### SAP Concur Release Notes

# **Concur Expense Standard Edition**

Month	Audience
Release Date: January 20, 2024 Initial Post: January 19, 2024	Client <b>FINAL</b>

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# **Release Notes**

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

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

### **Expense Pay**

### Additional Card Program Now Supported for Europe

### Overview

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

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

### BUSINESS PURPOSE / CLIENT BENEFIT

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

### Administrator Experience

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

Add New Card Program		×
Program Name		
Payment Type	~	
Program Type:	Verify IIN	
Currency		
Active		
Yes	~	
Classic		
	Save Ca	ncel

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

### Configuration / Feature Activation

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

### **Receipts – ExpenseIt for Web**

### ExpenseIt for Concursolutions.com

### Overview

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

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

### **BUSINESS PURPOSE / CLIENT BENEFIT**

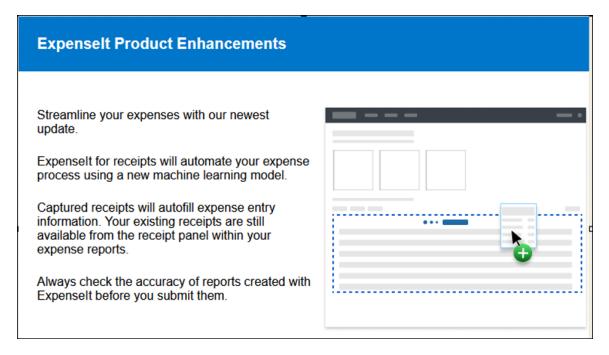
This reduces data entry effort for the end-user and provides the company with expanded awareness and benefit from ExpenseIt.

### Release Schedule

ExpenseIt for Web was released to all customers the week of December 4, 2023. Individual customers were activated over the course of that week.

### End-User Experience

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



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

Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .pdf, .tf or .tff.           Edit         Delete         Combine Expenses         Move to ~         View:         All	
Edit Delete Combine Expenses Move to v	
	I Expenses ~
Receipt     Payment Type ↑↓     Expense Source ↑↓     Expense Type ↑↓     Vendor Details ↑↓     Date       Image: Source ↑↓     Image: Source ↑↓	ate↓∓ Amount↑↓
Available receipts can be accessed by clicking View Available Receipts inside expense reports.	×

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

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

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

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

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

AVAIL	ABLE E	XPENSES					O Uplo	ad Receipt
1 Er	Enable Expense Assistant and these expenses will be placed in a report for you. Learn More							
Drag and	drop files to	upload a new receipt. Valid file types for	upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.					
E						View:	All Expenses	~
	Receipt	Payment Type ↑↓	Expense Source ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	₽↓F	Amount↑↓
	1000 1000 1000	Cash	Expenselt	Parking	Key Center Bellevue	10/1	7/2023	\$24.00
To find mi	issing transa	actions: Card Transactions						
1 Av	ailable rece	eipts can be accessed by clicking Viev	v Available Receipts inside expense repor	rts.				×

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

	Expense Source	Vendor	Date	Amount
ILABLE EXPENSES	Expenselt	Key Center Bellevue	10/17/2023	\$24.00
Enable Expense Assistant and these expenses	W Expense Type *		··· - + 1 of 1 ···	o '
nd drop files to upload a new receipt. Valid file types f	Parking	x ~		
	Vendor		Key Center 601 108th Avenue NE Bellevue, 98004	
Receipt Payment Type 1	Key Center			12
Receipt Payment Type 1	Location		APM 10 10/17/23 16: Receipt 64611	13
	Bellevue	× ~	Short-term parking tkt 1 - No. 031880	
missing transactions. Card Transactions	Date *		10/17/23 10:46 10/17/23 16:13 Period 0d5h28'	
Available receipts can be accessed by clicking Vie	10/17/2023		(Tax) \$24.	
	Amount *		Total \$24. Payment Received	00
	24.00		AID A0000000310 APP LABEL VISA CREE	TIC
	Currency *		AUTHORIZATION 038 TOTAL USD\$24	35D
Policy	US, Dollar (USD)	× ~	APPROVED	
Status (US2)	Comments		Sub Total (21	

### ADDITIONAL CHANGES TO THE USER INTERFACE

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

#### HANDLING OF NON-RECEIPT DOCUMENTS FOR THE EXPENSE REPORT

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

#### **IMPORTANT: THE VERIFICATION STEP**

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

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

#### **DOCUMENT CERTIFICATION/TAX COMPLIANCE**

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

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

#### DISABLING EXPENSEIT

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

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

					Administration -   Help -
SAP Concur 🖸 🕞	Requests Travel	Expense Invoice	Approvals Reporting	r App Center	Profile 👻 💄
Profile Personal Informa	ation Change Passwor	d System Settings	Concur Mobile Registration	n Travel Vacation Reassignment	
Your Information Personal Information Company Information Contact Information Email Addresses Emergency Contact Credit Cards Travel Settings Travel Preferences International Travel Prequent-Traveler Programs Assistants/Arrangers Request Settings Request Delegates Request Approvers Favorite Attendees Expense Settings Expense Delegates Expense Preferences Expense Preferences Expense Preferences Expense Preferences Expense Preferences Expense Preferences Expense Preferences Expense Preferences Expense Preferences Expense Approvers Company Car Favorite Attendees	Save Cancel Select the options that o Send email where Send email where The status of a cash ad A cash advance is subr The status of an exp The status of a cash advance is subr The status of an exp The status of an exp The status of a cash advance is subr The status of an exp The status of a cash advance is subr The status of a cash advance is subr The status of a cash advance is subr The status of a cash advance is subremeted as its subrem	Anne changes itted for approval Sign me up f Expense Assistant u Use Expenselt to n expense report is submitted weraries page my default in the somethod: None	for	uploaded receipts and receipts of	ertain action, such as Submit or Print.

### Configuration / Feature Activation

No end-user action is required: ExpenseIt for the Web was enabled during the week of December 4, 2023, for all end-users on entities that have purchased ExpenseIt.

### Verify

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

### Overview

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

### BUSINESS PURPOSE / CLIENT BENEFIT

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

### Administrator Experience

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

### Example

SAP Concur C Request Travel Exp	ense Invoice A	Approvals App Center			Links -   Help - Profile - 👤
Settings > Verify Audit Profiles					
Verify Audit Profiles					
Add Copy Delete Mai					Manage Groups
○ Profile Name ▼	Expense Policy	y Group ↑↓	Report Auditors	Checks ↑↓	
O Test Profile Name	Expense Pe	licy Groups (2)	Auditors (2)	6	
O Report Auditors Test		Auditors: 2		× 0	
		Auditor Name	Email		
		Jane Doe	jane.doe@acme.com		
		Jody Nunez	jody.nunez@acme.com		
			Manage Auditors		

### Configuration / Feature Activation

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

# **Planned Changes**

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

**NOTE:** The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the <u>Shared Changes Release Notes</u>.

### Miscellaneous

### \*\*Planned Changes\*\* New Action Column Available in Expense Screens

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

### Overview

Targeted for late February 2024, users will use two new action columns indicated by

and <u>...</u>, to perform single click actions or multiple actions such as edit, copy, or delete on the Expense screens, such as editing expense, itemizations, allocations, or travel diaries.

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

### BUSINESS PURPOSE / CLIENT BENEFIT

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

### End-User Experience

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

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

SAI	P Concur	C Expe	nse 👻							?	8
Mana	age Expense	es Card Tra	nsactions	Cash Advances							
Home / E	xpense / Ma	anage Expenses	Business Me	als							
😢 Ale	erts: 13										~
Bus	ines	s Meal	s \$3.4	36.00				Delete Report	Copy Report	Submit	Report
		eport Number:									
Report I	Details 🗸	Print/Share 🗸	Manage Re	eceipts 🗸					View Avail	able Rec	eipts 🗒
Add E	xpense	Edit Delete	Сору	llocate Combine E	expenses Move to V			View:	Standard		~
	Alerts↓↑	Comment↓↑	Receipt↓↑	Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓₹	Amount↓↑	Requested↓↑		~
0	8	F		Cash	Business Meals (Attendees) Attendees (1)	Seattle, Washington	07.07.2023	\$1,200.00	\$1,200.00		
	8	F	1	Cash	Hotel Attendees	Maritim Hotels Seattle, Washington	07.07.2023	\$2,500.00	Edit Delete		~
								\$3,436.00	Copy Allocate	_	
									Move to	>	

The updated Expense screens and their actions are:

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

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

#### FOR EXAMPLE

	e Expenses	Card Transactio	ns Cash Advances			
7.07.202	3 Mar	itim Hotels				
D	etails	Itemization	IS			
Amount \$2,500	0.00		Itemized \$2,236.00	Remaining \$264.00		Receipt
Creat	e Itemizatio	n Edit Delete	Copy Allocate			
	Alerts↓↑	Date†≞	Expense Type↓↑	Requested↓↑		
		04.07.2023	Hotel	\$400.00		
		04.07.2023	Hotel Tax	\$12.00	Edit	
		05.07.2023	Hotel	\$400.00	Delete Copy	
		05.07.2023	Hotel Tax	\$12.00	Allocate	
	8	05.07.2023	Business Meals (Attendees)	\$1,000.00		
		06.07.2023	Hotel	\$400.00		Click to up
		06.07.2023	Hotel Tax	<b>*</b> **		Malial file to
			Hotel Tax	\$12.00	•••	Valid file t
SAP Con	cur 🖸 🛛 E	xpense 👻		\$12.00		⑦         8
SAP Con	_			\$12.00		
Map Atten	ndees			\$12.00		0 8
Map Atten me / Busine	ndees	xpense 🗸		\$12.00		® 8
Map Atten Busine 3 A 3 A 3 A	adees ess Meals (Atten Alerts: 3	xpense 🗸	Attendees: 1 \$1,200.00	\$12.00 © Remaining \$0.00		© 8 ×
Map Atten Busine 3 A 3 A 3 A 3 A 3 A 3 A 3 A 3 A 3 A 3 A	ndees ess Meals (Atten Alerts: 3 nt D0.00	xpense 🗸	Attendes: 1 \$1,200.00	Remaining		© A × ·
Mar Atten Busine 3 A 3 A 3 A 3 A 3 A 3 A 3 A 3 A 3 A 3 A	ndees eass Meals (Atten Alerts: 3 nt 00.00 d Remove	xpense -	Attendees: 1 \$1,200.00 Request Title]† External IDJ† StatusJ† CompanyJ†	Remaining		Post in the second s
Mar Atten me / Busine 3 A S A SUI: Amoun \$1,20 Add	Alerts: 3 Alerts: 3 Alerts: 4 Alerts: 4 Alerts: 4 Alerts: 4	create Group Copy from	Attendees: 1 \$1,200.00	Remaining \$0.00		© A × eport pts ⊟ ···· ·
Atten Atten Busine Atten Busine Atten Busine Atten Busine Atten Busine Atten Busine Atten Busine Atten Busine Atten Atten Busine Atten Atten Busine Atten	Alerts: 3 Alerts: 3 Alerts: 4 Alerts: 4 Alerts: 4 Alerts: 4	xpense   dees)   \$1,200.00  Create Group Copy from ttendee Name f= Attendee	Attendees: 1 \$1,200.00 Request Titlej† External IDj† Statusj† Companyj† christian@ng	© Remaining \$0.00 Custom 08↓↑ Attendee Entry Custom 1↓↑ C		Content of the second sec
Atten me / Busine 3 A 3 A 3 A 3 A 3 A 3 A 3 A 3 A	Alerts: 3 Alerts: 3 Alerts: 4 Alerts: 4 Alerts: 4 Alerts: 4	xpense   dees)   \$1,200.00  Create Group Copy from ttendee Name f= Attendee	Attendees: 1 \$1,200.00 Request Titlej† External IDj† Statusj† Companyj† christian@ng	© Remaining \$0.00 Custom 08↓↑ Attendee Entry Custom 1↓↑ C		O     A
Atten me / Busine Atten Busine Amount SU: Amount SU: Amount SU: Anount Atten Atten Composed Atten Composed Comp	Alerts: 3 Alerts: 3 Alerts: 4 Alerts: 4 Alerts: 4 Alerts: 4	xpense   dees)   \$1,200.00  Create Group Copy from ttendee Name f= Attendee	Attendees: 1 \$1,200.00 Request Titlej† External IDj† Statusj† Companyj† christian@ng	© Remaining \$0.00 Custom 08↓↑ Attendee Entry Custom 1↓↑ C		eport dee Entry Custo
Atten me / Busine Atten Busine Amount SU: Amount SU: Amount SU: Anount Atten Atten Composed Atten Composed Comp	Alerts: 3 Alerts: 3 Alerts: 4 Alerts: 4 Alerts: 4 Alerts: 4	xpense   dees)   \$1,200.00  Create Group Copy from ttendee Name f= Attendee	Attendees: 1 \$1,200.00 Request Titlej† External IDj† Statusj† Companyj† christian@ng	© Remaining \$0.00 Custom 08↓↑ Attendee Entry Custom 1↓↑ C		eport ree Entry Custor Remove Create Group

### Configuration / Feature Activation

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

### **User Interface Changes**

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

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

#### Overview

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

### **BUSINESS PURPOSE / CLIENT BENEFIT**

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

### End-User Experience

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

AP Concur C Expense nage Expenses Card Transad	tions Cash Advances Processo	r ~						0
Expense / Manage Expenses								
nage Expense	es							
ort Library							(@c	reate New R
			attendee 09/11/2021		•			
	SAP Concur 🖸 Exp	ense 🕶			, T			
1/2023	Manage Expenses Card 1	ransactions	Cash Advance	93.00	,			
2.00	Home / Expense / Manage Expense	5	Returned					
med	Manage Expe	nses						
	Report Library		Sent Back Manager N		o Employee			
Back (Returned) to Employee	Report Library		. Harridger H					
mit test 2/2023								
46.00	jimh test	Δ	Jeroen was here	•	Copy: XPR-14934 TEST	0	attendees with personal	0
med	27/11/2023 \$22.00		27/09/2023 <b>\$1,750.86</b>		26/12/2022 \$815.83		16/11/2022 \$1,150.15	
	Returned		AL, / SU.80		Returned		AL, 130.13	
Back (Returned) to Employee			<b> </b>		<b>—</b>		<b>—</b>	
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Sent Back (Returned) to Employ	90	Sent Back (Returned) to Employ	e	Sent Back (Returned) to Employee		Sent Back (Returned) to Employee	
	submit test	A	Test	A	test Comments	8	attendee limit	8
	23/02/2023 <b>\$146.00</b>		<sup>26/09/2022</sup> \$12,673.00		11/02/2022 \$411.98		<sup>09/11/2021</sup> \$13,093.00	
	\$140.00		Returned		Returned		Returned	
	Returned		Returned		_			

### Configuration / Feature Activation

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

### Accessibility

### Accessibility Updates

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

### **Gender Diversity**

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

These planned changes reflect <u>SAP's commitment to supporting gender diversity</u> and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the <u>SAP</u> <u>Concur release notes</u>.

### **In-Product User Assistance**

### **Client Customized Content**

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

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

### Subprocessors

### SAP Concur Non-Affiliated Subprocessors

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

- To access the SAP Concur Sub-processors List:
  - Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page: <u>SAP Sub-processors / Data Transfer Factsheets</u>
  - 2. Sign into the SAP Support Portal using your Support User ID (S-user) and password.

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

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

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

### **Supported Browsers**

### Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the <u>Concur Travel & Expense Supported Configurations</u> guide.

When changes to browser support are planned, information about those changes will also appear in the <u>Shared Changes Release Notes</u>.

# Additional Release Notes and Other Technical Documentation

### **Online Help**

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

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the <u>SAP Concur solutions page</u>.

SAP	Help Portal (Documentation)		,≡,
	ONCUP English (United States of America)  utions help businesses manage employee travel booking and expense rep	vorting.	
This product ▼	Search in all documents related to this product	Q ✓ Advanced Search	
			🛧 Favorite 🛭 😪 Share

### **SAP Concur Support Portal – Selected Users**

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

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



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

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

# Cases

### **Check Support Case Status**

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

- To check the status of a submitted case:
  - 1. Log on to <a href="https://concursolutions.com/portal.asp">https://concursolutions.com/portal.asp</a>.
  - 2. Click Help > Contact Support.

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

- 3. Click **Support > View Cases**.
- 4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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### SAP Concur Release Notes

# **Concur Expense Standard Edition**

Month	Audience
Release Date: February 24, 2024 Initial Post: February 23, 2024	Client <b>FINAL</b>

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# **Release Notes**

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

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

### Cards

### **Retirement of Batch File Option for Unsupported Card Programs**

### Overview

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

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

### **BUSINESS PURPOSE / CLIENT BENEFIT**

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

### THE PAYMENT CARD INTEGRATION SERVICE

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

Image: Section of the section of t	Client agrees to <u>Concur's Click-</u> Through T&C <u>and clicks</u> "Connect"		Client authorizes → access to Concur on → Bank site	Client receives an "Authorization Successful" confirmation on Bank site.
Client selects partner bank from available Enterprise Application in the App Center		"You are now leaving Concur" pop-up appears. Client agrees to continue to Bank site.		

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

### Administrator Experience

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

### Configuration / Feature Activation

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

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

### Yodlee Reauthentication Refresh Frequency

### Overview

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

### BUSINESS PURPOSE

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

### End-User Experience

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

### Administrator Experience

For more information on banks and their reauthorization timelines, see <u>Open Banking</u> <u>Token Expiry Dates</u>.

### Configuration / Feature Activation

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

### Expense Types Redesign

### \*\*Ongoing\*\* Updated User Interface (UI) for Expense Types

Information First Published	Information Last Modified	Feature Target Release Date
August 2023	February 2024	Q3 2023 – <mark>Q4 2024</mark>
Any changes since the prev	ious monthly release are highlighted i	n yellow in this release note.

### Overview

SAP Concur is redesigning the Concur Expense UI experience for Expense Types screens to give product admins a new user experience while creating and managing expense types. These changes will take place between Q3 2023 and throughout 2024.

The redesigned version of Expense Types will become the default version for Concur Expense customers from April 2024. Customers will still have the ability the use the legacy version if they wish to do so until it is no longer available.

### BUSINESS PURPOSE / CLIENT BENEFIT

The new design provides a modern, consistent, and streamlined user experience for Concur Expense admins.

### Products and Users Affected

To take advantage of these improvements, Concur Expense customers will be encouraged to transition to the redesigned version of Expense Types in Concur 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:

- Standard version of Concur Expense
- Admins; there are no changes for end users, approvers, or processors.

### **IMPORTANT:** Timeline and Milestones

There are three important milestones for Concur Expense customers as they transition from the existing legacy UI for Expense Types to the redesigned version.

• Phase 1: October 2023

In October 2023, customers who had the basic configuration of Concur Expense were offered an Opt-In Period, to try out the redesigned Expense Types.

The redesigned version of Expense Types was not available for customers who had advanced features such as Policy Groups, Multiple Country Packs, and so on, enabled for their organization. If the customers with the basic configuration chose to enable advanced settings, then they automatically reverted to the legacy version. Customers used this period to plan their transition and moved to the redesigned Expense Types when it was right for their business priorities.

During the Opt-In Period, not all Concur Expense features from the existing UI were available in the redesigned user interface.

During the first phase, only the **Manage Expense Types** screens was covered under the redesigned version.

**NOTE:** Any decision to opt-in or opt-out was a company-wide decision and was applicable to all the admins in the company.

#### • Phase 2: April 2024

During this period, all customers will automatically default to the redesigned version of **Expense Types**, regardless of the configuration. They will still have the chance to access the legacy screens. These changes will be available from April 2024.

The features planned for this phase will include a First Run Experience for new customers, Policy Groups, Alternate Account Codes, Multiple Country Packs, and Item Code Mapping for financial integrations.

### • Phase 3: TBD

During this period, all customers will be automatically transitioned to the redesigned UI and will not be able to access the legacy screens of Expense Types any longer.

This ensures that we continue to offer a consistent user experience for all customers and allows for superior product innovation and support. We have not yet set a date for these changes.

### Transition Materials – Guides and Other Resources

Customers can use the <u>Concur Expense: Expense Types Setup Guide</u> to learn more about the changes happening in **Expense Types**. Along with the setup guide, we also offer release notes, and other resources to aid in the transition.

To help with training needs, customers can create custom training materials by using the setup guide "as is". They can cut, copy, paste, delete, or otherwise edit either guide at will.

• **Setup guide:** This guide compares the legacy user interface to the redesigned version for Concur Expense to help users become comfortable with the new experience. This guide will be updated as needed during the Opt-In Period as the redesigned UI is being enhanced. Admins should review the guide often.

**NOTE:** The customer can cut, copy, paste, delete, or otherwise edit this guide at will.

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

### **Getting Started**

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

For more information on the exact changes, please refer to the *Expense Types* | \*\**Planned Changes*\*\* *Enhanced Expense Types Administration* planned change in this document.

### Mileage Service

# **Delegate Administrator May Reset Initial Distance Mileage for Personal Car**

### Overview

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

it is necessary to register at least	one venicle.		egating for another user may use the
Sales Car			iguration page to adjust the existing vn in <b>Distance to date</b> .
Ownership *		Ŭ	
Personal	÷	changed to m	rectly, the value in this text box may be natch the desired value, in this case, to
Vehicle Type *		reset the 100	KM to 0.
Car - 4 CV	A V		
Accumulate Distance By			Distance to date
Vehicle			0 KM
Annually	This field requires an int	eger value.	
Start Date	Oistance to date		
2024-01-01			
Distance to date			
100 KM			

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

### BUSINESS PURPOSE / CLIENT BENEFIT

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

### Administrator Experience

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

### Configuration / Feature Activation

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

### **Miscellaneous**

### Enhancing Additional Fields with Most Recently Used (MRU) Feature

### Overview

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

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

### **BUSINESS PURPOSE**

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

### Administrator Experience

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

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

### Configuration / Feature Activation

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

### New Action Column Available in Expense Screens

### Overview

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

None of the existing functionalities are removed with this release:

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

### BUSINESS PURPOSE / CLIENT BENEFIT

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

### End-User Experience

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

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

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Mana	age Expense	es Card Tra	nsactions	Cash Advances							
Home / E	xpense / Ma	nage Expenses	/ Business Me	als							
😢 Ale	erts: 13										~
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								\$3,436.00	Copy Allocate		
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The updated Expense screens and their actions are:

- Reports list
  - View

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

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

#### FOR EXAMPLE

Manag	e Expens	es Card Transaction	ns Cash Advances						
07.07.2023 Maritim Hotels									
Details		Itemization	5						
Amount \$2,500.00			Itemized \$2,236.00	<ul><li>Remaining</li><li>\$264.00</li></ul>		Receipt			
Creat	e Itemiza	tion Edit Delete	Copy Allocate						
$\Box$	Alerts,	l∱ Date†≞	Expense Type↓↑	Requested↓↑					
		04.07.2023	Hotel	\$400.00					
		04.07.2023	Hotel Tax	\$12.00	Edit				
$\Box$		05.07.2023	Hotel	\$400.00	Delete Copy				
$\Box$		05.07.2023	Hotel Tax	\$12.00	Allocate				
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### Configuration / Feature Activation

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

### Update to the Report Status Indicator

### Overview

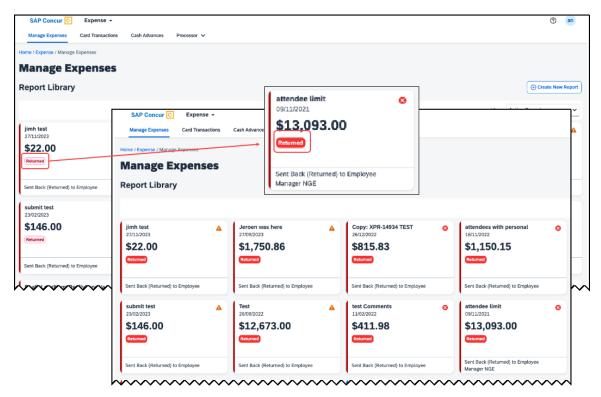
The rectangular indicator that shows the status of an expense report is now updated. With the change, this indicator is more prominent and easier to read than the prior version.

### BUSINESS PURPOSE / CLIENT BENEFIT

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

### End-User Experience

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



### Configuration / Feature Activation

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

# **Planned Changes**

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

**NOTE:** The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the <u>Shared Changes Release Notes</u>.

### **Expense Types**

### \*\*Planned Changes\*\* Enhanced Expense Types Administration

Information First Published	Information Last Modified	Feature Target Release Date				
February 9, 2024	February 23, 2024	April 2024				
Any changes since the previous monthly release are highlighted in yellow in this release note.						

### Overview

Over the next few months, SAP Concur will redesign the Concur Expense UI experience of the **Manage Expense Types** screens to give the product admins a modern, intuitive, and streamlined experience for creating and managing Expense Types.

The redesigned version of Expense Types will become the default version for Concur Expense customers from April 2024. Customers will still have the ability the use the legacy version if they wish to do so until it is no longer available.

Refer to the *Expense Types Redesign* | \*\*Ongoing\*\* Updated User Interface (UI) for Expense Types release note in this document.

Targeted for April 2024, SAP Concur will offer a First Run Experience to new customers setting up Concur Expense for the first time using the Activation Wizard. The First Run Experience is an intuitive, two-step process that will guide new customers in setting up their Expense Types. This experience will not be available to existing customers.

The enhanced features such as Alternate Account Codes, Policy Groups, Multiple Country Packs, and Item Code Mapping for Financial Integration will be offered in the redesigned user interface for all customers.

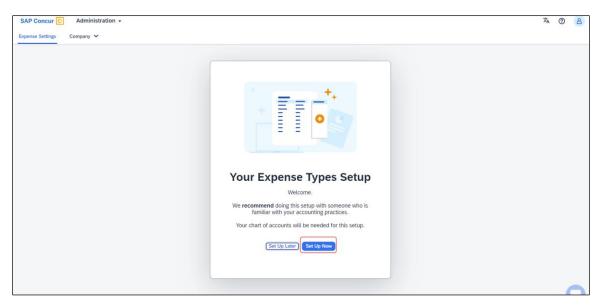
### BUSINESS PURPOSE / CLIENT BENEFIT

This update will facilitate better Expense Types configuration and will reduce complexity, time, and effort involved for administrators when setting up Expense Types.

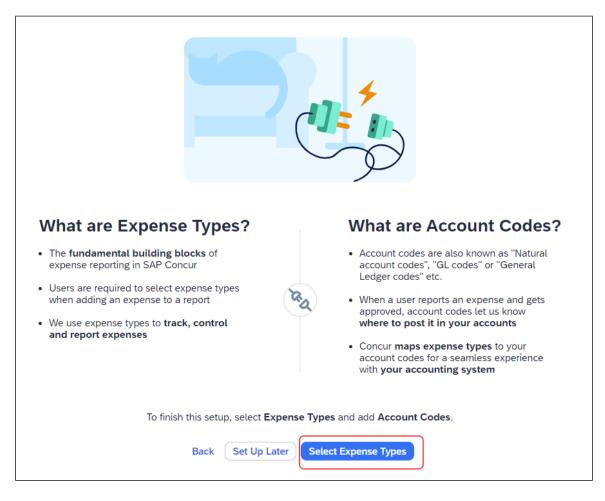
### Administrator Experience

### FIRST RUN EXPERIENCE FOR NEW CUSTOMERS

For the first time set up process, navigate to Expense Types for Expense through the Configuration Wizard to view the **Your Expense Types Setup** welcome screen. Click **Set Up Now** to configure your Expense Types.



An introductory screen will display in the next screen. Proceed to click **Select Expense Types** to continue setting up the Expense Types.



The **Your Expense Types Setup** screen will display. There are two steps in setting up your Expense Types. The step progress bar at the top of the screen will indicate the progress in the setup process.

SAP Concur C Administration -						×4 @ 8
Expense Settings Company V						
Your Expense Types Setu	ıp					
(Select Expense Types)		Add Details and Expense T	ypes)	Finish	n and Manage Setup	Set Up Later Next Step
Select Expense Type						
Suggested expense types based on your profile Items not selected will remain inactive and can b	are pre-selected. De-select those be added after setup is completed	e that are not needed. d. New expense types can be ad	ded in Step 2.			
Search Q					Your Expense Types	
Airfare				A	Airfare	×
Airfare	Airfare Ticket Tax	Airline Fees				
Car Rental						
Car Rental	Car Rental - Insurance					
Company Car - Mileage Reimbursement						
Company Car Mileage				•		0

The first step of the First Run Experience will now display. In the **Select Expense Types** screen, you will check or uncheck the tiles to select your desired expense types.

Concur Expense will display the most used expense types as suggestions. Based on your selections, the **Your Expense Types** list on the right pane shows the selected expense types.

our Expense Types	Setup			(autom)	Countral
Step 1 (Select Expense Types)	Add Details and Expense	se Types)	Finish and Manage Setup	Set Up Later	Next St
elect Expense Ty	ypes				
	r profile are pre-selected. De-select those that are nd can be added after setup is completed. <b>New e</b>		2.		
Search Q			Your	Expense Types	
rfare			Airfare		×
			Busine	ss Meals (Attendees)	×
✓ Airfare	Airfare Ticket Tax	line Fees	Enterta	ainment - Staff	×
☑ Airfare	Airfare Ticket Tax	line Fees.	Enterta	ainment - Staff	×

Toggle between tile view and list view using the button. Use the search box to search for a specific expense type. When you have made your selections, click **Next Step**.

Add Details and New Expense Types
In this step you will <b>learn about</b> as well as add account codes, modify categories, and add new expense types.
Set Up Later Next

Click **Next** to add details to your expense types. The second step of the First Run Experience will display next.

In the **Add Details and Expense Types** screen, you will add details to your expense types such as **Account Codes**, **Category**, **Activation & Limits**, and so on, or even create custom expense types.

The progress bar in the top right will display the number of expense types with complete details.

SAP Concur C Administration -			× 0 8
Expense Settings Company V			
Your Expense Types Setup			
Step 1 (Select Expense Types)	(Add Details and Expense Types)	(口) Finish and Manage Setup	Set Up Later Finish Setup
Account codes are required for all expense types	s to finish the SAP Concur setup.		1/3 Completed
Add Details and Expense Add account codes, set limits for policy groups, select ca You can also add new expense types and expense type of	tegories and rename your expense types.		
Your Expense Types (3) ↓↑	Edit Details Expense Type Name * Airfare		* Required
Airfare Active	Account Code * 😮		
8 Business Meals (Atten Active	123		
S Entertainment - Staff	Category * 💡 Airfare		
			Discard Reset Save and Next

The fully configured expense types will be indicated using a green check mark where it will be listed under **Your Expense Types** section. The red X mark indicates that the account codes are missing. Click **Save and Next** to save the changes.

A success message will display when you complete setting up the Expense Types. The progress bar will reflect the completion status as well.

SAP Concur C Administration -		×a (?) (8)
Expense Settings Company V		
Your Expense Types Setup		Finish Setup
Step 1 (Select Expense Types) (Add Details and Expense Types)	Finish and Manage Setup	
Success! You have added account codes to all expense types.	3/3 Completed	
Add Details and Expense Types		
Add account codes, set limits for policy groups, select categories and rename your expense types. You can also add new expense types and expense type details.		

Click **Finish Setup** to exit the screen. Click **Take me to my Expense Types** to be directed to the **Manage Expense Types** screen. The congratulatory banner will display indicating that the Expense Types are set up successfully. This will indicate the end of the First Run Experience.

	-	8
Expense Settings Company V		
Congratulations! Great job! Let's move on to the next step!	ext St	ep
Manage Expense Types Legacy Experience Import Options More S	etting	ļs
Search     Status     Category       Expense Type Name, Account Code     Q     Active Expense Types     All Categories		⊽×
Your Expense Types (3)     ↓↑     Edit Details     * Require          • Add New Expense Type         Expense Type Name *         Airfare	ired	
Airfare     Active       Business Meals (Attendees)     Active       123	ł	
Entertainment - Staff Active Category * @		
Airfare	ave	

Click **Next Step** to navigate back to the Activation Wizard to complete setting up Concur Expense. You will also be able to postpone setting up your Expense Types if you select **Set Up Later**.

#### **EXISTING UI: POLICY GROUPS: ACTIVATION & LIMITS**

In the existing UI, you can select the preconfigured policy groups in the **Expense Types** screen from the dropdown menu where all the available policy groups for your entity are listed.

not find the expense type you need, click New.	nactive expense types will not be shown to users. If you Forms ④ Attendee Forms ⑤ Trip and E-Receipt Mappings	
Executives Save	Activate Deactivate Folio Type Mapping Import	
Executives	Flag Expenses Over	Don't Allow Expenses Over
Sales		
Bus	100.00	
Business Meals (Attendees)	200.00	500.00
Car Rental	500.00	
Dinner	75.00	
Entertainment - Staff	100.00	500.00
Fuel	75.00	
Hotel	500.00	
Hotel Tax	50.00	

#### **REDESIGNED UI: POLICY GROUPS: ACTIVATION & LIMITS**

In the new experience, when there are multiple country packs, they will display on the **Manage Expense Types** screen, in the **Edit Details > Policy Groups: Activation & Limits** section.

Your Expense Types (9)	ţţ	Edit Details				*Requir
Add New Expen	ве Туре	Users see this form when they s		reate a report.		
Air Fare	1 Active	Policy Groups: Activation & Li Activate expense type for entire co		olicy groups and add limits. The limits are checke	ed when an expense is saved to a report.	^
Airfare	Active	Country/Region	Status	Flag Expense Limit 🚱	Prevent Expense Limit 🚱	
8 Airline Fees	Active	UNITED STATES		1000.00		
🙁 Breakfast	Active	AUSTRALIA				
Cas Bantal		UNITED KINGDOM				

Use the **Status** toggle button to switch on or off the country pack for an entity. When there are policy groups configured for these countries, you will be able to make granular changes to these policy groups as show in the following image. You will be able to set limits, activate or deactivate expense types, and so on.

ense Settings Company 🗸						× ?	Ð
lanage Expense Types					Impor	rt Options More Se	etting
arch	Status		Category		Countries/Regions and Policy Groups		٦
xpense Type Name, Account Code	Q Active Expense Types	~	All Categories	~	All Countries/Regions and Policy Groups	~	5
3 Account codes are required for all expense typ	pes to finish the SAP Concur setup.				5/8 Completed		
Your Expense Types (8)	Edit Details					* Require	ed
Add New Expense Type		ed and will be used when an alternate account code	a is not provided.				
	Policy Groups: Activation & Limit Activate expense type for entire count	ries/regions or specific policy groups and add limits.	The limits are checked when an expe	nse is saved to a report.		^	-
Airfare Active							
	Country/Region	AUSTRALIA Activate All C	Groups Deactivate All Groups				
Airline Fees Active	UNITED STATES	Active Policy Group	Groups Deactivate All Groups Status	Flag Expense Limit 🕢	Prevent Expense Limit 🚱		
Airline Fees     Active	UNITED STATES AUSTRALIA	Active Active Policy Group	Status		Prevent Expense Limit 🕢		
Airline Fees     Active       B Breakfast     Active       car Rental     Active	UNITED STATES AUSTRALIA UNITED KINGDOM	Active Policy Group Active Users Not In Any Group		Flag Expense Limit 🕢	Prevent Expense Limit 🕢		
Aitine Fees     Aitine     Breakfast     Active     Car Rental     Active     Company Car Mileage     Active	UNITED STATES AUSTRALIA	Active Policy Group	Status		Prevent Expense Linit 🕢		
Aitine Fees     Attine     Breakfast     Active     Car Rental     Active     Company Car Mileage     Active	UNITED STATES AUSTRALIA UNITED KINGDOM	Active Policy Group Active Users Not In Any Group Active Set In Any Group	Status	500.00	Prevent Expense Limit		

You will also be able to search using **Countries/Regions and Policy Groups** as a filter in the **Manage Expense Types** screen.

#### **EXISTING UI: ALTERNATE ACCOUNT CODES**

If there are alternate account codes to be set up, you can set up the same in the **Expenses – Expense Types > Account Codes** tab. Select the list item from the account code driver list and configure them.

DEFAULT	Save   Sea	arch: XQ		
DEFAULT Division 1 (001) (Division 2 (002)		Account Code / GL Code	Default Code	
Division 2 (002) Division 3 (003) Division 4 (004)		Dues and Subscriptions		
Division 5 (005) Airfare	<u>)</u>	Travel Expense Travel Expense		
Airline Fees		Travel Expense		
Bank Fees		Dues and Subscriptions		
Breakfast		Meals and Entertainment		
Bus		Travel Expense		
Business Calls		Telephone Expense		
Business Meals (Attendees)		Meals and Entertainment		

#### **REDESIGNED UI: ALTERNATE ACCOUNT CODES**

In the redesigned UI, you will be able to set up alternate account codes in the **Edit Details > Alternate Account Codes** section.

ренье туретивные, ласовыя соце		A Arease types	• nu categories	ла соотпестедола вно голсу стоора	•	P
Account codes are required for al	l expense type	es to finish the SAP Concur setup.		5/8 Completed	_	
Your Expense Types (8)	11	Edit Details			* Require	id
Add New Expense Type		Atternate Account Codes Assign account codes based on the following Custom Field: I The default account code is still required and will be used wh	Department en an alternate account code is not provided.		^	
Air Fare 😗	Active	Account Management	Development	Facilities		
Virfare	Active	A string of numbers, text or both	A string of numbers, text or both	A string of numbers, text or both		
Airline Fees	Active	Finance	Human Resources	Legal		
Breakfast	Active	A string of numbers, text or both	A string of numbers, text or both	A string of numbers, text or both		
		Marketing	Operations	Security		
Car Rental	Active	A string of numbers, text or both	A string of numbers, text or both	A string of numbers, text or both		
S Company Car Mileage	Active	Support				
Custom 1	Active	A string of numbers, text or both				
Taxi	Active					1

#### **EXISTING UI: ITEM CODE MAPPING FOR FINANCIAL INTEGRATIONS**

If you connect Concur Expense to your financial system using one of SAP Concur's financial integrations, you may see options on the **Expense – Account Codes** page specific to your financial system in the legacy UI.

Expense Types 2 Account Codes	3 Expense Forms 4 Attendee Forms 5 Trip and E-Receipt Mapp	ngs	
Save   Search:	× Q		
xpense Type	ERP Account Name or Number	ERP Item Name	
Active Expense Types			
lirfare	Travel		
Breakfast	Meals & Entertainment		
lusiness Meals (Attendees)	Meals & Entertainment		
Car Rental	Travel		
Dinner	Meals & Entertainment		
uel	Car & Truck		
iotel	Travel		
iotel Tax	Travel		
nternet/Online Fees	General & Administrative Expenses		
nventory		Testing Inventory Item	
unch	Meals & Entertainment		
fiscellaneous	General & Administrative Expenses		

#### **REDESIGNED UI: ITEM CODE MAPPING FOR FINANCIAL INTEGRATIONS**

In the redesigned UI, the **Account Code** field becomes **Default Account Code** with a dropdown menu for each expense type.

AP Concur C Administration		×. (?)
	Types experience. We are in the process of phasing out the legacy experience. You may continue to use the legacy experience until it is no longer available. new experience. Use Legacy Experience	
lanage Expense Types		More Settin
earch	Status Category	
Expense Type Name, Account Code	Q Active Expense Types   All Categories	× 1
Your Expense Types (6)	↓↑ Edit Details	* Required
	Expense Type Name *	
Add New Expense Type	Airfare	
Airfare 🛛		
	Default Account Code * 🚱	
Airfare Ticket Tax	Item 1-Inventory	
Airtine Fees	ctive Taxes & Licenses	
Car Rental		
	1 Harris	
	Underegonized Alaset	
Company Car Mileage	Ctive Uncategorized Expense	
	Utilities	,
	(Item) Item 1-inventory account code is not provided.	Ť
	Activation & Limite	

#### Configuration/Feature Activation

The new redesigned version will be automatically made the default version as of April 2024; there are no additional configuration steps.

If you wish to opt out of this experience, click **Use Legacy Experience**. Your view will return to the legacy screens.

SAP Concur 🖸 Administration 🗸						Â	?	aa
Expense Settings Company -								
	new experience for	legacy experience is in the process of being deprecated. You not the most user-friendly formatting Use Legacy Experience	nay	continue to use the legacy experienc	e if you like, until it is dep	_	d. re Settin	Igs
Search Expense Type Name, Account Code	م م	Status Active Expense Types	~	Category All Categories		~	Reset	
Your Expense Types (18)	N	t Details				* Requ	uired	

For more information on the exact changes, refer to the *Expense Types Redesign*| \*\*Ongoing Changes\*\* Updated User Interface (UI) for Expense Types release note in this document. For general information, refer to the *Concur Expense: Expense Types Setup Guide*.

# Accessibility

# Accessibility Updates

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

# **Gender Diversity**

### **Gender Diversity Planned Features and Changes**

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

These planned changes reflect <u>SAP's commitment to supporting gender diversity</u> and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the <u>SAP</u> <u>Concur release notes</u>.

# **In-Product User Assistance**

### **Client Customized Content**

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

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

# Subprocessors

### SAP Concur Non-Affiliated Subprocessors

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

- To access the SAP Concur Sub-processors List:
  - Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page: <u>SAP Sub-processors / Data Transfer Factsheets</u>
  - 2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

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

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

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

# **Supported Browsers**

### Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the <u>Concur Travel & Expense Supported Configurations</u> guide.

When changes to browser support are planned, information about those changes will also appear in the <u>Shared Changes Release Notes</u>.

# Additional Release Notes and Other Technical Documentation

# **Online Help**

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

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the <u>SAP Concur solutions page</u>.

SAP	Help Portal (Documentation)		,≡,
	ONCUT English (United States of America)  utions help businesses manage employee travel booking and expense report	ing.	
This product 🔻	Search in all documents related to this product	Q ✓ Advanced Search	☆ Favorite     ංදී Share

# **SAP Concur Support Portal – Selected Users**

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

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



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

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

# Cases

# **Check Support Case Status**

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

- To check the status of a submitted case:
  - 1. Log on to <a href="https://concursolutions.com/portal.asp">https://concursolutions.com/portal.asp</a>.
  - 2. Click Help > Contact Support.

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

- 3. Click **Support > View Cases**.
- 4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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# **SAP Concur Release Notes**

# **Concur Expense Standard Edition**

Month	Audience
Release Date: March 23, 2024 Update #1: March 26, 2024	Client <b>FINAL</b>

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# **Release Notes**

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

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

# <mark>Audit Rules</mark>

#### Check for Expense Date Within Leave of Absence Date Range

#### Overview

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

#### BUSINESS PURPOSE / CLIENT BENEFIT

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

#### What the Administrator Sees

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

#### TYPES OF LOA

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

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

#### How the Date Ranges are Handled

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

udit Rules		
Audit Rule 2 Conditions 3 Ex	ception	
Insert Remove		Select Operator
Data Object/Operator	Field/Value	Operation Select an appropriate operator this condition.
Entry	✓ Transaction Date	Is Not On This Day
Within Employee Voluntary Leave of A	sence	Is now or in the past (time comp GMT)
Value	♥	Is in the future (time compared t GMT)
		▼ Is Before
		Within Today +
	VA/Hole E	Within Today -
		mployee Voluntary Leave of Not Within Today -
	Absence	Not Equal
		mployee Mandatory Leave of Is On This Day
	Absence	Is Blank
		Equal
		Is Not Blank
		Not Within Today +
		Within Employee Voluntary Lea Absence
		Within Employee Mandatory Lev Absence

Note the following when using this feature:

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

#### Configuration / Feature Activation

Companies wishing to use this new option must:

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

- For more information, refer to the *Concur Expense: Audit Rules Setup Guide*.
- For more information about loading LOA ranges into the user profile, refer to the User API at <u>developer.concur.com</u>.

# **Expense Pay**

# Additional AMEX Corporate Card Programs Now Supported for Europe

#### Overview

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

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

#### BUSINESS PURPOSE / CLIENT BENEFIT

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

#### Administrator Experience

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

Add New Card Program				×
Program Name				
Payment Type		~		
Program Type: American Express - EMEA - Pola	and	~	<u>Verify IIN</u>	
Currency PLN				
Active Yes		~		
Classic Z Pa	ayment Provider			
Corpor	ation Number (CI			
			Save	Cancel

#### End-User Experience

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

#### Configuration / Feature Activation

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

# **Expense Types Redesign**

### **\*\*Ongoing\*\* Updated User Interface (UI) for Expense Types**

Information First Published	Information Last Modified	Feature Target Release Date
August 2023	February 2024	Q3 2023 – Q4 2024
Any changes since the prev	ious monthly release are highlighted i	in yellow in this release note.

#### Overview

SAP Concur is redesigning the Concur Expense UI experience for Expense Types screens to give product admins a new user experience while creating and managing expense types. These changes will take place between Q3 2023 and throughout 2024.

The redesigned version of Expense Types will become the default version for Concur Expense customers from April 2024. Customers will still have the ability the use the legacy version if they wish to do so until it is no longer available.

#### BUSINESS PURPOSE / CLIENT BENEFIT

The new design provides a modern, consistent, and streamlined user experience for Concur Expense admins.

#### Products and Users Affected

To take advantage of these improvements, Concur Expense customers will be encouraged to transition to the redesigned version of Expense Types in Concur 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:

- Standard version of Concur Expense
- Admins; there are no changes for end users, approvers, or processors.

#### **IMPORTANT: Timeline and Milestones**

There are three important milestones for Concur Expense customers as they transition from the existing legacy UI for Expense Types to the redesigned version.

#### • Phase 1: October 2023

In October 2023, customers who had the basic configuration of Concur Expense were offered an Opt-In Period, to try out the redesigned Expense Types.

The redesigned version of Expense Types was not available for customers who had advanced features such as Policy Groups, Multiple Country Packs, and so on, enabled for their organization. If the customers with the basic configuration chose to enable advanced settings, then they automatically reverted to the legacy version. Customers used this period to plan their transition and moved to the redesigned Expense Types when it was right for their business priorities.

During the Opt-In Period, not all Concur Expense features from the existing UI were available in the redesigned user interface.

During the first phase, only the **Manage Expense Types** screens was covered under the redesigned version.

**NOTE:** Any decision to opt-in or opt-out was a company-wide decision and was applicable to all the admins in the company.

#### • Phase 2: April 2024

During this period, all customers will automatically default to the redesigned version of **Expense Types**, regardless of the configuration. They will still have the chance to access the legacy screens. These changes will be available from April 2024.

The features planned for this phase will include a First Run Experience for new customers, Policy Groups, Alternate Account Codes, Multiple Country Packs, and Item Code Mapping for financial integrations.

#### • Phase 3: TBD

#### During this period, all customers will be automatically transitioned to the redesigned UI and will not be able to access the legacy screens of Expense Types any longer.

This ensures that we continue to offer a consistent user experience for all customers and allows for superior product innovation and support. We have not yet set a date for these changes.

#### Transition Materials – Guides and Other Resources

Customers can use the <u>Concur Expense: Expense Types Setup Guide</u> to learn more about the changes happening in **Expense Types**. Along with the setup guide, we also offer release notes, and other resources to aid in the transition.

To help with training needs, customers can create custom training materials by using the setup guide "as is". They can cut, copy, paste, delete, or otherwise edit either guide at will.

- **Setup guide:** This guide compares the legacy user interface to the redesigned version for Concur Expense to help users become comfortable with the new experience. This guide will be updated as needed during the Opt-In Period as the redesigned UI is being enhanced. Admins should review the guide often.
- **NOTE:** The customer can cut, copy, paste, delete, or otherwise edit this guide at will.
- **Release information:** During the Opt-In Period, the release of enhancements will *not* be on the regular release schedule. Instead, SAP Concur will provide special release notes and information about features and enhancements that are nearing release.

#### Getting Started

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

For more information on the exact changes, please refer to the *Expense Types* | \*\**Planned Changes*\*\* *Enhanced Expense Types Administration* planned change in this document.

# Verify

### **Audit Profile: Quick Start Profiles**

#### Overview

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

#### BUSINESS PURPOSE / CLIENT BENEFIT

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

#### Administrator Experience

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

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

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

#### Example

SAP Concur Home V			⑦ VA
	Add Essential Checks	د	<
Product Settings / Verify Audit Profiles / Audit Profile	The following essential checks will be added	to the profile:	
Audit Profile	Checks	Amount Trigger	
Additionic	Incorrect Date	None	* Required
Profile Name *	Incorrect Amount	None	- Kequieu
1.53	Illegible Receipt	None	
Contact Information 🔞	Incorrect Expense Type	None	
	Duplicate Receipt	None	-
			Cancel Save
Checks (0)		Cancel Add Essential Checks	_
Add Delete			
Add Delete			
		17	
	Dulla add as	No Audit Checks	
		sential checks or add checks individually	
	Add C	Add Essential Checks	

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

#### Configuration / Feature Activation

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

#### **Traveler Name Check Update**

#### Overview

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

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

#### BUSINESS PURPOSE / CLIENT BENEFIT

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

#### Administrator Experience

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

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

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

#### Configuration / Feature Activation

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

# **Planned Changes**

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

**NOTE:** The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the <u>Shared Changes Release Notes</u>.

# **Company Card**

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

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

#### Overview

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

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

#### BUSINESS PURPOSE / CLIENT BENEFIT

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

#### Administrator Experience

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

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

Manage Card Programs		Manage Transactions		Margare Lada Tanan			[	View Import Logs	Check CR Acco
Manage Card Programs	Manage Accounts	Manage transactions	ansactions Preview M gee Transactions Manage Lodge Transactions Merchant Code				Settings	view import Logs	UNECK UN ACCO
<ol> <li>Some transactions ma</li> </ol>	ay not be in the syste	m yet. It can take up to	14 days for a bank to post a charge	e and for it to appear in (	loncur. Learn m	sion			
Start Date * 🚱 02/03/2024	End Date * 🚱 03/04/2024	East 4 Dig	its of Card, Name on Card or Empl	ioyee ID Amount	(Minimum) @	Amount (Maxir	num) 😡	Search	Open Filters
Release to Employee	Hide for Employe								
	Date Ofi		Status			Last 4 Digits of Ca	rd Assigne	e Name	
	02/15/2024		Visible to Employee		1359 D08 CBTester				
			Assigned to a Report		1339_000 Chillsten				
	02/15/2024		Hidden for Employee			1358 D08 CRTester			
			Potential Duplicate						
	02/15/2024		Hidden for Employee			13	58 D08 CR	Tester	
	022012027		Posted Prior to Assignment D	late					
	02/15/2024		Hidden for Employee		1358 D08 CRTester		Tester	thar	
L.			Potential Duplicate						
	02/15/2024		Hidden for Employee		58 D08 CR	000 CRTurker			
L.	VERENEVEN		Posted Prior to Assignment D	late		13	10 000 UN		
	02/15/2024		Hidden for Employee				59 D08 CR	-	

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

Start Date * @		End Date * 🕢		Last 4 Digits of Card, Name on Card or Employee ID	Amount (Minimum) 🔞	Amount (Maximum) 🔞			
02/03/2024	8	03/04/2024	8	1234					
Merchant/Vendor				Status	Sub-Status				
				All	Potential Duplicate		~	Search	Close Filters

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



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

/lerchant/Vendor		Status All	*	Sub-Status Potential Duplicate	Search Close Filter
Release to Employee	Hide for Employee				
0	Date @fil	Status		Transaction Hidden ×	
	02/15/2024	Visible to Employee Assigned to a Report		Potential Duplicate	
0	02/15/2024	Hidden for Employee Potential Duplicate		There is already a transaction in Concur with similar attributes. Therefore, this transaction was identified by our system as a duplicate during	
	02/15/2024	Hidden for Employee Posted Prior to Assignment Date		import and hidden. Releasing this transaction will make it visible to the user for addition to an	
P5	02/15/2024	Hidden for Employee		Release this transaction	

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

Date @†1	Status	Last 4 Digits of Card Assignee Name		
02/15/2024	Visible to Employee			
02/10/2024	Assigned to a Report	Transaction Hidden ×		
02/15/2024	Hidden for Employee	Posted Prior to Assignment Date This transaction has been hidden because it is		
02/10/2024	Potential Duplicate			
02/15/2024	Hidden for Employ	posted prior to card assignment date minus		
02/15/2024	Posted Prior to Assignm	transaction release period.		
02/15/2024	Hidden for Employee	Releasing this transaction will make it visible to		
	Potential Duplicate	the user for addition to an expense report.		
02/15/2024	Hidden for Employee	Release this transaction		
02/15/2024	Posted Prior to Assignment Date	Card assignment date: 02/29/2024		
02/15/2024	Hidden for Employee	Currently configured transaction release period:		
02/15/2024	Posted Prior to Assignment Date	5 (days)		
02/15/2024	Hidden for Employee	Modify Transaction Release Setting		
02/15/2024	Potential Duplicate	Please note: Existing transactions imported prior		
	Hidden for Employee	to modifying this setting will need to be		
02/15/2024	Posted Prior to Assignment Date	manually released.		

#### Moving Between the Two Manage Transactions Windows

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

r in Concur. Learn More	Use Previous Experience	×
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#### Configuration / Feature Activation

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

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

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

#### Overview

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

#### BUSINESS PURPOSE / CLIENT BENEFIT

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

#### Administrator Experience

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

P Concur The following import contained one or more new card a automatically assigned to an employee. Click here to view your Unassigned Card Accounts or go	
> Manage Accounts. You can then assign the cards to users as needed.	
Import Name: cdf3 Import	
Run Number : 730	
Run date: 2024-01-22 07:39:23 GMT	
Link To Expense: https://integration.concursolutions.com	

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

Compar	ny Card					
Manage Card Program	Manage Accounts	Manage Transactio	ns Preview Manage Transactions	Manage Lodge Transactions	Merchant Code Mapping	Se
Search By Card Program Type	Any	~				
Search In	Name on Card	<b>~</b>				
Show Only	Unassigned Individual Ad	counts 🗸				
( New Modify	Include Deleted Accoun Include Cancelled Accoun Assign Unassign	ints	tore			
Name on Card†≞	Account Type	Last Segm	Payment Ty			
ADRIAN NORTH	Individual	5678	Corporate C			
AirPlus Lodge Accou	nt Individual	3123	Corporate C			
ALLISON TAYLOR	Individual	8191	Corporate C			

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

#### Configuration / Feature Activation

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

# **Expense Types**

### \*\*Planned Changes\*\* Enhanced Expense Types Administration

Information First Published	Information Last Modified	Feature Target Release Date
February 9, 2024	March 8, 2024	April 16, 2024
Any changes since the prev	ious monthly release are highlighted i	n yellow in this release note.

#### Overview

Over the next few months, SAP Concur will redesign the Concur Expense UI experience of the **Manage Expense Types** screens to give the product admins a modern, intuitive, and streamlined experience for creating and managing Expense Types.

The redesigned version of Expense Types will become the default version for Concur Expense customers from April 16th, 2024. Customers will still have the ability the use the legacy version if they wish to do so until it is no longer available.

Refer to the *Expense Types Redesign* | \*\*Ongoing\*\* Updated User Interface (UI) for Expense Types release note in this document.

Targeted for April 16th, 2024, SAP Concur will offer a First Run Experience to new customers setting up Concur Expense for the first time using the Activation Wizard. The First Run Experience is an intuitive, two-step process that will guide new customers in setting up their Expense Types. This experience will not be available to existing customers.

The enhanced features such as Alternate Account Codes, Policy Groups, Multiple Country Packs, and Item Code Mapping for Financial Integration will be offered in the redesigned user interface for all customers.

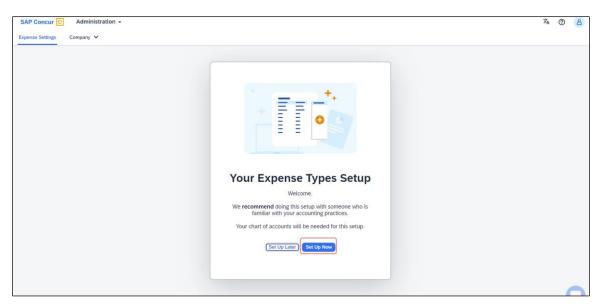
#### BUSINESS PURPOSE / CLIENT BENEFIT

This update will facilitate better Expense Types configuration and will reduce complexity, time, and effort involved for administrators when setting up Expense Types.

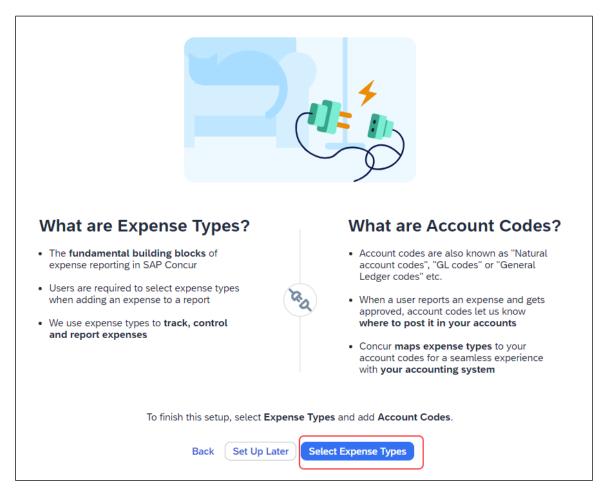
#### Administrator Experience

#### FIRST RUN EXPERIENCE FOR NEW CUSTOMERS

For the first time set up process, navigate to Expense Types for Expense through the Configuration Wizard to view the **Your Expense Types Setup** welcome screen. Click **Set Up Now** to configure your Expense Types.



An introductory screen will display in the next screen. Proceed to click **Select Expense Types** to continue setting up the Expense Types.



The **Your Expense Types Setup** screen will display. There are two steps in setting up your Expense Types. The step progress bar at the top of the screen will indicate the progress in the setup process.

SAP Concur C Administration -						×4 @ 8
Expense Settings Company V						
Your Expense Types Setup						
Step 1 (Select Expense Types)	1	Step 2 (Add Details and Expense T	ýypes)	D Finish	h and Manage Setup	Set Up Later Next Step
Select Expense Types						
Suggested expense types based on your profile are p Items not selected will remain inactive and can be ac	pre-selected. De-select those that are n dded after setup is completed. New exp	not needed. pense types can be ade	ded in Step 2.			
Search Q					Your Expense Types	
Airfare				A	Airfare	×
Airfare	are Ticket Tax	ne Fees				
Car Rental						
Car Rental	Rental - Insurance					
Company Car - Mileage Reimbursement						
Company Car Mileage				•		0

The first step of the First Run Experience will now display. In the **Select Expense Types** screen, you will check or uncheck the tiles to select your desired expense types.

Concur Expense will display the most used expense types as suggestions. Based on your selections, the **Your Expense Types** list on the right pane shows the selected expense types.

ense Settings Company	v			
our Expense Ty	pes Setup			Set Up Later Next St
Step 1 (Select Expense Types)	C Step	2 Details and Expense Types)	Finish and Manage Setup	Set Op Later
elect Expens	e Types			
	d on your profile are pre-selected. De-sele active and can be added after setup is co	ct those that are not needed. mpleted. <b>New expense types can be add</b>	led in Step 2.	
Search (	٩		Your Expense	se Types
			Airfare	×
irfare				
irfare			Business Meal	s (Attendees)
irfare	Airfare Ticket Tax	Airline Fees	Business Meal Entertainment	
✓ Airfare Car Rental	Airfare Ticket Tax	Airline Fees		

Toggle between card view and list view using the button. Use the search box to search for a specific expense type. When you have made your selections, click **Next Step**. Click **Next** to add details to your expense types.

Add Details and New Expense Types
add account codes, modify categories, and add new expense types.

The second step of the First Run Experience will display next.

In the **Add Details and Expense Types** screen, you will add details to your expense types such as **Account Codes**, **Category**, **Activation & Limits**, and so on, or even create custom expense types.

The progress bar in the top right will display the number of expense types with complete details. The fully configured expense types will be indicated using a green

check mark 🖉 where it will be listed under **Your Expense Types** section. The red

X mark <sup>(2)</sup> indicates that the account codes are missing. Click **Save and Next** to save the changes.

SAP Concur C Administration -			× 0 8
Expense Settings Company V			
Your Expense Types Setup	Step 2 (Add Details and Expense Types)	Finish and Manage Setup	Set Up Later Finish Setup
(Setect Expense Types)	(Add Details and Expense Types)		
Account codes are required for all expense type	es to finish the SAP Concur setup.	1/3 Con	npleted
Add Details and Expense Add account codes, set limits for policy groups, select c You can also add new expense types and expense type	ategories and rename your expense types.		
Your Expense Types (3)	Edit Details		* Required
Add New Expense Type	Expense Type Name * Airfare		*
Airfare     Active	Account Code * 🚱		
8 Business Meals (Atten Active	123		
S Entertainment - Staff	Category * 🚱		
	Airfare 🗸		•
		Disca	Reset Save and Next

A success message will display when you complete setting up the Expense Types. The progress bar will reflect the completion status as well. Click **Finish Setup** to exit the screen.

SAP Concur C Administration -		×a ② 🔒
Expense Settings Company V		
Your Expense Types Setup         Step 1         (Select Expense Types)	D Finish and Manage Setup	Finish Setup
Success! You have added account codes to all expense types.	3/3 Completed	
Add Details and Expense Types Add account codes, set limits for policy groups, select categories and rename your expense types. You can also add new expense types and expense type details.		

Next, click **Take me to my Expense Types** to be directed to the **Manage Expense Types** screen. The congratulatory banner will display indicating that the Expense Types are set up successfully. This will indicate the end of the First Run Experience.

SAP Concur C Administration -					х <sub>а</sub> (?	۵ (
Expense Settings Company V						
Congratulations! Great job! Let's move on to the next	step!				Nex	t Step
Manage Expense Types			Legacy Experience	Import Options	More Set	tings
Search Expense Type Name, Account Code	C Active Expense Types	~	Category All Categories		~	₽x
Your Expense Types (3)	Edit Details Expense Type Name * Airfare				* Require	ed
Airfare Active Business Meals (Attendees) Active	Account Code * 🚱					н
Entertainment - Staff Active	Category * 🕑					
	Airfare	~				-
				Res	et Sa	/e

Click **Next Step** to navigate back to the Activation Wizard to complete setting up Concur Expense. You will also be able to postpone setting up your Expense Types if you select **Set Up Later**.

#### **EXISTING UI: POLICY GROUPS: ACTIVATION & LIMITS**

In the existing UI, you can select the preconfigured policy groups in the **Expense Types** screen from the dropdown menu where all the available policy groups for your entity are listed.

Expense - Expense Types ew the lists of Active and Inactive expense types. Inac not find the expense type you need, click New.	tive expense types will not be shown to users. If you ms (4) Attendee Forms (5) Trip and E-Receipt Mappings				
Executives Save Activate Deactivate Folio Type Mapping Import Default United States Group					
Executives	Flag Expenses Over	Don't Allow Expenses Over			
Sales					
Bus	100.00				
Business Meals (Attendees)	200.00	500.00			
Car Rental	500.00				
Dinner	75.00				
Entertainment - Staff	100.00	500.00			
Fuel	75.00				
Hotel	500.00				
	50.00				

#### **REDESIGNED UI: POLICY GROUPS: ACTIVATION & LIMITS**

In the new experience, when there are multiple country packs, they will display on the **Manage Expense Types** screen, in the **Edit Details > Policy Groups: Activation & Limits** section.

Your Expense Types (9)	↓î	Edit Details	alact an expense type to c	reate a report		*Requ
Add New Expense	Туре	Policy Groups: Activation & Li		areate a report.		
Air Fare	Active			olicy groups and add limits. The limits are check	ed when an expense is saved to a report.	^
Airfare	Active	Country/Region	Status	Flag Expense Limit 🚱	Prevent Expense Limit 🚱	
8 Airline Fees	Active	UNITED STATES		1000.00		
😢 Breakfast	Active	AUSTRALIA				
Car Dantal	_	UNITED KINGDOM				

Use the **Status** toggle button to switch on or off the country pack for an entity. When there are **Policy Groups** configured for these countries, you will be able to make granular changes to these policy groups as show in the following image. You will be able to set limits, activate or deactivate expense types, and so on.

SAP Concur C Administration -						XA	1	A
Expense Settings Company V								
Manage Expense Types					Import Optio	ns Mor	ore Setti	ings
Search	Status		Category		Countries/Regions and Policy Groups			1
Expense Type Name, Account Code	Q. Active Expense Types	~	All Categories	~	All Countries/Regions and Policy Groups		~	V.
8 Account codes are required for all expense	e types to finish the SAP Concur setup.				5/8 Completed			• 6
Your Expense Types (8)	Edit Details					* Re	equired	1
Add New Expense Type	Assign account codes based on the following The default account code is still required and	g Custom Field: Department d will be used when an alternate account co	de is not provided.			~	~	
Air Fare 1 Active	Activate avanase time for entire countries/rea	gions or specific policy groups and add limits	s. The limits are checked when an expe	ense is saved to a report.			^	
Airline Fees     Active		AUSTRALIA Activate All	Groups Deactivate All Groups					T
S Breakfast Active		Active Policy Group	Status	Flag Expense Limit 🚱	Prevent Expense Limit 👔			L
Car Rental Active		Active Hours Mat In Any Crown		500.00				L
S Company Car Mileage		Active Users Not In Any Group		500.00				I.
Custom 1 Active		Delta		500.00				
Taxi Active		Bravo		500.00				
						Reset	Save	

You will also be able to search using **Countries/Regions and Policy Groups** as a filter in the **Manage Expense Types** screen.

#### **EXISTING UI: ALTERNATE ACCOUNT CODES**

If there are alternate account codes to be set up, you can set up the same in the **Expenses – Expense Types > Account Codes** tab. Select the list item from the account code driver list and configure them.

1 Expense Types 2 Account Codes	3 Expense Form	Attendee Forms	
DEFAULT	Save   Searc	h: 🛛 🗙 🔍	
DEFAULT - Division 1 (001)		Account Code / GL Code	Default Code
Division 2 (002)			A
Division 3 (003) Division 4 (004)		Dues and Subscriptions	
Division 5 (005)	)	Travel Expense	
Airfare		Travel Expense	
Airline Fees		Travel Expense	
Bank Fees		Dues and Subscriptions	
Breakfast		Meals and Entertainment	
Bus		Travel Expense	
Business Calls		Telephone Expense	
Business Meals (Attendees)		Meals and Entertainment	

#### **REDESIGNED UI: ALTERNATE ACCOUNT CODES**

In the redesigned UI, you will be able to set up alternate account codes in the **Edit Details > Alternate Account Codes** section.

<del>ирение туре П</del> ате, моссыт осное	C nuive cypenae types	· · ··································	Au Countriean egoria anu rointy choipa	
Account codes are required for all exper	ise types to finish the SAP Concur setup.		5/8 Completed	_
Your Expense Types (8)	Edit Details			* Required
Add New Expense Type	Atternate Account Codes Assign account codes based on the following Custom Field The default account code is still required and will be used v	: Department when an alternate account code is not provided.		^
Air Fare 🚯 🔒 🔒	Account Management	Development	Facilities	
Airfare Activ	A string of numbers, text or both	A string of numbers, text or both	A string of numbers, text or both	
Airline Fees	Finance	Human Resources	Legal	
8 Breakfast Activ	A string of numbers, text or both	A string of numbers, text or both	A string of numbers, text or both	
	Marketing	Operations	Security	
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8 Company Car Mileage	Support			
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#### **EXISTING UI: ITEM CODE MAPPING FOR FINANCIAL INTEGRATIONS**

If you connect Concur Expense to your financial system using one of SAP Concur's financial integrations, you may see options on the **Expense – Account Codes** page specific to your financial system in the legacy UI.

Expense Types 2 Account Codes 3 E	Expense Forms (4) Attendee Forms (5) Trip and E-Receipt Mapping		
		3	
Save Search:	× a		
Expense Type	ERP Account Name or Number	ERP Item Name	
O Active Expense Types			
Airfare	Travel		
Breakfast	Meals & Entertainment		
Business Meals (Attendees)	Meals & Entertainment		
Car Rental	Travel		
Dinner	Meals & Entertainment		
Fuel	Car & Truck		
Hotel	Travel		
Hotel Tax	Travel		
Internet/Online Fees	General & Administrative Expenses		
inventory		Testing Inventory Item	
Lunch	Meals & Entertainment		
Miscellaneous	General & Administrative Expenses		
Mobile/Cellular Phone	General & Administrative Expenses		
Office Supplies/Software	General & Administrative Expenses		

#### **REDESIGNED UI: ITEM CODE MAPPING FOR FINANCIAL INTEGRATIONS**

In the redesigned UI, the **Account Code** field becomes **Default Account Code** with a dropdown menu for each Expense Type.

P Concur 🖸 Administration 👻			×4 (?)
nse Settings Company 🗸			
Welcome to the new Manage Expense Types exp	erience. We are in the process of phasing out the legacy experience. You may continue to use	he legacy experience until it is no longer available.	
Please note: We recommend using the new expe			
anage Expense Types			More Settings
rch	Status	Category	
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our Expense Types (6)	Edit Details		* Required
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O Add New Expense Type	Airfare		
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irfare Ticket Tax Active	Item 1-Inventory		
rline Fees Active			
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ar Rental - Insurance Active	Uncategorized Asset		
ompany Car Mileage Active	Uncategorized Expense		
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	(Item) Item 1-Inventory account code is no	t provided.	
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#### Configuration/Feature Activation

The new redesigned version will be automatically made the default version as of April 2024; there are no additional configuration steps.

If you wish to opt out of this experience, click **Use Legacy Experience**. Your view will return to the legacy screens.

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Your Expense Types (18)		t Details			* Req	uired	

For more information on the exact changes, refer to the *Expense Types Redesign*| \*\*Ongoing Changes\*\* Updated User Interface (UI) for Expense Types release note in this document. For general information, refer to the *Concur Expense: Expense Types Setup Guide*.

## Miscellaneous

## \*\*Planned Changes\*\* Keyboard Shortcuts for Expense Screens

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

#### Overview

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

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

#### BUSINESS PURPOSE / CLIENT BENEFIT

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

#### End-User Experience

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

	Keyboard Shortcuts	×	
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#### Configuration / Feature Activation

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

## Reports

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

Information First Published	Information Last Modified	Feature Target Release Date
March 15, 2024		Q2, 2024
Any changes since the prev	ious monthly release are highlighted i	in <mark>yellow</mark> in this release note.

#### Overview

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

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

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

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

#### BENEFIT

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

#### End-User Experience

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

#### Configuration / Feature Activation

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

## Accessibility

## Accessibility Updates

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

## **Gender Diversity**

## **Gender Diversity Planned Features and Changes**

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

These planned changes reflect <u>SAP's commitment to supporting gender diversity</u> and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the <u>SAP</u> <u>Concur release notes</u>.

## **In-Product User Assistance**

## **Client Customized Content**

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

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

## Subprocessors

#### SAP Concur Non-Affiliated Subprocessors

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

- To access the SAP Concur Sub-processors List:
  - Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page: <u>SAP Sub-processors / Data Transfer Factsheets</u>
  - 2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

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

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

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

## **Supported Browsers**

#### **Supported Browsers and Changes to Support**

For information about supported browsers and planned changes to supported browsers, refer to the <u>Concur Travel & Expense Supported Configurations</u> guide.

When changes to browser support are planned, information about those changes will also appear in the <u>Shared Changes Release Notes</u>.

## Additional Release Notes and Other Technical Documentation

## **Online Help**

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

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the <u>SAP Concur solutions page</u>.

SAP	Help Portal (Documentation)		E
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This product 🔻	Search in all documents related to this product	Q. ✓ Advanced Search	
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## **SAP Concur Support Portal – Selected Users**

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

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



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

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

## Cases

## **Check Support Case Status**

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

- To check the status of a submitted case:
  - 1. Log on to <a href="https://concursolutions.com/portal.asp">https://concursolutions.com/portal.asp</a>.
  - 2. Click **Help > Contact Support**.

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

- 3. Click **Support > View Cases**.
- 4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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## SAP Concur Release Notes

## **Concur Expense Standard Edition**

Month	Audience
Release Date: April 2024 Initial Post: April 19, 2024	Client <b>FINAL</b>

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## **Release Notes**

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

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

## **Custom Fields**

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

#### Overview

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

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

#### Administrator Experience

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

#### Configuration / Feature Activation

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

## Expense Types Redesign

## \*\*Ongoing\*\* Updated User Interface (UI) for Expense Types

Information First Published	Information Last Modified	Feature Target Release Date
August 2023	April 12, 2024	Q3 2023 – Q4 2024
Any changes since the prev	ious monthly release are highlighted i	in yellow in this release note.

#### Overview

SAP Concur is redesigning the Concur Expense UI experience for expense types screens to give product admins a new user experience while creating and managing expense types. These changes will take place between Q3 2023 and throughout 2024.

The new design provides a modern, consistent, and streamlined user experience for Concur Expense admins.

As of April 16-17th, 2024, the redesigned version of expense types now becomes the default version for Concur Expense customers. Customers can continue to use the legacy version if they wish to do so until it is no longer available.

#### Products and Users Affected

To take advantage of these improvements, Concur Expense customers will be encouraged to transition to the redesigned version of expense types in Concur 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:

- Standard version of Concur Expense
- Admins; there are no changes for end users, approvers, or processors.

#### **IMPORTANT:** Timeline and Milestones

There are three important milestones for Concur Expense customers as they transition from the existing legacy UI for Expense Types to the redesigned version.

#### • Phase 1: October 2023

In October 2023, customers who had the basic configuration of Concur Expense were offered an Opt-In Period, to try out the redesigned Expense Types.

The redesigned version of expense types was not available for customers who had advanced features such as Policy Groups, Multiple Country Packs, and so on, enabled for their organization. If the customers with the basic configuration chose to enable advanced settings, then they automatically reverted to the legacy version. Customers used this period to plan their transition and moved to the redesigned expense types when it was right for their business priorities.

During the Opt-In Period, not all Concur Expense features from the existing UI were available in the redesigned user interface.

During the first phase, only the **Manage Expense Types** screens was covered under the redesigned version.

**NOTE:** Any decision to opt-in or opt-out was a company-wide decision and was applicable to all the admins in the company.

#### • Phase 2: April 2024

On April 16th, 2024, all customers are automatically made to default to the redesigned version of expense types, regardless of the configuration. They still have the chance to access the legacy screens. These changes are available from April 2024.

The features planned for this phase includes a First Run Experience for new customers, Policy Groups, Alternate Account Codes, Multiple Country Packs, and Item Code Mapping for financial integrations.

#### • Phase 3: TBD

During this period, all customers will be automatically transitioned to the redesigned UI and will not be able to access the legacy screens of expense types any longer.

This ensures that we continue to offer a consistent user experience for all customers and allows for superior product innovation and support. We have not yet set a date for these changes.

#### Transition Materials – Guides and Other Resources

Customers can use the <u>Concur Expense: Expense Types Setup Guide</u> to learn more about the changes happening in expense types. Along with the setup guide, we also offer release notes, and other resources to aid in the transition.

To help with training needs, customers can create custom training materials by using the setup guide "as is". They can cut, copy, paste, delete, or otherwise edit either guide at will.

- **Setup guide:** This guide compares the legacy user interface to the redesigned version for Concur Expense to help users become comfortable with the new experience. This guide will be updated as needed during the Opt-In Period as the redesigned UI is being enhanced. Admins should review the guide often.
- **NOTE:** The customer can cut, copy, paste, delete, or otherwise edit this guide at will.
- **Release information:** During the Opt-In Period, the release of enhancements will *not* be on the regular release schedule. Instead, SAP Concur will provide special release notes and information about features and enhancements that are nearing release.

#### **Getting Started**

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

For more information on the exact changes, please refer to the *Expense Types* | *Enhanced Expense Types Administration* release note in this document.

## **Expense Types**

#### **Enhanced Expense Types Administration**

#### Overview

Over the next few months, SAP Concur will redesign the Concur Expense UI experience of the **Manage Expense Types** screens to give the product admins a modern, intuitive, and streamlined experience for creating and managing expense types.

This update facilitates better configuration and reduces complexity, time, and effort involved for administrators when setting up expense types.

As of April 16-17th, 2024, the redesigned version of expense types is the default version for Concur Expense customers. They will still have the ability the use the legacy version if they wish to do so until it is no longer available.

Refer to the *Expense Types Redesign* | \*\*Ongoing\*\* Updated User Interface (UI) for Expense Types release note in this document.

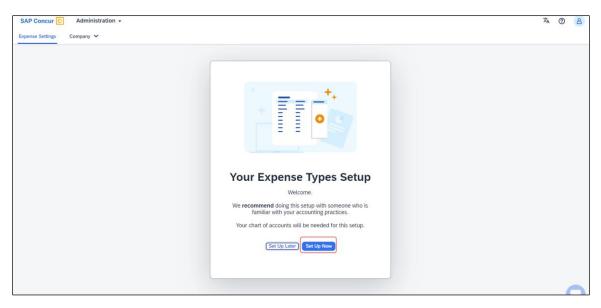
SAP Concur offers a First Run Experience to new customers setting up Concur Expense for the first time using the Activation Wizard. The First Run Experience is an intuitive, two-step process that will guide new customers in setting up their expense types. This experience is not available to existing customers.

The enhanced features such as Alternate Account Codes, Policy Groups, Multiple Country Packs, and Item Code Mapping for Financial Integration are offered in the redesigned user interface for all customers.

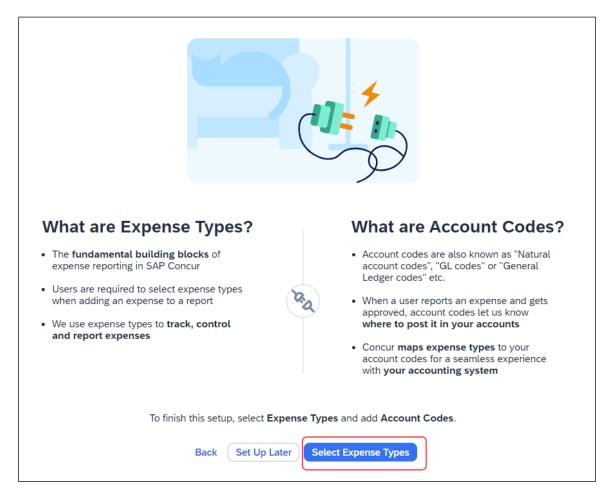
#### Administrator Experience

#### FIRST RUN EXPERIENCE FOR NEW CUSTOMERS

For the first time set up process, navigate to expense types for Expense through the Configuration Wizard to view the **Your Expense Types Setup** welcome screen. Click **Set Up Now** to configure your expense types.



An introductory screen displays in the next screen. Proceed to click **Select Expense Types** to continue setting up the expense types.



The **Your Expense Types Setup** screen displays. There are two steps in setting up your expense types. The step progress bar at the top of the screen indicates the progress in the setup process.

SAP Concur C Administration -			× 0 <u>8</u>
Expense Settings Company V			
Your Expense Types Setup			
(Select Expense Types)	C Step 2 (Add Details and Expense Types)	Finish and	d Manage Setup
Select Expense Types			
Suggested expense types based on your profile are pre-selected. De-select to Items not selected will remain inactive and can be added after setup is comp	hose that are not needed. leted. New expense types can be added in Step 2.		
Search Q			Your Expense Types
Airfare		<u> </u>	Airfare X
Airfare	Airline Fees		
Car Rental			
Car Rental Car Rental - Insurance			
Company Car - Mileage Reimbursement			
Company Car Mileage			0

The first step of the First Run Experience now displays. In the **Select Expense Types** screen, you must check or uncheck the tiles to select your desired expense types.

Concur Expense displays the most used expense types as suggestions. Based on your selections, the **Your Expense Types** list on the right pane shows the selected expense types.

our Expense Typ	es Setup			
Step 1 (Select Expense Types)	C Step (Add	) 2 Details and Expense Types)	Finish and Manage Setup	Set Up Later Next Ste
elect Expense	Types			
	n your profile are pre-selected. De-sele tive and can be added after setup is co	ct those that are not needed. Impleted. New expense types can be add	ded in Step 2.	
Search Q	)		Your Expense	Types
rfare			Airfare	×
Intare				
			Business Meals (A	ttendees) X
	Airfare Ticket Tax	Airline Fees	Business Meals (A Entertainment - St	
Airfare	Airfare Ticket Tax	Airline Fees		

Toggle between card view and list view using the button. Use the search box to search for a specific expense type. When you have made your selections, click **Next Step**. Click **Next** to add details to your expense types.

	_
Add Details and New Expense Types	
In this step you will <b>learn about</b> as well as add account codes, modify categories, and add new expense types. Set Up Later	

The second step of the First Run Experience displays next.

In the **Add Details and Expense Types** screen, you can add details to your expense types such as **Account Codes**, **Category**, **Activation & Limits**, and so on, or even create custom expense types.

The progress bar in the top right displays the number of expense types with complete details. The fully configured expense types are indicated using a green check mark is listed in the **Your Expense Types** section. The red X mark

indicates that the account codes are missing. Click **Save and Next** to save the changes.

SAP Concur C Administration -			× 0 <u>8</u>
Expense Settings Company V			
Your Expense Types Setup	(dd Details and Expense Types)	Finish and Manage Setup	Set Up Later Finish Setup
Generic Expense Types)     Account codes are required for all expense type		1/3 Cc	ompleted • 0
Add Details and Expens Add account codes, set limits for policy groups, select You can also add new expense types and expense type	categories and rename your expense types.		
Your Expense Types (3) Add New Expense Type	Edit Details Expense Type Name * Airfare		* Required
Airfare     Active     Business Meals (Atten     Active	Account Code * 🕢		
S Entertainment - Staff	Category * 🚱 Airfare		Ţ
		Dis	card Reset Save and Next

A success message displays when you complete setting up the expense types. The progress bar reflects the completion status as well. Click **Finish Setup** to exit the screen.

SAP Concur C Administration -		× 0 8
Expense Settings Company V		
Your Expense Types Setup       Step 1       (Setect Expense Types)         Step 2       (Add Details and Expense Types)	Finish and Manage Setup	Finish Setup
Success! You have added account codes to all expense types.	3/3 Completed	
Add Details and Expense Types Add account codes, set limits for policy groups, select categories and rename your expense types. You can also add new expense types and expense type details.		

Next, click **Take me to my Expense Types** to be directed to the **Manage Expense Types** screen. The congratulatory banner displays indicating that the expense types are set up successfully. This indicates the end of the First Run Experience.

SAP Concur 🖸 Administration 🗸				Ż	ζ <sub>Α</sub> ⑦	8
Expense Settings Company V						
Congratulations! Great job! Let's move on to the next	step!				Next	Step
Manage Expense Types	)		Legacy Experience	Import Options N	Nore Setti	ngs
Search Expense Type Name, Account Code	Status           Q         Active Expense Types	~	Category All Categories		~	₽×
Your Expense Types (3)	Edit Details Expense Type Name *				* Required	t e
Airfare Active Business Meals (Attendees) Active	Account Code * 🚱					ł
Entertainment - Staff Active	Category * 🚱 Airfare	~				·
				Reset	Save	

Click **Next Step** to navigate back to the Activation Wizard to complete setting up Concur Expense. You can postpone setting up your expense types if you select **Set Up Later**.

#### LEGACY UI: POLICY GROUPS: ACTIVATION & LIMITS

In the existing UI, you could select the preconfigured policy groups in the **Expense Types** screen from the dropdown menu where all the available policy groups for your entity were listed.

Appense - Expense Types           iew the lists of Active and Inactive expense types. Inactive not find the expense type you need, click New.           Expense Types         (2) Account Codes         (3) Expense Forms		
Executives Save Act	Deactivate Folio Type Mapping Import	
Executives	Flag Expenses Over	Don't Allow Expenses Ove
Sales		
Bus	100.00	
Business Meals (Attendees)	200.00	500.00
Car Rental	500.00	
Dinner	75.00	
Entertainment - Staff	100.00	500.00
Fuel	75.00	
Hotel	500.00	
Hotel Tax	50,00	

#### **REDESIGNED UI: POLICY GROUPS: ACTIVATION & LIMITS**

In the new experience, when there are multiple country packs, they display on the **Manage Expense Types** screen, in the **Edit Details > Policy Groups: Activation & Limits** section.

Your Expense Types (9)	J1	Edit Details				*Requ
Add New Expense Type		Users see this form when they se	elect an expense type to c	reate a report.		
Air Fare () Act	tive)	Policy Groups: Activation & Lin Activate expense type for entire con		licy groups and add limits. The limits are checke	ed when an expense is saved to a report.	^
Airfare	tive	Country/Region	Status	Flag Expense Limit 🕜	Prevent Expense Limit 🔞	
8 Airline Fees	tive	UNITED STATES		1000.00		
8 Breakfast	tive	AUSTRALIA				
Cu Dunit		UNITED KINGDOM				

Use the **Status** toggle button to switch on or off the country pack for an entity. When there are **Policy Groups** configured for these countries, you can make granular changes to these policy groups as show in the following image. You can set limits, activate, or deactivate expense types, and so on.

Administration -						XA	1	A
kpense Settings Company V								
Manage Expense Types					Import Option	ons Mo	ore Setti	ings
arch	Status		Category		Countries/Regions and Policy Groups			1
Expense Type Name, Account Code	Q Active Expense Types	~	All Categories	~	All Countries/Regions and Policy Groups		*	7,
O Account codes are required for all expense	types to finish the SAP Concur setup.				5/8 Completed			
Your Expense Types (8)	Edit Details					*R	Required	1
Or Add New Expense Type	Assign account codes based on the followin The default account code is still required an	ng Custom Field: Department nd will be used when an alternate account coo	de is not provided.				~	
Air Fare O Active	Policy Groups: Activation & Limits Activate expense type for entire countries/r	regions or specific policy groups and add limits	. The limits are checked when an exp	pense is saved to a report.			^	
Arrare     Active     Active	Country/Region	AUSTRALIA Activate All	Groups Deactivate All Groups					Ì
Breakfast Active	UNITED STATES	Active Policy Group	Status	Flag Expense Limit 🚱	Prevent Expense Limit 🚱			L
ar Rental Active	AUSTRALIA	Active	-					L
Company Car Mileage	CANADA	Active Users Not In Any Group		500.00				I.
Custom 1 Active		Delta		500.00				
Taxi Active		Bravo		500.00				
						Reset	Save	۵,

You can search using **Countries/Regions and Policy Groups** as a filter in the **Manage Expense Types** screen.

#### LEGACY UI: ALTERNATE ACCOUNT CODES

If there are alternate account codes to be set up, you could set up the same in the **Expenses – Expense Types > Account Codes** tab. You were able to select the list item from the account code driver list and configure them.

1 Expense Types 2 Account Codes 3 Exp	ense Forms 4 Attendee Forms		
DEFAULT Save	Search: XQ		
DEFAULT Division 1 (001)	Account Code / GL Code	Default Code	
Division 2 (002)			<b>^</b>
Division 3 (003) Division 4 (004)	Dues and Subscriptions		
Division 5 (005)	Travel Expense		
Airfare	Travel Expense		
Airline Fees	Travel Expense		
Bank Fees	Dues and Subscriptions		
Breakfast	Meals and Entertainment		
Bus	Travel Expense		
Business Calls	Telephone Expense		
Business Meals (Attendees)	Meals and Entertainment		

#### **REDESIGNED UI: ALTERNATE ACCOUNT CODES**

In the redesigned UI, you can set up alternate account codes in the **Edit Details > Alternate Account Codes** section.

препле туре нате, лесоит соце	A Prove Expense Types	• mi careBoines	ма соопшестковные вного стора	
Account codes are required for all expense	types to finish the SAP Concur setup.		5/8 Completed	_
Your Expense Types (8)	Edit Details			* Required
Add New Expense Type	Atternate Account Codes Assign account codes based on the following Custom Field: The default account code is still required and will be used wi	Department hen an alternate account code is not provided.		^
Air Fare () Active	Account Management	Development	Facilities	
Airfare Active	A string of numbers, text or both	A string of numbers, text or both	A string of numbers, text or both	
Airline Fees     Active	Finance	Human Resources	Legal	
Breakfast     Active	A string of numbers, text or both	A string of numbers, text or both	A string of numbers, text or both	
	Marketing	Operations	Security	
Car Rental Active	A string of numbers, text or both	A string of numbers, text or both	A string of numbers, text or both	
S Company Car Mileage	Support			
Custom 1 Active	A string of numbers, text or both			
Taxi				

#### LEGACY UI: ITEM CODE MAPPING FOR FINANCIAL INTEGRATIONS

If you connected Concur Expense to your financial system using one of SAP Concur's financial integrations, you were able to see options on the **Expense – Account Codes** page specific to your financial system in the legacy UI.

Expense Types 2 Account Codes 3	Expense Forms (4) Attendee Forms (5) Trip and E-Receipt Mapping	5	
Save   Search:	XQ	-	
Expense Type	ERP Account Name or Number	ERP Item Name	
Active Expense Types			
Airfare	Travel	][	
Breakfast	Meals & Entertainment		
Business Meals (Attendees)	Meals & Entertainment		
Car Rental	Travel		
Dinner	Meals & Entertainment		
Fuel	Car & Truck		
Hotel	Travel		
Hotel Tax	Travel		
Internet/Online Fees	General & Administrative Expenses		
Inventory		Testing Inventory Item	
Lunch	Meals & Entertainment		
Miscellaneous	General & Administrative Expenses		
Mobile/Cellular Phone	General & Administrative Expenses		
Office Supplies/Software	General & Administrative Expenses		

#### **REDESIGNED UI: ITEM CODE MAPPING FOR FINANCIAL INTEGRATIONS**

In the redesigned UI, the **Account Code** field becomes **Default Account Code** with a dropdown menu for each Expense Type.

P Concur 🖸 Administ	ration 👻				x <sub>a</sub> ⑦
ense Settings Company 🗸					
	xpense Types experience. We are in sing the new experience. Use Legac		perience. You may continue to use the legacy	experience until it is no longer available.	
anage Expense T	/pes				More Setting
irch		Status		Category	
pense Type Name, Account Code		Q Active Expense T	ypes	<ul> <li>All Categories</li> </ul>	~ 7
Add New Expense Ty	Airfare		~		
Car Rental	Active Travel				
Car Rental - Insurance	Active Uncatego	rized Asset			
Company Car Mileage	Active Uncatego	rized Expense	r.		
	Utilities				×
		m 1-Inventory	account code is not provided.		
	Activation I	1 imite			

#### Configuration/Feature Activation

The new redesigned version is automatically made the default version as of April 2024; there are no additional configuration steps.

If you wish to opt out of this experience, click **Use Legacy Experience**. Your view will return to the legacy screens.

Expense Settings Company V			Х́а ⑦ СА
Manage Expense Types		Legary Experience	e Import Options More Settings
Search	Status	Category	

For more information on the exact changes, refer to the *Expense Types Redesign*| \*\*Ongoing Changes\*\* Updated User Interface (UI) for Expense Types release note in this document. For general information, refer to the *Concur Expense: Expense Types Setup Guide*.

## Mileage Service

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

#### Overview

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

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

#### Configuration / Feature Activation

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

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

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

## Miscellaneous

#### **Keyboard Shortcuts for Expense Screens**

#### Overview

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

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

#### End-User Experience

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

SAP Concur Expense 🗸				() AE
Manage Expenses Card Transactions	Cash Ad	Keyboard Shortcuts	×	
		On 💽		
Home / Expense / Manage Expenses		Expense Home		
Manage Expenses		Action	Keyboard Shortcut	
Report Library		Show Keyboard Shortcuts	<u>۵</u> <i>I</i>	( ← Create New Report
		Create New Report	n	
		Upload New Receipt	u	View: Active Reports
XPR-49059 02/12/2024	<b>Te</b> 02	Scroll to Report Library	Υ c	
\$40.00	\$	Scroll to Available Expenses	τe	
Not Submitted	N			
Available Expenses				
<b>i</b> Enable Expense Assistant and these expe	enses will be	placed in a report for you. Learn More		
Drag and drop files to upload a new receipt. Valid	d file types fo	r upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.		

SAP Concur Expense V					?	AE
Manage Expenses Card Transactions Cash Ad	Keyboard Shortcuts	×				
Home / Expense / Manage Expenses / XPR-49059	on					
Alerts: 2	Action	Keyboard Shortcut				~
1 There are cash advances available to add to this report	Show Keyboard Shortcuts	<u></u>				×
	Go to Expense Home	g e				
XPR-49059 \$40.00	Add Expense	n	Delete Report	Copy Report	Submit R	Report
Not Submitted   Report Number: 6N4ZS6	View report header	1				
Report Details V Print/Share V Manage Receipts V	Submit Report	s		View Availa	ble Recei	ipts 틙
Add Expense Edit Delete Copy Allocate	Copy Report	c	View:	Detail		~
☐ Alerts↓↑ Receipt↓↑ Payment Type↓↑ Ex	Delete Report	d 11	Amount↓↑	Receipt Status↓↑	Date	
Cash Lu	Toggle Receipt Panel	∵ 2 hin	e, \$40.00 ngton	N	02/0:	

SAP Concur Expense 🗸	(	Keyboard Shortcuts	×		? AE
Manage Expenses Card Transactions	Cash Ad				
ome / Expense / Manage Expenses / XPR-49	059 / Lunch	Expense Entry Page			
Alerts: 1		Action	Keyboard Shortcut		
A You must attach a receipt image to this	xpense.	Show Keyboard Shortcuts	☆ /		
🗆 🔿 Lunch \$40	.00	Go to Expense Home	g e	Cancel Delete Expense	Save Expe
2/01/2024		Go to Report Page	g c		
Details Itemizations		Save Expense	τs	Hide	Receipt
		Delete Expense	d		
() Allocate		Toggle Receipt Panel	X 2		
Expense Type *		Upload New Receipt	u t	CFDi	
Lunch		View Attendees	p		
Transaction Date *		View Allocations	а		
02/01/2024	E				
City		Enter Vendor Name			
Seattle, Washington	× ×				
Payment Type *				1	

#### Configuration / Feature Activation

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

## Value Added Tax (VAT) / Tax Administration

#### New Country Pack with Tax Support for Malaysia

#### **Overview**

A new country pack with tax support is now available for Malaysia as a part of Concur Expense Standard Edition.

This release contains a new statutory rate bundle with pre-configured tax rates and calculations for reclaiming VAT (or Sales and Services Tax (SST), as it is known in Malaysia) paid on various employee reimbursements.

**IMPORTANT:** This solution is available for existing as well as new clients.

The pack only considers VAT on Standard Services as it is applicable to consumers and hence eligible for reimbursement and reclaim. The pack automates the creation of Tax Authority, Tax Group, Tax Conditions, Tax Rate, Reclaim Conditions, Reclaim Rate, etc. and it is non-configurable at the client's end.

The clients get pre-configured tax rates and calculations for reclaiming Sales and Services Tax (SST) paid on various employee reimbursements in compliance with the government regulations in Malaysia.

#### Configuration / Feature Activation

Contact your Regional Sales Executive at SAP Concur to get this country pack.

For general information about this functionality, refer to the <u>Concur Expense</u>: <u>Taxation Setup Guide</u>.

## **Planned Changes**

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

**NOTE:** The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the <u>Shared Changes Release Notes</u>.

## **Company Card**

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

Information First Published	Information Last Modified	Feature Target Release Date
March 2024		Late May, 2024
Any changes since the prev	ious monthly release are highlighted	in <mark>yellow</mark> in this release note.

#### Overview

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

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

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

#### Administrator Experience

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

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

Manage Card Programs	Manage Accounts	Manage Transactions	Preview M age Transactions	Manage Lodge Trans	actions Nercha	Int Code Mapping Set	tings View Import Logs	Check CR Acco	
			L4 days for a bank to post a charge						
Start Date * 😡 02/03/2024	End Date * 🕑 03/04/2024	Last 4 Dig	its of Card, Name on Card or Emp		unt (Minimum) 🥹	Amount (Maximum)		open Filters	
Release to Employee	Hide for Employee		Status	1		Last 4 Digits of Card A	ssignee Name		
	02/15/2024		Visible to Employee Assigned to a Report		1359 D08 CRTester				
	02/15/2024		Hidden for Employee Potential Dublicate		1358 D08 CRTes		08 CRTester	Tester	
٥	02/15/2024		Hidden for Employee Posted Prior to Assignment D	Jate	1358 D08 CRTester		08 CRTester		
	02/15/2024		Hidden for Employee Potential Dublicate		1358 D08 CRTester		08 CRTester		
	02/15/2024		Hidden for Employee Posted Prior to Assignment Date			1358 D	08 CRTester		
	02/15/2024		Hidden for Employee				08 CRTester		

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

Start Date * 🞯		End Date * 🚱		Last 4 Digits of Card, Name on Card or Employee I	D	Amount (Minimum) 🚱	Amount (Maximum) 🖗	>		
02/03/2024	8	03/04/2024	8	1234						
Merchant/Vendor				Status		Sub-Status				
				All	~	Potential Duplicate		×	Search	Close Filters

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



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

/lerchant/Vendor		Status All	Sub-Status Potential Duplicate	earch Close Filter
Release to Employee	Hide for Employee			
	Date @11	Status	Transaction Hidden ×	
	02/15/2024	Visible to Employee Assigned to a Report	Potential Duplicate	
0	02/15/2024	Hidden for Employee Potential Duplicate	There is already a transaction in Concur with similar attributes. Therefore, this transaction was identified by our system as a duplicate during	
	02/15/2024	Hidden for Employee Posted Prior to Assignment Date	import and hidden. Releasing this transaction will make it visible to the user for addition to an	
-	02/15/2024	Hidden for Employee	expense report. Release this transaction	

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

Date @11	Status	Last 4 Digits of Card Assignee Name
02/15/2024	Visible to Employee	
UEFEBFEUE*	Assigned to a Report	Transaction Hidden ×
02/15/2024	Hidden for Employee	Posted Prior to Assignment Date
02/15/2024	Potential Duplicate	This transaction has been hidden because it is
02/15/2024	Hidden for Employ	posted prior to card assignment date minus
02/15/2024	Posted Prior to Assignm Date	transaction release period.
0011510004	Hidden for Employee	Releasing this transaction will make it visible to
02/15/2024	Potential Duplicate	the user for addition to an expense report.
02/15/2024	Hidden for Employee	Release this transaction
02/15/2024	Posted Prior to Assignment Date	Card assignment date: 02/29/2024
02/15/2024	Hidden for Employee	Currently configured transaction release period:
02/15/2024	Posted Prior to Assignment Date	5 (days)
02/15/2024	Hidden for Employee	Modify Transaction Release Setting
02/15/2024	Potential Duplicate	Please note: Existing transactions imported prior
	Hidden for Employee	to modifying this setting will need to be
02/15/2024	Posted Prior to Assignment Date	manually released.

#### Moving Between the Two Manage Transactions Windows

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

	r in Concur. Learn More	Use Previous Experience	×
--	-------------------------	-------------------------	---

#### Configuration / Feature Activation

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

## **Receipts – ExpenseIt for Web**

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

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

#### Overview

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

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

#### **DEFAULT BEHAVIOR FOR NEW AND EXISTING USERS**

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

#### Configuration / Feature Activation

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

## Reports

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

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

#### Overview

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

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

#### PHASES

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

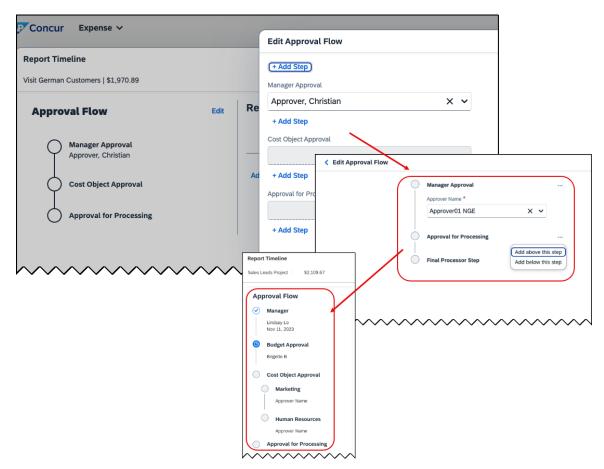
Phase	Date of Release
Phase 1: All customer test entities	April 16, 2024
Phase 2: All production entities	April 23, 2024

#### End-User Experience

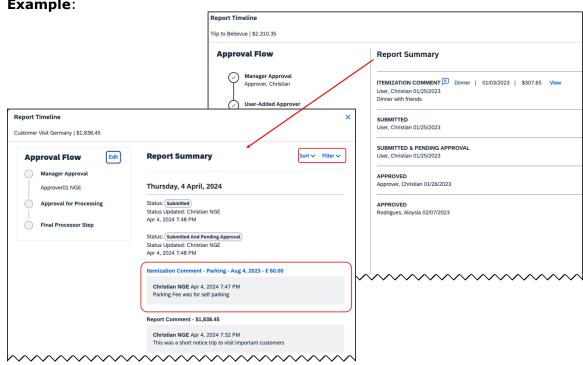
Open an expense report and click **Report Details > Report Timeline** to see the new enhancements in the **Report Timeline** screen. You will see more information than was previously available, along with the status of the report and names of the approvers.

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

#### Example:



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



#### Example:

#### Configuration / Feature Activation

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

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

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

#### **Overview**

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

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

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

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

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

#### End-User Experience

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

#### Configuration / Feature Activation

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

## **User Interface Changes**

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

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

#### Overview

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

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

#### End-User Experience

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

#### Configuration / Feature Activation

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

## Accessibility

## Accessibility Updates

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

## **Gender Diversity**

## **Gender Diversity Planned Features and Changes**

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

These planned changes reflect <u>SAP's commitment to supporting gender diversity</u> and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the <u>SAP</u> <u>Concur release notes</u>.

## **In-Product User Assistance**

## **Client Customized Content**

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

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

## Subprocessors

#### SAP Concur Non-Affiliated Subprocessors

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

- To access the SAP Concur Sub-processors List:
  - Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page: <u>SAP Sub-processors / Data Transfer Factsheets</u>
  - 2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

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

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

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

## **Supported Browsers**

## Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the <u>Concur Travel & Expense Supported Configurations</u> guide.

When changes to browser support are planned, information about those changes will also appear in the <u>Shared Changes Release Notes</u>.

# Additional Release Notes and Other Technical Documentation

## **Online Help**

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

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the <u>SAP Concur solutions page</u>.

SAP	Help Portal (Documentation)		,≡,
	ONCUP English (United States of America)  utions help businesses manage employee travel booking and expense rep	vorting.	
This product ▼	Search in all documents related to this product	Q ✓ Advanced Search	
			🛧 Favorite 🛭 😪 Share

## **SAP Concur Support Portal – Selected Users**

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

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



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

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

## Cases

## **Check Support Case Status**

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

- To check the status of a submitted case:
  - 1. Log on to <a href="https://concursolutions.com/portal.asp">https://concursolutions.com/portal.asp</a>.
  - 2. Click **Help > Contact Support**.

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

- 3. Click **Support > View Cases**.
- 4. In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

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