome64	5
[redacted]np.com	[redacted]com	Brian	[redacted]	3/1/2018 7:59	[redacted]	Edge15.15063	8
[redacted]ootcamp.com		Paula	[redacted]	2/28/2018 1:28	[redacted]	IE11.0	1

Configuration / Feature Activation

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

Budget

New Budget Feature Generally Available March 19, 2018

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

Overview

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

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

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

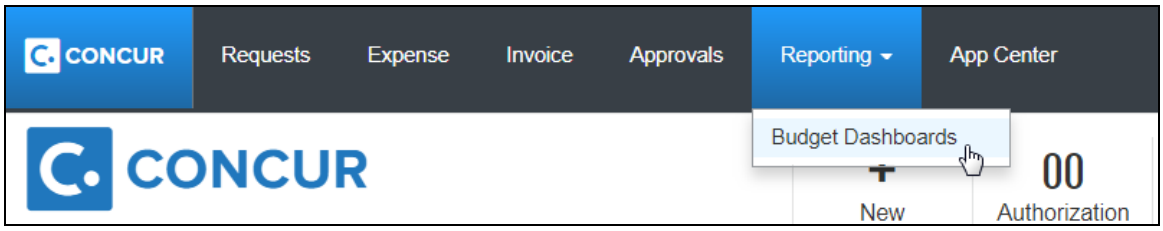
In addition, the Budget feature is available for the Concur mobile app for Expense. Please note that the release for the Concur mobile app occurs seven to ten days after the regular release.

BUSINESS PURPOSE/CLIENT BENEFIT

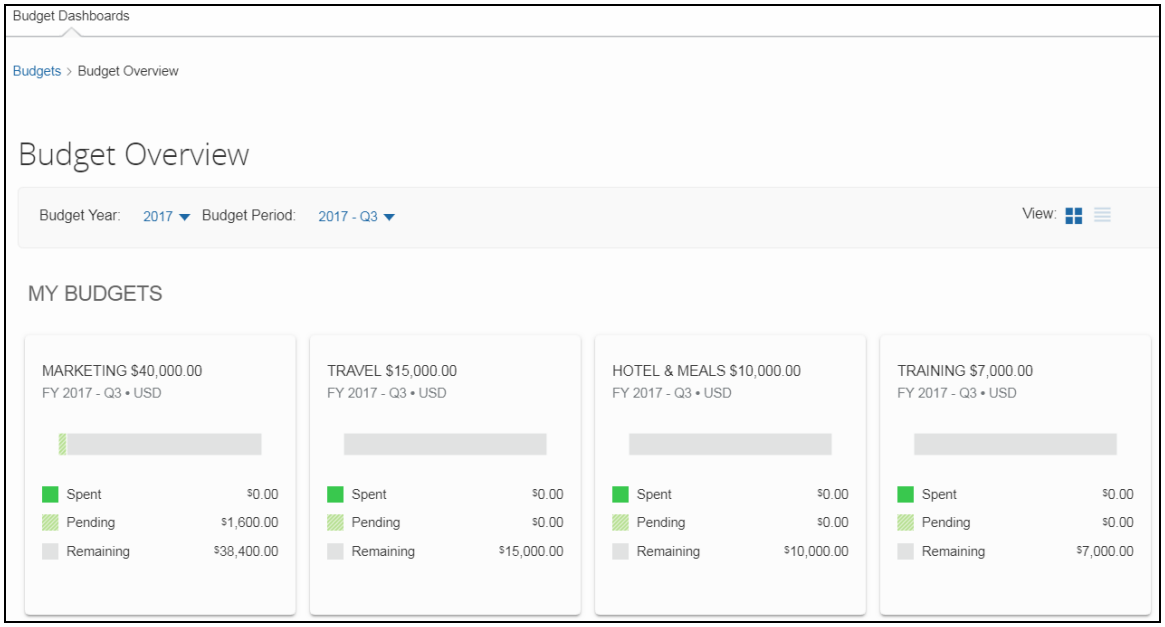
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Expense clients.

What the User Sees

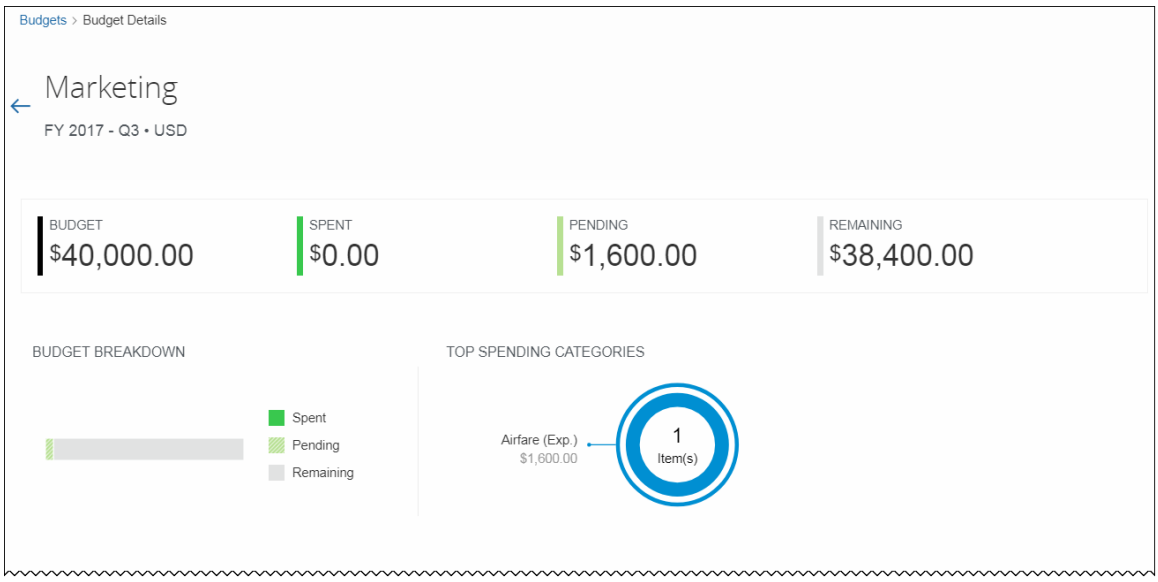
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.

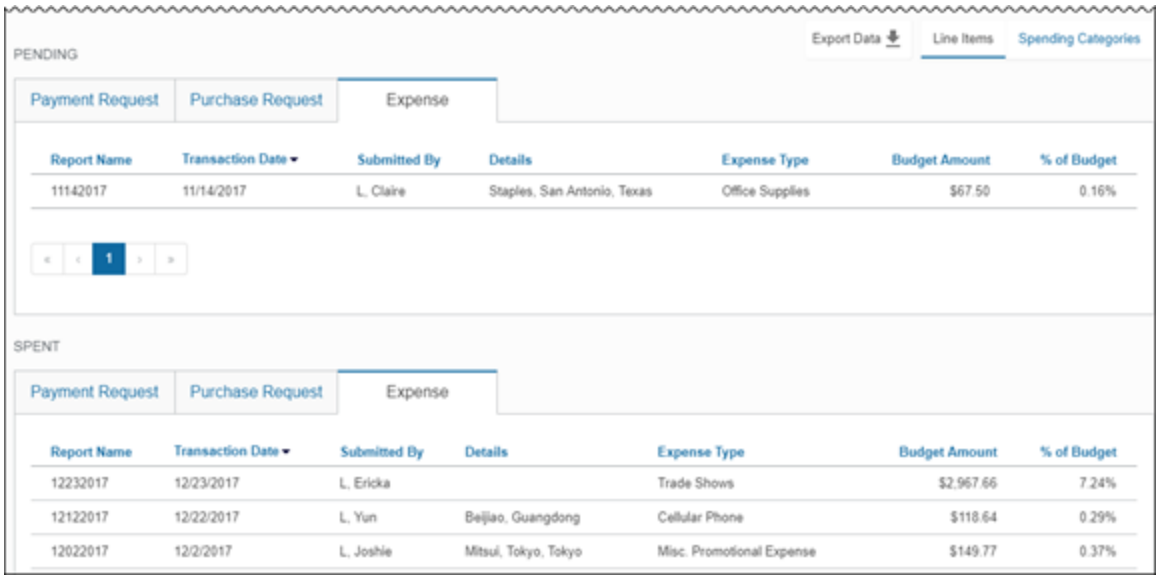


Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



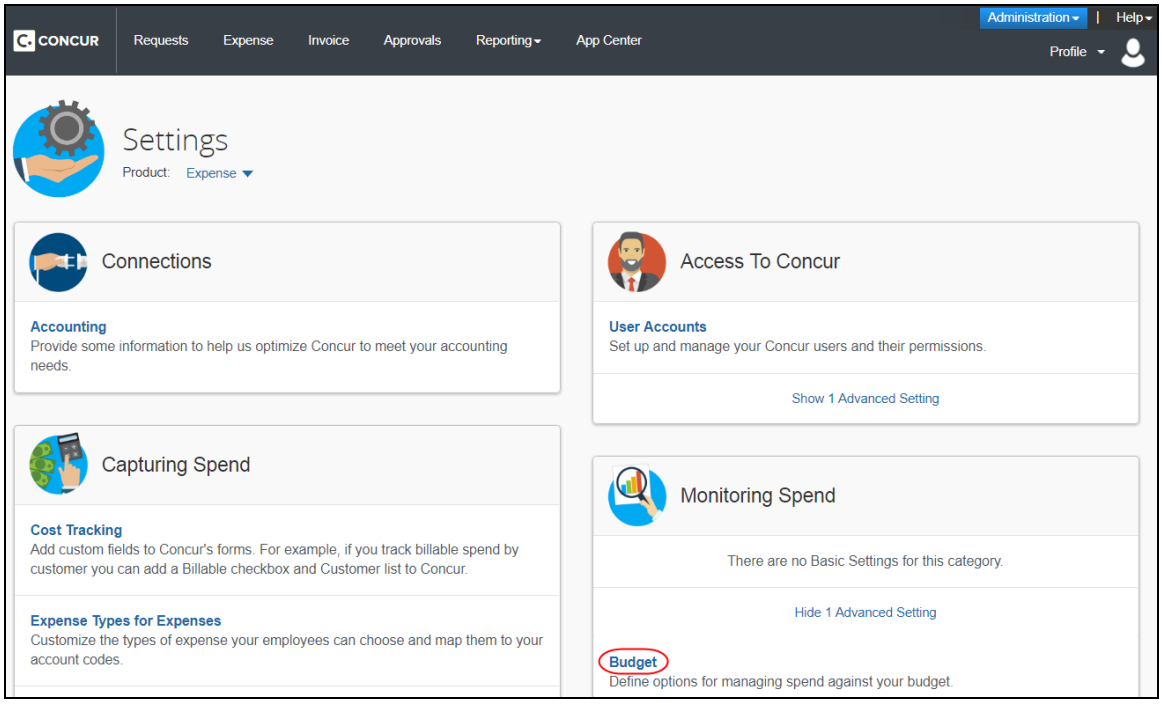
Clicking on one of the budget will show details about that budget.





What the Admin Sees

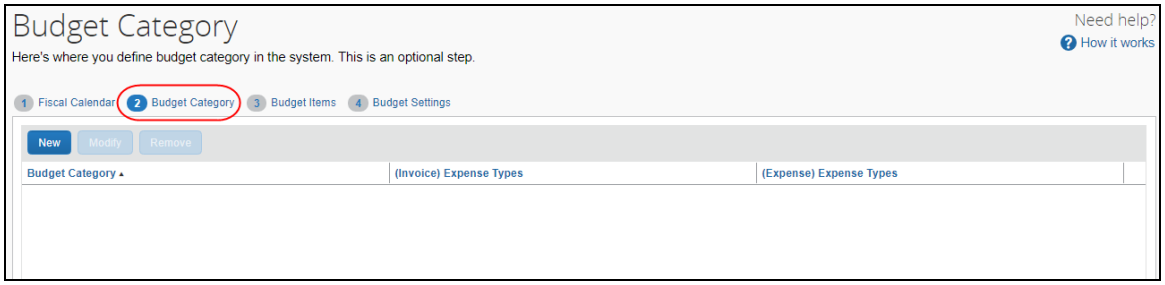
The admin will see a new setting, **Budget**, in the **Monitoring Spend** section of Product Settings.



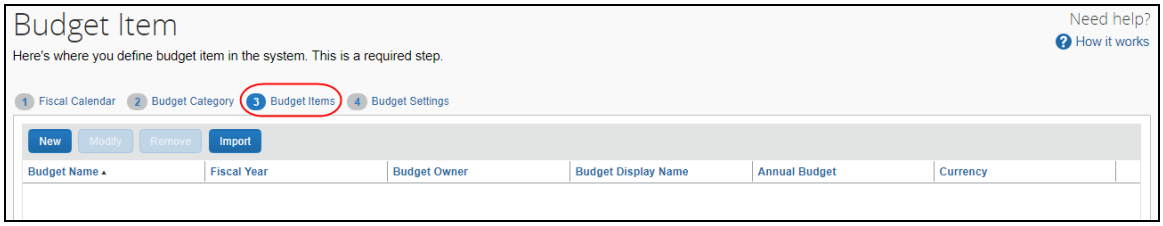
By clicking the **Budget** link, admins will be taken to the configuration pages of Budget.

Fiscal Calendar tab:

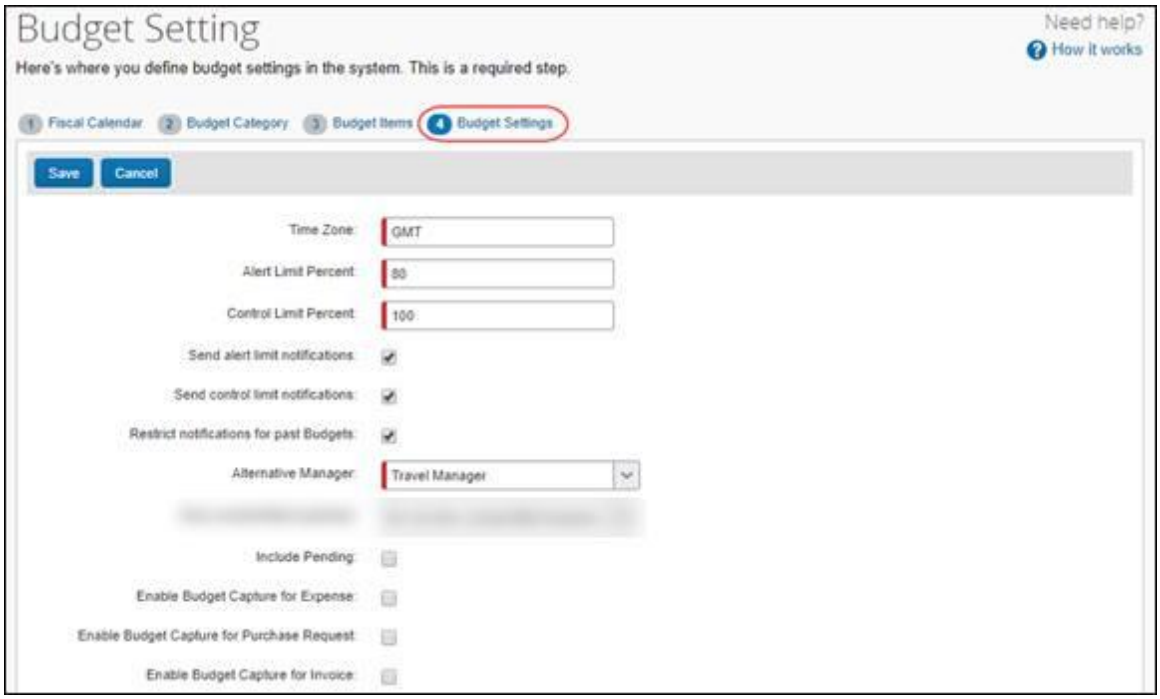
Budget Category tab:



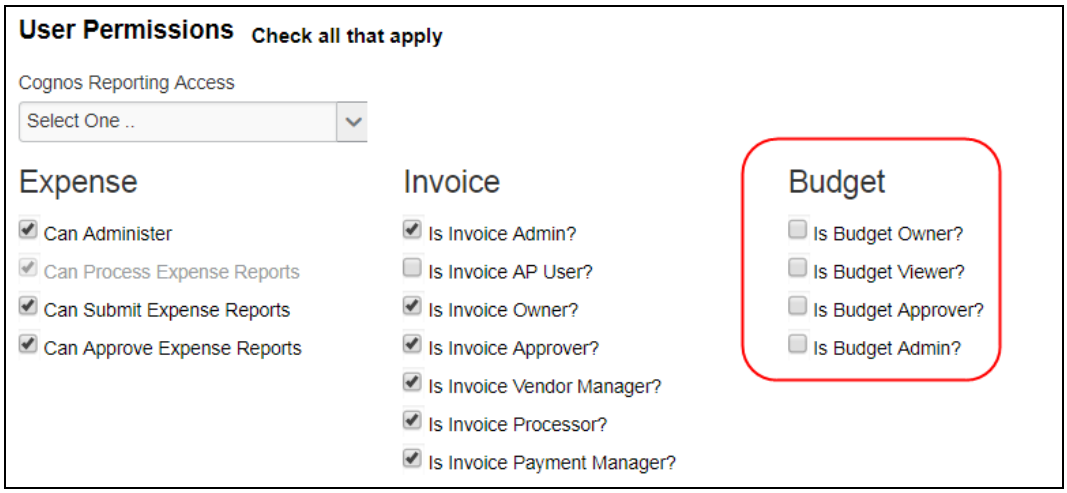
Budget Items tab:



Budget Settings tab:



In addition, by clicking the **User Accounts** link in the **Access To Concur** section of Product Settings, the admin will see the available Budget roles on the **Users** page.



Configuration/Feature Activation

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

Once Concur has activated Budget, the Budget Administrator needs to configure the feature by clicking **Administration** > **Expense Settings** or **Expense & Invoice Settings**, and then in the **Monitoring Spend** section, clicking **Budget**.

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

Expense Pay

Consent Term Clarified from "Agree" to "Authorize"

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

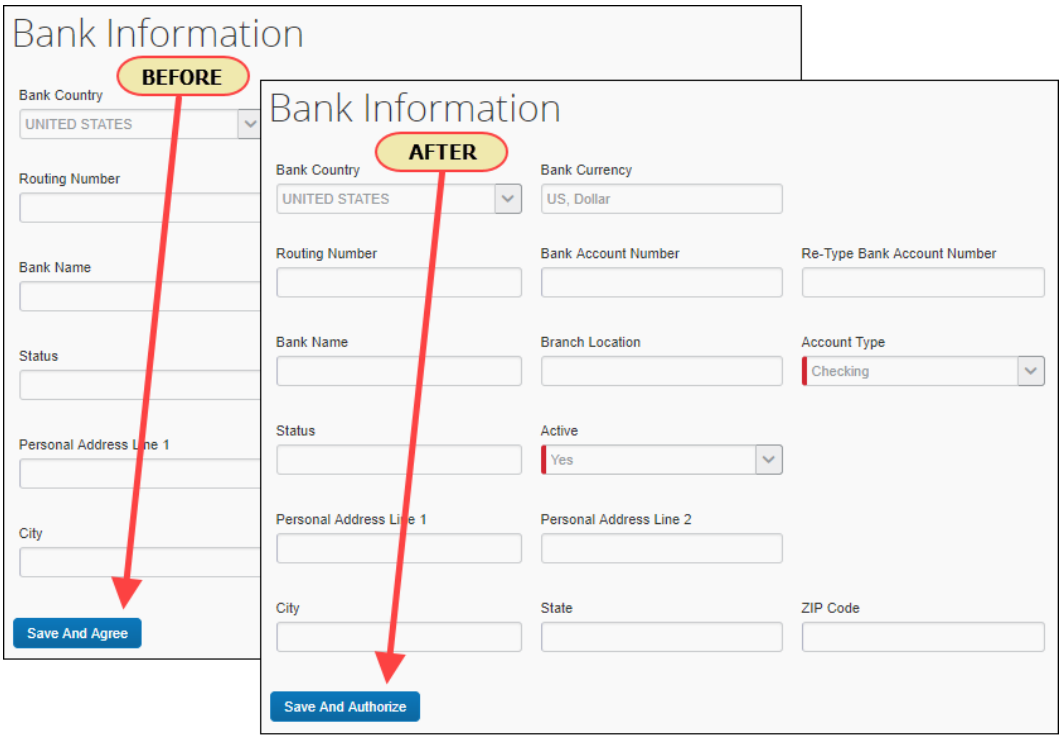
This change provides greater legal clarity for the instruction that users authorize direct deposits from Concur for classic Expense Pay or a Concur payment-processing partner for Expense Pay - Global.

What the User Sees

EXPENSE PAY – CLASSIC

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

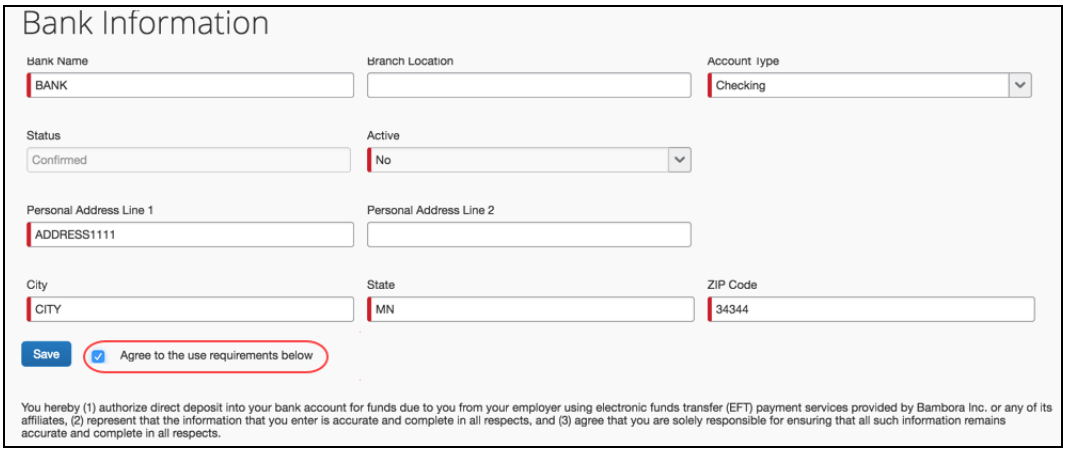
- On the **Profile > Profile Settings > Bank Information** page, the button that read, "Save And Agree," now reads, "Save And Authorize."



EXPENSE PAY – GLOBAL

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

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



Configuration/Feature Activation

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

Expense Reports

Check for Missing Account Code Later in Workflow

Overview

Employees can now submit an expense report even if one or more account codes are missing for expenses in the report. However, the expense report cannot be approved by the processor until an account code is provided.

Before this update, employees could not submit an expense report if one or more account codes were missing for expenses in the report.

Whenever an expense is saved, the system inserts the correct account code for the expense type (based on the account code configuration in Product Settings). With this update, the report can now be submitted even when no account code has been mapped to the expense type. The expense report can also be approved by the manager.

When the processor attempts to approve the report, the system identifies that an account code is missing, checks the expense type account codes configuration to see if an account code has been added since the expense was last saved. If available, the system inserts the correct account code and continues with approval. If not available, the system blocks the expense data from being approved until your Concur company administrator provides an account code mapping for the expense type.

NOTE: If a client is using a custom workflow that has no processor step in their expense report approval workflow, they will not see any changes to the workflow, even if one or more account codes are missing for expenses in the expense report.

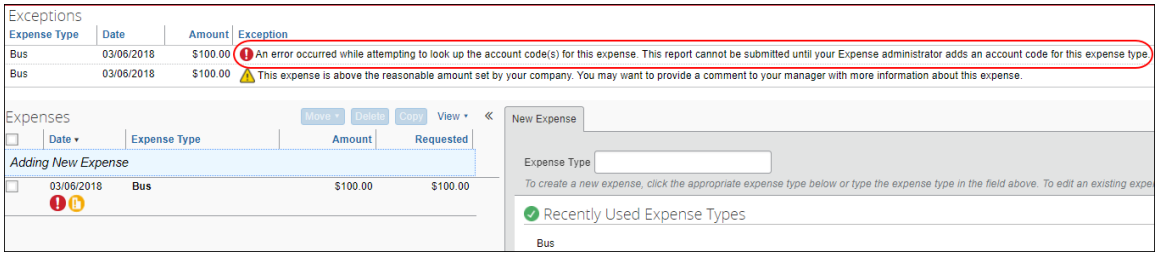
BUSINESS PURPOSE/CLIENT BENEFIT

Employees are no longer prevented from completing their expense reports when an account code is missing in the expense type configuration.

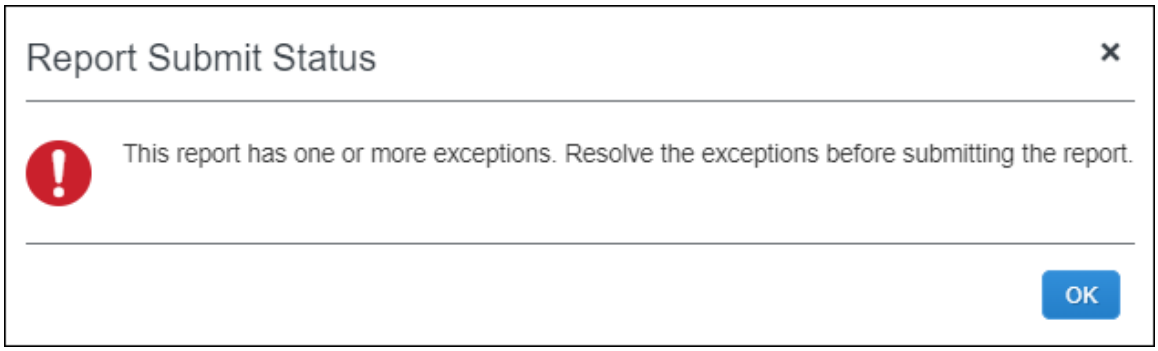
What the Expense Report Submitter Sees

Before this release, if an employee created an expense report containing an expense not associated with an account code, the following exception error was displayed to the employee when the expense report was saved:

An error occurred while attempting to look up the account code(s) for this expense. This report cannot be submitted until your Expense administrator adds an account code for this expense type.

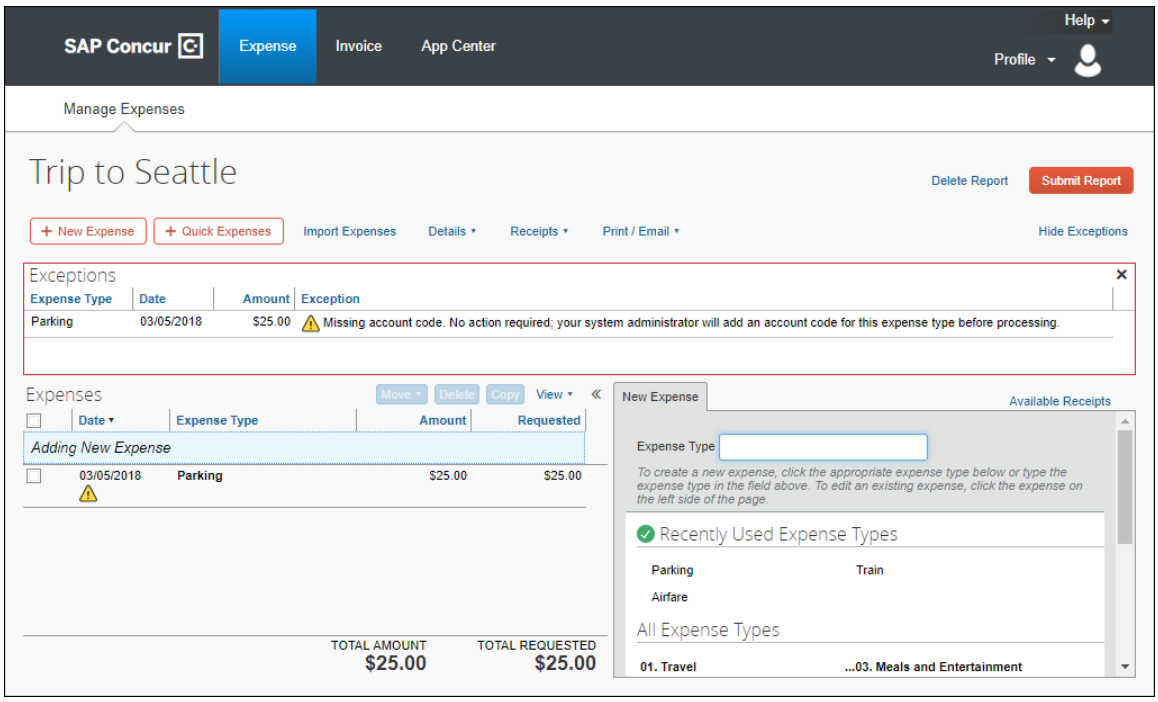


If the employee tried to submit an expense report containing an expense not associated with an account code, the following message was displayed when the employee clicked the **Submit Report** button, and the expense report could not be submitted:

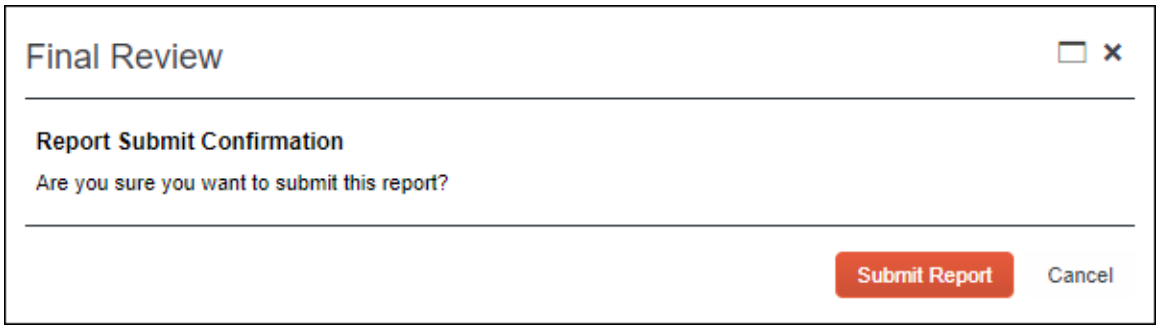


With this release, if an employee creates an expense report containing an expense not associated with an account code, the following warning message is displayed when the expense report is saved:

Missing account code. No action required; your system administrator will add an account code for this expense type before processing.



If the employee clicks the **Submit Report** button for an expense report containing an expense associated with an account code, the following message is displayed.

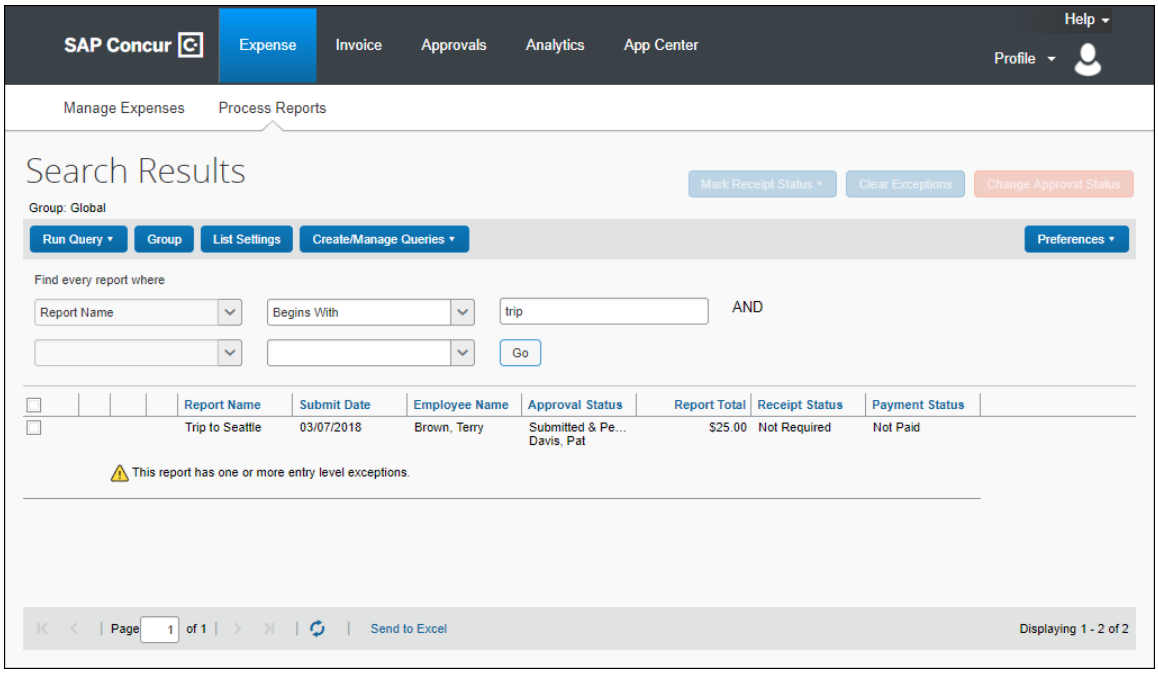


Clicking the **Submit Report** button on the message dialog submits the export report for approval. The employee is not prevented from submitting the export report.

What the Expense Report Approver Sees

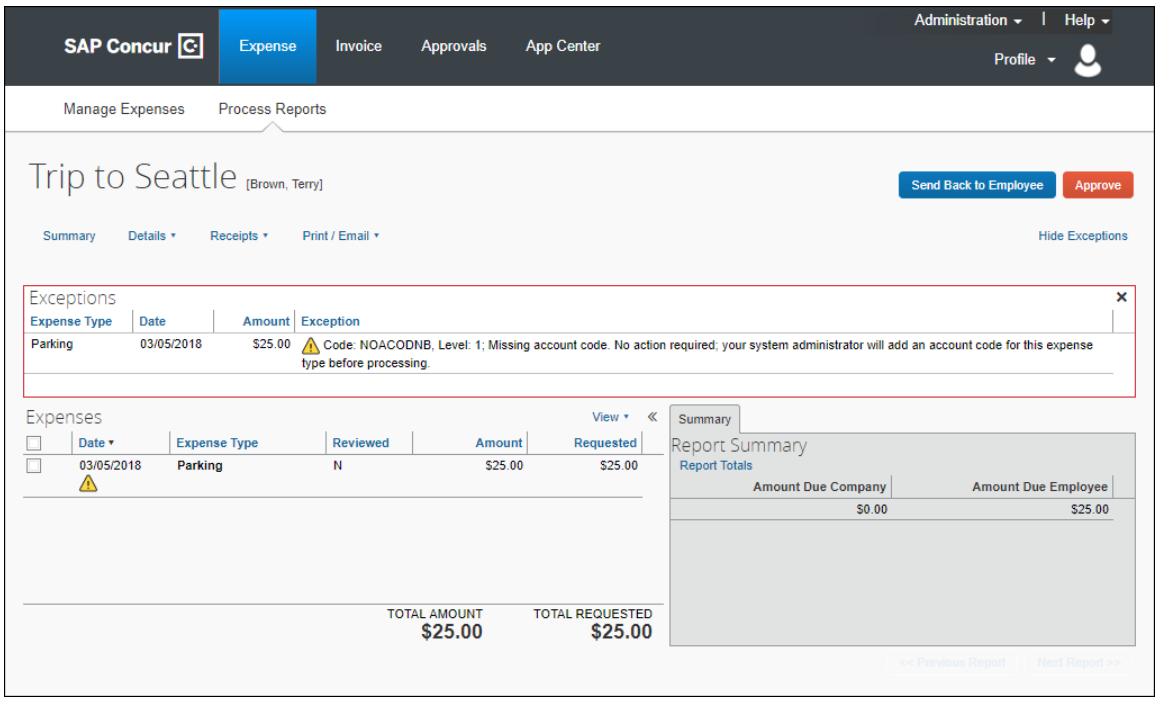
With this release, if an employee submits an expense report containing an expense not associated with an account code, the expense report approver will see the following warning message displayed for the expense report on the **Search Results** page in Process Reports:

This report has one or more entry level exceptions.

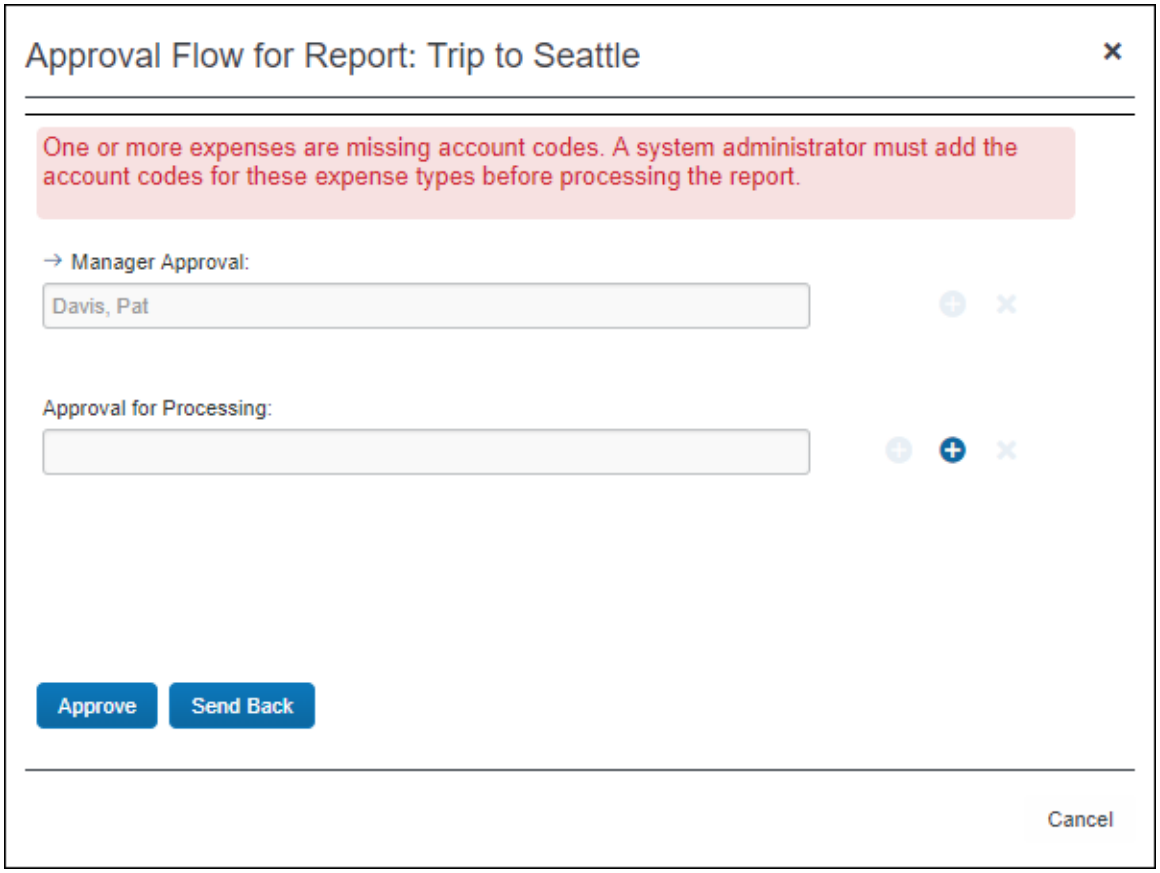


When the expense report approver opens the submitted expense report, the following warning message is displayed for the expense not associated with an account code:

Code: NOACODNB, Level: 1; Missing account code. No action required; your system administrator will add an account code for this expense type before processing.



If an expense report approver attempts to approve the expense report before an account code is mapped to the expense type associated with the expense type, the following message appears after clicking the **Approve** button:



Once your Concur company administrator maps the account codes to the applicable expense types in Product Settings, the expense report approver can approve the expense report.

NOTE: After the account codes are mapped to the applicable expense types, the warning message will continue to be displayed for the expense report on the **Process Reports** page, but the expense report approver will no longer be prevented from approving the expense report.

Configuration/Feature Activation

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

Next Generation (NextGen)

Expense User Interface

New User Interface for Concur Expense End Users

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

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

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

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

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

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

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

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

- **End-User guide:** This guide compares the existing UI to NextGen Expense to help users become comfortable with the new experience. This guide will be

updated regularly during the Preview Period as the UI is being finalized and enhanced. Admins should review the guide often.

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

Value Added Tax (VAT)

(UK) Updated HMRC Fuel Advisory Rates

Overview

Concur has updated Value Added Tax (VAT) rates in accordance with Her Majesty's Revenue and Customs (HMRC) Advisory Fuel Rates (AFRs).

Changes for petrol vehicle types:

- Over 2000cc → 22 pence

BUSINESS PURPOSE/CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

From March 1, a new rate displays by clicking **View** on the **Taxation –VAT Tracking** page of Product Settings.

Tax Groups for Tax Authority: United Kingdom

Group Name	Expense Types	Tax Condition	Tax Rate
Car Rental Tax Group	Car Rental	Always	Standard - 20%
Individual Meals	Breakfast, Dinner, Individual Meals, Lunch	UK VAT UK Partial	Standard - 20% Partial - 0%
Internet/Online	Internet/Online Fees	UK 100% UK 0%	Standard - 20% Exempt/Zero - 0%
Mileage	Company Car Mileage, Personal Car Mileage	Petrol - Over 2000cc Petrol - 1401cc to 2000cc Petrol - 1400cc or less Diesel - Over 2000cc Diesel - 1601cc to 2000cc Diesel - 1600cc or less	GB Petrol - Over 2000cc - 0.2200 GBP @ 20% GB Petrol - 1401cc to 2000cc - 0.1400 GBP @ 20% GB Petrol - 1400cc or less - 0.1100 GBP @ 20% GB Diesel - Over 2000cc - 0.1300 GBP @ 20% GB Diesel - 1601cc to 2000cc - 0.1100 GBP @ 20% GB Diesel - 1600cc or less - 0.0900 GBP @ 20%
Non-Reclaimable	Entertainment - Client Gifts	UK	Standard - 20%

Configuration/Feature Activation

The **Taxation** page automatically displays the new rates; there are no additional configuration or activation steps.

NOTE: Any existing clients will need to make the change themselves as clients manage expense type tax group mapping.

Planned Changes

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

Accessibility

Planned Changes Remove All Instances of "ConcurAccessible"

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

Admin

Planned Changes Removing the "Privacy Agreement" Page

Overview

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

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

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

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

FAQs

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

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

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

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

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

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

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

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

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

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

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

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

Q. Who can I contact for more information?

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

Configuration / Feature Activation

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

Data Retention

Planned Changes New Feature for Outdated Data

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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

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

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

Configuration/Feature Activation

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

In-Product Messaging (IPM)

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

Overview

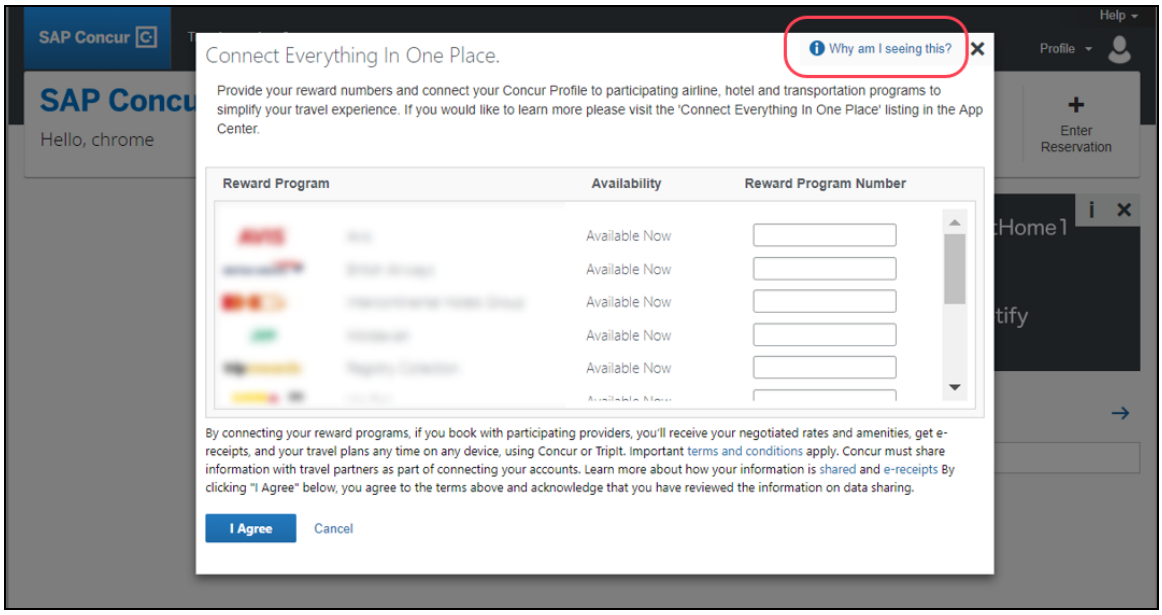
Last year, when In-Product Messaging (IPM) was introduced in Europe, the feature included the ability for users to opt out of messaging.

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

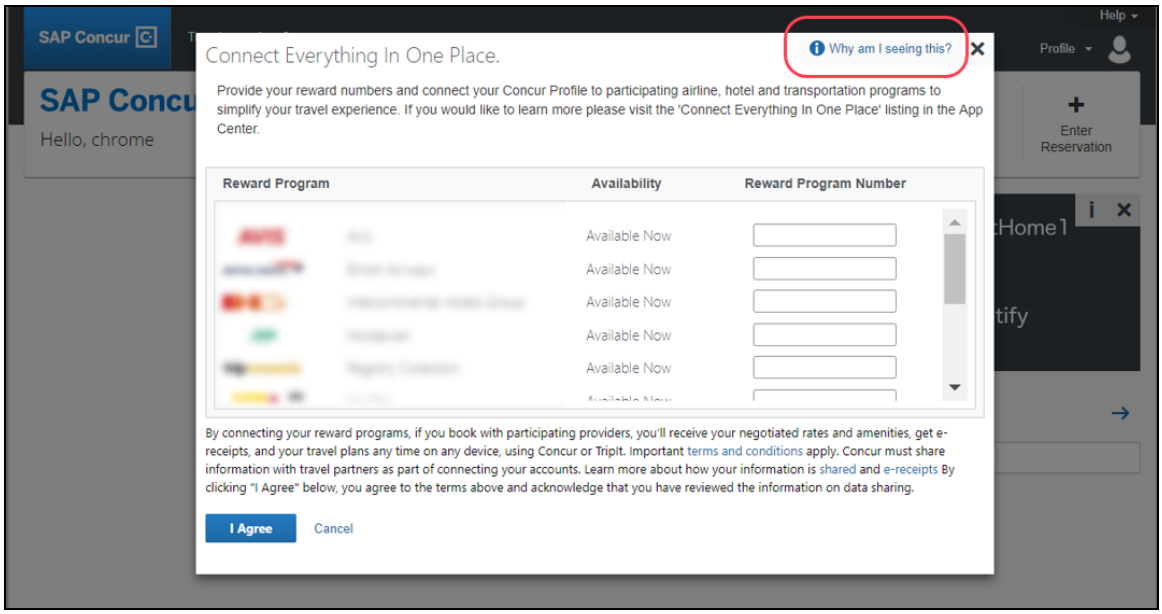
What the User Sees

MESSAGES

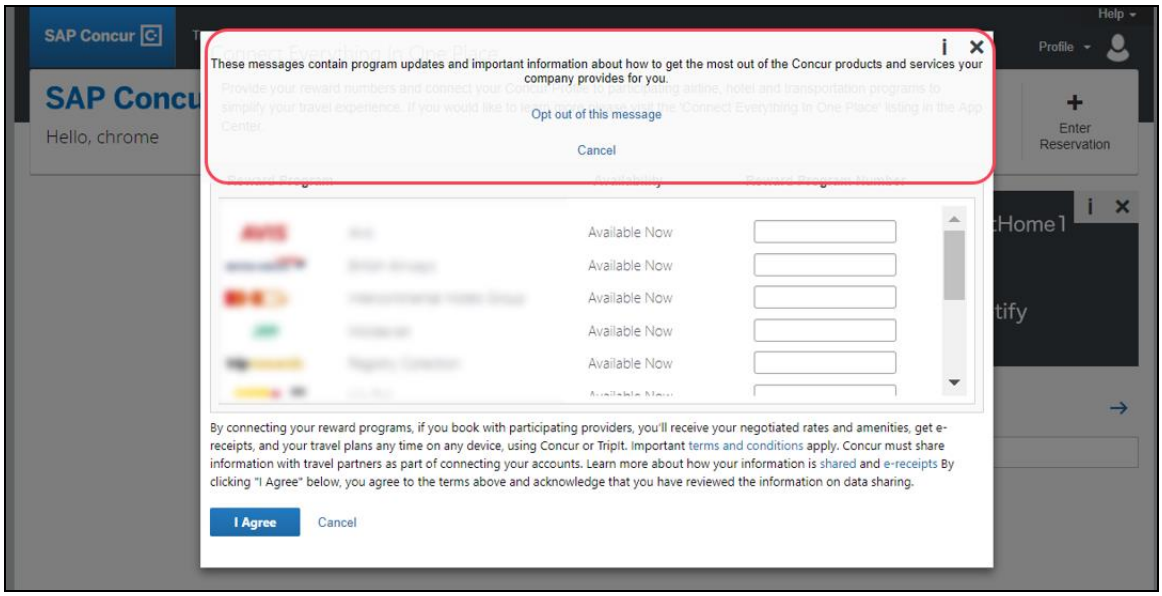
An information icon appears in the upper-right corner of the message.



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



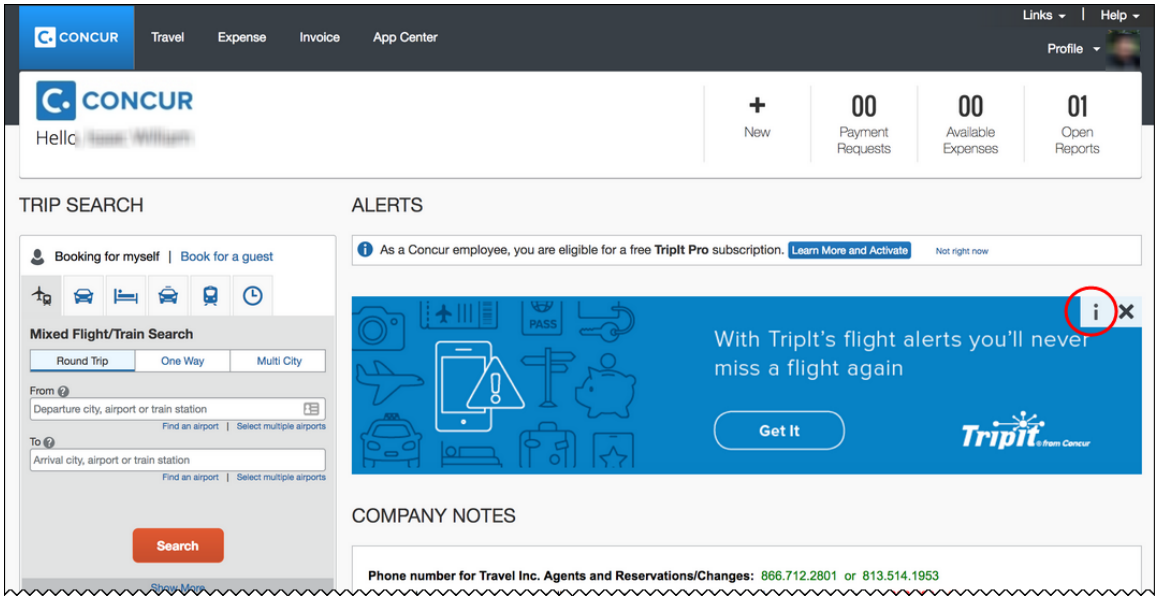
When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other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



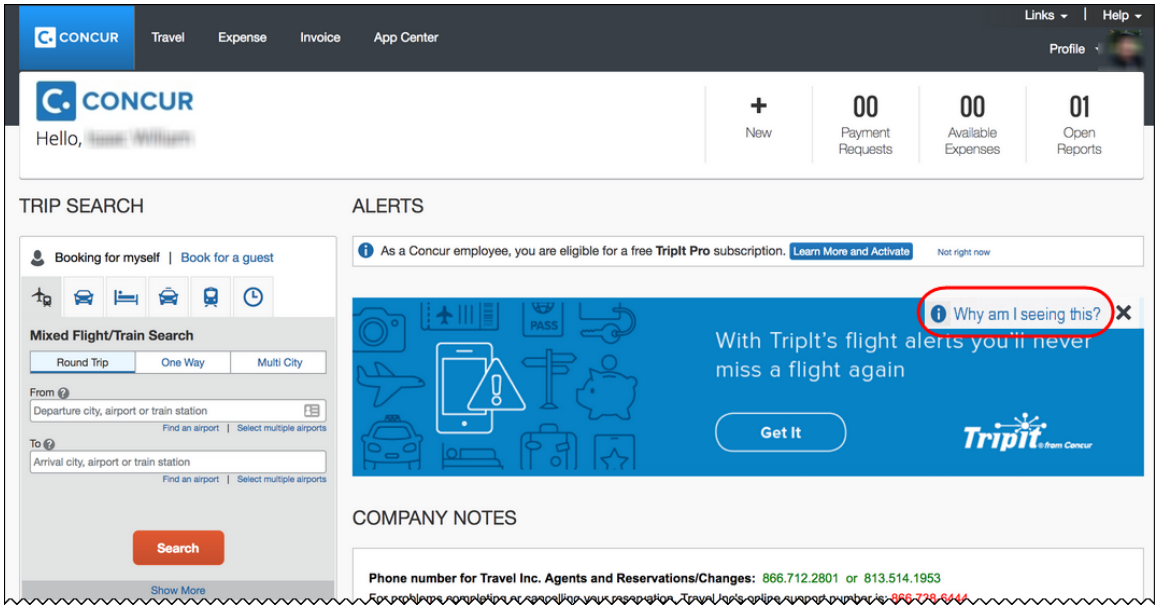
When the user clicks the close button (X in the upper-right corner), the window closes.

In-Page Messages

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



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



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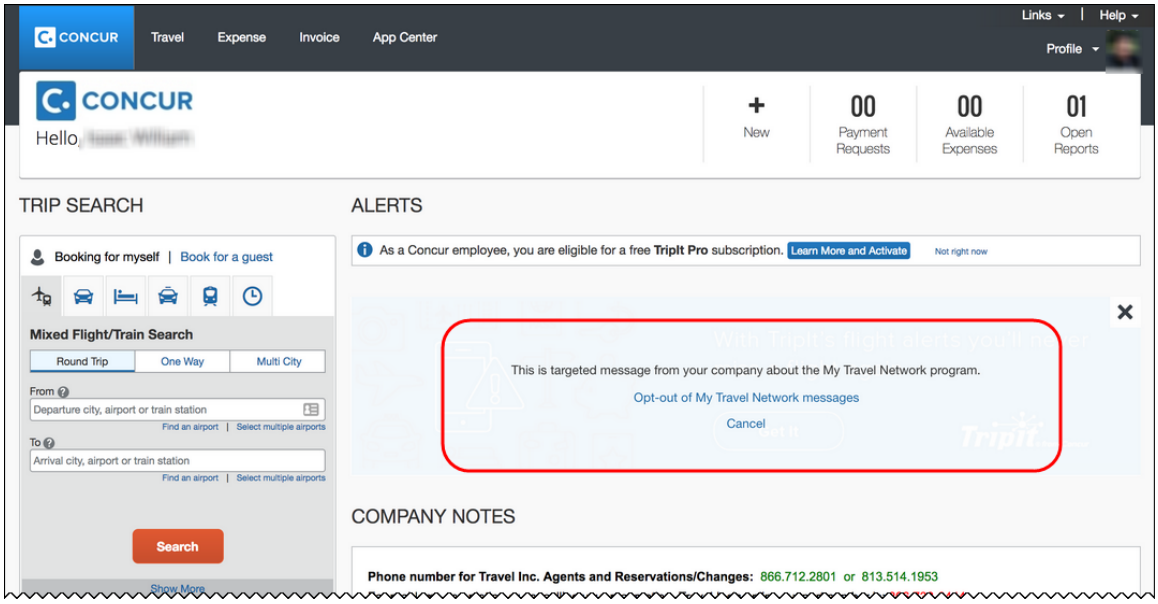


When the user clicks the close button (X in the upper-right corner), the message collapses and is removed from the page entirely.

Configuration / Feature Activation

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

Japan Public Transport (JPT)

Planned Changes IC Card Readers Will Support Company-Level Authentication

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the User Sees

Users should be aware of these three important changes.

1. During maintenance time, users will not be able to read and send IC Card transaction to Concur Expense.

2. After this change, the User Activation step will become unnecessary. This step is currently described in the *Expense: Japan Public Transport Setup Guide for Concur Standard Edition.*

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

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

Configuration/Feature Activation

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

New Filter

Planned Changes New 23-Month Filter

Overview

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

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

- Available Expenses
- View Transactions
- Unassigned Cash Advances

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

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

Plain Text File Transfer Protocol (FTP)

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

Overview

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

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

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

What This Means – The Client Experience

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

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

📖 For more information, please refer to the *File Transfer User Guide*.

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

Product Settings

Planned Changes Category List Will Display Spend Category Suggestions

Overview

The **Category** list on the **Expense Types** page (**Expense > Expense Types**) in Product Settings will show spend category suggestions at the top of the list.

BUSINESS PURPOSE/CLIENT BENEFIT

This update simplifies the spend category selection process for expense types.

What the Admin Sees

When an administrator is assigning spend categories to expense types and opens the **Category** list for an expense type, the most commonly selected spend categories will be displayed at the top of the list.

Additional information will be available in future release notes.

Configuration/Feature Activation

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

Client Notifications

Subprocessors

Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available here: Concur Non-Affiliated Subprocessors

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

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

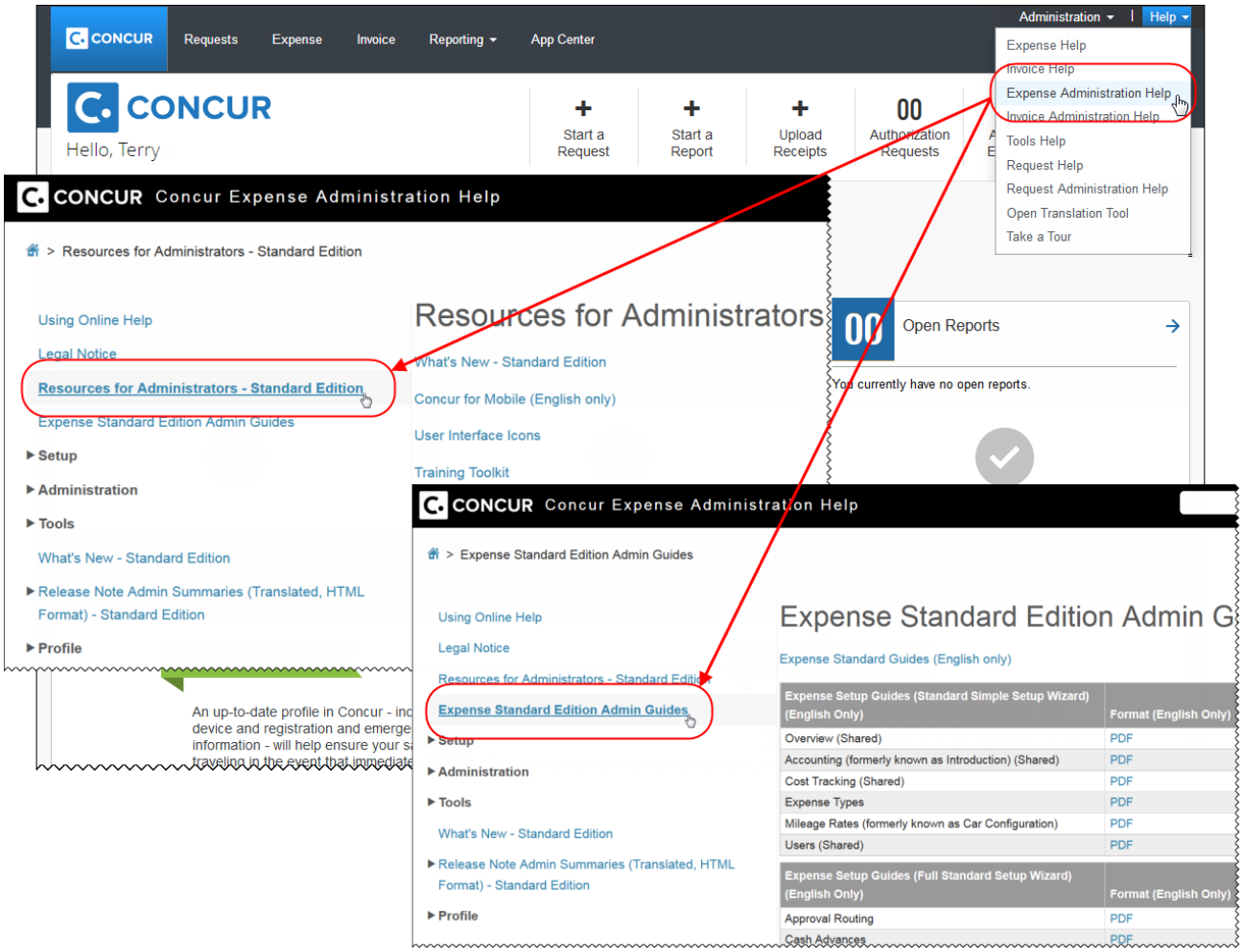
The *Concur Travel & Expense Supported Configurations – Client Version* guide is available with the setup guides, user guides, and other technical documentation.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

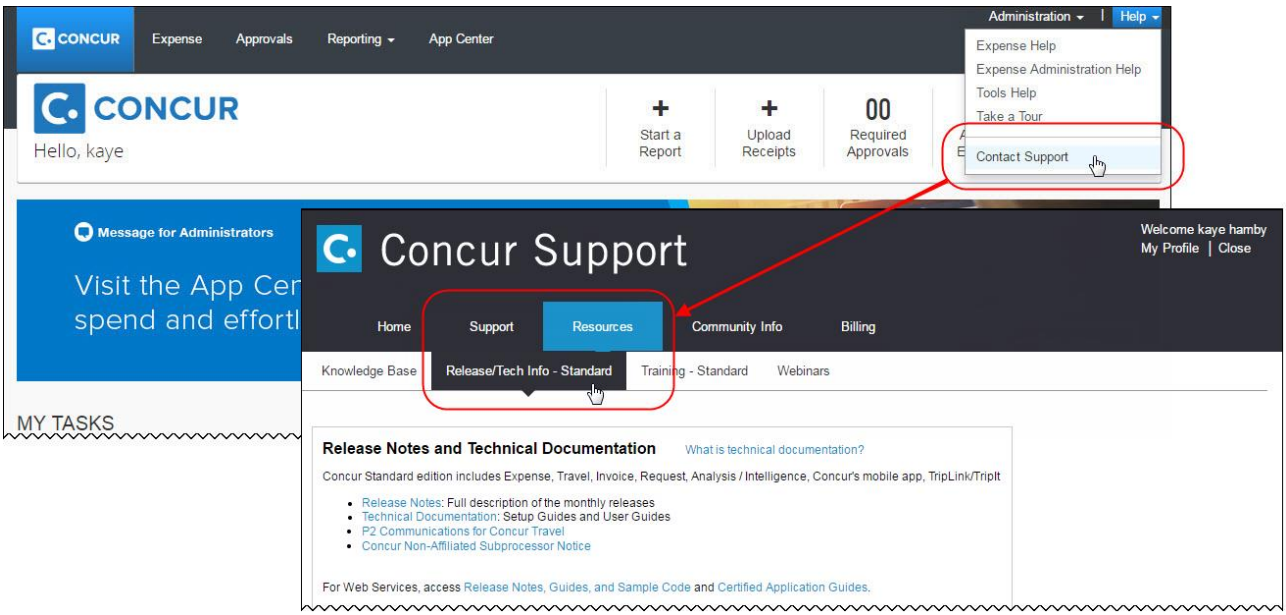
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: April 14, 2018 Initial Post: Friday, April 13, 12:00 PM PT	SAP Concur Client ***FINAL***

Contents

Legal Disclaimer

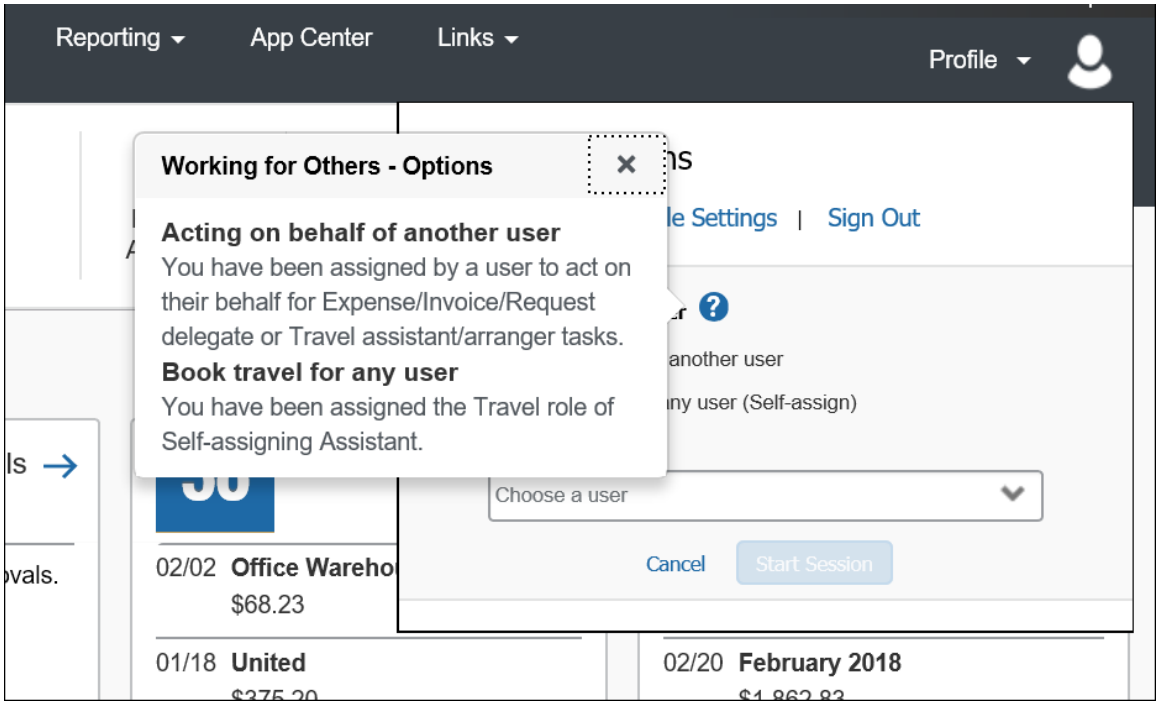
Release Notes

Accessibility

Clarification: Keyboard Access for Working for Others Quick Help

Overview

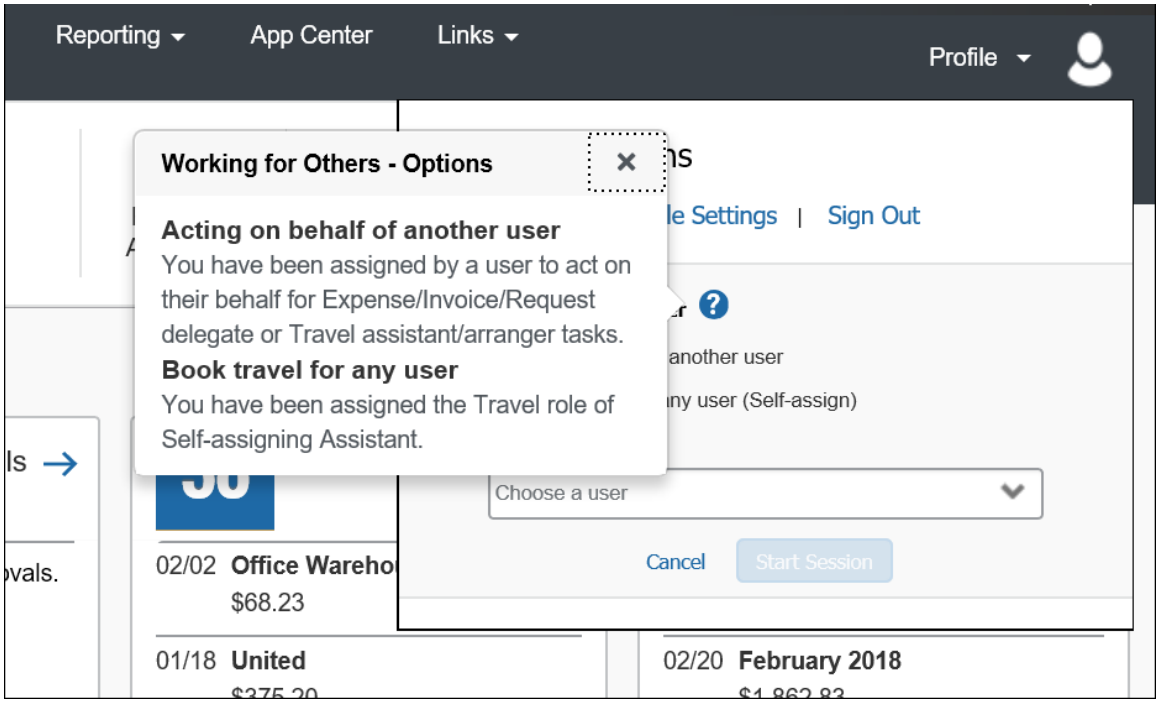
With the March release, SAP Concur announced that the **Working for Others** Quick Help became accessible via the keyboard.



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

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

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



Configuration/Feature Activation

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

Admin

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

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

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

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

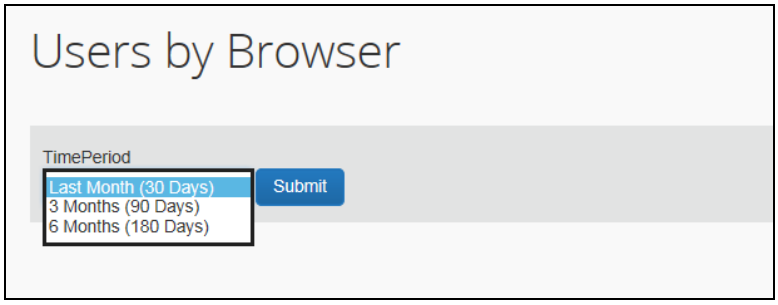
Next Steps

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

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

Overview

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



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

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

Configuration / Feature Activation

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

Budget

Budget Release Notes

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Concur's Platform

Callout Server Requirements Update

Overview

The Concur servers that support the Concur Platform Callouts are scheduled to be upgraded on Monday, April 16 at 10 am PST. These servers support the following functionality:

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

This maintenance includes the Production Proxy Migration and PWS Server Migration to VM.

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

- The endpoint is secured with SSL/TLS.

- The endpoint uses a minimum of TLS 1.0, but TLS 1.2 is preferred.
- The endpoint must employ Diffie-Hellman cipher suites with key sizes >1024 bits.
  - Due to the ever-evolving world of SSL and standards, we do not publish a specific list of permitted cipher suites, but we generally advise that a modern industry supported list is utilized.
- The endpoint must present an SSL certificate with a chain to a valid root that can be verified. If the chain cannot be verified without installing additional certificates the calls from SAP Concur will fail.

! If the callout URL does not comply with these requirements, the calls from SAP Concur will fail, beginning on April 16 2018.

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

Concur will automatically implement these changes. Clients using the Concur Platform Callouts should discuss this change with the group responsible for their callout.

Expense Pay – Global

Additional Card Programs Now Supported for CAD

Overview

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

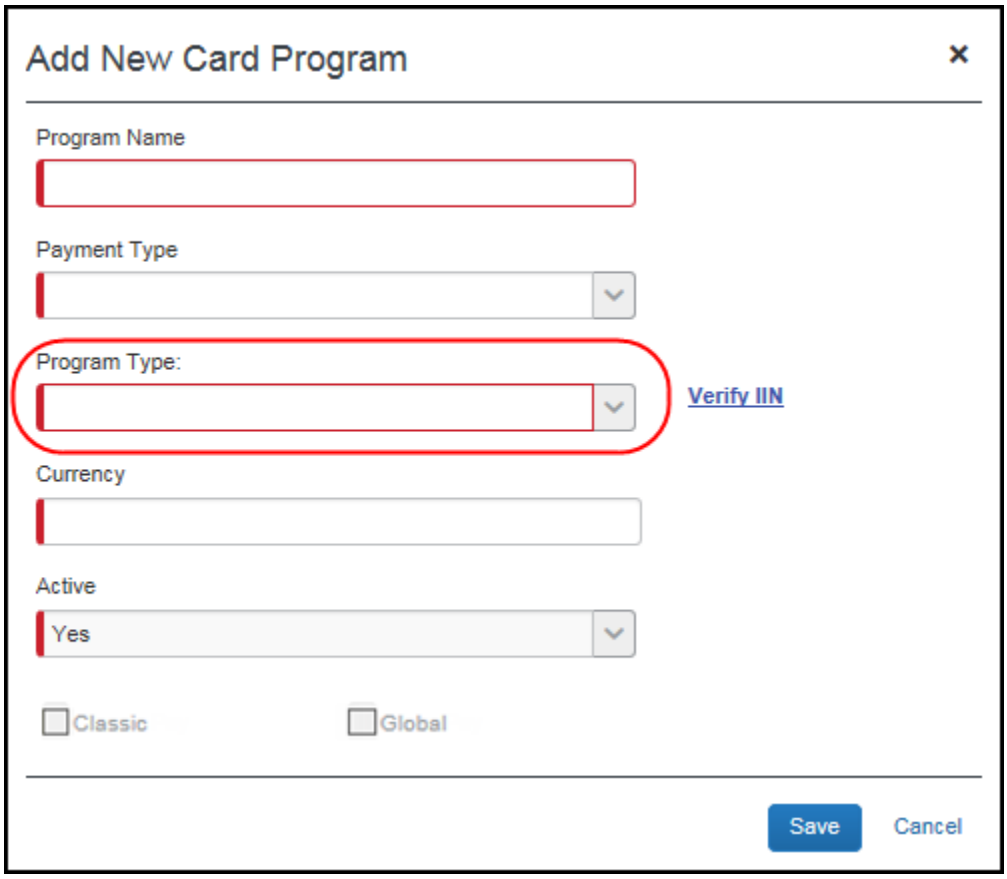
- Bank of America MasterCard CAD
- Bank of America Visa CAD

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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



Configuration/Feature Activation

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

In-Product Messaging (IMP)

Opt Out of In-Product Messaging (United States)

Overview

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

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

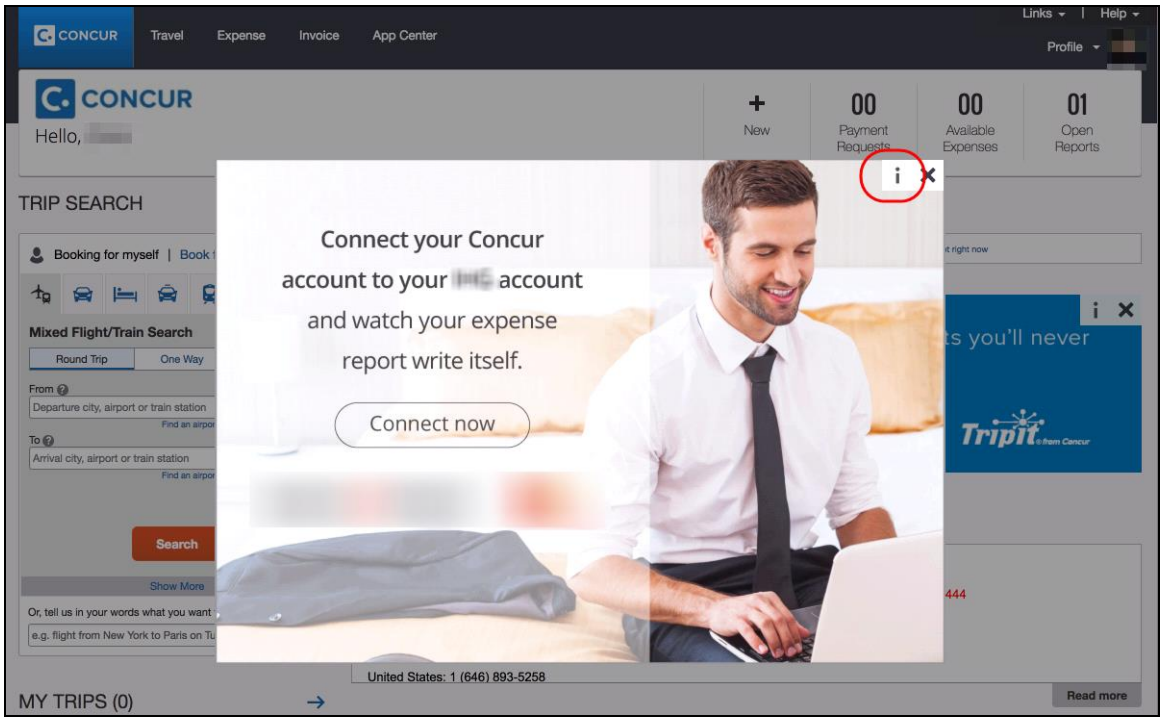
BUSINESS PURPOSE / CLIENT BENEFIT

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

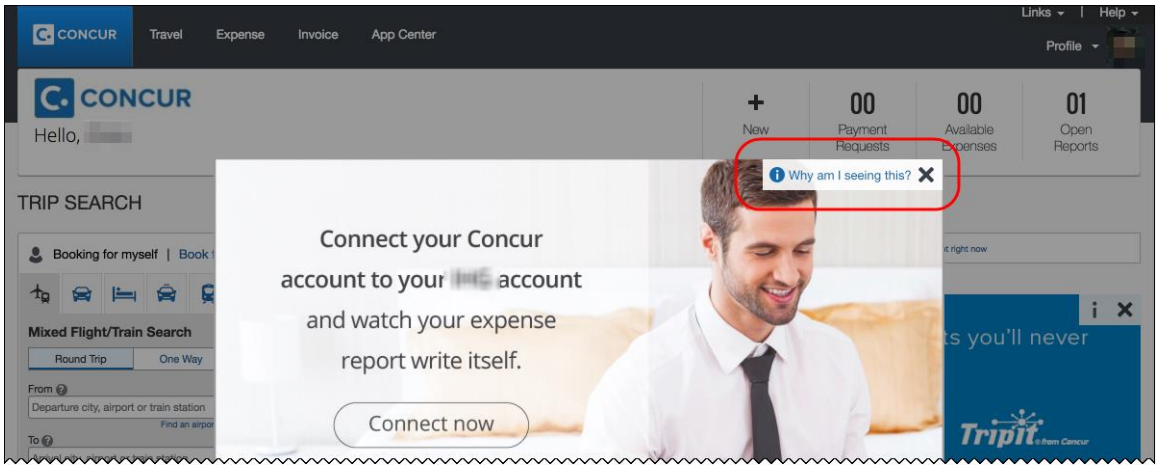
What the User Sees

MESSAGES

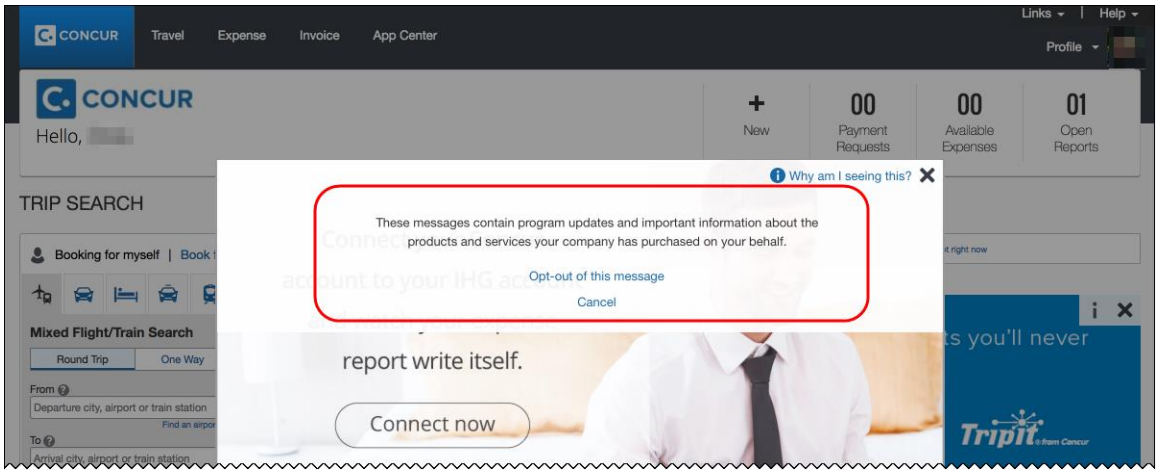
An information icon appears in the upper-right corner of the message.



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



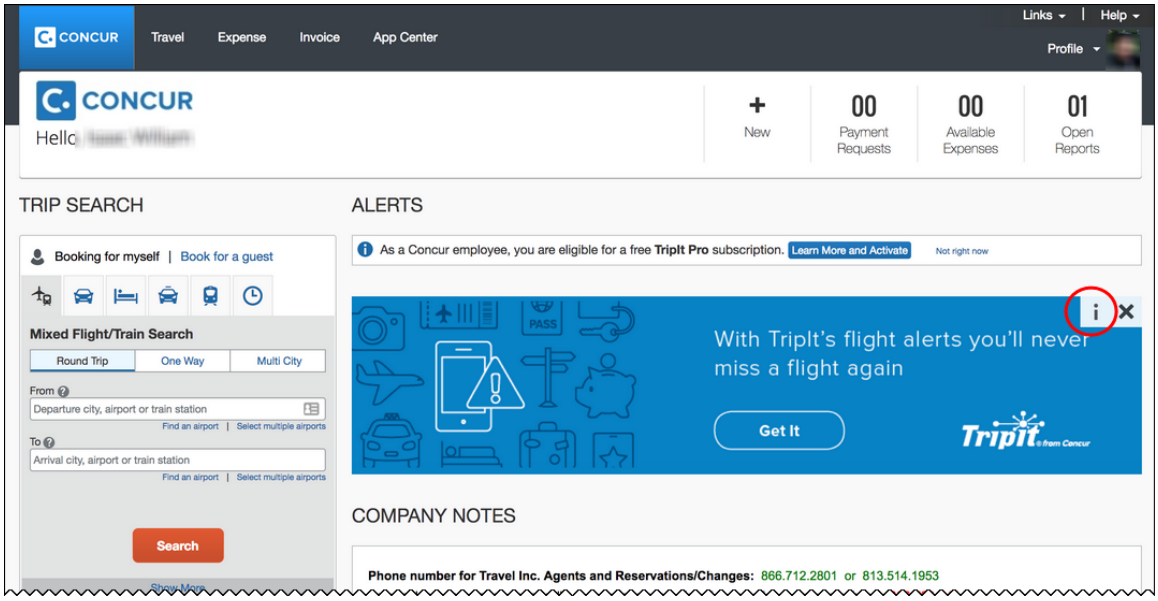
When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other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



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

In-Page Messages

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



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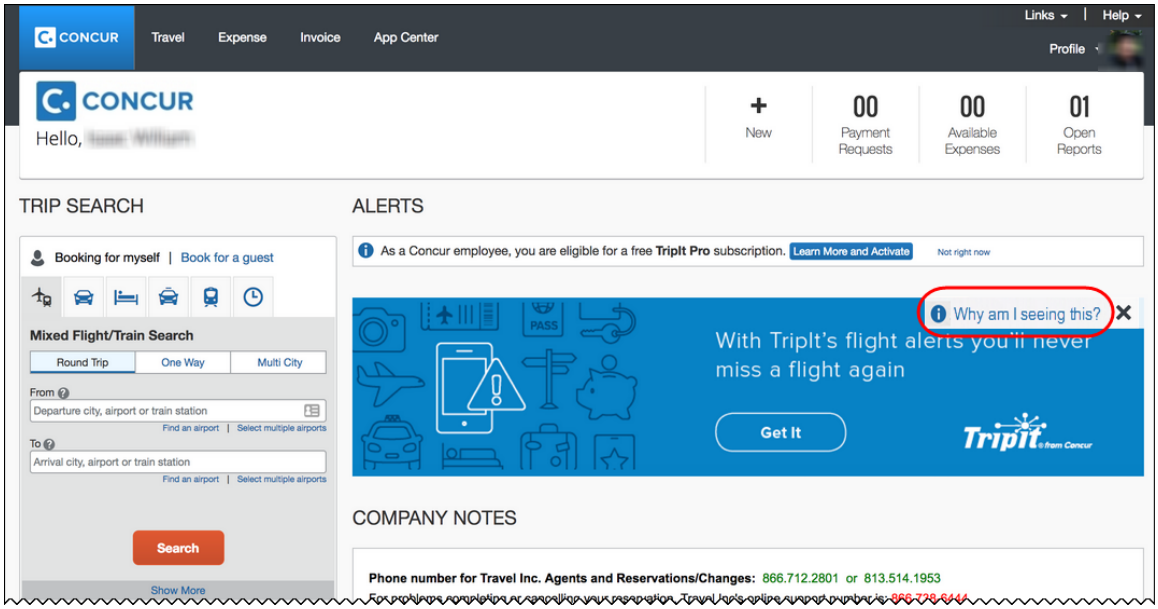
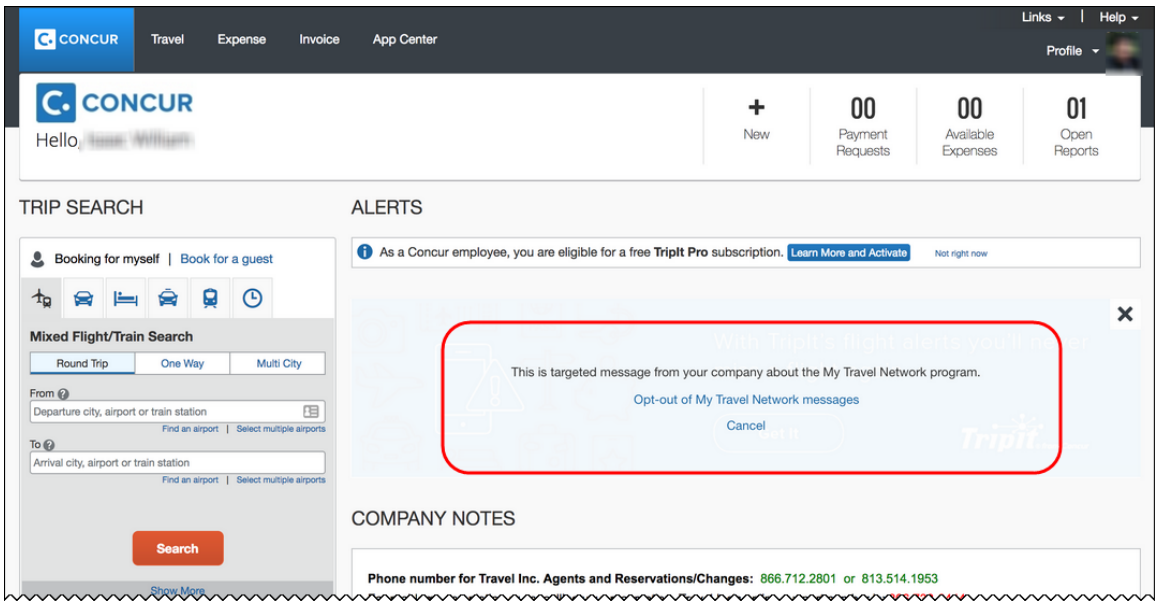


When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this message as well as a link for the user to click to opt out of seeing similar messages in the future. The user could still be shown IPM relating to other categories.



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

Configuration / Feature Activation

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

Japan Public Transport (JPT)

IC Card Readers Will Support Company-Level Authentication

Overview

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

The scheduled maintenance times are as follows:

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the User Sees

Users should be aware of these three important changes.

1. During maintenance time, users will not be able to read and send IC Card transaction to Concur Expense.

2. After this change, the User Activation step will become unnecessary. This step is currently described in the *Expense: Japan Public Transportation Setup Guide for Concur Standard Edition.*

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

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

Configuration/Feature Activation

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

Jorudan Maintenance

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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

What the User Sees

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

Configuration/Feature Activation

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

Next Generation (NextGen)

Expense User Interface

New User Interface for Concur Expense End Users

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

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

The result is the next generation of the Expense user interface designed to provide a modern, consistent, and streamlined user experience. This technology not only

provides an enhanced UI, but also allows SAP Concur to react more quickly to customer requests to meet changing needs as they happen.

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

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

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

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

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

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

Product Settings

Category List Now Displays Spend Category Suggestions (English and Japanese only)

Overview

For clients viewing Expense in English or Japanese, the **Category** list on the **Expense - Expense Types** page (**Expense Types for Expenses > Expense Types**) in Product Settings now displays spend category suggestions at the top of the list.

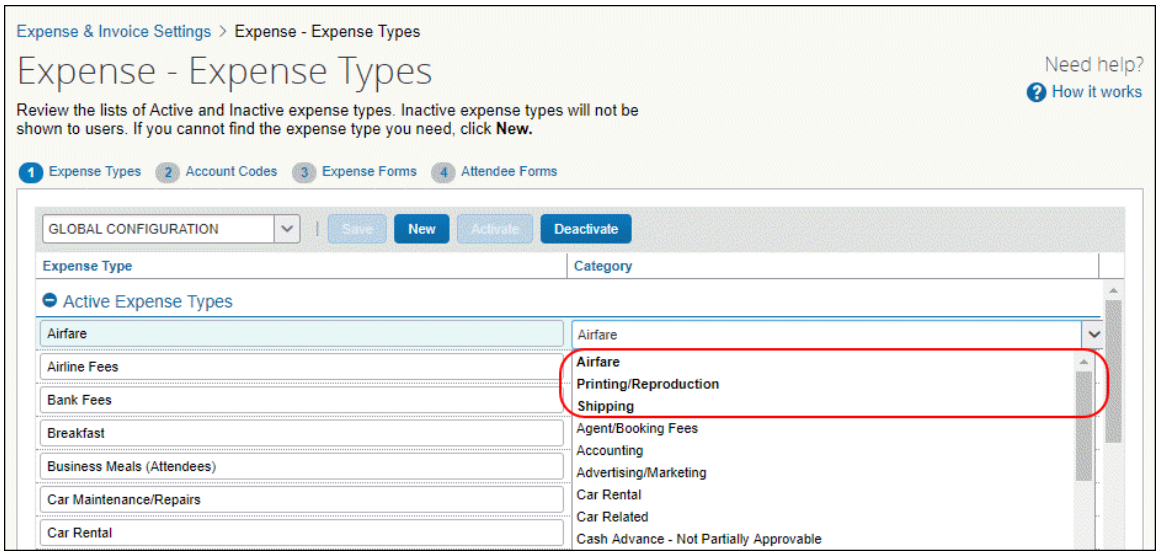
NOTE: For all other languages, the **Category** list on the **Expense - Expense Types** page will continue to display the spend categories in alphabetical order.

BUSINESS PURPOSE/CLIENT BENEFIT

This update simplifies the spend category selection process for expense types.

What the Admin Sees

When an administrator is assigning spend categories to expense types and opens the **Category** list for an expense type, the most commonly selected spend categories are displayed at the top of the list and are bolded. The remaining spend categories are listed in alphabetical order.



Configuration/Feature Activation

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

For more information, refer to the *Expense: Expense Types Setup Guide for Concur Standard Edition*.

New Configurable Expense Approval Timeout Duration

Overview

Administrators can now adjust the numbers of days that an expense report sits in an approvers queue before it is rerouted to the approvers manager.

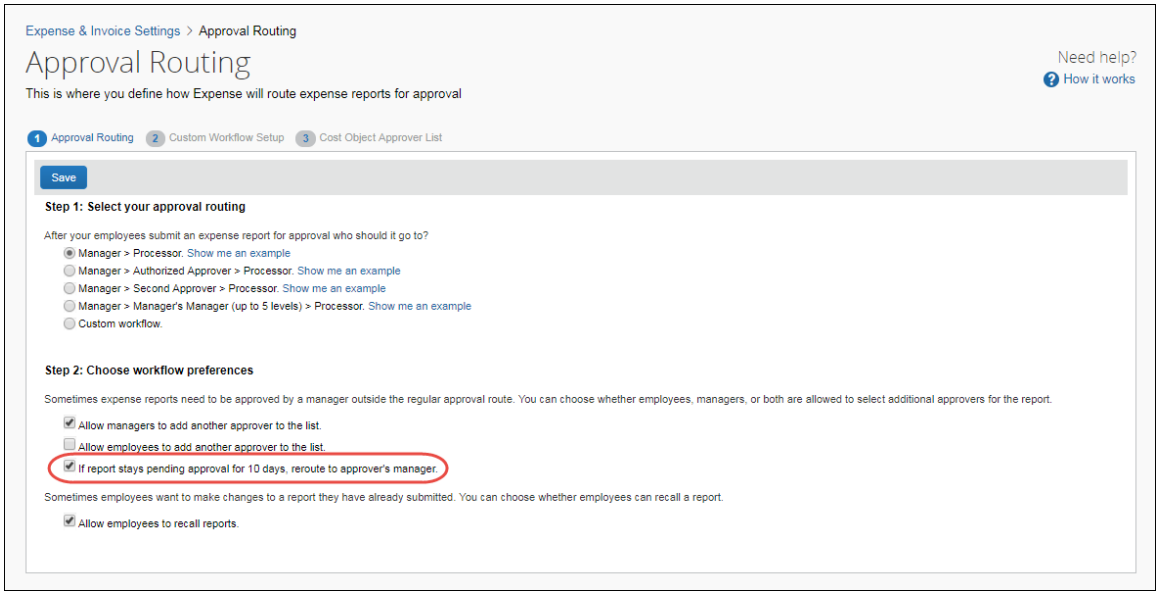
BUSINESS PURPOSE/CLIENT BENEFIT

This change allows greater control over the expense approval process.

What the Admin Sees

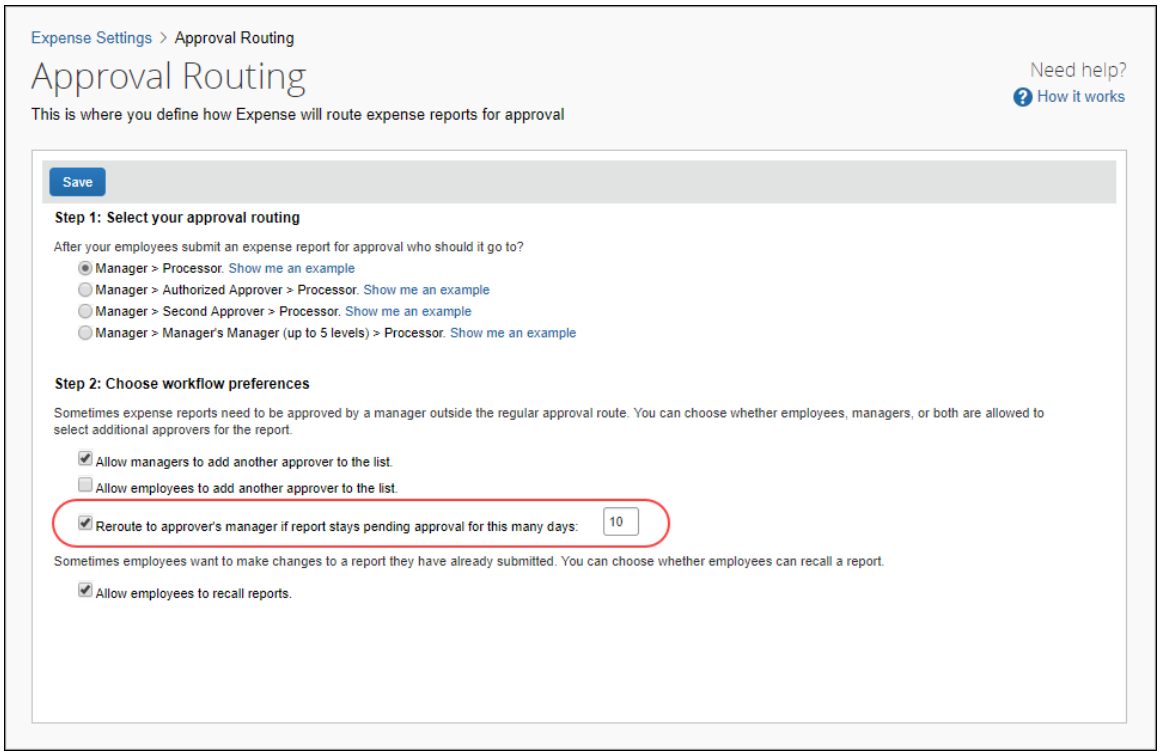
BEFORE

The system automatically rerouted an expense report to the approver's manager after pending approval for more than 10 days when the **If report stays pending approval for 10 days, reroute to approver's manager** checkbox was selected.



AFTER

On the **Approval Routing** page, the **If report stays pending approval for 10 days, reroute to approver's manager** checkbox is now renamed as the **Reroute to approver's manager if report stays pending approval for this many days** checkbox. When this checkbox is selected an integer field appears with the default number of days set to 10. This number can be modified.



If an expense report is pending approval for the set number of days, the report is automatically rerouted to approver's manager.

Configuration/Feature Activation

The **Approval Routing** page automatically displays the new field; there are no additional configuration or activation steps.

For more information, refer to the *Expense: Approval Routing Setup Guide* for Concur Standard Edition.

Taxation

(Canada) Update for Prince Edward Island Province (PEI) RITC Phase Out

Overview

From April 1, 2018, the RITC (Recaptured Input Tax Credits) recapture rate on restricted expenses will be at the rate of 75% for the Canadian province of Prince Edward Island. The RITC recapture rate will phase out over the next three years.

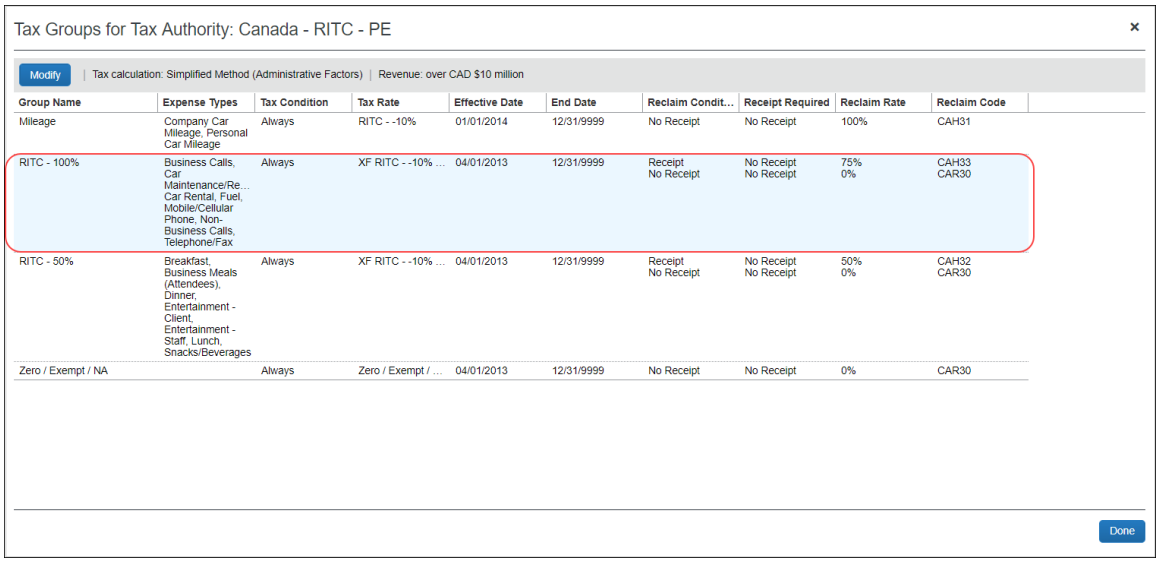
Prince Edward Island HIT Recapture Periods	P.E.I. RITC Recapture Rate
April 1, 2018 to March 31, 2019	75%
April 1, 2019 to March 31, 2020	50%
April 1, 2020 to March 31, 2021	25%
April 1, 2021 and beyond	0%

BUSINESS PURPOSE/CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

From April 1, new rates display by clicking **Administration > Expense Settings > VAT** (tile) **> Taxation – VAT Tracking >** click **View** (Tax Groups for Tax Authority: Canada – RITC).



Group Name	Expense Types	Tax Condition	Tax Rate	Effective Date	End Date	Reclaim Condit...	Receipt Required	Reclaim Rate	Reclaim Code
Mileage	Company Car Mileage, Personal Car Mileage	Always	RITC - -10%	01/01/2014	12/31/9999	No Receipt	No Receipt	100%	CAH31
RITC - 100%	Business Calls, Car Maintenance/Re... Car Rental, Fuel, Mobile/Cellular Phone, Non-Business Calls, Telephone/Fax	Always	XF RITC - -10% ...	04/01/2013	12/31/9999	Receipt No Receipt	No Receipt No Receipt	75% 0%	CAH33 CAR30
RITC - 50%	Breakfast, Business Meals (Attendees), Dinner, Entertainment - Client, Entertainment - Staff, Lunch, Snacks/Beverages	Always	XF RITC - -10% ...	04/01/2013	12/31/9999	Receipt No Receipt	No Receipt No Receipt	50% 0%	CAH32 CAR30
Zero / Exempt / NA		Always	Zero / Exempt / ...	04/01/2013	12/31/9999	No Receipt	No Receipt	0%	CAR30

Configuration/Feature Activation

The **Taxation** page automatically displays the new rates; there are no additional 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.

Admin

Planned Changes Expense Assistant Can Create Trip-Based Expense Reports

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

Planned Changes Removing the "Privacy Agreement" Page

Overview

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

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

FAQs

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

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

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

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

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

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

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

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

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

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

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

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

Q. Who can I contact for more information?

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

Configuration / Feature Activation

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

Company Card

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

Overview

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

Data Retention

Planned Changes New Feature for Outdated Data

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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

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

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

Configuration/Feature Activation

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

New Filter

Planned Changes New 23-Month Filter

Overview

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

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

- Available Expenses
- View Transactions
- Unassigned Cash Advances

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

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

Plain Text File Transfer Protocol (FTP)

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

Overview

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

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

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

What This Means – The Client Experience

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

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

📖 For more information, please refer to the *File Transfer User Guide*.

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

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

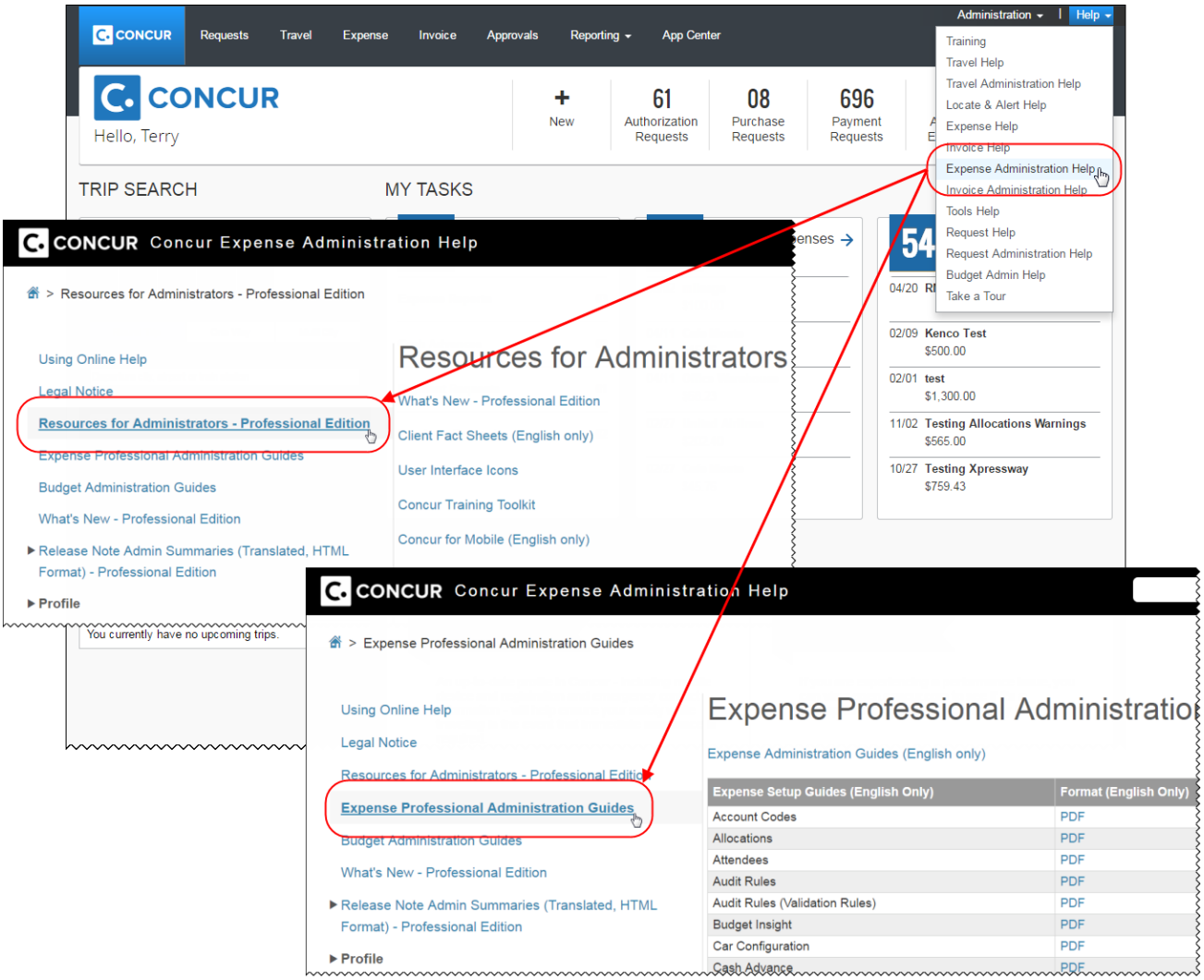
The list of non-affiliated subprocessors is available here: SAP Concur Non-Affiliated Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

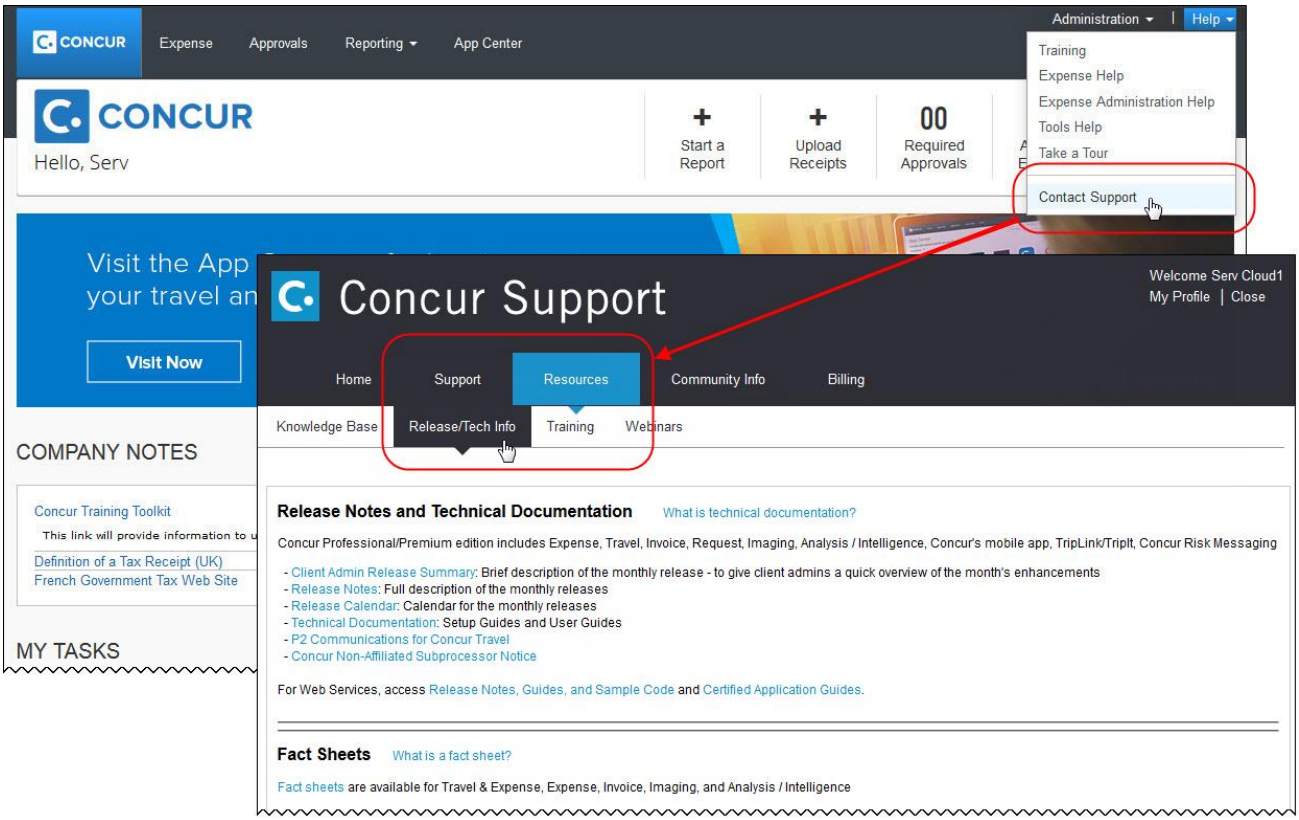
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: May 12, 2018 Update #4: Thursday, May 24, 4:00 PM PT	SAP Concur Client ***FINAL***

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New Cookie Preferences Link in the SAP Concur Footer

Overview

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

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

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

IMPORTANT

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

- TrustArc, a global privacy and data governance provider, monitors and manages the cookie-related processes for SAP Concur.

  Several consent options are described on the following pages.

  - Be aware the TrustArc provides all consent text and manages all translations of the consent text. Neither SAP Concur nor its customers can affect the text or translation in any way.
  - As described on the following pages, consent regulations differ by country. TrustArc determines the consent option that is appropriate for each user, based on each country's regulations. SAP Concur cannot affect that determination in any way nor does SAP Concur have a list of countries and their consent regulations.
  - Be aware that the "country" is defined as the one in which the user is physically located when they sign in to SAP Concur – ***not*** the user's home country as defined in their profile nor the user's company's location.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. ***There is no option for companies to make these choices for their users.***
- Once a user has actively accepted cookies, they cannot modify their cookies options to stop accepting cookies except to remove all cookies and start over.

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the User Sees

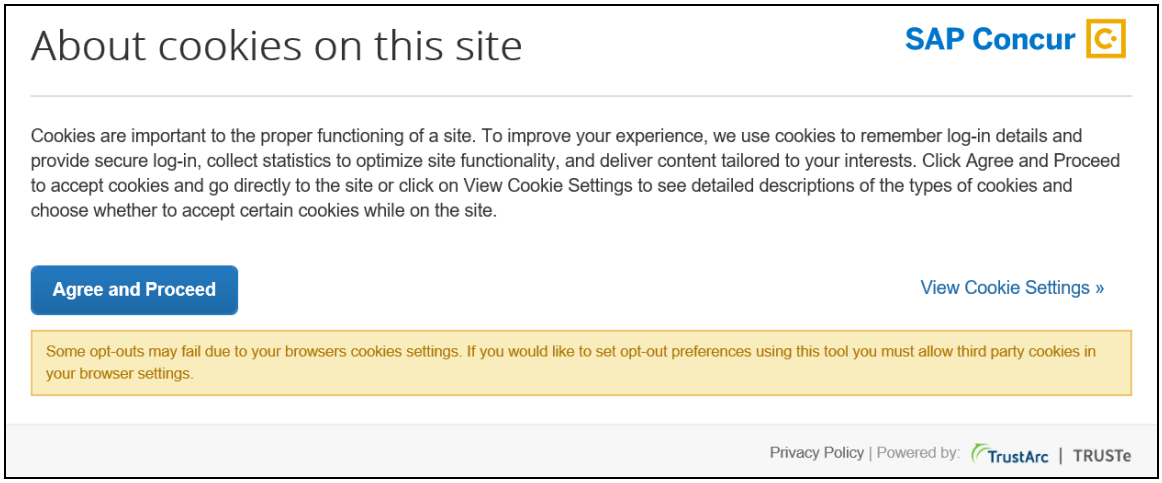
What the user sees depends on the country in which the user is physically located when they sign in to SAP Concur. Each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of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

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

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

ACTIVE CONSENT REQUIRED

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

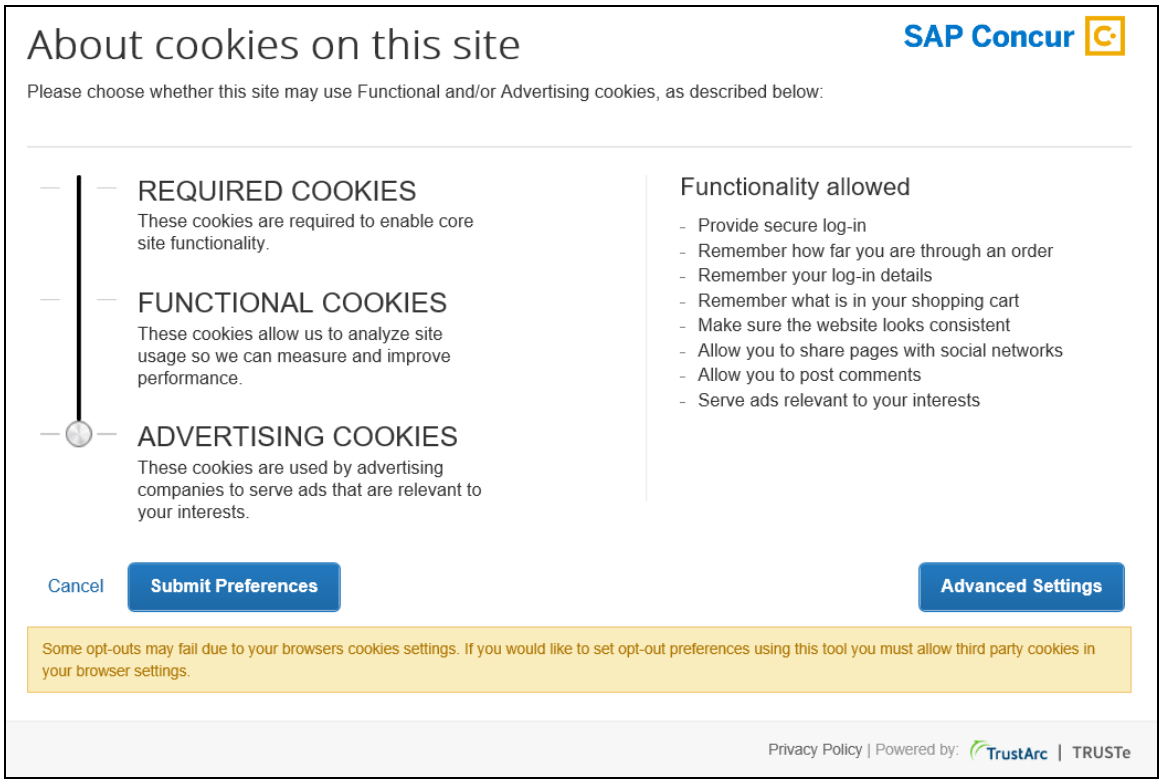


The user can:

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

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

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



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

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

The user can:

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

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

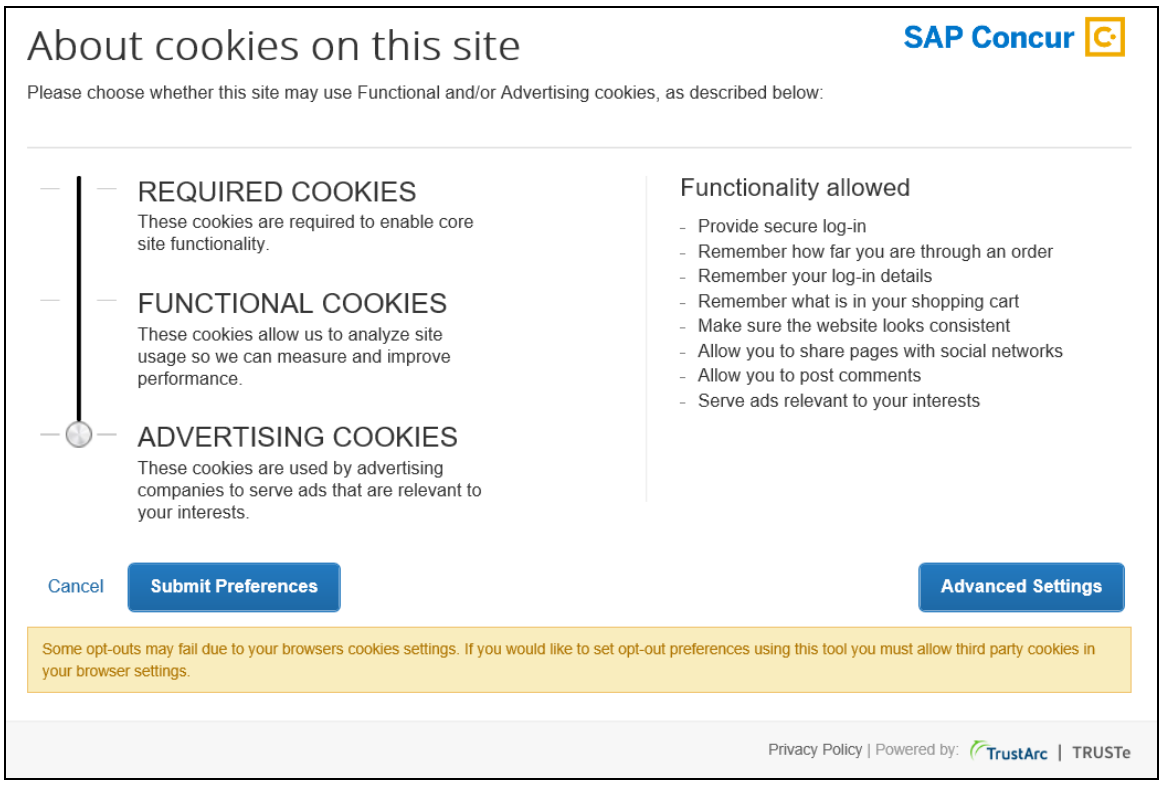
Once the user consents, the requirement is satisfied and the consent message does not appear again.

PASSIVE CONSENT

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

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

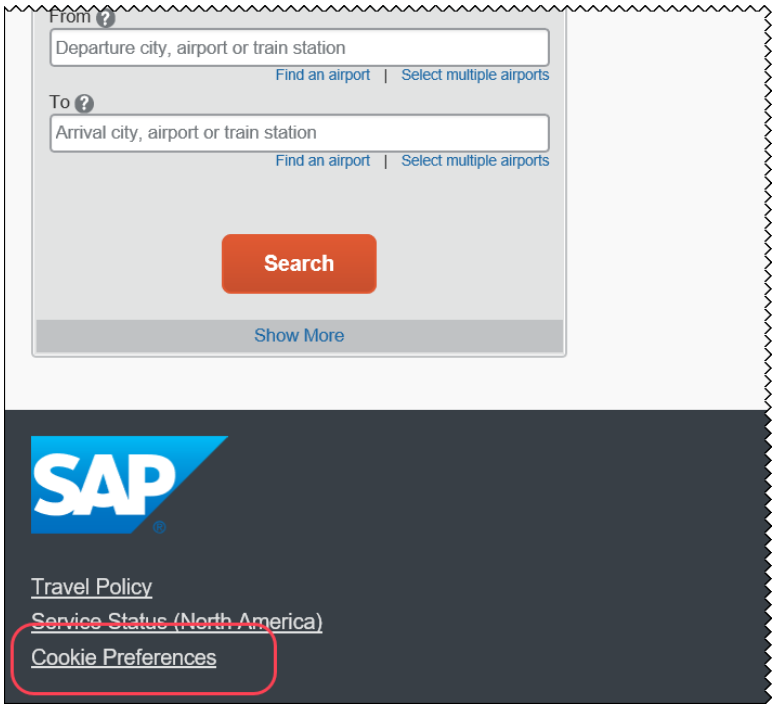
The user clicks **Want to know more?**, the user sees the cookie options (as described previously).



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

MAKING CHANGES

The **Cookie Preferences** link appears in the SAP Concur footer.



This link allows users to view their existing cookie settings. To modify existing cookie preferences, TrustArc requires that the user clear all existing cookies and then choose a new setting.

! **IMPORTANT:** Not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Cookie Preferences** link there.

Configuration / Feature Activation

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

Whitelist for TrustArc.com

Overview

As noted in the *New Cookie Preferences Link in the SAP Concur Footer* release note, cookie-related process changes were introduced because of specific consent regulations in Europe.

To ensure that SAP Concur properly responds to the regulations, SAP Concur has enlisted the assistance of TrustArc, a global privacy and data governance provider.

Please ensure that your organization's IT (or similar) department adds TrustArc.com to its whitelist, so TrustArc can properly monitor and manage these processes.

BUSINESS PURPOSE / CLIENT BENEFIT

Whitelisting ensures that TrustArc has the proper access to manage consent requirements on behalf of SAP Concur.

Configuration / Feature Activation

There are no configuration steps except to ensure that TrustArc.com is whitelisted for your organization.

UPDATE Processor Privacy Statement Link – Targeted for May 25

Overview

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

Targeted for May 25, the **Processor Privacy Statement** link will be available in the SAP Concur footer.

! **IMPORTANT:** Not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Processor Privacy Statement** link there.

Configuration / Feature Activation

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

Privacy Agreement Page Removed; New SAP Concur Privacy Statement

Overview

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the User Sees

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

"PROCESSOR" OF CUSTOMER DATA

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

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

PRIVACY STATEMENT TEXT

The new SAP Concur Privacy Statement text is available here:

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

FAQs

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

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

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

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

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

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

Configuration / Feature Activation

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

SAP Concur Updating to sap.com Email Addresses

Overview

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

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

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

and all other existing concur.com email addresses.

BACKGROUND

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration / Feature Activation

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

Budget

Budget Release Notes

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

Standalone release notes provide greater visibility for Concur Budget.

Company Cards

Addition of Income and Transfer Transaction Categories to Yodlee

Overview

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration / Feature Activation

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

Data Retention

New Early Access Feature for Outdated Data

Overview

SAP Concur has a new feature, Data Retention, that allows clients to control how long the Concur solution stores their data based on who, when, and where criteria.

The feature provides the following functionality:

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

For Expense, Request, and Invoice, in Standard Edition, the existing admin roles have been granted the permission to administer (set up and edit) the Data Retention configuration. For Travel, in Standard Edition, a new role, Data Retention Administrator, was created.

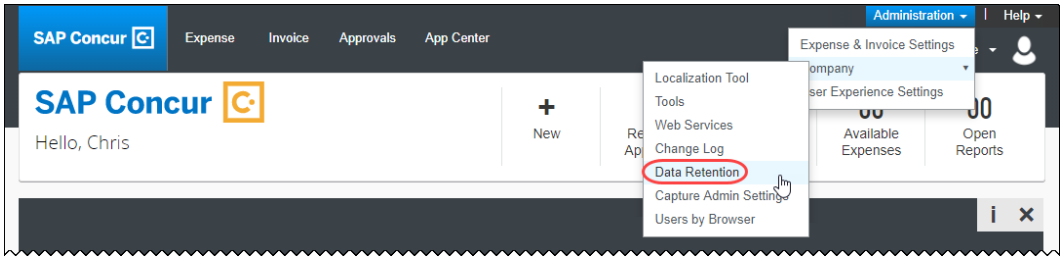
Concur Service	Role	Description
Expense (includes Request)	Can Administer (existing role)	Can **view** and **access** the **Data Retention** link on the **Tools** page and will **receive** a 72-hour confirmation email of their configuration changes.
Invoice	Is Invoice Admin (existing role)	Can **view** and **access** the **Data Retention** link on the **Tools** page and will **receive** a 72-hour confirmation email of their configuration changes.
Travel	Data Retention Administrator (new role)	Can **view** and **access** the **Data Retention** link on the **Tools** page and will **receive** a 72-hour confirmation email of their configuration changes.

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Admin Sees

If enabled by Concur, on the **Company** list, the client admin will see a **Data Retention** link.



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

Configuration / Feature Activation

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

New 23-Month Filter

Overview

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

- Available Expenses
- View transactions
- Unassigned Cash Advances

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

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration / Feature Activation

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

Expense Pay – Global

(Canada) Additional Card Programs Now Supported for CAD

Overview

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

- Citibank MasterCard CAD
- Citibank Visa CAD

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Admin Sees

These additional card programs are available to admins on the **Administration > Expense Settings > Connections > Credit Cards > New** page.

Configuration / Feature Activation

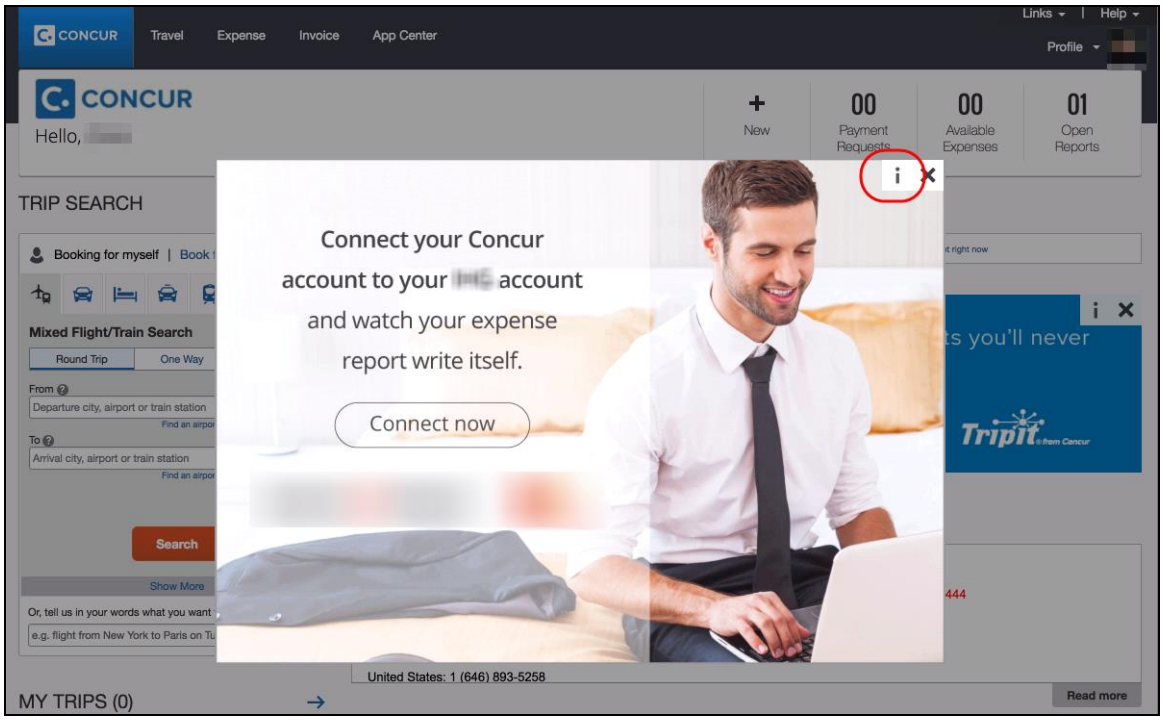
Concur automatically implemented these changes; there are no configuration or activation steps.

In-Product Messaging (IPM)

Clarification: Opt Out of In-Product Messaging

Overview

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



Just to clarify:

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

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

Configuration / Feature Activation

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

Japan Public Transportation (JPT)

IC Card Numbers Removed from Receipt Images

Overview

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

This change increases personal privacy for Concur users.

Configuration / Feature Activation

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

Jorudan Maintenance

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Admin Sees

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

What the User Sees

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

Configuration / Feature Activation

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

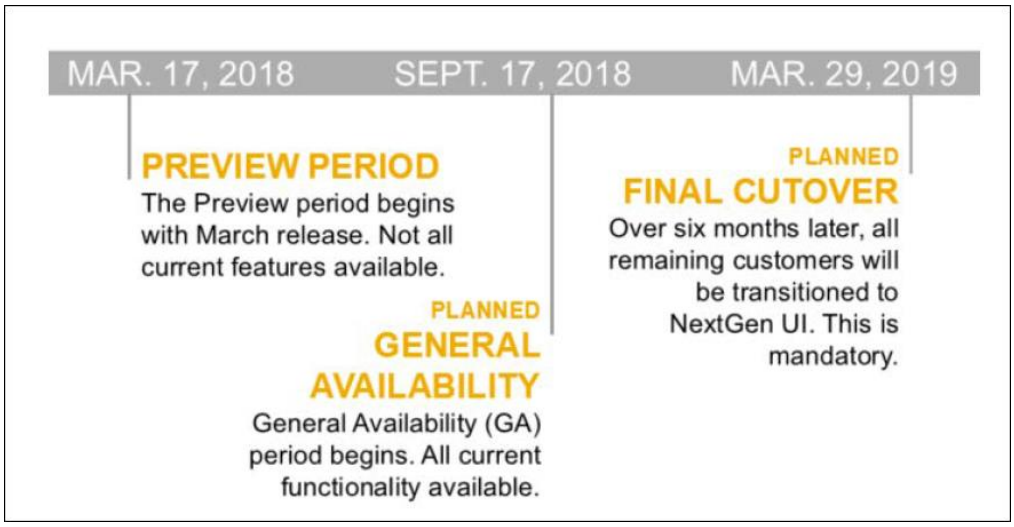
Next Generation (NextGen) Expense

Ongoing New User Interface for Concur Expense End Users

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

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

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



BUSINESS PURPOSE / CLIENT BENEFIT

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

QuickBooks

QuickBooks Connector: Ending Support for QuickBooks 2015

Overview

Per Intuit, after May 31, 2018, access to add-on services will be discontinued for QuickBooks Desktop 2015 (Windows and Mac). This includes all versions of QuickBooks Desktop 2015 (Pro, Premier, Enterprise Solutions, Accountant Edition, and Mac). The Concur QuickBooks Connector will still work with QuickBooks 2015, however Concur Support will no longer provide support for QuickBooks 2015 after May 31, 2018 to maintain alignment with Intuit's QuickBooks support policy.

Concur Support will provide support for the following version of QuickBooks:

- QuickBooks 2016
- QuickBooks 2017
- QuickBooks 2018

The currently supported versions of the QuickBooks Web Connector are:

- 2.2.0.71
- 2.2.0.80

BUSINESS PURPOSE / CLIENT BENEFIT

This update aligns the Concur Support policy with the Intuit Support policy for QuickBooks versions.

Configuration / Feature Activation

There are no configuration or activation steps. Contact Intuit with any questions regarding the support policy of QuickBooks Desktop 2015.

Planned Changes

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

Admin

Planned Changes Expense Assistant Can Create Trip-based Expenses Reports

Overview

Admins can now pre-configure Expense Assistant options.

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

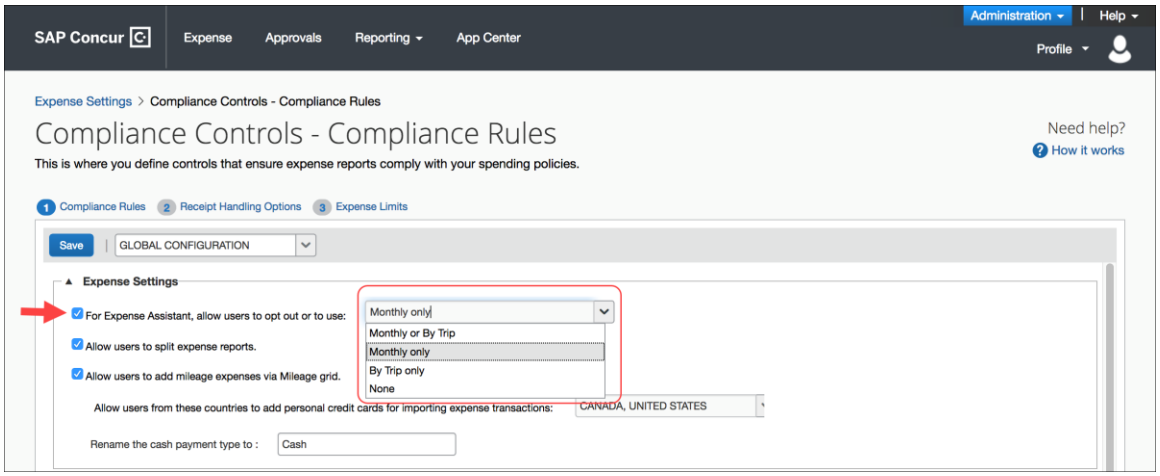
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Expense Settings > Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use** field's list will show the new choices.

With this field, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users, and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration remains unchanged.

For new clients, by default, **For Expense Assistant, allow users to opt out or to use** is enabled and *Monthly or By Trip* is selected from the list.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Expense Settings > Compliance Controls – Compliance Rules** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list.

Until the trip-based expense report functionality for Expense Assistant is completed in a future release, Expense Assistant will continue creating calendar-based expense reports for the users if you select the *Monthly or By Trip* or *Monthly* only options in the **For Expense Assistant, allow users to opt out or to use** field.

If you select the *By Trip only* or *None* options, Expense Assistant will be disabled for all your users and they will not see any Expense Assistant functionality.

📖 For more information about Expense Assistant, refer to the *FAQ - Expense Assistant* available from the fact sheet landing page.

Plain Text File Transfer Protocol (FTP)

Planned Changes Support for Plain Text FTP to End on September 1st, 2018

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

! **IMPORTANT:** SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

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

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

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

📖 For more information, please refer to the Client FAQ and the *File Transfer User Guide*.

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

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

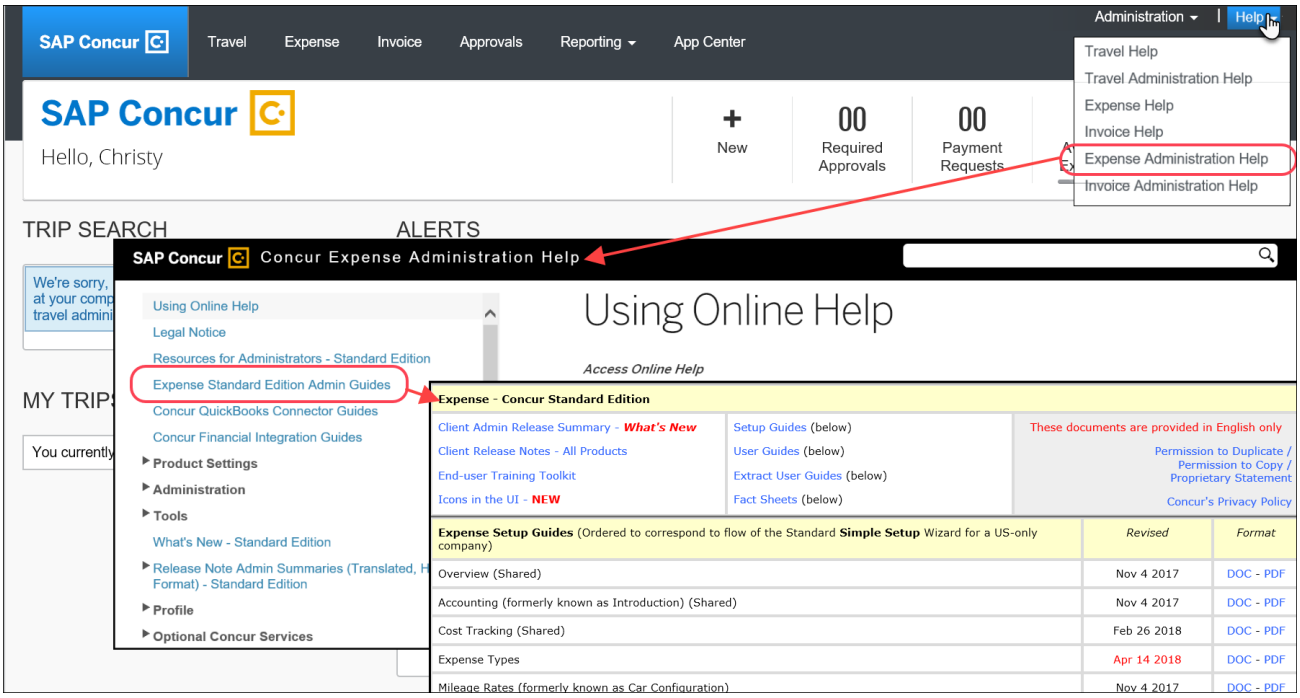
The list of non-affiliated subprocessors is available here: SAP Concur Non-Affiliated Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

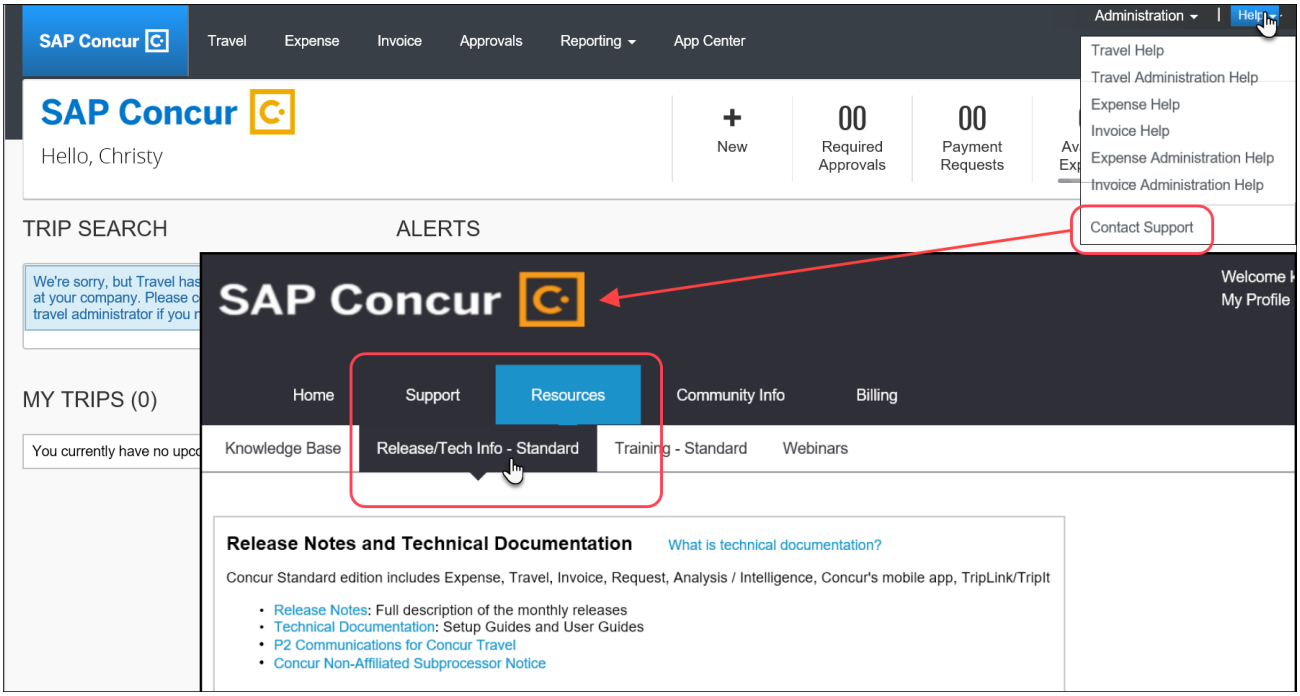
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: June 16, 2018 Update #1: Monday, June 25, 1:30 PM PT	SAP Concur Client ***FINAL***

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Release Notes

Admin

End of TLS 1.0 Email – Targeted for Wednesday, June 27, 2018

In 2017, SAP Concur announced that it was ending support for version 1.0 of the TLS encryption protocol.

Be aware that – targeted for Wednesday June 27, 2018 – SAP Concur will disable the ability to accept incoming email ***via TLS 1.0 connectivity*** for plans@concurtravel.com and plans@tripit.com.

There should be very little customer impact since the vast majority of customers have already disabled the ability to send email via TLS 1.0.

Configuration / Feature Activation

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

Reminder Whitelist for TrustArc.com

Overview

The May release notes included an item named *New Cookie Preferences Link in the SAP Concur Footer*. It describes cookie-related process changes that were introduced in the May 12 release because of specific consent regulations in Europe.

To ensure that SAP Concur properly responds to the regulations, SAP Concur has enlisted the assistance of TrustArc, a global privacy and data governance provider. Please ensure that your organization's IT (or similar) department adds TrustArc to its whitelist, so TrustArc can properly monitor and manage these processes.

TrustArc must be whitelisted by domain – ***not IP*** – since the IP is variable. Please whitelist these domains:

- trustarc.com
- prefmgr-cookie.truste-svc.net

! **IMPORTANT:** Be aware that if TrustArc is not whitelisted, then it cannot present the required page to obtain the user's permission to accept cookies. That means that if a user's geolocation is France, Germany, or the Netherlands, the user may not be able to access concursolutions.com.

BUSINESS PURPOSE / CLIENT BENEFIT

Whitelisting ensures that TrustArc has the proper access to manage consent regulations on behalf of SAP Concur.

Configuration / Feature Activation

There are no configuration steps except to ensure that TrustArc is whitelisted for your organization.

Reminder New Cookie Consent Process

Overview

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

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

Each country decides which option it wants to use.

IMPORTANT

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

- TrustArc, a global privacy and data governance provider, manages the cookie preference choice of each user for SAP Concur. Several consent options are described on the following pages.
  - Be aware the TrustArc provides all consent text and manages all translations of the consent text. Neither SAP Concur nor its customers can affect the text or translation in any way.
  - Consent regulations differ by country. TrustArc determines the consent option that is appropriate for each user, based on each country's regulations. SAP Concur cannot affect that determination in any way nor does SAP Concur have a list of countries and their consent regulations.
- Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.
- SAP Concur uses geolocation – based on the user's IP address – to identify the user's location (country), which determines if user consent is active or passive. Be aware that if the user is using VPN, then geolocation will likely identify the user's country as the country associated with the VPN.

- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. ***There is no option for companies to make these choices for their users.***
- Once a user has actively accepted cookies, they cannot modify their cookies options to stop accepting cookies except to remove all cookies and start over.

BUSINESS PURPOSE / CLIENT BENEFIT

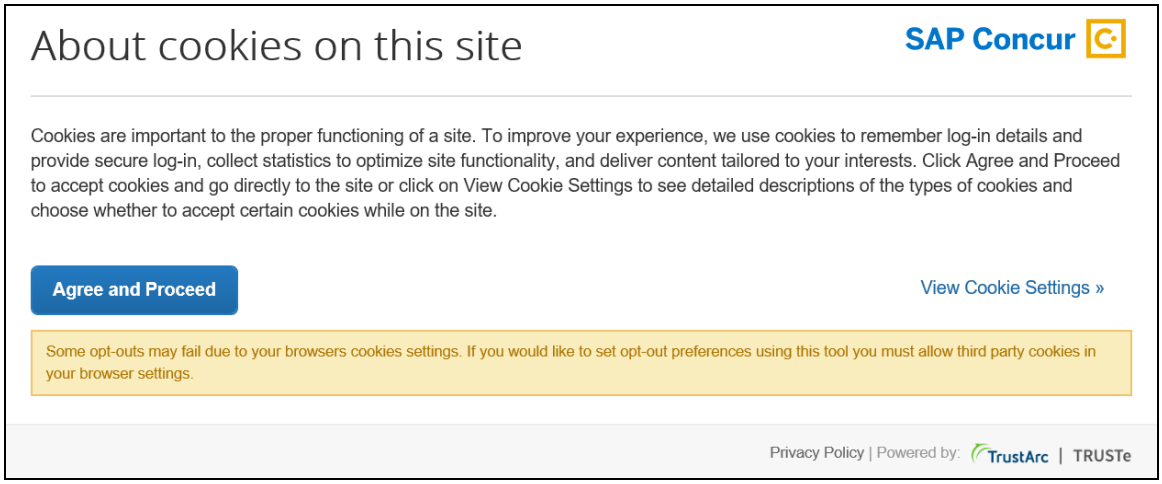
These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

As noted above, each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of any type – without user consent. In fact, a user cannot even access SAP Concur without first being presented the option to accept cookies.

ACTIVE CONSENT REQUIRED

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

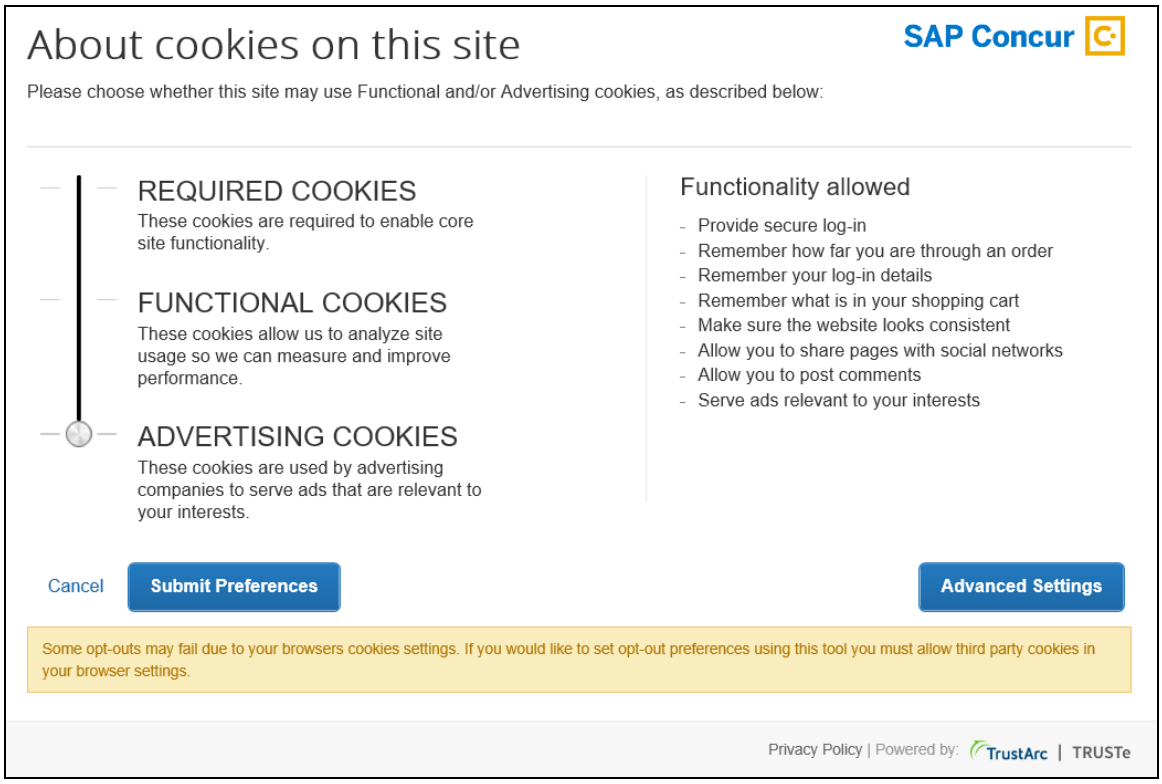


The user can:

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

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

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



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

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

The user can:

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

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

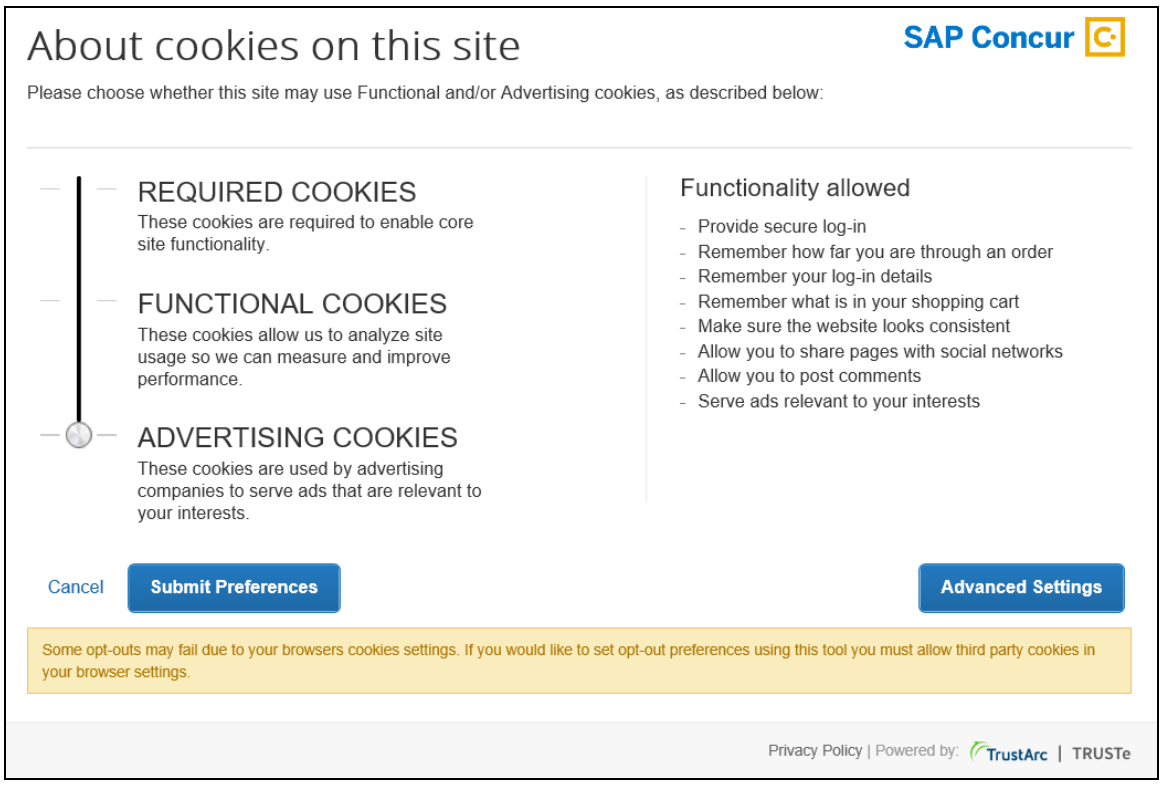
Once the user consents, the requirement is satisfied and the consent message does not appear again.

PASSIVE CONSENT

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

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

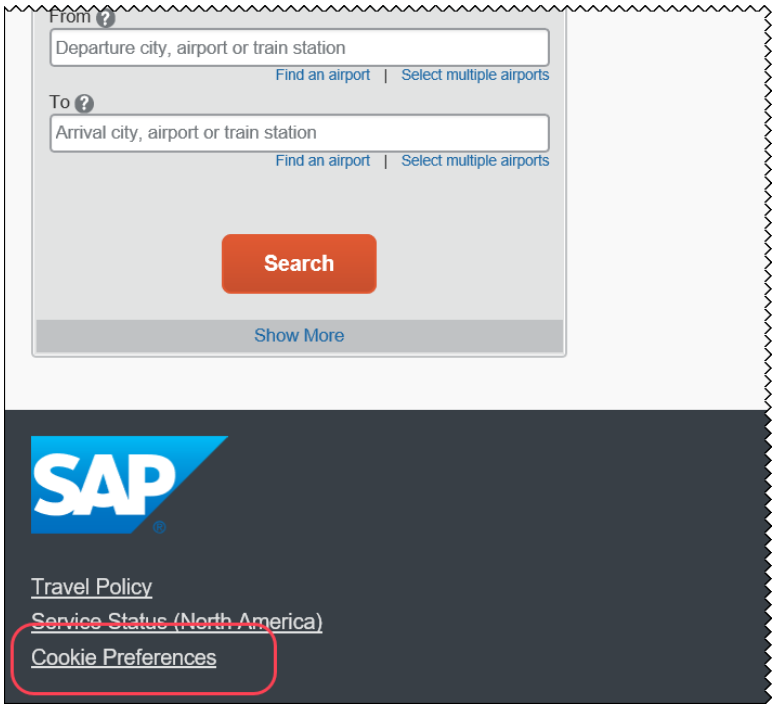
The user clicks **Want to know more?**, the user sees the cookie options (as described previously).



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

MAKING CHANGES

The **Cookie Preferences** link appears in the SAP Concur footer.



This link allows users to view their existing cookie settings. To modify existing cookie preferences, TrustArc requires that the user clear all existing cookies and then choose a new setting.

! **IMPORTANT:** Not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Cookie Preferences** link there.

Configuration / Feature Activation

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

Change Log

Now Logging When a Delegate is Assigned

Overview

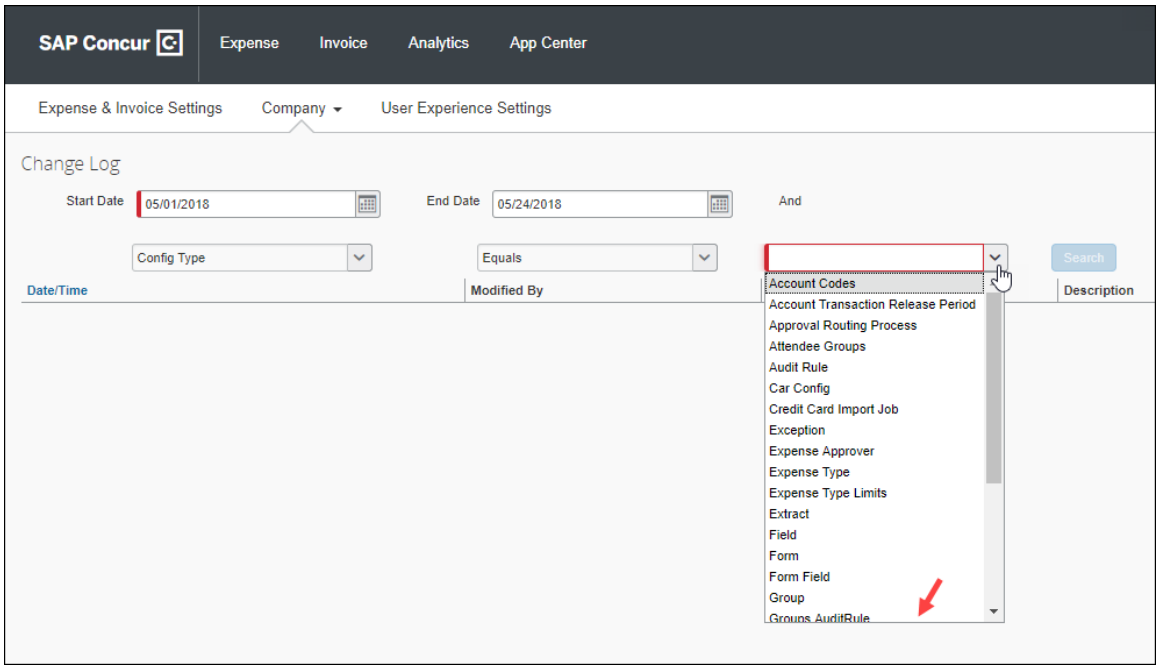
When a user adds a delegate, the act of adding will leave an audit trail. The steps for adding a delegate are unchanged and this change includes delegates that are added using either the user interface or an Excel import. This change is only for adding delegates, not for removing them.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enhances audit capabilities.

What the Admin Sees

The **Change Log** page displays a new list item, *Employee Delegation*.



Configuration / Feature Activation

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

Expense Pay – Global

(United States) Additional Card Program Now Supported for USD

Overview

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

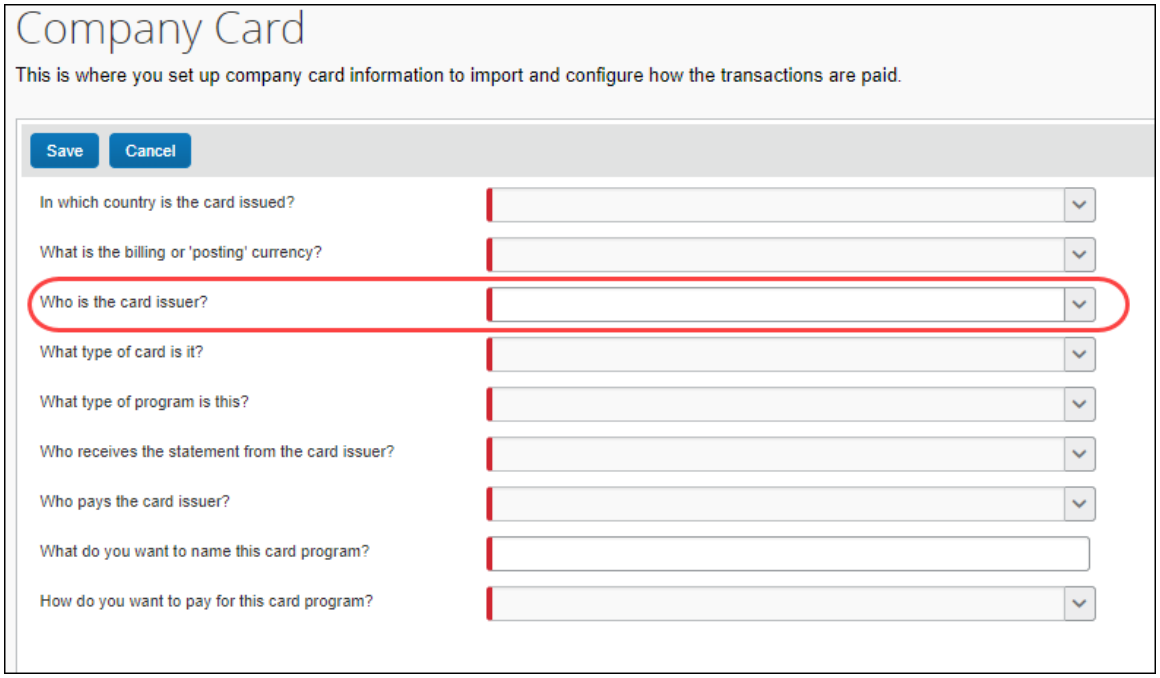
- Silicon Valley Bank MasterCard USD

BUSINESS PURPOSE / CLIENT BENEFIT

This additional option can expedite the processing of credit card expenses.

What the Admin Sees

These additional card programs are available to admins on the **Administration > Expense Settings > Connections > Credit Cards > New** page.



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Ongoing New User Interface for Concur Expense End Users

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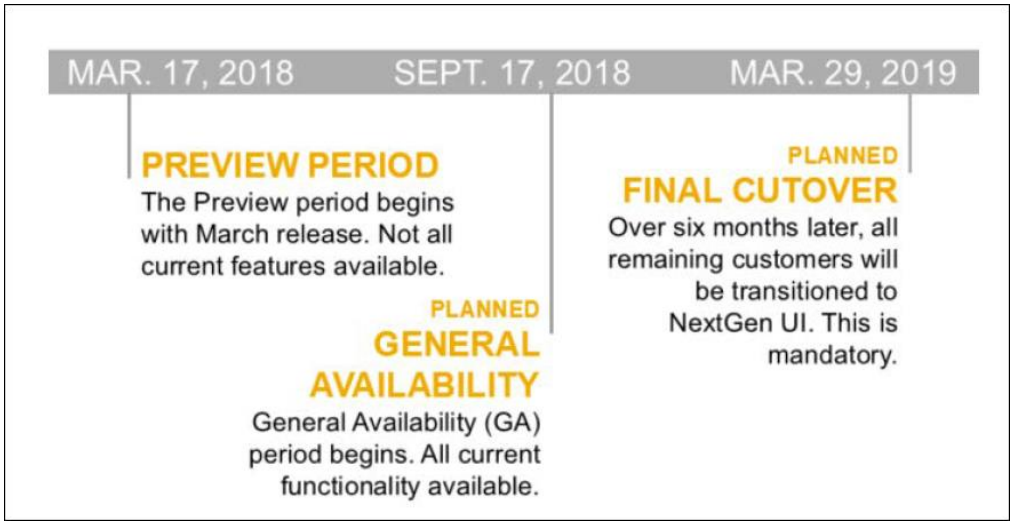


BUSINESS PURPOSE / CLIENT BENEFIT

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

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

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

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

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

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

QuickBooks

QuickBooks Connector: Ending Support for QuickBooks 2015

Overview

Per Intuit, after May 31, 2018, access to add-on services will be discontinued for QuickBooks Desktop 2015 (Windows and Mac). This includes all versions of QuickBooks Desktop 2015 (Pro, Premier, Enterprise Solutions, Accountant Edition, and Mac). The Concur QuickBooks Connector will still work with QuickBooks 2015, however Concur Customer Support will no longer provide support for QuickBooks 2015 after May 31, 2018 to maintain alignment with Intuit's QuickBooks support policy.

Concur Customer Support will provide support for the following version of QuickBooks:

- QuickBooks 2016
- QuickBooks 2017
- QuickBooks 2018

The currently supported versions of the QuickBooks Web Connector are:

- 2.2.0.71
- 2.2.0.80

BUSINESS PURPOSE / CLIENT BENEFIT

This update aligns the Concur Customer Support policy with the Intuit Support policy for QuickBooks versions.

Configuration / Feature Activation

There are no configuration or activation steps. Contact Intuit with any questions regarding the support policy of QuickBooks Desktop 2015.

Planned Changes

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

Admin

Planned Changes Expense Assistant Can Create Trip-based Expenses Reports

Overview

Admins can now pre-configure Expense Assistant options.

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

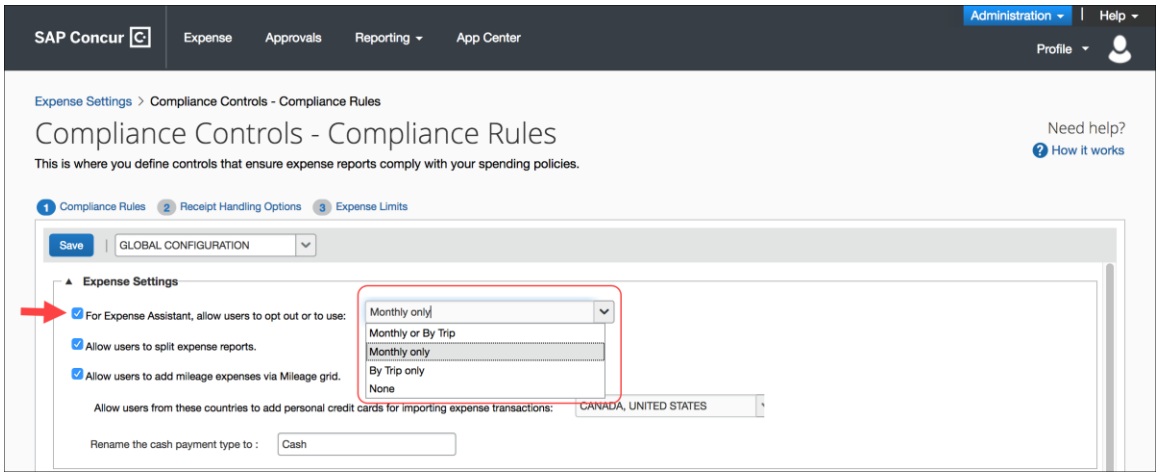
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Expense Settings > Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use** field's list will show the new choices.

With this field, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users, and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration remains unchanged.

For new clients, by default, **For Expense Assistant, allow users to opt out or to use** is enabled and *Monthly or By Trip* is selected from the list.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Expense Settings > Compliance Controls – Compliance Rules** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list.

Until the trip-based expense report functionality for Expense Assistant is completed in a future release, Expense Assistant will continue creating calendar-based expense reports for the users if you select the *Monthly or By Trip* or *Monthly* only options in the **For Expense Assistant, allow users to opt out or to use** field.

If you select the *By Trip only* or *None* options, Expense Assistant will be disabled for all your users and they will not see any Expense Assistant functionality.

📖 For more information about Expense Assistant, refer to the *FAQ - Expense Assistant* available from the fact sheet landing page.

Planned Changes Personalized Concur Open

Overview

Concur Open is the SAP Concur real-time service status dashboard, which displays outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

In a future release, there will be new functionality added to Concur Open. Users will continue to access Concur Open and view Concur service availability. However, in addition, SAP Concur users will be able to log in to Concur Open and:

- View service status for the services and the data center specific to their company
- Access subscription options for updates about the incidents that impact the services specific to their company
- View service history for the past two years, including detailed root cause analysis information and the actions taken by SAP Concur for each incident

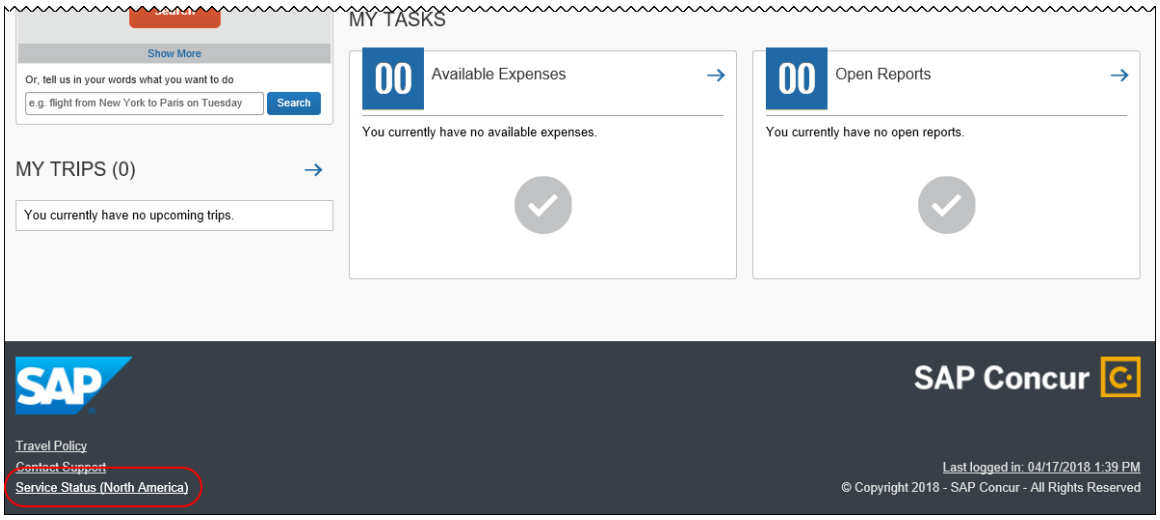
BUSINESS PURPOSE / CLIENT BENEFIT

Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding this new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

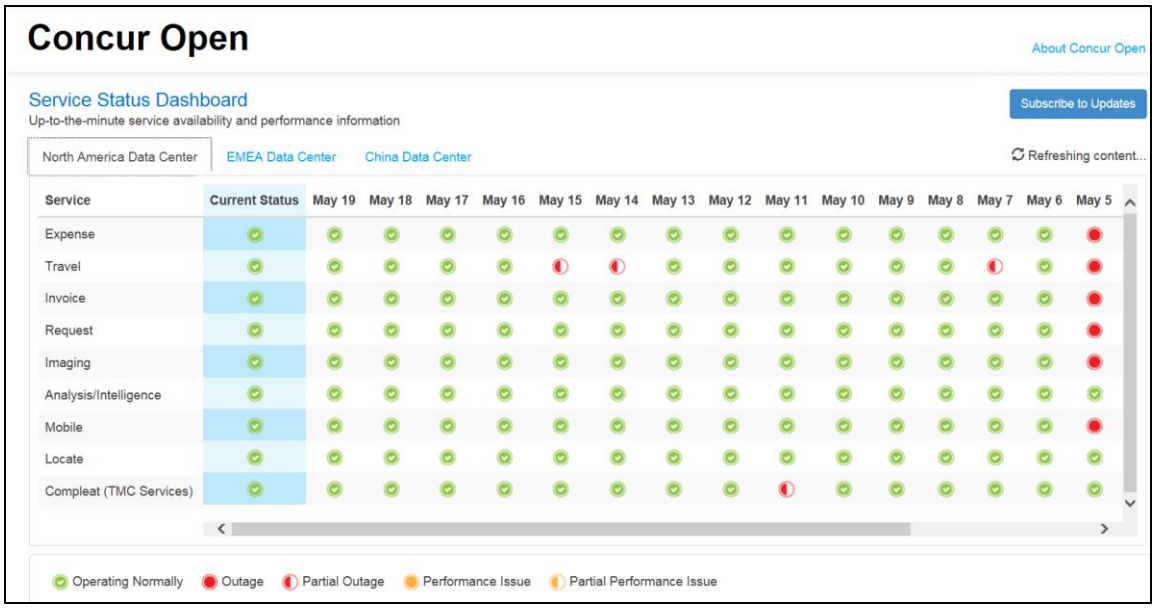
Users can access Concur Open two ways:

- Enter the public site directly using https://open.concur.com
  – or –
- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



Concur Open appears.

What the User Sees – Current View



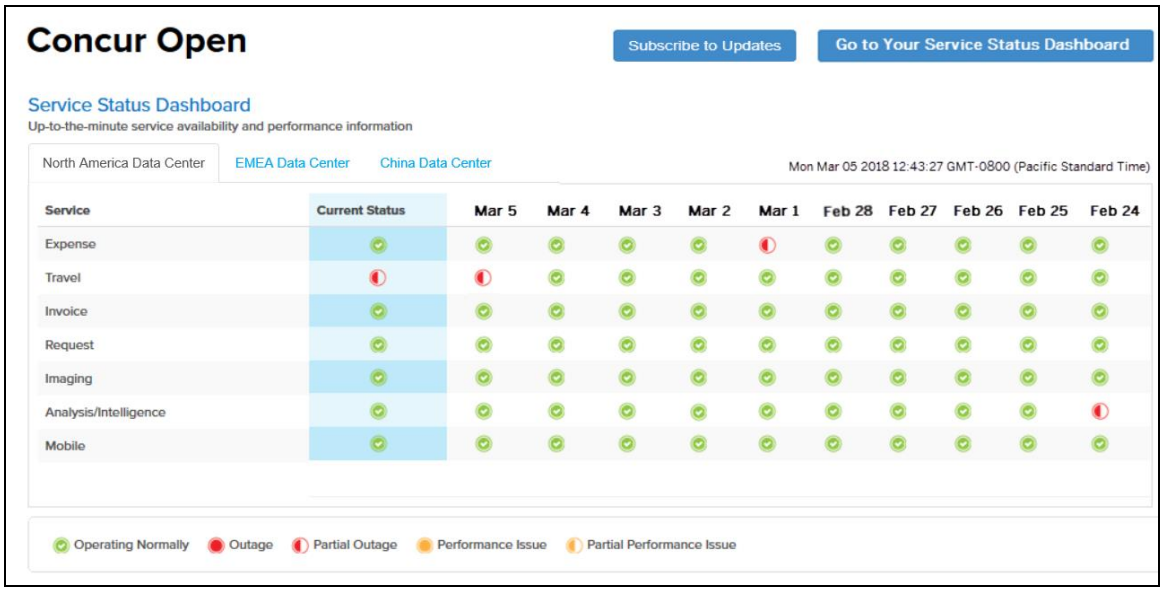
The user sees the data center tabs, the service activity (up to the previous 20 days), the legend (bottom of the page), and the **Subscribe to Updates** button (upper-

right corner). The user can click **Subscribe to Updates** to request notifications for service and incident changes.

What the User Sees – New View and Process

The user will access Concur Open the same way they do now – either via the public site (open.concur.com) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.



Just like before, the user can see all data centers and services and can use the **Subscribe to Updates** button. In fact, that will not change – anyone can access the public version (open.concur.com) and anyone can request notifications.

NOTE: The ability for non-customers to request notifications will likely be eliminated in the future.

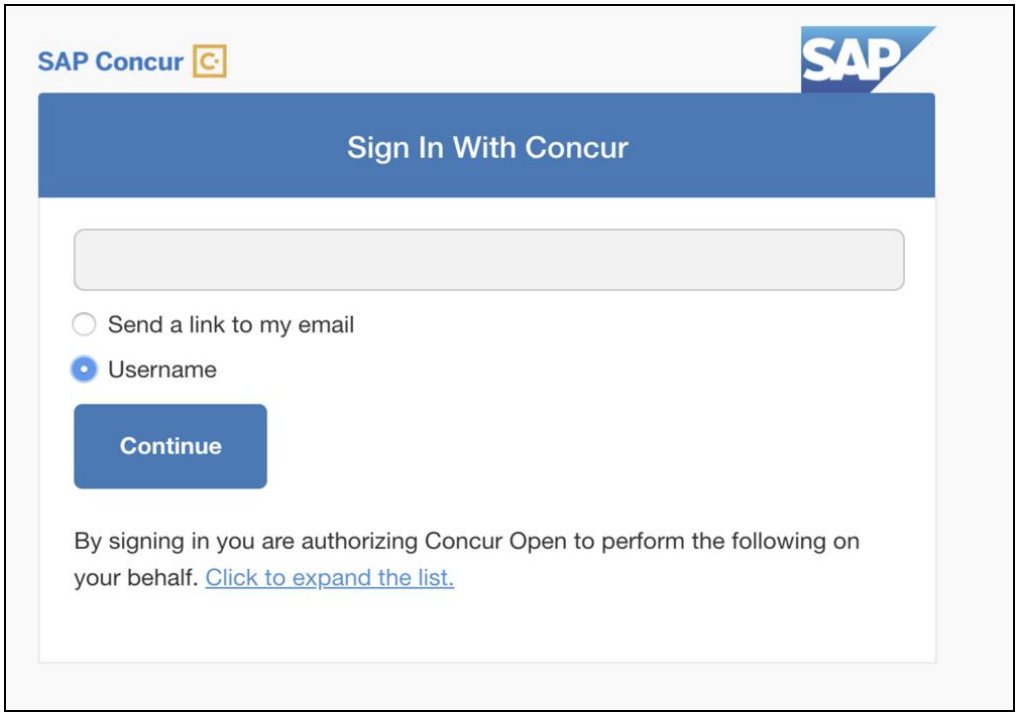
With the release of Personalized Concur Open, the main change is that the **Go to Your Service Status Dashboard** button also appears on the main page. Whether the user accesses Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

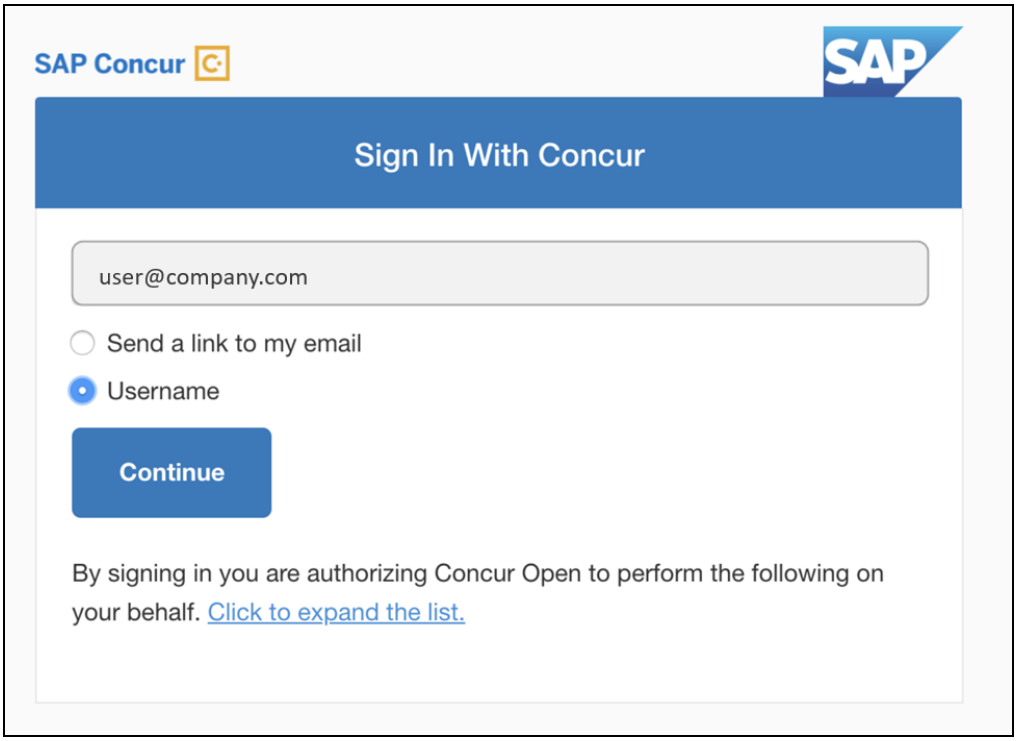
- For customers that do not use SSO, users sign in with their SAP Concur username and password.
- For customers that do use SSO, users can access the personalized view using their email address (described below).

On the main page, the user clicks the **Go to Your Service Status Dashboard** button. The **Sign In With Concur** page appears.



Then, depending on the customer's implementation of SAP Concur:

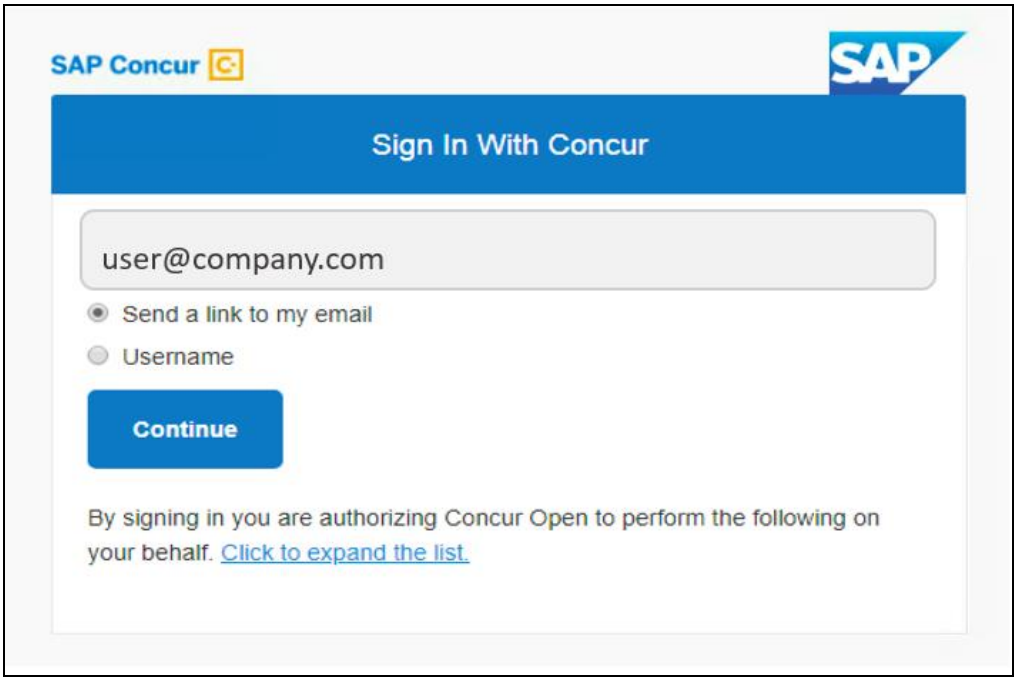
- **Username and password:** If the user signs in to SAP Concur using username and password:



Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**. This page appears.

The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

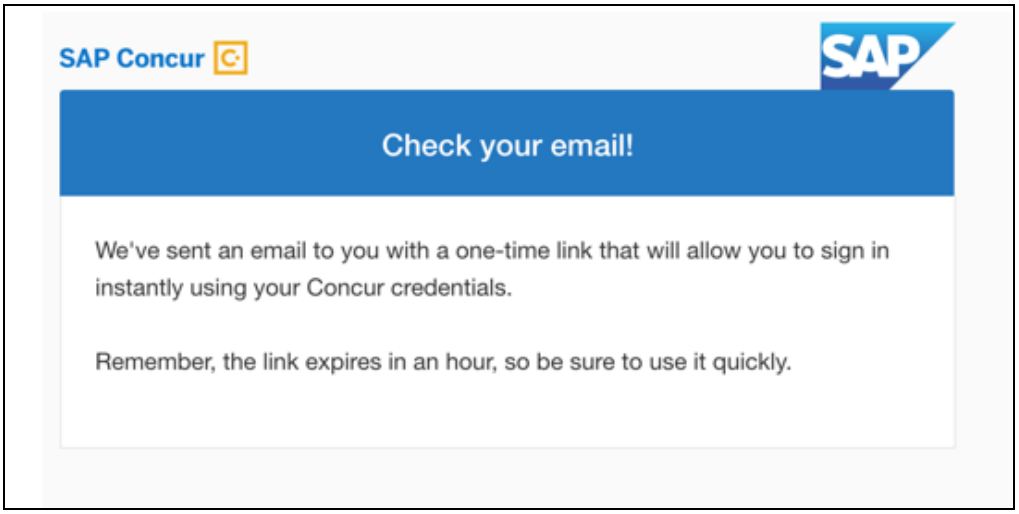
- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:



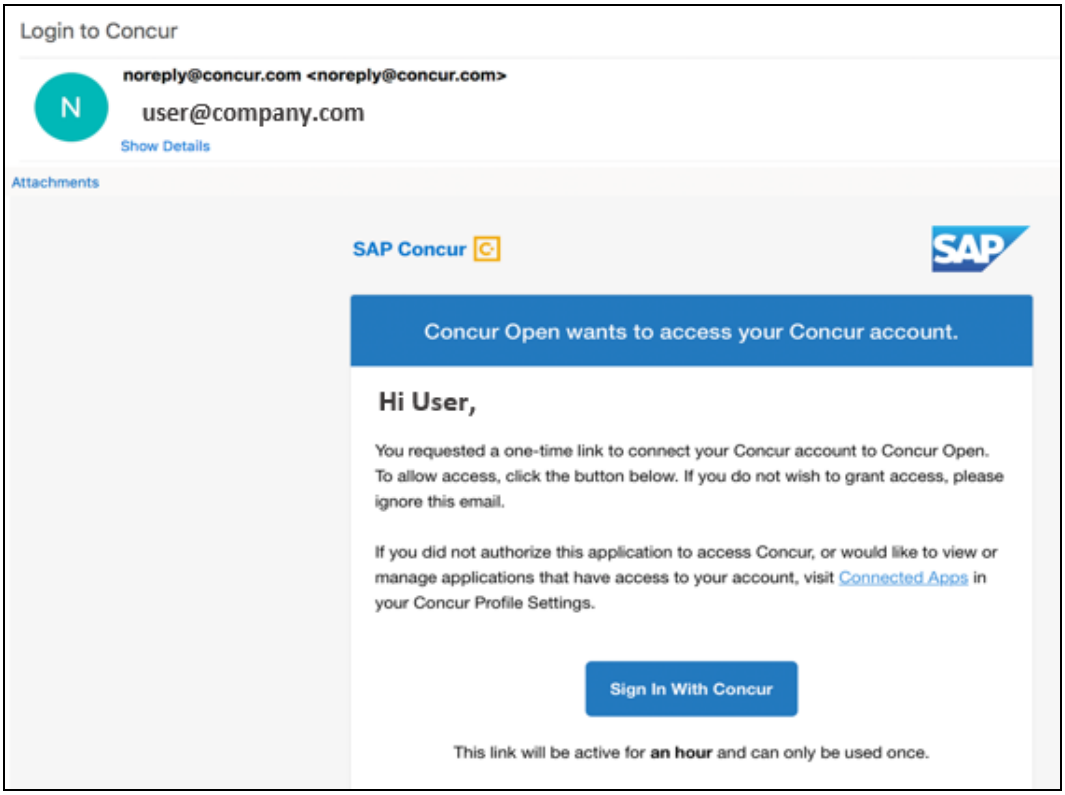
Then, on this page, the user enters their email address (see below), clicks **Send a link to my email**, and clicks **Continue**.

! **IMPORTANT:** SAP Concur compares the email address entered by the user to the email address(es) in the user's SAP Concur profile. (This is not restricted to the **Email 1** field; this includes all email addresses in the **Email Addresses** section in the user's profile.) If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

This message appears:



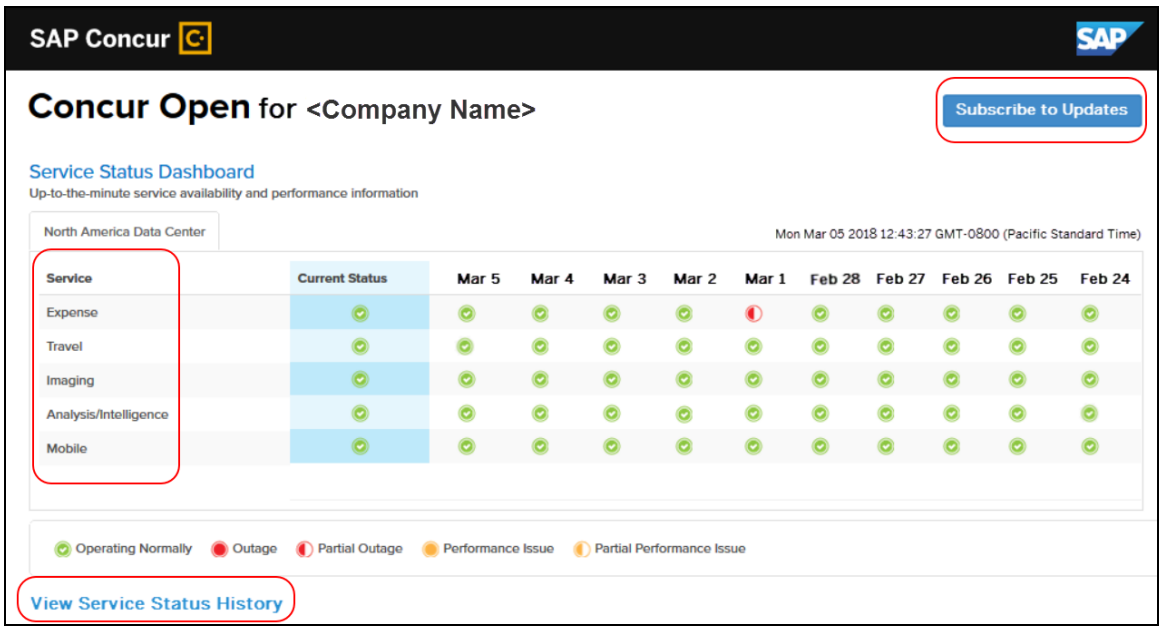
An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. Personalized Concur Open appears.

NOTE: The one-time link is active for one hour. If the user closes the browser and if the user wants to return to the personalized view, the user must request another one-time link.

Once signed in, the personalized **Service Status Dashboard** page appears.

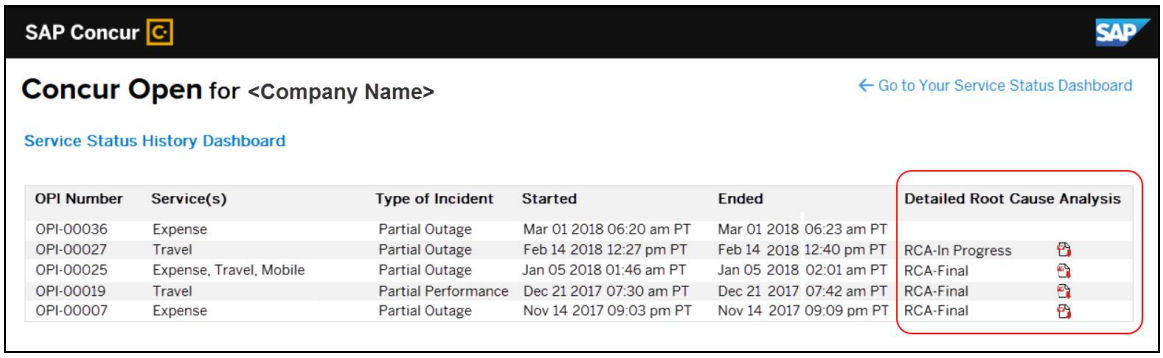


On this page, the user can:

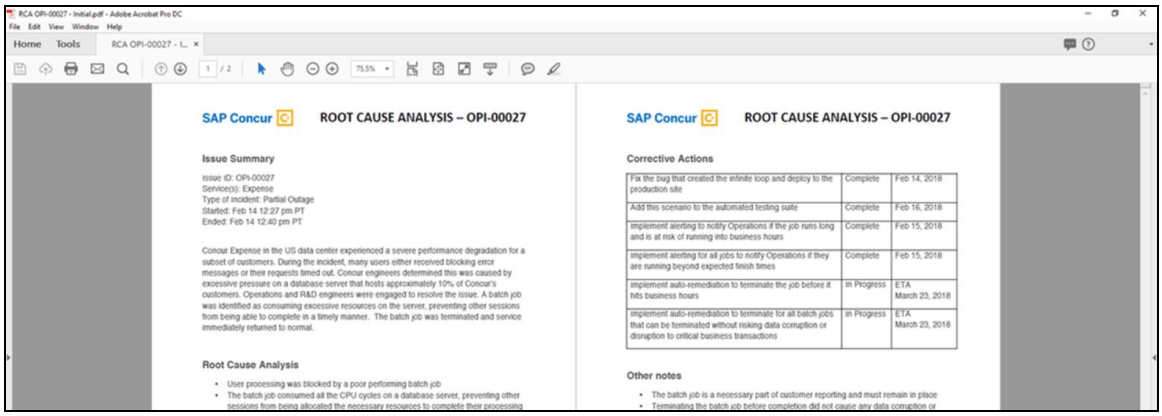
- View:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company. The accuracy of determining this is not perfect, so it is possible that a customer may be shown an incident that did not actually affect them.
- Subscribe to updates

VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



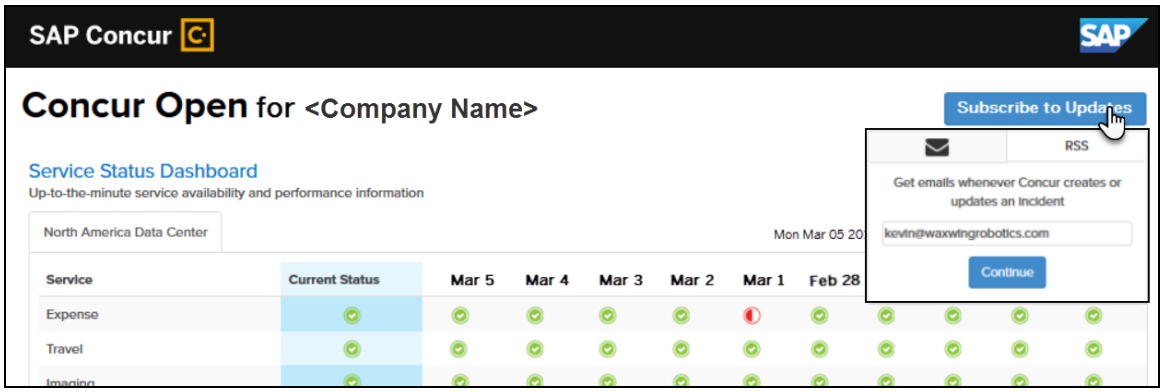
The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for each incident.



The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

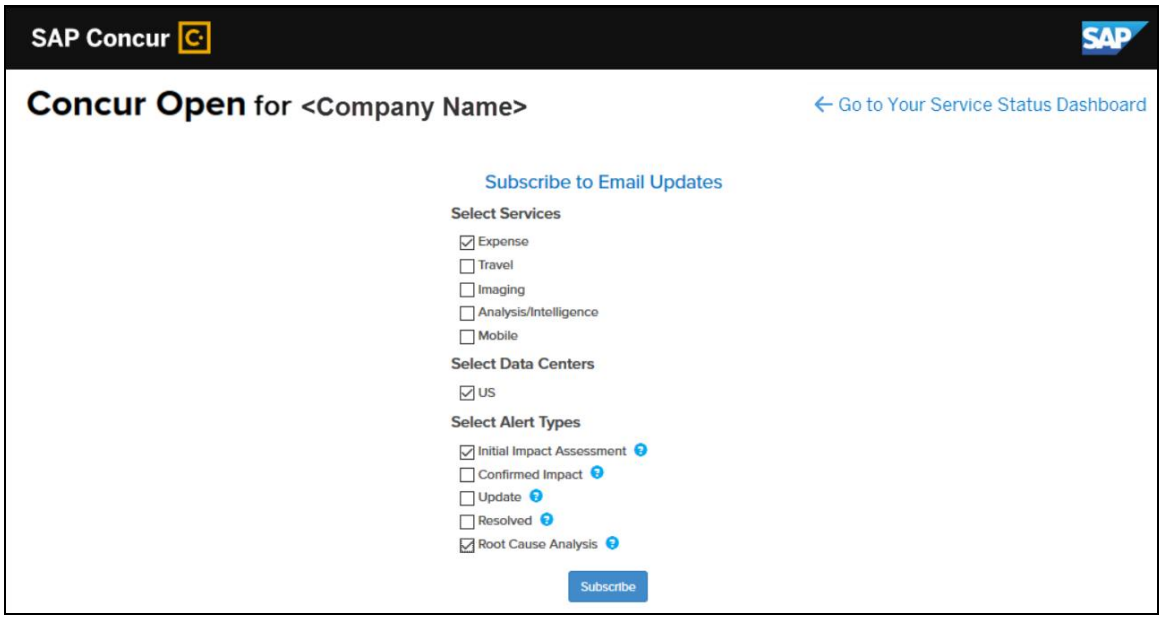
SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.

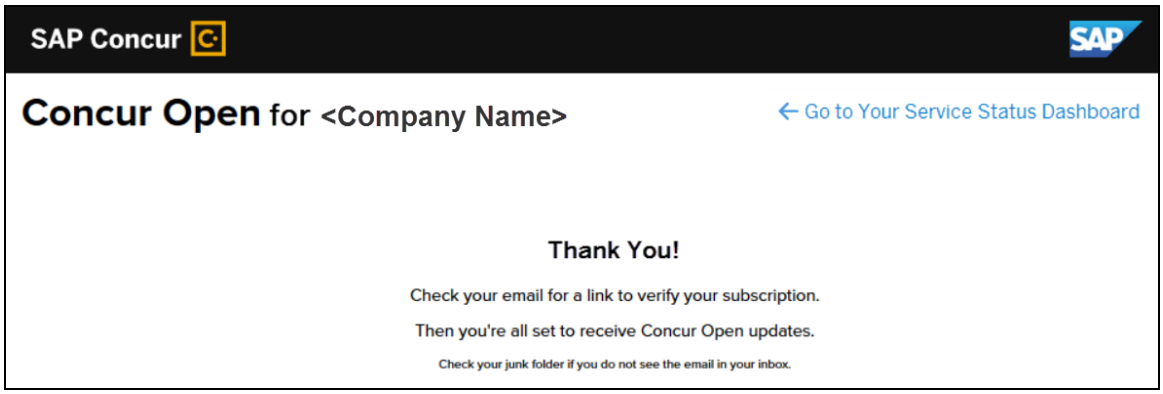


To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address. The user can enter only one email address. It can be their email address associated with their Concur profile, their personal email address, or any other email address.

The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

Note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
  - Set the user's new subscription to match the company's services and data center
  - Notify the user of the change

  NOTE: Best practice – after the new view is available – is to sign in to the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user subscription will remain the same (not personalized).

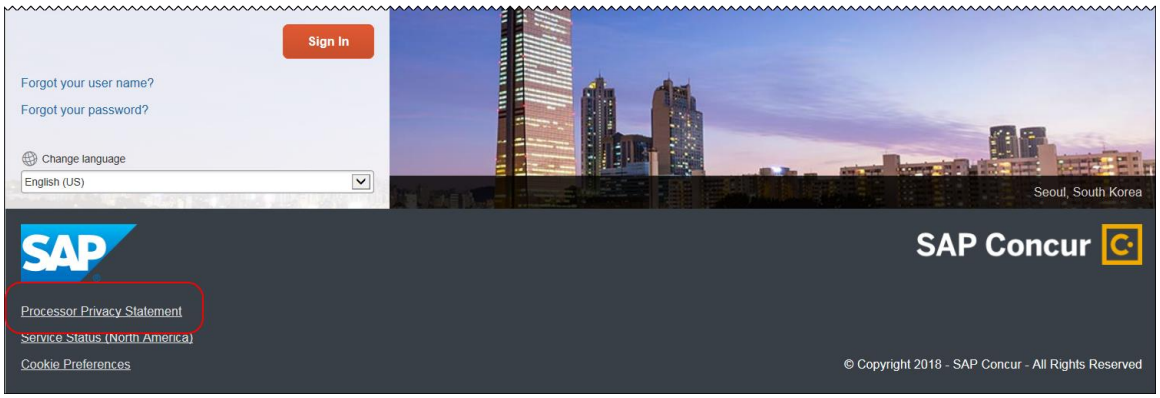
Configuration / Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Planned Changes Processor Privacy Statement Link in Online Help – Targeted for July

Overview

The **Processor Privacy Statement** link is available in the SAP Concur footer.



However, not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Processor Privacy Statement** link there.

Also – targeted for July – SAP Concur will add the **Processor Privacy Statement** link to online Help.

Configuration / Feature Activation

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

Plain Text File Transfer Protocol (FTP)

Planned Changes Support for Plain Text FTP to End on September 1st, 2018

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

! **IMPORTANT:** SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, Concur Operations will apply a security update to our File

Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

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

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

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

📖 For more information, please refer to the Client FAQ and the *File Transfer User Guide*.

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

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

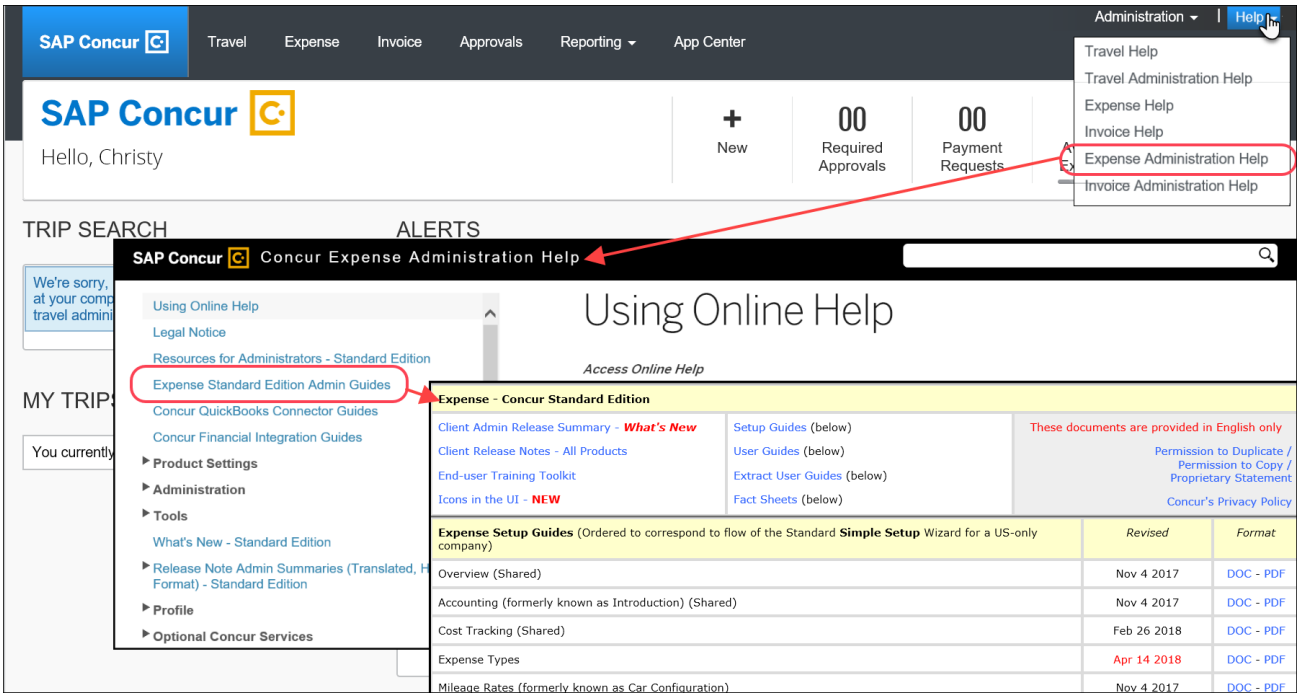
The list of non-affiliated subprocessors is available here: SAP Concur list of Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

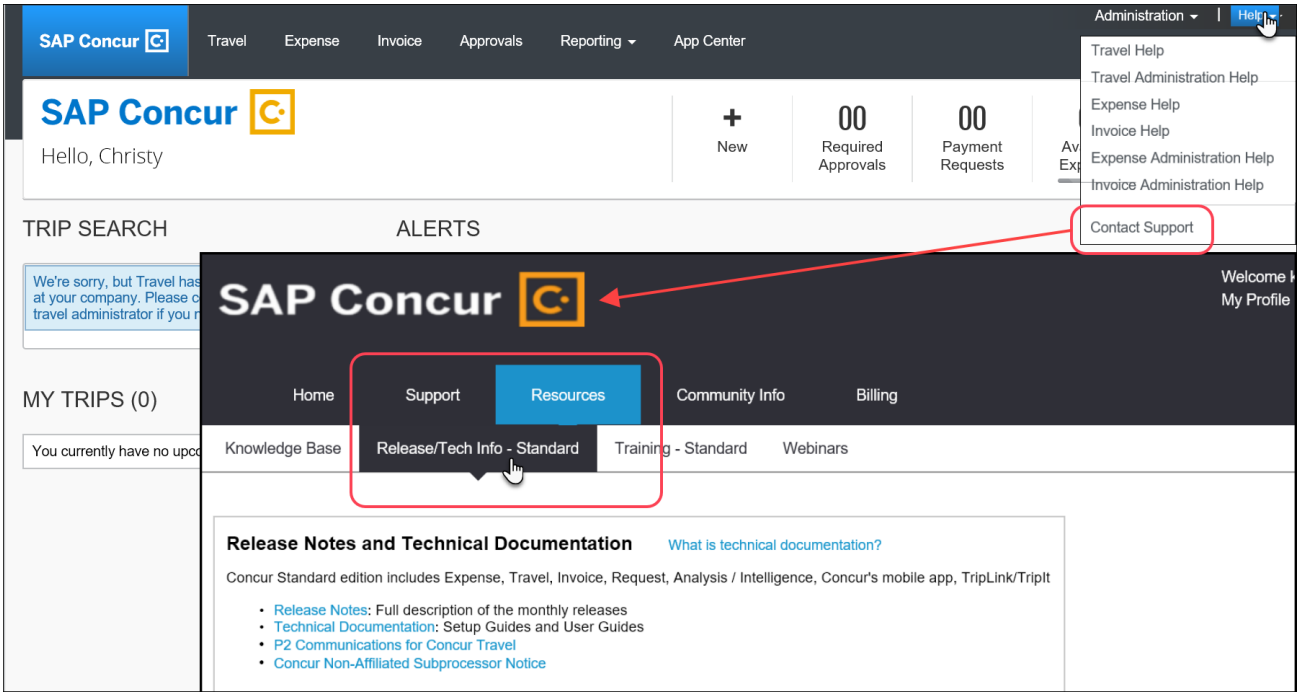
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: July 21, 2018 Initial Post: Friday, July 20, 10:30 AM PT	SAP Concur Client ***FINAL***

Contents

Legal Disclaimer

Release Notes

Admin

Personalized Concur Open – Targeted for End of July

Overview

Concur Open is the SAP Concur real-time service status dashboard, which displays outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

Targeted for the end of July, there will be new functionality added to Concur Open. Users can continue to access Concur Open and view Concur service availability; no functionality will be removed. However, with the release, SAP Concur users will be able to log in to Concur Open and:

- View service status for the services and the data center that are specific to their company
- Access subscription options for updates about the incidents that impact the services specific to their company
- View service history for the past two years, including detailed root cause analysis information and the actions taken by SAP Concur for each incident

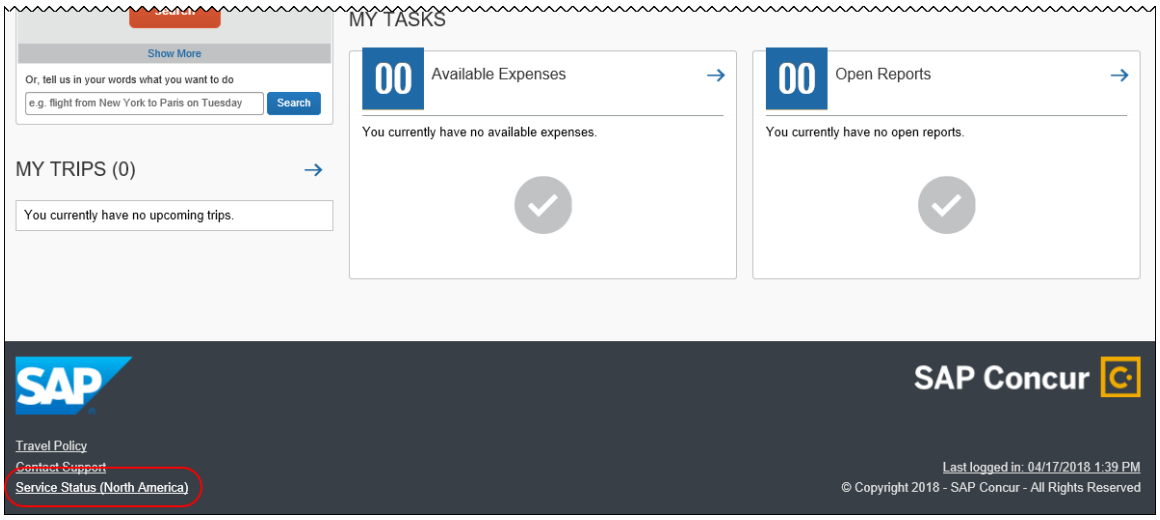
BUSINESS PURPOSE / CLIENT BENEFIT

Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding the new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

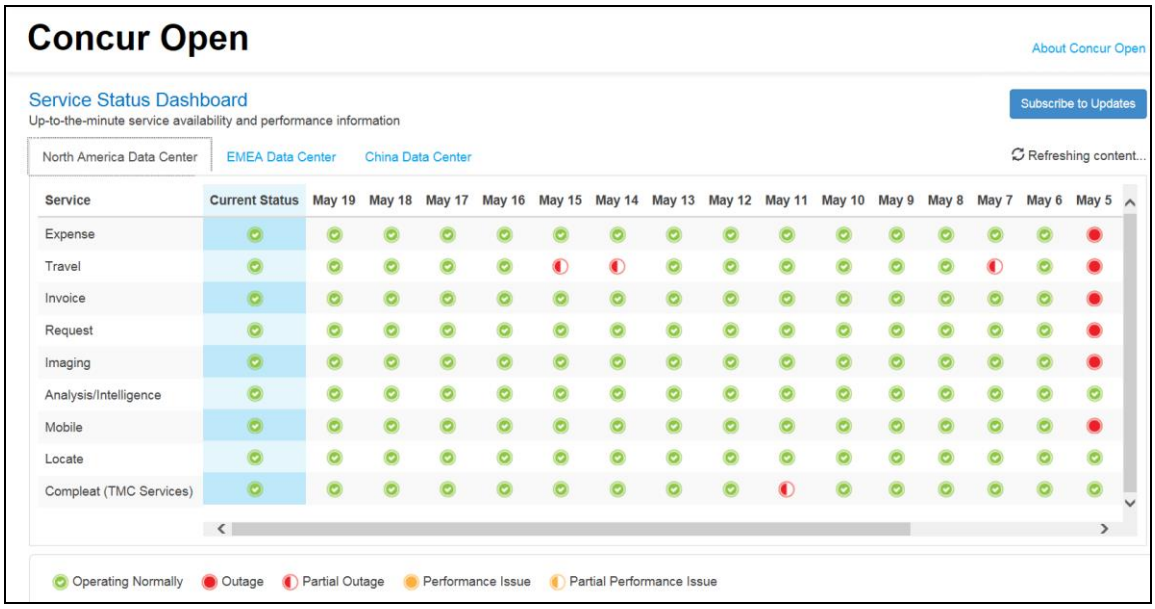
Users can access Concur Open two ways:

- Enter the public site directly using https://open.concur.com
  – or –
- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



Concur Open appears.

What the User Sees – Current View



The user sees all data center tabs, the service activity (up to the previous 20 days), the legend (bottom of the page), and the **Subscribe to Updates** button (upper-

right corner). The user can click **Subscribe to Updates** to request notifications for service and incident changes.

What the User Sees – New View and Process

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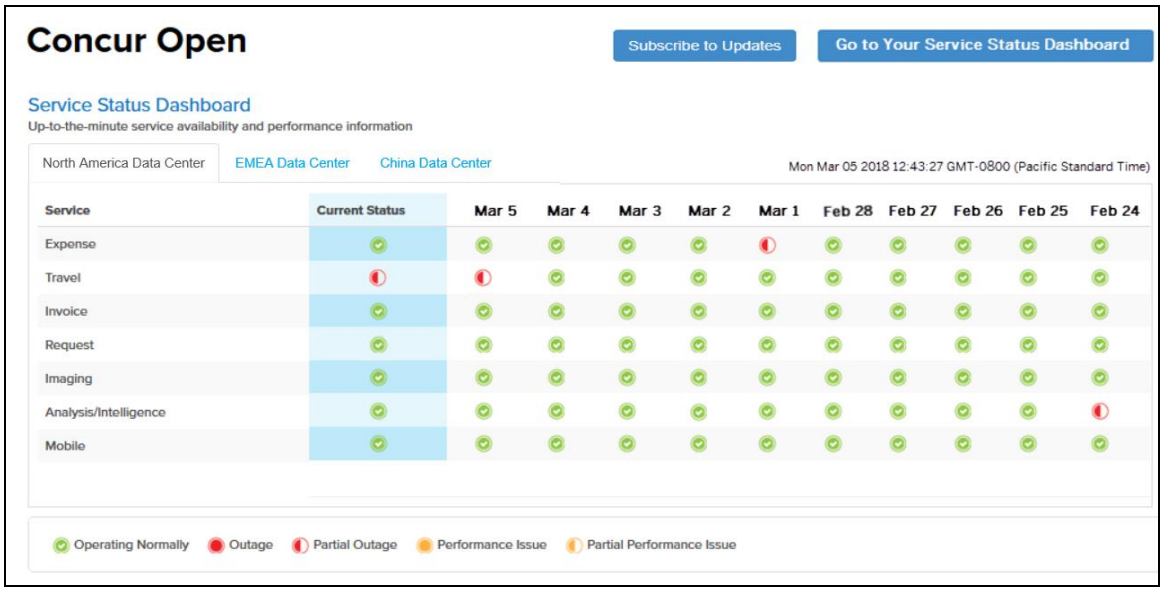
The initial page – regardless of how it is accessed – is similar to the existing page.



Just like before, the user can see all data centers and services and can use the **Subscribe to Updates** button. In fact, that will not change – anyone can access the public version (open.concur.com) and anyone can request notifications.

NOTE: The ability for non-customers to request notifications will likely be eliminated in the future.

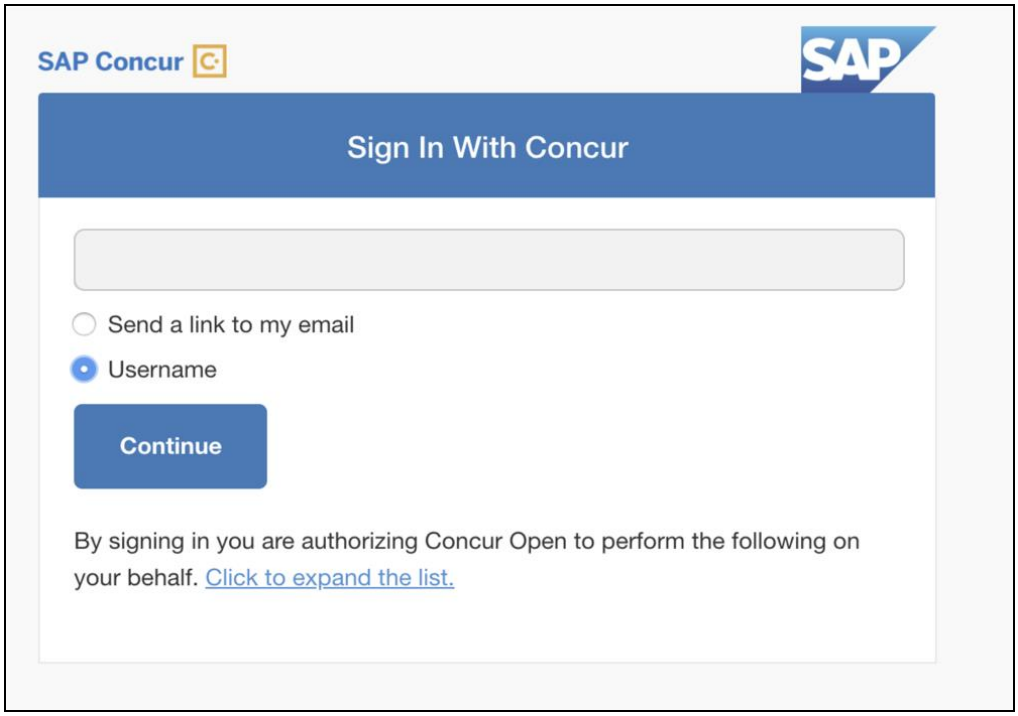
With the release of Personalized Concur Open, the main change is that the **Go to Your Service Status Dashboard** button also appears on the main page. Whether the user accesses Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

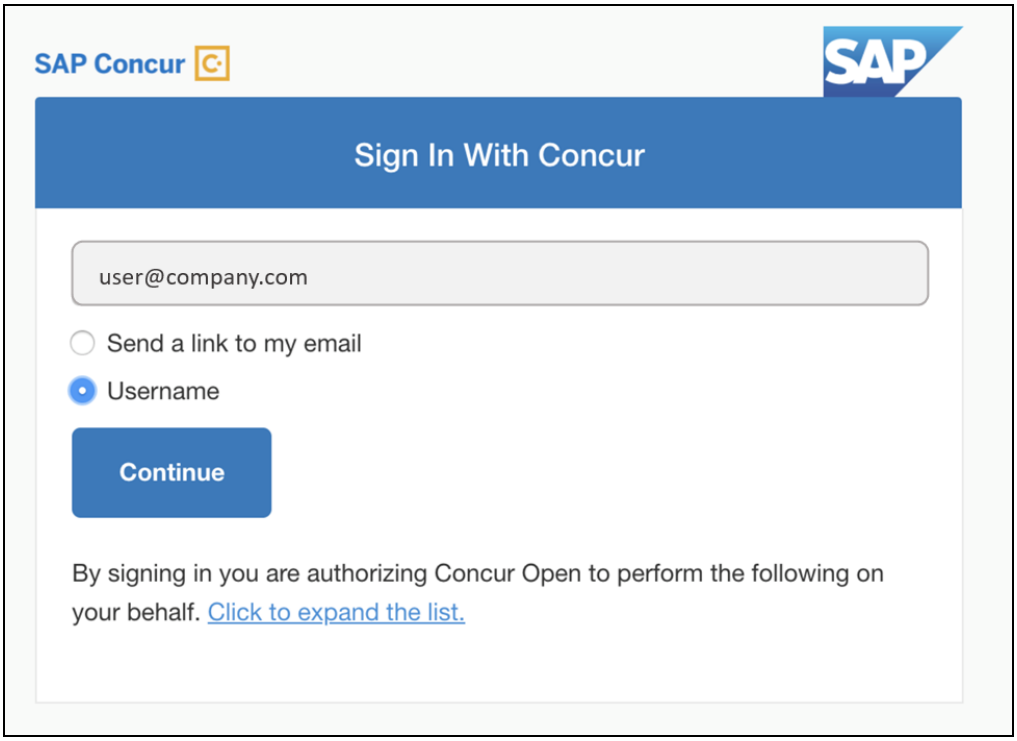
- For customers who do not use SSO, users sign in with their SAP Concur username and password.
- For customers who do use SSO, users can access the personalized view using their email address (described below).

On the main page, the user clicks the **Go to Your Service Status Dashboard** button. The **Sign In With Concur** page appears.



Then, depending on the customer's implementation of SAP Concur:

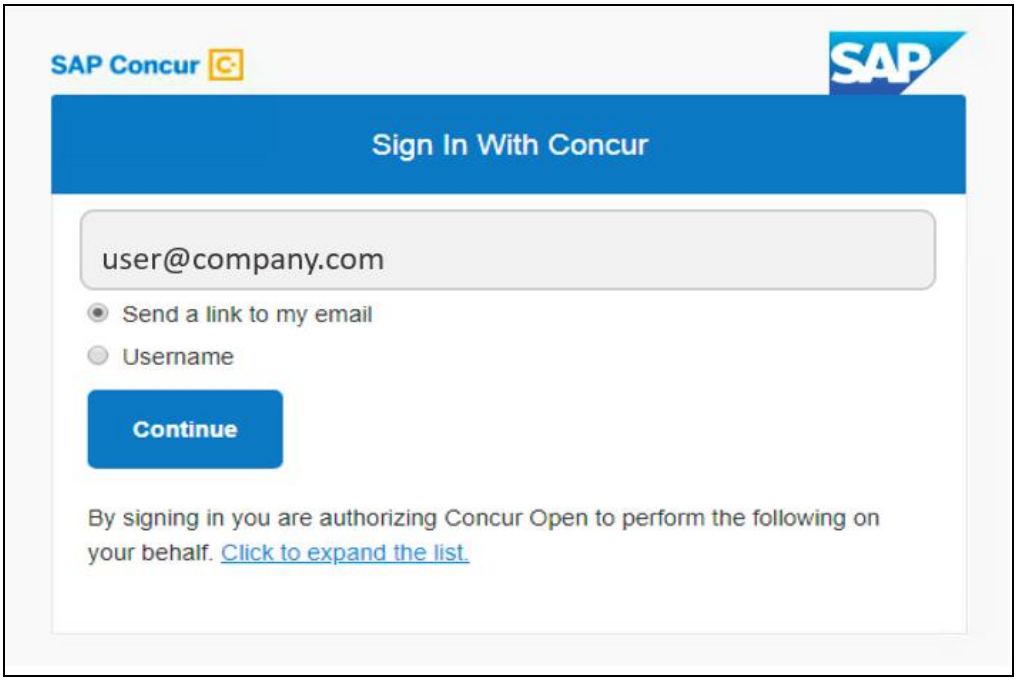
- **Username and password:** If the user signs in to SAP Concur using username and password:



Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**. This page appears.

The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

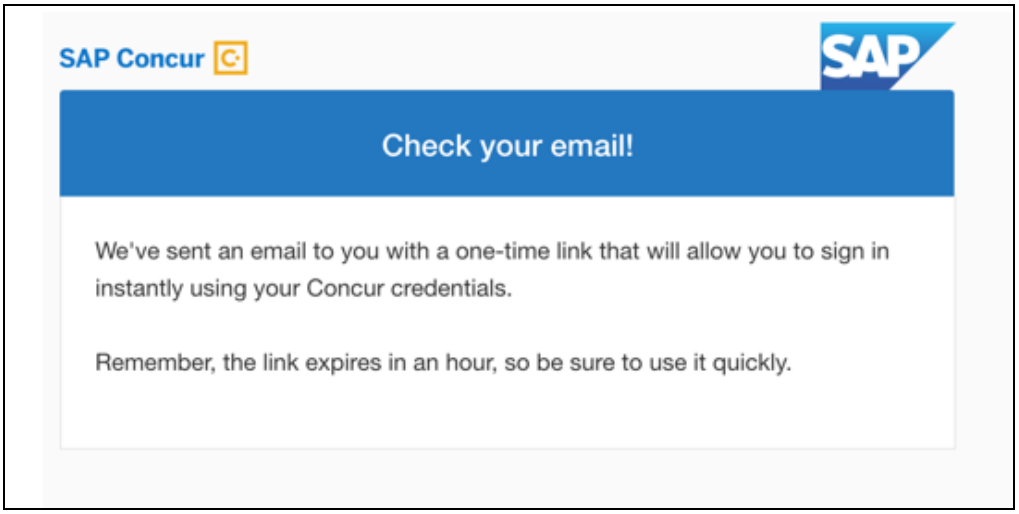
- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:



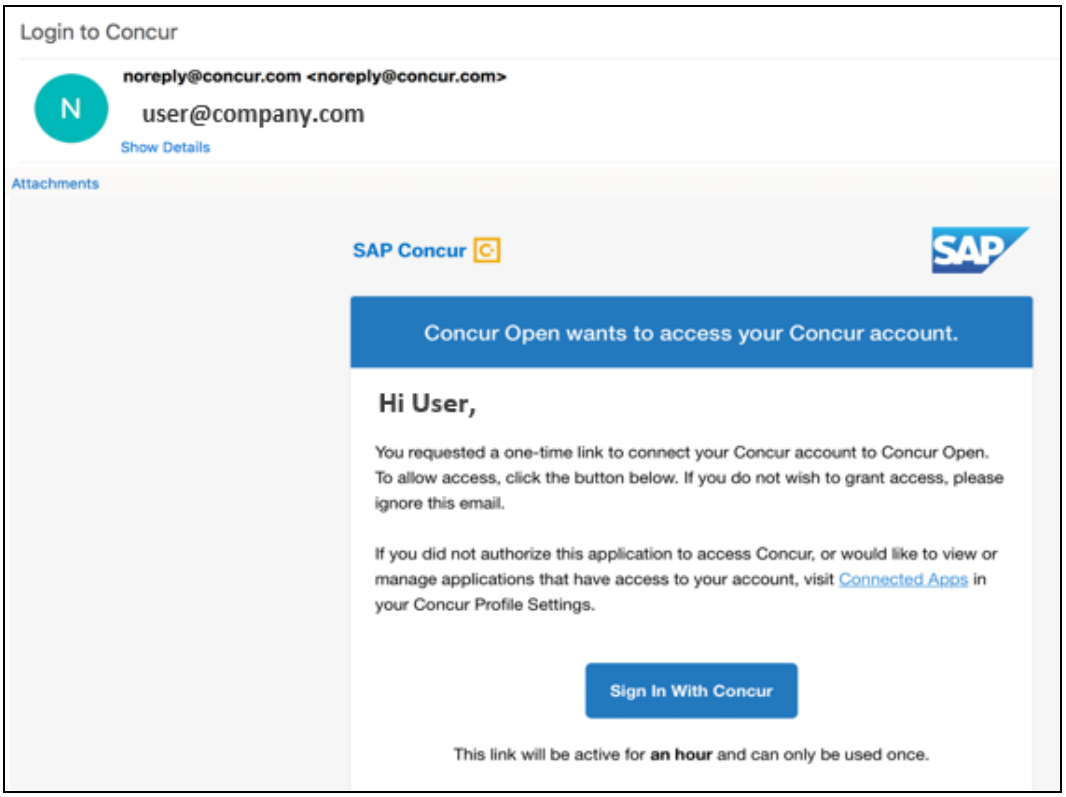
Then, on this page, the user enters their email address (see below), clicks **Send a link to my email**, and clicks **Continue**.

⚠ **IMPORTANT:** SAP Concur compares the email address entered by the user to the email address(es) in the user's SAP Concur profile. (This is not restricted to the **Email 1** field; this includes all email addresses in the **Email Addresses** section in the user's profile.) If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

This message appears:



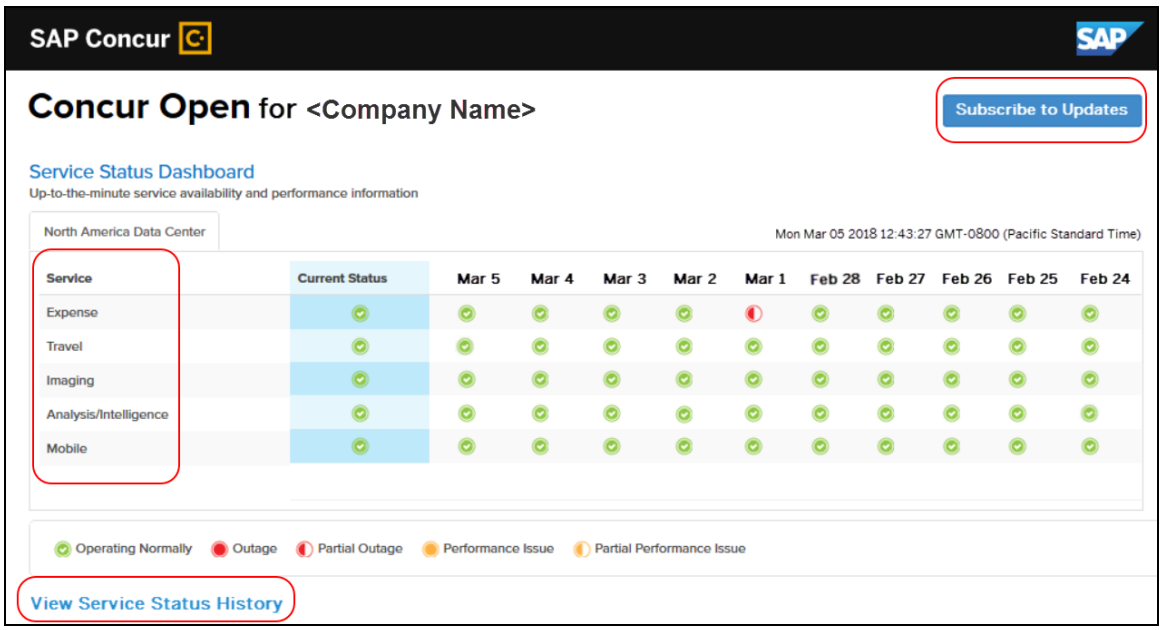
An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. Personalized Concur Open appears.

NOTE: The one-time link is active for one hour. If the user closes the browser, then the user must request another one-time link when they want to return to the personalized view.

Once signed in, the personalized **Service Status Dashboard** page appears.

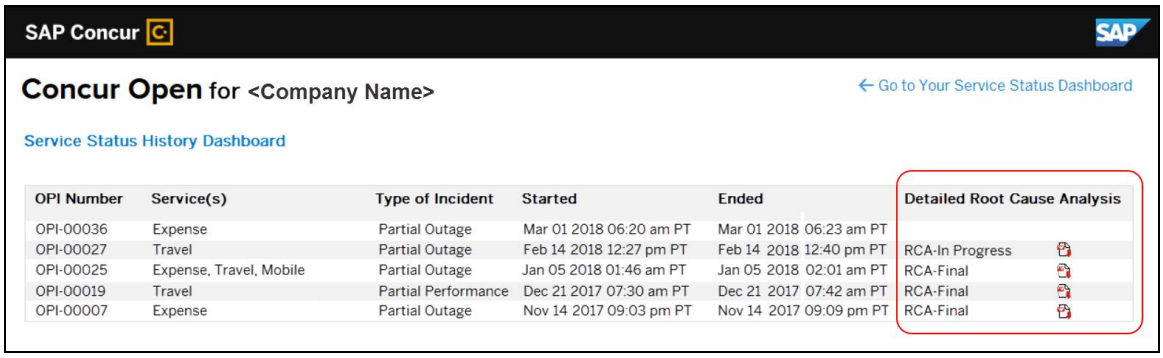


On this page, the user can:

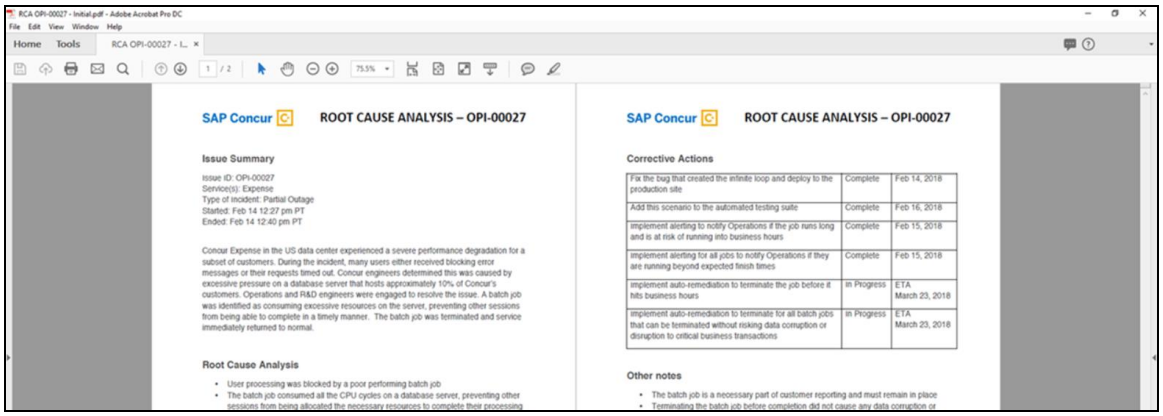
- View:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company. The accuracy of determining this is not perfect, so it is possible that a customer may be shown an incident that did not actually affect them.
- Subscribe to updates

VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



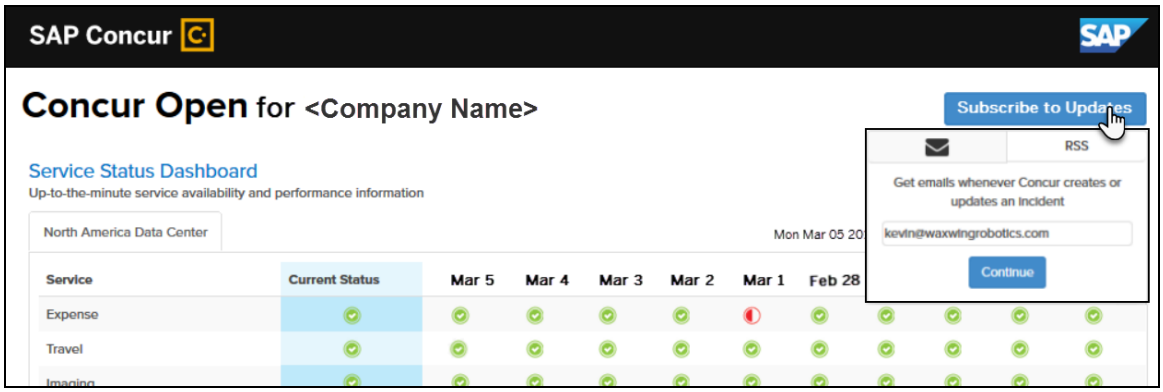
The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for each incident.



The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

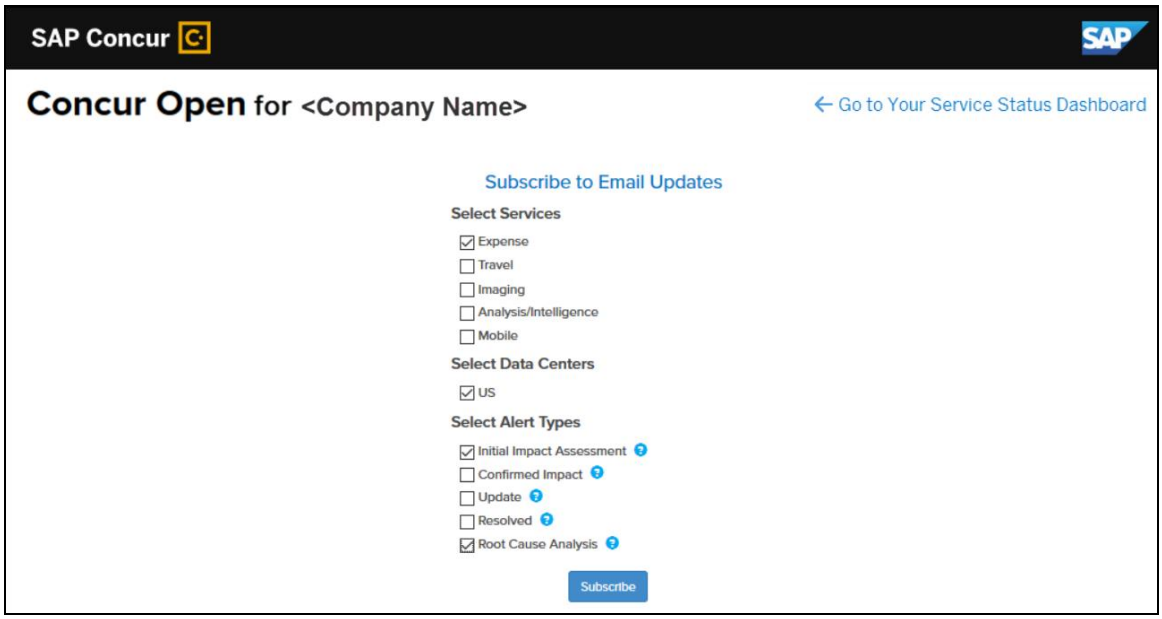
SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.

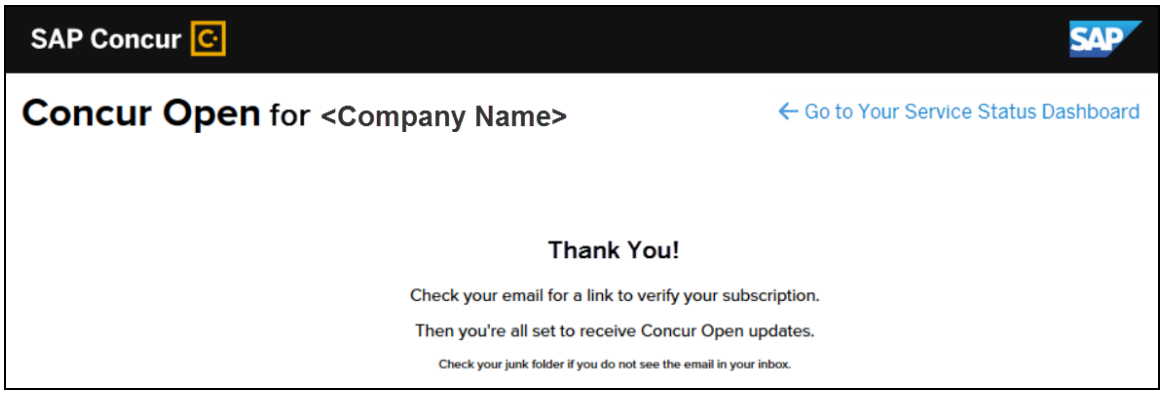


To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address. The user can enter only one email address. It can be their email address associated with their Concur profile, their personal email address, or any other email address.

The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

For those with subscriptions ***before*** the release of the new Personalized Concur Open, note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
  - Set the user's new subscription to match the company's services and data center
  - Notify the user of the change

  NOTE: Best practice – after the new view is available – is to sign in to the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user subscription will remain the same (not personalized).

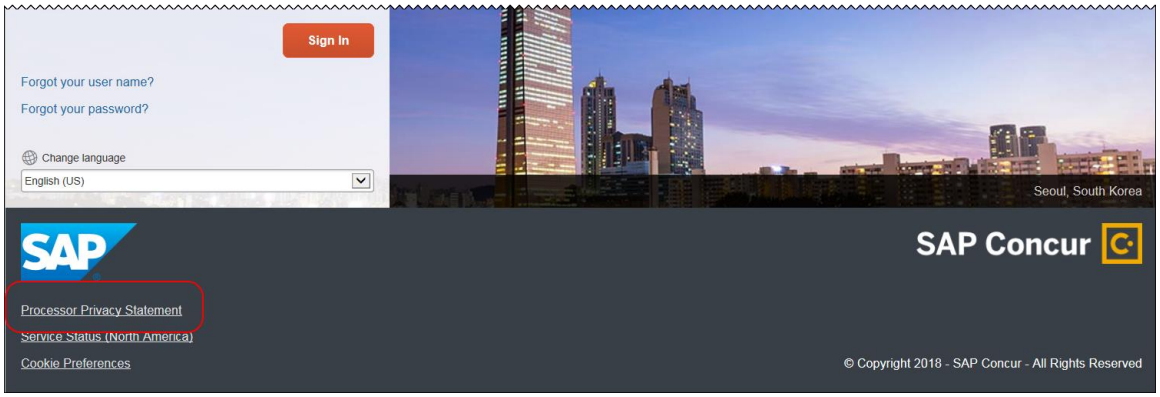
Configuration / Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Processor Privacy Statement Link in Online Help

Overview

The **Processor Privacy Statement** link is available in the SAP Concur footer.



However, not all pages in SAP Concur display the footer. In this case, the user can return to the Home page and click the **Processor Privacy Statement** link there.

Also, with this release, the **Processor Privacy Statement** link is available in online Help.

Configuration / Feature Activation

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

Expense Pay – Global

(Canada) Additional Card Program Now Supported for CAD

Overview

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

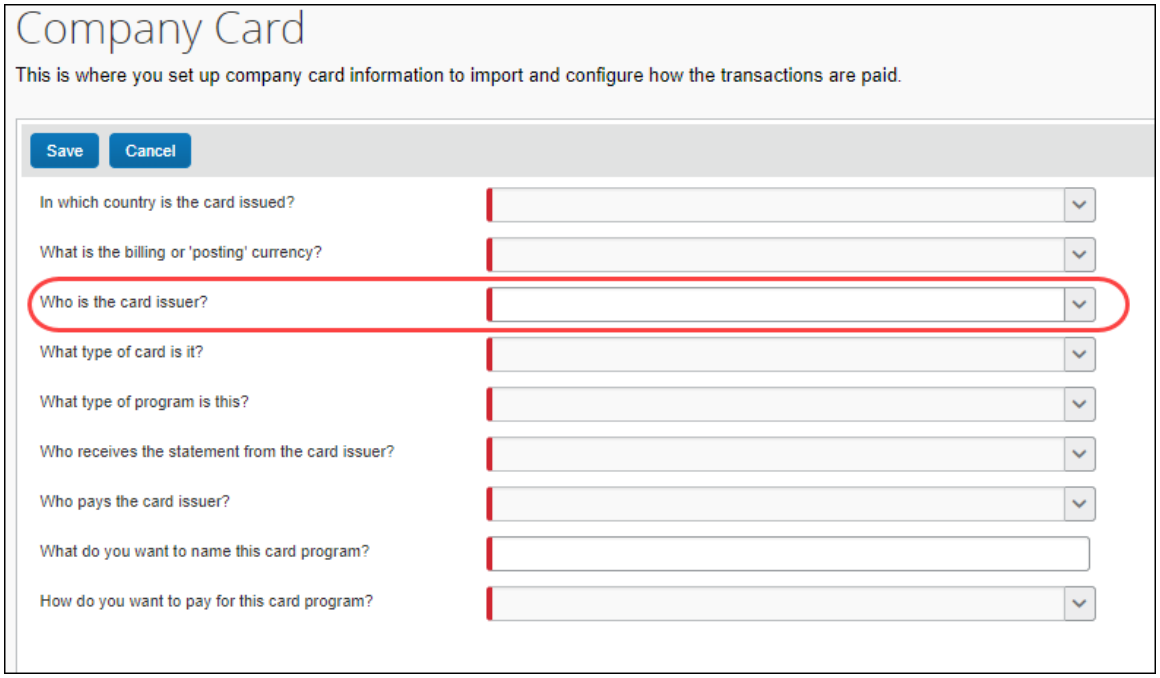
- JP Morgan Chase MasterCard CAD

BUSINESS PURPOSE / CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

These additional card programs are available to admins on the **Administration > Expense Settings > Connections > Credit Cards > New** page.



Configuration / Feature Activation

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

Next Generation (NextGen) Expense

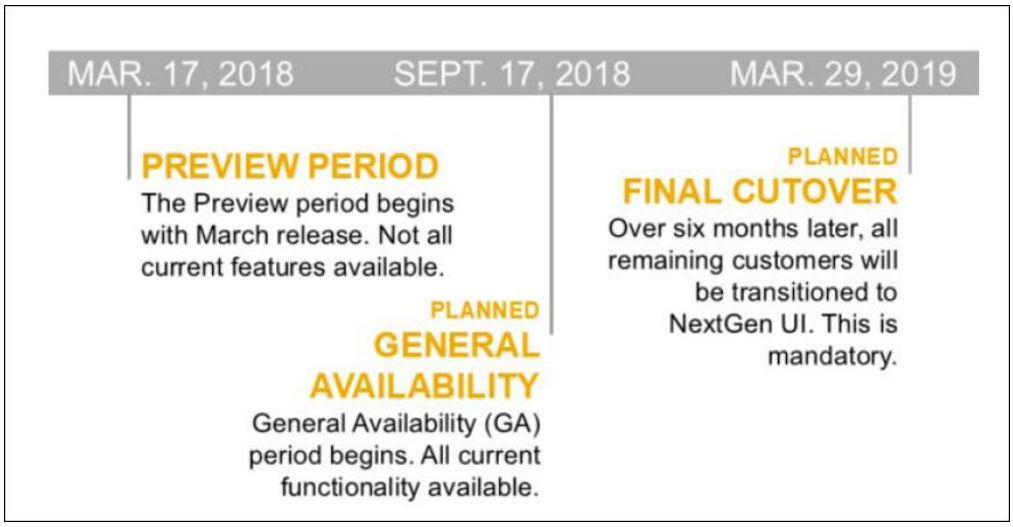
Ongoing New User Interface for Concur Expense End Users

Overview

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

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

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



BUSINESS PURPOSE / CLIENT BENEFIT

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

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

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

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

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

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

Product Settings

New Edit List Page in Cost Tracking

Overview

A new **Edit List** page has been added to the **Cost Tracking** page in Product Settings. The **Edit List** page replaces the **List Items** tab and provides better usability. The **Edit List** page retains the same functionality for adding, importing, editing, and deleting list items.

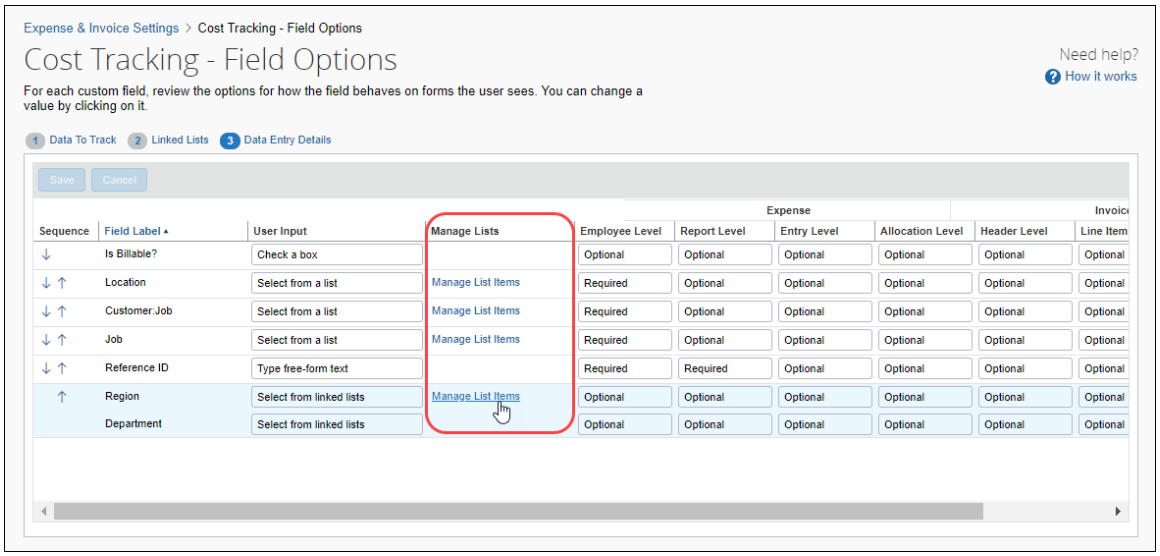
NOTE: The **Edit List** page displays as the **View List** page when list values are imported from QuickBooks for the QuickBooks Class, Customer, and Location fields.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves list item management by providing a better user experience.

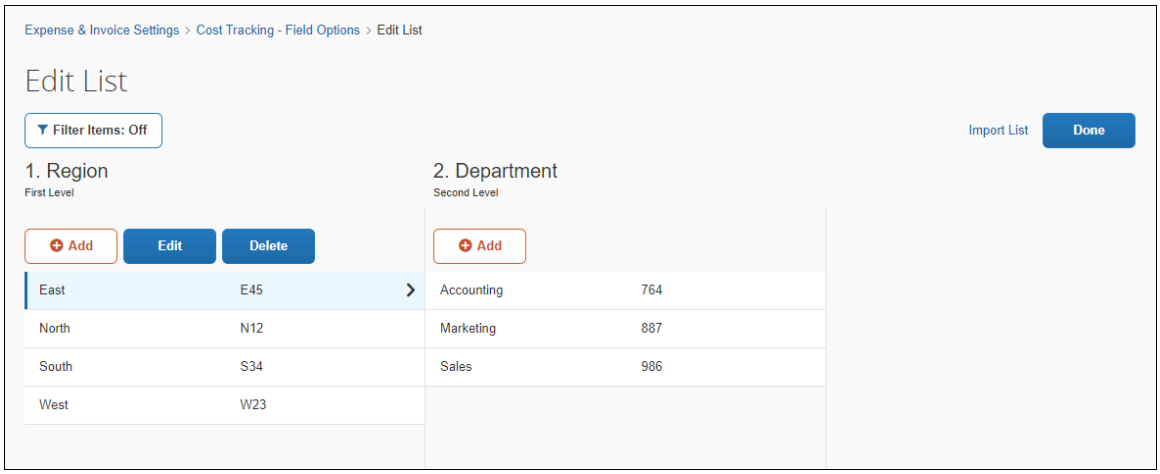
What the Admin Sees

On the **Cost Tracking – Field Options** page, a new **Manage Lists** column displays on the **Data Entry Details** tab. Click **Manage List Items** to access the **Edit List** page. The **Edit List** page appears.

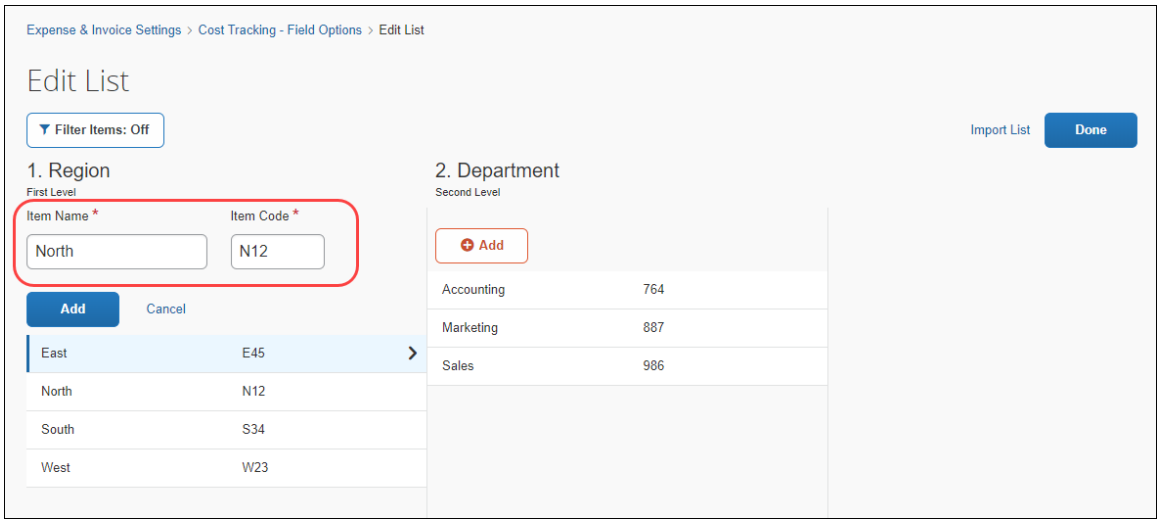


CONFIGURE LIST ITEMS

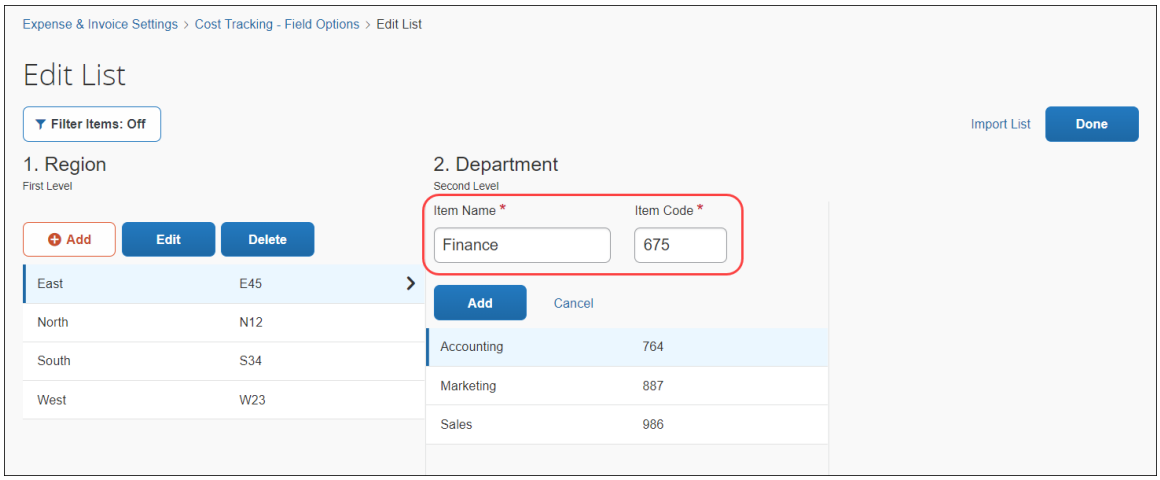
The **Edit List** page allows you to add, import, edit, and delete list items.



Click **Add** to display the **Item Name** and **Item Code** fields.

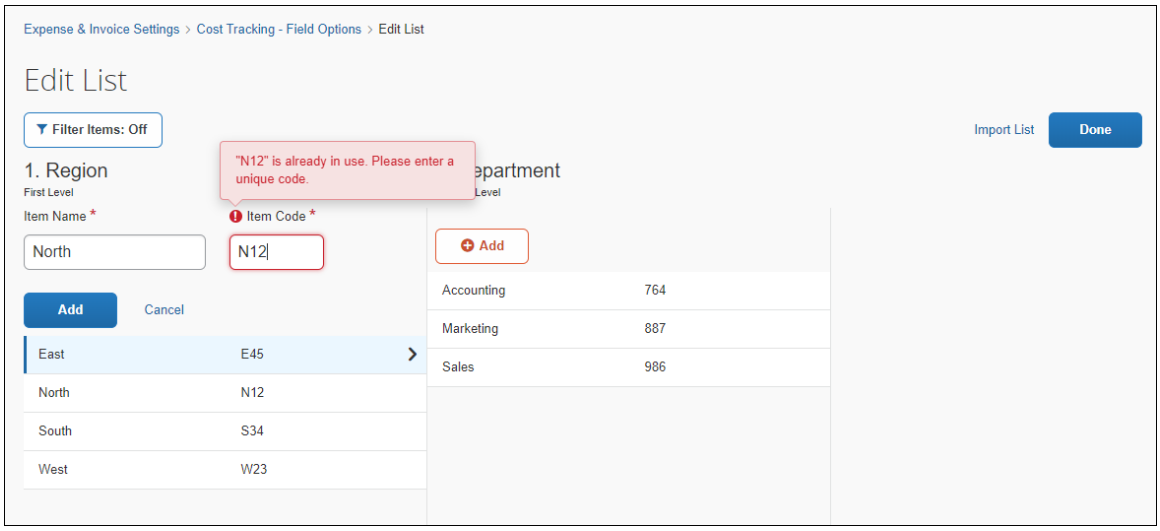


If you're adding an item to a sub-level list, such as Department (shown as the level two list in the picture), you must first select the parent item on the left to display the sub-level or multi-level list where you want to add an item. Next, click the **Add** button at the level where you want to add the list value.



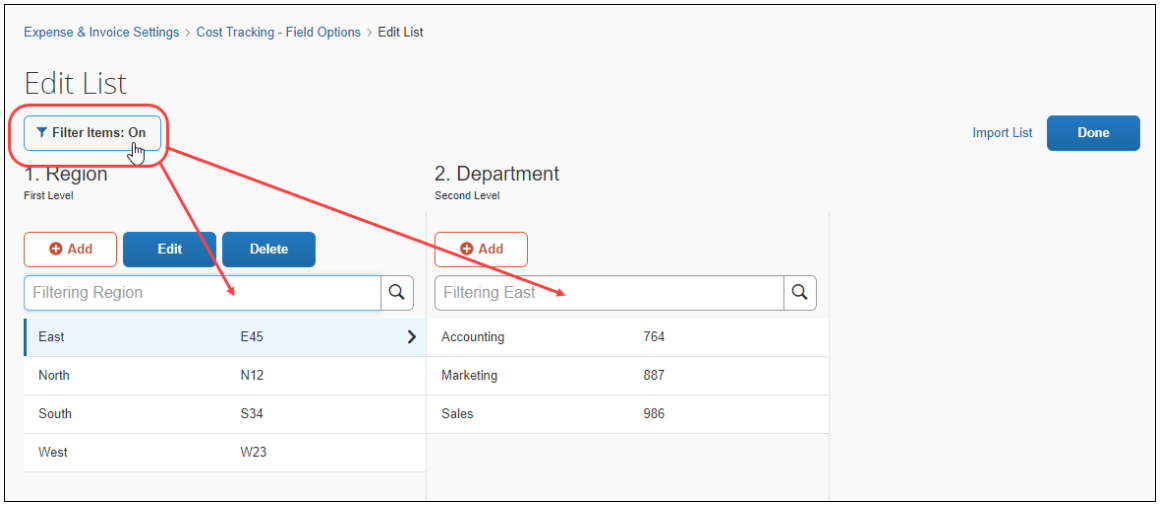
VALIDATION OF LIST ITEMS

The system displays a notification if an error or conflict occurs. For example, a message appears if an item name or code is already in use.



SEARCH LIST ITEMS

To search for a list item, click **Filter Items** to turn on search and display the search field.



Configuration / Feature Activation

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

For more information, refer to the *Shared: Cost Tracking Setup Guide*.

Value Added Tax (VAT)

(Canada) Reduce Ontario RITC Reclaim %

Overview

From July 1, 2018, the RITC tax reclaim rate percentages for the Canadian province of Ontario have changed in accordance with the planned phase-out of Recaptured Input Tax Credits.

BUSINESS PURPOSE / CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

From July 1, 2018, administrators will see the new RITC tax reclaim rate percentages on the **Tax Groups for Tax Authority: Canada – RITC - ON** page in Product Settings.

The **Taxation** page automatically displays the new rates; there are no additional configuration or activation steps.

Tax group reclaim rates will display as follows:

- Tax Group: Mileage tax group | Reclaim Rate: 0%
- Tax Group: RITC 100% tax group | Reclaim Rate: 0%
- Tax Group: RITC 50% tax group | Reclaim Rate: 0%

Configuration / Feature Activation

The **Tax Groups for Tax Authority** page automatically displays the new rates; there are no additional 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.

Admin

Planned Changes Expense Assistant Can Create Trip-based Expense Reports

Overview

Admins can now pre-configure Expense Assistant options.

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

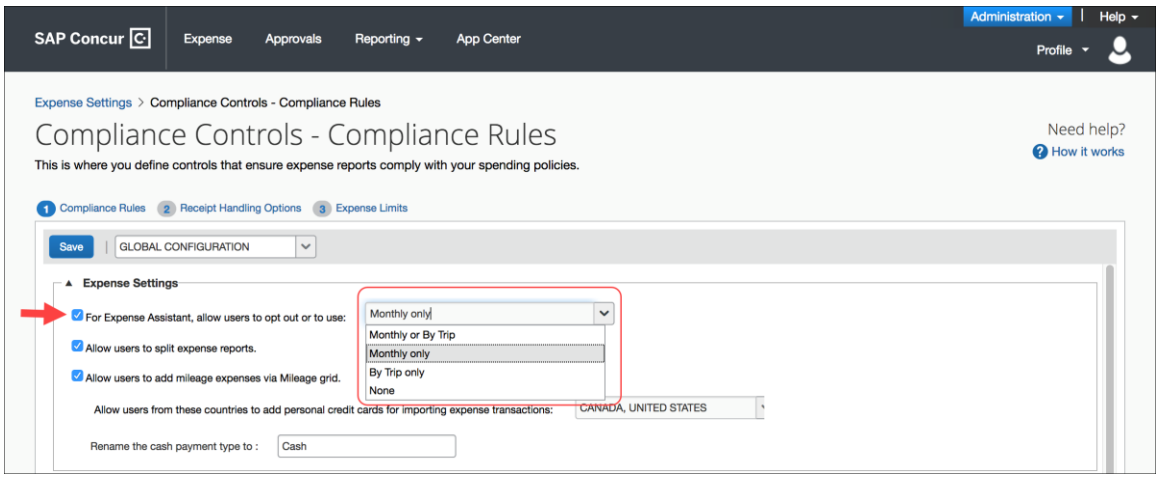
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Expense Settings > Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use** field's list will show the new choices.

With this field, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users, and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration remains unchanged.

For new clients, by default, **For Expense Assistant, allow users to opt out or to use** is enabled and *Monthly or By Trip* is selected from the list.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Expense Settings > Compliance Controls – Compliance Rules** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list.

Until the trip-based expense report functionality for Expense Assistant is completed in a future release, Expense Assistant will continue creating calendar-based expense reports for the users if you select the *Monthly or By Trip* or *Monthly* only options in the **For Expense Assistant, allow users to opt out or to use** field.

If you select the *By Trip only* or *None* options, Expense Assistant will be disabled for all your users and they will not see any Expense Assistant functionality.

For more information about Expense Assistant, refer to the *FAQ - Expense Assistant* available from the fact sheet landing page.

Plain Text File Transfer Protocol (FTP)

Planned Changes Support for Plain Text FTP to End on September 1st, 2018

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

⚠ **IMPORTANT:** SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing

commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

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

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

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

📖 For more information, please refer to the Client FAQ and the *File Transfer User Guide*.

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

Uploading Receipt Images

Planned Changes Support for Uploading HTML Ends September 2018

Overview

Users will no longer have the option to upload scanned images of receipts that are formatted as HTML files.

Users will continue to be able to upload receipt images that use the following file formats: PNG, JPG, JPEG, PDF, TIF, and TIFF.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will allow SAP Concur to devote more resources to features that are used by many or most of our clients.

Configuration / Feature Activation

This change will be automatically available; there will be no configuration or activation steps.

📖 For general information about uploading receipt images, refer to the *Concur's Imaging Service – Overview* Expense End User Help topic.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

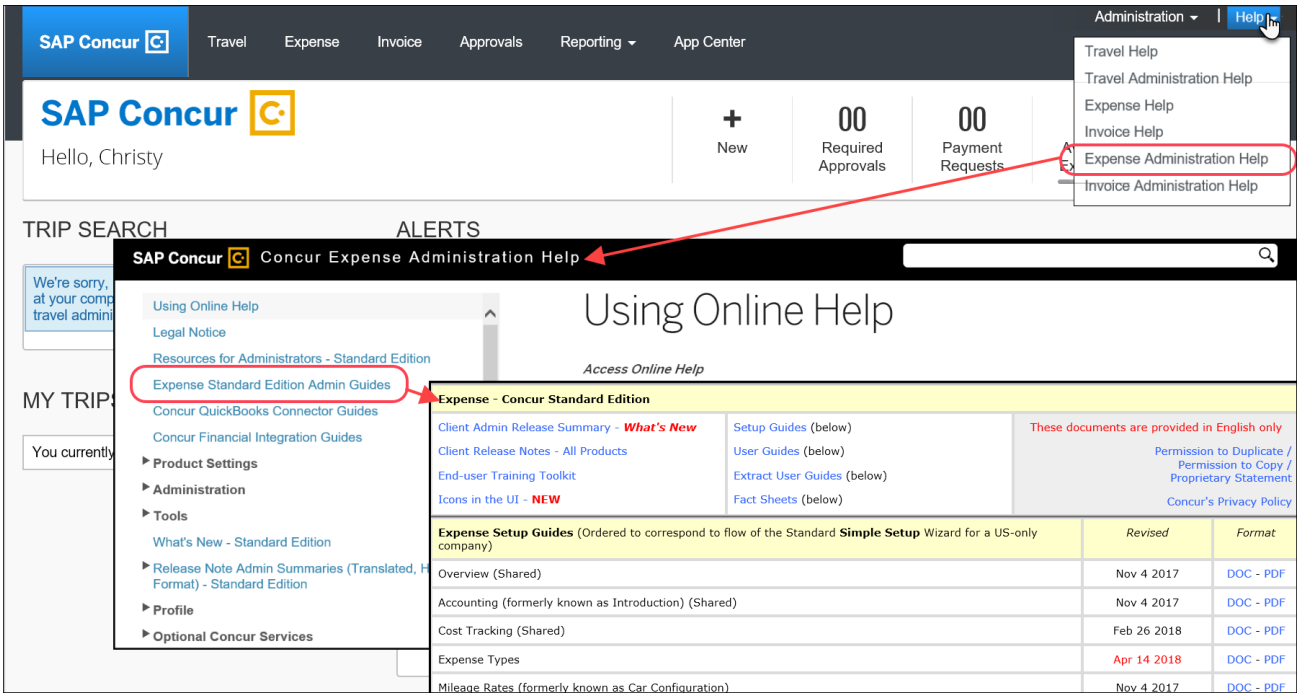
The list of non-affiliated subprocessors is available here: SAP Concur list of Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

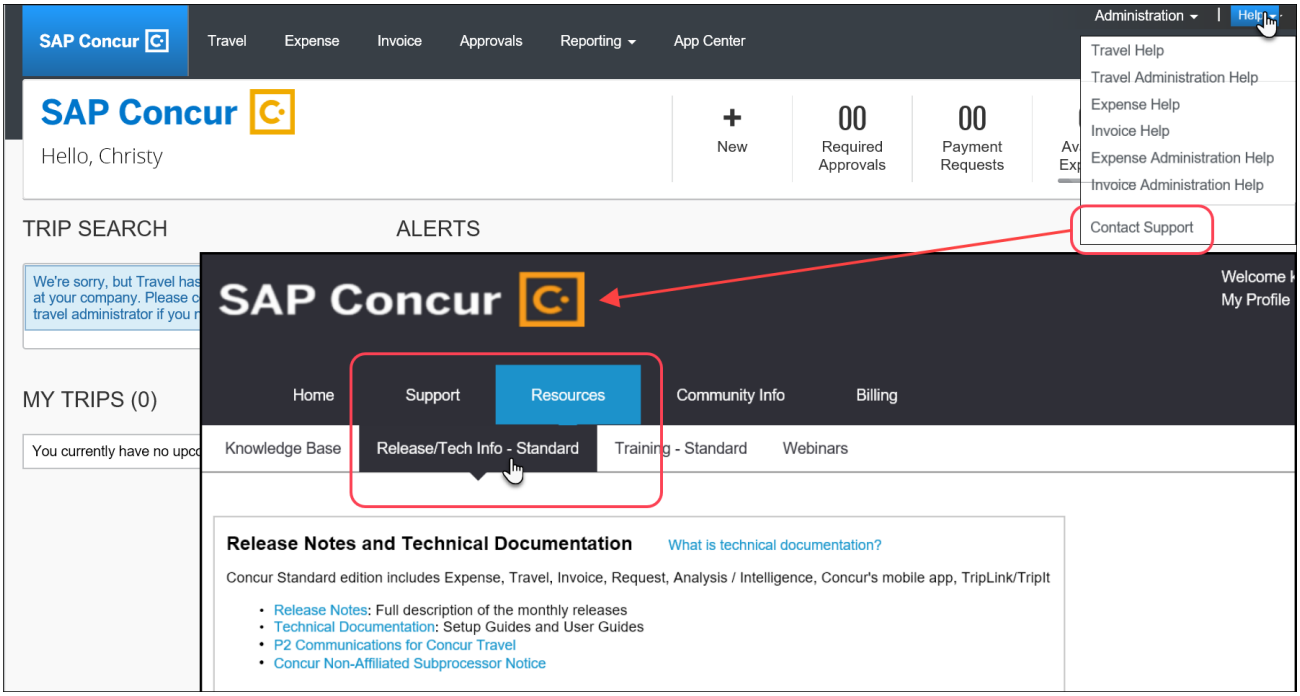
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: August 18, 2018 Initial Post: Friday, August 17, 2:00 PM PT	SAP Concur Client ***FINAL***

Contents

Legal Disclaimer

Release Notes

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Admin Sees

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

What the User Sees

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

Configuration / Feature Activation

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

Next Generation (NextGen) Expense

Ongoing New User Interface for Concur Expense End Users

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

SAP Concur is dedicated to the consistent improvement of our products, not only the features they provide, but also the experience of using those features. How users interact with technology changes over time, along with needs and expectations. We

are constantly listening to our customers and soliciting feedback on how we can improve the user experience.

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

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense:** A***ll customers will be required to move to NextGen Expense***. This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

  Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

Plain Text File Transfer Protocol

Support for Plain Text FTP to End on September 1st, 2018

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur.

⚠ **IMPORTANT:** SAP Concur has decided to provide clients an extension until September 1st, 2018, after which this functionality will be fully retired and no longer available for use. ***There will be no extensions beyond this date.***

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

What This Means – The Client Experience

After September 1st, 2018, uploads of file types such as Employee, List, Attendee and other Import files as well as downloads of SAE and other Extract files that use Plain Text FTP will not be accepted via SAP Concur's Filemover system. This will significantly impact client usage of SAP Concur products such as Concur Travel, Concur Expense, and Concur Invoice, as well as integration activities to customers' financial systems. ***There will be no exceptions beyond September 1st, 2018.***

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

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

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

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

📖 For more information, please refer to the Client FAQ and the *File Transfer User Guide*.

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

Quickbooks

Prevent Connection to or Disconnection From QuickBooks When Reports or Invoices are In-Flight

Overview

SAP Concur has updated the connection/disconnection process for QuickBooks to prevent clients from either connecting or disconnecting the integration when they have expense reports or invoices in-flight. The in-flight reports and invoices may have posting issues when the integration is disabled or re-enabled.

This change impacts all QuickBooks integrations:

- The QuickBooks Connector, using QuickBooks Online or QuickBooks Desktop
- The Concur Financial Integration with QuickBooks, using QuickBooks Online or QuickBooks Desktop (currently in Early Access)

SAP Concur has identified some situations where it is necessary to disconnect the integration despite in-flight reports or invoices. In those cases, clients should contact Concur Client Support for assistance.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature prevents posting failures at companies that need to either connect or disconnect the integration.

Configuration / Feature Activation

This change is automatically on; no additional configuration or feature activation is 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.

Admin

Planned Changes Expense Assistant Can Create Trip-based Expense Reports

Overview

Admins can now pre-configure Expense Assistant options.

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

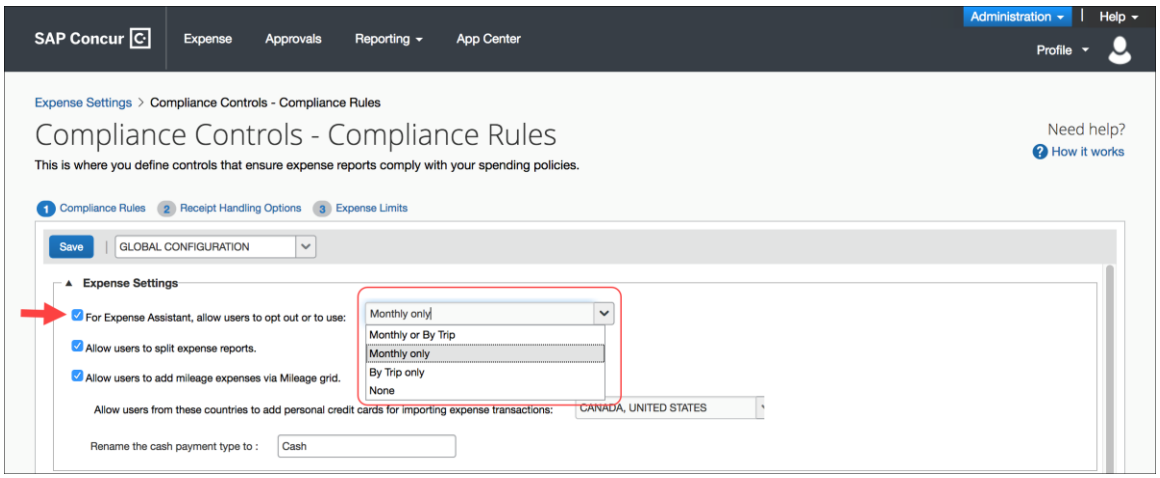
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Expense Settings > Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use** field's list will show the new choices.

With this field, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users, and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration remains unchanged.

For new clients, by default, **For Expense Assistant, allow users to opt out or to use** is enabled and *Monthly or By Trip* is selected from the list.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Expense Settings > Compliance Controls – Compliance Rules** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list.

Until the trip-based expense report functionality for Expense Assistant is completed in a future release, Expense Assistant will continue creating calendar-based expense reports for the users if you select the *Monthly or By Trip* or *Monthly* only options in the **For Expense Assistant, allow users to opt out or to use** field.

If you select the *By Trip only* or *None* options, Expense Assistant will be disabled for all your users and they will not see any Expense Assistant functionality.

For more information about Expense Assistant, refer to the *FAQ - Expense Assistant* available from the fact sheet landing page.

Planned Changes Personalized Concur Open

Overview

Concur Open is the SAP Concur service status dashboard, which displays known and widespread outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

In a future release, there will be new functionality added to Concur Open. Users can continue to access Concur Open and view Concur service availability; no functionality will be removed. However, with the release, SAP Concur users will be able to log in to Concur Open and:

- View service status for the services and the data center that are *specific to their company*
- Access subscription options for updates about the incidents that impact the services *specific to their company*

- View service history for the past two years as well as detailed root cause analysis information and the actions taken by SAP Concur for specific incidents

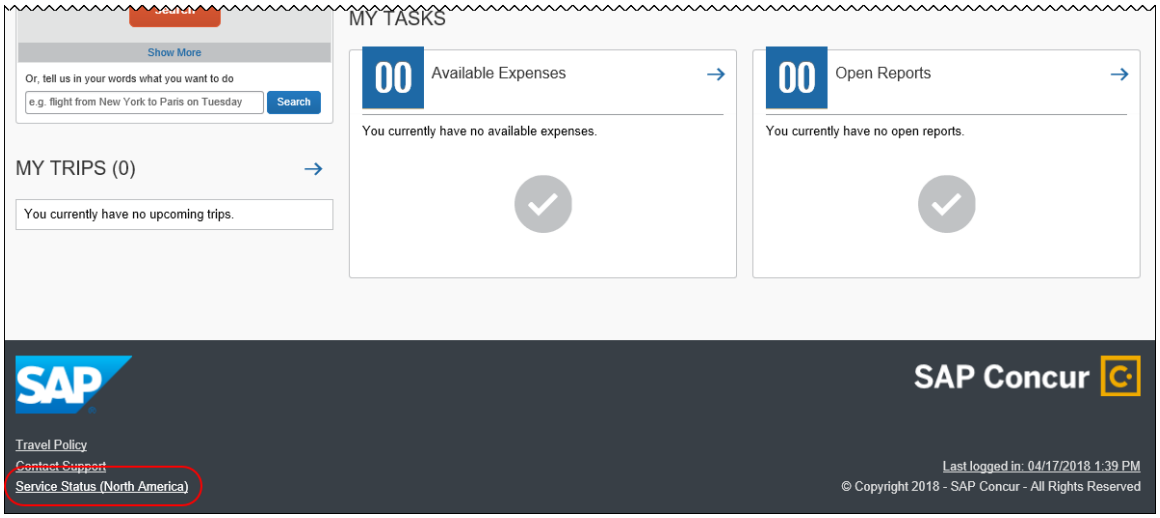
BUSINESS PURPOSE / CLIENT BENEFIT

Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding the new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

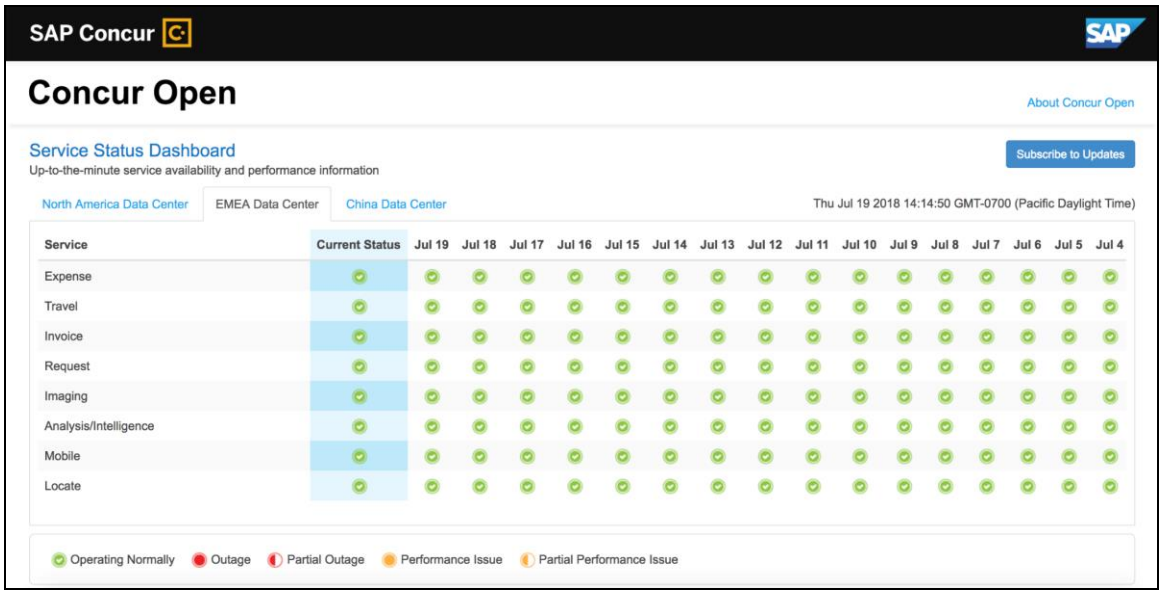
Users can access Concur Open two ways:

- Enter the public site directly using https://open.concur.com
  – or –
- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen

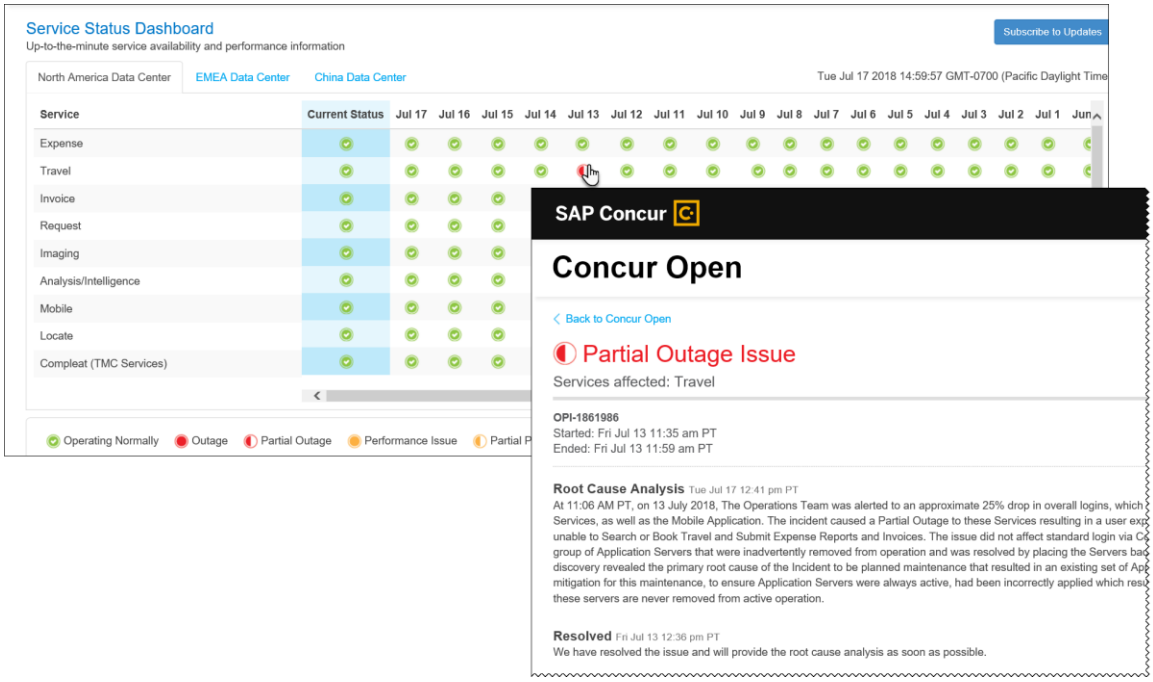


Concur Open appears.

What the User Sees – Current View



Currently, the user sees all data center tabs, the service activity (up to the previous 20 days), and the "service" legend (bottom of the page).



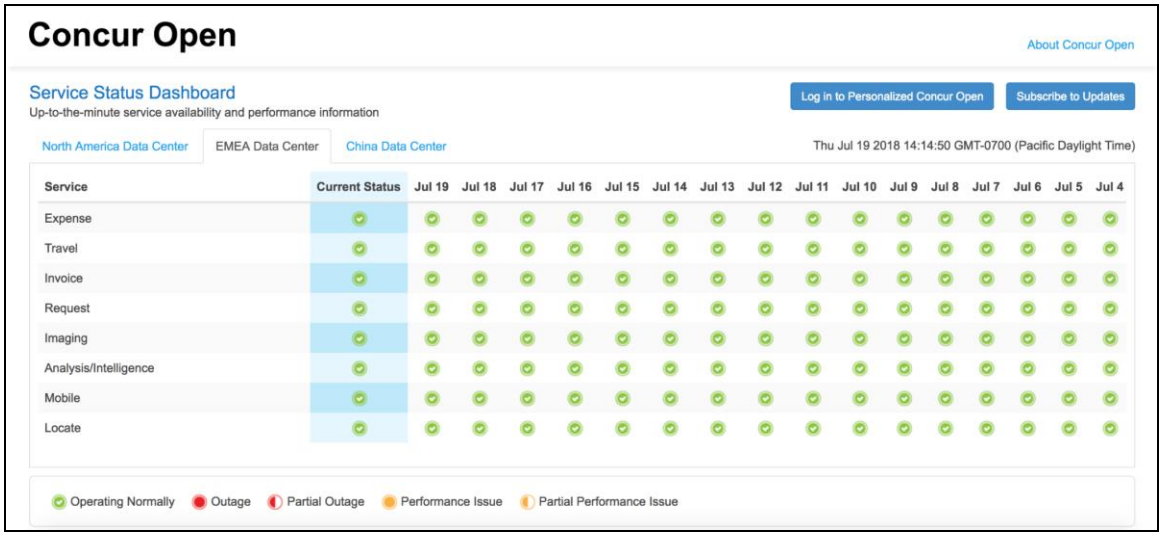
The user can click an icon to review information about service activity.

The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New View and Process

The user will access Concur Open the same way they do now – either via the public site (open.concur.com) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.



On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button – just like they currently do. In fact, that will not change – anyone can access the public version (open.concur.com) and anyone can request notifications.

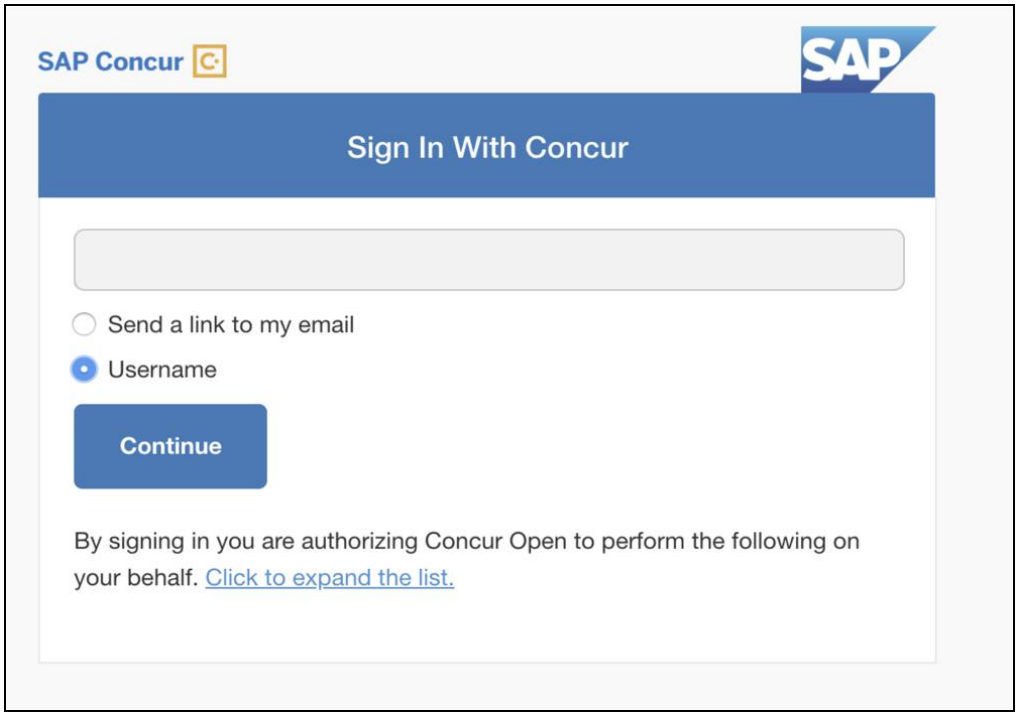
With the release of Personalized Concur Open, the main change is that the **Log in to Personalized Concur Open** button also appears on the main page. Whether the user accesses Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

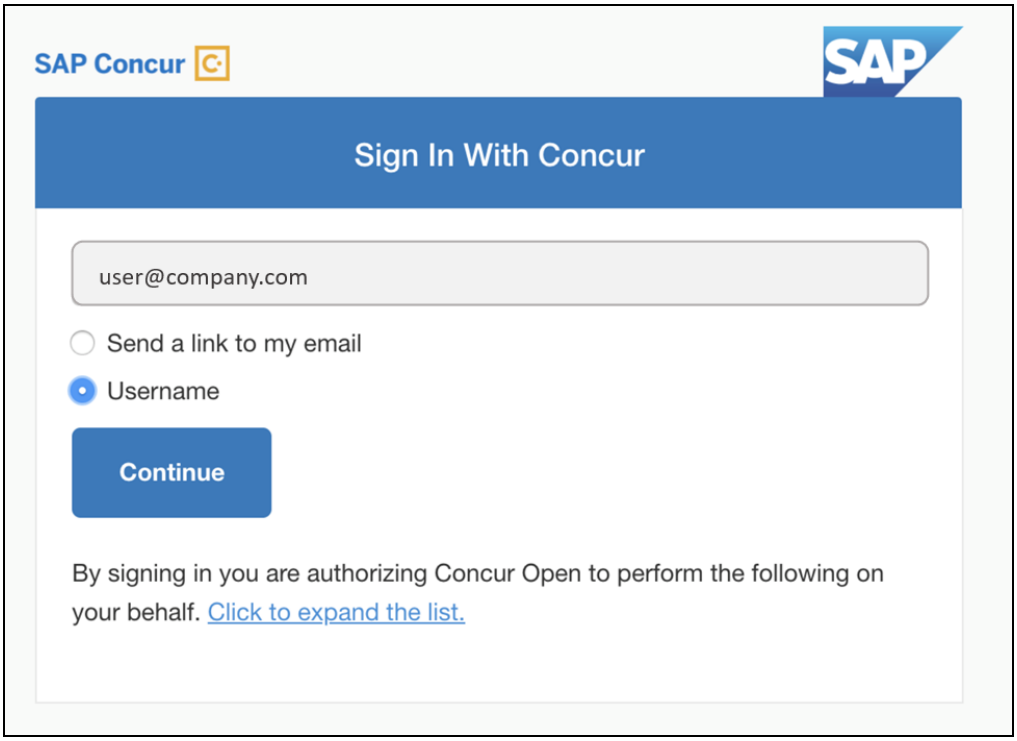
- For customers who do not use SSO, users sign in with their SAP Concur username and password.
- For customers who do use SSO, users can access the personalized view using their email address (described below).

On the main page, the user clicks the **Log in to Personalized Concur Open** button. The **Sign In With Concur** page appears.



Then, depending on the customer's implementation of SAP Concur:

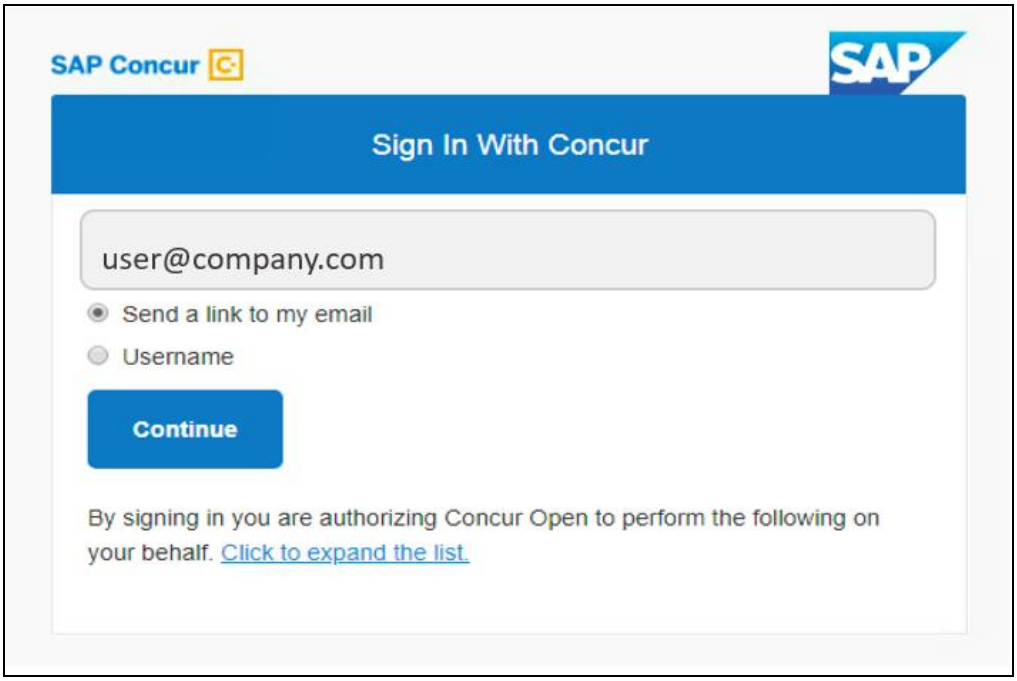
- **Username and password:** If the user signs in to SAP Concur using username and password:



Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**. This page appears.

The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:

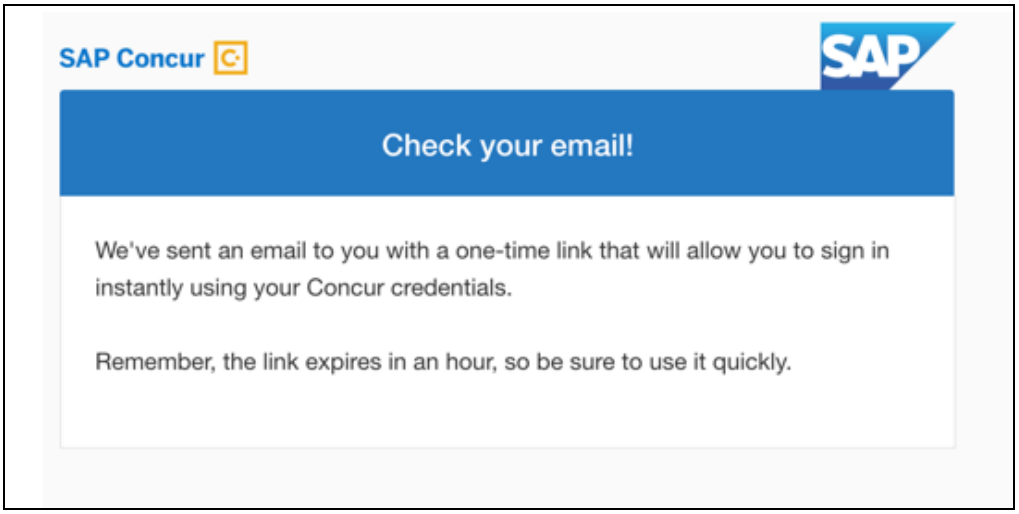


Then, on this page, the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.

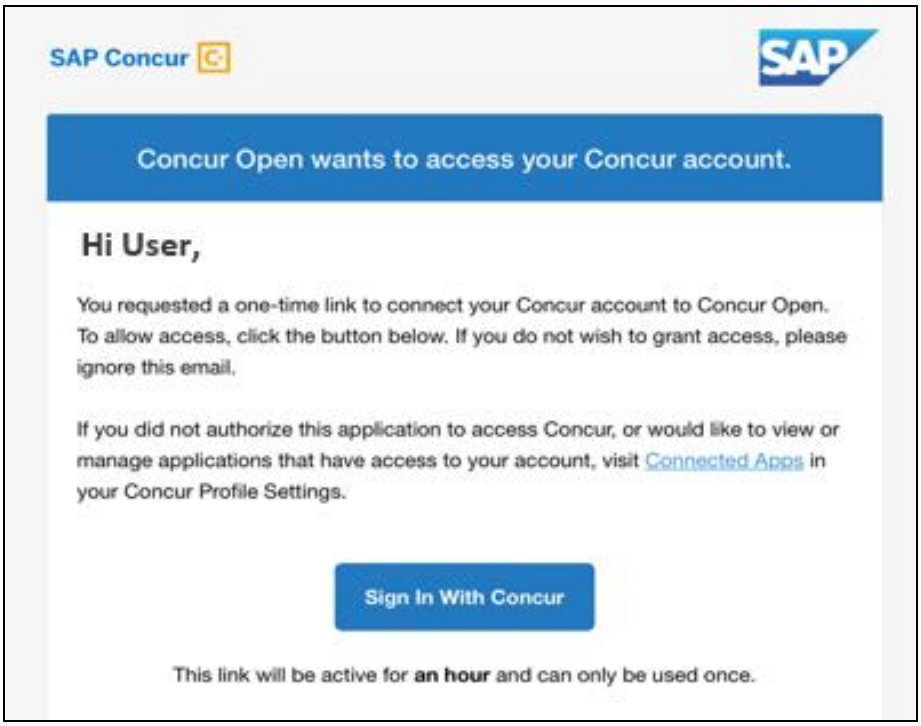
SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

Refer to *More About Email Addresses in Profile* for more detail.

This message appears:



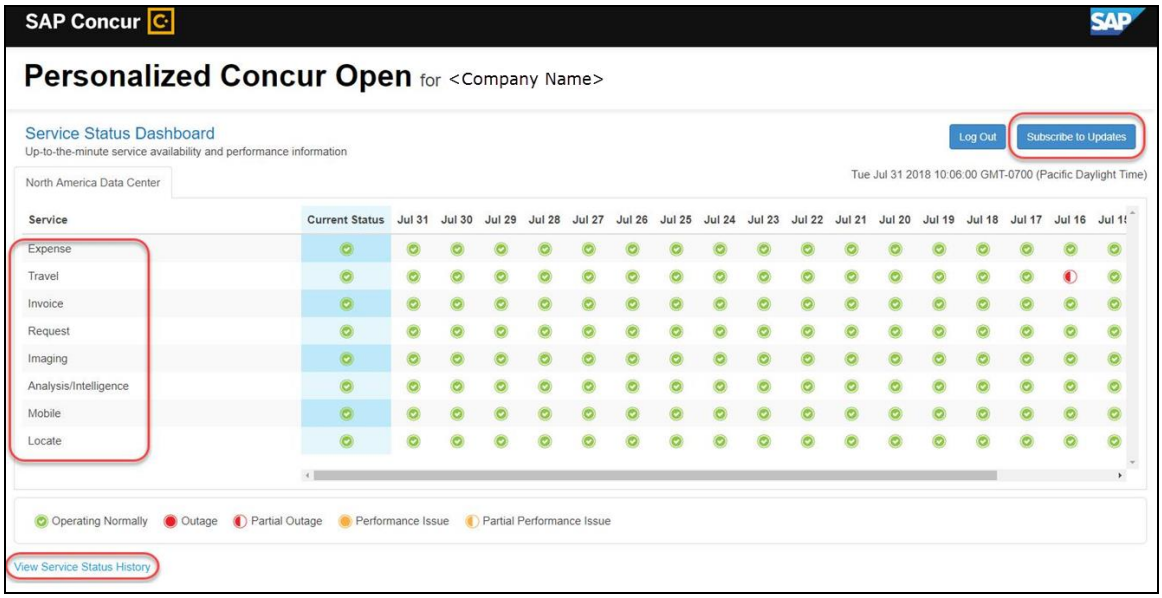
An email similar to this is sent to the email address.



The user clicks **Sign In With Concur**. The user is then directed to the personalized view.

NOTE: The ***one-time*** link is active for ***one hour***.

Once signed in, the personalized **Service Status Dashboard** page appears.

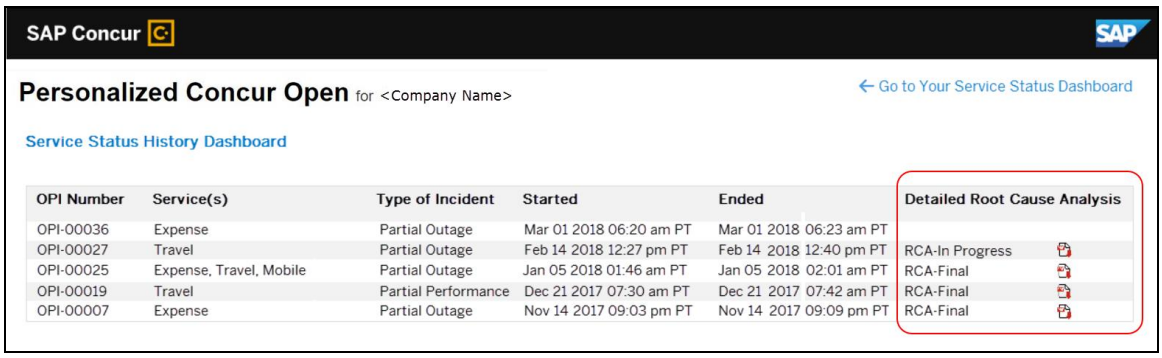


On this page, the user can:

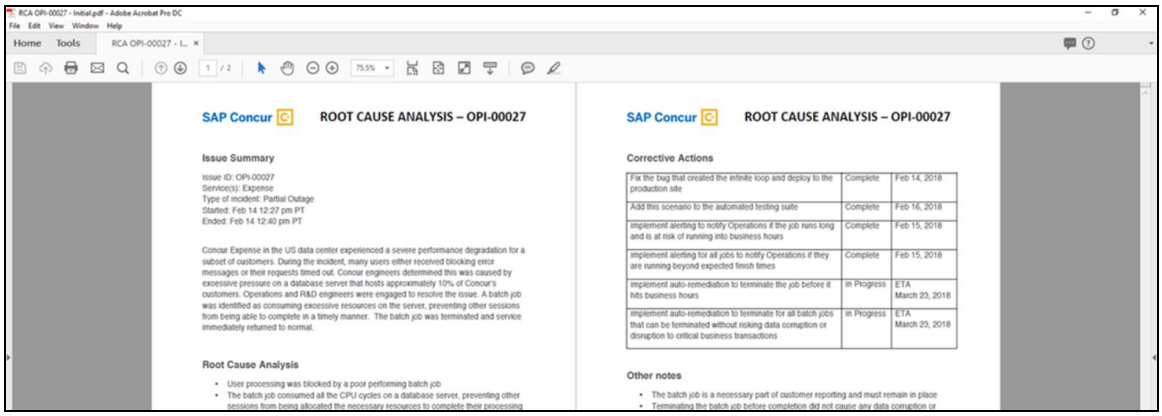
- View:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company.
- Subscribe to updates

View Service History and Incident Analysis

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for specific incidents.

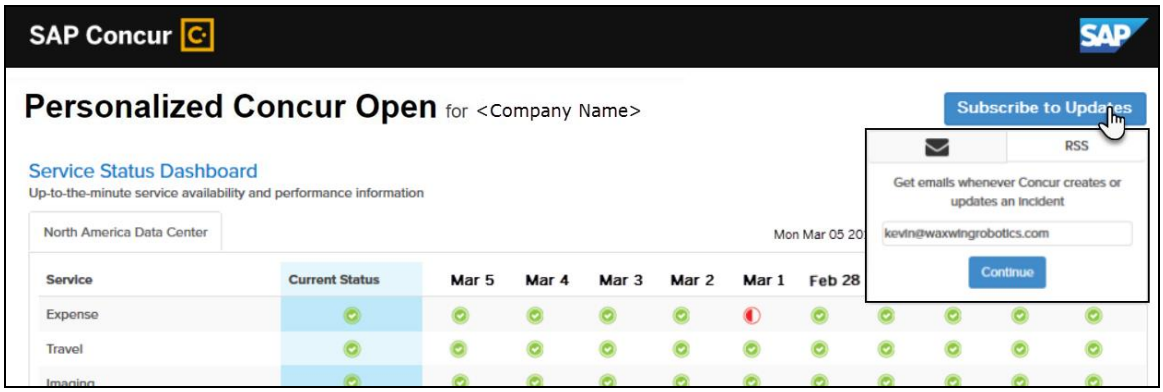


NOTE: Be aware that the root cause PDFs will be available starting around the date that the personalized view becomes available. Though service information (start/stop dates and times, type of incident, etc.) will be provided for the activity of the past two years, the PDFs will not; they will be provided on a *go-forward* basis.

The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

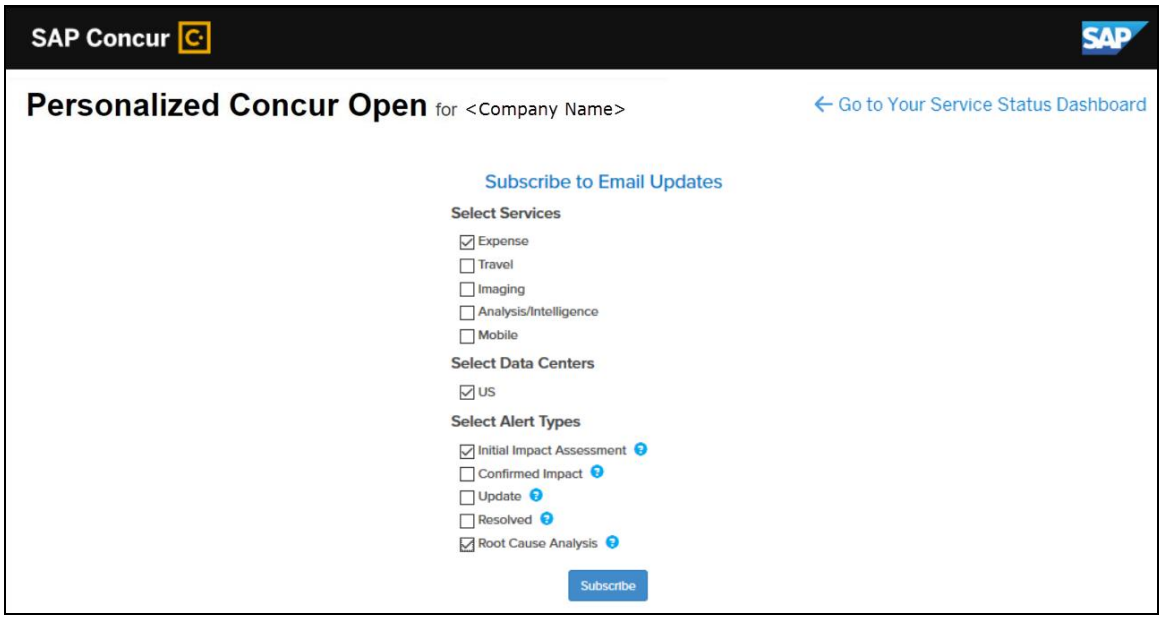
SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.

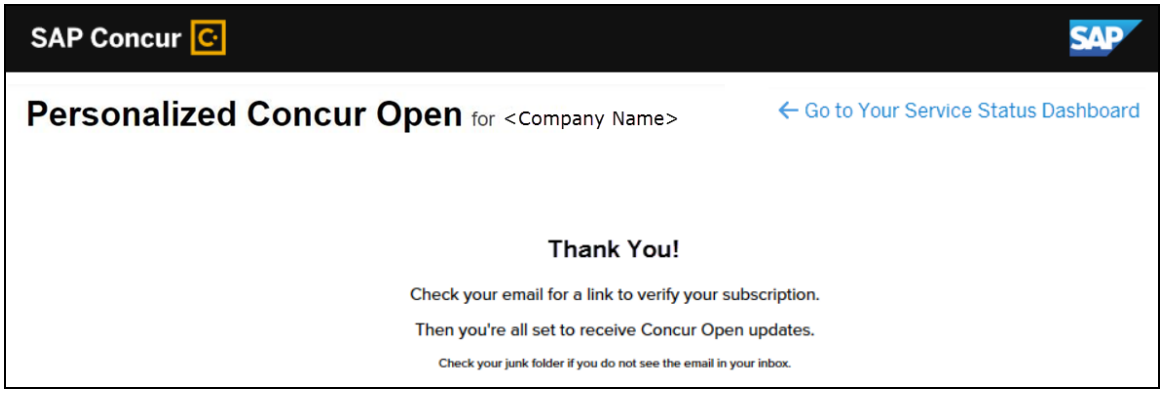


To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.

The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



User Remains Signed In

The user automatically remains signed in for seven days. In that seven-day period, whether the user enters directly (using https://open.concur.com) or they click **Service Status** in the lower-left corner of the SAP Concur screen, they are directed to the generic Concur Open page. When they click **Log in to Personalized Concur Open**, users bypass the login page and go directly to the **Personalized Concur Open** page.

If, during the seven-day period, the user wants to log out, they click **Log Out** on the **Service Status Dashboard** page.

More About Email Addresses in Profile

As described above, an SSO user must access the personalized view by entering their email address on the **Sign In With Concur** page and then clicking **Send a link to my email**.

Note the following:

- The email address that the user enters:
  - Must match the email address in the **Email 1** field in their SAP Concur profile; Email 1 must be "verified"
  - Must be unique to that user; it cannot be shared with multiple people or logins in their company
- If an employee no longer has access to SAP Concur (for example, leaves the company), that employee can no longer access the personalized view. Remember, in order to access the personalized view, they must have a Concur login or an email address in Profile. An inactive user or terminated employee has neither of those things.

Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

For those with subscriptions ***before*** the release of the new Personalized Concur Open, note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
  - Set the user's new subscription to match the company's services and data center in Personalized Concur Open
  - Notify the user of the change

  NOTE: Best practice – after the new view is available – is to sign in to the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user's subscription will be removed from Concur Open in 30 days. These customers will be notified of this change by email.

Configuration / Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Uploading Receipt Images

Planned Changes Support for Uploading HTML Ends September 15th, 2018

Overview

Users will no longer have the option to upload scanned images of receipts that are formatted as HTML files.

Users will continue to be able to upload receipt images that use the following file formats: PNG, JPG, JPEG, PDF, TIF, and TIFF.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will close a security gap and allow SAP Concur to devote more resources to features that are used by many or most of our clients.

Configuration / Feature Activation

This change will be automatically available; there will be no configuration or activation steps.

📖 For general information about uploading receipt images, refer to the *Concur's Imaging Service – Overview* Expense End User Help topic.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

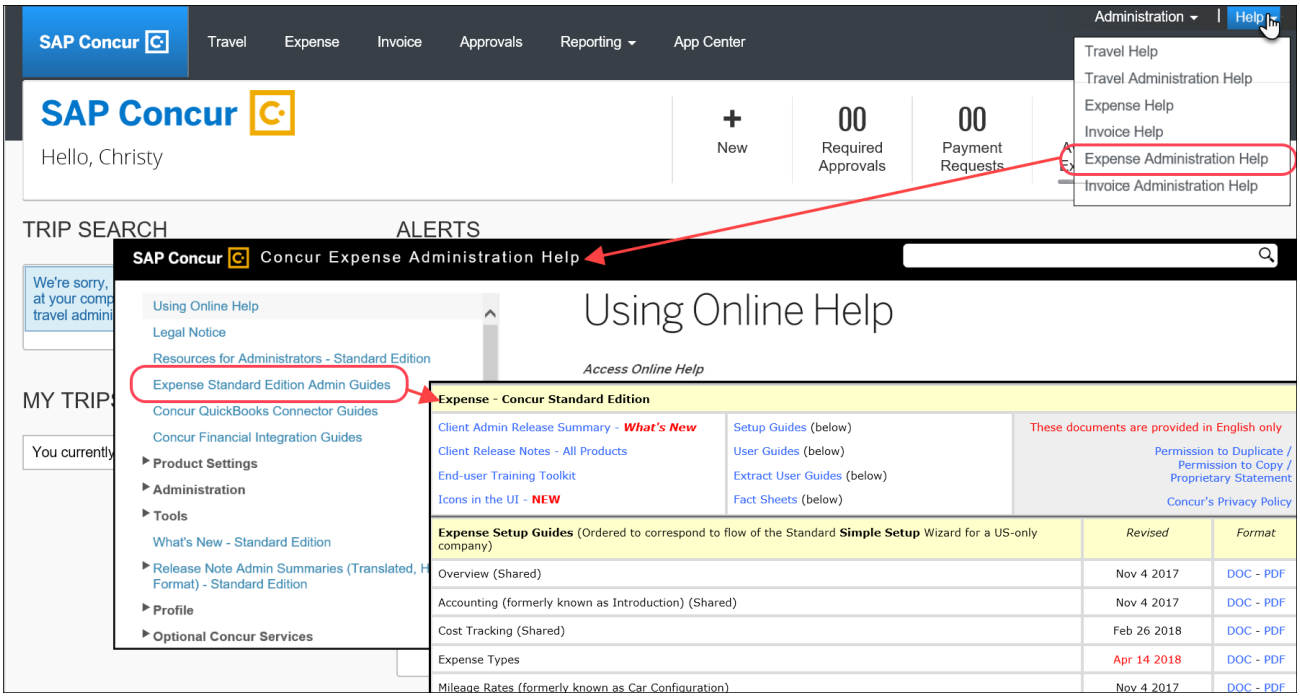
The list of non-affiliated subprocessors is available here: SAP Concur list of Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

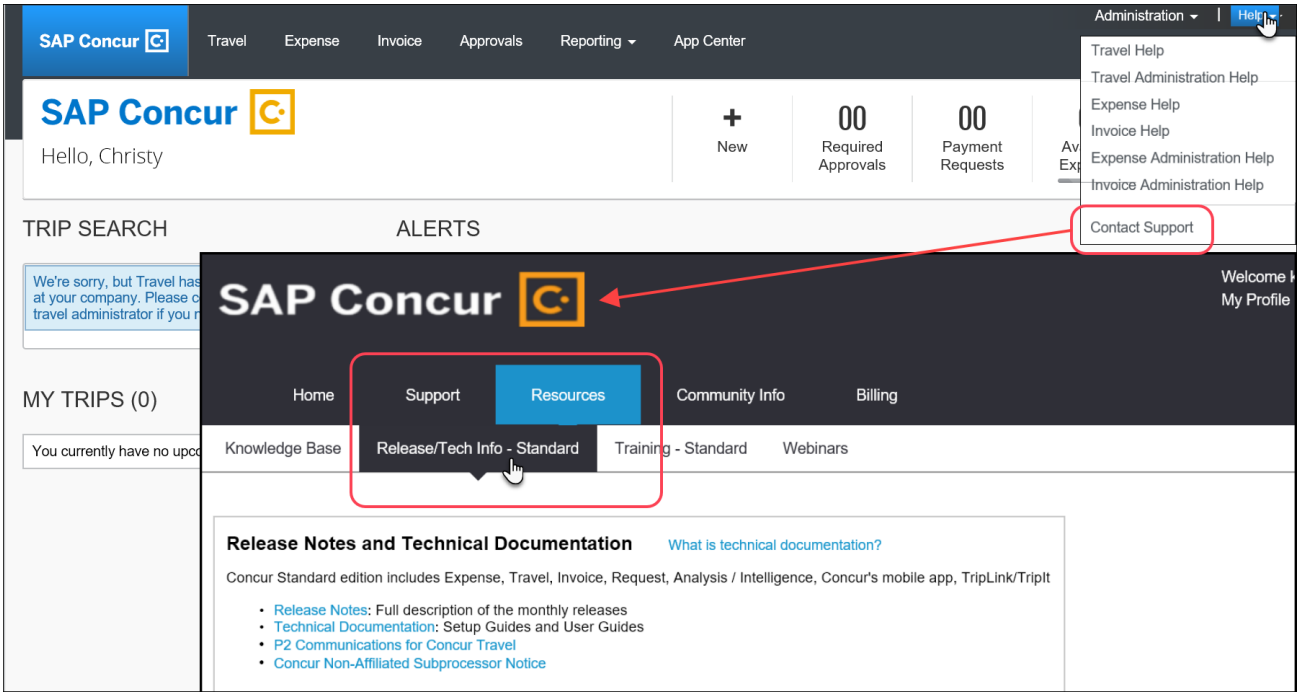
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: September 22, 2018 Initial Post: Friday, September 21, 9:00 AM PT	SAP Concur Client ***FINAL***

Contents

Legal Disclaimer

Release Notes

Admin

Personalized Concur Open

Overview

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Personalized Concur Open became available on September 11.

With the release, there will be new functionality added to Concur Open. SAP Concur users will be able to log in to a personalized view of Concur Open and:

- View service status for the services and the data center that are *specific to their company*
- Access subscription options for updates about the incidents that impact the services *specific to their company*
- View service history for the past two years as well as detailed root cause analysis information and the actions taken by SAP Concur for specific incidents

NOTE: Personalized Concur Open will be available ***in addition to*** Concur Open. Users can continue to access Concur Open and view service availability.

BUSINESS PURPOSE / CLIENT BENEFIT

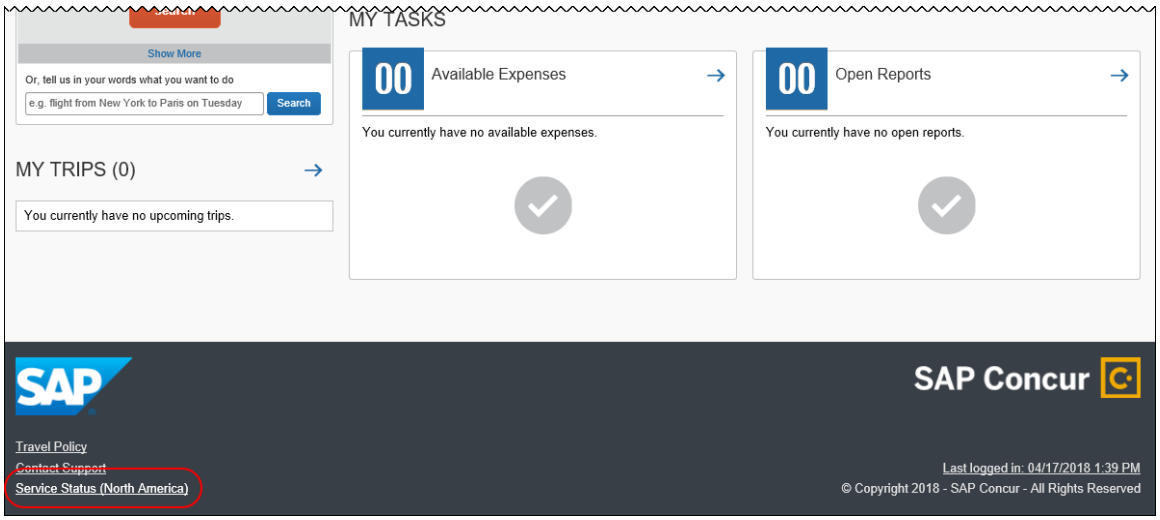
Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding the new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

Users can access Concur Open two ways:

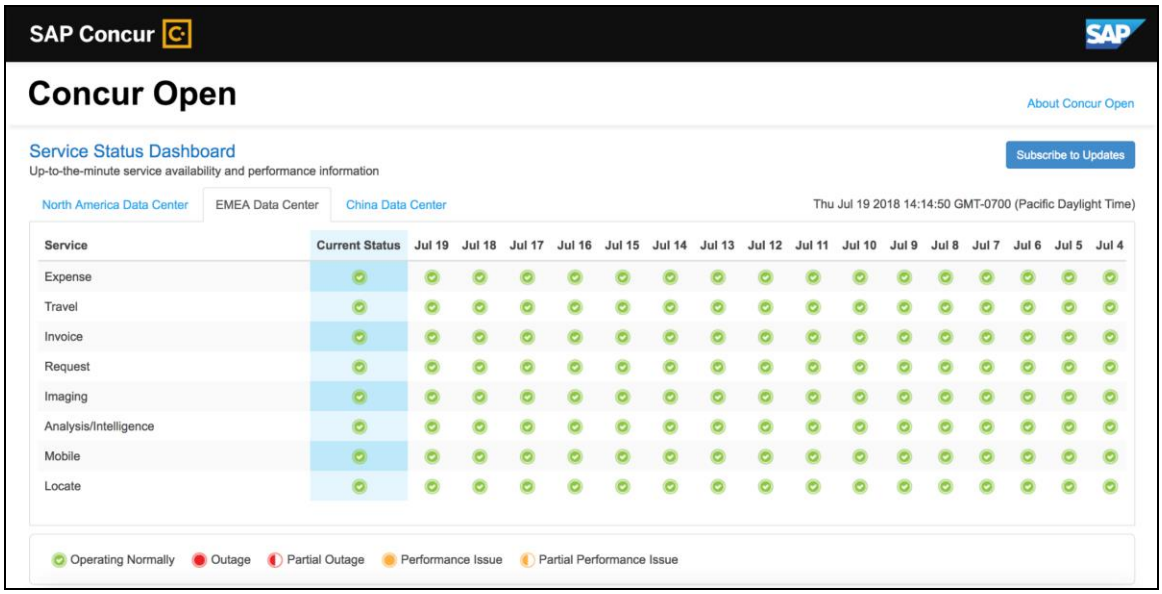
- Enter the public site directly using https://open.concur.com
  – or –

- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



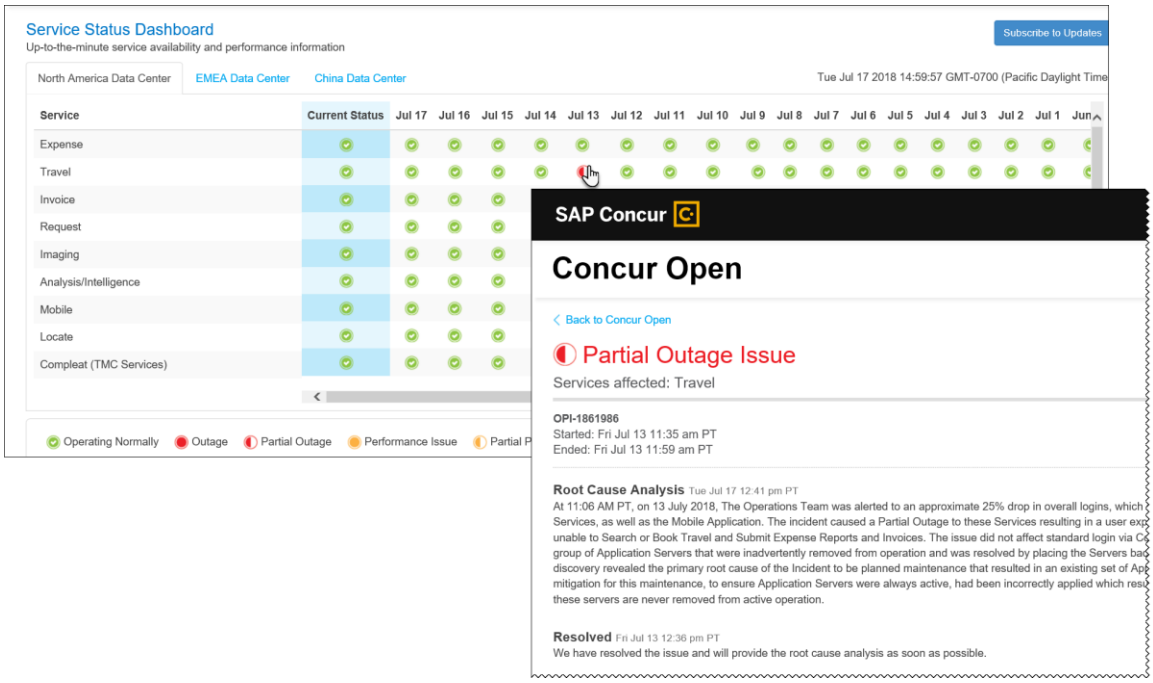
Concur Open appears.

What the User Sees – Current View, Concur Open



In Concur Open, the user sees all data center tabs, the service activity (up to the previous 20 days), and the "service" legend (bottom of the page).

The user can click an icon to review information about service activity.

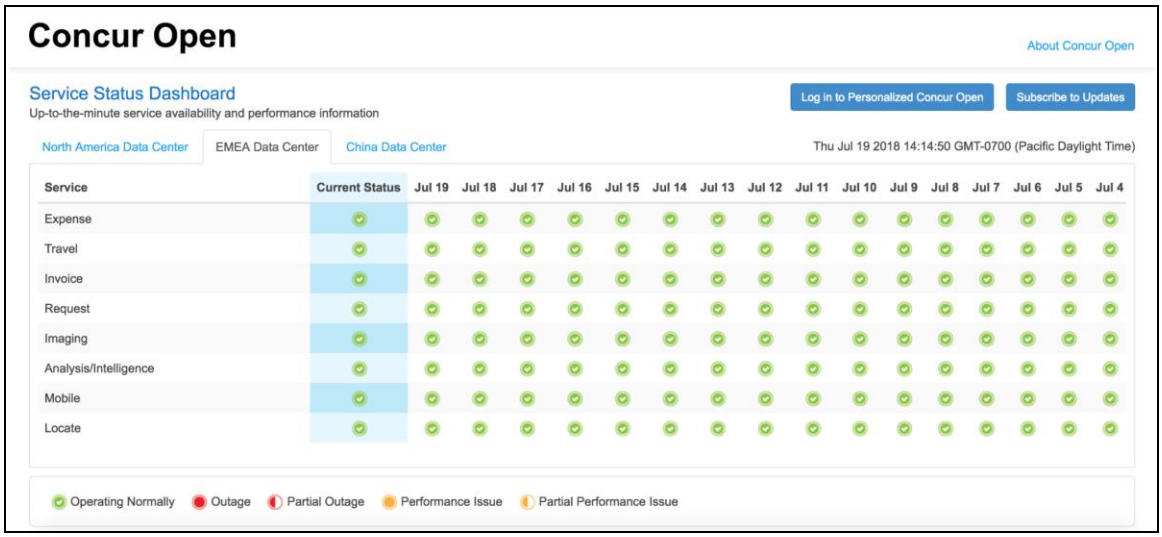


The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New Personalized View and Process

The user will access Concur Open the same way they do now – either via the public site (https://open.concur.com) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.



On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button – just like they currently do.

With the release of Personalized Concur Open, the main change is that the **Log in to Personalized Concur Open** button also appears on the main page. Whether the user accesses Open via the public site (https://open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

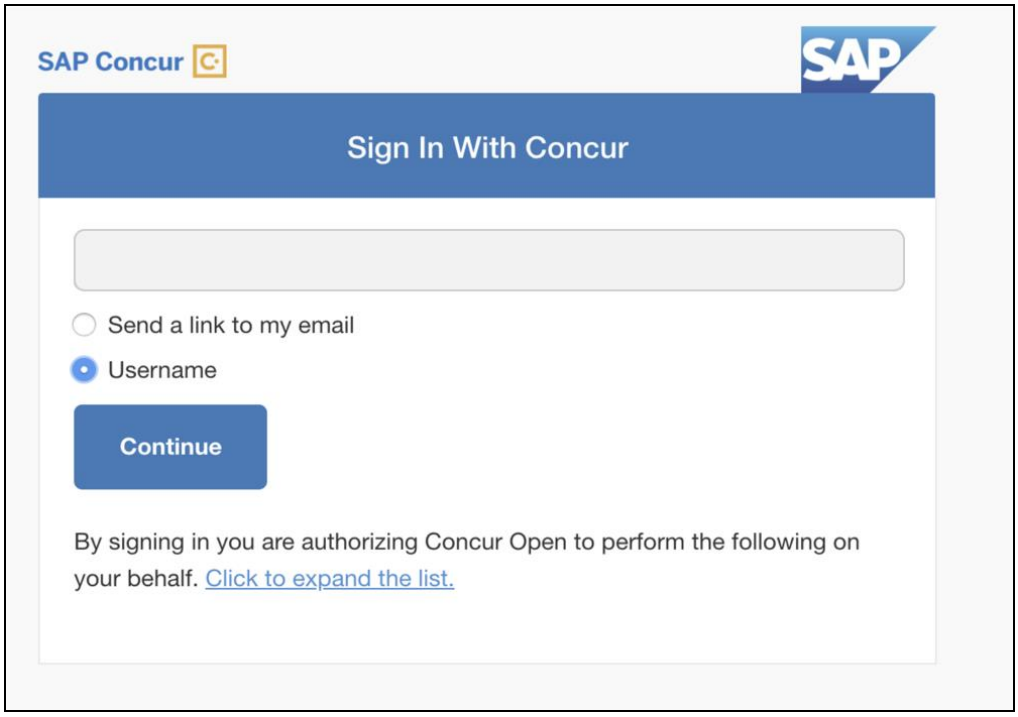
SIGN IN TO THE PERSONALIZED VIEW

NOTE: Initially, please use Internet Explorer, Chrome, or Firefox. Safari will be available later.

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

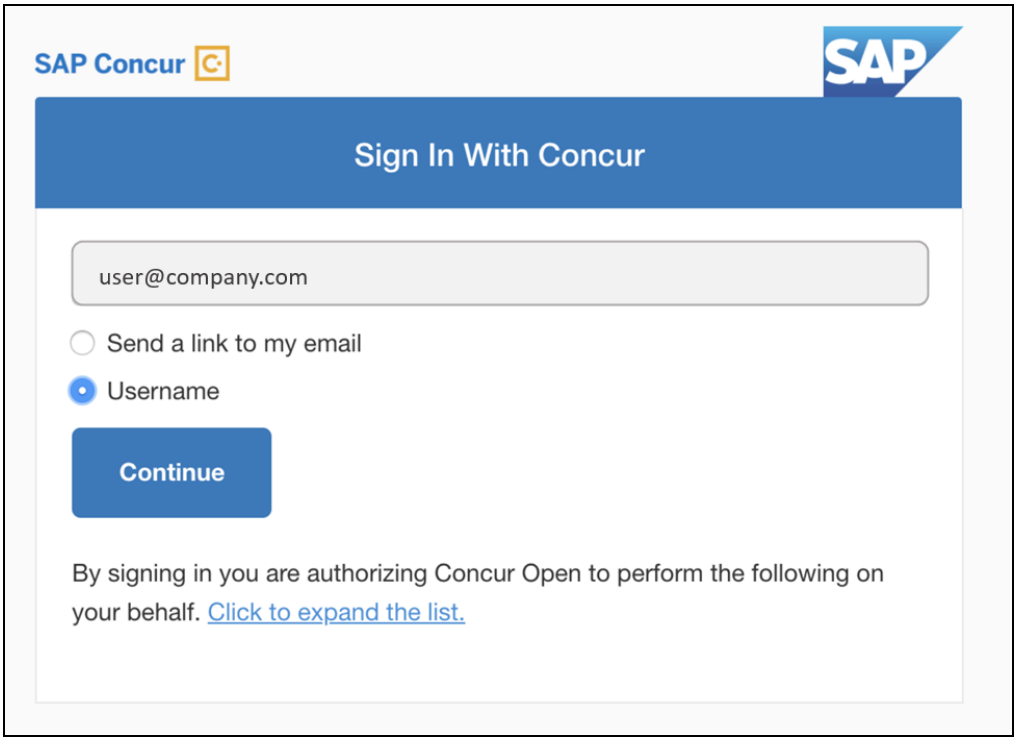
- For customers who do not use SSO, users sign in with their SAP Concur username and password.
- For customers who do use SSO, users can access the personalized view using their email address (described below).

On the main page, the user clicks the **Log in to Personalized Concur Open** button. The **Sign In With Concur** page appears.

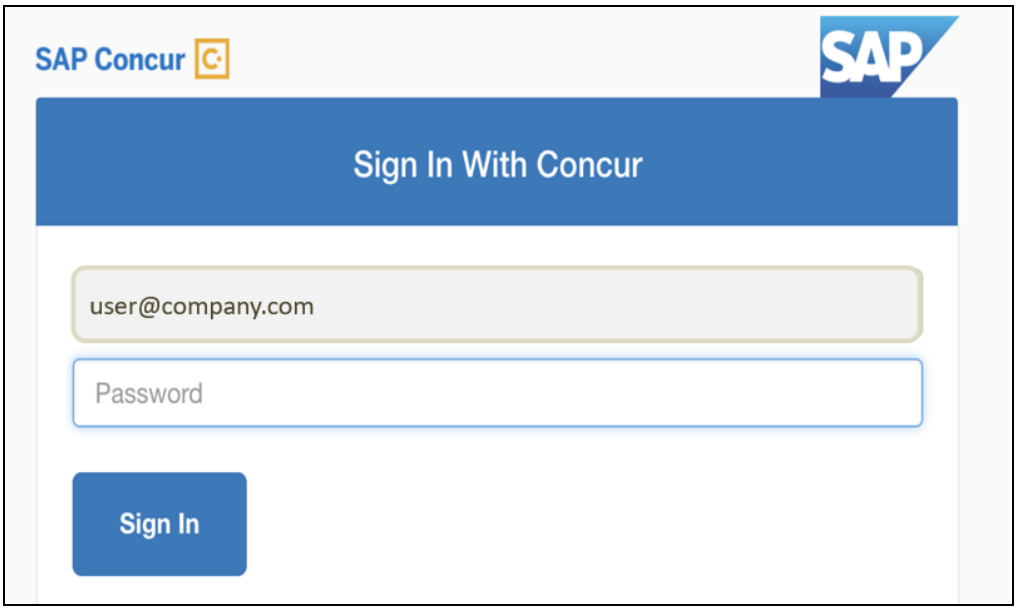


Then, depending on the user's normal sign-in procedure:

- **Username and password:** If the user normally signs in to SAP Concur using their username and password, then – on this page – the user enters their username, clicks **Username** (if necessary), and clicks **Continue**.



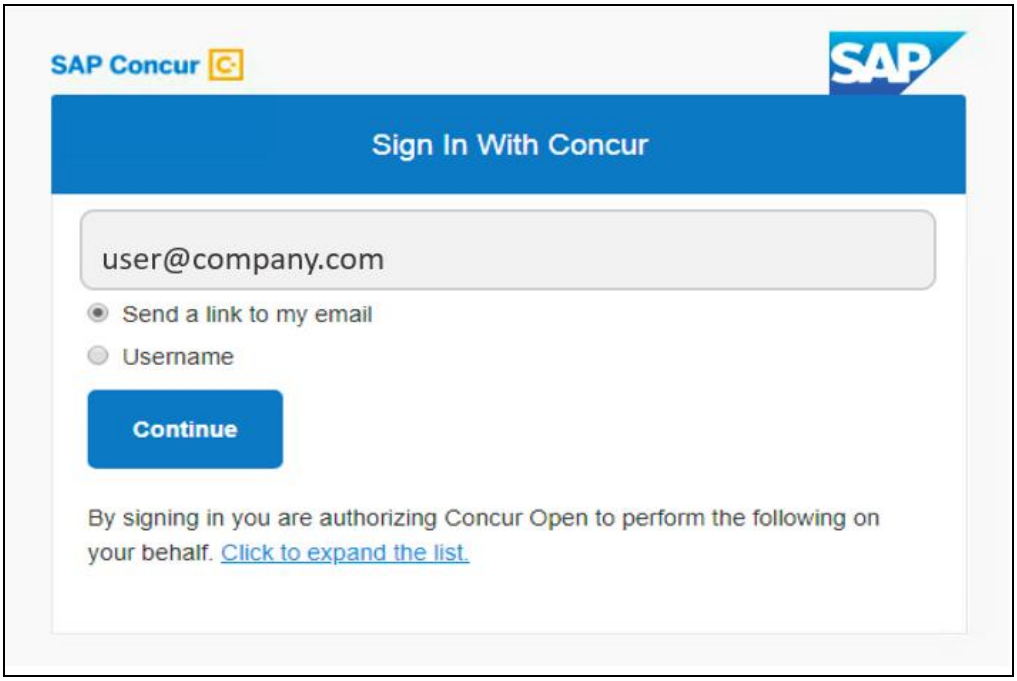
This page appears.



The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

📖 Refer to *User Remains Signed In* for additional information.

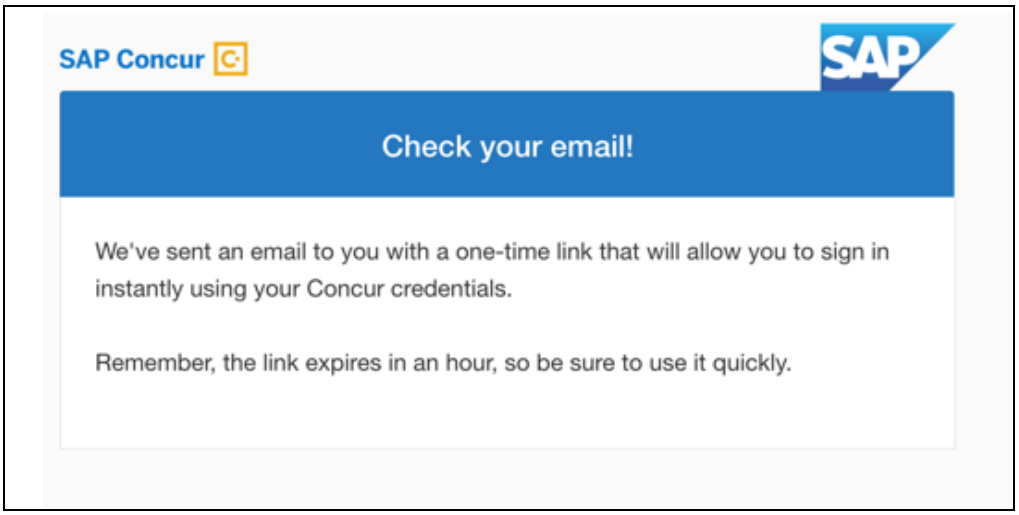
- **SSO:** If the user does not know their SAP Concur sign-in credentials (for example, the user's company uses SSO to access SAP Concur services), then – on this page – the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.



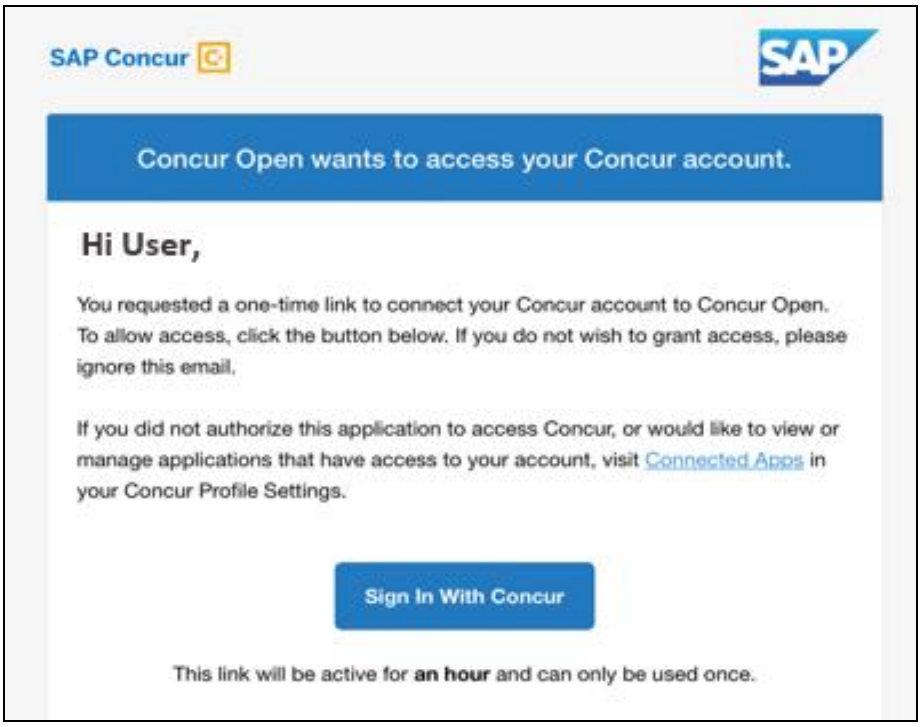
SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

📖 Refer to *SSO – More About Email Addresses in Profile* for more detail.

This message appears.



An email similar to this is sent to the email address.

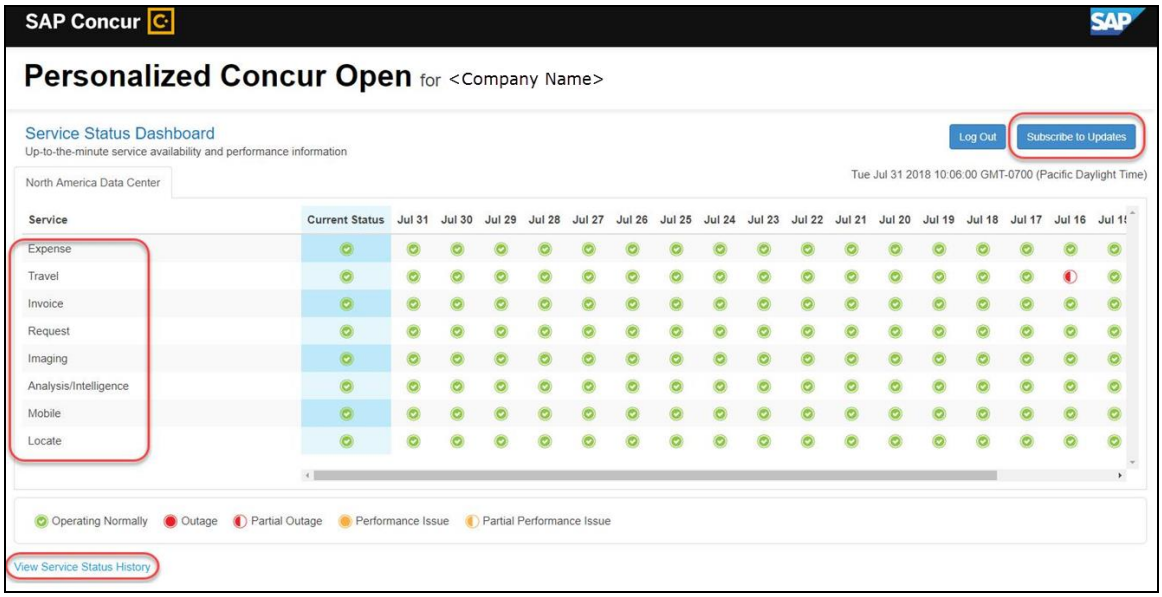


The user clicks **Sign In With Concur**. The user is then directed to the personalized view.

NOTE: The ***one-time*** link is active for ***one hour***. If the user does not click the link within an hour of it being generated, then the user must request another token.

📖 Refer to *User Remains Signed In* for additional information.

Once signed in, the personalized **Service Status Dashboard** page appears.

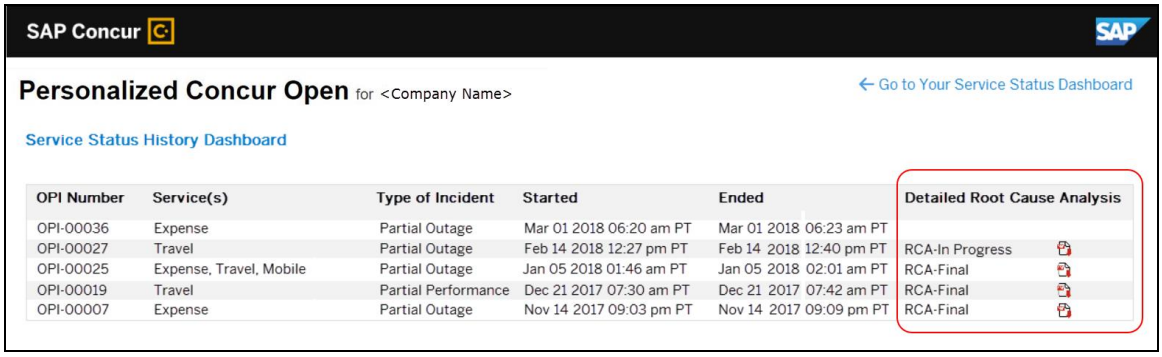


On this page, the user can:

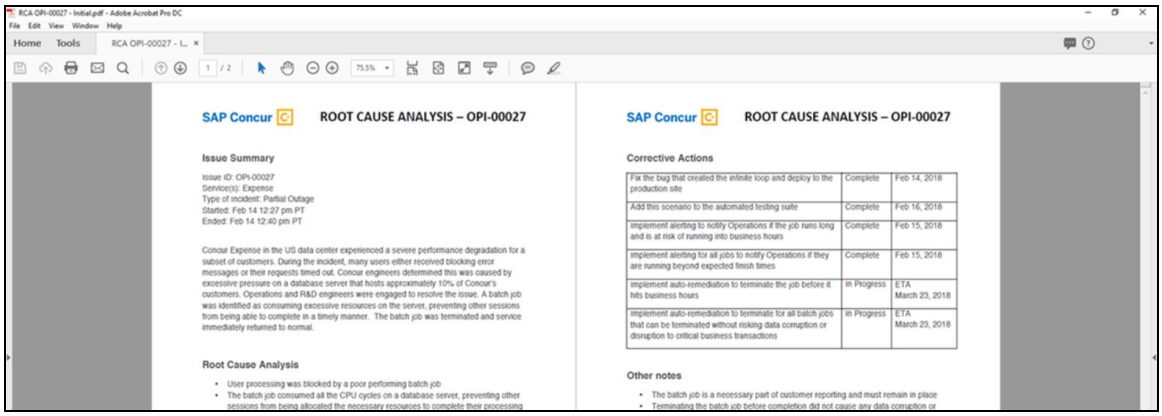
- View:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company.
- Subscribe to updates

VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for specific incidents.

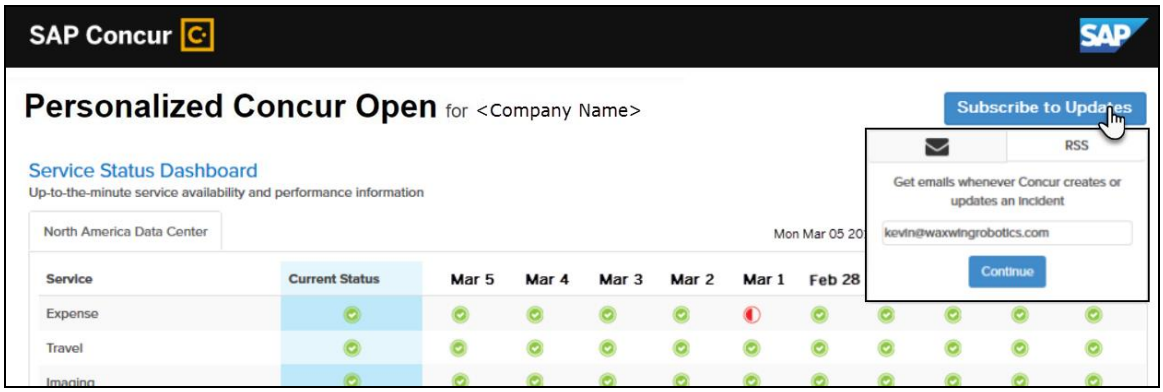


NOTE: Be aware that the detailed root cause analysis PDFs will be available starting around the date that the personalized view becomes available. The service history (start/stop dates and times, type of incident, etc.) will be displayed for the activity of the last two years. However, the root cause analysis PDFs will not be available for every incident and will only be available on a go-forward basis.

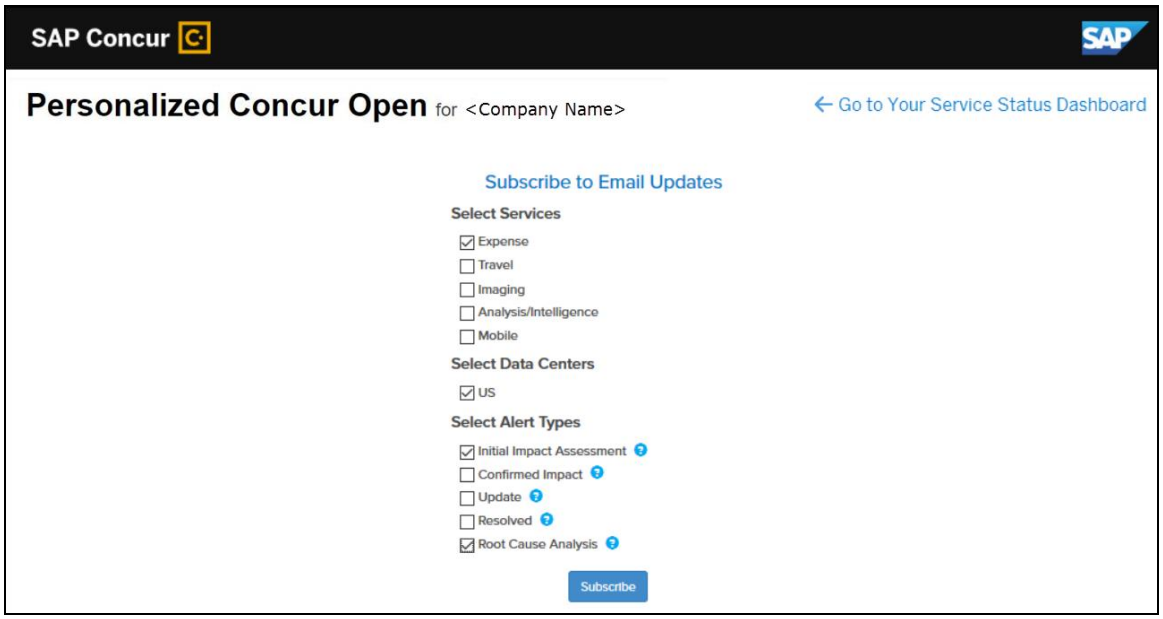
The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

SUBSCRIBE TO UPDATES

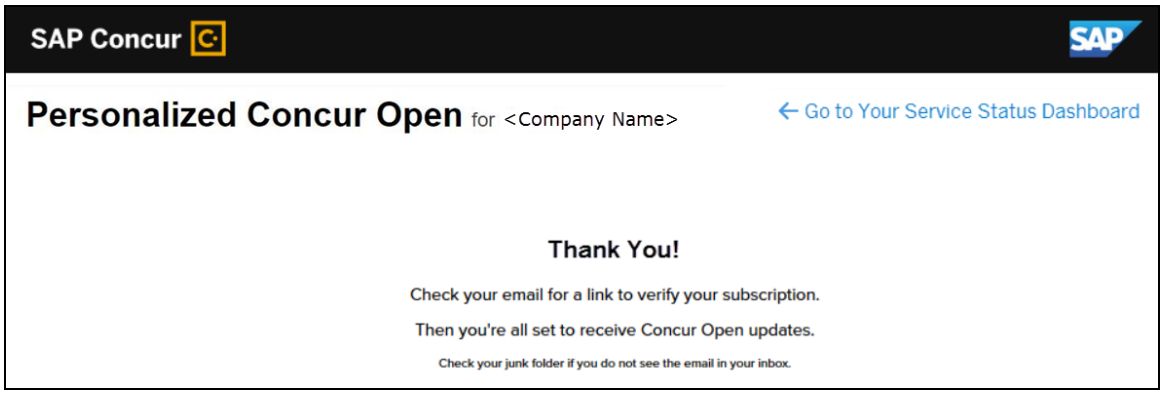
On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed. To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.



The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



User Remains Signed In

All users – regardless of whether they signed in via user name/password or via SSO email token – automatically remain signed in for 30 days (via a cookie). In that 30-day period, whether the user enters directly (https://open.concur.com) or they click **Service Status** in the lower-left corner of the SAP Concur screen, they are directed to the generic Concur Open page. When they click **Log in to Personalized Concur Open**, users bypass the login page and go directly to the **Personalized Concur Open** page.

If, during the 30-day period, the user wants to log out, they click **Log Out** on the **Service Status Dashboard** page. (Clearing the cache also terminates the 30-day period.)

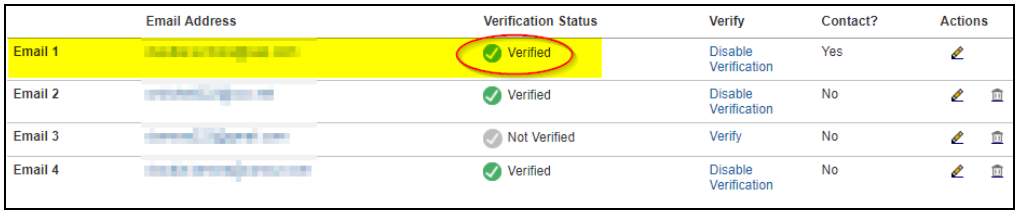
If, during the 30-day period, the customer acquires additional services from SAP Concur, the user should sign out and sign back in, in order to see the new service information.

SSO - More About Email Addresses in Profile

As described above, for SSO users who access Personalized Concur Open via the email token, SAP Concur authenticates the user by comparing the email address entered by the user to the email address in the user's SAP Concur profile.

Note the following:

- The email address that the user enters:
  - Must match the email address in the **Email 1** field in their SAP Concur profile; Email 1 must be "verified."



	Email Address	Verification Status	Verify	Contact?	Actions
Email 1		Verified	Disable Verification	Yes	
Email 2		Verified	Disable Verification	No	
Email 3		Not Verified	Verify	No	
Email 4		Verified	Disable Verification	No	

  - Must be unique to that user; it cannot be shared with multiple people or logins in their company

NOTE: Users can have duplicate (non-unique) email addresses in their profile but ***not*** in the **Email 1** field. Email 1 must be unique.

The notification below could be sent to the user as a result of having the email associated to multiple concur profiles.

Dear Concur User,

An attempt to login or connect to a partner application was made using this email address. We could not authorize this request because of an error. This is most likely because this email address is found to be a duplicate in our system. Please contact your administrator to resolve this issue.

If you did not request to be connected to any partner application, please ignore this email.

Best practice for SSO users – before requesting the token email – is to ensure Email 1 in Profile is accurate and unique.

- If an employee no longer has access to SAP Concur (for example, leaves the company), that employee can no longer access the personalized view. Remember, in order to access the personalized view, they must have a Concur login or an email address in Profile. An inactive user or terminated employee has neither of those things.

Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

For those with subscriptions ***before*** the release of the new Personalized Concur Open, note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
  - Set the user's new subscription to match the company's services and data center in Personalized Concur Open
  - Notify the user (via email) of the change

  NOTE: Best practice – after the personalized view is available – all users should access the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then SAP Concur will introduce the user (via email) to Personalized Concur Open.

Configuration / Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

Ongoing New User Interface for Concur Expense End Users

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

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

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

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

  Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense:** A***ll customers will be required to move to NextGen Expense***. This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

Plain Text File Transfer Protocol (FTP)

Support for Plain Text FTP Ended on September 1st, 2018

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur in November 2017. SAP Concur provided clients an extension until September 1st, 2018 to complete their transition to secure FTP protocols.

⚠ **IMPORTANT:** Any client that has not transitioned to a secure FTP protocol will be unable to download their SAE and other Extract files, or upload Employee, List, Attendee, and other Import files.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations applied a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

Configuration / Feature Activation

This maintenance was ***completed on*** September ***1***, 2018.

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

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

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

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

📖 For more information, please refer to the Client FAQ and the *File Transfer User Guide*.

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

QuickBooks Financial Integration

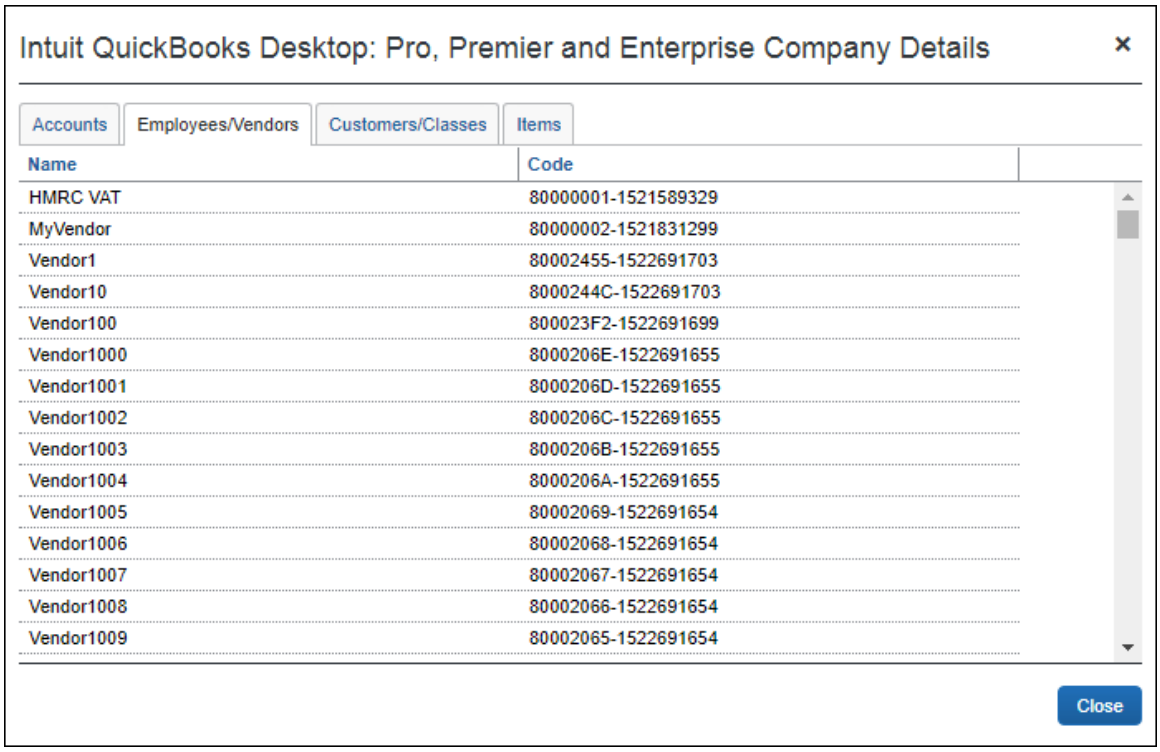
QuickBooks Data Page Updated

Overview

SAP Concur has updated the page displaying the QuickBooks objects synchronized with SAP Concur for clients that use financial integration. This page (accessed from the **Accounting** page of Product Settings) now contains tabs for each type of object synchronized with SAP Concur:

- Accounts
- Employees/Vendors
- Customers/Classes
- Items

The admin can select the desired tab to view the objects, and can now view the Code in addition to the Name for each cost object.



BUSINESS PURPOSE / CLIENT BENEFIT

This update provides a detailed view of the objects synchronized between QuickBooks and SAP Concur, with improved performance.

Configuration / Feature Activation

This feature is only available to clients using the financial integration between SAP Concur and QuickBooks. The feature is automatically on; there are no additional configuration or activation steps.

Uploading Receipt Images

Support for Uploading HTML Ends September 15th, 2018

Overview

Users no longer have the option to upload scanned images of receipts that are formatted as HTML files.

Users will continue to be able to upload receipt images that use the following file formats: PNG, JPG, JPEG, PDF, TIF, and TIFF.

BUSINESS PURPOSE / CLIENT BENEFIT

This change closes a security gap and allows SAP Concur to devote more resources to features that are used by many or most of our clients.

Configuration / Feature Activation

This change is automatically available; there are no configuration or activation steps.

📖 For general information about uploading receipt images, refer to the *Concur's Imaging Service – Overview* Expense End User Help topic.

Planned Changes

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

Admin

Planned Changes Expense Assistant Can Create Trip-based Expense Reports

Overview

Admins can now pre-configure Expense Assistant options.

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

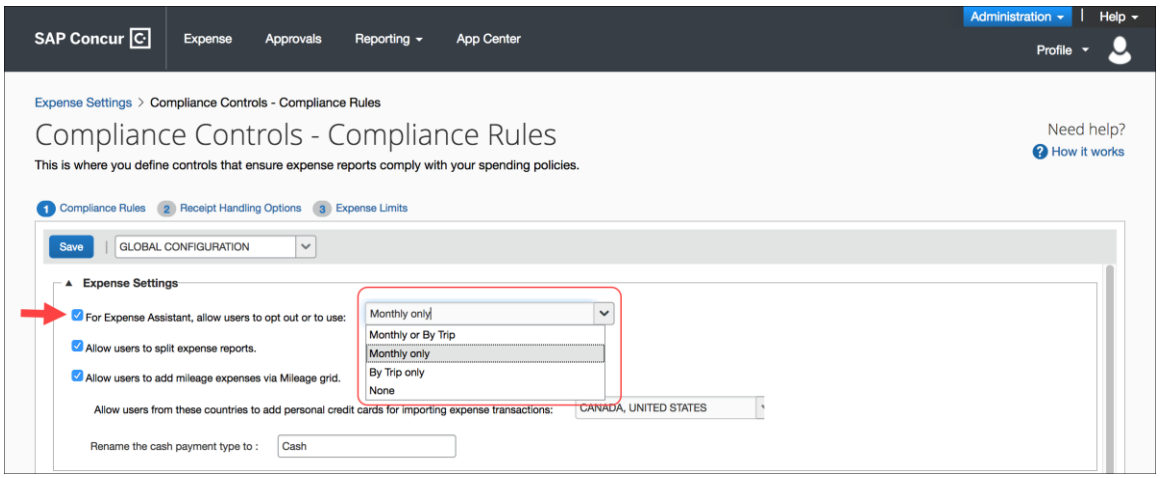
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Expense Settings > Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use** field's list will show the new choices.

With this field, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users, and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration remains unchanged.

For new clients, by default, **For Expense Assistant, allow users to opt out or to use** is enabled and *Monthly or By Trip* is selected from the list.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Expense Settings > Compliance Controls – Compliance Rules** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list.

Until the trip-based expense report functionality for Expense Assistant is completed in a future release, Expense Assistant will continue creating calendar-based expense reports for the users if you select the *Monthly or By Trip* or *Monthly* only options in the **For Expense Assistant, allow users to opt out or to use** field.

If you select the *By Trip only* or *None* options, Expense Assistant will be disabled for all your users and they will not see any Expense Assistant functionality.

For more information about Expense Assistant, refer to the *FAQ - Expense Assistant* available from the fact sheet landing page.

Product Settings

Planned Changes Cost Tracking to Have New Look, New Name

Overview

The **Cost Tracking** page in Product Settings will soon have a new look and flow, and a new name. All existing functionality will remain with improved usability for field setup and management.

The new enhancements include the following:

- The **Cost Tracking** page will be renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page will allow client admins to manage custom fields starting from one page. **Linked List** will be renamed to **Multilevel list**.
- A new **Add New Field** page will also be accessible from the **Manage Custom Fields** page. The **Add New Field** page will allow client admins to create fields by selecting the field's type and then selecting field options. Client

admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end user experience.

Configuration / Feature Activation

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

📖 For more information, refer to the *Shared: Cost Tracking Setup Guide*.

More Information

Additional information will be available in future release notes.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

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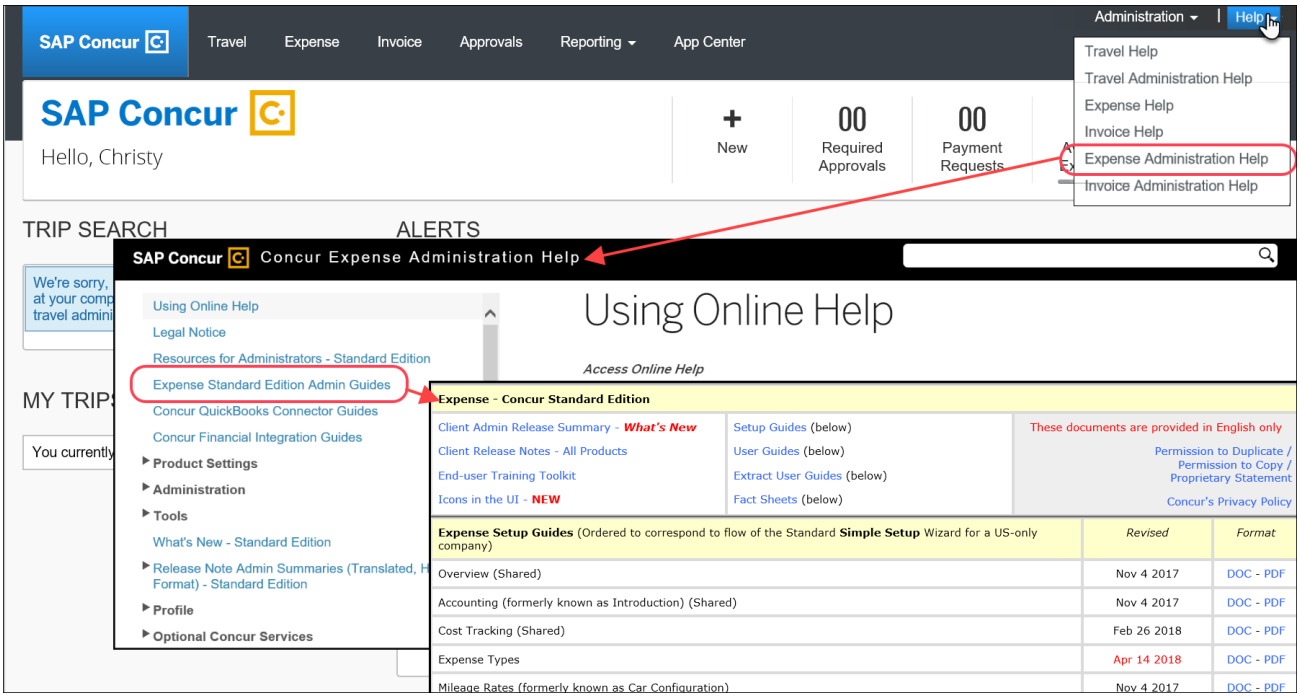
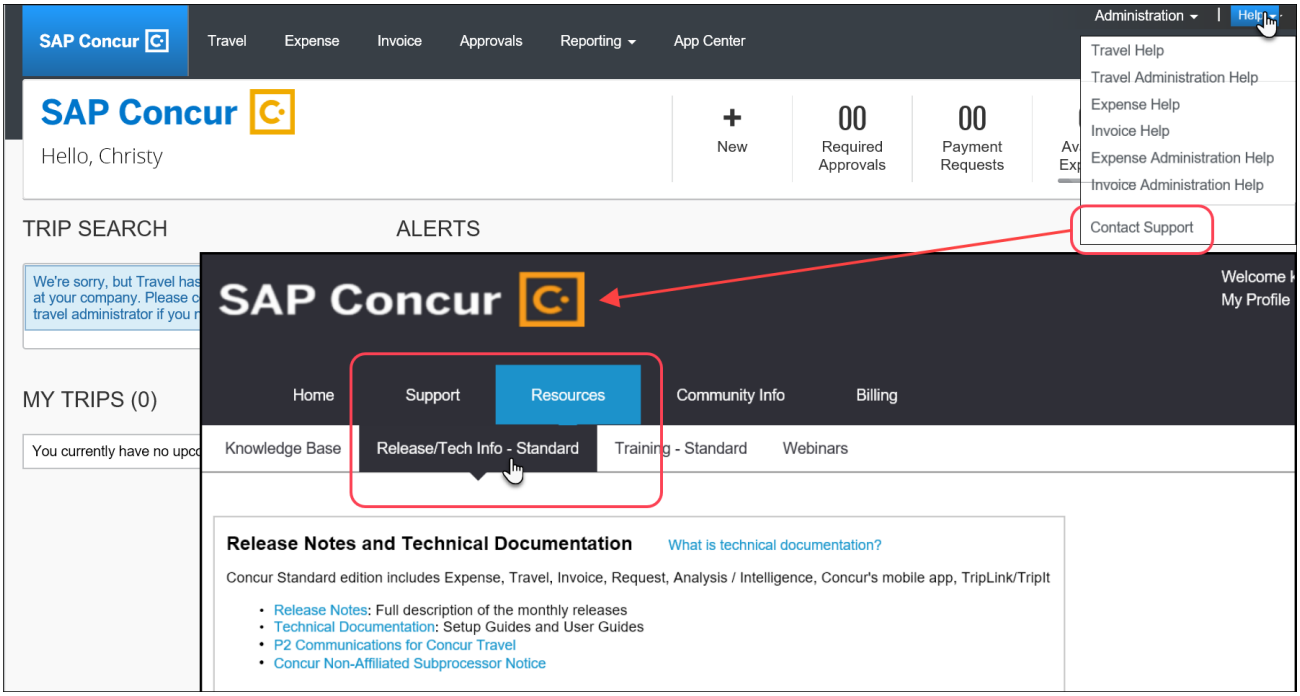


Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: October 20, 2018 Initial Post: Friday, October 19, 9:00 AM PT	SAP Concur Client ***FINAL***

Contents

Legal Disclaimer

Release Notes

Admin

Updated Email Format

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, consistent look-and-feel across all SAP Concur services. The change will be introduced gradually. Some users will see the updated format immediately; some will see it over the next few months.

Be aware that the email content has not changed – just the look and feel.

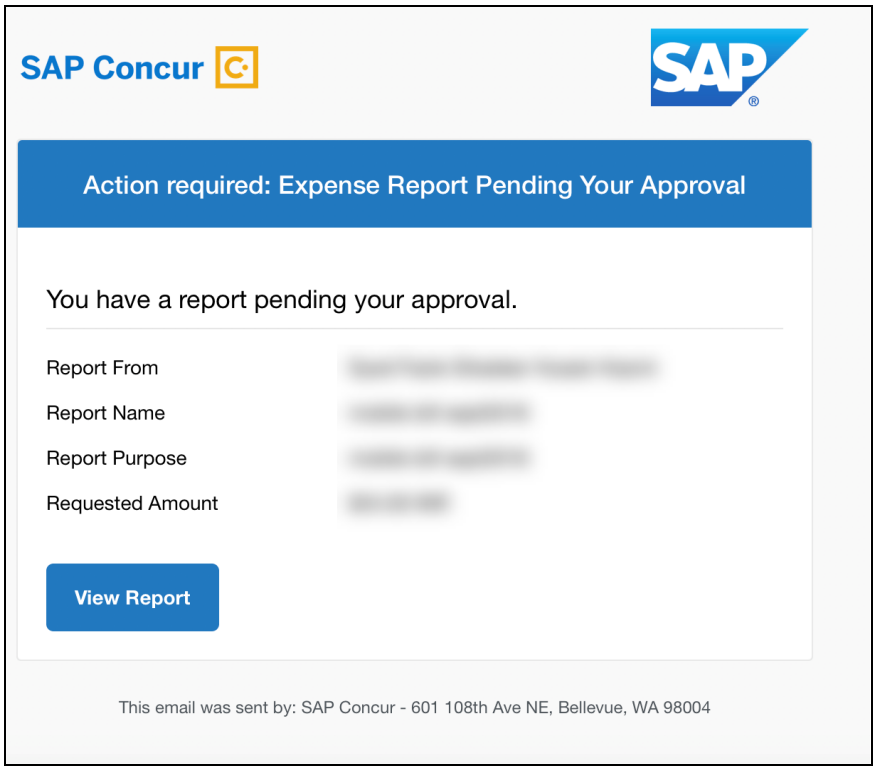
BUSINESS PURPOSE / CLIENT BENEFIT

The intent is to provide a consistent, updated look for users.

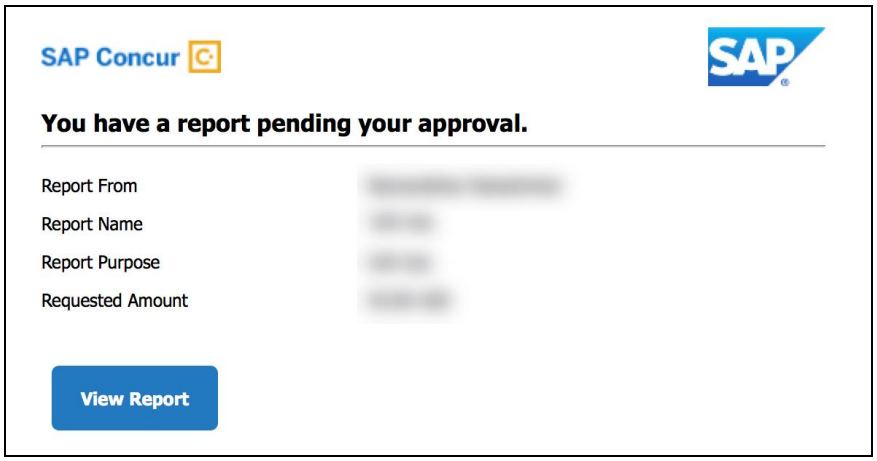
What the User Sees

The report approval email is shown below. Over time, all email generated from SAP Concur will have a similar look.

New email format:



Current email format:



Configuration / Feature Activation

This change will occur, over time, automatically; there are no additional configuration or activation steps.

Email Infrastructure Change

Whitelist IP Addresses

Overview

SAP Concur is transitioning to a new email infrastructure for outbound emails from our products to SAP Concur users. Because of this, companies who filter inbound email based on the sending IP address must whitelist new IP addresses to ensure that their users receive email from SAP Concur.

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. Please work with your email server management team to ensure any required whitelists for IP addresses are updated so that your users continue to receive SAP Concur emails without interruptions.

Configuration / Feature Activation

Companies who filter inbound emails based on the sending IP address should obtain the IP address from SAP Concur support and modify their whitelists.

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Admin Sees

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

What the User Sees

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

Configuration / Feature Activation

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

Mileage Rates

(UK) HMRC Advisory Electricity Rate

Overview

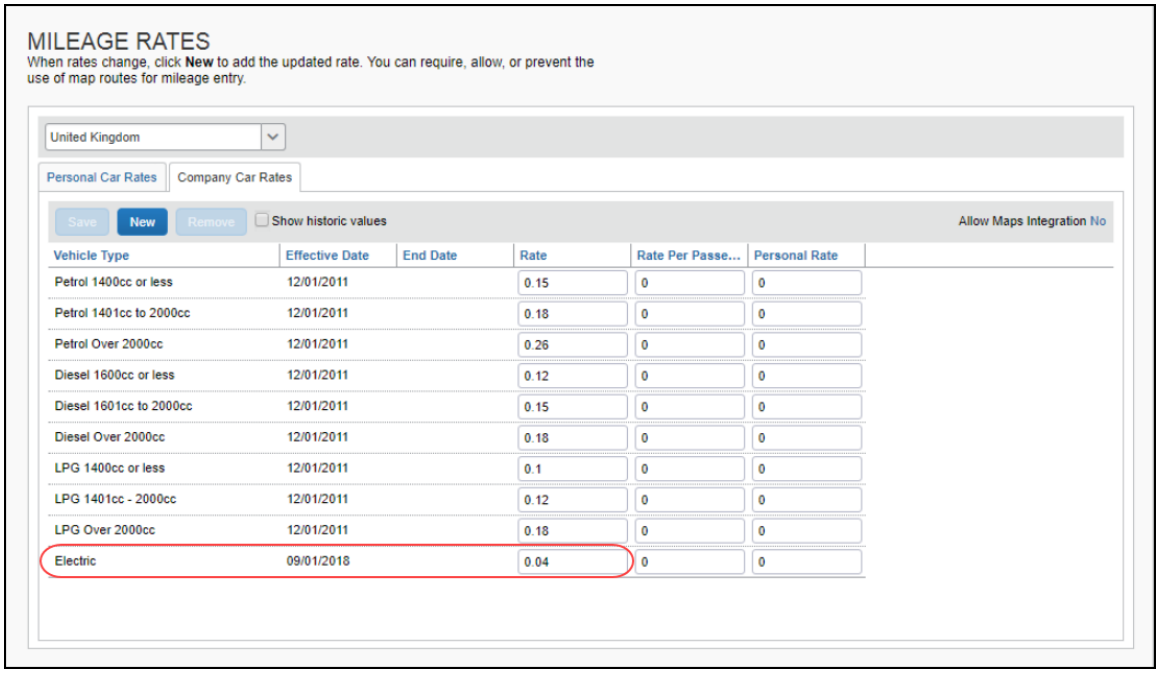
Effective September 1, 2018, SAP Concur has added an advisory electricity rate of 4 pence per mile for fully electric company cars in accordance with Her Majesty's Revenue and Customs (HRMC).

BUSINESS PURPOSE / CLIENT BENEFIT

Businesses maintain best-practice tax compliance.

What the Admin Sees

The new rate displays on the **Company Car Rates** tab of the **Mileage Rates** page in Product Settings.



Configuration / Feature Activation

The **Mileage Rates** page automatically displays the new advisory rate; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

Ongoing New User Interface for Concur Expense End Users

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

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

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

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

- **We are currently in the Preview Period:** During this time, the new UI is available to customers worldwide. We encourage administrators/power users to use the Preview Period to become familiar with the new interface and

process flows. This is also an excellent time to begin updating internal training materials and preparing the organization for the mandatory transition.

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

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

  Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense:** A***ll customers will be required to move to NextGen Expense***. This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

  Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

Receipts API

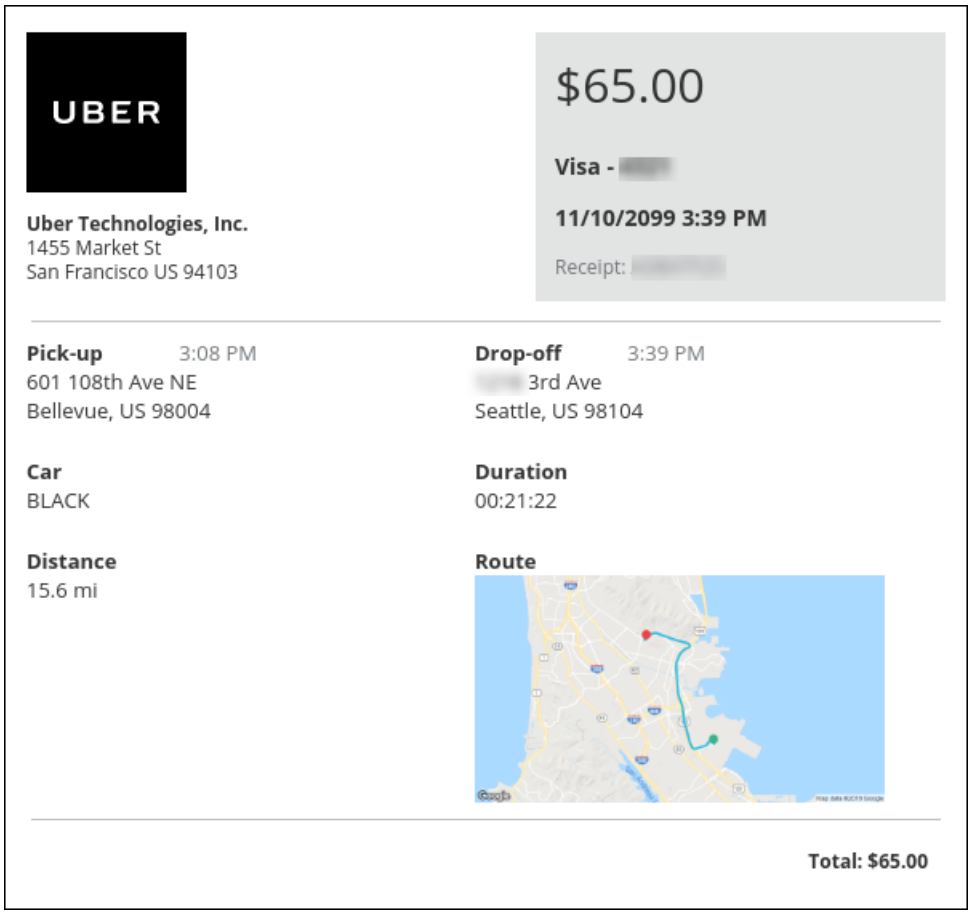
New MapUrl Field Added to Receipts v4 API

Overview

A new field, **MapUrl**, has been added to the Ground Transportation Receipt schema of the Receipts v4 API. This field contains a link to an image on Google Maps of the trip, if provided by the ground transportation supplier.

WHAT THE USER SEES

If the ground transportation provider sends the MapUrl to SAP Concur, the user will see a map image of the trip in the e-receipt window in Concur Expense.



BUSINESS PURPOSE / CLIENT BENEFIT

The new **MapUrl** field provides additional information about the ground transportation trip.

Configuration / Feature Activation

The image will appear automatically in the e-receipt window if the ground transportation supplier sends it to SAP Concur. There are no additional configuration or activation steps.

For more information on Receipts v4 API, refer to https://developer.concur.com.

Planned Changes

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

Admin

Planned Changes Archive Deactivated User Data

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet customer expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for ***at least three years***. The archive process moves this "deactivated" user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

USER / CUSTOMER BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for inactive user's personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that customers are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

A. SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

A. SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – they have been "marked inactive" in the SAP Concur system. A user must be deactivated for ***over 3 years*** without having been re-activated in order to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

A. ***For Professional Edition***, the most significant difference would occur in **Company Admin > User Administration**.

However, once user information is archived:

- From within User Administration, if the **Use Travel Advanced Filters** option is chosen, the user will not be visible.
- From within User Administration, if the **Use Expense Advanced Filters** option is chosen, you will be able to see the user in search results as deactivated.
    - If you click the user's name, you will receive an error message: *The selected user exists in the Expense or Invoice application but the user contains conflicting or missing data. Contact SAP Concur support to request help in resolving this error.*
    - If you click the icon in the **Profile** column, you will receive the generic error message.
    - If you click the user's login ID, you will see no historical login information for that user.

- If another user has the Self-Assigning Assistant permission or the user is a Proxy who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive an "switching user" error message.
- From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- These users will not have access to any of their past travel history.
- For Expense, the user would have access to their expense history if:
  - That history has not been removed by a Data Retention policy.
  - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

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

Expense Assistant

Planned Changes Expense Assistant Can Create Trip-based Expense Reports

Overview

Admins can now pre-configure Expense Assistant options.

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

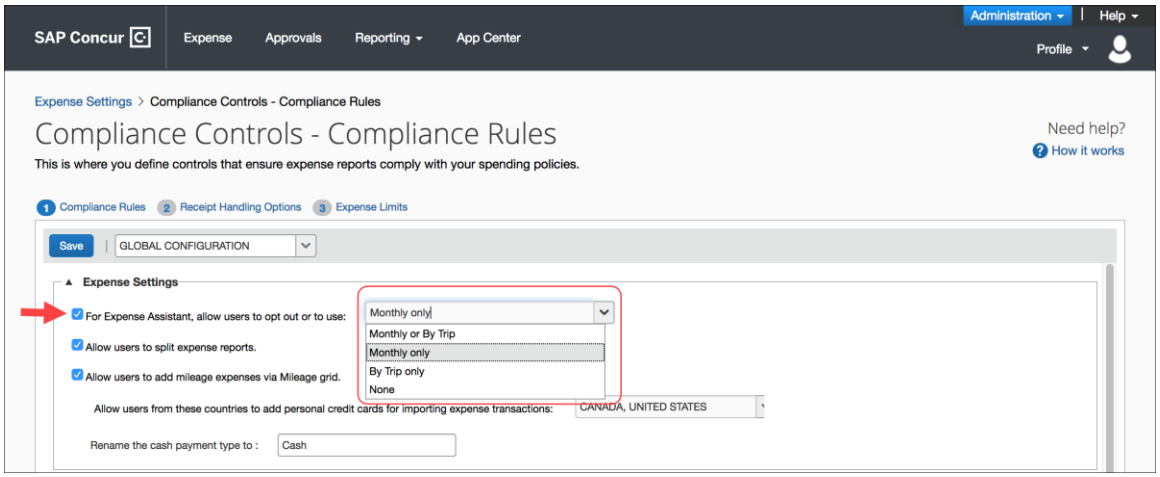
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Expense Settings > Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use** field's list will show the new choices.

With this field, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users, and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration remains unchanged.

For new clients, by default, **For Expense Assistant, allow users to opt out or to use** is enabled and *Monthly or By Trip* is selected from the list.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Expense Settings > Compliance Controls – Compliance Rules** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list.

Until the trip-based expense report functionality for Expense Assistant is completed in a future release, Expense Assistant will continue creating calendar-based expense reports for the users if you select the *Monthly or By Trip* or *Monthly* only options in the **For Expense Assistant, allow users to opt out or to use** field.

If you select the *By Trip only* or *None* options, Expense Assistant will be disabled for all your users and they will not see any Expense Assistant functionality.

For more information about Expense Assistant, refer to the *FAQ - Expense Assistant* available from the fact sheet landing page.

Product Settings

Planned Changes Cost Tracking to Have New Look, New Name

Overview

The **Cost Tracking** page in Product Settings will soon have a new look and flow, and a new name. All existing functionality will remain with improved usability for field setup and management.

The new enhancements include the following:

- The **Cost Tracking** page will be renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page will allow client admins to manage custom fields starting from one page. **Linked List** will be renamed to **Multilevel list**.
- A new **Add New Field** page will also be accessible from the **Manage Custom Fields** page. The **Add New Field** page will allow client admins to create fields by selecting the field's type and then selecting field options. Client admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end user experience.

Configuration / Feature Activation

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

📖 For more information, refer to the *Shared: Cost Tracking Setup Guide*.

More Information

Additional information will be available in future release notes.

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur Standard Editions of Expense, Invoice, Travel, and Request to provide clients with a self-service option for setting up SSO for their organization.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Access To Concur** section of Product Settings.

- Single Sign-On can be managed for Standard Travel if it is bundled with Expense, Invoice, and/or Request.
- For standalone Standard Travel, the Manage Single Sign-On feature will be accessible from the **Travel Settings** page.

Other SAP Concur products and services are outside the scope of this initial release.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides a self-service option for setting up SSO.

Configuration / Feature Activation

More information will be coming in a future release note.

Planned Changes (USA) New Mileage Configuration

Overview

SAP Concur Standard Editions of Expense, Invoice, Travel and Request will soon have a new **Mileage Configuration** page that provides automated updates for government mileage rates. This feature will replace the existing **Mileage Rates** page.

The Mileage Configuration feature has two key benefits:

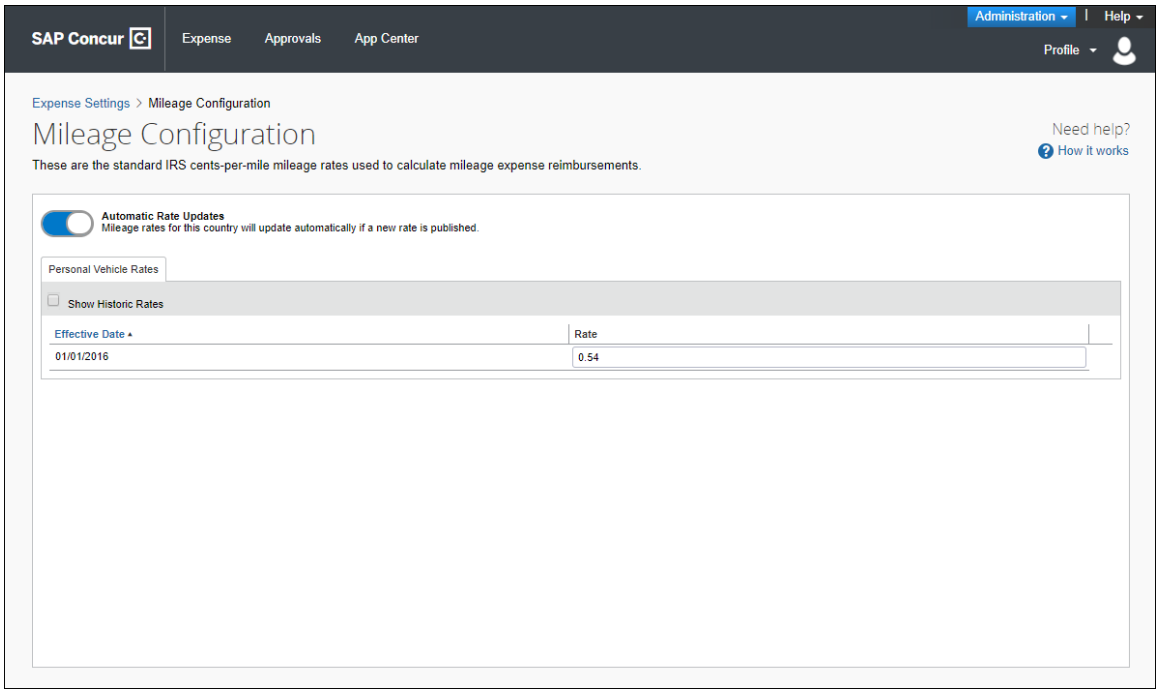
- For a client using government rates, the new mileage service will keep these updated resulting in reduced effort on the client's part to maintain and manage the rates.
- For taxability purposes, the system will record the claimed amount difference between the amount paid using the client rate versus the amount based on the government rate.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature reduces the client admin's effort to maintain and manage mileage rates.

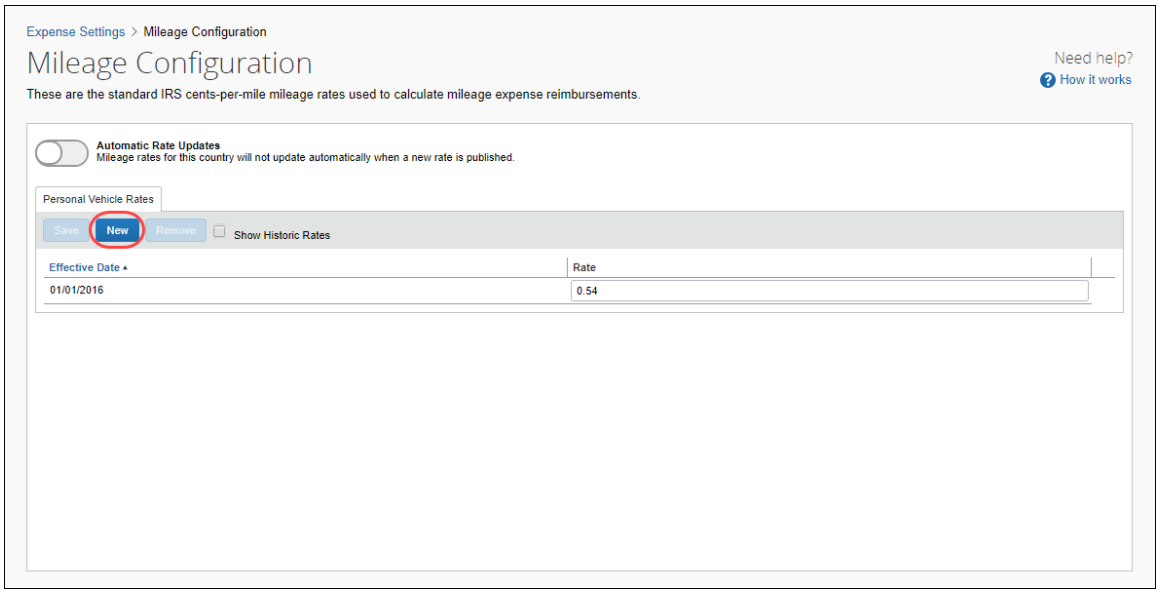
What the Admin Sees

Client admins will see a new **Mileage Configuration** page in Product Settings. If enabled, **Automatic Rate Updates** automatically update new rates for a country when a new rate is published.



As more countries are added, a country list will be added to the **Mileage Configuration** page to accommodate additional countries.

To turn off automated rate updates, admins will click **Automatic Rate Updates** and then click **OK** in the message box.

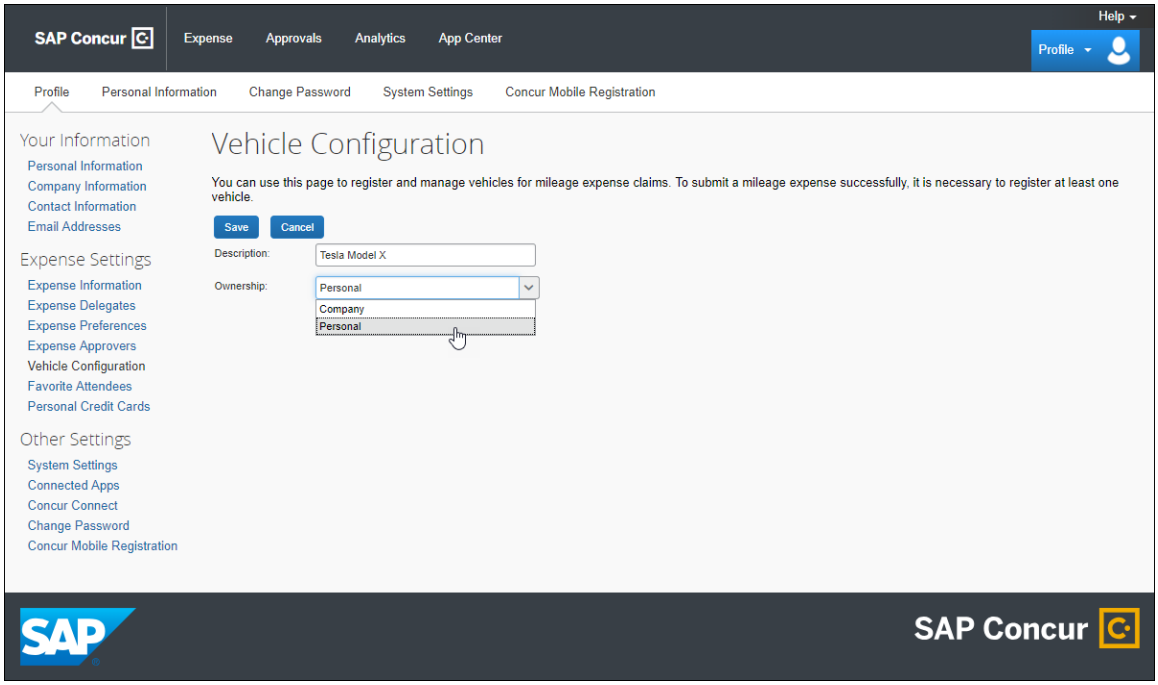


Clients will be able to turn off the automated mileage rate functionality for the purpose of displaying the **New** button to add additional rates. Once company rates are entered, they can turn the **Automatic Rate Updates** feature on again at any time.

What the Client Sees

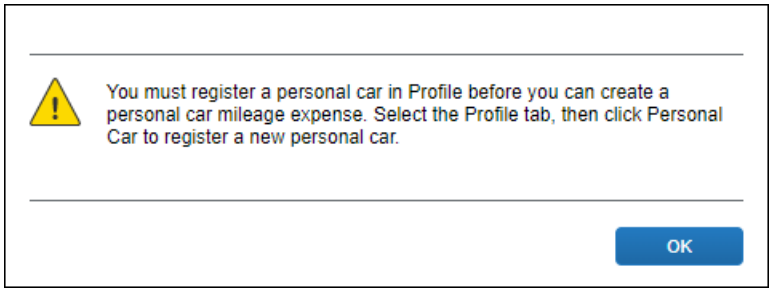
In the past, USA clients did not have to register a car vehicle. With the new Mileage Configuration feature, clients will always need to register a car vehicle.

Clients will see a new **Vehicle Configuration** page in Profile Settings.



Clients will not be able to submit an expense report containing a mileage expense without first registering a vehicle in Profile Settings. Clients will not see any other changes in the user interface when creating and submitting expense reports.

If a user attempts to submit an expense report with mileage and they have not yet registered a vehicle, a dialog box will appear prompting the user to register a vehicle.



Configuration / Feature Activation

On the **Mileage Configuration** page in Product Settings, click **Automatic Rate Updates** to turn on this feature.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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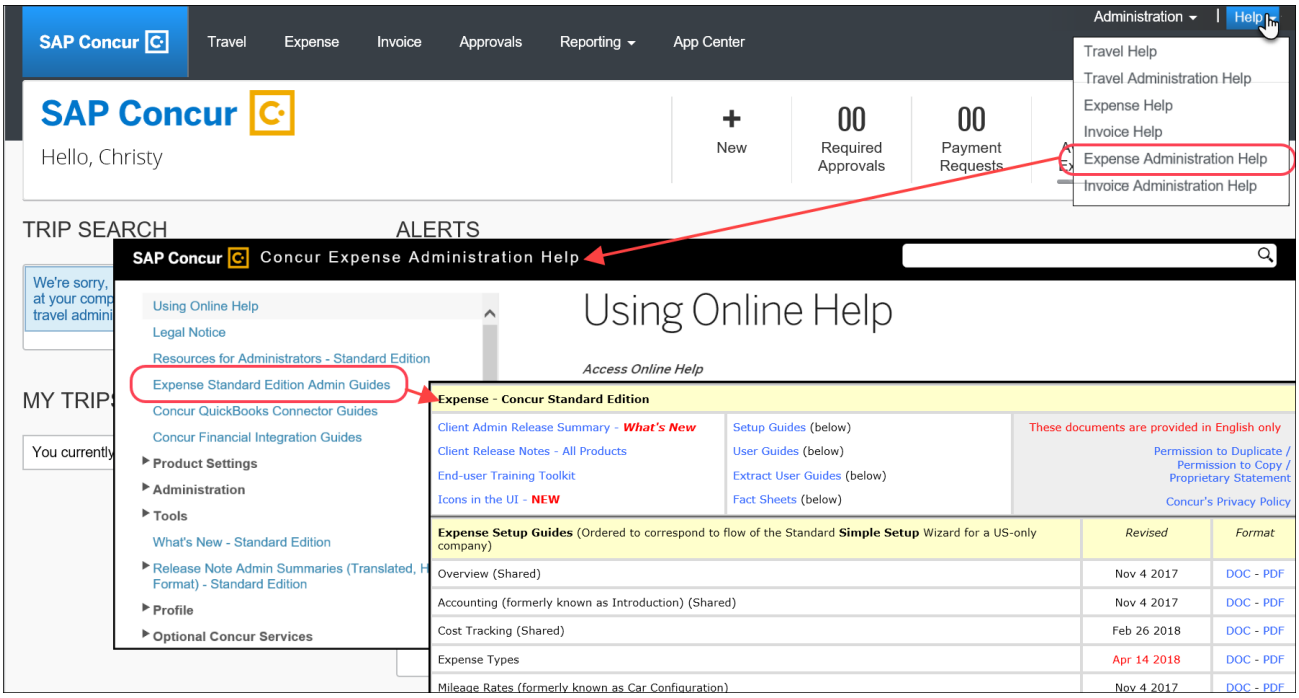

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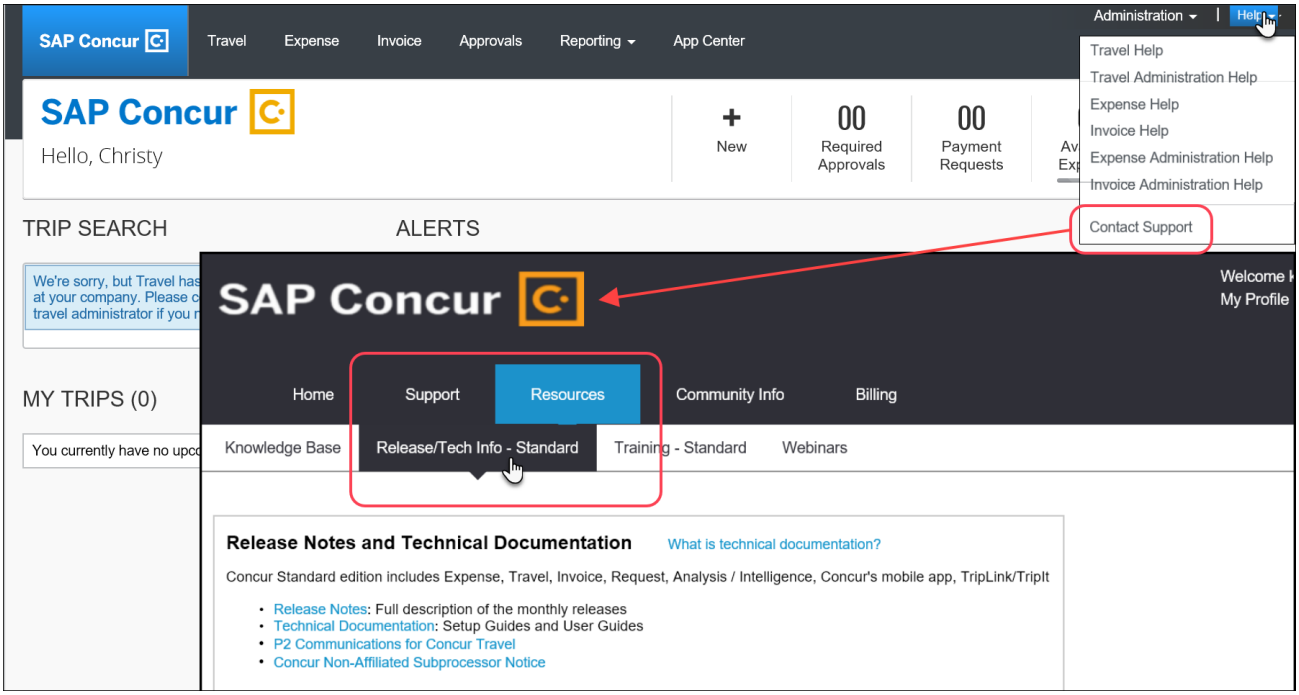

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Month	**Audience**
Release Date: November 17, 2018 Initial Post: Friday, November 16, 2:00 PM PT	SAP Concur Client ***FINAL***

Contents

Legal Disclaimer

Release Notes

Accounting

New Options in Accounting Software

Overview

New choices are available in the **Select your accounting software** list on the **Accounting** page in Product Settings.

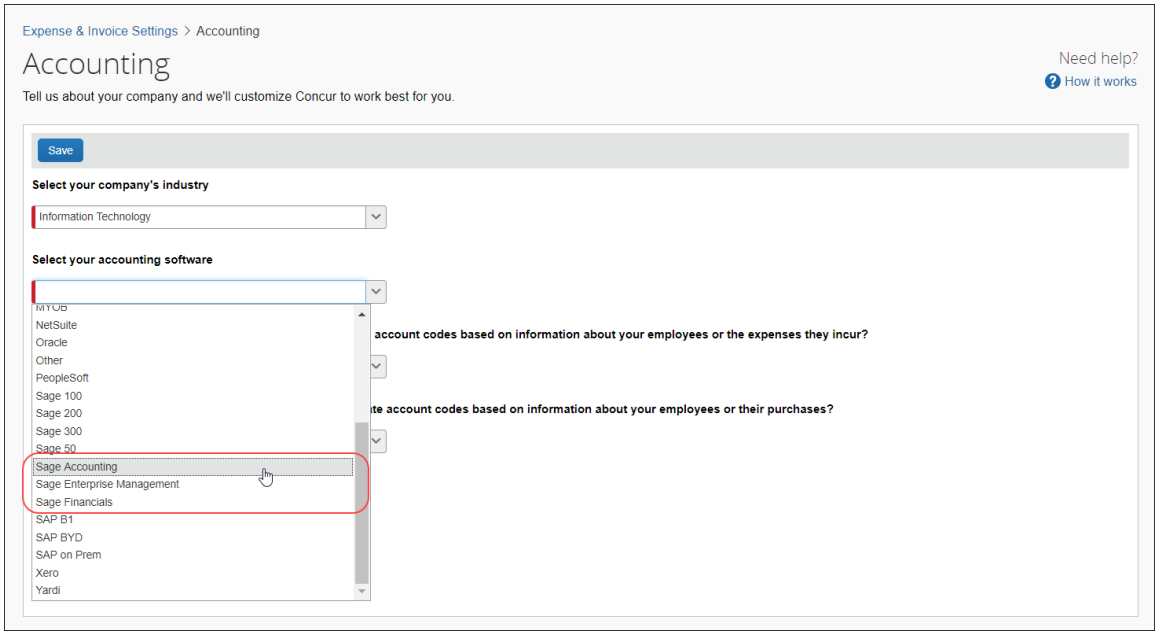
- Sage Accounting
- Sage Enterprise Management
- Sage Financials

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement helps maintain current accounting software listings by reflecting popular, current accounting software choices.

What the Admin Sees

On the **Accounting** page, the client admin now sees new accounting software in the **Select your accounting software** list.



Configuration / Feature Activation

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

Admin

Ongoing Updated Email Format

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, consistent look-and-feel across all SAP Concur services.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent is to provide a consistent, updated look for users.

IMPORTANT

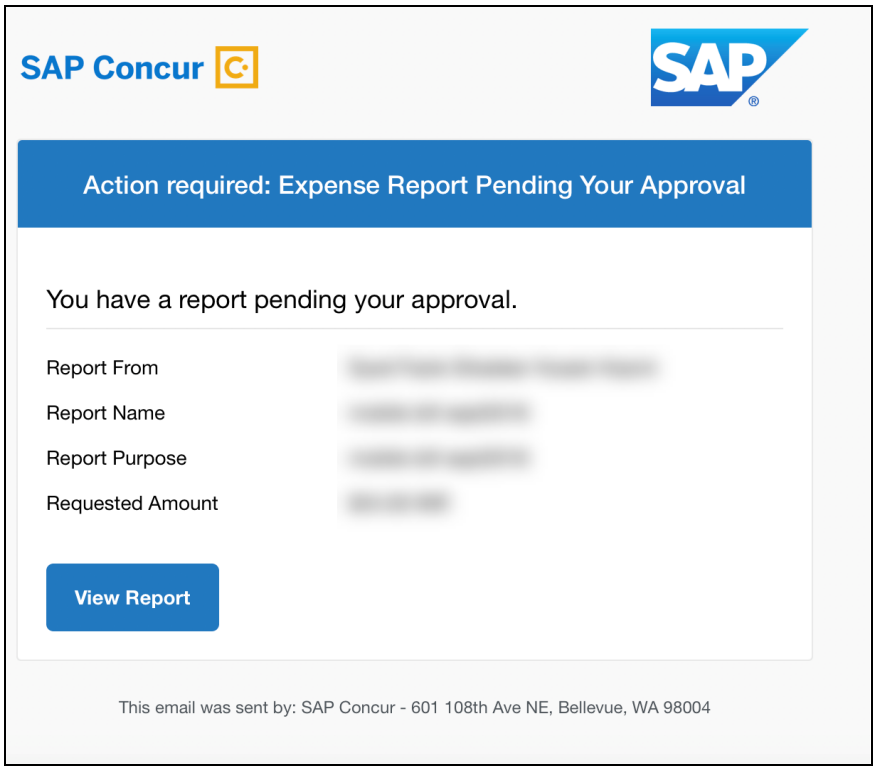
Note the following:

- Be aware that the email content has not changed – just the look and feel.
- The changes will appear over time. Each product team (Expense, Invoice, Travel, etc.) decides when to use the new format. Timing will be based on resource availability and the priority of other scheduled enhancements.
- Do not expect that all product emails will change at the same time. For example, perhaps Expense approval email will be first, and then other Expense notifications will follow.
- There is no assigned end date to the project. Expect that the changes may take longer than a year.
- Each team will provide release notes when their new emails are scheduled to appear.

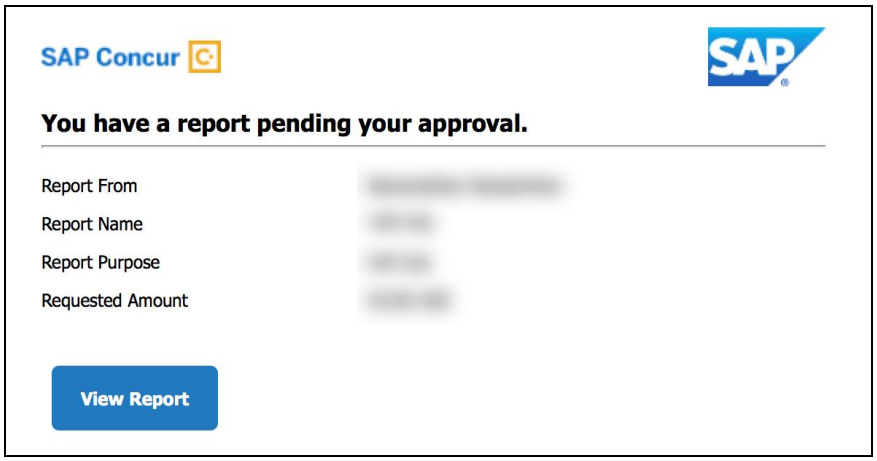
What the User Sees

The Expense approval email is shown below. Over time, all email generated from SAP Concur will have a similar look.

New email format:



Current email format:



Configuration / Feature Activation

This change will occur, over time, automatically; there are no additional configuration or activation steps.

Email Infrastructure Change **Ongoing**

Add IP Addresses to Safe Sender List

Overview

SAP Concur is transitioning to a new email infrastructure for outbound email from our products to SAP Concur users. Because of this, companies who filter inbound email based on the sending IP address must add the new IP addresses to their Safe Sender list to ensure that their users receive email from SAP Concur.

Concur Expense Only

Be aware that – at this time – the issue described here affects only companies that use Concur Expense ***and*** filter incoming email based on IP addresses. (This includes all editions of Expense – whether the company uses Concur Expense by itself or integrated with any other SAP Concur product or service.) Other SAP Concur services (such as Travel and Concur Pay) are not currently affected.

We are currently targeting the first quarter of 2019 to make additional changes. Be aware that all affected companies will be notified well ahead of time and will be provided all possible options for managing this issue.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If you use Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure any required Safe Sender lists for IP addresses are updated so that your users continue to receive SAP Concur email without interruptions.

Expense Assistant

Expense Assistant Can Create Trip-Based Expense Reports

Overview

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

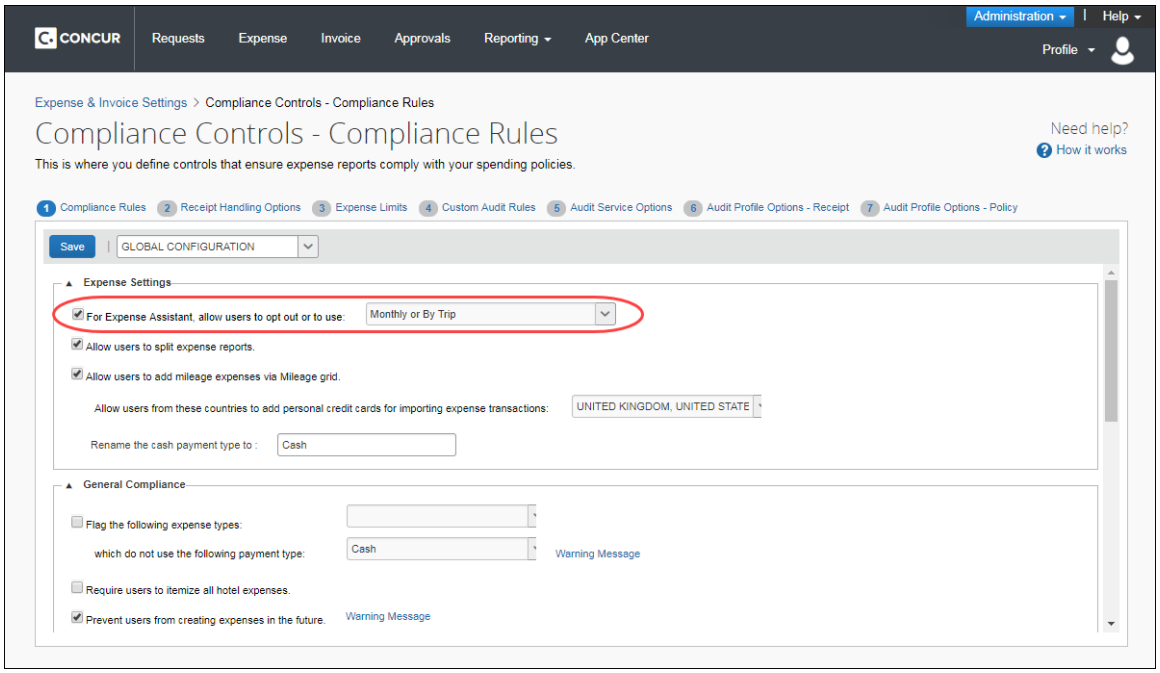
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use:** list contains new options.

With this list, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant

automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.

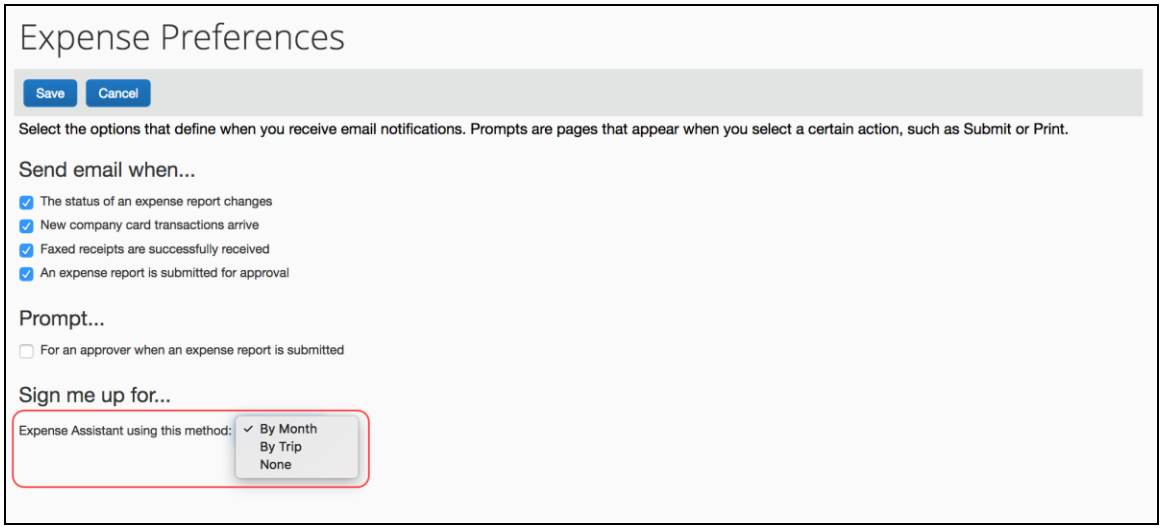
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

What the User Sees - Existing UI

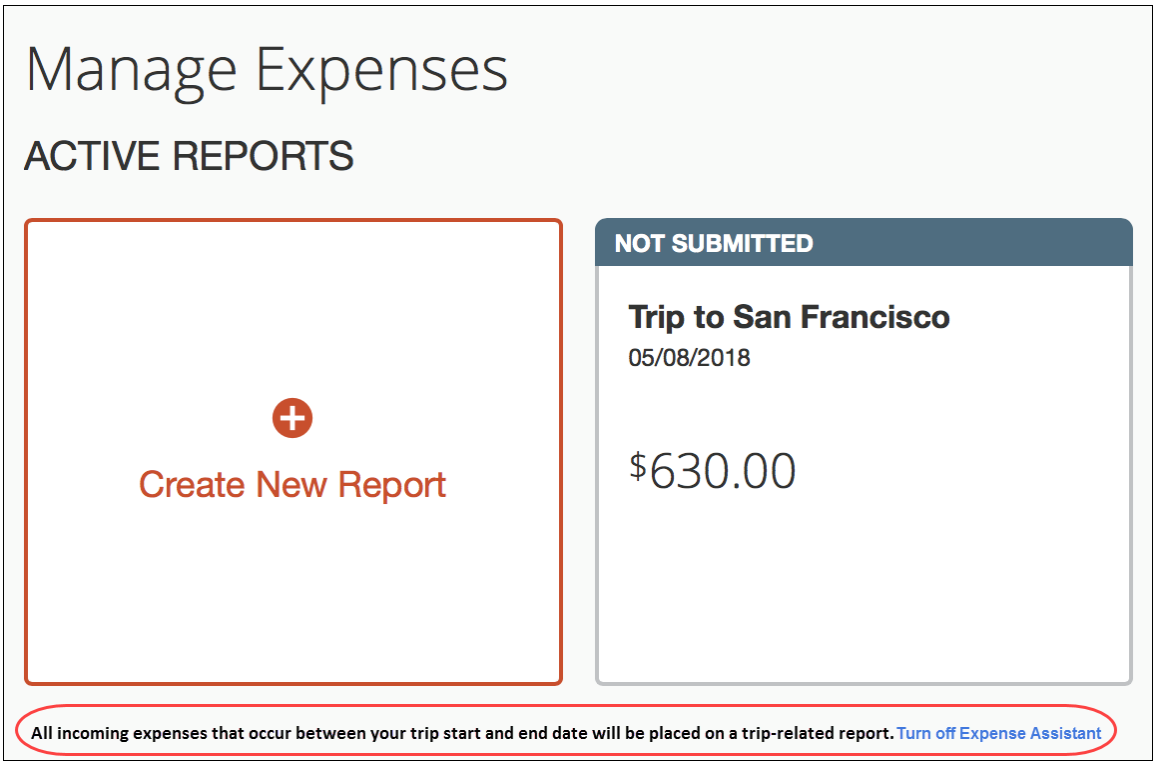
If the user is using the existing UI (has not yet moved to NextGen Expense), and the setting is *Monthly or By Trip* or *Trip Only*, users will need to enable trip-based Expense Assistant for themselves.

There is one way a user can enable Expense Assistant: from Profile.

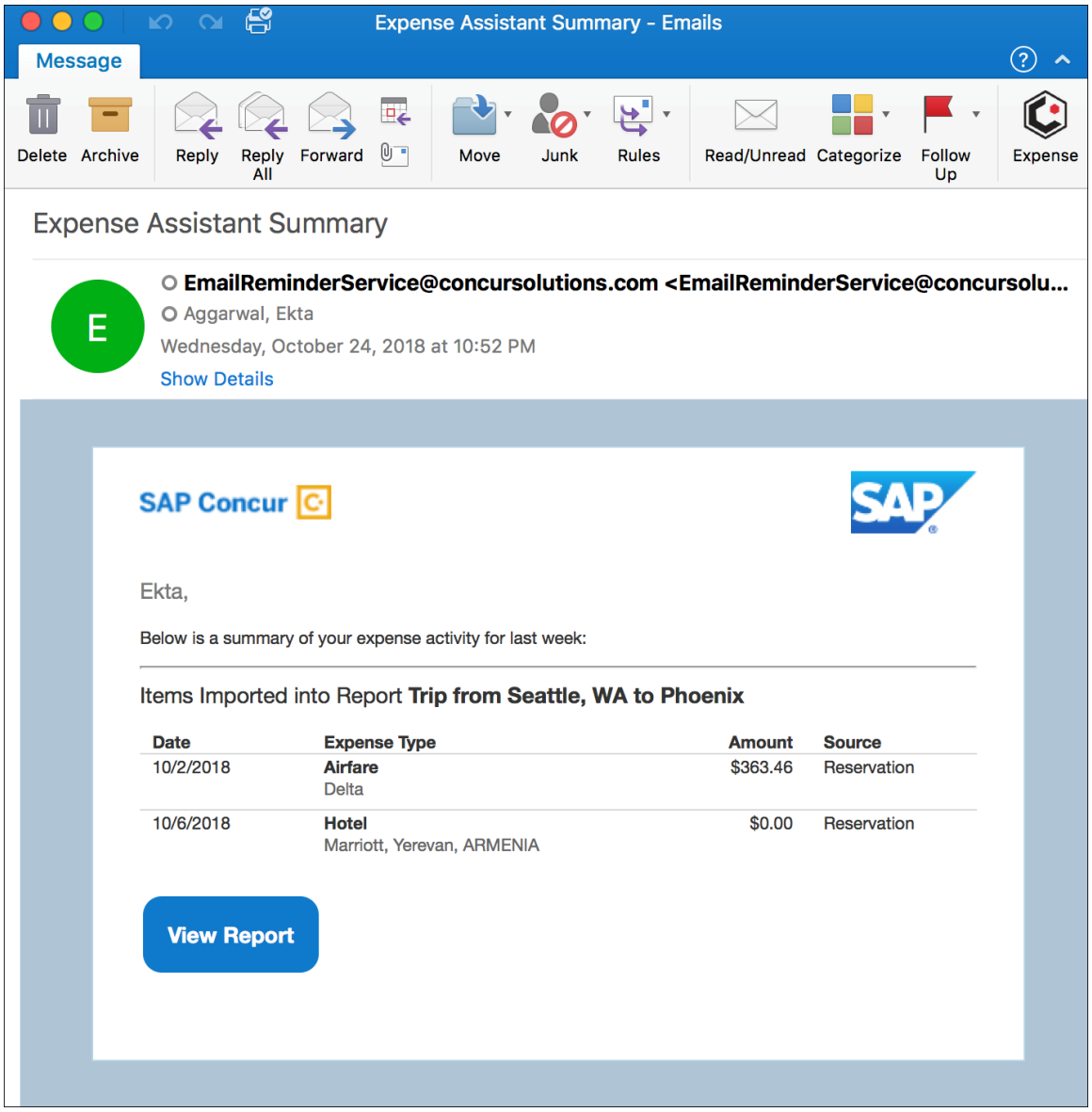
On the **Expense Preferences** page (Profile > Profile Settings), users select from the **Expense Assistant using this method: [list of available options]** list, and then click **Save**.



Once enabled by a user, for trip-based Expense Assistant, the following message appears and confirms that feature is on: "**All incoming expenses that occur between your trip start and end date will be placed on a trip-related report. Turn off Expense Assistant.**"



Since trip-based expense assistant may create expense reports at different times each month, Concur Expense sends the user a summary email when a trip-based expense report is created (if prior to trip start date). After that, Concur Expense sends a weekly email that summarizes the activity that occurred in the auto-created expense report after the trip began.



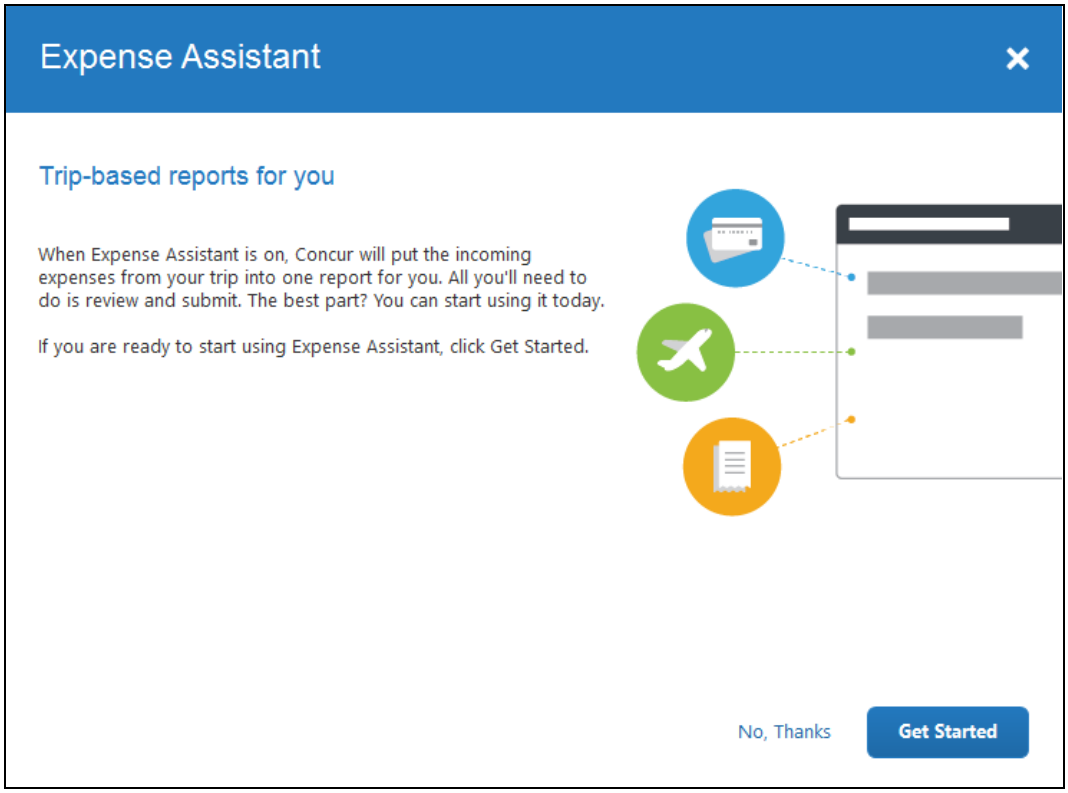
What the User Sees – NextGen Expense

ENABLE EXPENSE ASSISTANT

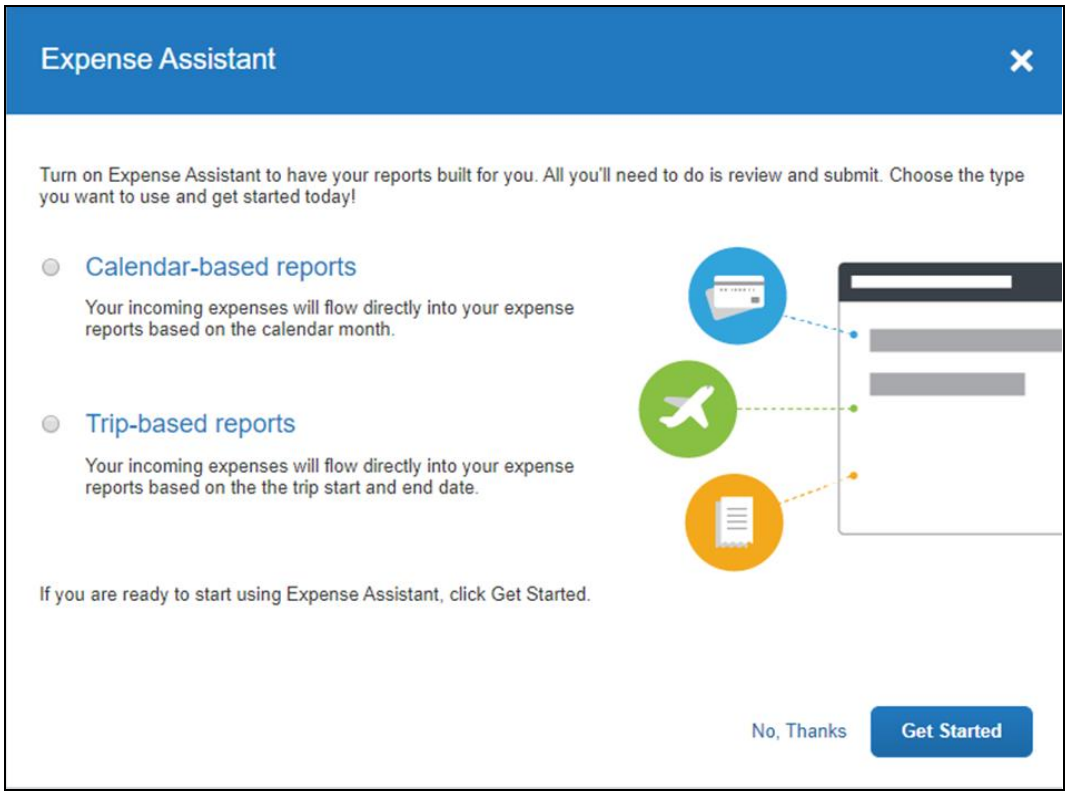
If the user is using NextGen Expense and if the user has at least one unexpensed travel segment (itinerary) in **Available Expenses**, the **Expense Assistant** page appears.

There are three ways a user can enable Expense Assistant: when they have Available Expenses, whether or not they have any Available Expenses, and from Profile.

- When your users log on to Concur Expense and go to the Expense home page, they will see the following screen. Since Concur Expense needs some available expenses and an unexpensed travel segment (itinerary) present to show how it works, this will show at the first time the user logs in and has available expenses to be used.
  - If the admin selected *By Trip only* in the **For Expense Assistant, allow users to opt out or to use** list, then the **Expense Assistant** page that appears allows the user to select whether or not to use the feature.

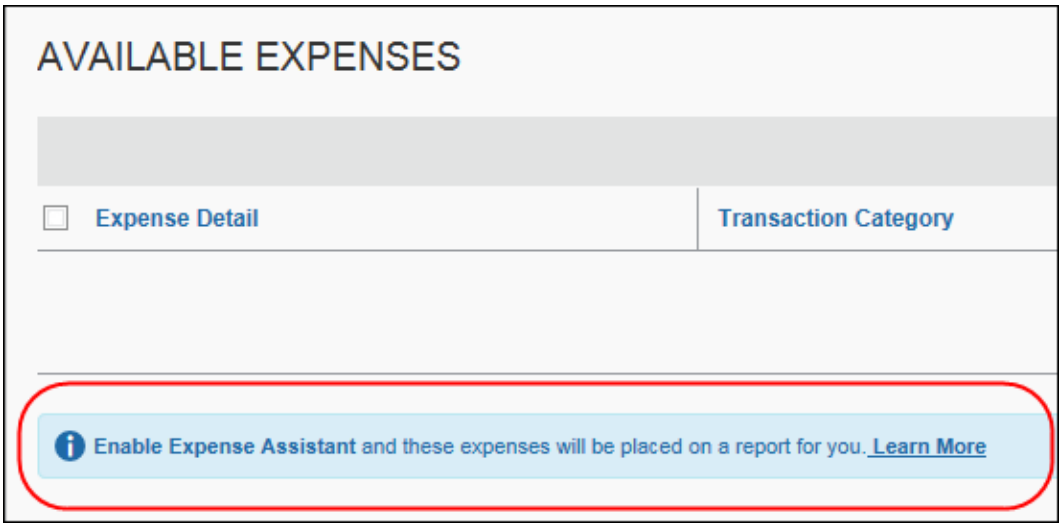


- If the admin selected *Monthly or By Trip* in the **For Expense Assistant, allow users to opt out or to use** list, then the **Expense Assistant** page that appears allows the user to select trip-based, calendar-based, or neither.



-Or-

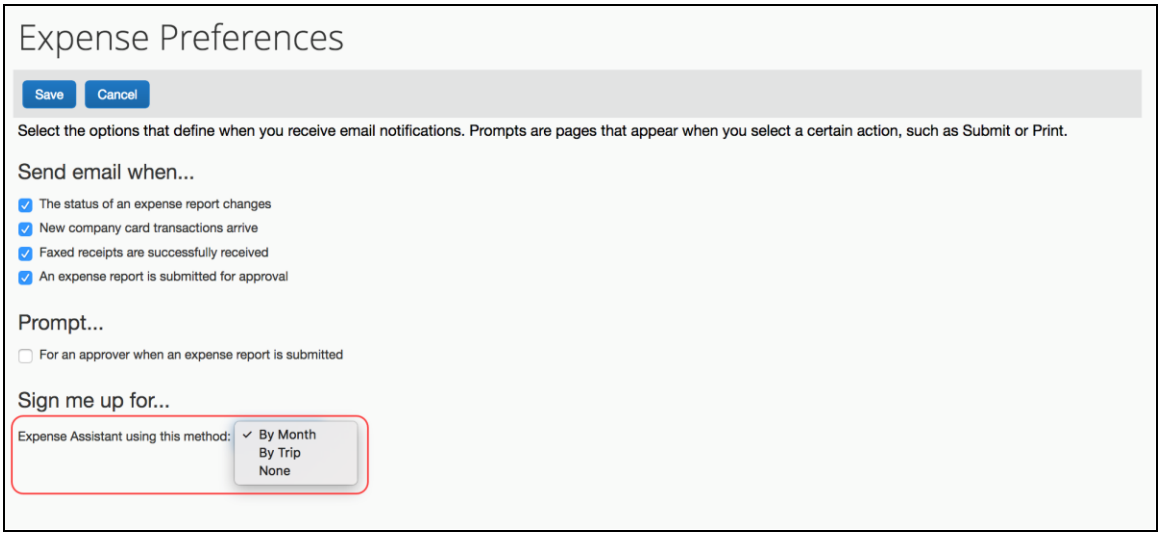
- If users do not currently have any available expenses or an unexpensed travel segment (itinerary), they will see the following message in the **Available Expenses** section:



The users need to click **Learn More**, and then click **Try it Now** to begin using Expense Assistant.

-Or-

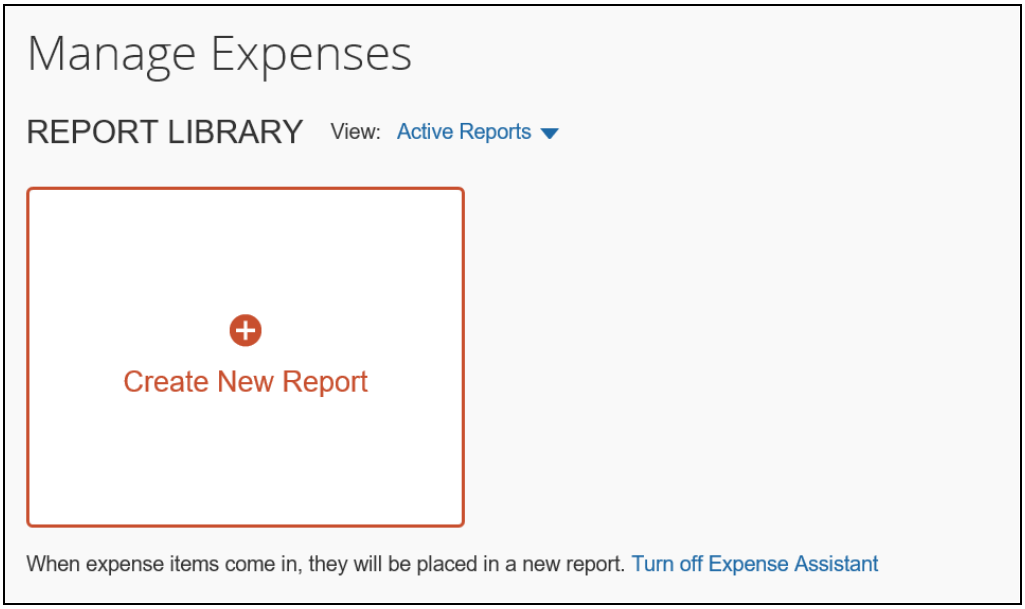
- If the user wants to enable Expense Assistant and the pages shown above do not appear automatically, the user can enable the feature in Profile. On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects *By Month* or *By Trip* from the **Expense Assistant using this method** list, and then clicks **Save**.



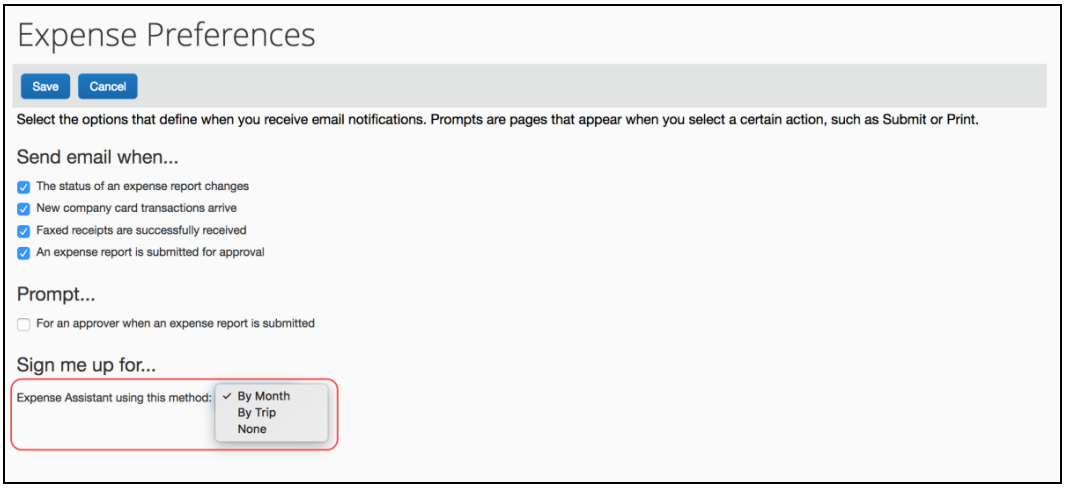
Disable Expense Assistant

The user can disable Expense Assistant two ways:

- On the **Manage Expenses** page, the user clicks **Turn Off Expense Assistant** below the report library.



- On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects *None* from the **Expense Assistant using this method** list, and then clicks **Save**.



Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, *Monthly or By Trip* is automatically selected (enabled) on the **Compliance Controls – Compliance Rules** page for the company, making the feature available to your users.

ALREADY IN USE

For example, if you use Expense Assistant today, *Monthly only* will be selected in the **For Expense Assistant, allow users to opt out or to use** field on the **Compliance Controls – Compliance Rules** page.

NOT CURRENTLY IN USE

For example, if you use Expense Assistant today, *None* will be selected in the **For Expense Assistant, allow users to opt out or to use** field on the **Compliance Controls – Compliance Rules** page.

NEW CLIENTS

Again, for new clients, *Monthly or By Trip* is automatically selected (enabled) on the **Compliance Controls – Compliance Rules** page for the company, making the feature available to your users.

📖 For more information, refer to the *Expense: Expense Assistant Setup Guide for Standard Edition*.

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Admin Sees

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

What the User Sees

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

Configuration / Feature Activation

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

Next Generation (NextGen) Expense

Ongoing New User Interface for Concur Expense End Users

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

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

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

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

  Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense:** ***All customers will be required to move to NextGen Expense***. This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

  Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

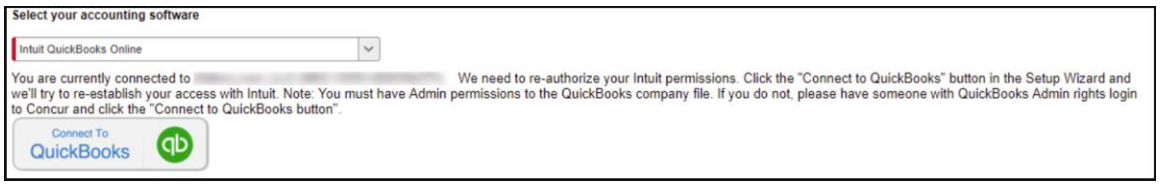
QuickBooks

Update QuickBooks Online Integration Authorization

Overview

SAP Concur has updated the authorization process for the QuickBooks Online integration to allow clients to re-enter their QuickBooks Online credentials if they have received a re-authorization prompt.

WHAT THE ADMIN SEES



BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows the administrator to re-enter their QuickBooks Online credentials without disconnecting from and reconnecting to SAP Concur.

Configuration / Feature Activation

This change is automatically on; no additional configuration or feature activation is 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.

Admin

Planned Changes Archive Deactivated User Data

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet customer expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for ***at least three years***. The archive process moves this "deactivated" user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

USER / CUSTOMER BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for inactive user's personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that customers are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

A. SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

A. SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – they have been "marked inactive" in the SAP Concur system. A user must be deactivated for ***over 3 years*** without having been re-activated in order to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

A. ***For Professional Edition***, the most significant difference would occur in **Company Admin > User Administration**.

However, once user information is archived:

- From within User Administration, if the **Use Travel Advanced Filters** option is chosen, the user will not be visible.
- From within User Administration, if the **Use Expense Advanced Filters** option is chosen, you will be able to see the user in search results as deactivated.
    - If you click the user's name, you will receive an error message: *The selected user exists in the Expense or Invoice application but the user contains conflicting or missing data. Contact SAP Concur support to request help in resolving this error.*
    - If you click the icon in the **Profile** column, you will receive the generic error message.
    - If you click the user's login ID, you will see no historical login information for that user.

- If another user has the Self-Assigning Assistant permission or the user is a Proxy who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive an "switching user" error message.
- From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- These users will not have access to any of their past travel history.
- For Expense, the user would have access to their expense history if:
  - That history has not been removed by a Data Retention policy.
  - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

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

Planned Changes New SAP Concur Sign In Page

Overview

SAP Concur is planning to add a new **Sign In** page, providing an updated login experience for users who log in with a user name and password credentials. Current Single Sign-On (SSO) users will log in without having to enter additional credentials. This feature is planned for 2019.

The new **Sign In** page feature includes the following:

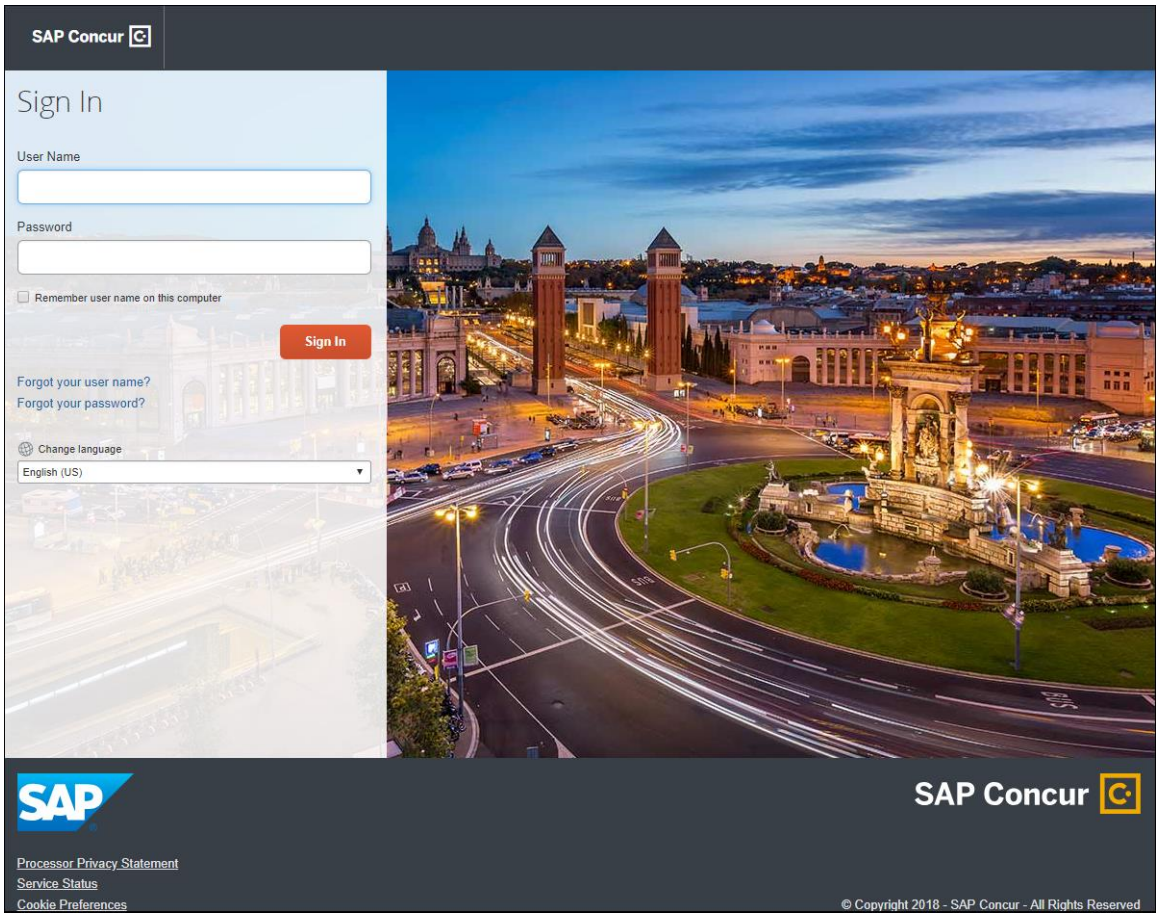
- **Two-step login:** provides enhanced security, meets current industry standards, and provides a better login success rate
- **Multi-account login:** allows administrators to log in with multiple accounts
- **Password hint removal:** provides better security for users and SAP Concur
- **User avatar:** enhances the user experience (planned for a future release)

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security and a faster, convenient experience for users logging in to SAP Concur products and services.

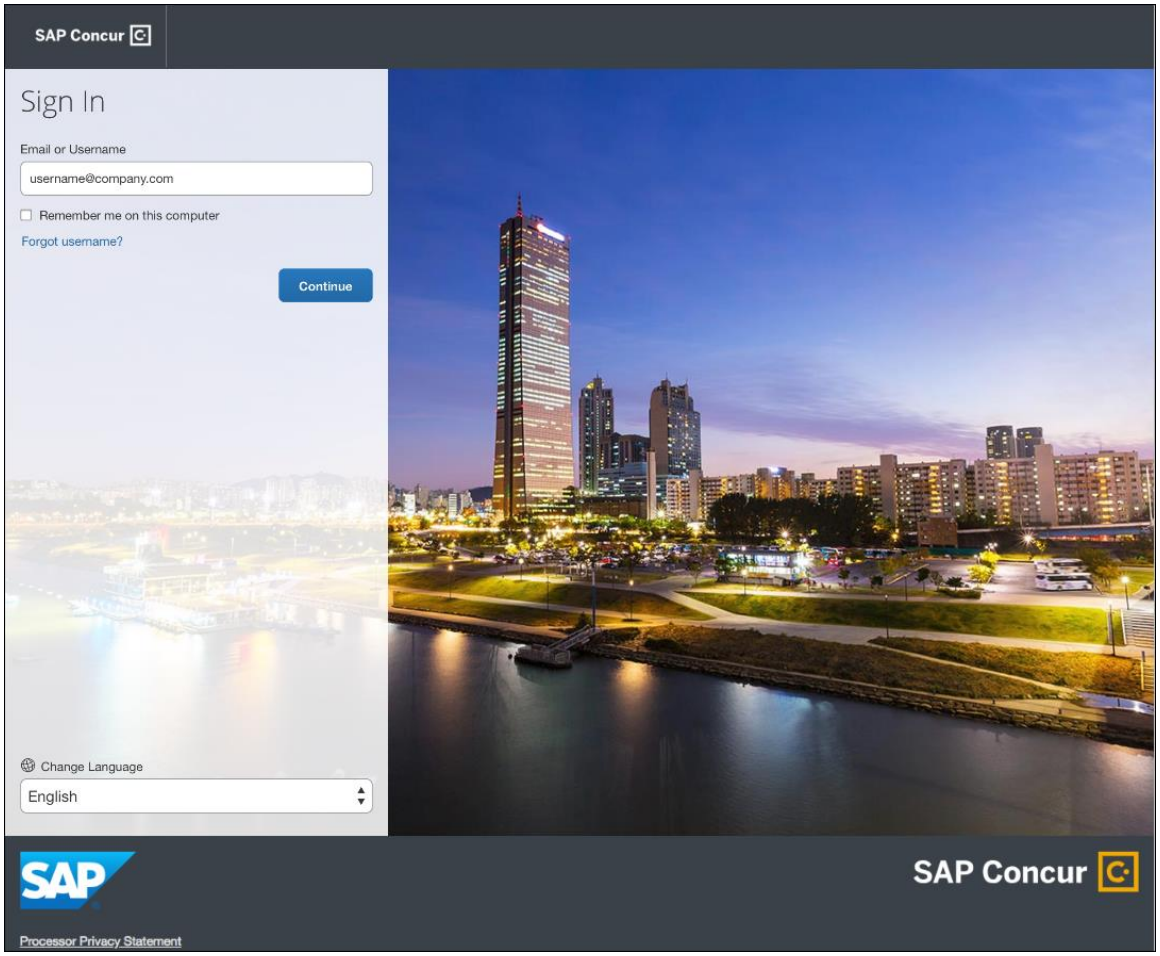
What the User Sees – Current Sign In Page

The SAP Concur **Sign In** page currently appears with **User Name** and **Password** fields, and a **Sign In** button. Once a user is authenticated, the SAP Concur **Home** page appears.



What the User Sees – New Sign In Page

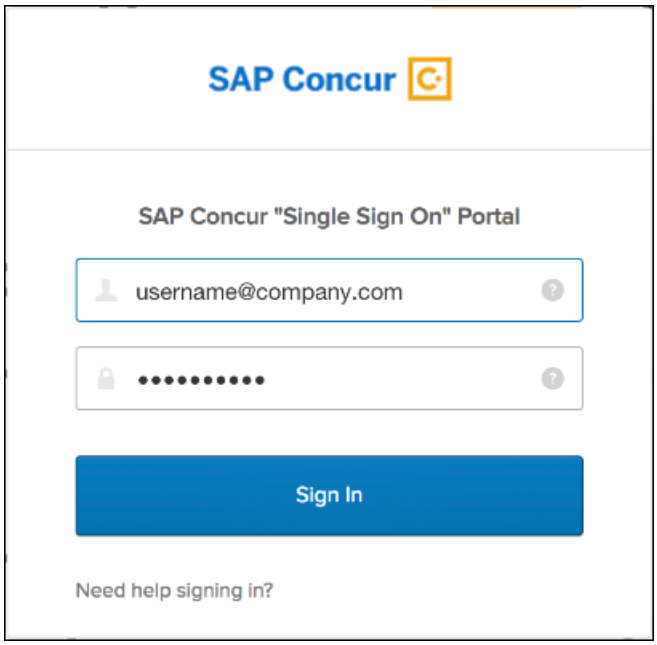
The new SAP Concur **Sign In** page will have an **Email or Username** field and a **Continue** button. The user will type in their email or username. The user can select the **Remember me on this computer** check box, so their email or username displays the next time they log in to SAP Concur. The user will then click **Continue**.



Depending on the customer's implementation of SAP Concur, users will then be directed to the designated Identity Provider (IdP) Single Sign-On portal or an additional **Sign In** page.

SSO Users

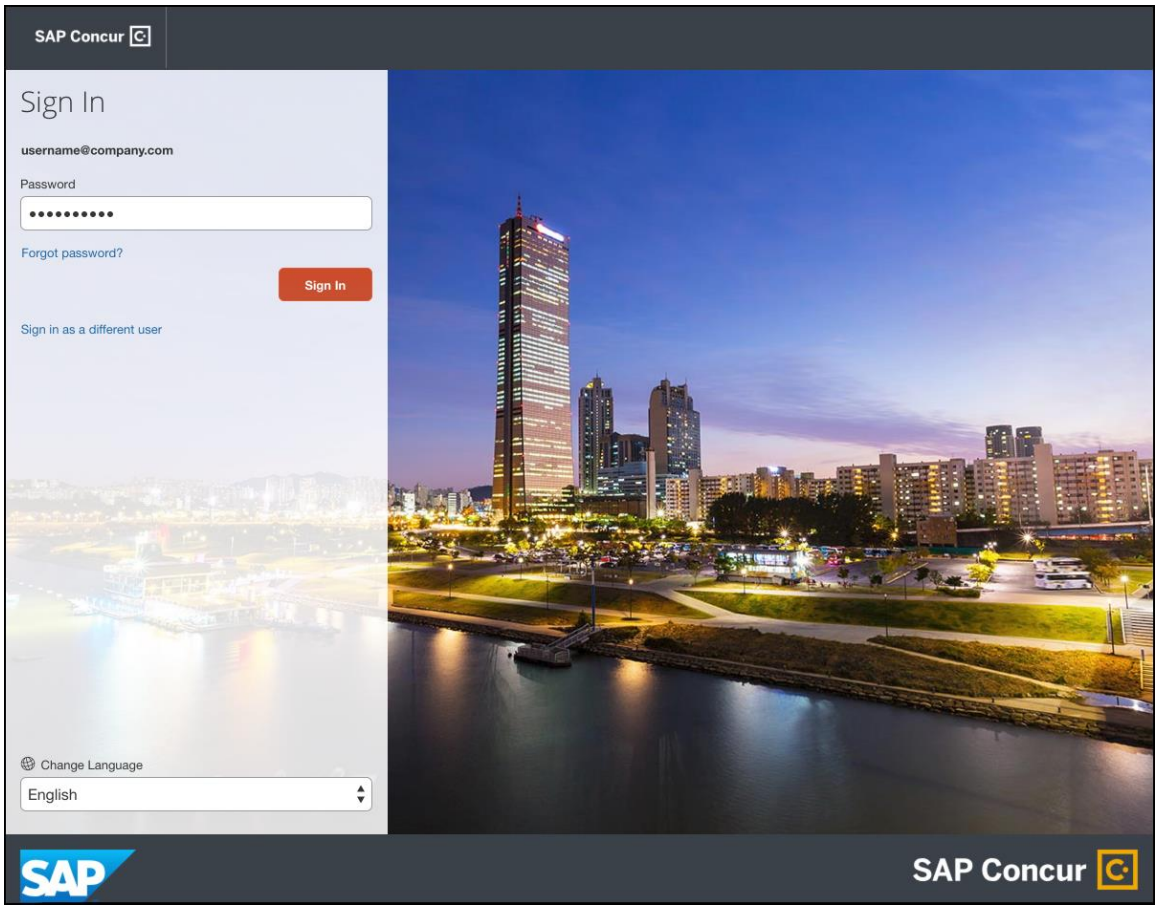
When the designated Identity Provider (IdP) Single Sign-On portal appears (similar to the one shown below), the user will enter their email or username and password, then click **Sign In**.



After being authenticated, the user will be directed to the SAP Concur **Home** page.

Users with Usernames and Passwords

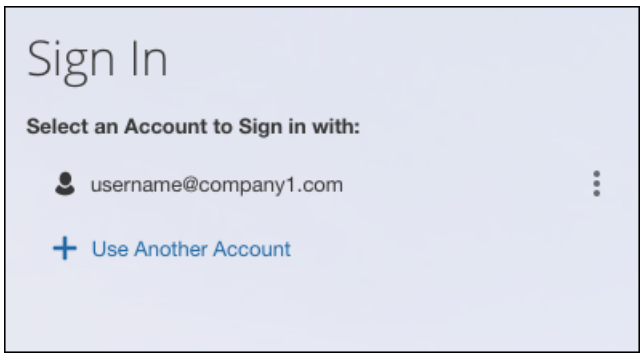
The user will be directed to an additional **Sign In** page. The user will enter a password and click **Sign In**. The system will then authenticate the user's credentials.



Once the user's password is verified, the SAP Concur **Home** page appears.

Return Users

If a returning user selected the **Remember me on this computer** check box during their initial login session, they will see their email or user name display on the **Sign In** page. Users who did not select the **Remember me on this computer** check box will log in as they did initially.



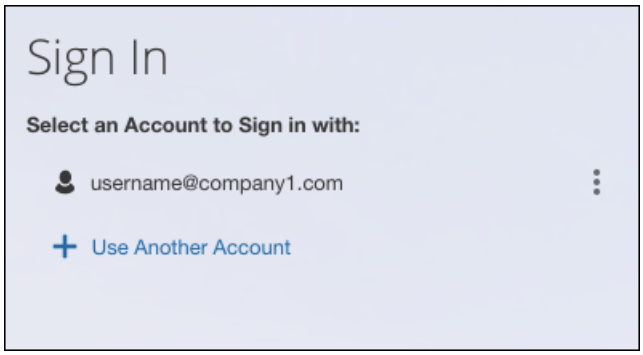
The user will click on their email or username, and then one of the following occurs:

- **SSO Users:** The user will be directed to the SAP Concur **Home** page.
- **Users with Usernames and Passwords:** On the **Sign In** page, the user will enter as password and then click **Sign In**. The user will then be directed to the SAP Concur **Home** page.

Users With Multiple Accounts

SAP Concur users with multiple login accounts have more than one login option depending on the user role or account they want to use. The user will first log in to SAP Concur using one of their accounts. Once successfully logged in, the user logs out of the system.

To add another account, on the **Sign In** page, the user clicks the **Use Another Account** link.

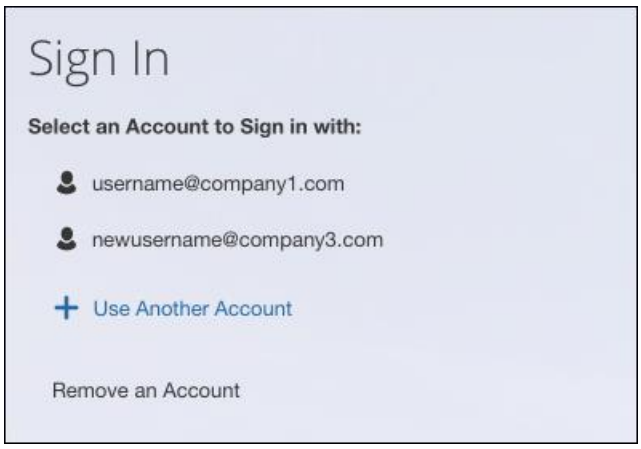


The next login step depends on the account type the user wishes to use:

- **SSO Account:** If the user selects an account with SSO credentials, the user will enter an email, then the user will be directed to the IdP Single Sign-On portal. Once the user is authenticated, the SAP Concur **Home** page appears.

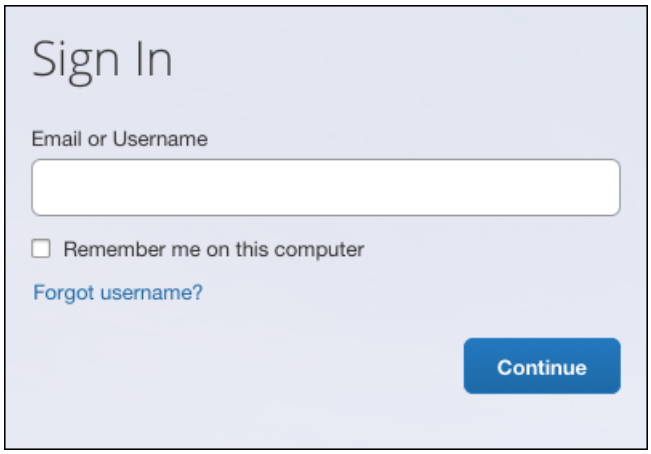
- **Username and Password:** The user is directed to an additional **Sign In** page to enter a password. The user then clicks **Sign In**. Once the user is authenticated, the SAP Concur **Home** page appears.

When all accounts are added, a return user will select the account they want to use to log in to SAP Concur.

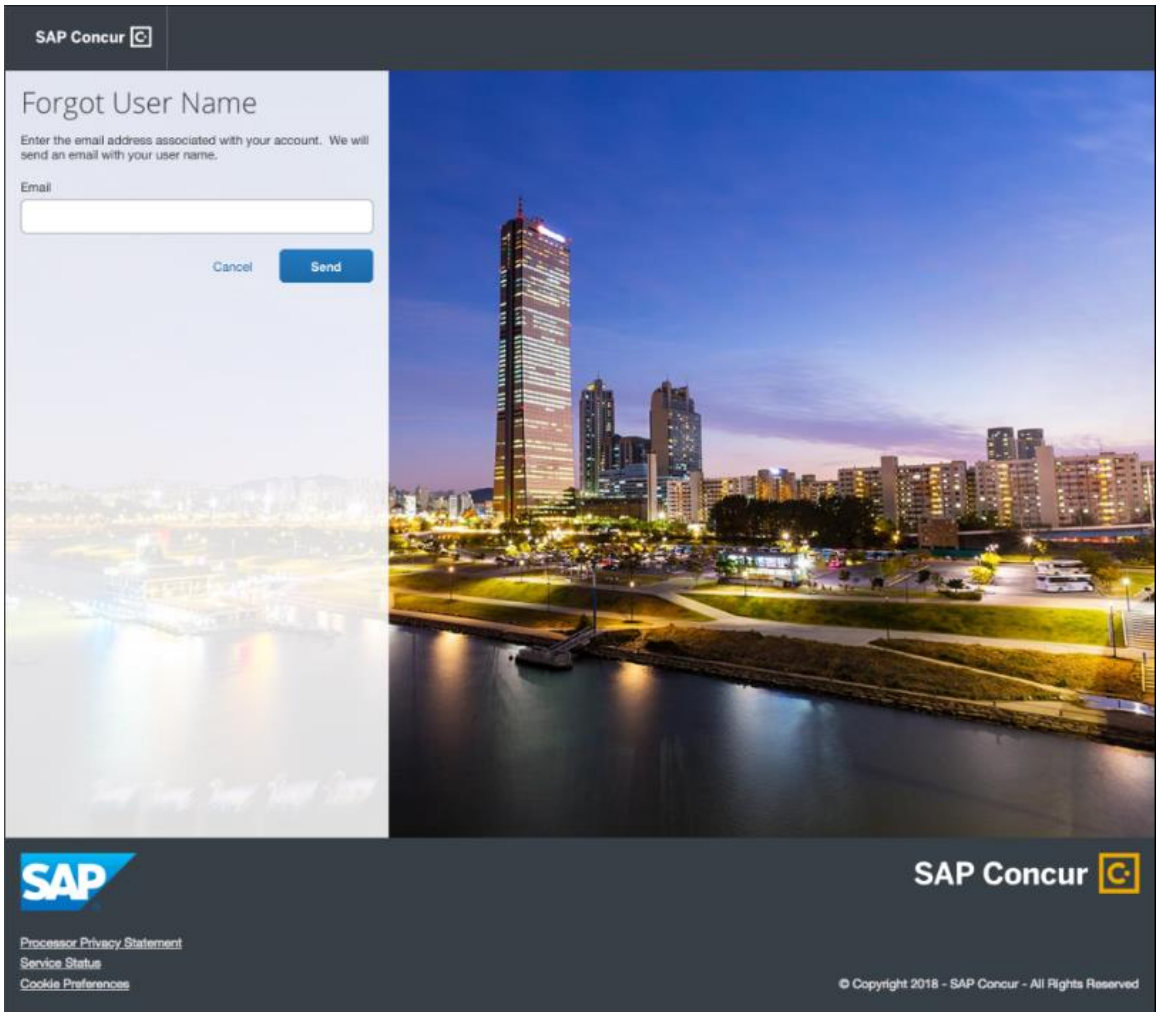


Forgot User Name

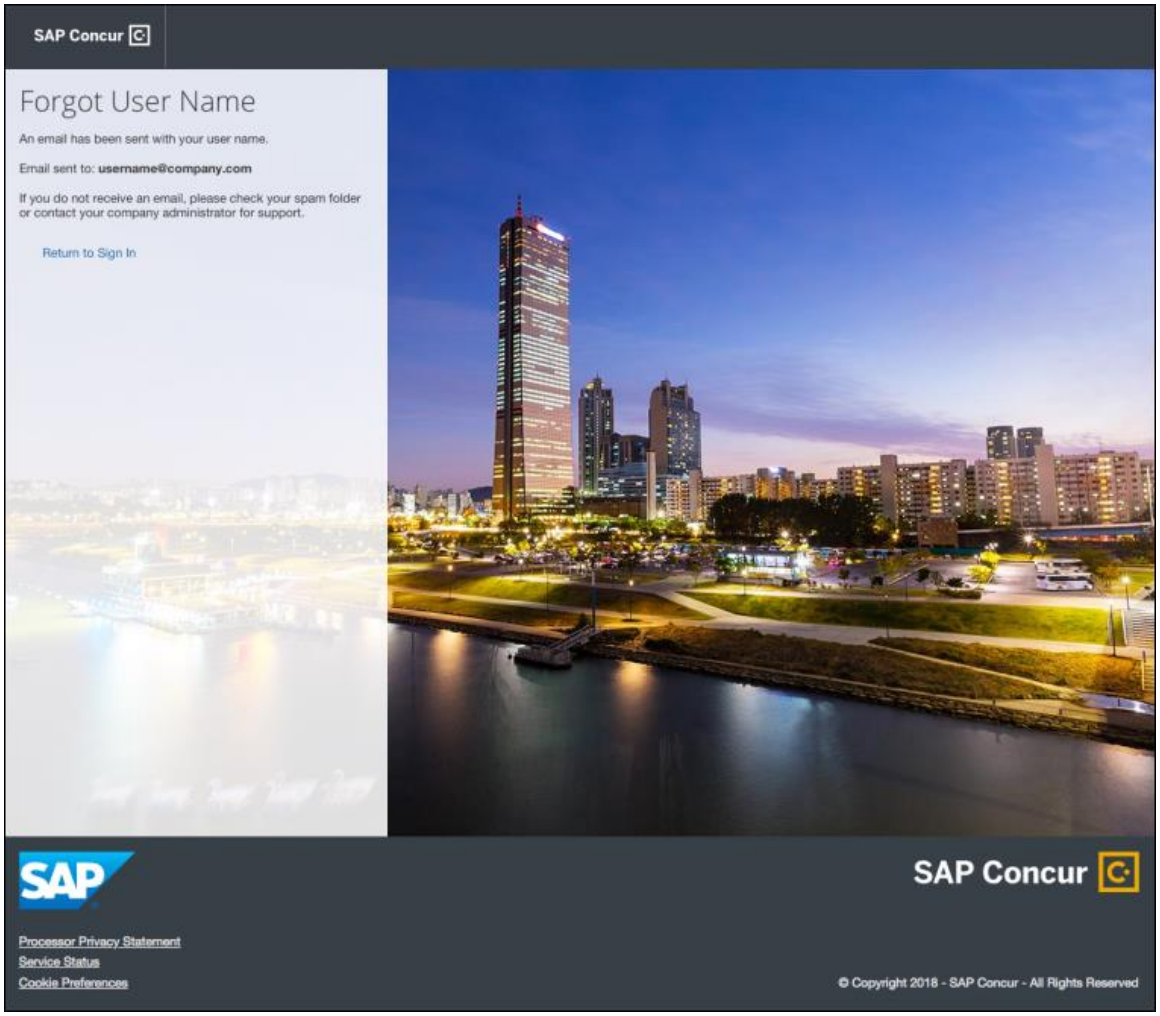
If a user forgets their user name, the user will click the **Forgot username?** link on the **Sign In** page.



Next, the **Forgot User Name** page appears, and the user will enter their email and click **Send** to have an email sent to a verified email account. This email will contain their user name.



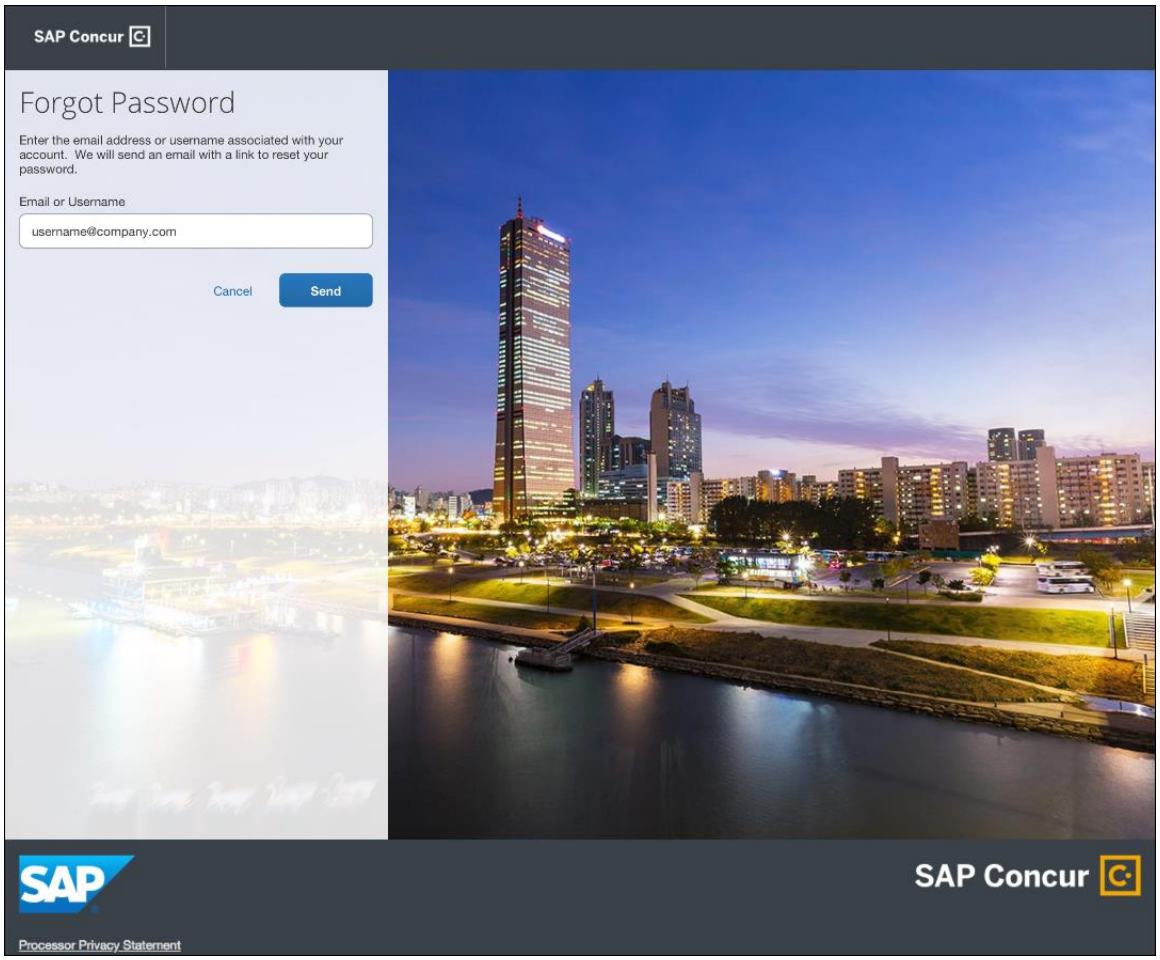
The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



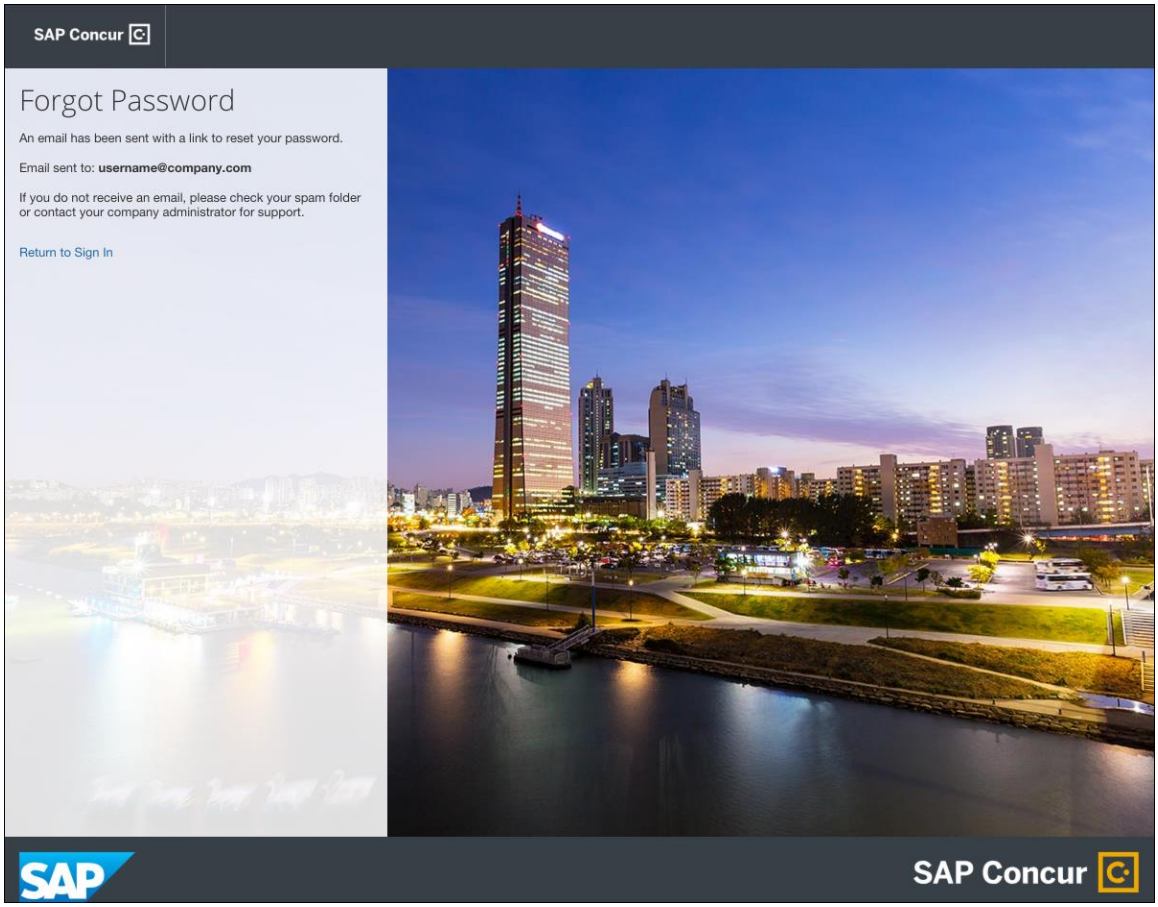
INVALID PASSWORD

If a user forgets their password, an on-screen message will appear alerting the user. The user will then click **Send** to have a password reset email sent to their verified email account.

SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.



The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



Configuration / Feature Activation

Configuration information will be provided in a future release note.

Budget

Planned Changes Workflows for Budget

Overview

In a future release, workflows will be available for Budget. Workflows define how the system routes invoices, expense reports, and requests through approval and processing steps. SAP Concur's flexible workflow feature for Budget allows companies to design workflows specifically tailored to their unique needs.

Without budget review, budgets may become fully consumed well before the end of a period or year leaving an organization with limited options and budget owners with, for example, exceeded budgets. In addition, early spending means that more

important (to the organization) spending will be declined because lesser important spending consumed the budget early on.

Combining budget review in the workflow adds value. Audit rules and workflow step rules can help organizations to add in controls when it makes sense to fine tune to an organization's specific needs.

Equally important is the determination when a spending item is regarded as committed toward a budget. In most organizations, the commit is when a spending item is paid; it went through most if not all approval steps. In other organizations, the commit occurs much earlier. As soon as a purchase request or an authorization request is approved it is regarded as "promised".

BUSINESS PURPOSE / CLIENT BENEFIT

This feature will provide clients with control over the budget spend to, for example, avoid exceeded budgets too early in a budget period or budget year.

Configuration / Feature Activation

The administrator needs to configure this feature on the **Approval Routing** page.

To access the Approval Routing page:

1. Click **Administration** > **Invoice Settings** or **Expense Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice* or *Expense* depending on the product you are working with.
3. In the **Policy** section, click **Show Advanced Settings**.
4. Click **Invoice Approvals**, **Expense Approvals**, or **Purchase Request Approvals**.

Expense Pay – Global

Planned Changes (USD) New Payment Processing Partner: WUBS

Overview

Public sector clients will be able to use Western Union Business Solutions (WUBS) to process their United States Dollar (USD) payments.

The Expense Pay – Global product functions the same way regardless of which payment-processing partner your funding account is configured to use. What is different about WUBS compared to Bambora (or classic Expense Pay) is how your funding accounts are setup in Concur Expense. Each payment-processing partner has

unique forms that must be completed, submitted, and approved as part of the onboarding process.

NOTE: Company cards supported for payment-processing partners are not partner-specific.

BUSINESS PURPOSE/CLIENT BENEFIT

This additional payment-processing partner increases the value of our Expense Pay – Global offering.

What the Admin Sees

When enabled, you may create a new WUBS global funding account. The user interface will display an imbedded WUBS onboarding application form. Western Union retains control over the design and maintenance of the onboarding application form.

EXAMPLE

Funding Account

Western Union Business Solutions Registration

Navigation and Status

Business Information

** or ** indicates a mandatory field*

Information About You

I wish to submit an application for a:*

Choose One...

First Name:*

Middle Name:

Please provide if applicable.

Last Name:*

Date of Birth:*

Your Residential Address:*

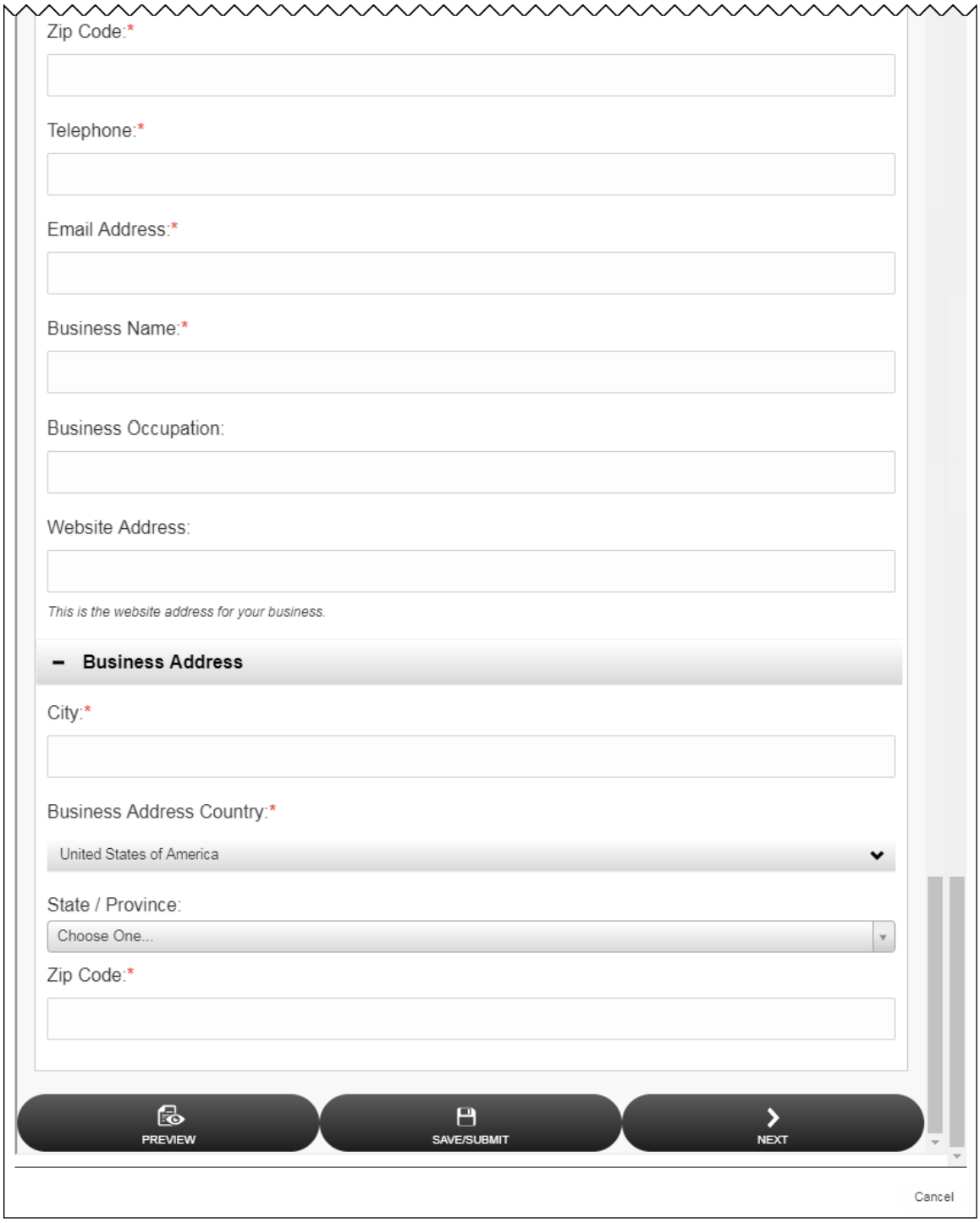
City:*

Residential Address Country:*

United States of America

State / Province:*

Choose One...



What the User Sees

Users will see no difference in Profile. The **Bank Information** page in Profile is the same for Bambora and WUBS.

Configuration / Feature Activation

To request this feature, contact Concur Client Support.

Product Settings

Planned Changes Cost Tracking to Have New Look, New Name – Targeted for End of November

Overview

The **Cost Tracking** page in Product Settings will soon have a new look and flow, and a new name. All existing functionality remains with improved usability for field setup and management.

This feature is targeted to release on November 27, 2018.

The new enhancements will include the following:

- The **Cost Tracking** page will be renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page will allow client admins to manage custom fields starting from one page. **Linked Lists** will be renamed to **Multi-Level Lists**.
- A new **Add New Field** page will be accessible from the **Manage Custom Fields** page. The **Add New Field** page will allow client admins to create fields by selecting the field's type and then selecting field options. Client admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.
- Admins can create up to 12 custom fields, which can be created by typing in a custom field name or choosing from a list of suggestions. Previously, a maximum of 12 custom fields were allowed, but only six could be fields created by typing in a custom field name with the rest having to be chosen from the selected list.

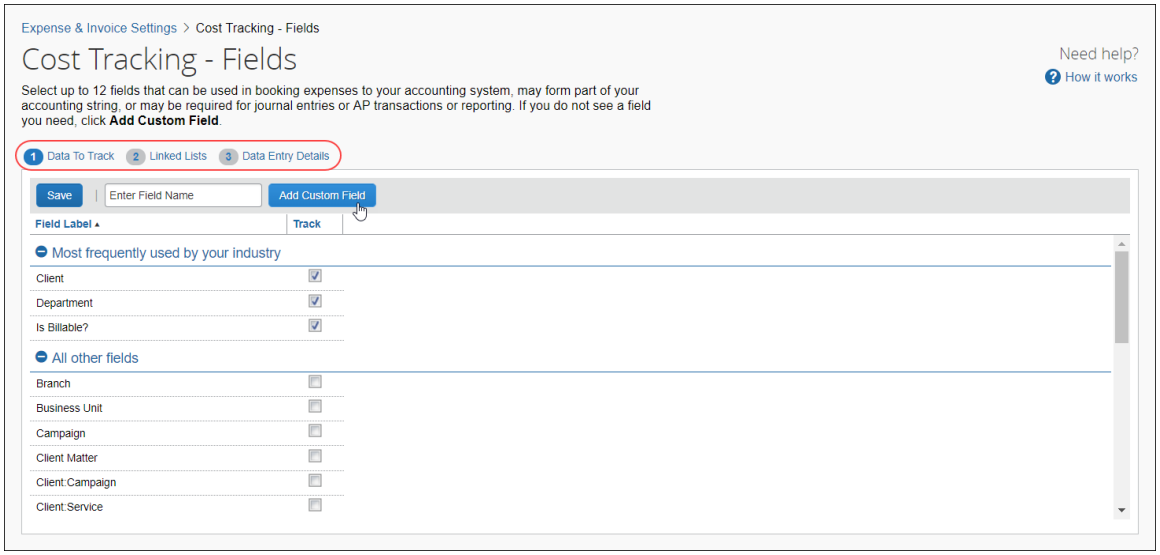
BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end user experience.

What the Admin Sees

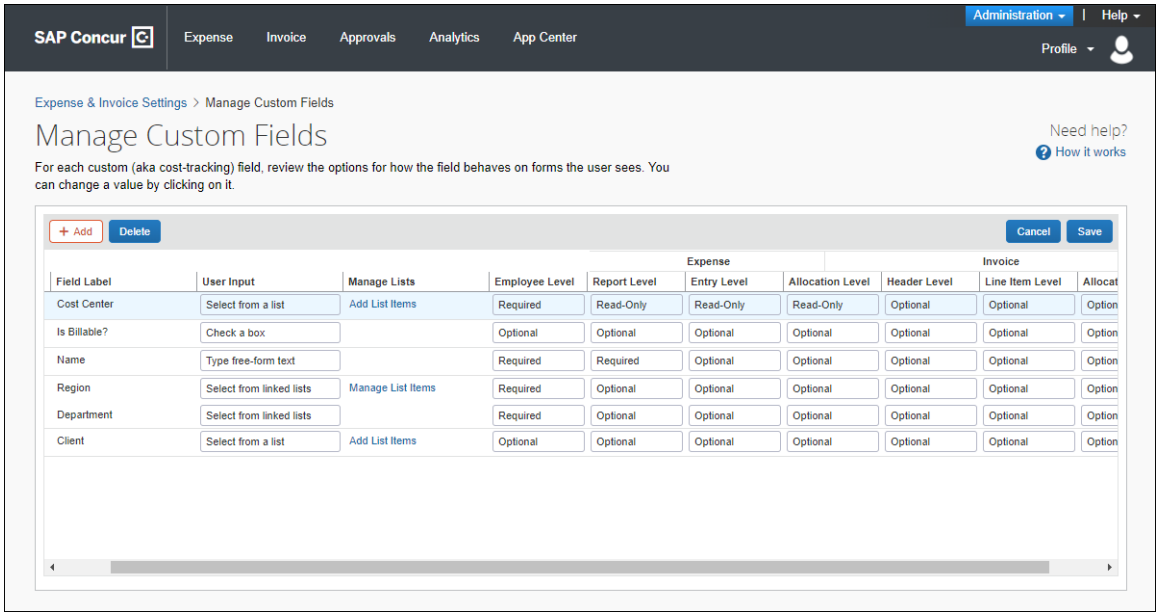
BEFORE

The existing **Cost Tracking – Fields** page included three field management tabs: **Data To Track**, **Linked Lists**, and **Data Entry Details**.



AFTER

The client admin will see the existing **Data Entry Details** page, which has been renamed **Manage Custom Fields**. There will be new buttons to add and delete custom fields, replacing functionality previously located on the **Select Fields** page.

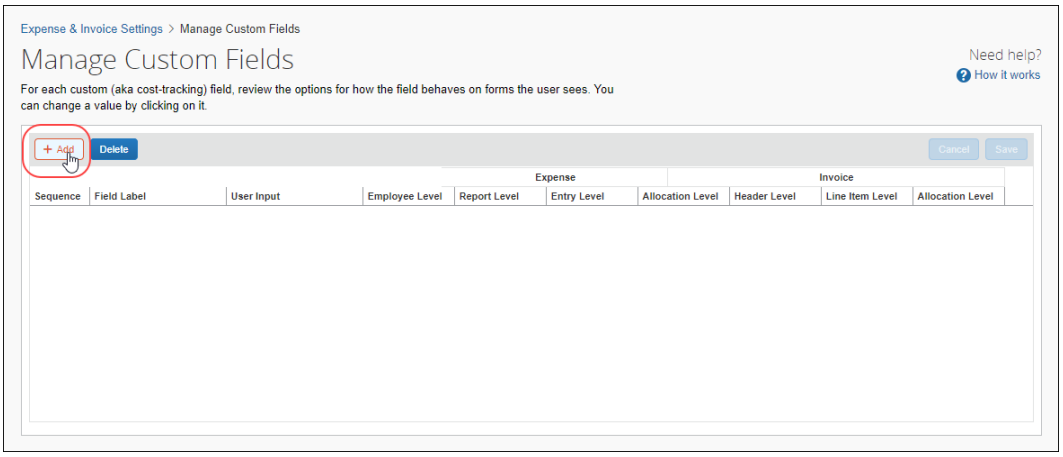


ADD NEW FIELDS

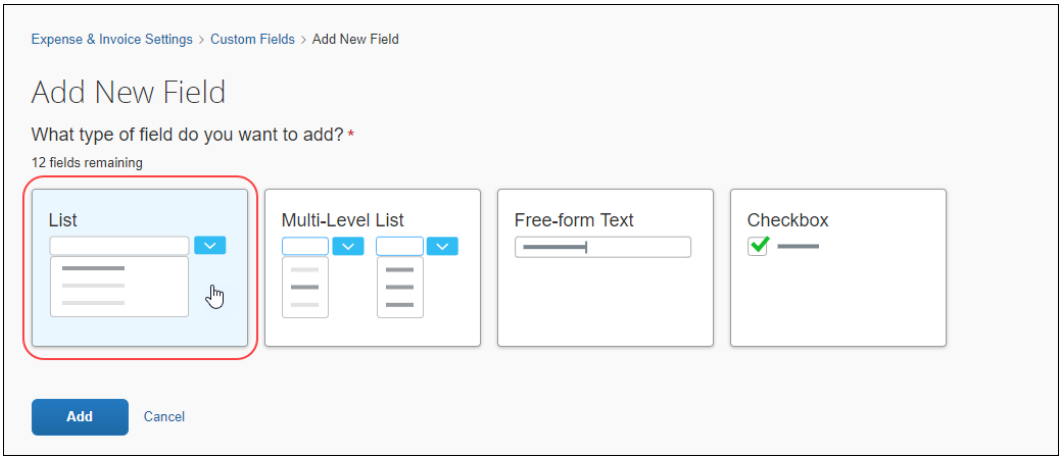
On the **Add New Field** page, client admins will be able to create the following field types: list field, multi-level list (composed of two or more levels), free-form text, or a check box. Admins will be able to create up to 12 custom fields, which can be created by typing in a custom field name or choosing from a list of suggestions.

To add a new field:

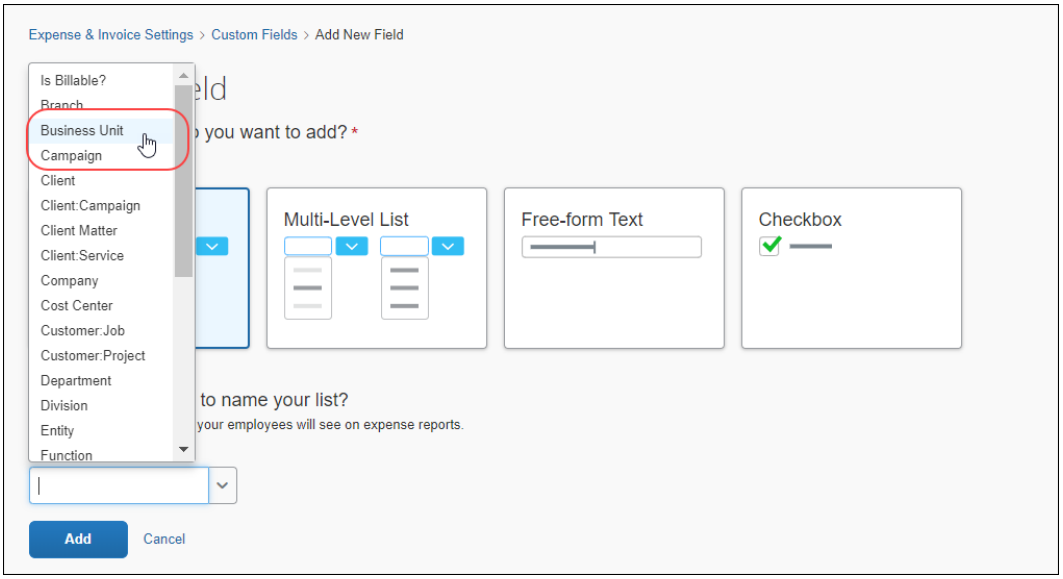
1. On the **Manage Custom Fields** page, click **Add** to access the **Add New Field** page.



2. Click on the type of field you want to create.

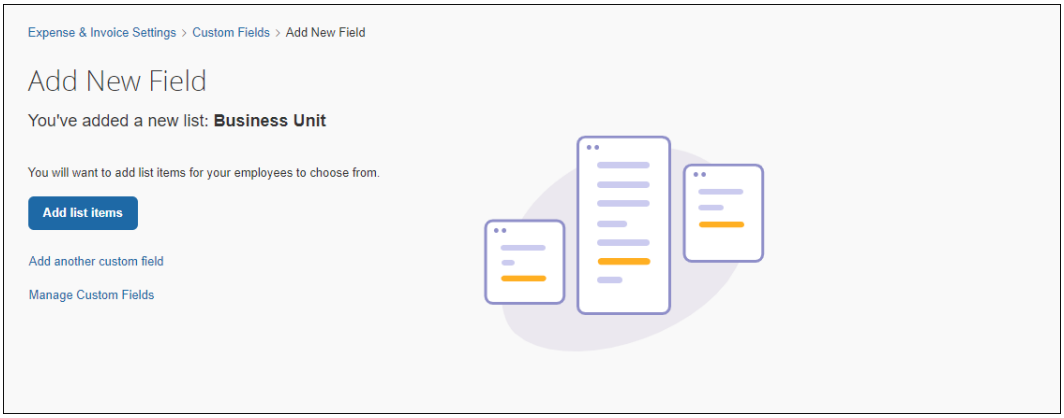


3. In the **What would you like to name your list?** section, in the **Field Name** list, select or type in a field name to use as a label when the field is displayed.



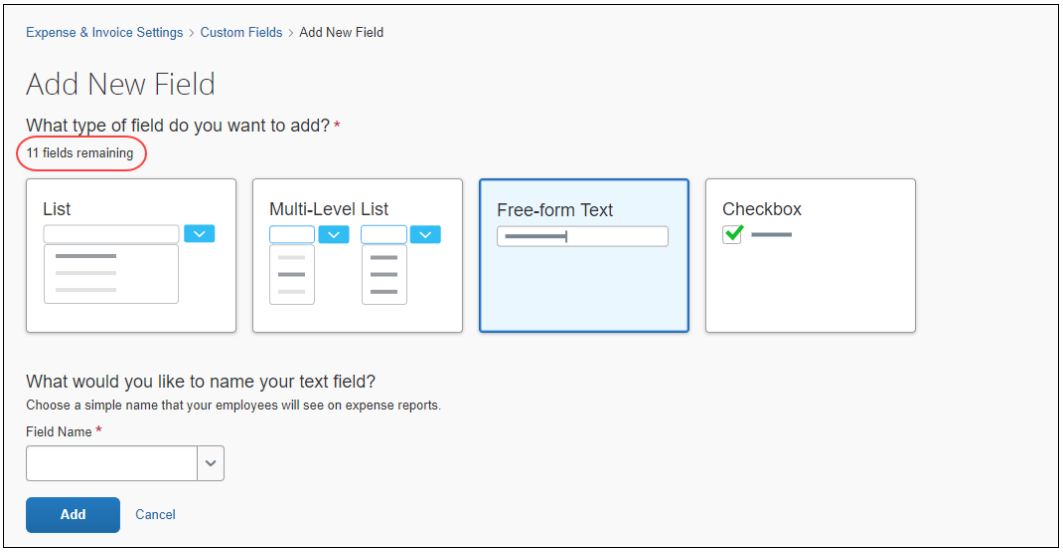
4. Click **Add**.

5. A message confirms the addition of the new field.



6. You can now choose to add list items, add another custom field, or return to the **Manage Custom Fields** page.

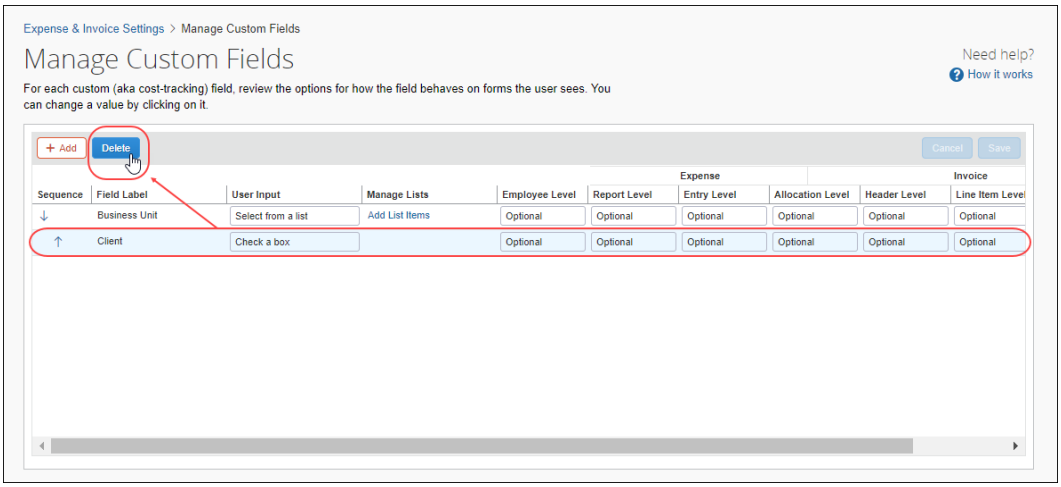
7. If you choose to add another new field, an on-screen message appears noting how many available custom fields you have remaining.



DELETE FIELDS

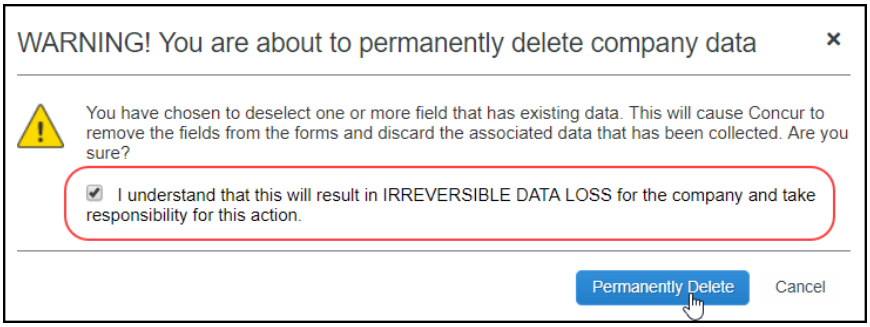
To delete a field:

1. On the **Manage Custom Fields** page, select the field you want to remove.



2. Click **Delete**.

3. In the message box, select the check box to agree to the terms of removing the fields.



4. Click **Permanently Delete** to remove the field.

Configuration / Feature Activation

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

For more information, refer to the *Shared: Cost Tracking Setup Guide*.

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur Standard Editions of Expense, Invoice, Travel, and Request to provide clients with a self-service option for setting up SSO for their organization.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Access To Concur** section of Product Settings.

- Single Sign-On can be managed for Standard Travel if it is bundled with Expense, Invoice, and/or Request.
- For standalone Standard Travel, the Manage Single Sign-On feature will be accessible from the **Travel Settings** page.

Other SAP Concur products and services are outside the scope of this initial release.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides a self-service option for setting up SSO.

Configuration / Feature Activation

More information will be coming in a future release note.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

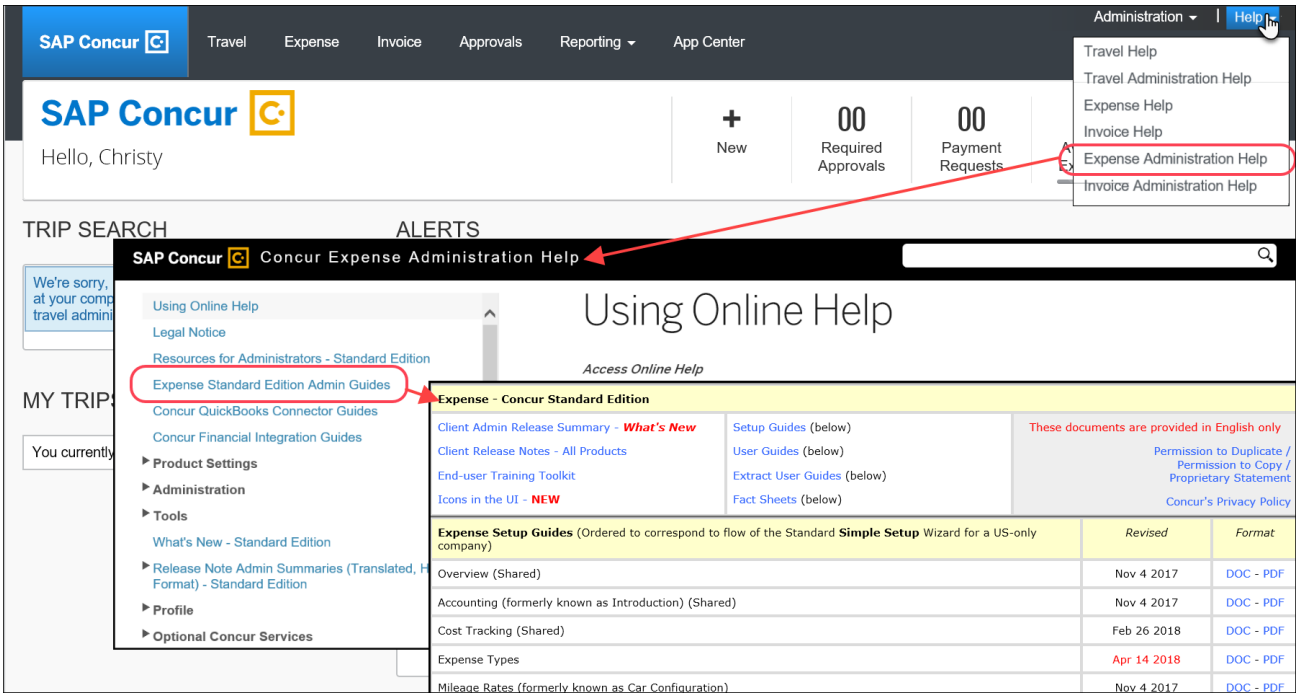
The list of non-affiliated subprocessors is available here: SAP Concur list of Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

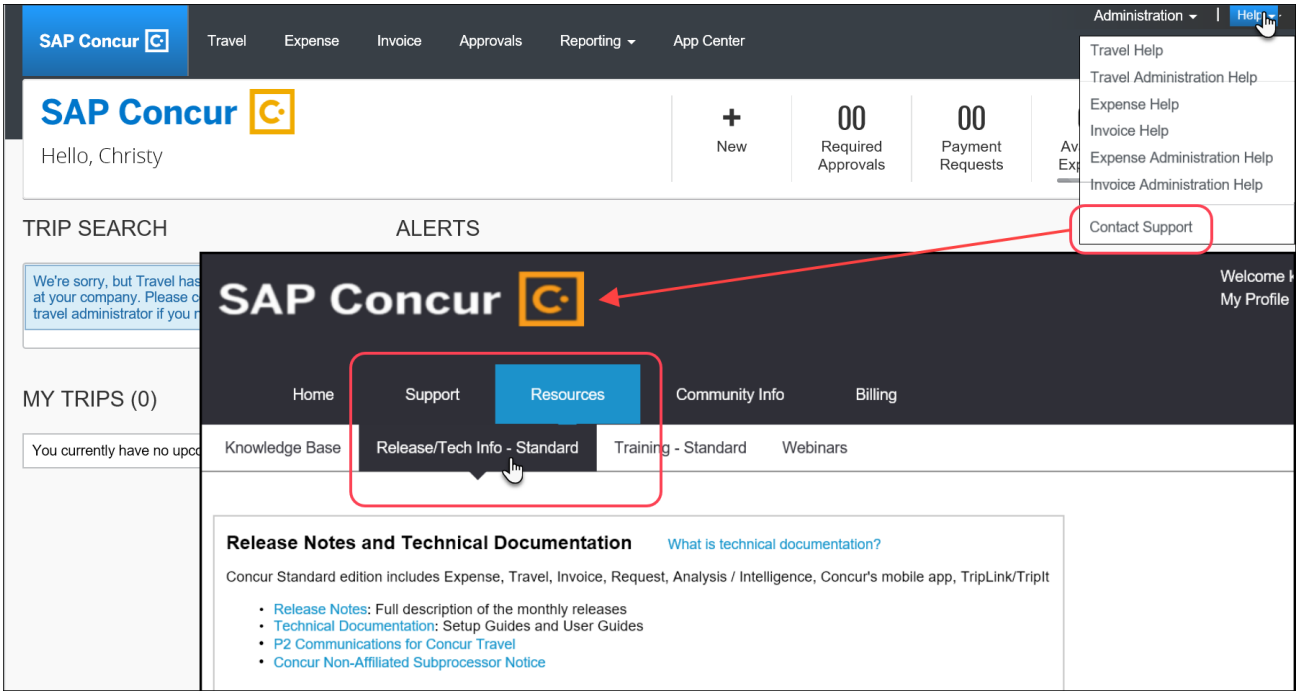
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: December 8, 2018 Initial Post: Friday, December 7, 11:00 AM PT	SAP Concur Client ***FINAL***

Contents

Legal Disclaimer

Release Notes

Admin

Updated Email Format **Ongoing**

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, consistent look-and-feel across all SAP Concur services.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent is to provide a consistent, updated look for users.

IMPORTANT

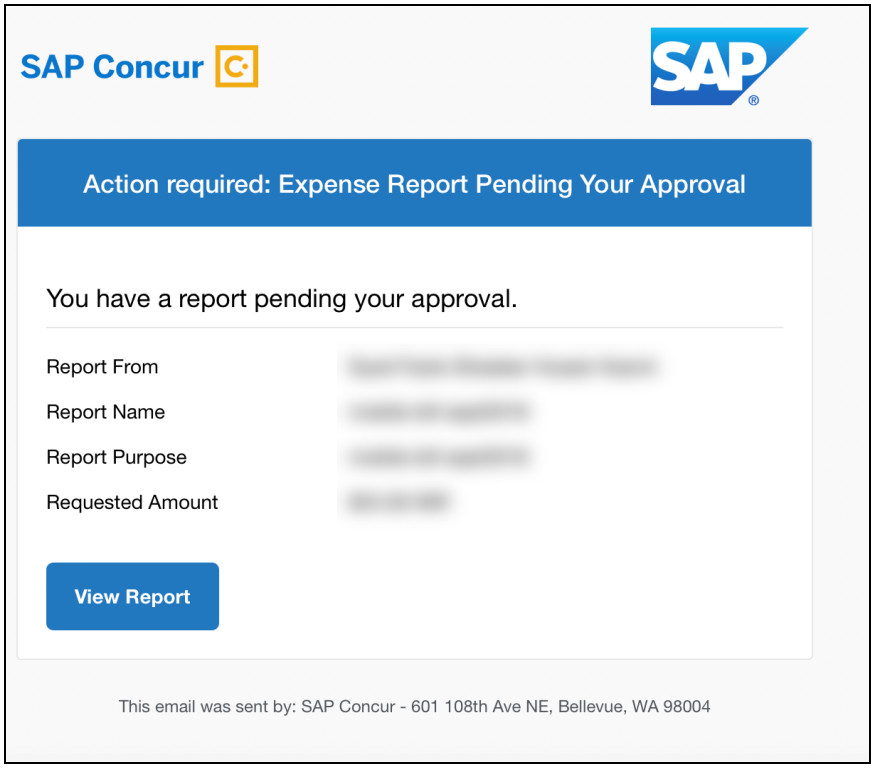
Note the following:

- Be aware that the email content has not changed – just the look and feel.
- The changes will appear over time. Each product team (Expense, Invoice, Travel, etc.) decides when to use the new format. Timing will be based on resource availability and the priority of other scheduled enhancements.
- Do not expect that all product emails will change at the same time. For example, perhaps Expense approval email will be first, and then other Expense notifications will follow.
- There is no assigned end date to the project. Expect that the changes may take longer than a year.
- Each team will provide release notes when their new emails are scheduled to appear.

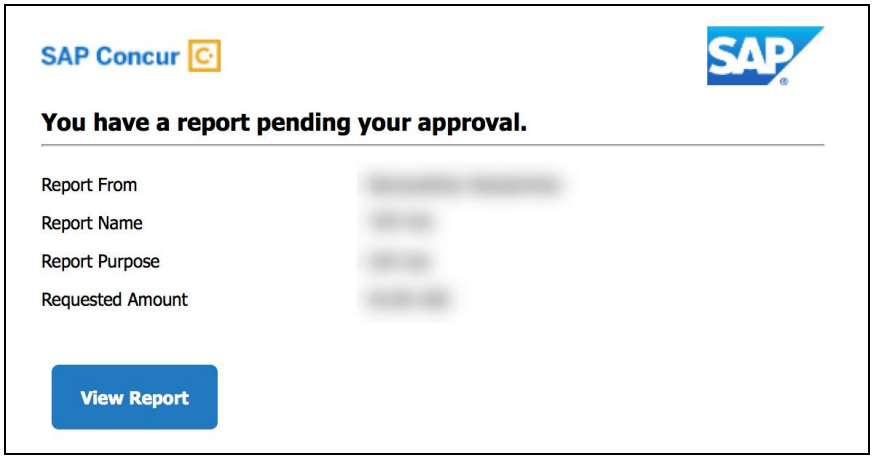
What the User Sees

The Expense approval email is shown below. Over time, all email generated from SAP Concur will have a similar look.

New email format:



Current email format:



Configuration / Feature Activation

This change will occur, over time, automatically; there are no additional configuration or activation steps.

Email Infrastructure Change **Ongoing**

Add IP Addresses to Safe Sender List

Overview

SAP Concur is transitioning to a new email infrastructure for outbound email from our products to SAP Concur users. Because of this, companies who filter inbound email based on the sending IP address must add the new IP addresses to their Safe Sender list to ensure that their users receive email from SAP Concur.

Concur Expense Only

Be aware that – at this time – the issue described here affects only companies that use Concur Expense ***and*** filter incoming email based on IP addresses. (This includes all editions of Expense – whether the company uses Expense by itself or integrated with any other SAP Concur product or service.) Other SAP Concur services (such as Travel and Concur Pay) are not currently affected.

We are currently targeting the first quarter of 2019 to make additional changes. Please monitor the release notes for more information about the timing of the additional changes.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If you use Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure any required Safe Sender lists for IP addresses are updated so that your users continue to receive SAP Concur email without interruptions.

Expense Assistant

Expense Assistant Can Create Trip-Based Expense Reports

Overview

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

This functionality was made generally available for the existing Expense user interface on November 17th. ***For users using the NextGen Expense user interface, the user onboarding messaging was made generally available on November 28th.***

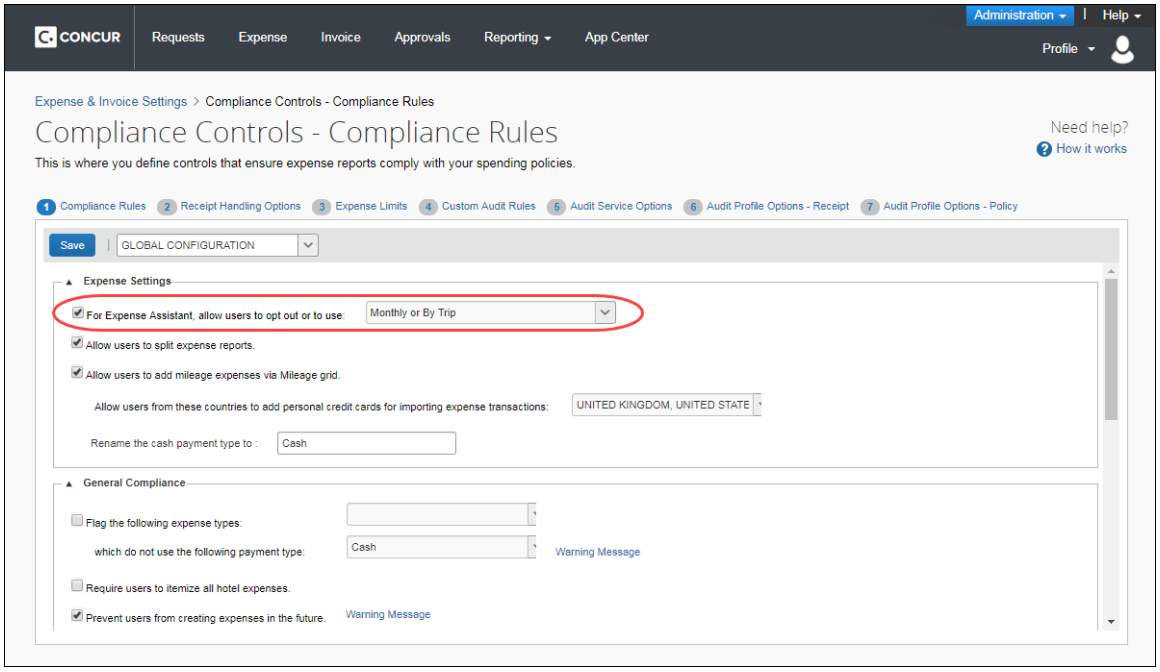
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use:** list contains new options.

With this list, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

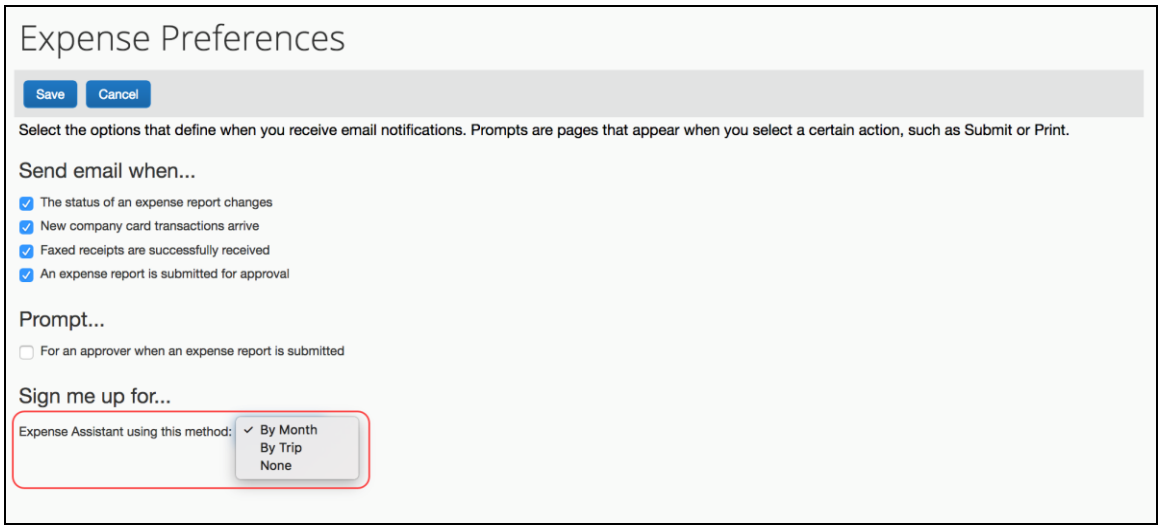
- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

What the User Sees - Existing UI

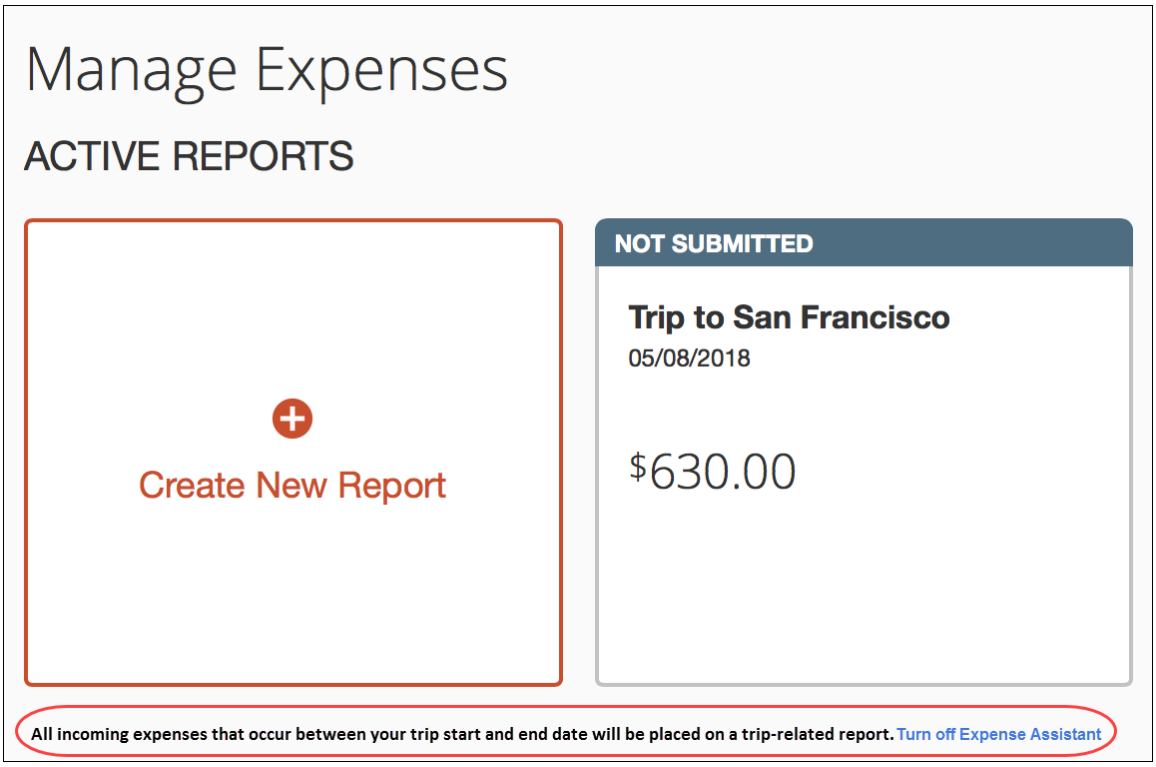
If the user is using the existing UI (has not yet moved to NextGen Expense), and the the setting is *Monthly or By Trip* or *Trip Only*, users will need to enable trip-based Expense Assistant for themselves.

There is one way a user can enable Expense Assistant: from Profile.

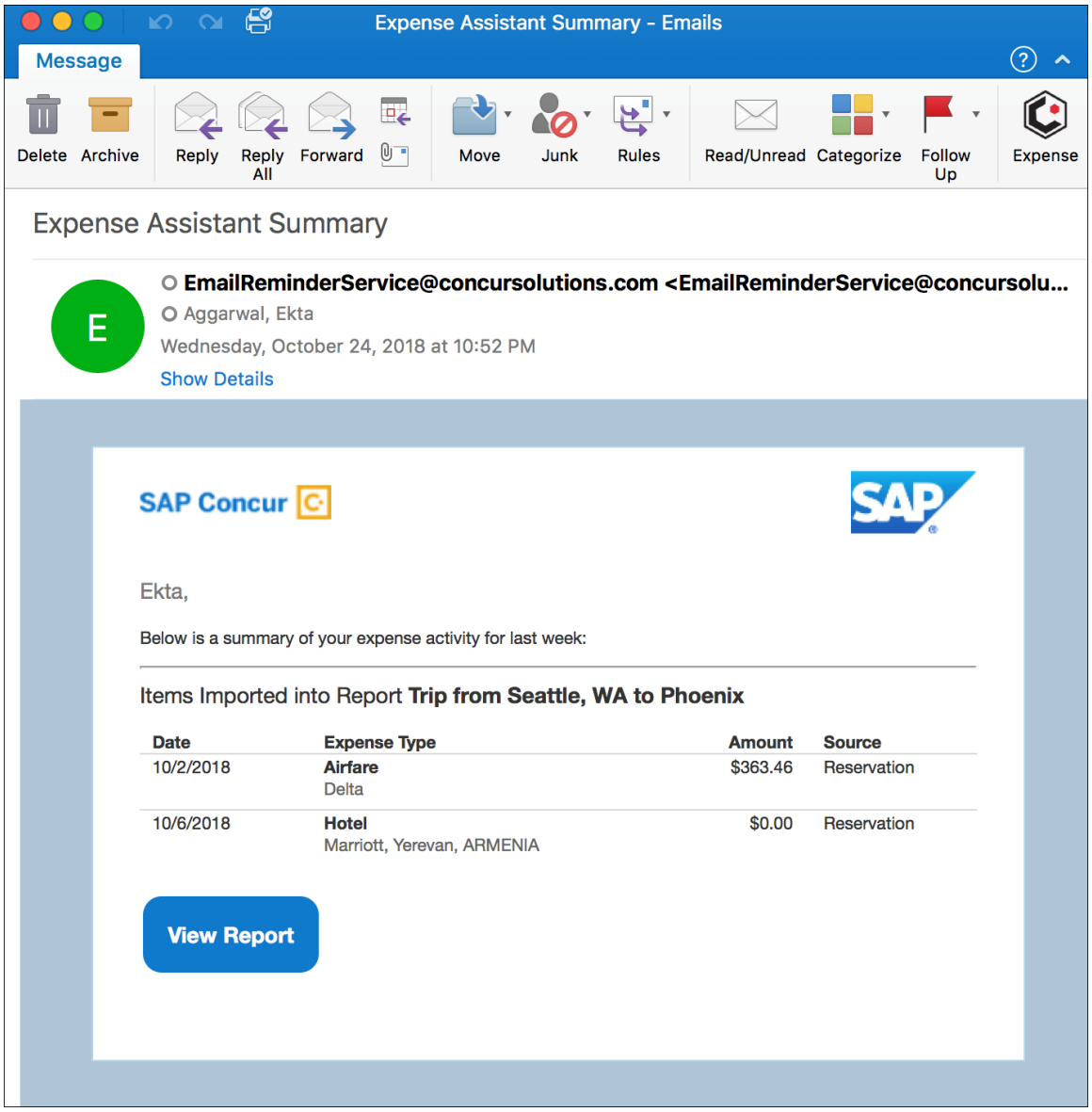
On the Expense Preferences page (Profile > Profile Settings), users select from the Expense Assistant using this method: [list of available options] list, and then click Save.



Once enabled by a user, for trip-based Expense Assistant, the following message appears and confirms that feature is on: "**All incoming expenses that occur between your trip start and end date will be placed on a trip-related report. Turn off Expense Assistant.**"



Since trip-based expense assistant may create expense reports at different times each month, Concur Expense sends the user a summary email when a trip-based expense report is created (if prior to trip start date). After that, Concur Expense sends a weekly email that summarizes the activity that occurred in the auto-created expense report after the trip began.



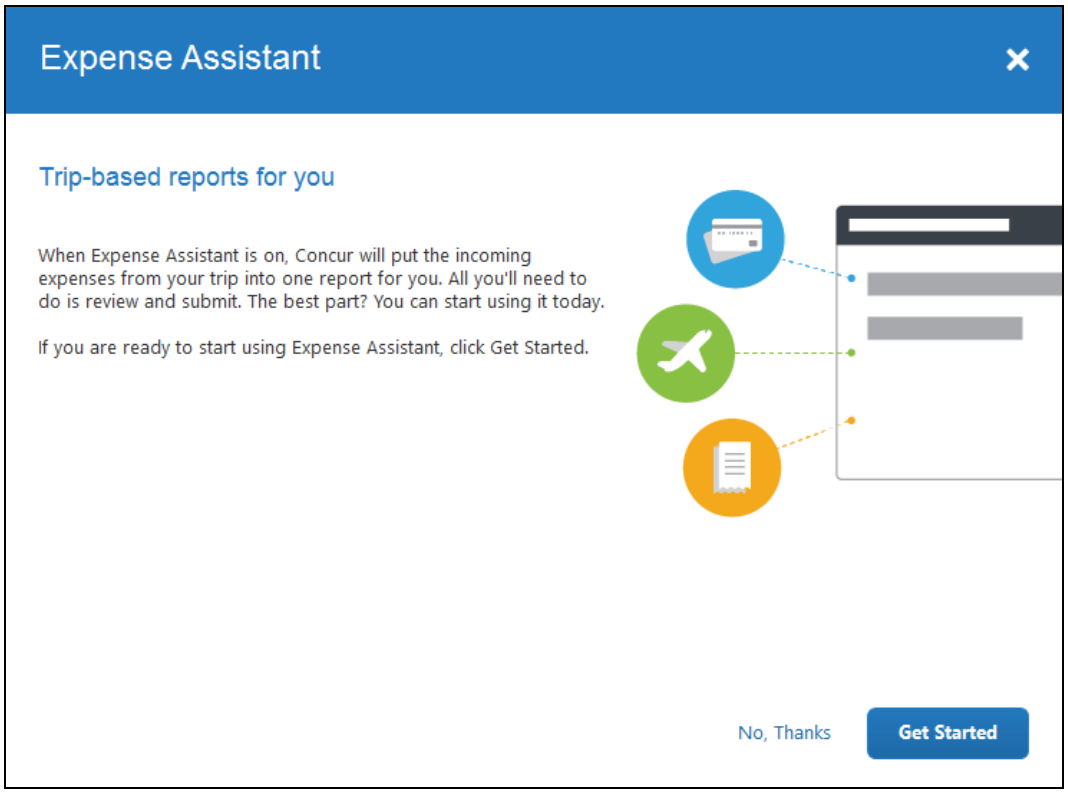
What the User Sees – NextGen Expense

ENABLE EXPENSE ASSISTANT

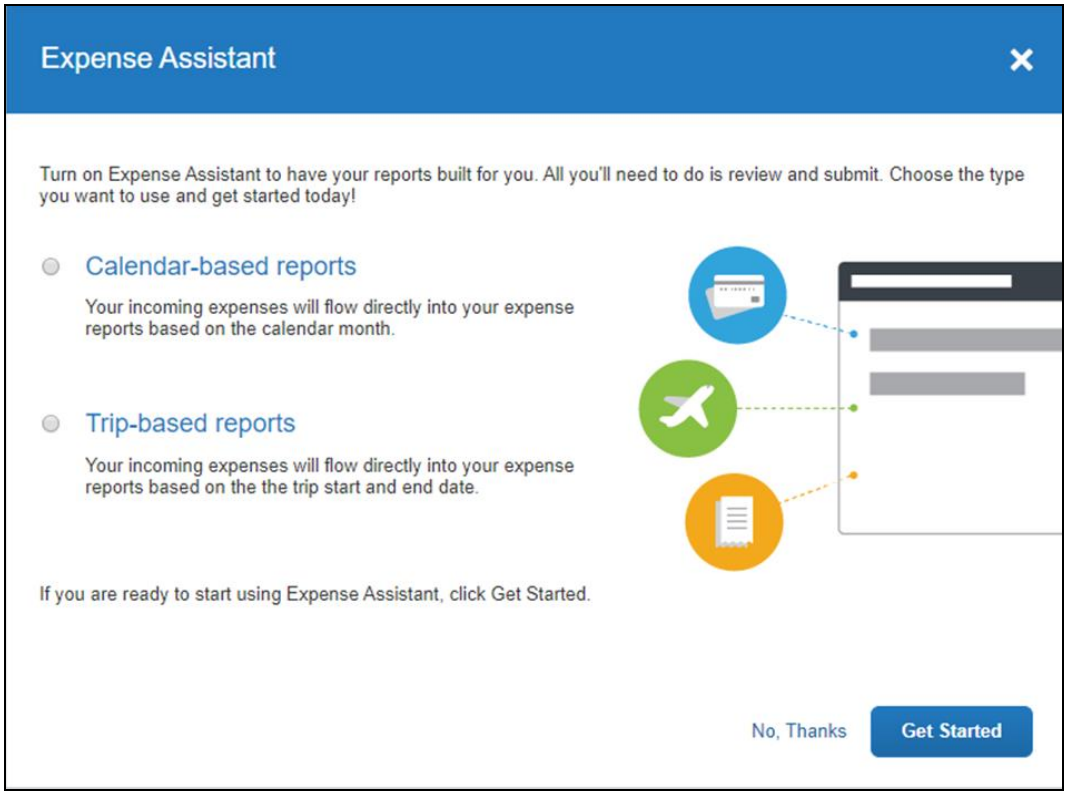
If the user is using NextGen Expense and if the user has at least one unexpensed travel segment (itinerary) in **Available Expenses**, the **Expense Assistant** page appears.

There are three ways a user can enable Expense Assistant: when they have Available Expenses, whether or not they have any Available Expenses, and from Profile.

- When your users log on to Concur Expense and go to the Expense home page, they will see the following screen. Since Concur Expense needs some available expenses and an unexpensed travel segment (itinerary) present to show how it works, this will show at the first time the user logs in and has available expenses to be used.
  - If the admin selected *By Trip only* in the **For Expense Assistant, allow users to opt out or to use** list, then the **Expense Assistant** page that appears allows the user to select whether or not to use the feature.

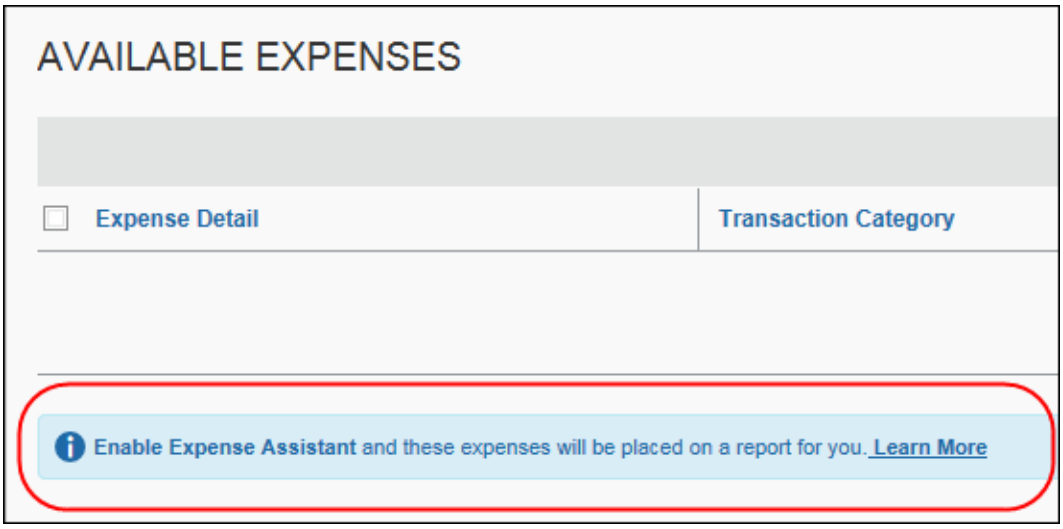


- If the admin selected *Monthly or By Trip* in the **For Expense Assistant, allow users to opt out or to use** list, then the **Expense Assistant** page that appears allows the user to select trip-based, calendar-based, or neither.



-Or-

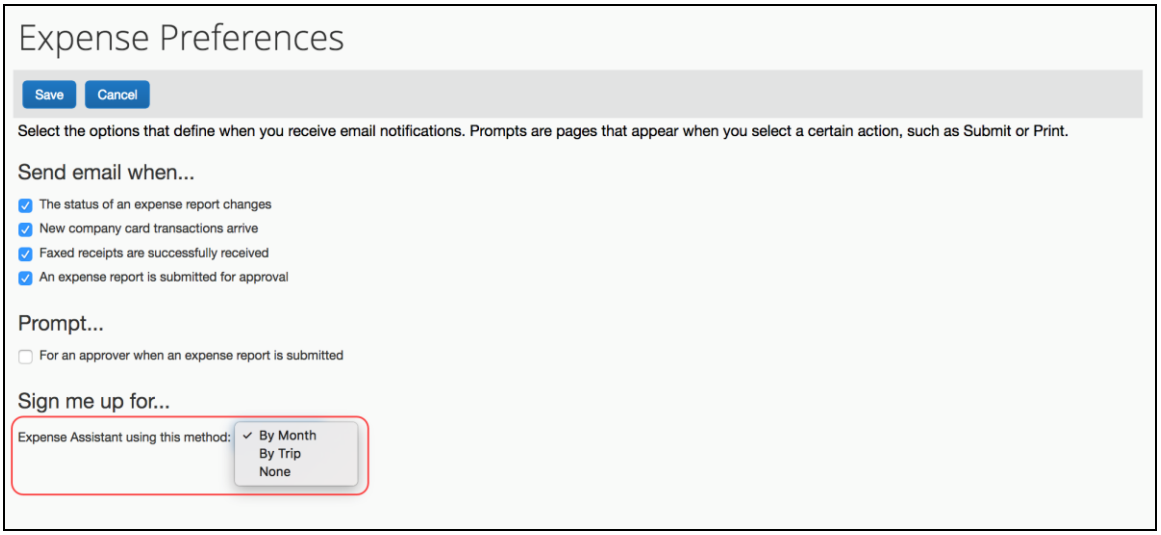
- If users do not currently have any available expenses or an unexpensed travel segment (itinerary), they will see the following message in the **Available Expenses** section:



The users need to click **Learn More**, and then click **Try it Now** to begin using Expense Assistant.

-Or-

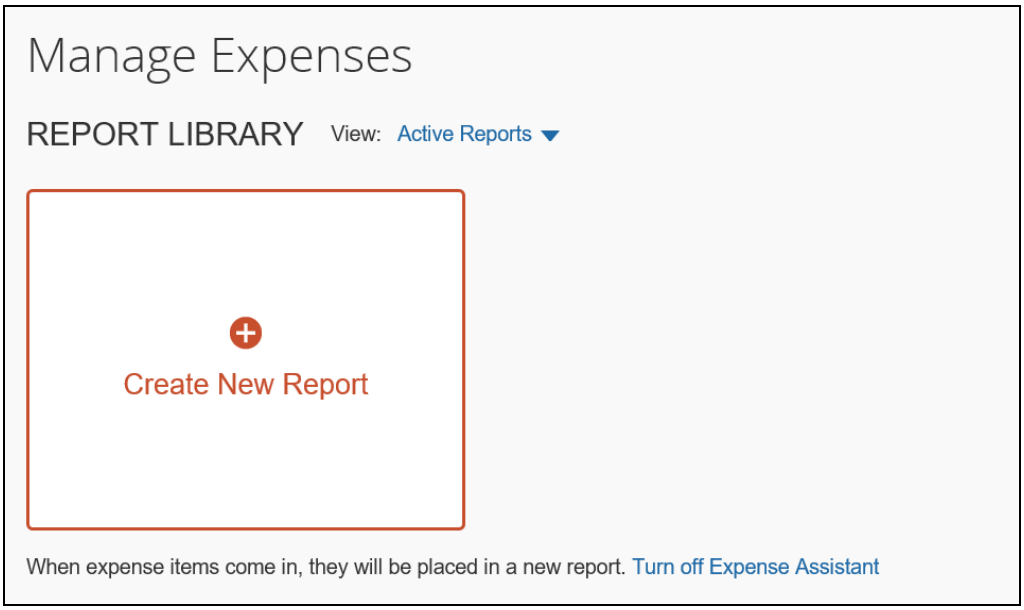
- If the user wants to enable Expense Assistant and the pages shown above do not appear automatically, the user can enable the feature in Profile. On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects *By Month* or *By Trip* from the **Expense Assistant using this method** list, and then clicks **Save**.



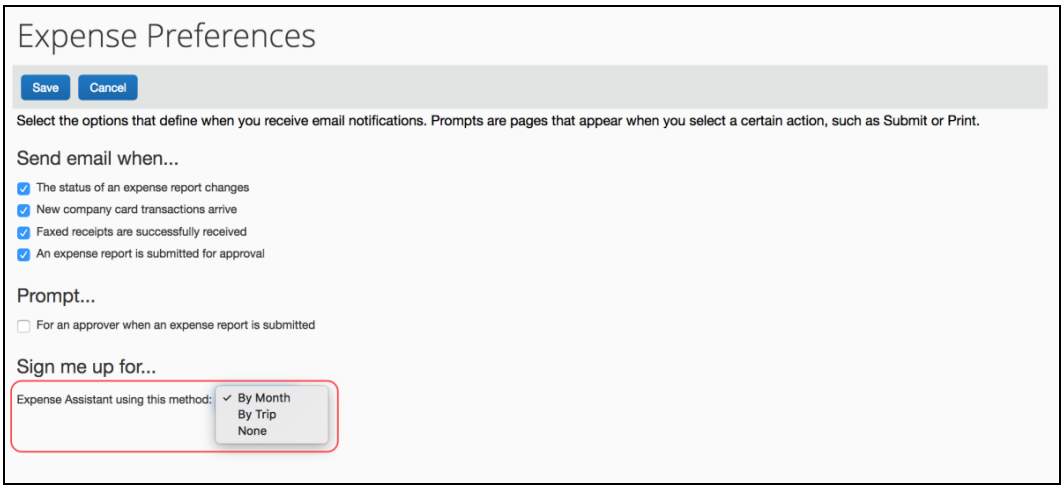
DISABLE EXPENSE ASSISTANT

The user can disable Expense Assistant two ways:

- On the **Manage Expenses** page, the user clicks **Turn Off Expense Assistant** below the report library.



- On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects *None* from the **Expense Assistant using this method** list, and then clicks **Save**.



Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration in remain unchanged.

For new clients, *Monthly or By Trip* is automatically selected (enabled) on the **Compliance Controls – Compliance Rules** page for the company, making the feature available to your users.

ALREADY IN USE

For example, if you use Expense Assistant today, *Monthly only* will be selected in the **For Expense Assistant, allow users to opt out or to use** field on the **Compliance Controls – Compliance Rules** page.

NOT CURRENTLY IN USE

For example, if you use Expense Assistant today, *None* will be selected in the **For Expense Assistant, allow users to opt out or to use** field on the **Compliance Controls – Compliance Rules** page.

NEW CLIENTS

Again, for new clients, *Monthly or By Trip* is automatically selected (enabled) on the **Compliance Controls – Compliance Rules** page for the company, making the feature available to your users.

📖 For more information, refer to the *Expense: Expense Assistant Setup Guide for Standard Edition*.

Expense Pay

(USD/CAD) Update: Retirement of Classic Pay and Migration to Global Pay (Deadline Sept 1)

Overview

Concur's **Expense Pay** (classic) products execute payments associated with processing expense reports. To ensure compliance with ever-changing regulatory requirements, tailored to geo-diverse markets, SAP Concur has engaged dedicated, experienced, third party payment-processing partners and developed a next generation pay product: **Expense Pay – Global**.

As previously announced in these release notes (September 2017), moving forward, SAP Concur will use one Expense Pay product to service your business anywhere in the world. Concur's **Expense Pay – Global** product will replace our existing legacy **Expense Pay** (classic) offerings (including NA Pay, EMEA Pay, and next APA Pay.) For Concur clients with an **Expense Pay** product, **Expense Pay – Global** will be our go-forward product. This notification begins our sunset process for all legacy **Expense Pay** (classic) products.

EXPENSE PAY – NORTH AMERICA AND EXPENSE PAY – EMEA LIMITATIONS

SAP Concur does not support client's adding the following currencies with the classic product: United States Dollars, Canadian Dollars, Mexican Pesos, Euro, Swish Frank, Danish Krone, Swedish Krona, or UK Pounds. If a client has already implemented and is using these currencies with the classic product, they can continue using these until they are migrated to the new platform or until the defined sunset date.

BUSINESS PURPOSE / CLIENT BENEFIT

The **Expense Pay – Global** offering maintains industry best practices for payment processing functionality within SAP Concur.

Configuration / Product Activation

Clients using USD and / or CAD payments must contact paymigration@concur.com to schedule your migration. After switching your contracted service to "Expense Pay – Global" our activation team will work with you to switch your funding from Expense Pay classic to global. You will be using the same Expense Pay service and tools that you are familiar with, like **Payment Manager**, and a ground up implementation is not required.

📖 For general information about **Expense Pay - Global**, refer to the following product guides:

- *Expense: Expense Pay Global User Guide*
- *Expense: Payment Manager for Expense Pay Global User Guide*

Japan Public Transportation (JPT)

Jorudan Maintenance

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Admin Sees

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

What the User Sees

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

Configuration / Feature Activation

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

Next Generation (NextGen) Expense

Ongoing New User Interface for Concur Expense End Users

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

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

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

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

  Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense: *All customers will be required to move to NextGen Expense***. This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

  Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

Product Settings

Cost Tracking Now Has a New Look, New Name –Released November 27, 2018

Overview

The **Cost Tracking** page in Product Settings now has a new look and flow, and a new name. All existing functionality remains with improved usability for field setup and management.

This feature was released on November 27, 2018.

The new enhancements include the following:

- The **Cost Tracking** page is renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page allows client admins to manage custom fields starting from one page. **Linked Lists** are renamed to **Multi-Level Lists**.
- A new **Add New Field** page is accessible from the **Manage Custom Fields** page. The **Add New Field** page allows client admins to create fields by selecting the field's type and then selecting field options. Client admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.
- Admins can create up to 12 custom fields, which can be created by typing in a custom field name or choosing from a list of suggestions. Previously, a maximum of 12 custom fields were allowed, but only six could be fields created by typing in a custom field name with the rest having to be chosen from the selected list. ***This feature will be available to everyone on Wednesday, December 5th, 2018. Until then, only six of the 12 fields can be created by typing in a field name.***

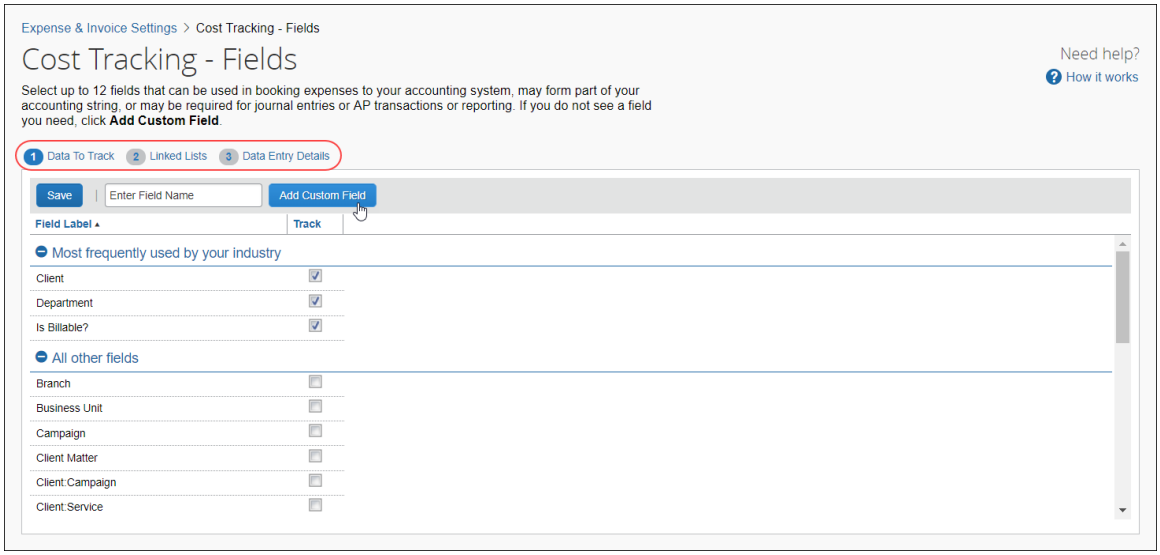
BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end user experience.

What the Admin Sees

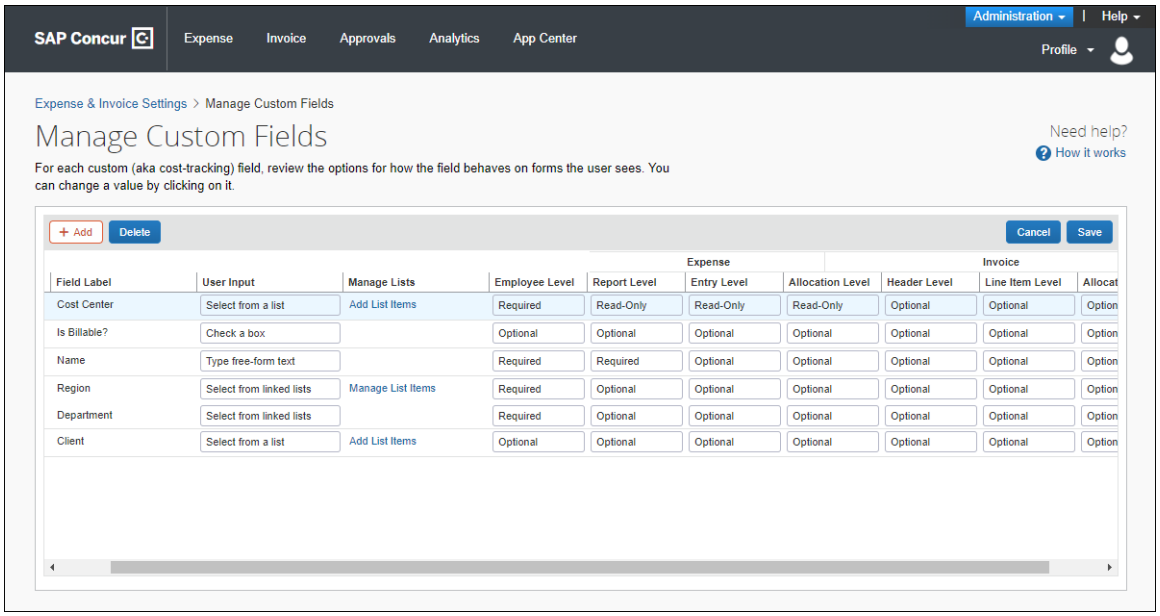
BEFORE

The existing **Cost Tracking – Fields** page included three field management tabs: **Data To Track**, **Linked Lists**, and **Data Entry Details**.



AFTER

The client admin now sees the existing **Data Entry Details** page, which is renamed to **Manage Custom Fields**. There are new buttons to add and delete custom fields, replacing functionality previously located on the **Select Fields** page.

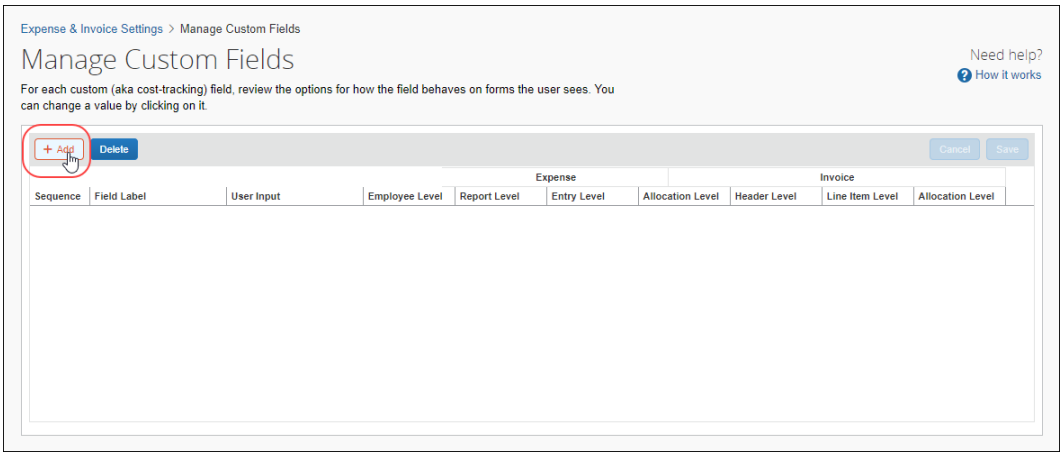


ADD NEW FIELDS

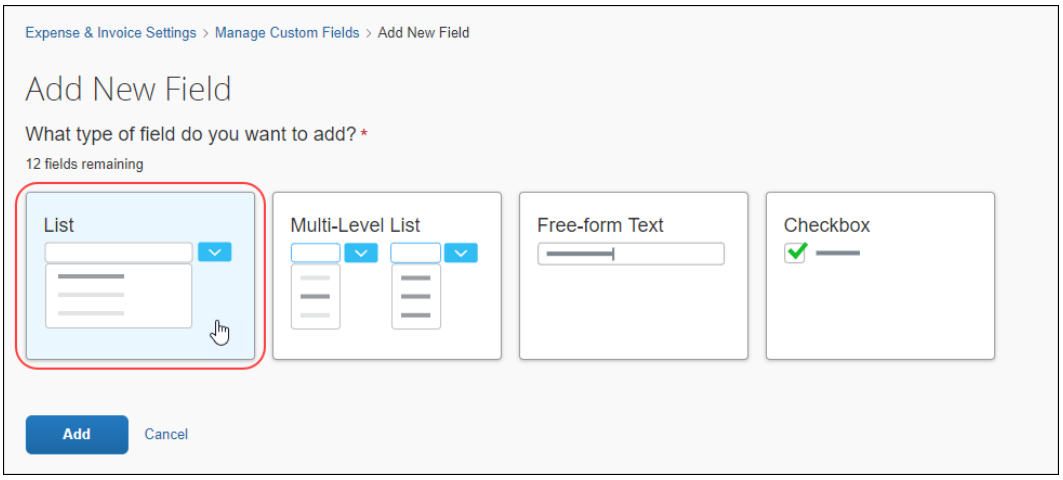
On the **Add New Field** page, client admins can create the following field types: list field, multi-level list (composed of two or more levels), free-form text, or a check box. Admins can add up to 12 custom fields, which can be created by typing in a custom field name or choosing from a list of suggestions.

To add a new field:

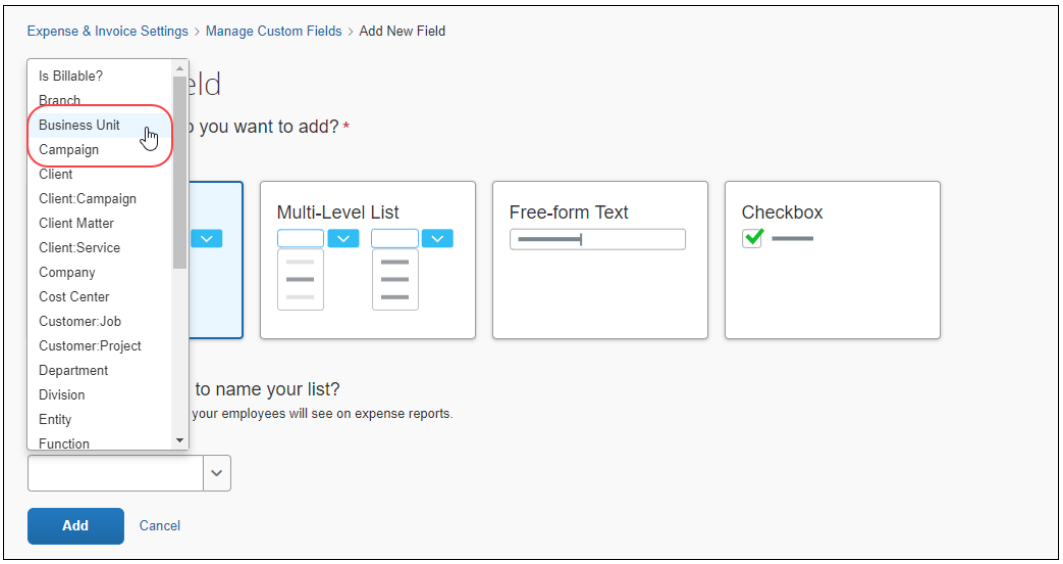
1. On the **Manage Custom Fields** page, click **Add** to access the **Add New Field** page.



2. Click on the type of field you want to create.

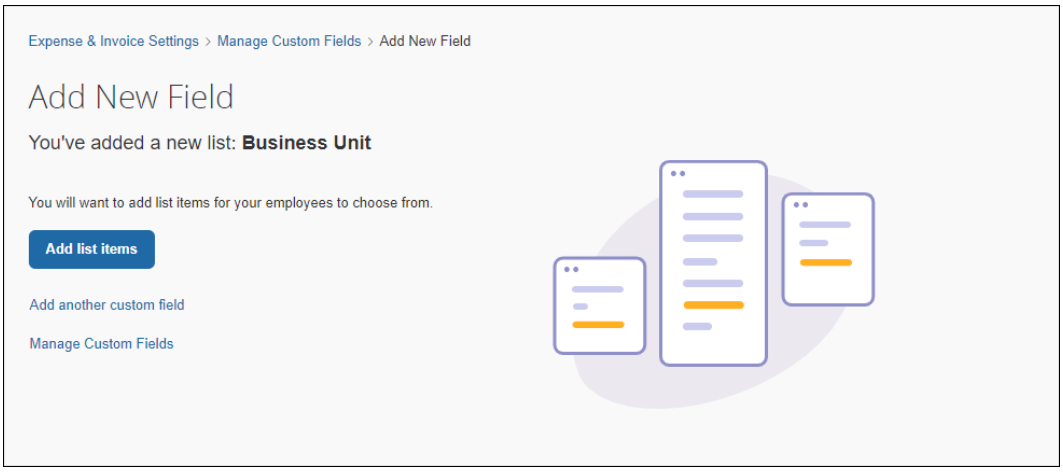


3. In the **What would you like to name your list?** section, in the **Field Name** list, select or type in a field name to use as a label when the field is displayed.



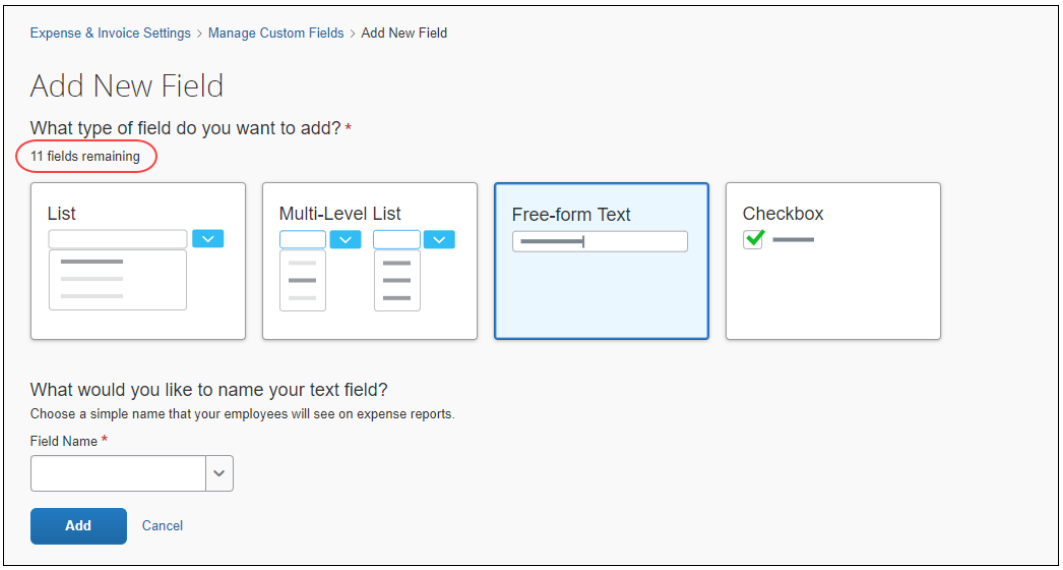
4. Click **Add**.

5. A message confirms the addition of the new field.



6. You can now choose to add list items, add another custom field, or return to the **Manage Custom Fields** page.

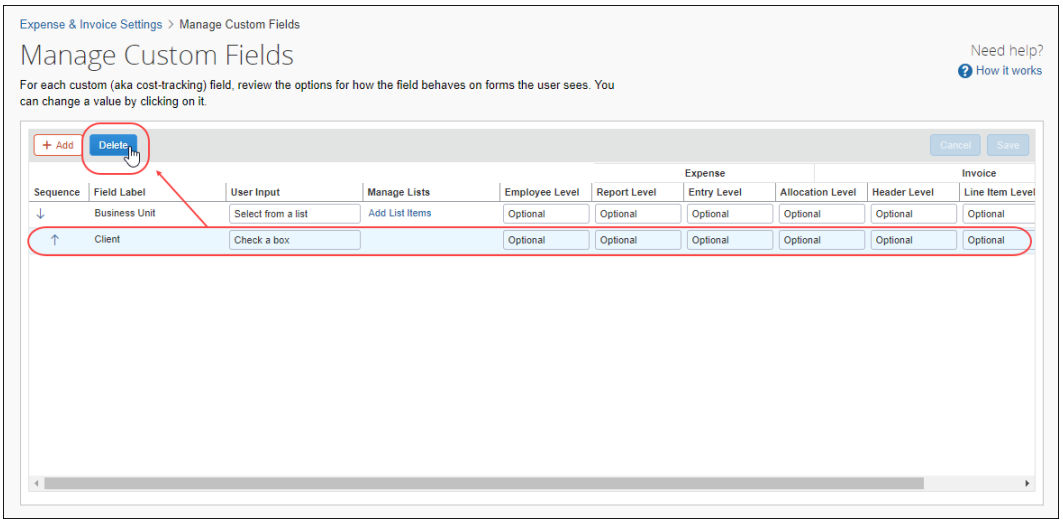
7. If you choose to add another new field, an on-screen message appears noting how many available custom fields you have remaining.



DELETE FIELDS

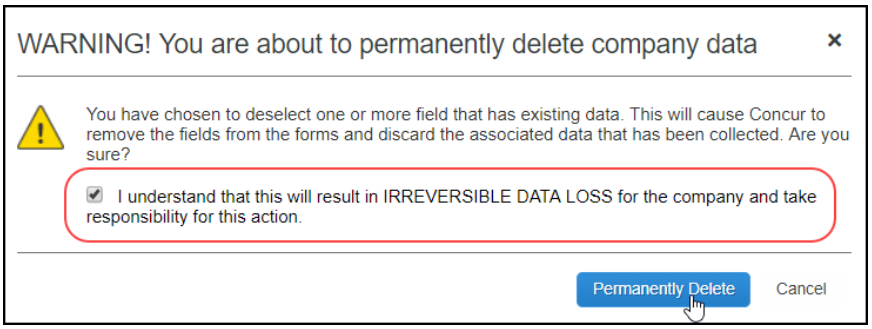
To delete a field:

1. On the **Manage Custom Fields** page, select the field you want to remove.



2. Click **Delete**.

3. In the message box, select the check box to agree to the terms of removing the fields.



4. Click **Permanently Delete** to remove the field.

Configuration / Feature Activation

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

For more information, refer to the *Shared: Cost Tracking 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.

Admin

Planned Changes Archive Deactivated User Data

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet customer expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for ***at least three years***. The archive process moves this "deactivated" user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

USER / CUSTOMER BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for inactive user's personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that customers are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

A. SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

A. SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – they have been "marked inactive" in the SAP Concur system. A user must be deactivated for ***over 3 years*** without having been re-activated in order to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

A. ***For Professional Edition***, the most significant difference would occur in **Company Admin > User Administration**.

However, once user information is archived:

- From within User Administration, if the **Use Travel Advanced Filters** option is chosen, the user will not be visible.
- From within User Administration, if the **Use Expense Advanced Filters** option is chosen, you will be able to see the user in search results as deactivated.
    - If you click the user's name, you will receive an error message: *The selected user exists in the Expense or Invoice application but the user contains conflicting or missing data. Contact SAP Concur support to request help in resolving this error.*
    - If you click the icon in the **Profile** column, you will receive the generic error message.
    - If you click the user's login ID, you will see no historical login information for that user.

- If another user has the Self-Assigning Assistant permission or the user is a Proxy who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive an "switching user" error message.
- From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- These users will not have access to any of their past travel history.
- For Expense, the user would have access to their expense history if:
  - That history has not been removed by a Data Retention policy.
  - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

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

Planned Changes New SAP Concur Sign In Page

Overview

SAP Concur is planning to add a new **Sign In** page, providing an updated login experience for users who log in with a user name and password credentials. Current Single Sign-On (SSO) users will log in without having to enter additional credentials. This feature is planned for 2019.

The new **Sign In** page feature includes the following:

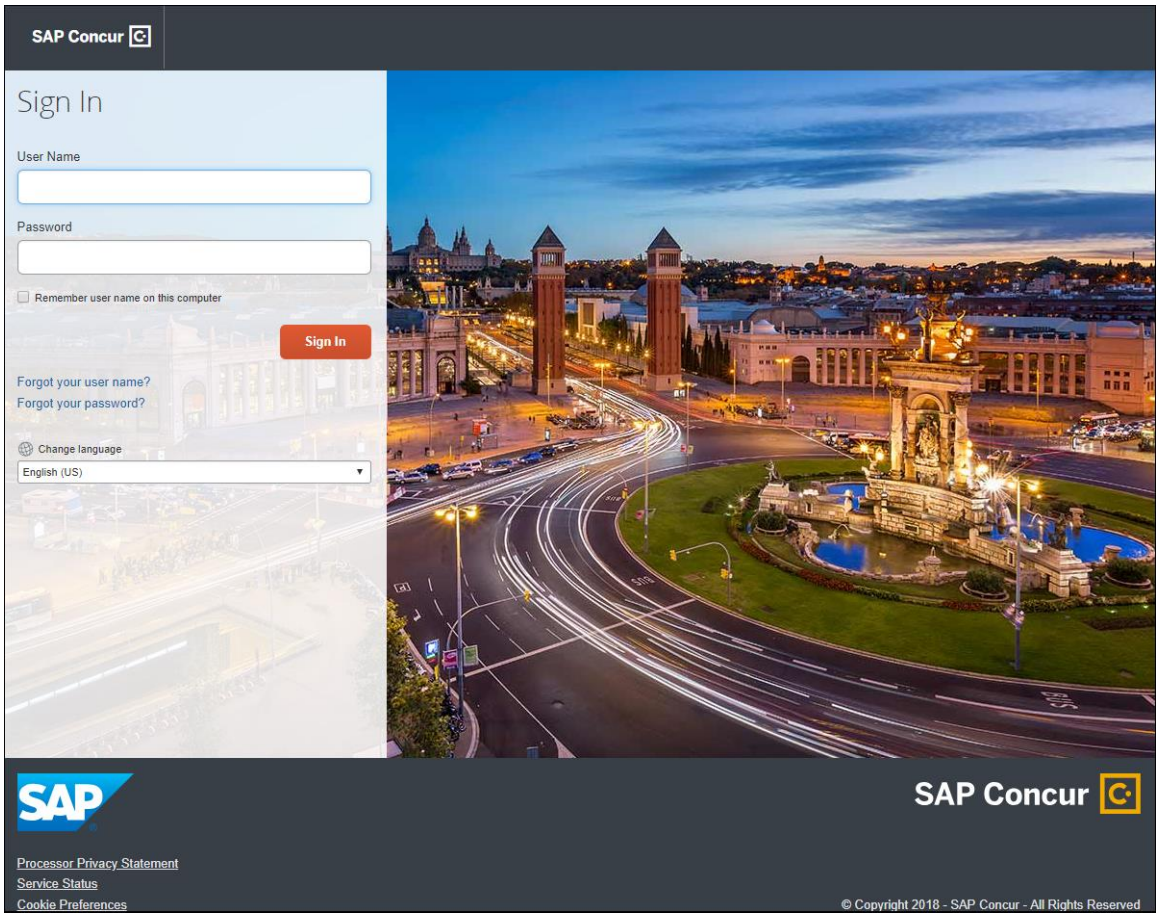
- **Two-step login:** provides enhanced security, meets current industry standards, and provides a better login success rate
- **Multi-account login:** allows administrators to log in with multiple accounts
- **Password hint removal:** provides better security for users and SAP Concur
- **User avatar:** enhances the user experience (planned for a future release)

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security and a faster, convenient experience for users logging in to SAP Concur products and services.

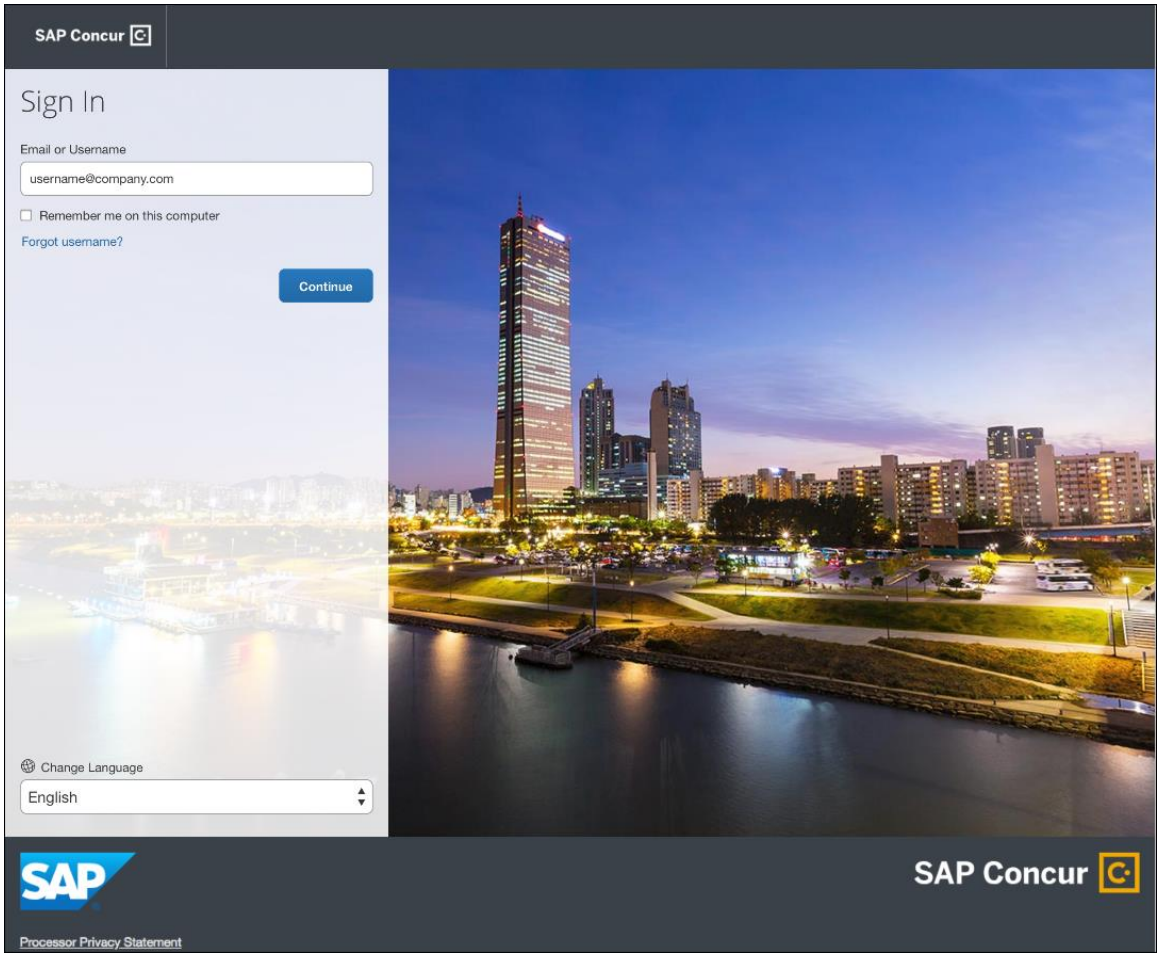
What the User Sees – Current Sign In Page

The SAP Concur **Sign In** page currently appears with **User Name** and **Password** fields, and a **Sign In** button. Once a user is authenticated, the SAP Concur **Home** page appears.



What the User Sees – New Sign In Page

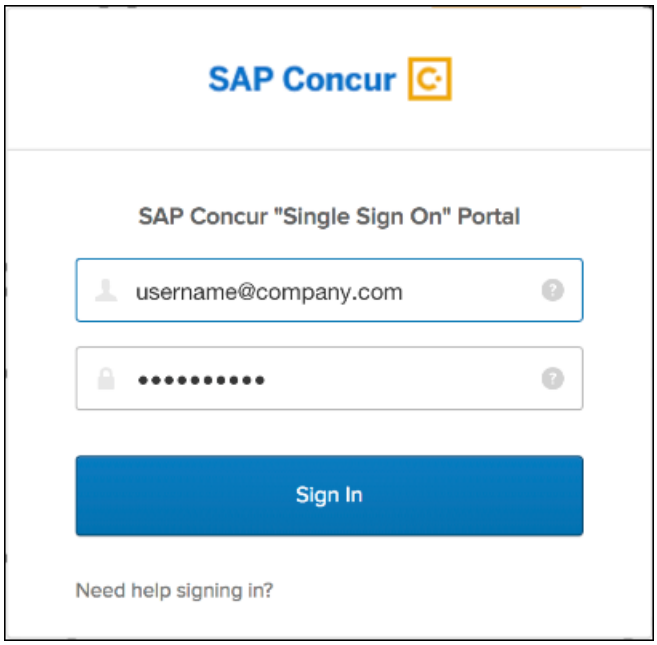
The new SAP Concur **Sign In** page will have an **Email or Username** field and a **Continue** button. The user will type in their email or username. The user can select the **Remember me on this computer** check box, so their email or username displays the next time they log in to SAP Concur. The user will then click **Continue**.



Depending on the customer's implementation of SAP Concur, users will then be directed to the designated Identity Provider (IdP) Single Sign-On portal or an additional **Sign In** page.

SSO Users

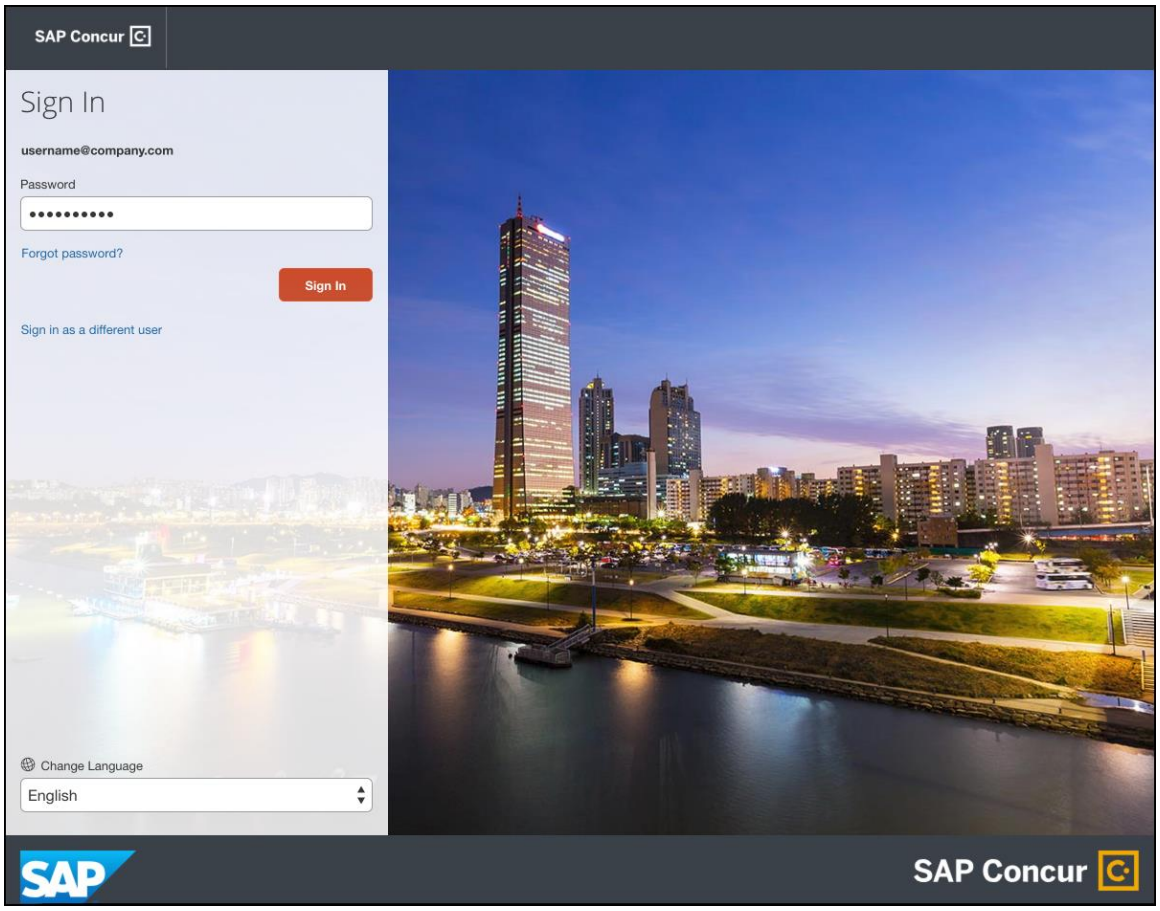
When the designated Identity Provider (IdP) Single Sign-On portal appears (similar to the one shown below), the user will enter their email or username and password, then click **Sign In**.



After being authenticated, the user will be directed to the SAP Concur **Home** page.

USERS WITH USERNAMES AND PASSWORDS

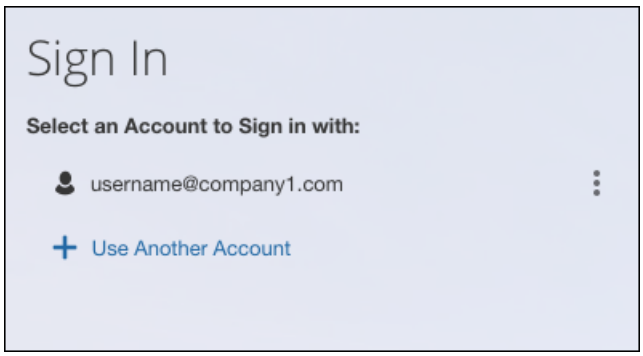
The user will be directed to an additional **Sign In** page. The user will enter a password and click **Sign In**. The system will then authenticate the user's credentials.



Once the user's password is verified, the SAP Concur **Home** page appears.

RETURN USERS

If a returning user selected the **Remember me on this computer** check box during their initial login session, they will see their email or user name display on the **Sign In** page. Users who did not select the **Remember me on this computer** check box will log in as they did initially.



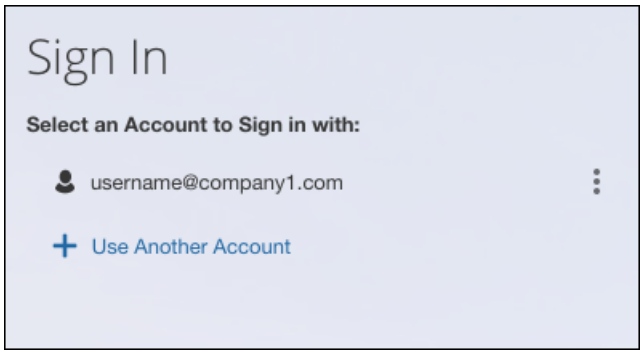
The user will click on their email or username, and then one of the following occurs:

- **SSO Users:** The user will be directed to the SAP Concur **Home** page.
- **Users with Usernames and Passwords:** On the **Sign In** page, the user will enter as password and then click **Sign In**. The user will then be directed to the SAP Concur **Home** page.

USERS WITH MULTIPLE ACCOUNTS

SAP Concur users with multiple login accounts have more than one login option depending on the user role or account they want to use. The user will first log in to SAP Concur using one of their accounts. Once successfully logged in, the user logs out of the system.

To add another account, on the **Sign In** page, the user clicks the **Use Another Account** link.

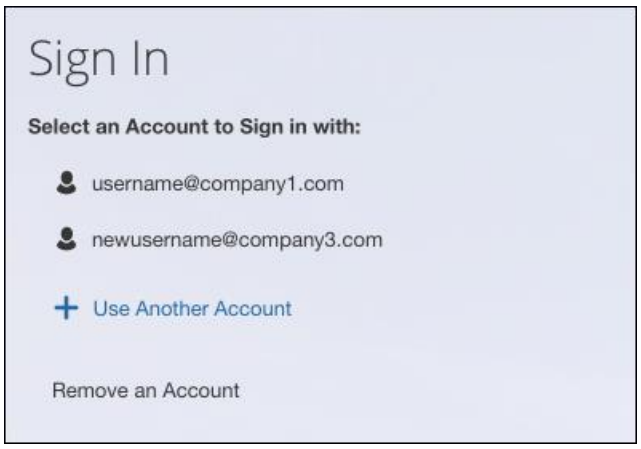


The next login step depends on the account type the user wishes to use:

- **SSO Account:** If the user selects an account with SSO credentials, the user will enter an email, then the user will be directed to the IdP Single Sign-On portal. Once the user is authenticated, the SAP Concur **Home** page appears.

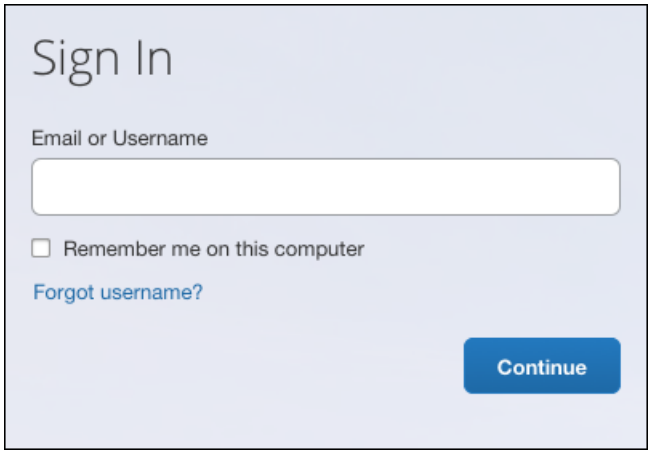
- **Username and Password:** The user is directed to an additional **Sign In** page to enter a password. The user then clicks **Sign In**. Once the user is authenticated, the SAP Concur **Home** page appears.

When all accounts are added, a return user will select the account they want to use to log in to SAP Concur.

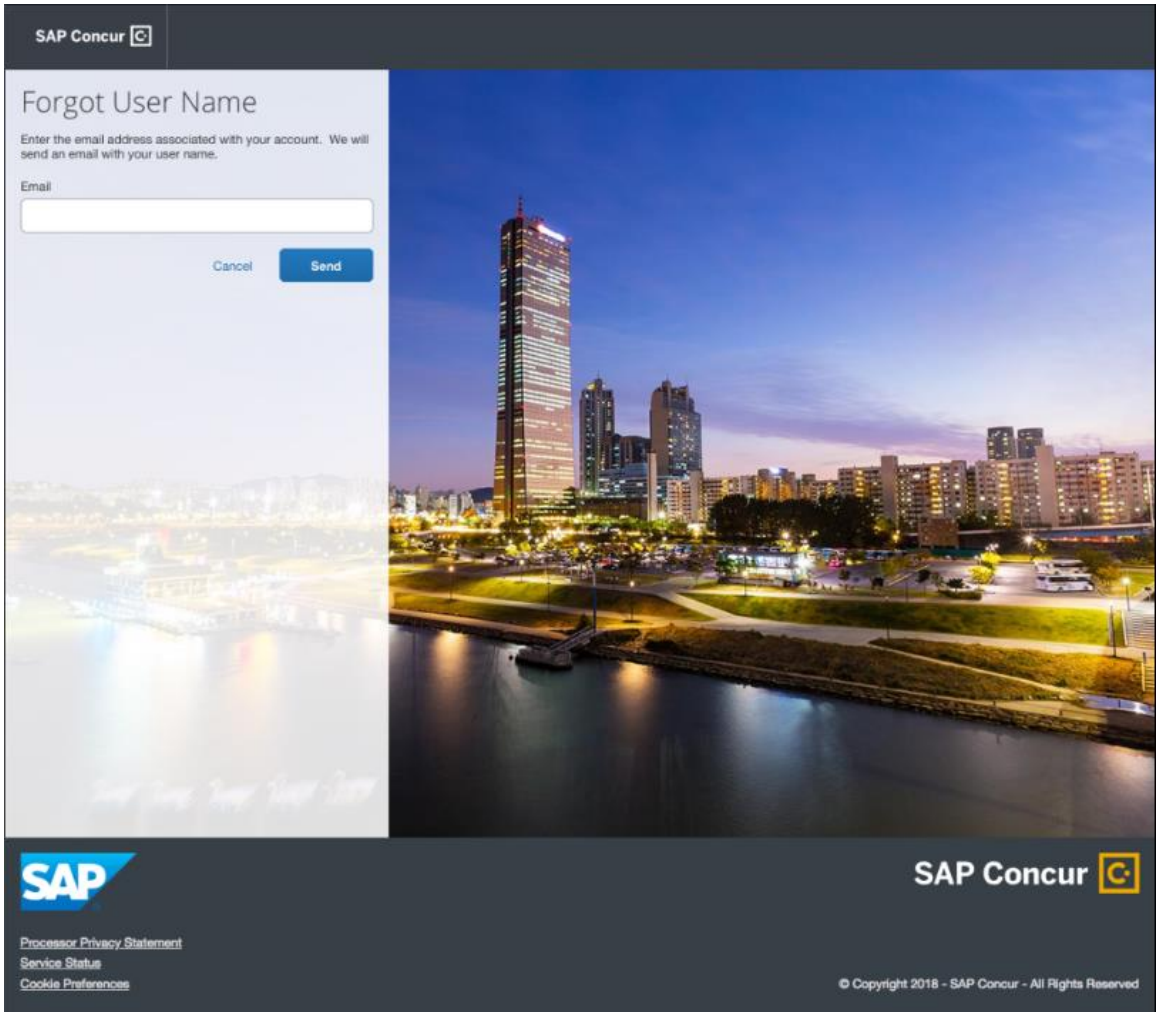


FORGOT USER NAME

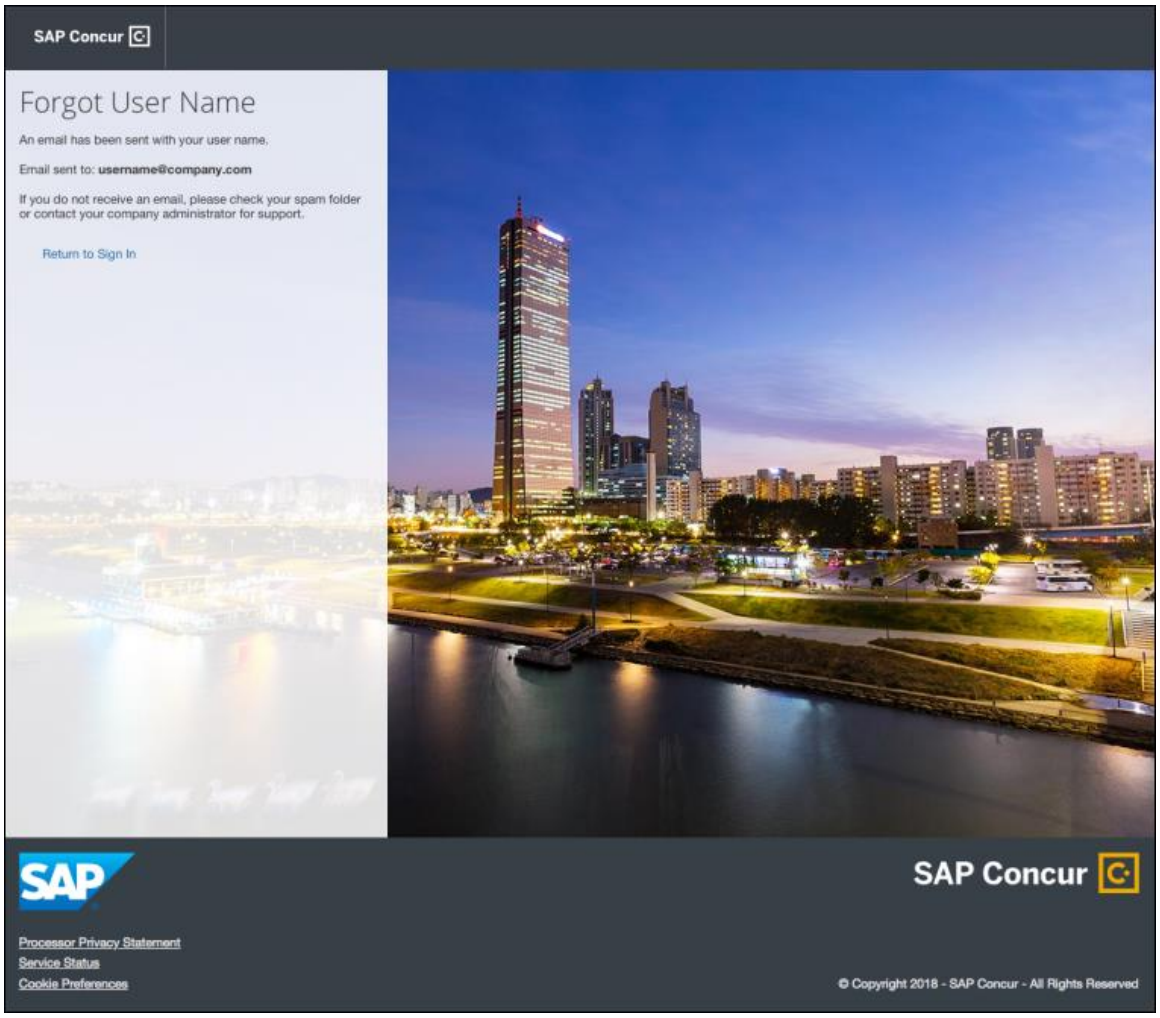
If a user forgets their user name, the user will click the **Forgot username?** link on the **Sign In** page.



Next, the **Forgot User Name** page appears, and the user will enter their email and click **Send** to have an email sent to a verified email account. This email will contain their user name.



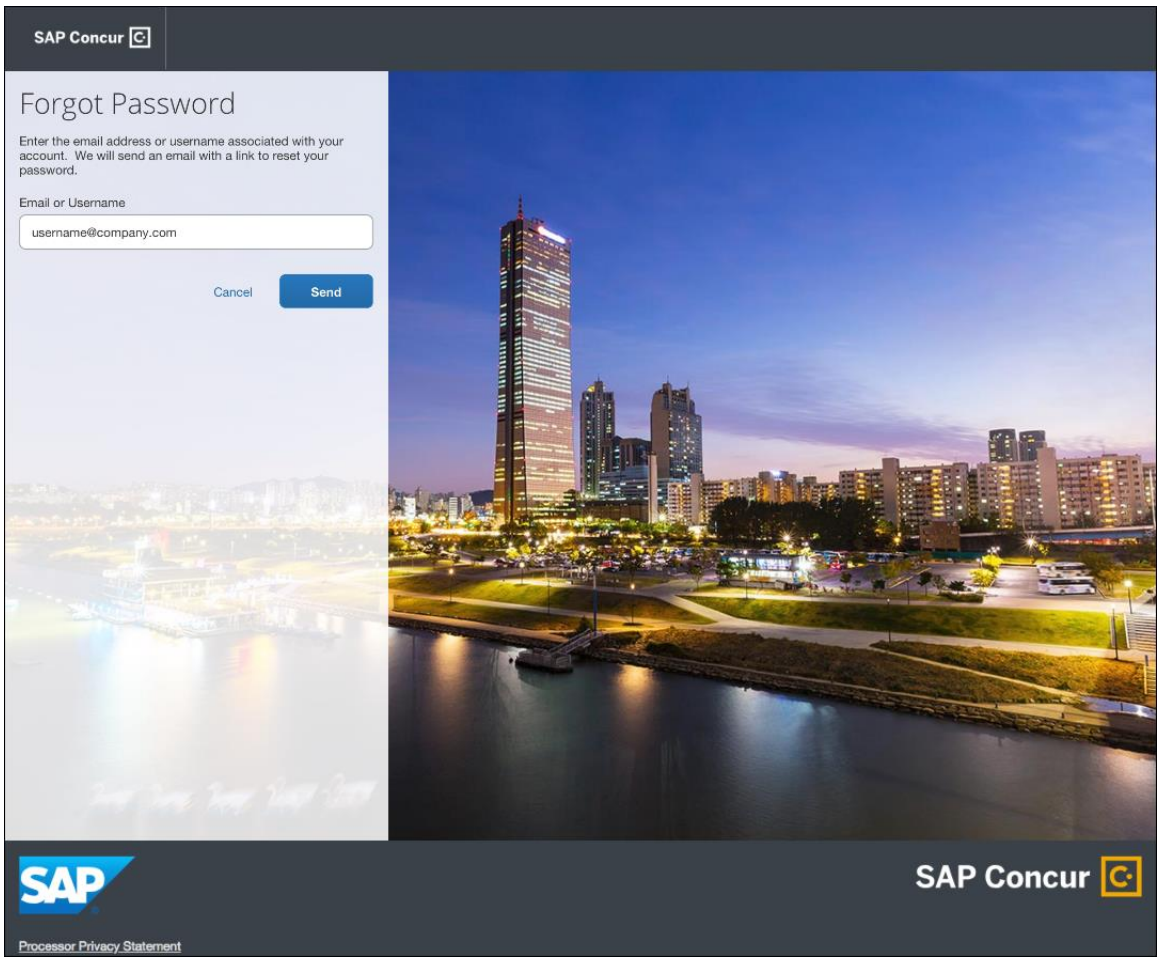
The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



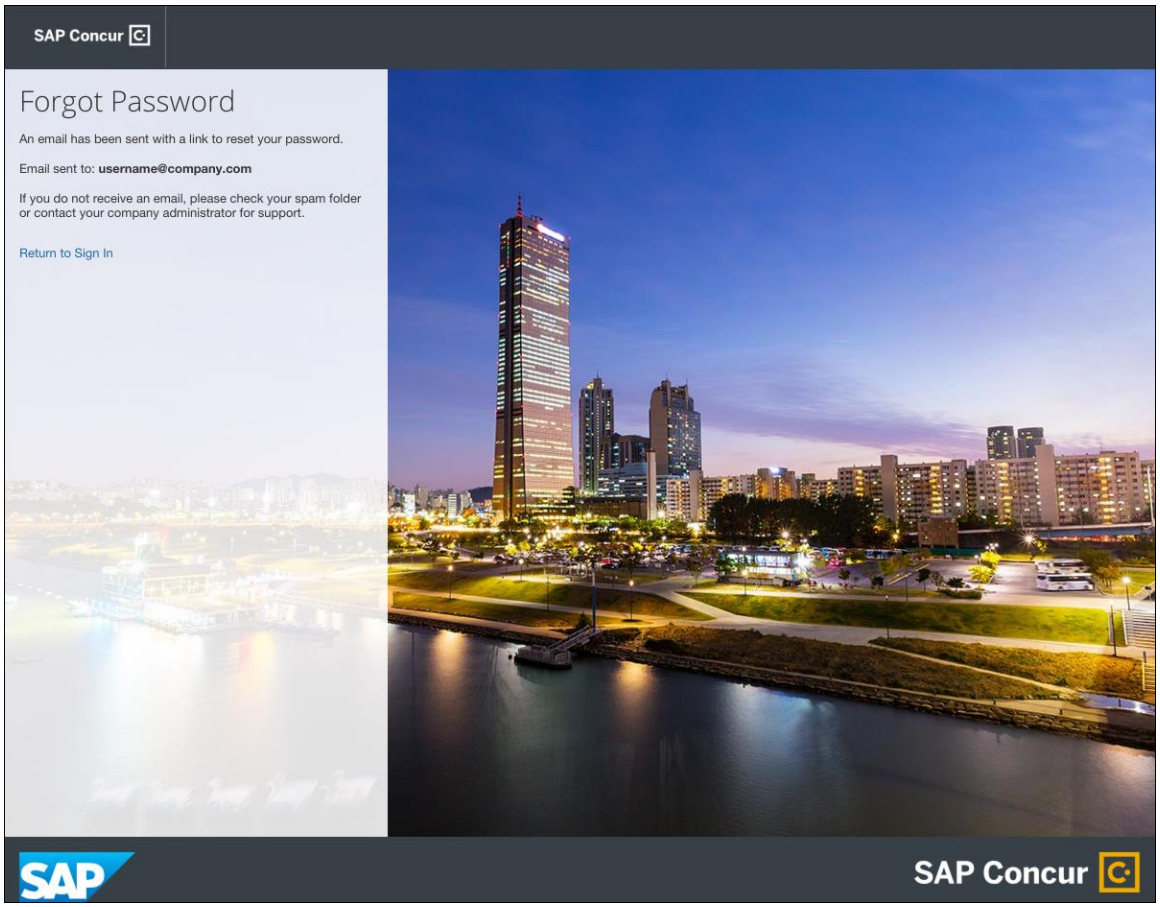
INVALID PASSWORD

If a user forgets their password, an on-screen message will appear alerting the user. The user will then click **Send** to have a password reset email sent to their verified email account.

SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.



The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



Configuration / Feature Activation

Configuration information will be provided in a future release note.

Budget

Planned Changes Workflows for Budget

Overview

In a future release, workflows will be available for Budget. Workflows define how the system routes invoices, expense reports, and requests through approval and processing steps. SAP Concur's flexible workflow feature for Budget allows companies to design workflows specifically tailored to their unique needs.

Without budget review, budgets may become fully consumed well before the end of a period or year leaving an organization with limited options and budget owners with, for example, exceeded budgets. In addition, early spending means that more

important (to the organization) spending will be declined because lesser important spending consumed the budget early on.

Combining budget review in the workflow adds value. Audit rules and workflow step rules can help organizations to add in controls when it makes sense to fine tune to an organization's specific needs.

Equally important is the determination when a spending item is regarded as committed toward a budget. In most organizations, the commit is when a spending item is paid; it went through most if not all approval steps. In other organizations, the commit occurs much earlier. As soon as a purchase request or an authorization request is approved it is regarded as "promised".

BUSINESS PURPOSE / CLIENT BENEFIT

This feature will provide clients with control over the budget spend to, for example, avoid exceeded budgets too early in a budget period or budget year.

Configuration / Feature Activation

The administrator needs to configure this feature on the **Approval Routing** page.

To access the Approval Routing page:

1. Click **Administration** > **Invoice Settings** or **Expense Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice* or *Expense* depending on the product you are working with.
3. In the **Policy** section, click **Show Advanced Settings**.
4. Click **Invoice Approvals**, **Expense Approvals**, or **Purchase Request Approvals**.

Expense Pay – Global

Planned Changes (USD) New Payment Processing Partner: WUBS

Overview

Public sector clients will be able to use Western Union Business Solutions (WUBS) to process their United States Dollar (USD) payments.

The Expense Pay – Global product functions the same way regardless of which payment-processing partner your funding account is configured to use. What is different about WUBS compared to Bambora (or classic Expense Pay) is how your funding accounts are setup in Concur Expense. Each payment-processing partner has

unique forms that must be completed, submitted, and approved as part of the onboarding process.

NOTE: Company cards supported for payment-processing partners are not partner-specific.

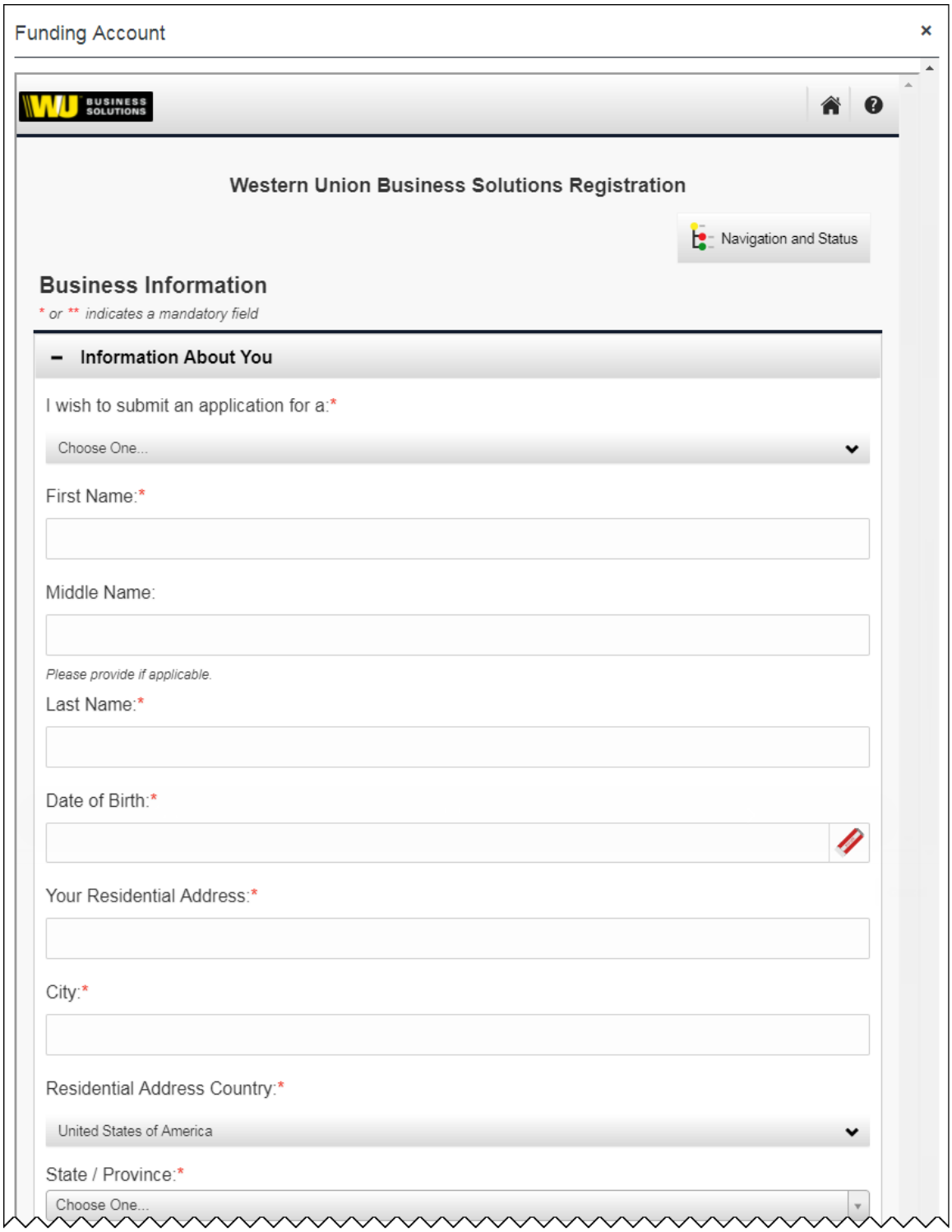
BUSINESS PURPOSE / CLIENT BENEFIT

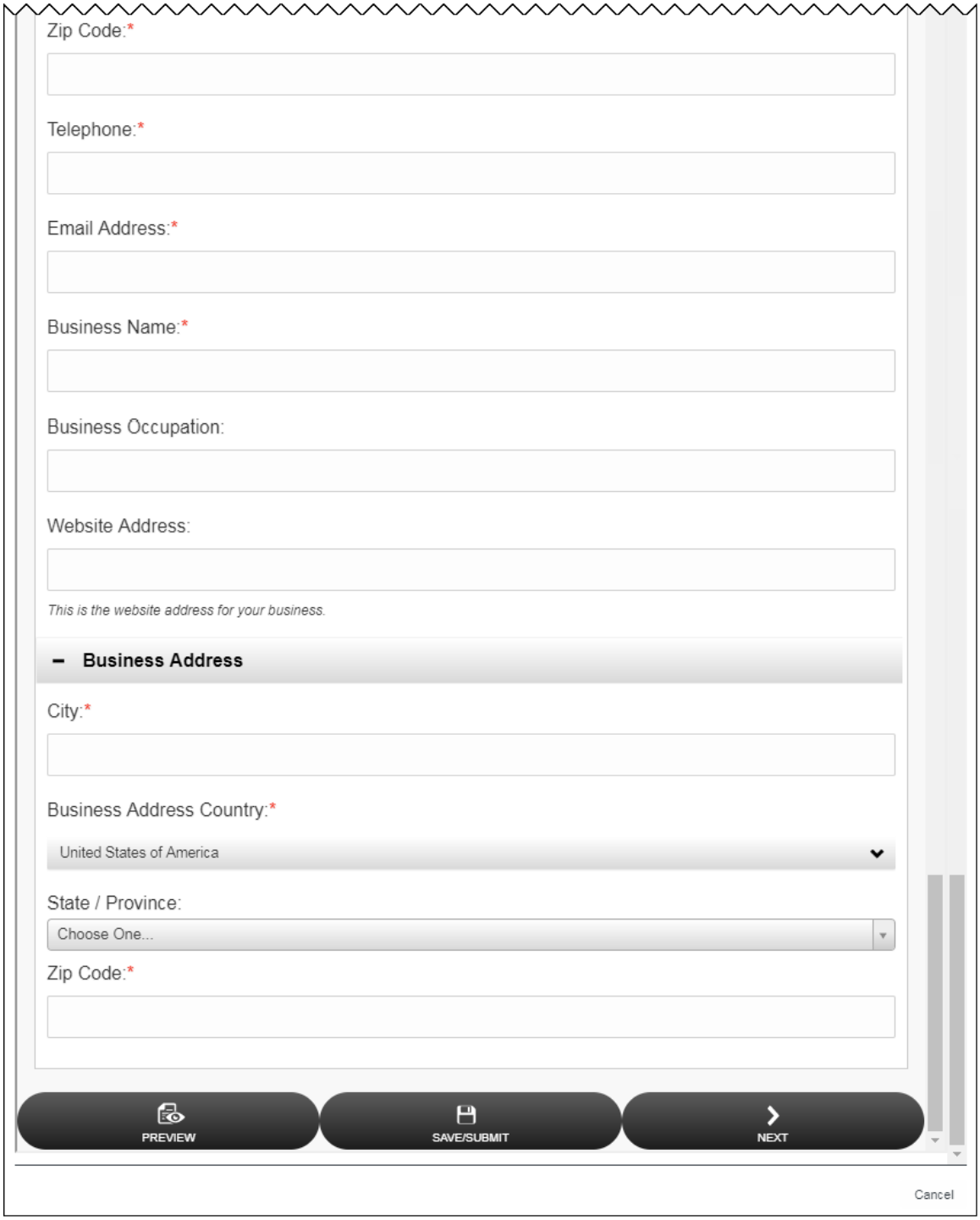
This additional payment-processing partner increases the value of our Expense Pay – Global offering.

What the Admin Sees

When enabled, you may create a new WUBS global funding account. The user interface will display an imbedded WUBS onboarding application form. Western Union retains control over the design and maintenance of the onboarding application form.

EXAMPLE


Funding Account
BUSINESS SOLUTIONS
Western Union Business Solutions Registration
Navigation and Status
Business Information
* or ** indicates a mandatory field
Information About You
I wish to submit an application for a:*
Choose One...
First Name:*
Middle Name:
Please provide if applicable.
Last Name:*
Date of Birth:*
Your Residential Address:*
City:*
Residential Address Country:*
United States of America
State / Province:*
Choose One...



What the User Sees

Users will see no difference in Profile. The **Bank Information** page in Profile is the same for Bambora and WUBS.

Configuration / Feature Activation

To request this feature, contact Concur Client Support.

Product Settings

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur Standard Editions of Expense, Invoice, Travel, and Request to provide clients with a self-service option for setting up SSO for their organization.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Access To Concur** section of Product Settings.

- Single Sign-On can be managed for Standard Travel if it is bundled with Expense, Invoice, and/or Request.
- For standalone Standard Travel, the Manage Single Sign-On feature will be accessible from the **Travel Settings** page.

Other SAP Concur products and services are outside the scope of this initial release.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides a self-service option for setting up SSO.

Configuration / Feature Activation

More information will be coming in a future release note.

Security

Planned Changes Update to File Transfer Authentication

Overview

SAP Concur is planning to update an authentication setting for clients who transfer files to/from SAP Concur. The updated setting will lock out user accounts after five

failed authentication attempts. Some accounts are already using this setting, and this change will update all accounts to this setting. This authentication change does not impact the main SAP Concur application login, only the file transfer process.

Clients who have locked themselves out of their accounts should contact SAP Concur Client Support to unlock their accounts.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security for clients when accessing extract and import files.

Configuration / Feature Activation

This feature will be implemented automatically in a future release.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

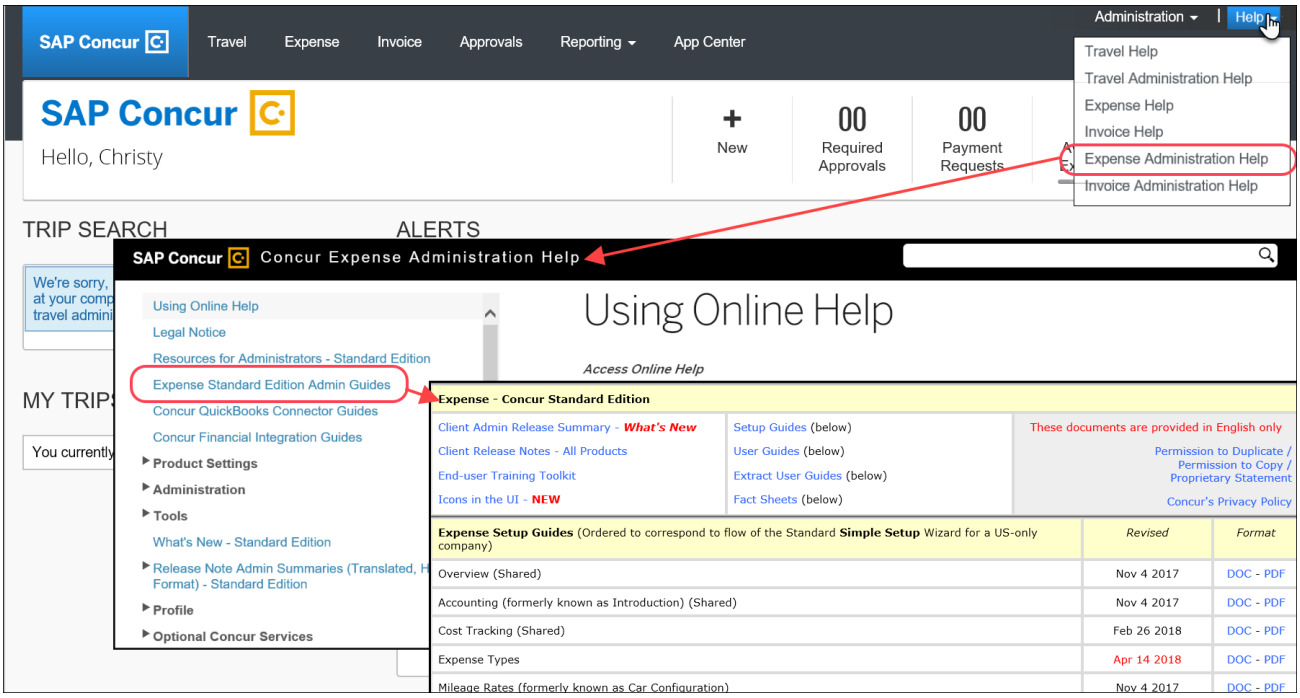
The list of non-affiliated subprocessors is available here: SAP Concur list of Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

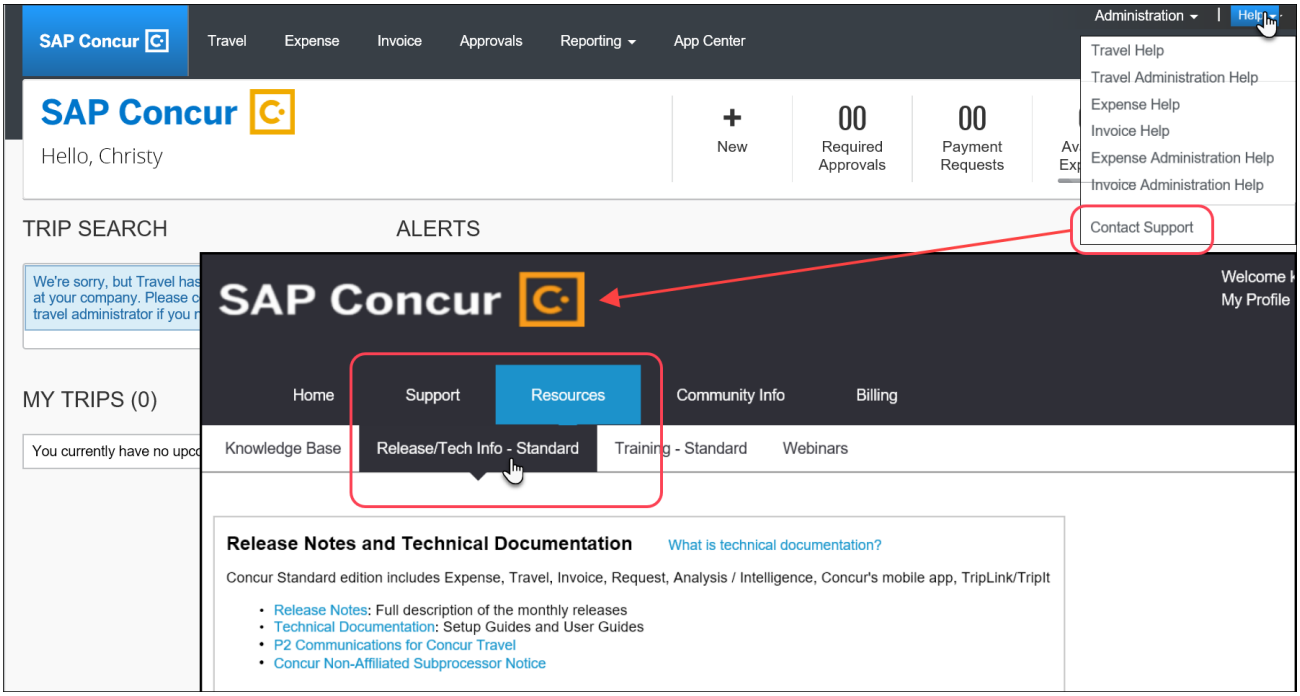
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.

SAP Concur Release Notes **Concur Expense Standard Edition**	
Month	**Audience**
Release Date: September 22, 2018 Initial Post: Friday, September 21, 9:00 AM PT	SAP Concur Client ***FINAL***

Contents

Legal Disclaimer

Release Notes

Admin

Personalized Concur Open

Overview

Concur Open is the SAP Concur service status dashboard, which displays known and widespread outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

Personalized Concur Open became available on September 11.

With the release, there will be new functionality added to Concur Open. SAP Concur users will be able to log in to a personalized view of Concur Open and:

- View service status for the services and the data center that are *specific to their company*
- Access subscription options for updates about the incidents that impact the services *specific to their company*
- View service history for the past two years as well as detailed root cause analysis information and the actions taken by SAP Concur for specific incidents

NOTE: Personalized Concur Open will be available ***in addition to*** Concur Open. Users can continue to access Concur Open and view service availability.

BUSINESS PURPOSE / CLIENT BENEFIT

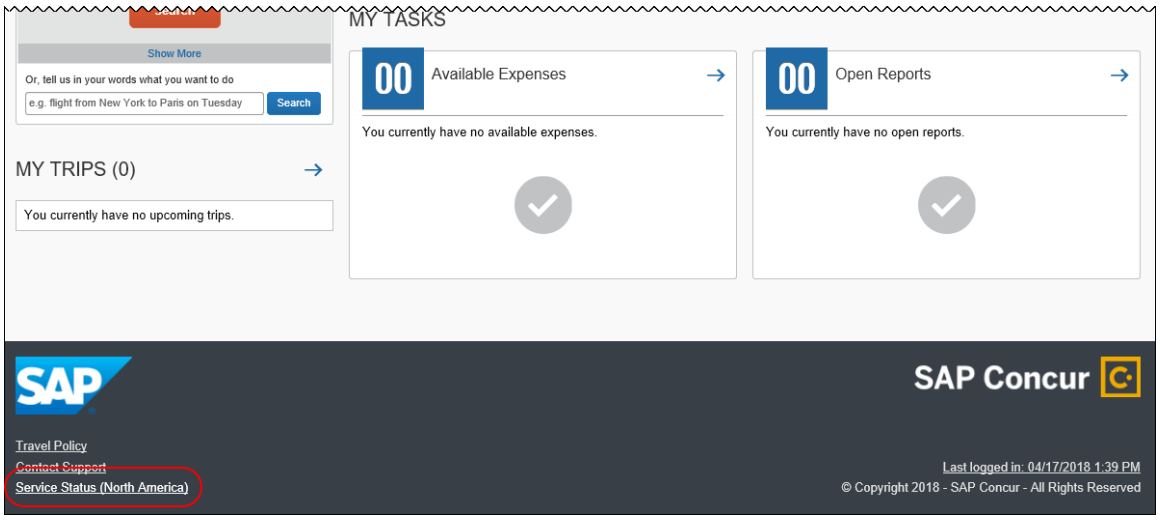
Customers use Concur Open to monitor their SAP Concur services outages, status, and availability. Adding the new functionality will provide customers a personalized view of their service status and availability. SAP Concur's goal is to provide a more accurate and transparent view of incidents/outages.

What the User Sees – Access Concur Open

Users can access Concur Open two ways:

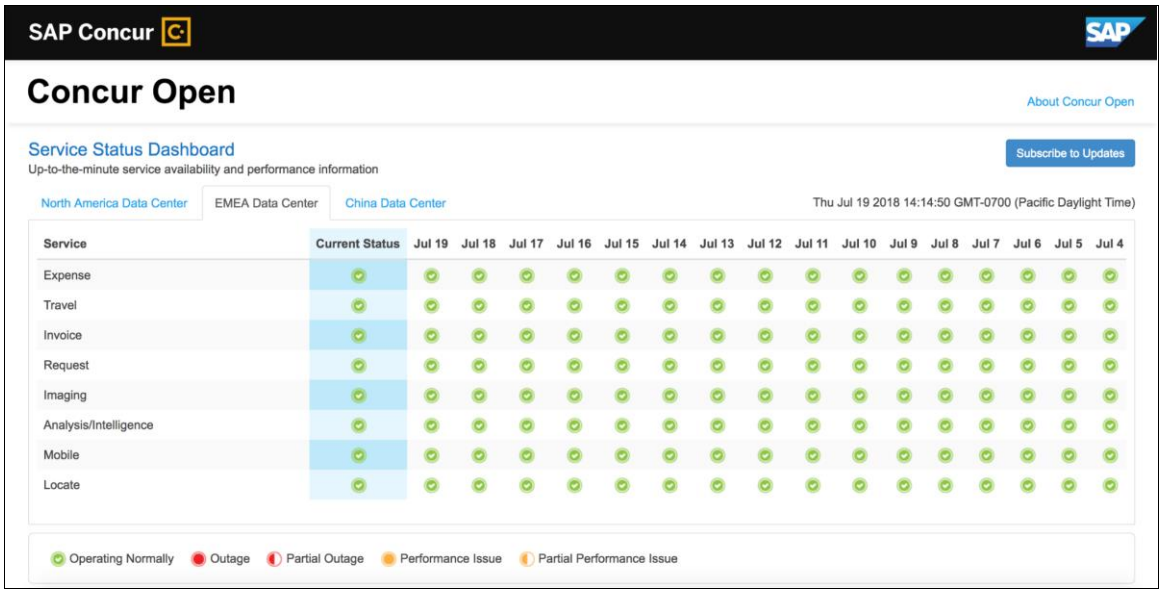
- Enter the public site directly using https://open.concur.com
  – or –

- Sign in to SAP Concur and then click **Service Status** in the lower-left corner of the SAP Concur screen



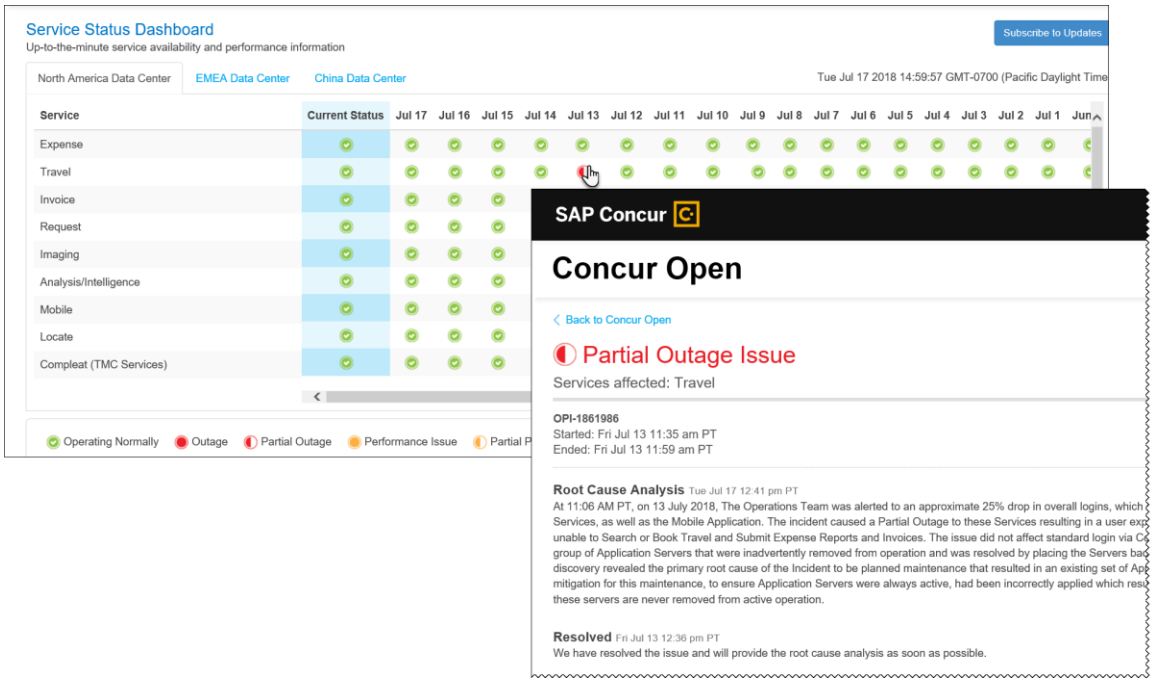
Concur Open appears.

What the User Sees – Current View, Concur Open



In Concur Open, the user sees all data center tabs, the service activity (up to the previous 20 days), and the "service" legend (bottom of the page).

The user can click an icon to review information about service activity.

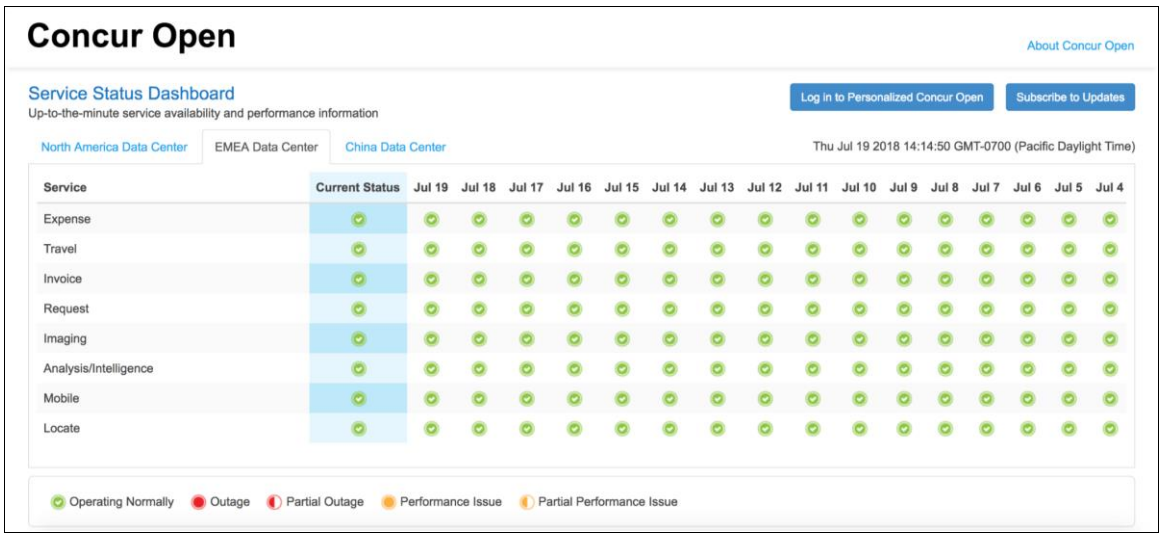


The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New Personalized View and Process

The user will access Concur Open the same way they do now – either via the public site (https://open.concur.com) or after signing in to SAP Concur.

The initial page – regardless of how it is accessed – is similar to the existing page.



On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button – just like they currently do.

With the release of Personalized Concur Open, the main change is that the **Log in to Personalized Concur Open** button also appears on the main page. Whether the user accesses Open via the public site (https://open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access the personalized view requires an SAP Concur sign in.

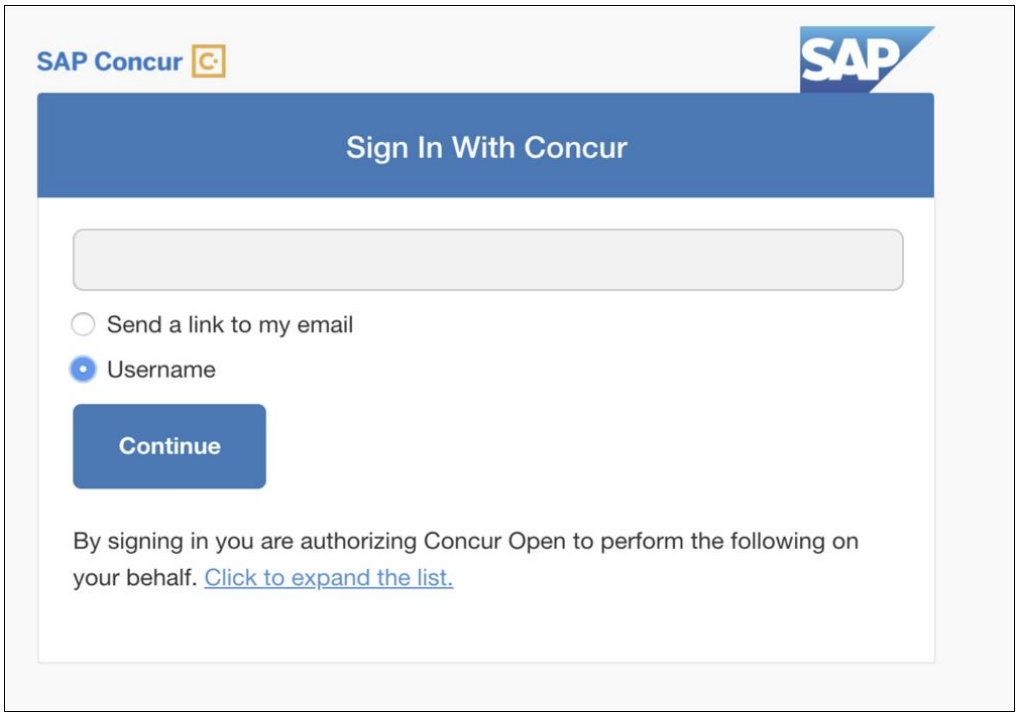
SIGN IN TO THE PERSONALIZED VIEW

NOTE: Initially, please use Internet Explorer, Chrome, or Firefox. Safari will be available later.

The personalized view does not require a new username/password. Instead, users use their existing SAP Concur credentials.

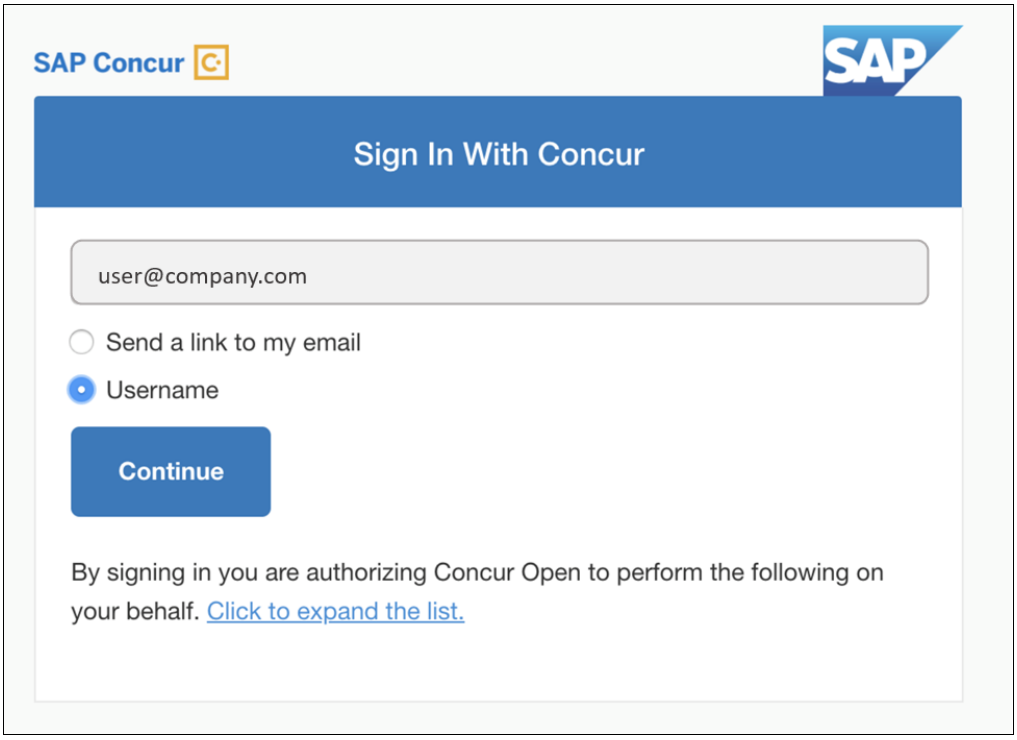
- For customers who do not use SSO, users sign in with their SAP Concur username and password.
- For customers who do use SSO, users can access the personalized view using their email address (described below).

On the main page, the user clicks the **Log in to Personalized Concur Open** button. The **Sign In With Concur** page appears.

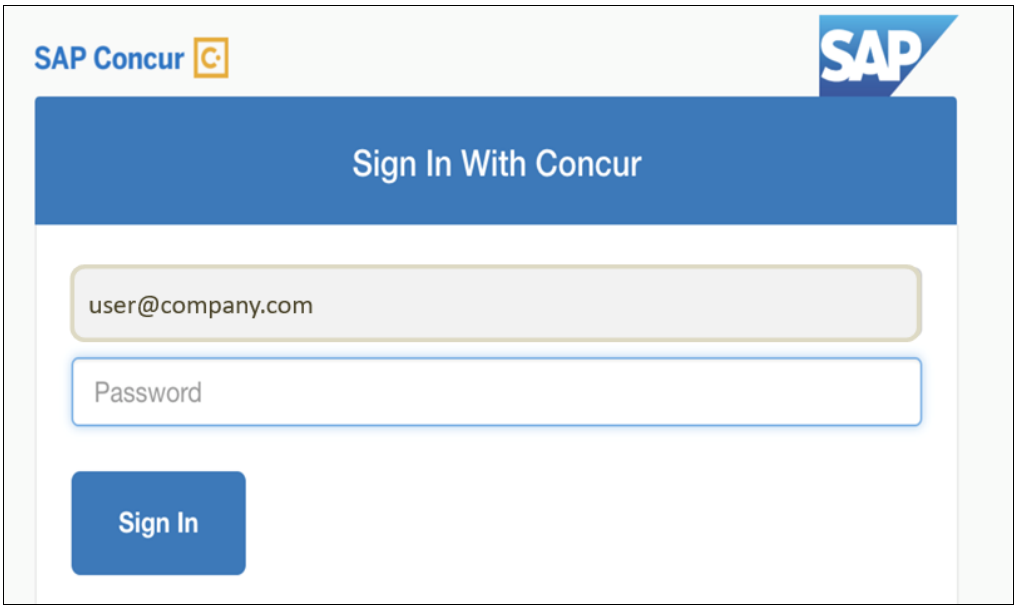


Then, depending on the user's normal sign-in procedure:

- **Username and password:** If the user normally signs in to SAP Concur using their username and password, then – on this page – the user enters their username, clicks **Username** (if necessary), and clicks **Continue**.



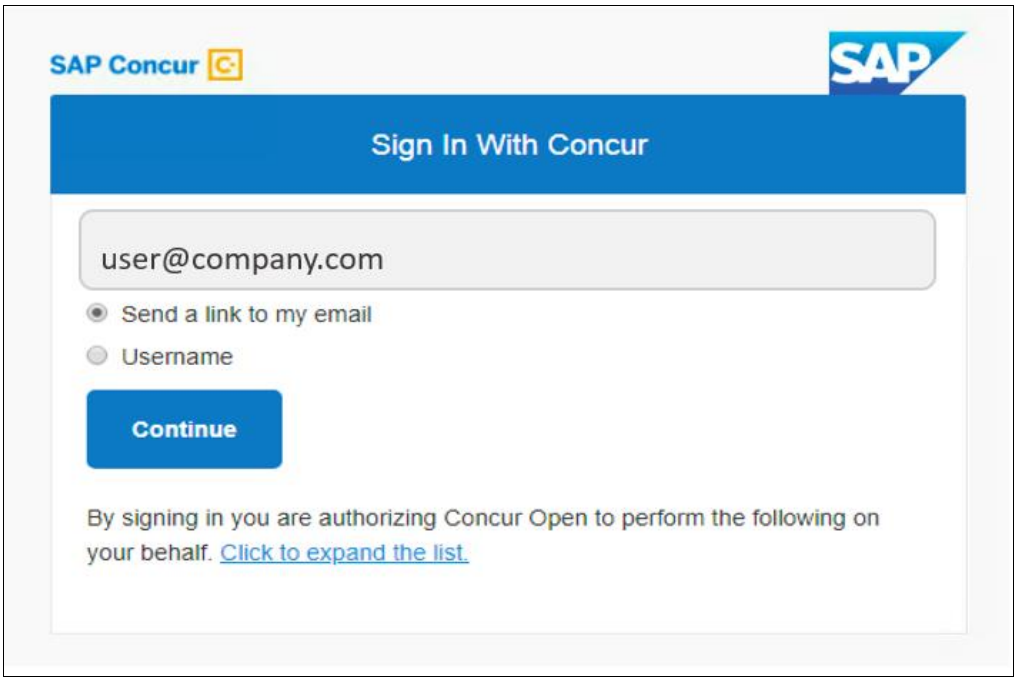
This page appears.



The user enters their password and clicks **Sign In**. The user is then directed to the personalized view.

📖 Refer to *User Remains Signed In* for additional information.

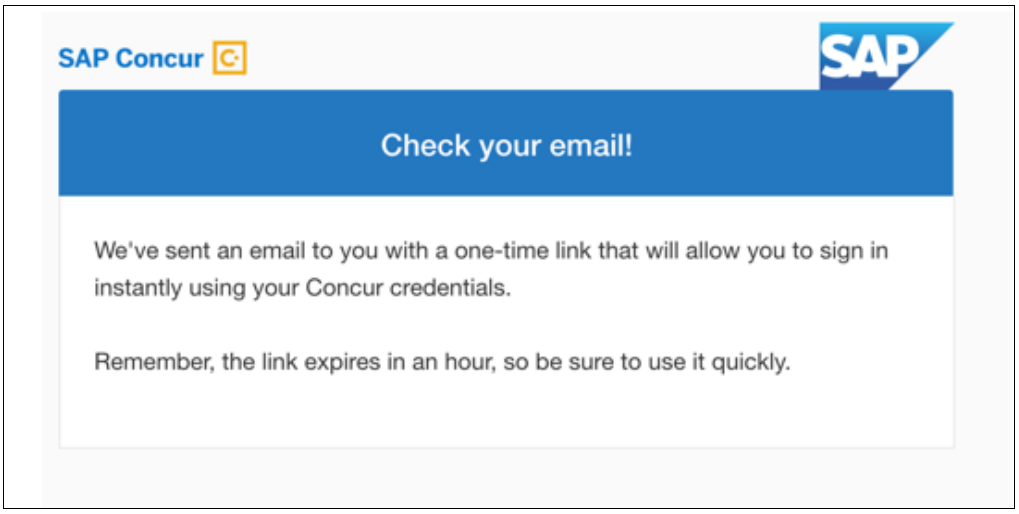
- **SSO:** If the user does not know their SAP Concur sign-in credentials (for example, the user's company uses SSO to access SAP Concur services), then – on this page – the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.



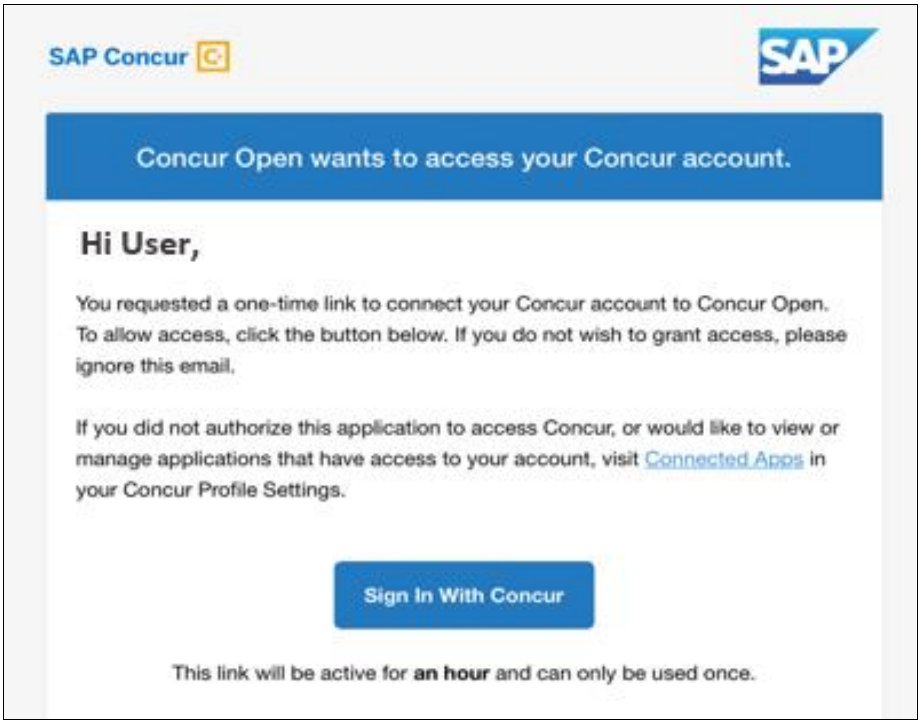
SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

📖 Refer to *SSO – More About Email Addresses in Profile* for more detail.

This message appears.



An email similar to this is sent to the email address.

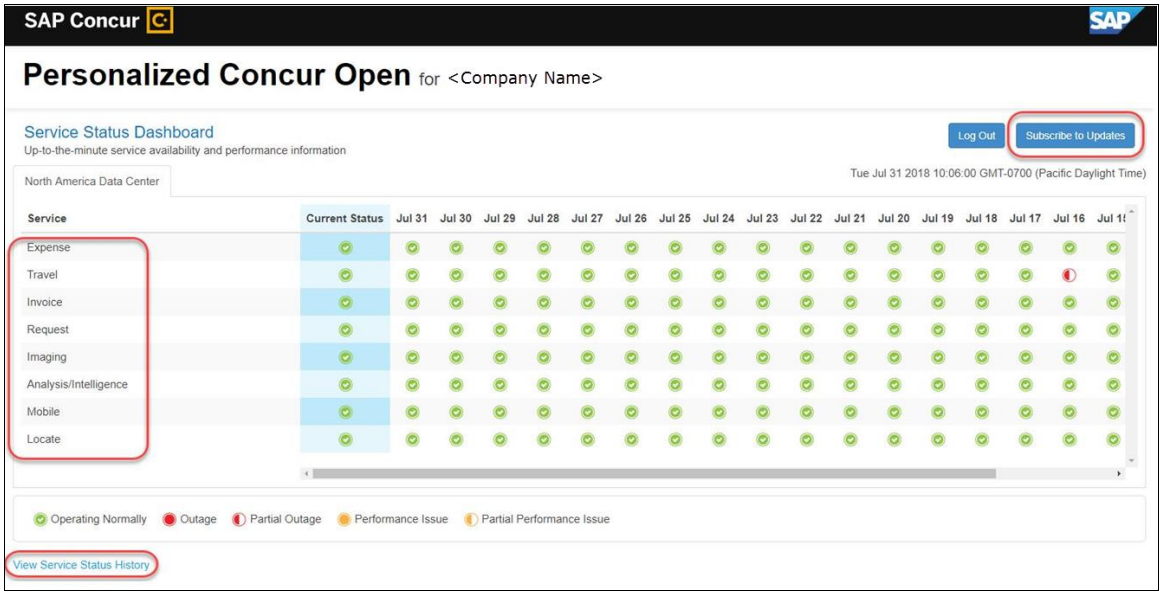


The user clicks **Sign In With Concur**. The user is then directed to the personalized view.

NOTE: The ***one-time*** link is active for ***one hour***. If the user does not click the link within an hour of it being generated, then the user must request another token.

Refer to *User Remains Signed In* for additional information.

Once signed in, the personalized **Service Status Dashboard** page appears.

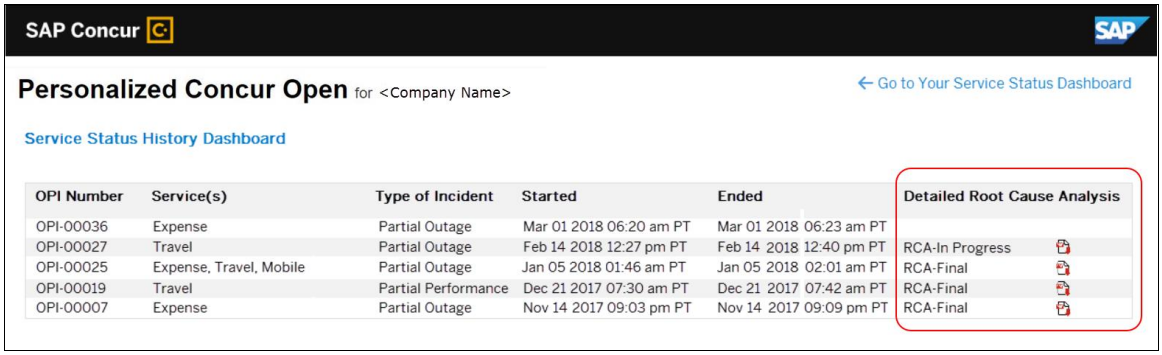


On this page, the user can:

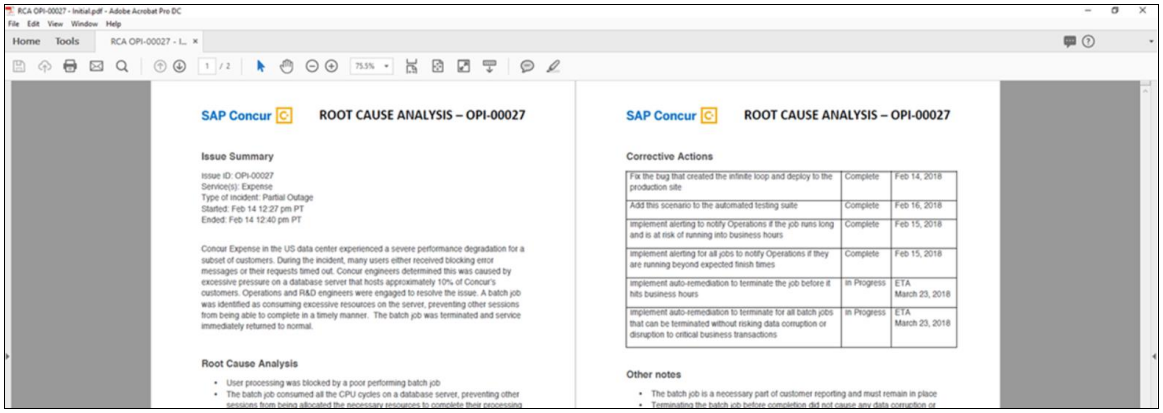
- View:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company.
- Subscribe to updates

View Service History and Incident Analysis

The user clicks **View Service Status History** in the lower-left corner of the page to view the **Service Status History Dashboard** page. It provides history for the past two years, showing the type of each incident as well as the associated start/end time.



The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for specific incidents.

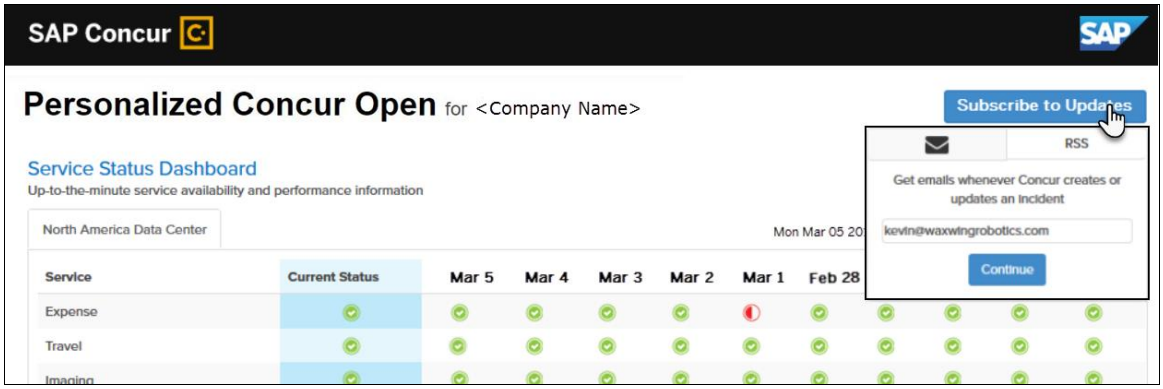


NOTE: Be aware that the detailed root cause analysis PDFs will be available starting around the date that the personalized view becomes available. The service history (start/stop dates and times, type of incident, etc.) will be displayed for the activity of the last two years. However, the root cause analysis PDFs will not be available for every incident and will only be available on a go-forward basis.

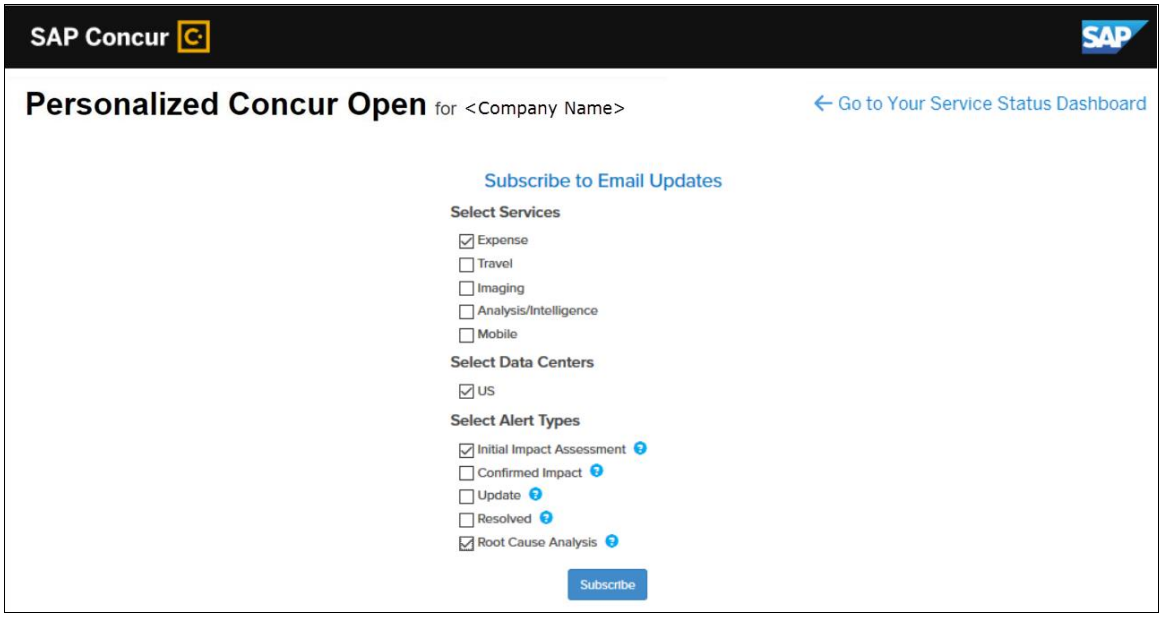
The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

Subscribe to Updates

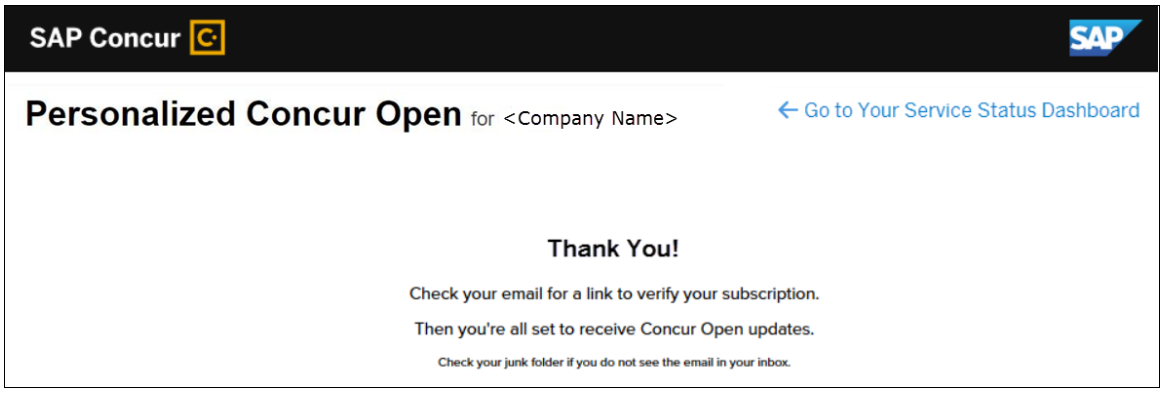
On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed. To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.



The user clicks **Continue**. This page appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert type. The user clicks **Subscribe**. A confirmation message appears.



User Remains Signed In

All users – regardless of whether they signed in via user name/password or via SSO email token – automatically remain signed in for 30 days (via a cookie). In that 30-day period, whether the user enters directly (https://open.concur.com) or they click **Service Status** in the lower-left corner of the SAP Concur screen, they are directed to the generic Concur Open page. When they click **Log in to Personalized Concur Open**, users bypass the login page and go directly to the **Personalized Concur Open** page.

If, during the 30-day period, the user wants to log out, they click **Log Out** on the **Service Status Dashboard** page. (Clearing the cache also terminates the 30-day period.)

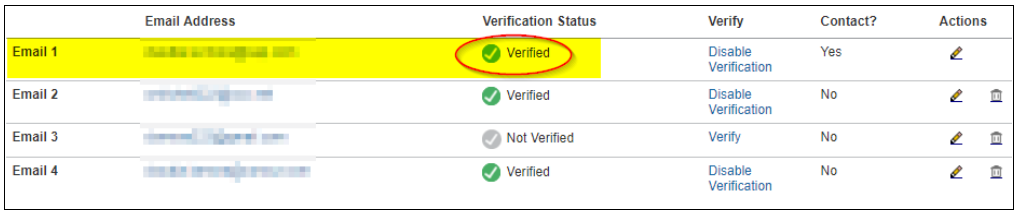
If, during the 30-day period, the customer acquires additional services from SAP Concur, the user should sign out and sign back in, in order to see the new service information.

SSO - More About Email Addresses in Profile

As described above, for SSO users who access Personalized Concur Open via the email token, SAP Concur authenticates the user by comparing the email address entered by the user to the email address in the user's SAP Concur profile.

Note the following:

- The email address that the user enters:
  - Must match the email address in the **Email 1** field in their SAP Concur profile; Email 1 must be "verified."



	Email Address	Verification Status	Verify	Contact?	Actions
Email 1		Verified	Disable Verification	Yes	
Email 2		Verified	Disable Verification	No	
Email 3		Not Verified	Verify	No	
Email 4		Verified	Disable Verification	No	

  - Must be unique to that user; it cannot be shared with multiple people or logins in their company

NOTE: Users can have duplicate (non-unique) email addresses in their profile but ***not*** in the **Email 1** field. Email 1 must be unique.

The notification below could be sent to the user as a result of having the email associated to multiple concur profiles.

Dear Concur User,

An attempt to login or connect to a partner application was made using this email address. We could not authorize this request because of an error. This is most likely because this email address is found to be a duplicate in our system. Please contact your administrator to resolve this issue.

If you did not request to be connected to any partner application, please ignore this email.

Best practice for SSO users – before requesting the token email – is to ensure Email 1 in Profile is accurate and unique.

- If an employee no longer has access to SAP Concur (for example, leaves the company), that employee can no longer access the personalized view. Remember, in order to access the personalized view, they must have a Concur login or an email address in Profile. An inactive user or terminated employee has neither of those things.

Existing Subscription Information

Once the new Personalized Concur Open is available, SAP Concur will make every effort to migrate existing subscriptions to the new view.

For those with subscriptions ***before*** the release of the new Personalized Concur Open, note the following:

- If a user, when subscribing, used their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:
  - Set the user's new subscription to match the company's services and data center in Personalized Concur Open
  - Notify the user (via email) of the change

  NOTE: Best practice – after the personalized view is available – all users should access the subscription page and verify the selected options for accuracy.

- If a user, when subscribing, used their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then SAP Concur will introduce the user (via email) to Personalized Concur Open.

Configuration / Feature Activation

The enhancements will be automatically available; there are no additional configuration or activation steps.

Next Generation (NextGen) Expense

Ongoing New User Interface for Concur Expense End Users

Update: In order to respond to and take advantage of feedback from customers, and to align with SAP Concur's commitment to ensure a smooth and successful transition, we are working on a revised deployment strategy for Next Generation Expense.

Overview

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

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

Customers will have the ability to preview and then opt in to NextGen Expense before the mandatory cutover.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Products and Users Affected

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

These UI changes apply to:

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

IMPORTANT! Timeline and Milestones

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

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

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

- **General Availability (Opt In Period):** Following the Preview Period is General Availability. During this period, NextGen Expense will be complete; all features from the existing UI will be available.

  Customers should use this period to execute their organization's transition plan to the NextGen Expense UI.

- **Mandatory Cutover to NextGen Expense:** A***ll customers will be required to move to NextGen Expense***. This ensures that SAP Concur continues to offer a consistent user experience for all customers and allows for superior product support.

Customers are encouraged to complete the tasks necessary to ensure a smooth transition for their organization during the Preview Period and then transition during General Availability.

Transition Materials – Guides and Other Resources

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

- Professional Edition
- Standard Edition

The links above provide access to the following:

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

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

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

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

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

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

Get Started

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

More Information

Additional information will be available in future release notes.

Plain Text File Transfer Protocol (FTP)

Support for Plain Text FTP Ended on September 1st, 2018

Overview

SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur in November 2017. SAP Concur provided clients an extension until September 1st, 2018 to complete their transition to secure FTP protocols.

⚠ **IMPORTANT:** Any client that has not transitioned to a secure FTP protocol will be unable to download their SAE and other Extract files, or upload Employee, List, Attendee, and other Import files.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations applied a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.

📖 For more information, refer to the *Plain Text FTP Retirement FAQ*.

Configuration / Feature Activation

This maintenance was ***completed on*** September ***1***, 2018.

The actual DNS names impacted by the described change are:

- st.concursolutions.com (North America Data Center)
- st-eu.concursolutions.com (EMEA Data Center)

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

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

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

📖 For more information, please refer to the Client FAQ and the *File Transfer User Guide*.

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

QuickBooks Financial Integration

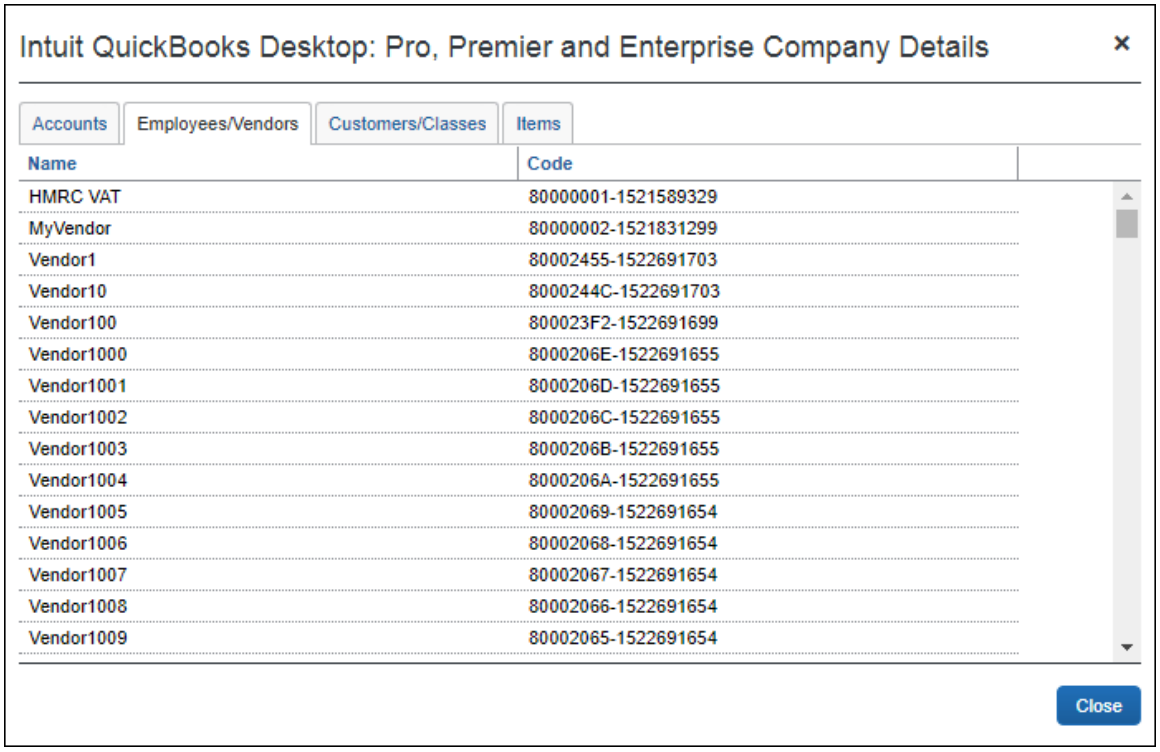
QuickBooks Data Page Updated

Overview

SAP Concur has updated the page displaying the QuickBooks objects synchronized with SAP Concur for clients that use financial integration. This page (accessed from the **Accounting** page of Product Settings) now contains tabs for each type of object synchronized with SAP Concur:

- Accounts
- Employees/Vendors
- Customers/Classes
- Items

The admin can select the desired tab to view the objects, and can now view the Code in addition to the Name for each cost object.



BUSINESS PURPOSE / CLIENT BENEFIT

This update provides a detailed view of the objects synchronized between QuickBooks and SAP Concur, with improved performance.

Configuration / Feature Activation

This feature is only available to clients using the financial integration between SAP Concur and QuickBooks. The feature is automatically on; there are no additional configuration or activation steps.

Uploading Receipt Images

Support for Uploading HTML Ends September 15th, 2018

Overview

Users no longer have the option to upload scanned images of receipts that are formatted as HTML files.

Users will continue to be able to upload receipt images that use the following file formats: PNG, JPG, JPEG, PDF, TIF, and TIFF.

BUSINESS PURPOSE / CLIENT BENEFIT

This change closes a security gap and allows SAP Concur to devote more resources to features that are used by many or most of our clients.

Configuration / Feature Activation

This change is automatically available; there are no configuration or activation steps.

📖 For general information about uploading receipt images, refer to the *Concur's Imaging Service – Overview* Expense End User Help topic.

Planned Changes

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

Admin

Planned Changes Expense Assistant Can Create Trip-based Expense Reports

Overview

Admins can now pre-configure Expense Assistant options.

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

With this enhancement, Expense Assistant can create either of two types of expense reports: calendar-based and trip-based. When Expense Assistant creates a trip-based expense report, Expense Assistant will automatically create an expense report based on a specific trip booked in Concur Travel, and will populate the expense report with the client's expenses that occur between the trip's start and end dates.

Users using Expense Assistant will only be able to have Expense Assistant automatically create calendar-based or trip-based expense reports, not both types of expense reports.

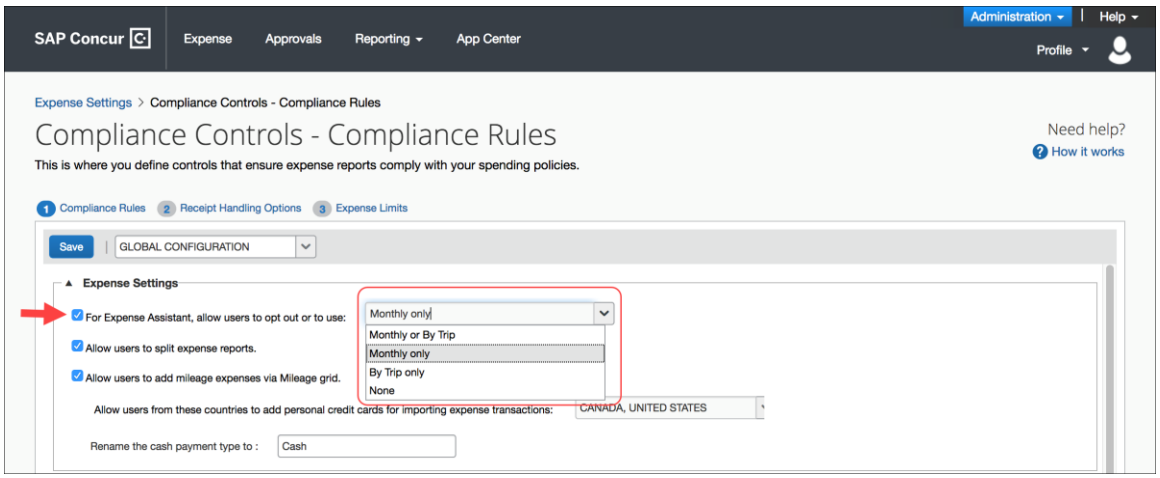
BUSINESS PURPOSE / CLIENT BENEFIT

This feature automates more of the expense reporting process, to provide an easier end user experience.

What the Admin Sees

On the **Expense Settings > Compliance Controls – Compliance Rules** page, the **For Expense Assistant, allow users to opt out or to use** field's list will show the new choices.

With this field, you can determine whether users will be able to enable Expense Assistant for themselves, and if so, whether the expense reports automatically created by Expense Assistant will be calendar-based or trip-based.



As an Expense admin, you can allow your users to choose whether they want to use calendar-based Expense Assistant or trip-based Expense Assistant, but the user can only select one of these options.

Alternatively, you can make the choice for your users, and designate the calendar-based or trip-based option to meet your company's policy.

The following selections are available in the **For Expense Assistant, allow users to opt out or to use** list:

- **Monthly or By Trip** – Users can enable Expense Assistant. If a user enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.
- **Monthly only** – Users can enable calendar-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.
- **By Trip only** – Users can enable trip-based Expense Assistant. If a user enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.
- **None** – Expense Assistant will not be available to users.

Configuration / Feature Activation

For existing clients, your current Expense Assistant configuration remains unchanged.

For new clients, by default, **For Expense Assistant, allow users to opt out or to use** is enabled and *Monthly or By Trip* is selected from the list.

NOTE: While the **For Expense Assistant, allow users to opt out or to use** field is currently available on the **Expense Settings > Compliance Controls – Compliance Rules** page, the trip-based expense report functionality for Expense Assistant is still under development and is not yet available for use.

Before the full functionality becomes available, you can start defining the expense report type Expense Assistant will automatically create for users by making the appropriate selection from the **For Expense Assistant, allow users to opt out or to use** list.

Until the trip-based expense report functionality for Expense Assistant is completed in a future release, Expense Assistant will continue creating calendar-based expense reports for the users if you select the *Monthly or By Trip* or *Monthly* only options in the **For Expense Assistant, allow users to opt out or to use** field.

If you select the *By Trip only* or *None* options, Expense Assistant will be disabled for all your users and they will not see any Expense Assistant functionality.

For more information about Expense Assistant, refer to the *FAQ - Expense Assistant* available from the fact sheet landing page.

Product Settings

Planned Changes Cost Tracking to Have New Look, New Name

Overview

The **Cost Tracking** page in Product Settings will soon have a new look and flow, and a new name. All existing functionality will remain with improved usability for field setup and management.

The new enhancements include the following:

- The **Cost Tracking** page will be renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page will allow client admins to manage custom fields starting from one page. **Linked List** will be renamed to **Multilevel list**.
- A new **Add New Field** page will also be accessible from the **Manage Custom Fields** page. The **Add New Field** page will allow client admins to create fields by selecting the field's type and then selecting field options. Client

admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end user experience.

Configuration / Feature Activation

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

📖 For more information, refer to the *Shared: Cost Tracking Setup Guide*.

More Information

Additional information will be available in future release notes.

Client Notifications

Browser Certifications and Supported Configurations

Monthly Browser Certifications and Supported Configurations

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

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

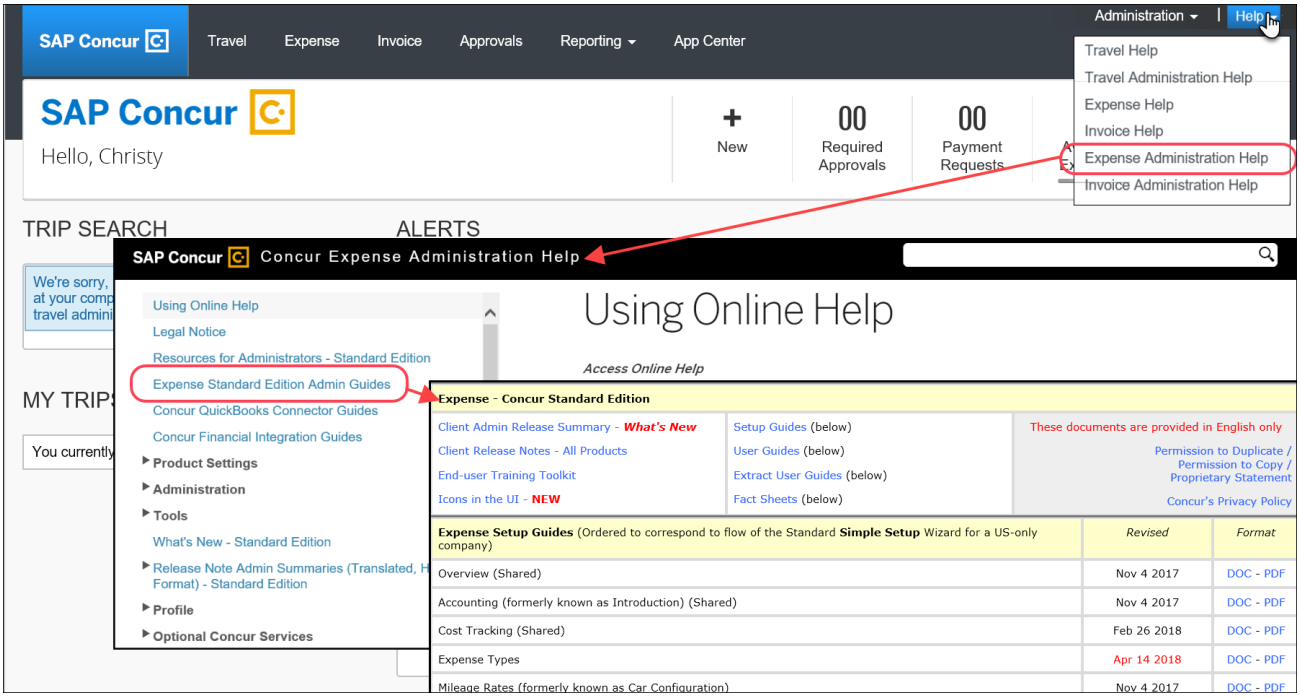
The list of non-affiliated subprocessors is available here: SAP Concur list of Subprocessors

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

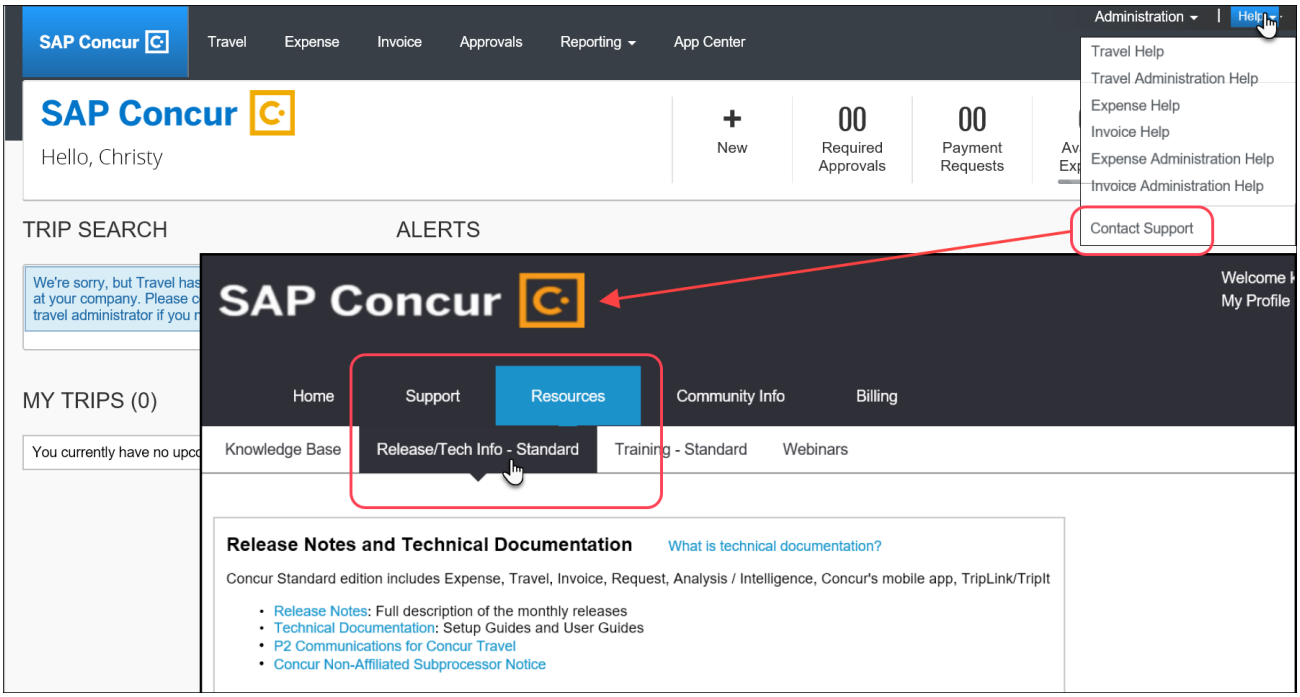
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help.



Concur Support Portal – Selected Users

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

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



Resolved Issues

To check the status of a submitted case, log on to https://concursolutions.com/portal.asp and enter your Case ID.