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

Contents

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Release Notes

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

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

Expense

Expense Payment Confirmation Import Now Supports Report Number

Overview

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

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

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

BUSINESS PURPOSE

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

Administrator Experience

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

Configuration / Feature Activation

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

Expense Pay

Additional Card Program Now Supported for Europe

Overview

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

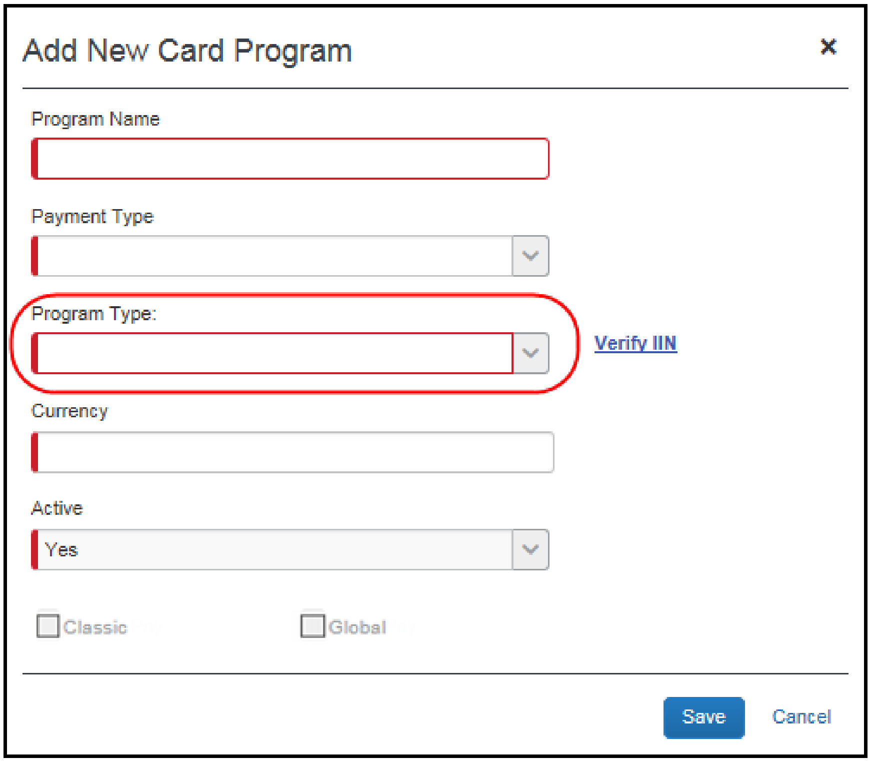
- HSBC – VISA – GBP – HBEU
- HSBC – MasterCard – EURO – HBEU
- HSBC – MasterCard – GBP – HBCE
- HSBC – MasterCard – EURO – HBCE

BUSINESS PURPOSE / CLIENT BENEFIT

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

Administrator Experience

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



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

Configuration / Feature Activation

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

Receipts – ExpenseIt for Web

ExpenseIt for Concursolutions.com

Overview

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

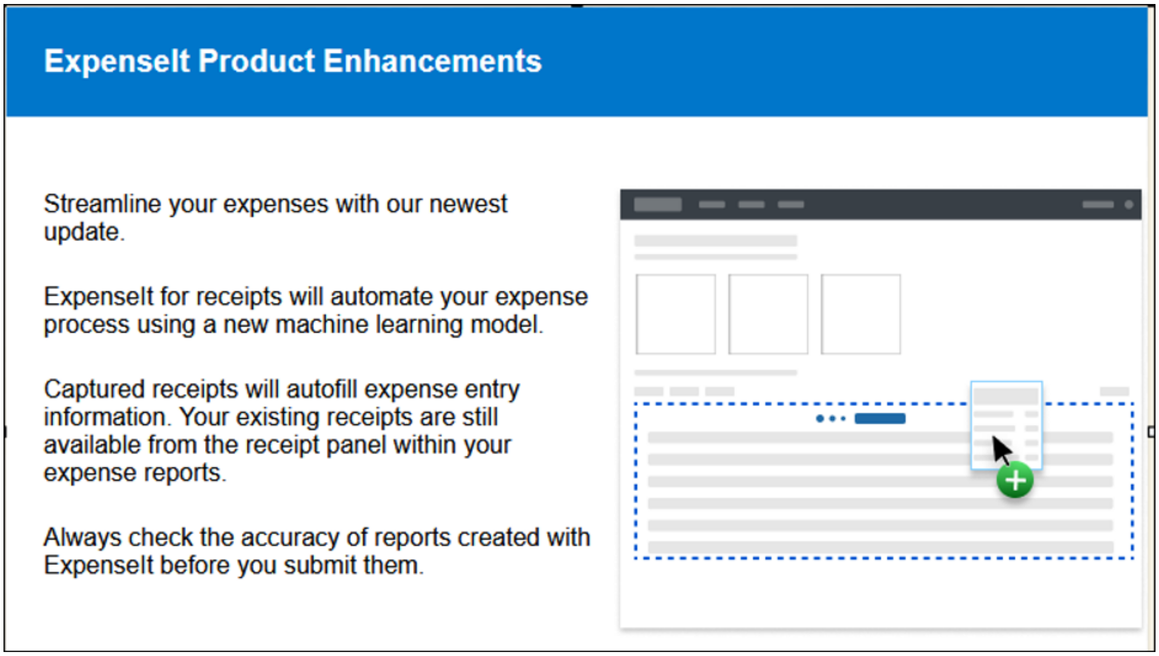
This reduces data entry effort for the end-user and provides the company with expanded awareness and benefit from ExpenseIt.

Release Schedule

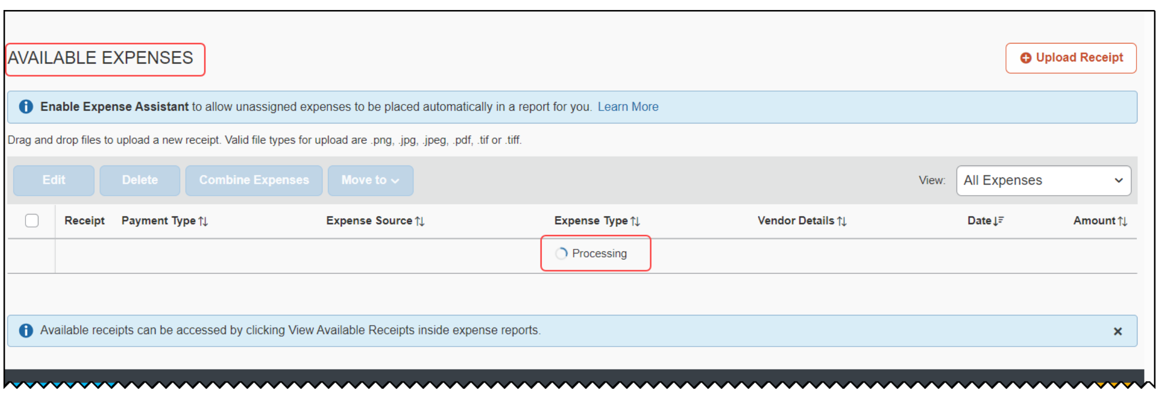
ExpenseIt for Web is released to all customers the week of January 15, 2024. Individual customers were activated over the course of this week, so not all customers were enabled on the same day.

End-User Experience

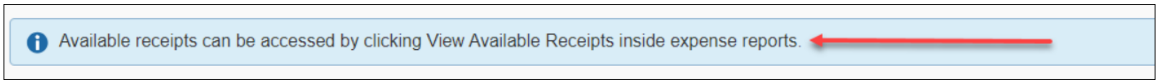
This feature will alert the ExpenseIt end-user that new functionality is available by displaying the **ExpenseIt Product Enhancements** informational window when the end-user first logs in.



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



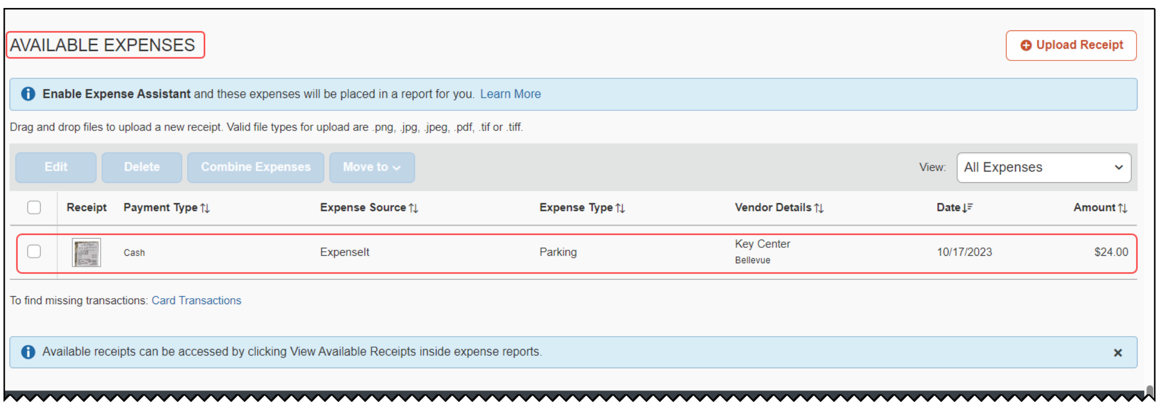
End-users can drag-n-drop receipts or use the **Upload Receipt** button to add one or more receipts at the same time, all processed by ExpenseIt. A blue bar appears under the expense table with information explaining the user interface – after review, dismiss by clicking the X to the right.



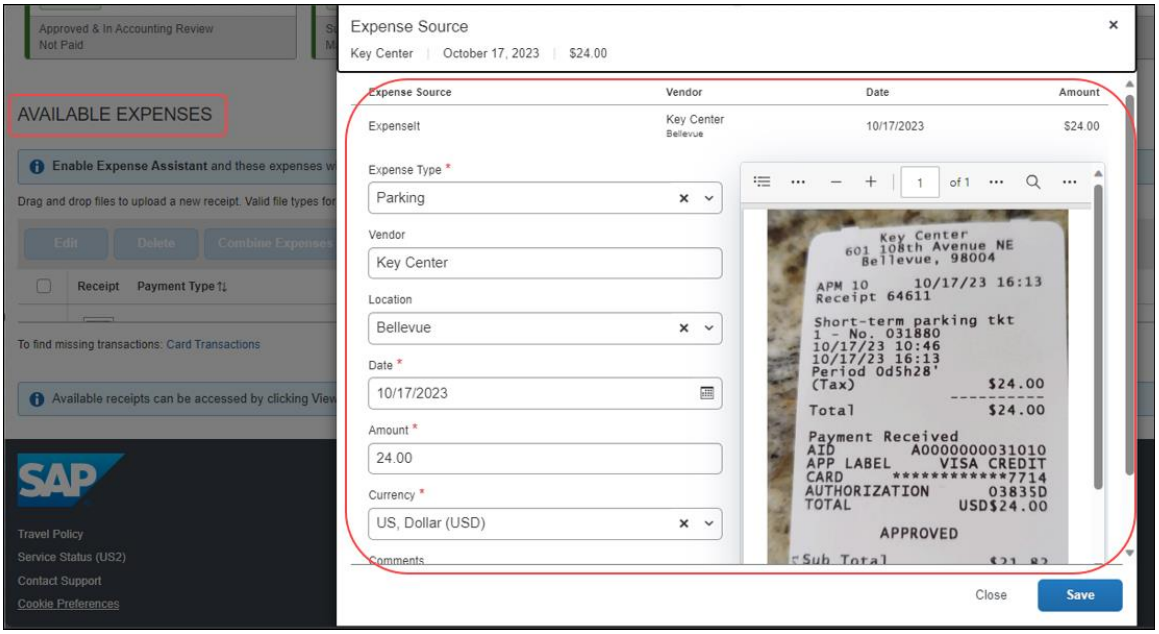
NOTE: Receipts uploaded via the web UI or emailed may not be eligible for digital certification per the country-specific regulatory requirements that apply for that user. These users should continue to use the same processes they employed prior to this feature to achieve a certified receipt image.

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**	



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.



ADDITIONAL CHANGES TO THE USER INTERFACE

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

HANDLING OF NON-RECEIPT DOCUMENTS FOR THE EXPENSE REPORT

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

IMPORTANT: THE VERIFICATION STEP

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

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

Document Certification/Tax Compliance

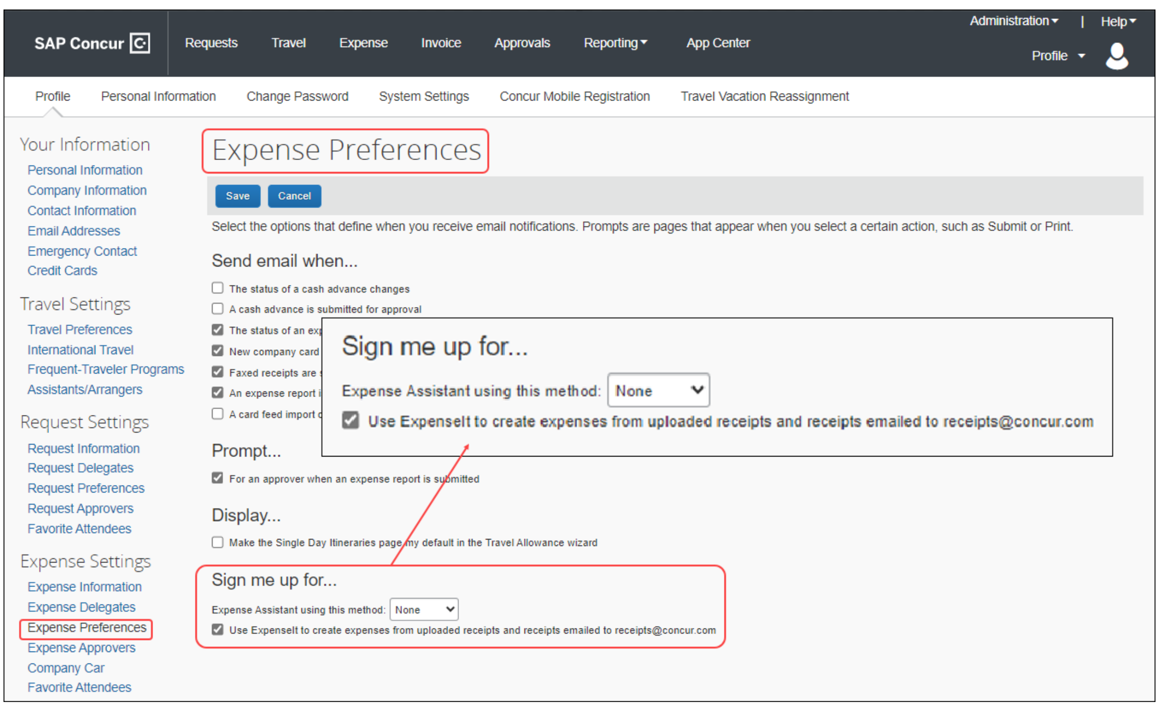
Options for providing tax compliant receipt documents are dictated by the country-specific regulatory rules, and users must continue to follow the same processes used prior to this change.

- **Receipt Digitalization:** Images uploaded on 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 end-user interface and functionality described in this release note by clearing the **Use ExpenseIt to create expenses from uploaded receipts and receipts emailed to** receipts@concur.com on **Profile Settings** > **Expense Preferences**.

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



Configuration / Feature Activation

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

Verify

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

Overview

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

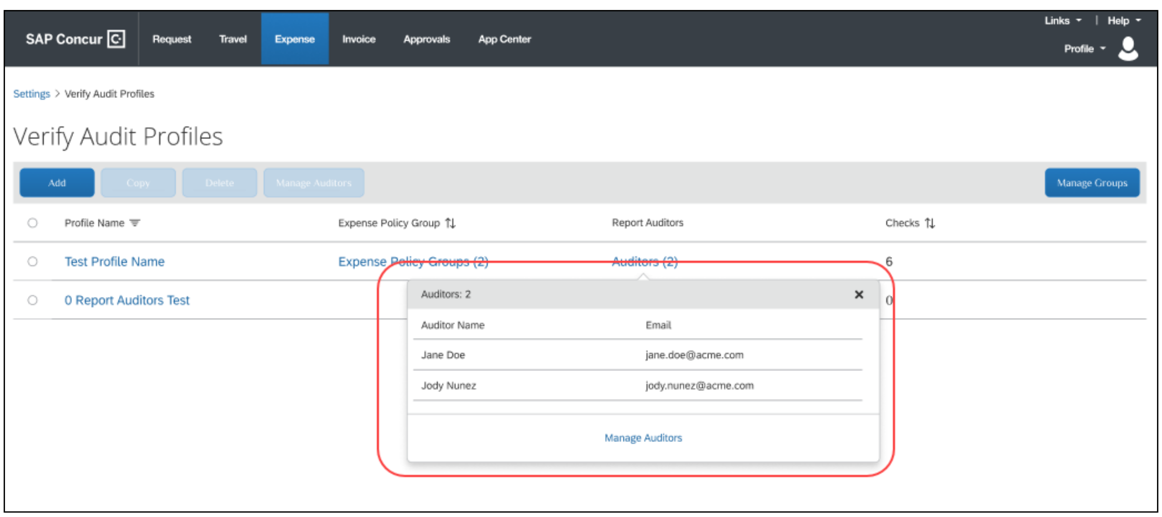
BUSINESS PURPOSE / CLIENT BENEFIT

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

Administrator Experience

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

Example



Configuration / Feature Activation

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

Planned Changes

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

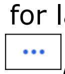
NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Miscellaneous

Planned Changes New Action Column Available in Expense Screens

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

Overview

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

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

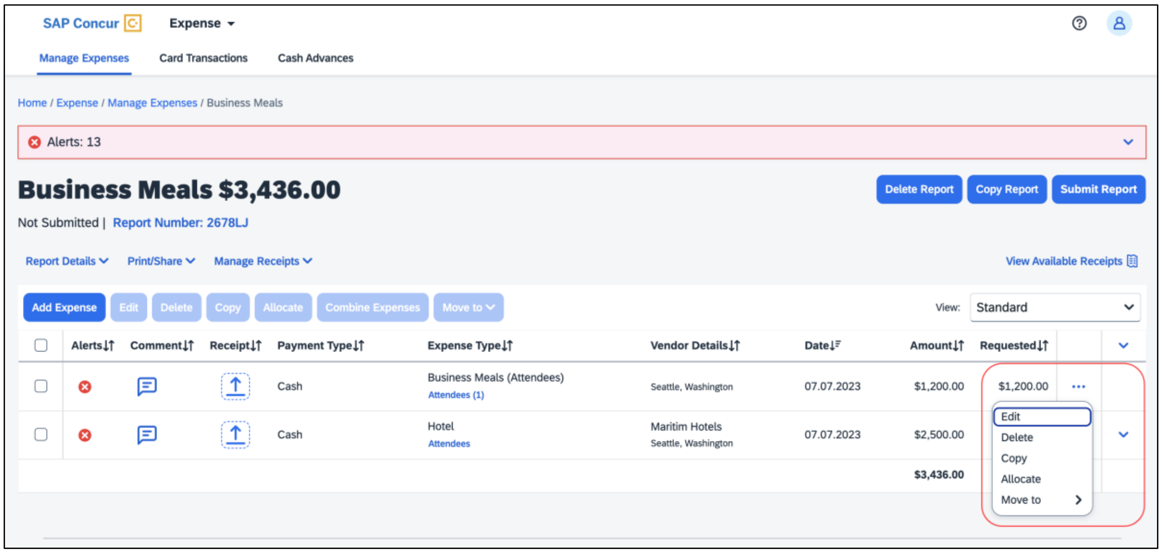
BUSINESS PURPOSE / CLIENT BENEFIT

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

End-User Experience

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

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

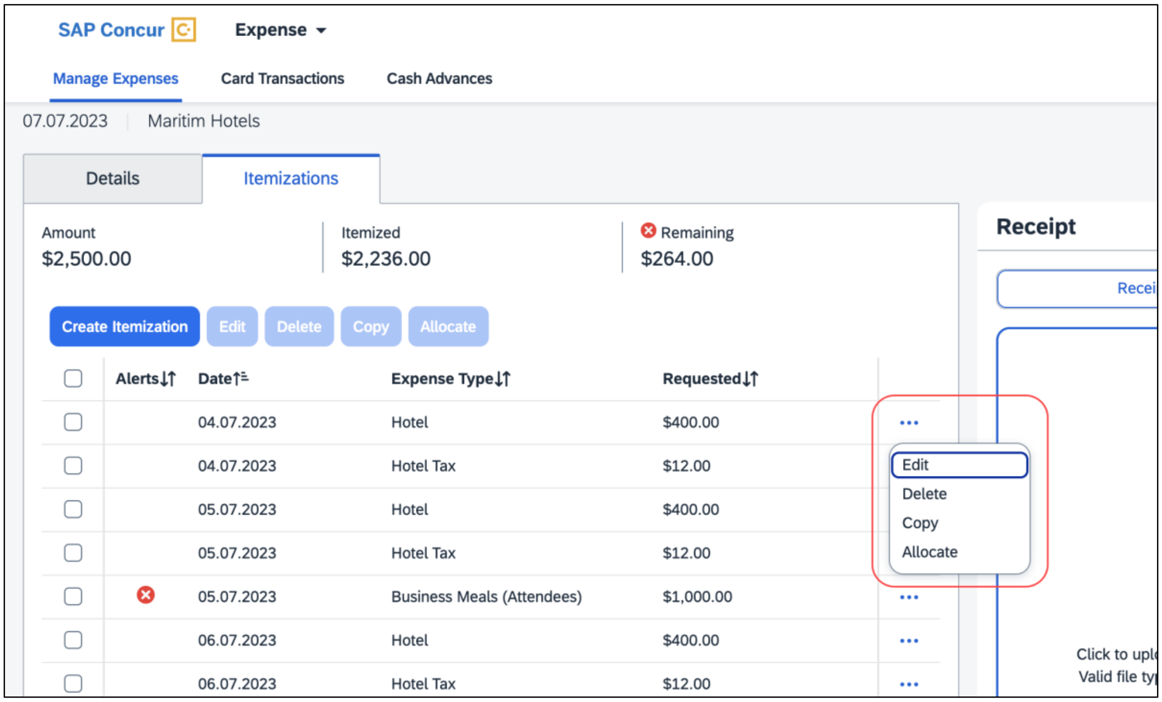


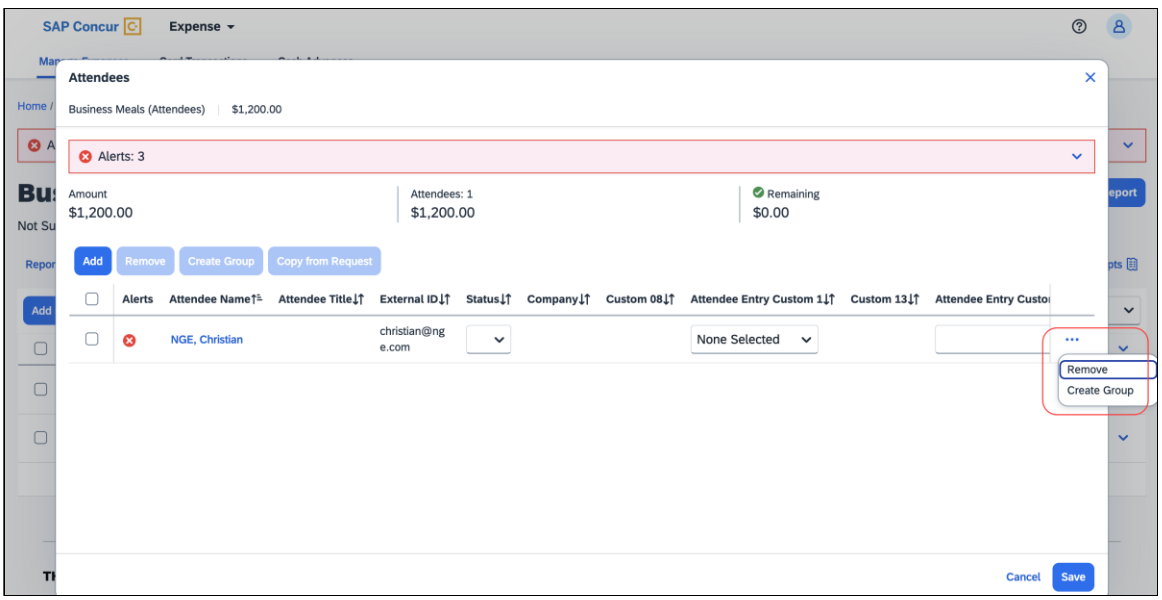
The updated Expense screens and their actions are:

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

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

For Example





Configuration / Feature Activation

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

User Interface Changes

Planned Changes Update to the Report Status Indicator

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

Overview

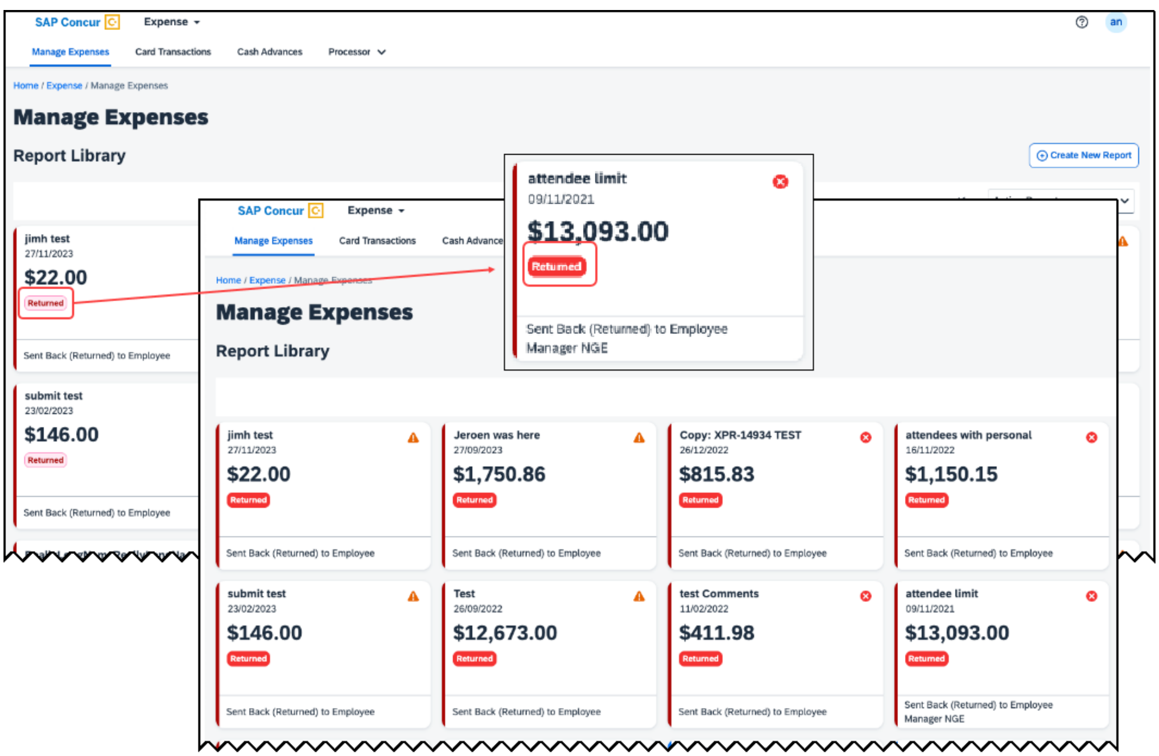
In an upcoming release, the rectangular indicator that shows the status of an expense report will be changed. With the change, this indicator will be more prominent and easier to read than the prior version.

BUSINESS PURPOSE / CLIENT BENEFIT

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

End-User Experience

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



Configuration / Feature Activation

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

Client Notifications

Accessibility

Accessibility Updates

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

Gender Diversity

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

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

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

In-Product User Assistance

Client Customized Content

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

To access the SAP Concur Sub-processors List:

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
   SAP Sub-processors / Data Transfer Factsheets

2. Sign into the SAP Support Portal using your Support User ID (S-user) and password.

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

3. On the *SAP Sub-processors / Data Transfer Factsheets* page, type "Concur" in the **Search** field.

4. In the **Title** column, click **SAP Concur Sub-processors List**.

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

Supported Browsers

Supported Browsers and Changes to Support

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

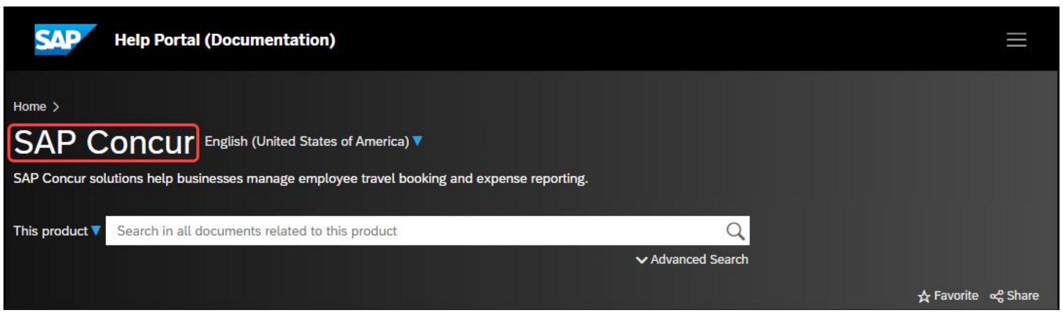
When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes*.

Additional Release Notes and Other Technical Documentation

Online Help

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

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



SAP Concur Support Portal – Selected Users

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

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

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

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

Cases

Check Support Case Status

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

To check the status of a submitted case

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

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

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

SAP Concur Release Notes **Concur Expense Professional / Premium**	
Month	**Audience**
Release Date: February 24, 2024 Initial Post: February 23, 2024	Client ***FINAL***

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Cards

Retirement of Batch File Option for Unsupported Card Programs

Overview

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

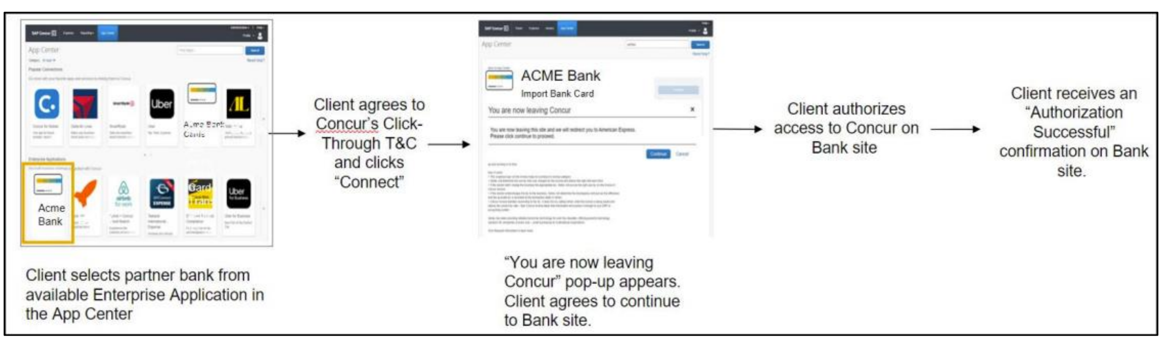
NOTE: This action does not mean a retirement of the Batch File method for card issuers already integrated using the batch file option.

BUSINESS PURPOSE / CLIENT BENEFIT

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

THE PAYMENT CARD INTEGRATION SERVICE

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



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

Administrator Experience

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

Configuration / Feature Activation

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

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

Yodlee Reauthentication Refresh Frequency

Overview

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

BUSINESS PURPOSE

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

End-User Experience

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

Administrator Experience

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

Configuration / Feature Activation

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

Expense Types

Recovering And Displaying Deactivated Expense Types

Overview

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

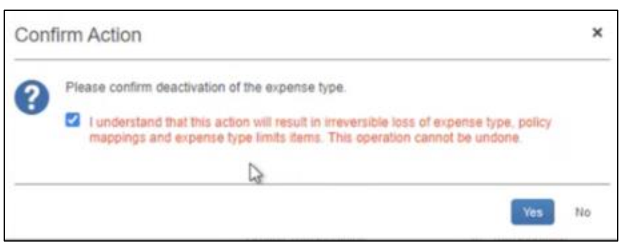
The expense types listing is sorted based on their active status. Much like active expense types, inactive expense types can be modified and can be set to active, or even be reactivated with a different name.

BUSINESS PURPOSE

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

Administrator Experience

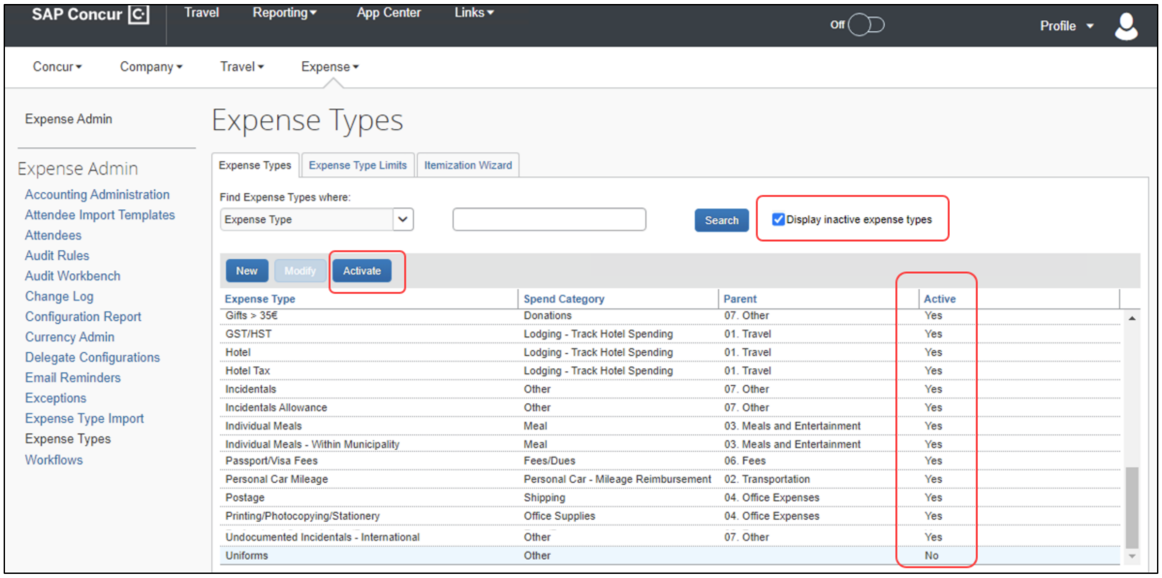
In the **Expense Admin > Expense Types** screen, the **Remove** button is now replaced with the **Activate** or **Deactivate** button (based on the activation context of the expense type). To activate or deactivate an expense type, select the expense type, and click **Activate** or **Deactivate**. A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



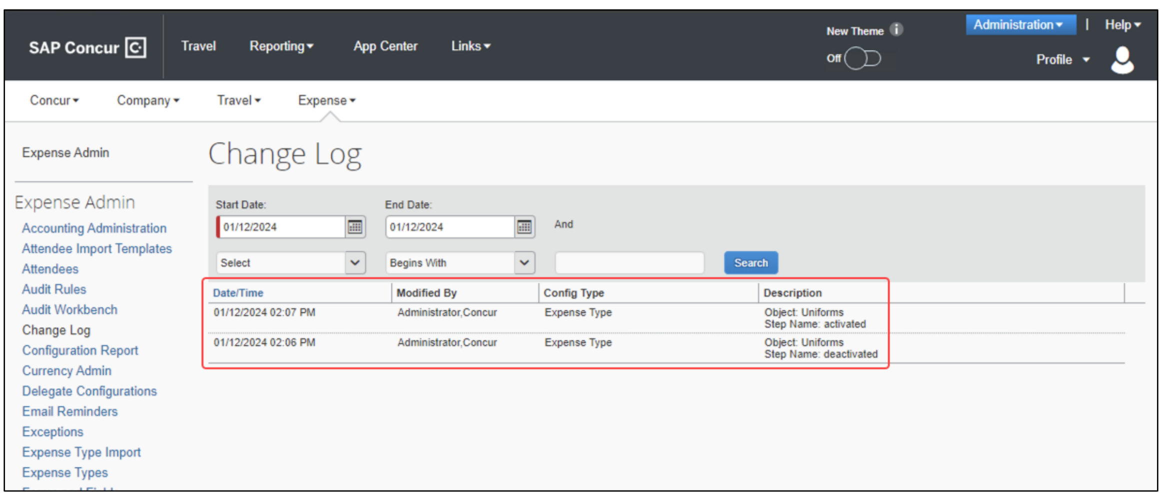
Click **Yes** to proceed.

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

Filter expense types listing to display only active expense types or select the **Display inactive expense types** checkbox to view all expense types. A new column **Active** displays the status of the expense types available using **Yes** (Active) and **No** (Inactive) indicators.



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



Configuration / Feature Activation

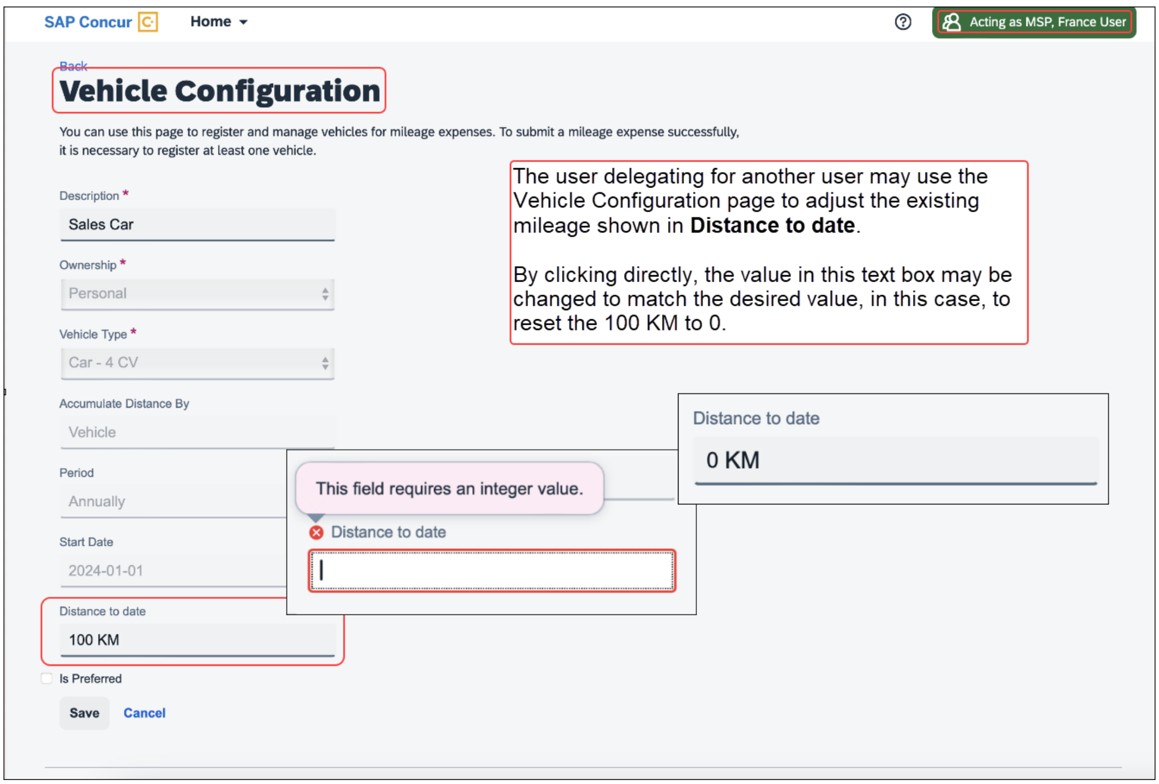
The change occurs automatically; there are no additional configuration steps.

Mileage Service

Delegate Administrator May Reset Initial Distance Mileage for Personal Car

Overview

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



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

Business Purpose / Client Benefit

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

Administrator Experience

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

Configuration / Feature Activation

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

Miscellaneous

Enhancing Additional Fields with Most Recently Used (MRU) Feature

Overview

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

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

BUSINESS PURPOSE

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

Administrator Experience

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

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

Configuration / Feature Activation

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

New Action Column Available in Expense Screens

Overview

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

None of the existing functionalities are removed with this release:

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

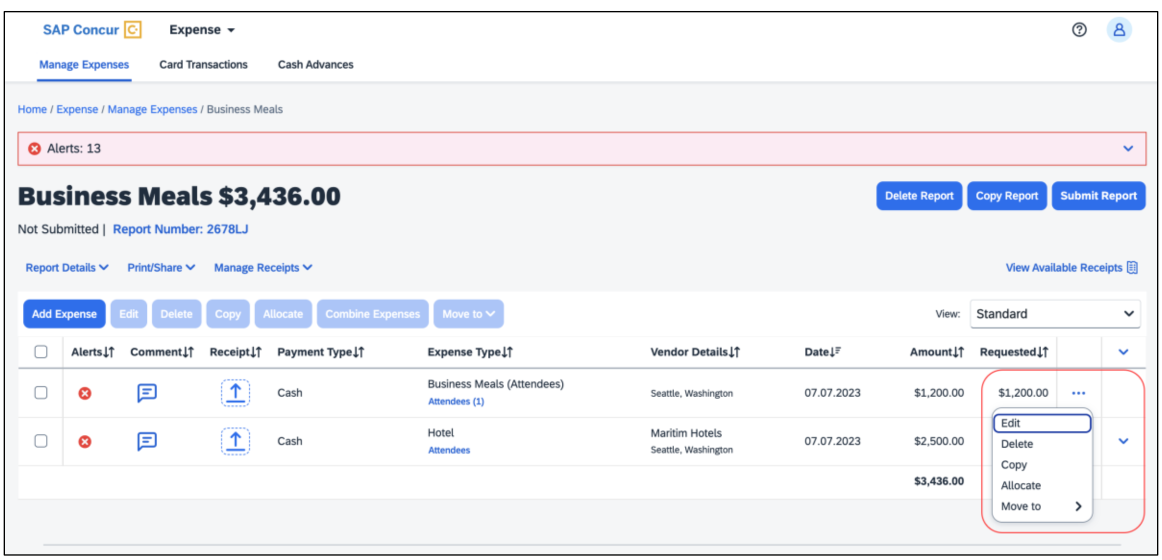
BUSINESS PURPOSE / CLIENT BENEFIT

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

End-User Experience

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

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



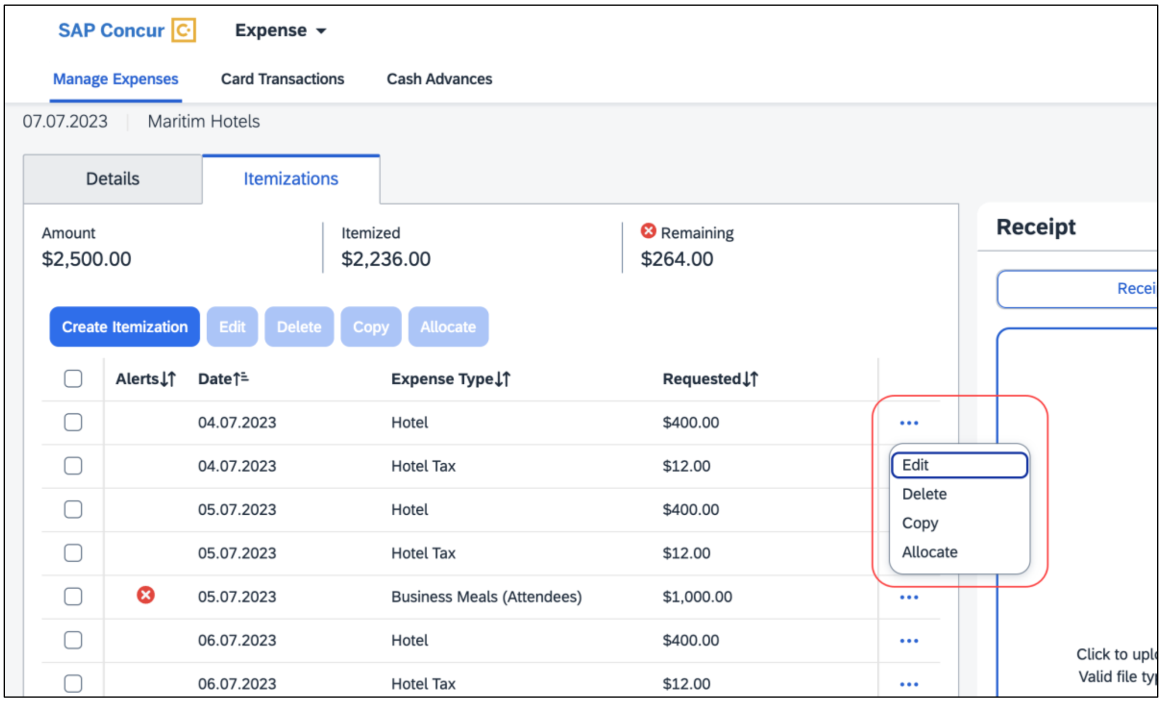
The updated Expense screens and their actions are:

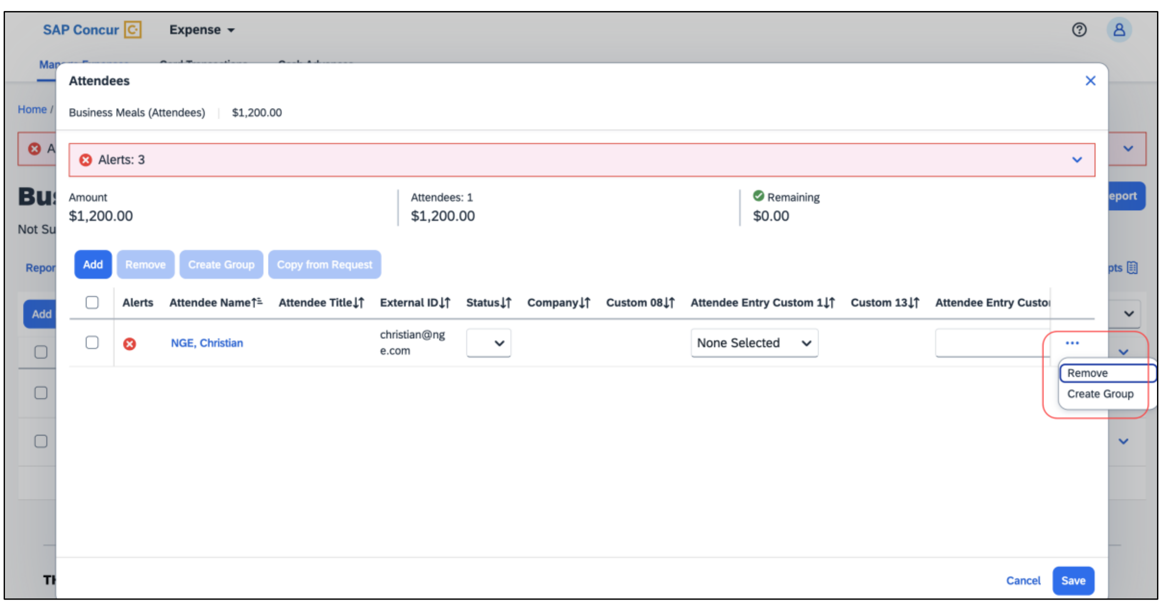
- Reports list
    - View

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

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

FOR EXAMPLE





Configuration / Feature Activation

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

Update to the Report Status Indicator

Overview

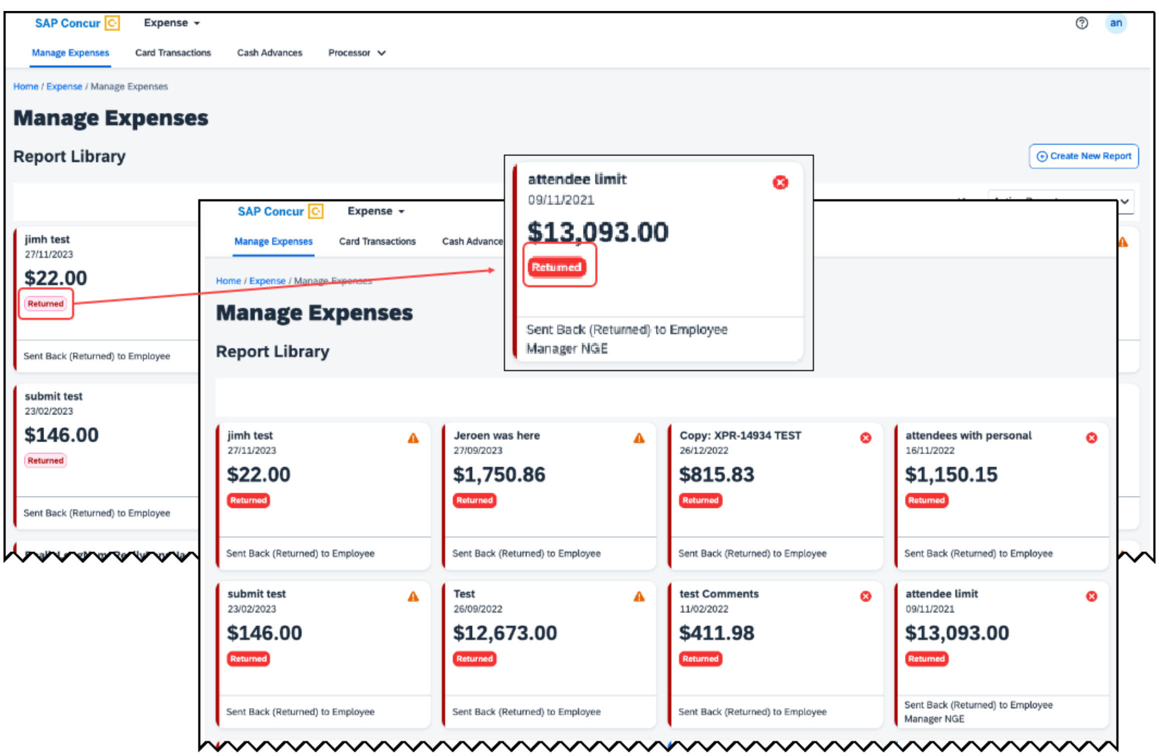
The rectangular indicator that shows the status of an expense report is now updated. With the change, this indicator is more prominent and easier to read than the prior version.

BUSINESS PURPOSE / CLIENT BENEFIT

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

End-User Experience

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



Configuration / Feature Activation

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

Planned Changes

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

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

Cash Advance

Planned Changes FIS / ICS Client Cash Advance Improvements

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

Overview

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

End-User Experience

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

Administrator Experience

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

Configuration / Feature Activation

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

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

Client Notifications

Accessibility

Accessibility Updates

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

Gender Diversity

Gender Diversity Planned Features and Changes

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

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

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

In-Product User Assistance

Client Customized Content

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

To access the SAP Concur Sub-processors List:

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

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

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

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

Supported Browsers

Supported Browsers and Changes to Support

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

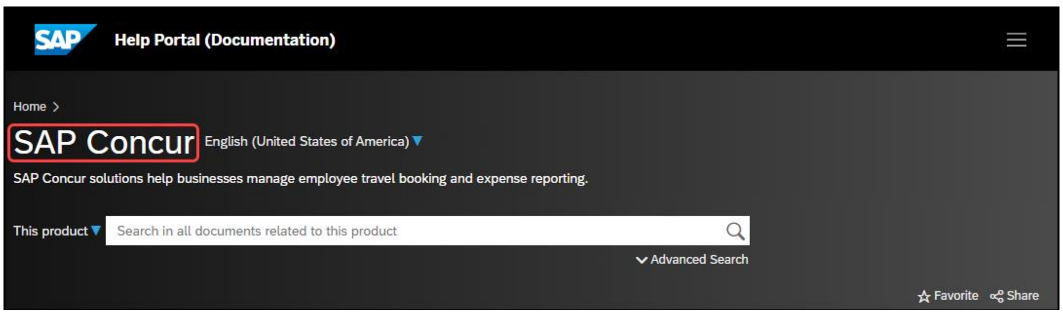
When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes*.

Additional Release Notes and Other Technical Documentation

Online Help

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

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



SAP Concur Support Portal – Selected Users

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

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

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

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

Cases

Check Support Case Status

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

To check the status of a submitted case

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

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

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

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

Contents

Legal Disclaimer

Release Notes

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

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

Audit Rules

Check for Expense Date Within Leave of Absence Date Range

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Administrator Sees

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

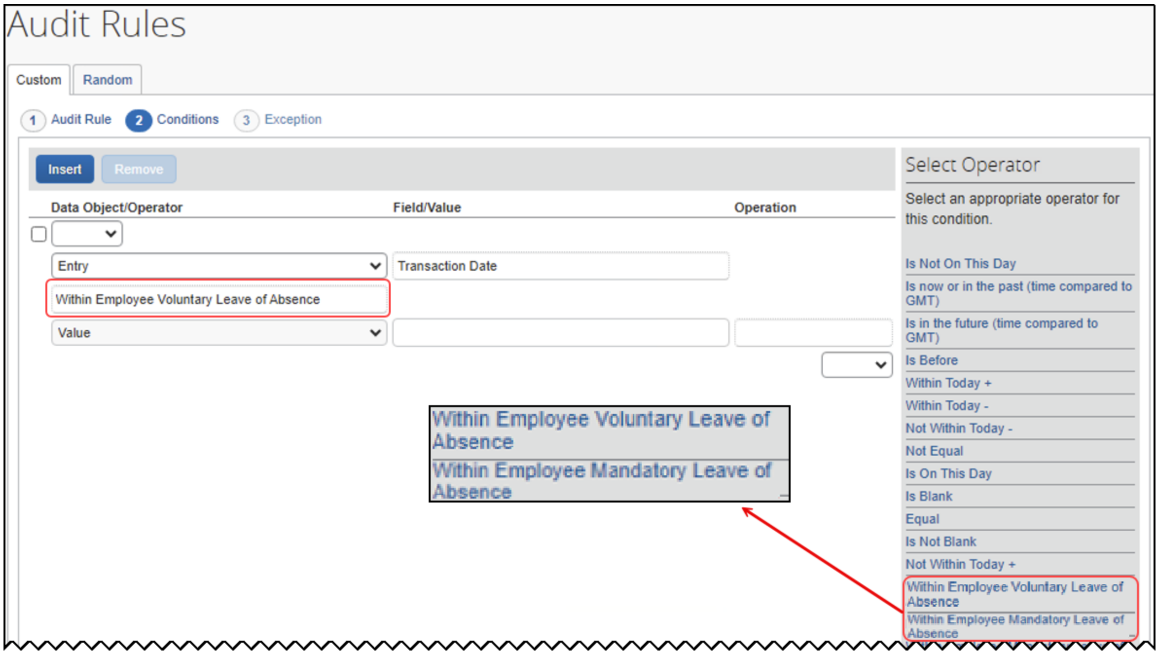
TYPES OF LOA

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

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

How the Date Ranges are Handled

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



Note the following when using this feature:

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

Configuration / Feature Activation

Companies wishing to use this new option must:

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

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

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

Expense Pay

Additional AMEX Corporate Card Programs Now Supported for Europe

Overview

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

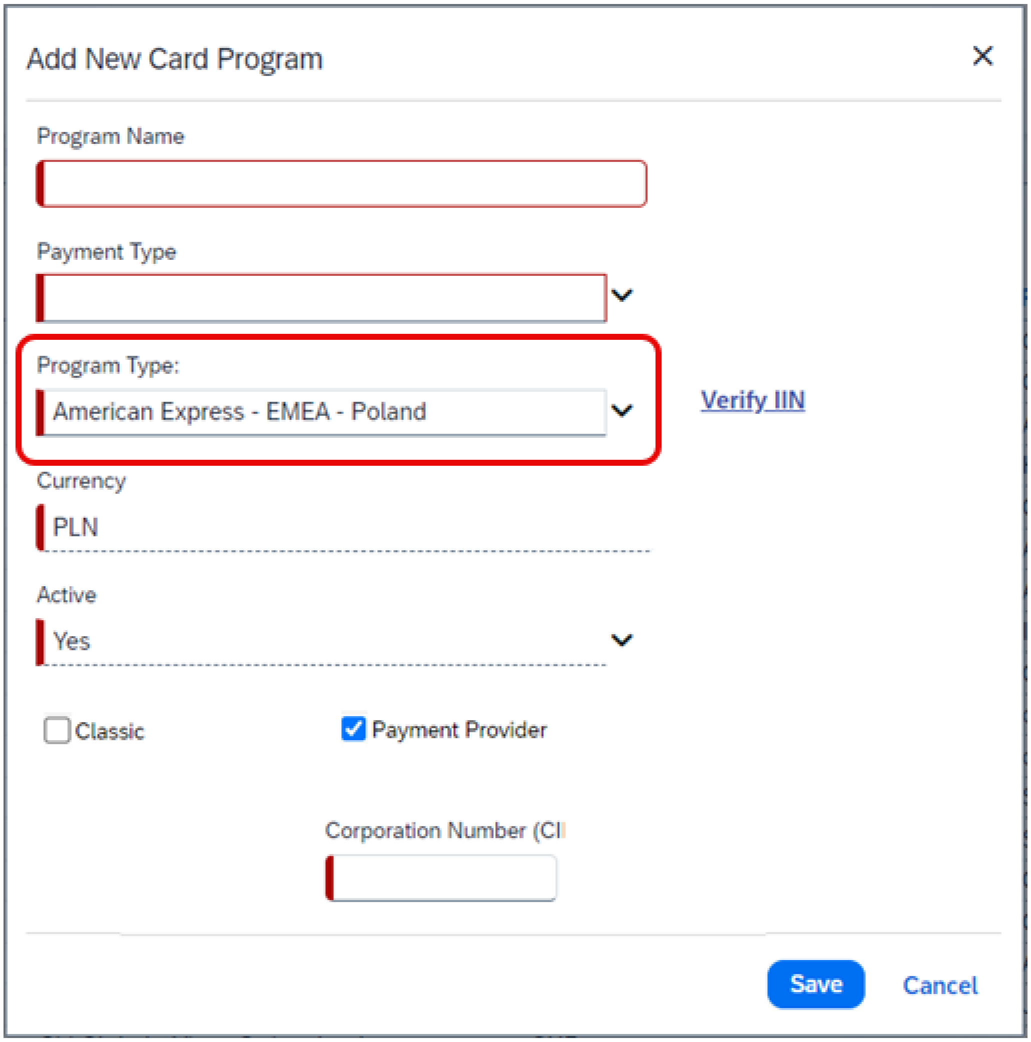
- American Express – EMEA – Czechia (CZK)
- American Express – EMEA – Norway (NOK)
- American Express – EMEA – Poland (PLN)

BUSINESS PURPOSE / CLIENT BENEFIT

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

Administrator Experience

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



End-User Experience

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

Configuration / Feature Activation

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

Verify

Audit Profile: Quick Start Profiles

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

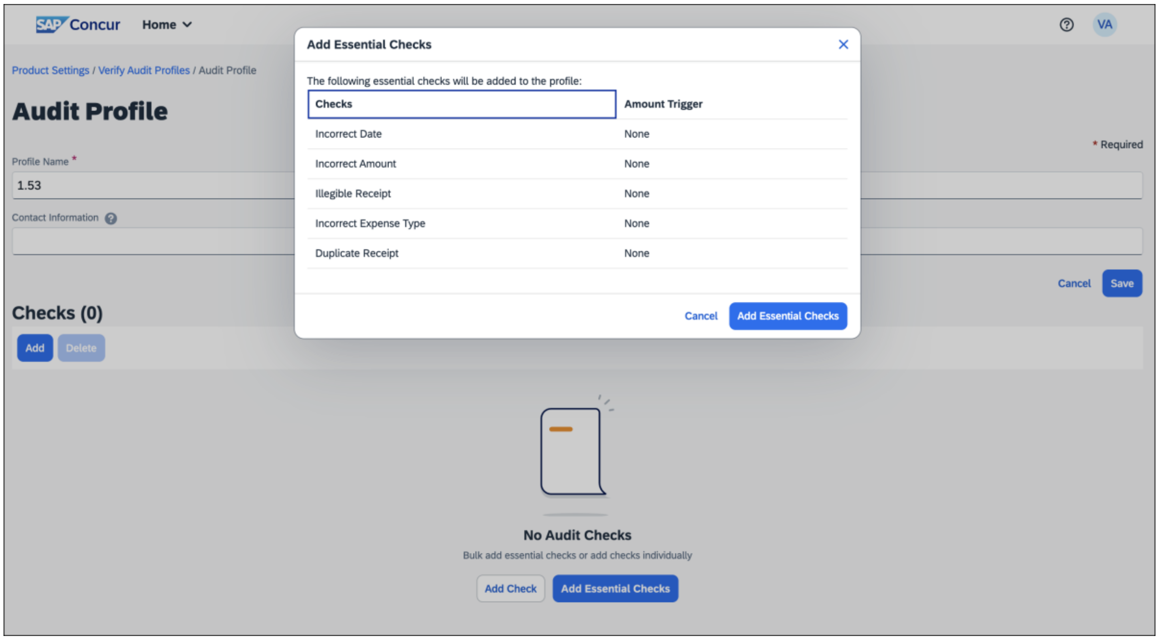
Administrator Experience

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

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

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

Example



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

Configuration / Feature Activation

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

Traveler Name Check Update

Overview

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Administrator Experience

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

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

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

Configuration / Feature Activation

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

Planned Changes

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

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

Company Card

Planned Changes Enhancements to the Manage Transactions Screen

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

Overview

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

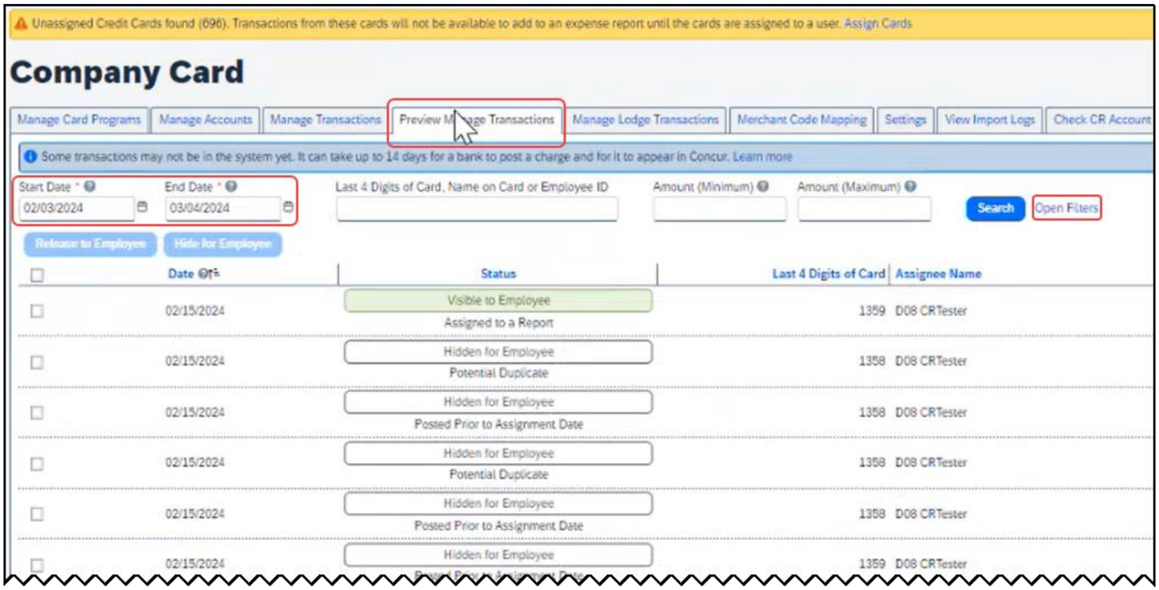
NOTE: More feature information will be available in an upcoming release note.

BUSINESS PURPOSE / CLIENT BENEFIT

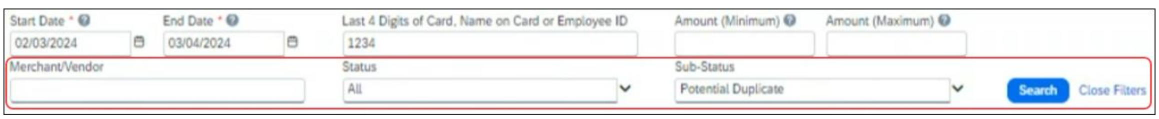
This feature improves the company card experience by automatically displaying search results from the previous 30 days with the ability to perform a more complex search that displays hidden, visible, duplicate, and expensed transactions in a column order view familiar to administrators working in a financial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

Administrator Experience

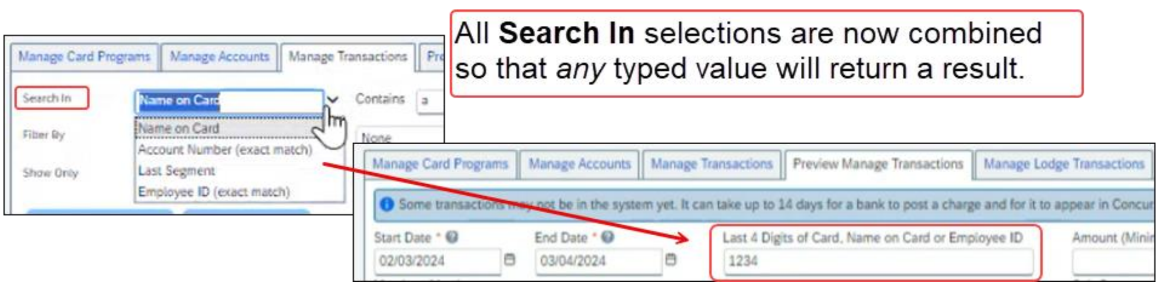
The Company Card administrator will see the simple search format of employee transactions of the previous 30 days. Transactions that are both hidden and visible to employees (including transactions that are already on an expense report) will be returned.



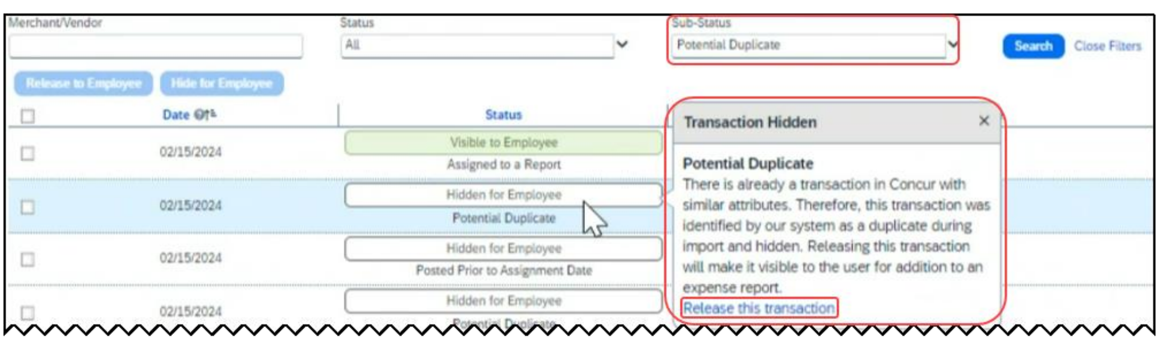
From this simple format, the administrator clicks **Open Filters** to refine the search:



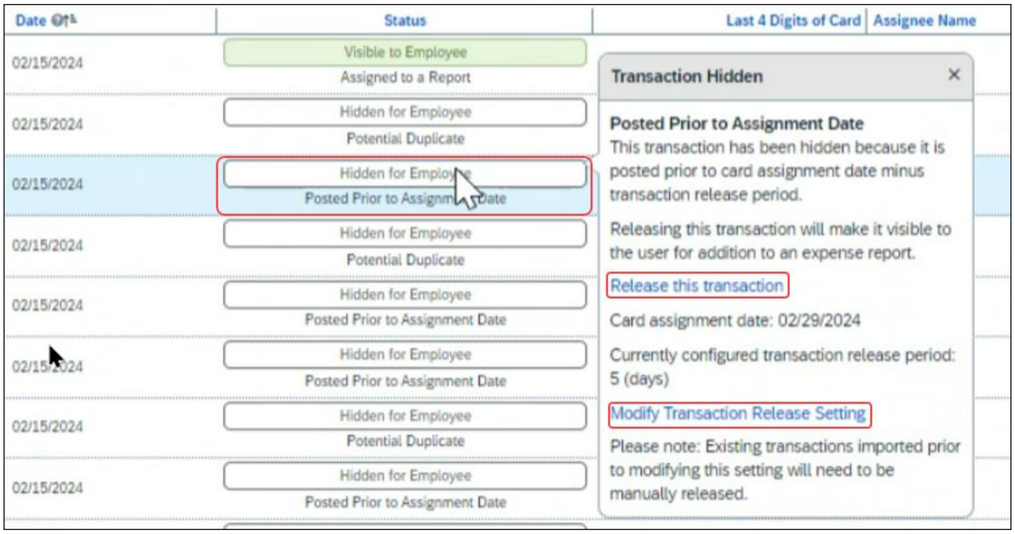
The **Last 4 Digits…** search now combines the logic for *all* the potential typed values:



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



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



Moving Between the Two Manage Transactions Windows

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

Configuration / Feature Activation

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

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

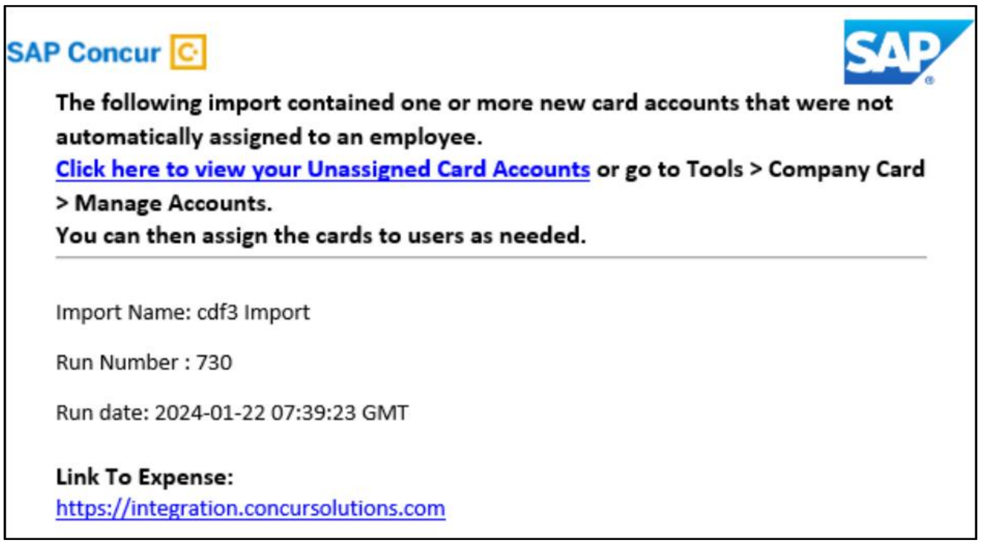
On April 4th, the email notifying the client of unassigned card accounts that require assignment will be changed. At that time, the text will be modified and a link to assign the accounts will be provided directly in the body of the email.

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.


SAP Concur

The following import contained one or more new card accounts that were not automatically assigned to an employee.
Click here to view your Unassigned Card Accounts or go to Tools > Company Card > Manage Accounts.
You can then assign the cards to users as needed.

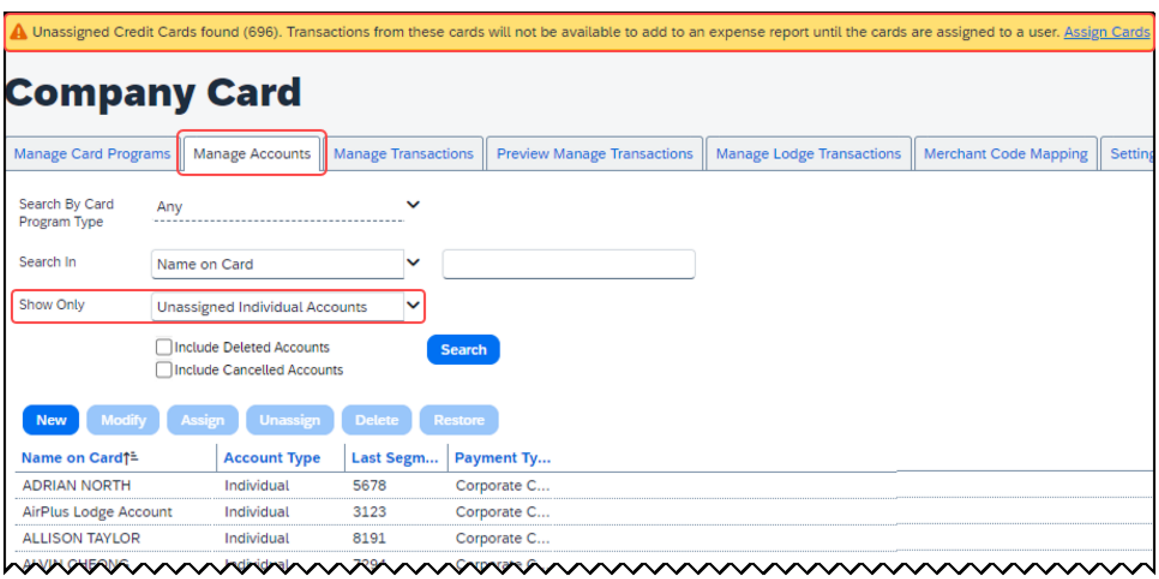
Import Name: cdf3 Import

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.



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

Configuration / Feature Activation

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

Expense Pay

Planned Changes Enhanced User Interface in Payment Manager

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

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Administrator Experience

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

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

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

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

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

Configuration / Feature Activation

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

Localization

Planned Changes Removal of Expense Types Descriptions

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

Overview

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

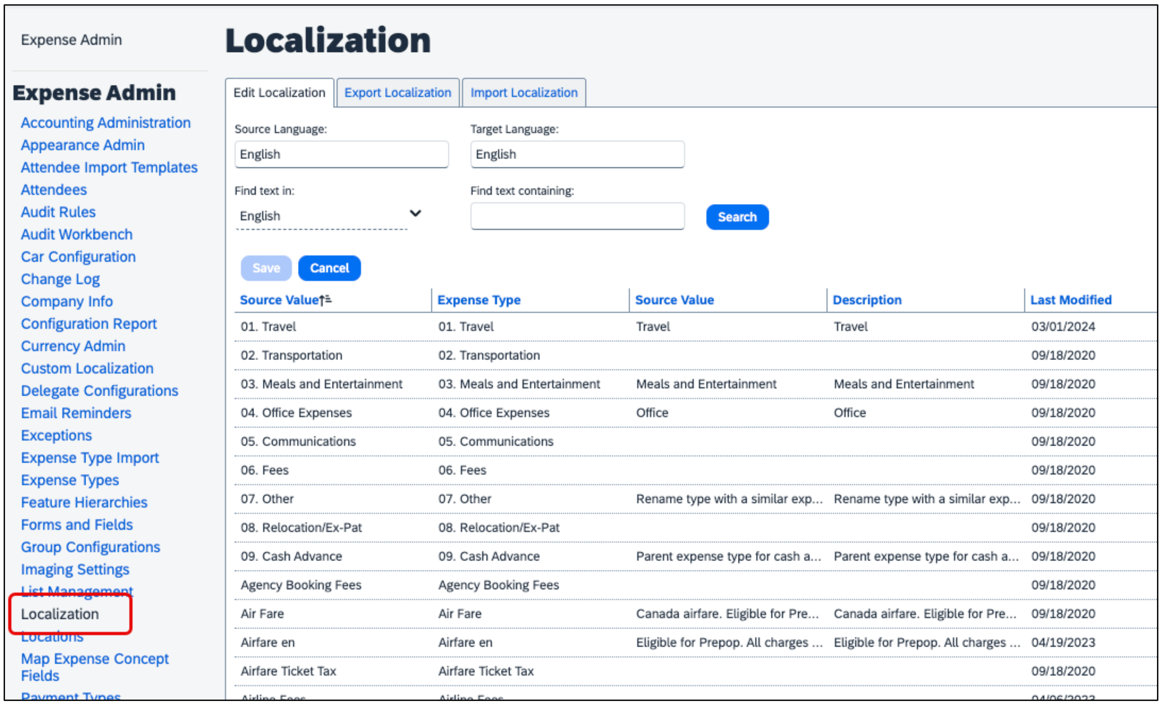
However, the localized text is not used within SAP Concur.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Administrator Experience

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



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

Configuration / Feature Activation

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

Miscellaneous

Planned Changes Keyboard Shortcuts for Expense Screens

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

Overview

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

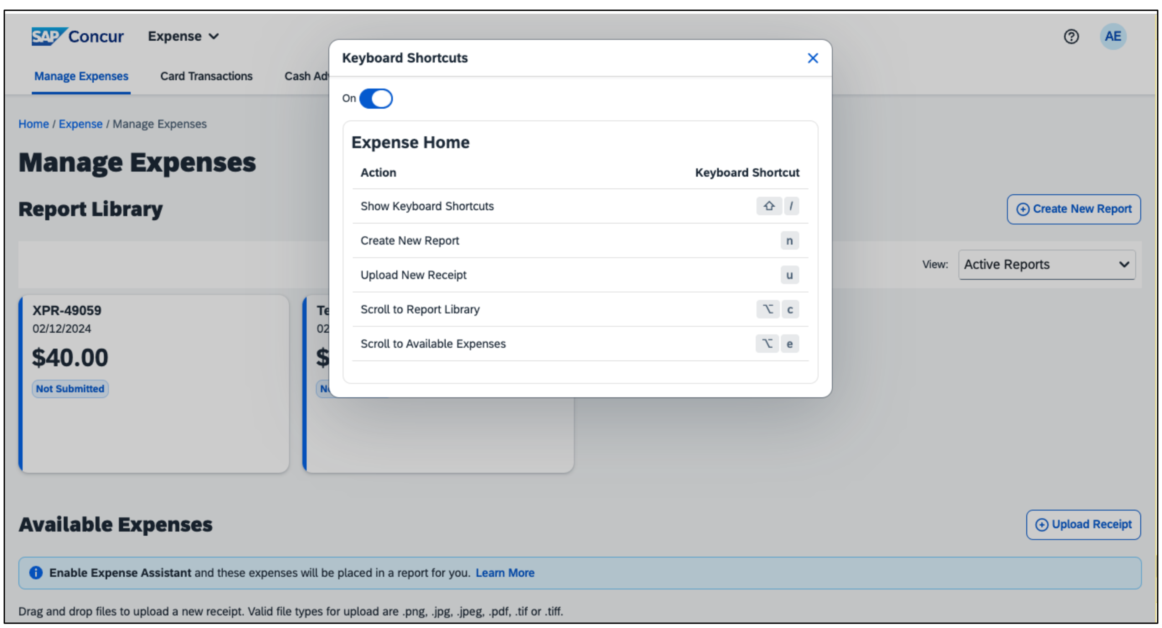
NOTE: This feature will currently be available in English only.

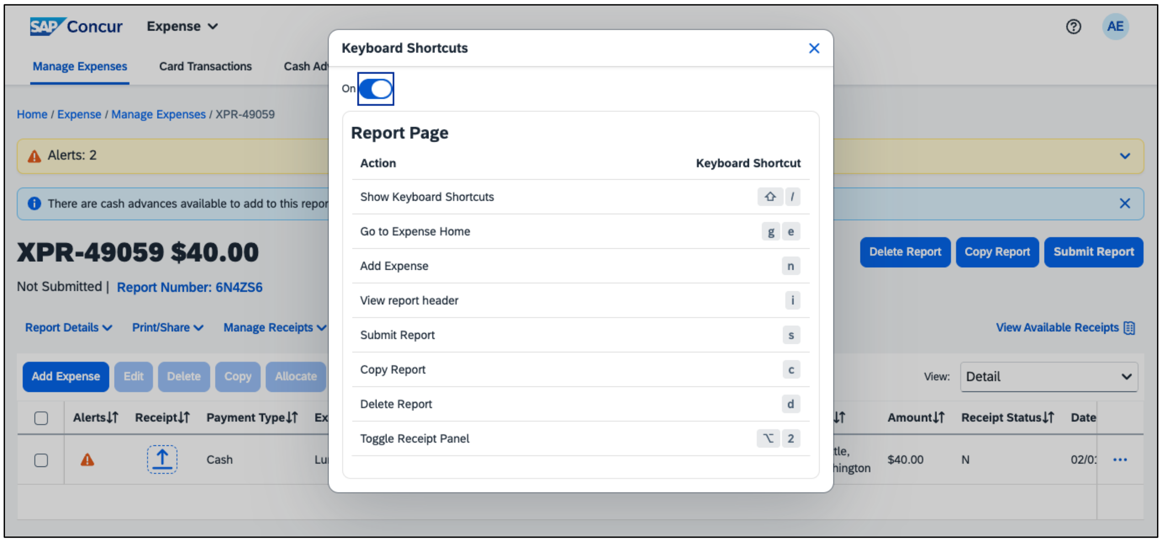
Business Purpose / Client Benefit

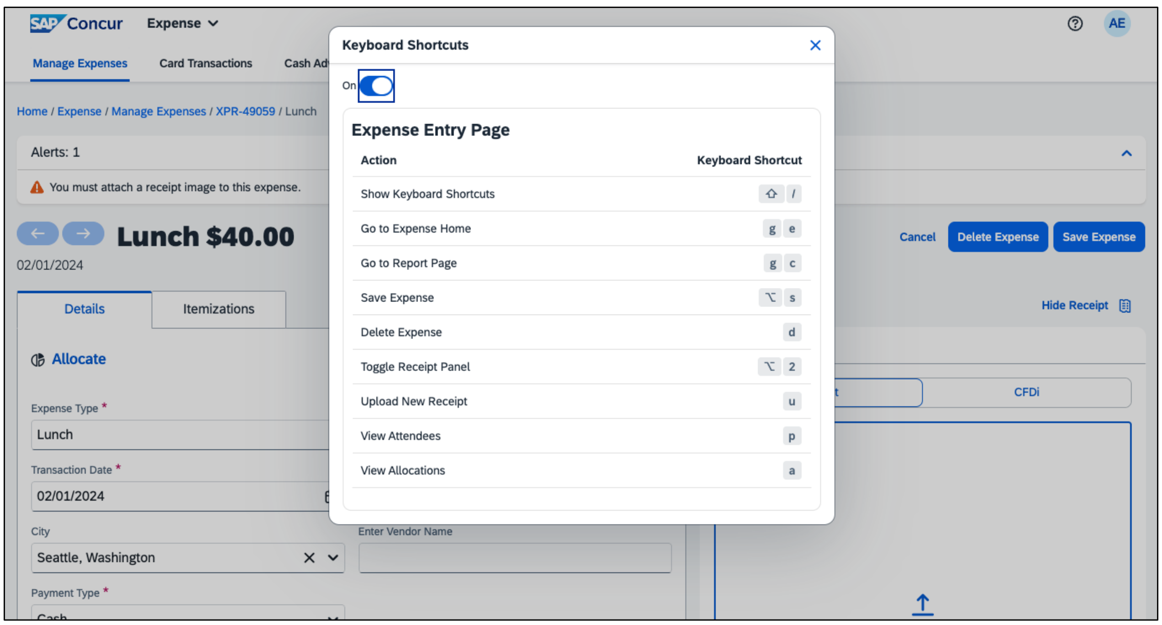
This update will offer users a more convenient way to navigate the expense application faster, ultimately improving productivity, efficiency, and user satisfaction.

End-User Experience

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







Configuration / Feature Activation

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

Reports

Planned Changes Preferred Name for Expense Submitter

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

Overview

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

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

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

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

BENEFIT

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

End-User Experience

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

Configuration / Feature Activation

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

Client Notifications

Accessibility

Accessibility Updates

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

Gender Diversity

Gender Diversity Planned Features and Changes

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

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

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

In-Product User Assistance

Client Customized Content

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

To access the SAP Concur Sub-processors List:

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

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

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

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

Supported Browsers

Supported Browsers and Changes to Support

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

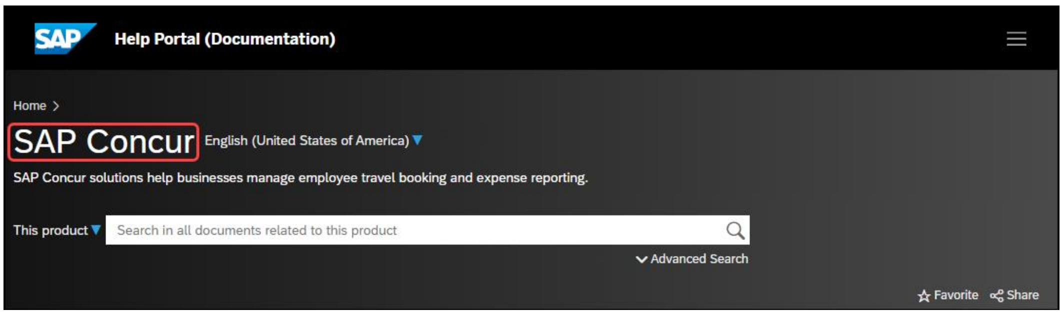
When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes*.

Additional Release Notes and Other Technical Documentation

Online Help

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

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



SAP Concur Support Portal – Selected Users

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

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

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

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

Cases

Check Support Case Status

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

To check the status of a submitted case

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

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

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

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

Contents

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All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

Release Notes

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

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

Custom Fields

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

Overview

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

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

Administrator Experience

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

Configuration / Feature Activation

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

Expense Pay

Enhanced User Interface in Expense Payment Manager

Overview

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

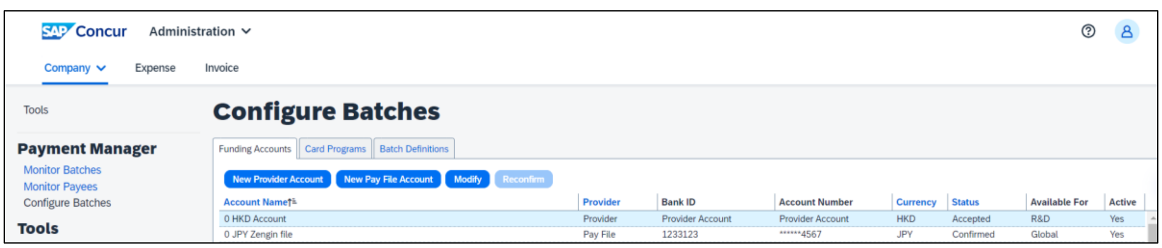
This update provides faster access to relevant information on screen in a simplified manner and reduces the number of clicks required to view the necessary information.

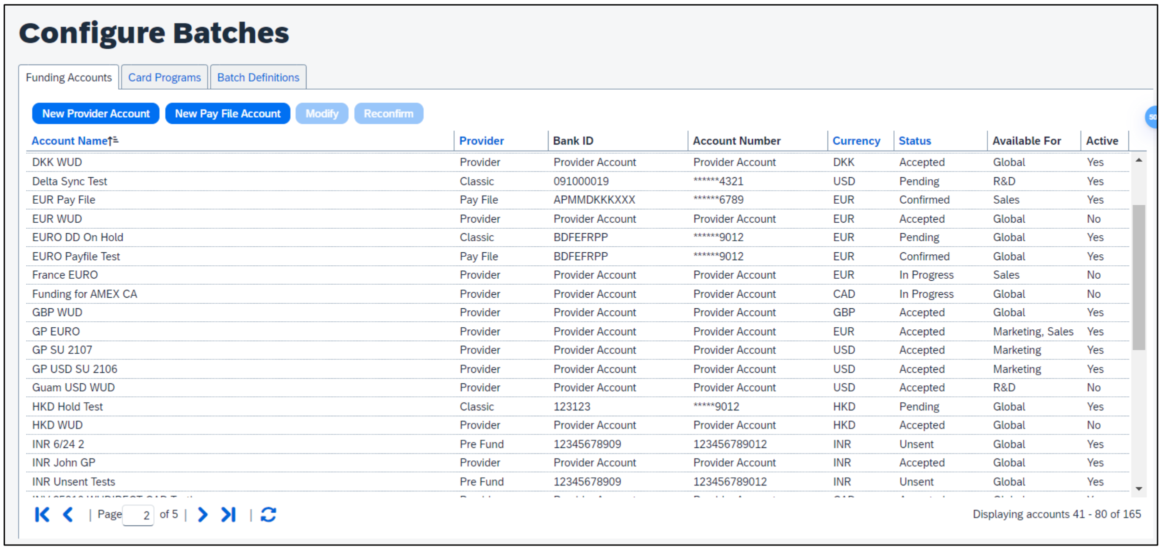
Administrator Experience

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

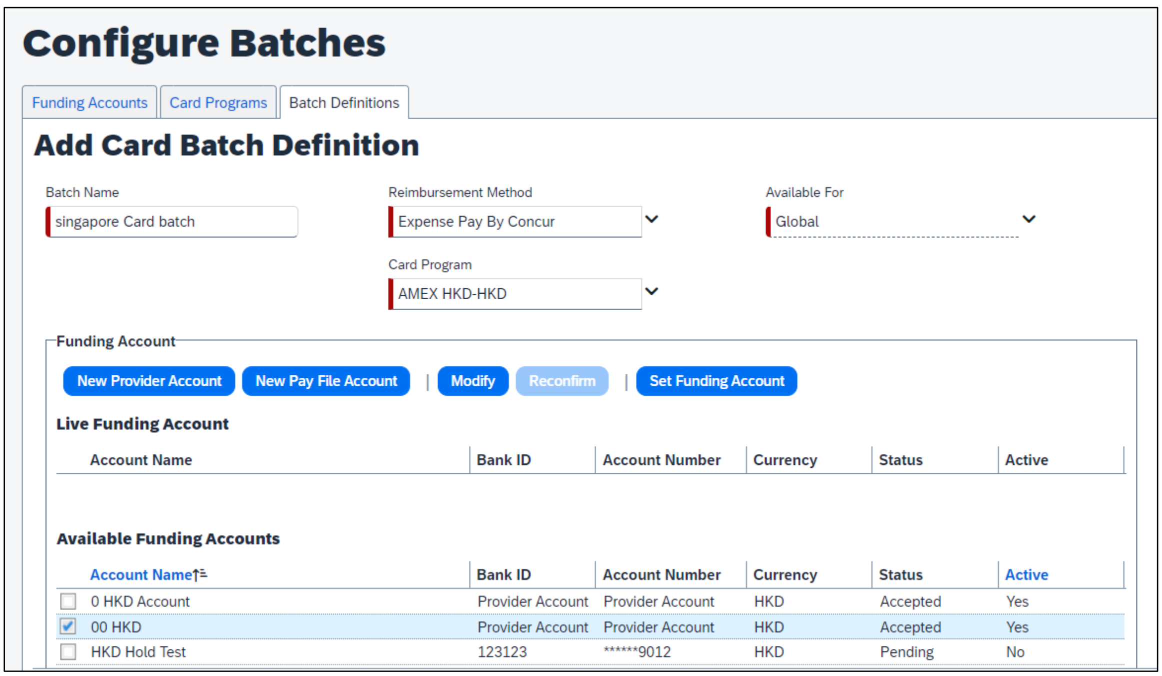
- The **Bank ID** column displays the term **Provider Account** instead of **Global Account** when using Convera as the payment provider.
- The **Account Number** column is populated with the term **Provider Account**. In the future, this will be used to display the provider account ID you setup with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

Example:





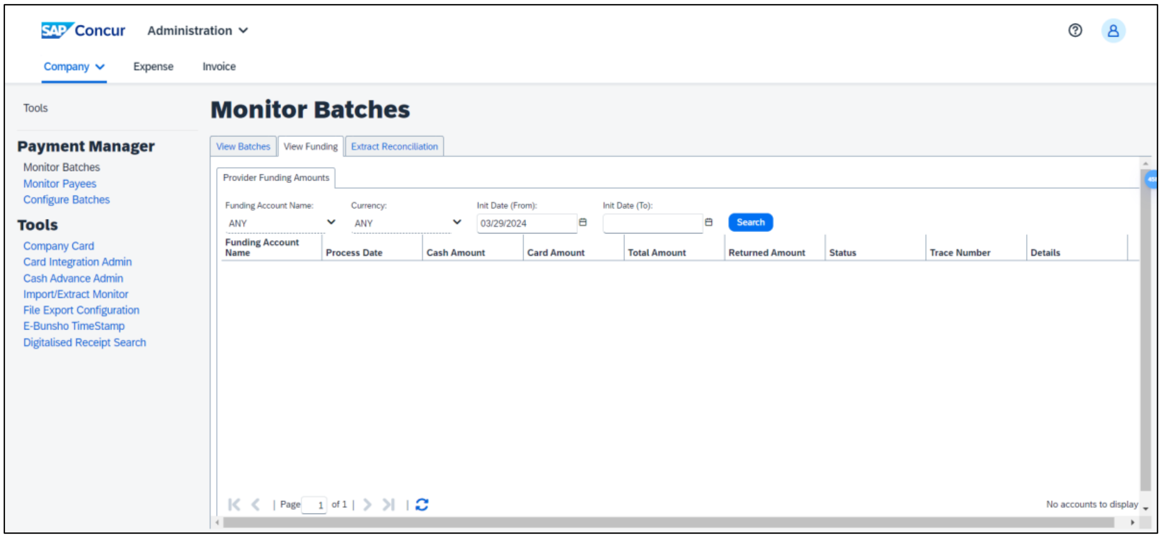
When you add a new card batch in the **Batch Defnitions** screen, selecting or changing the card program automatically displays a filtered list of funding accounts based on the currency used for the card program.



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

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

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



Configuration / Feature Activation

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

Updates to the Payment Status Timeline

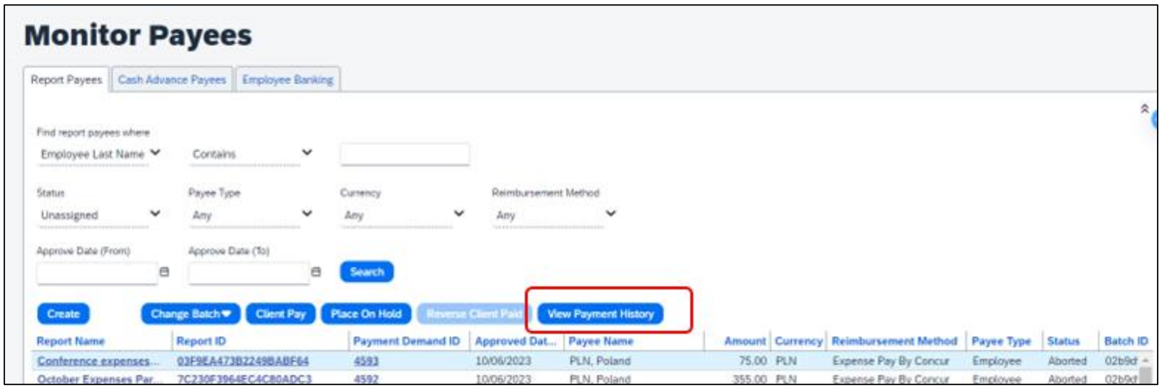
Overview

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

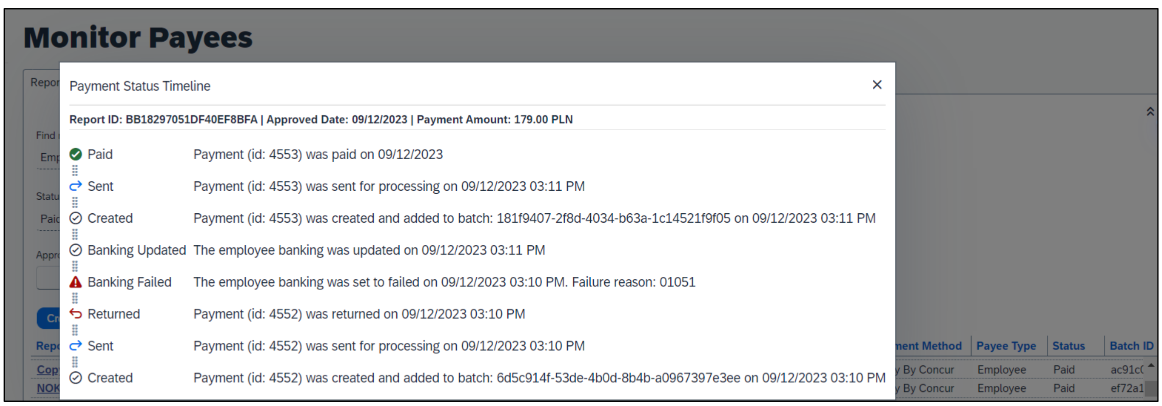
This update helps provide more meaningful information to the administrator when tracking a payment and help answering employee inquiries about their payments. It also provides faster access to more relevant information in a centralized and simplified display.

Administrator Experience

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



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



Configuration / Feature Activation

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

Localization

Removal of Expense Types Descriptions

Overview

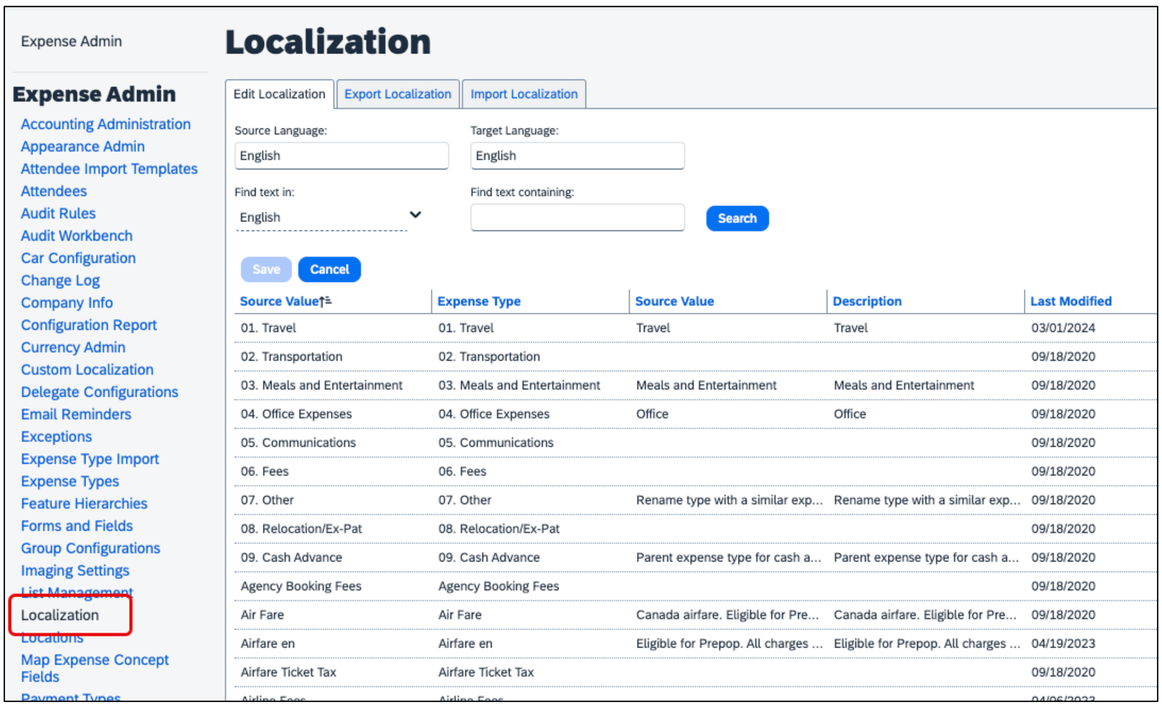
As of April 12th, 2024, SAP Concur has deprecated the descriptions for expense types. Currently, there is no possibility to set the descriptions for expense types in the Concur user interface or APIs, but these descriptions do display in the **Localization** tab in Concur Expense settings.

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

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

Administrator Experience

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



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

Configuration / Feature Activation

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

Mileage Service

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

Overview

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

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

Configuration / Feature Activation

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

For more information refer to the *Concur Expense: Car Configuration Setup Guide*, the *Concur Expense: Mileage Service Setup Guide*, and the *Concur Expense: Mileage Service Setup Guide for Concur Standard Edition*.

Miscellaneous

Keyboard Shortcuts for Expense Screens

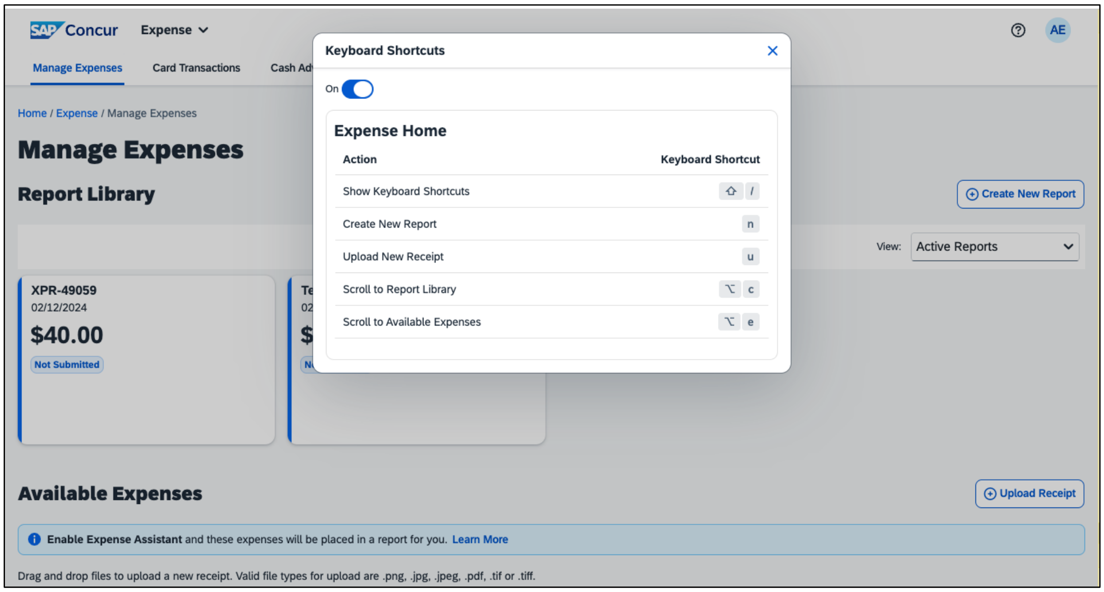
Overview

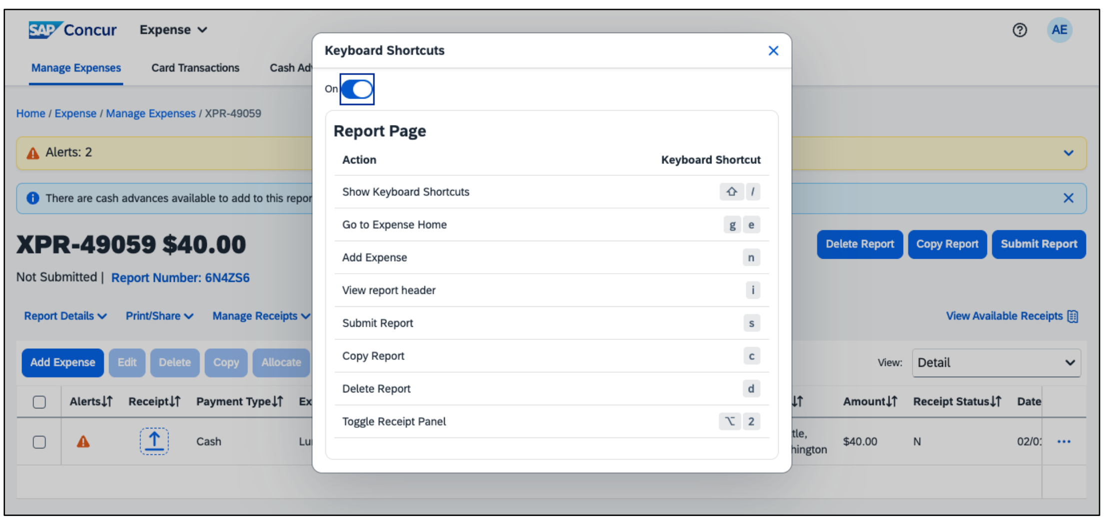
SAP Concur has enabled convenient keyboard shortcuts in selective Concur Expense screens such as **Expense Home**, **Report Page**, and **Expense Entry Page**. This update offers users a more convenient way to navigate the expense application faster, ultimately improving productivity, efficiency, and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

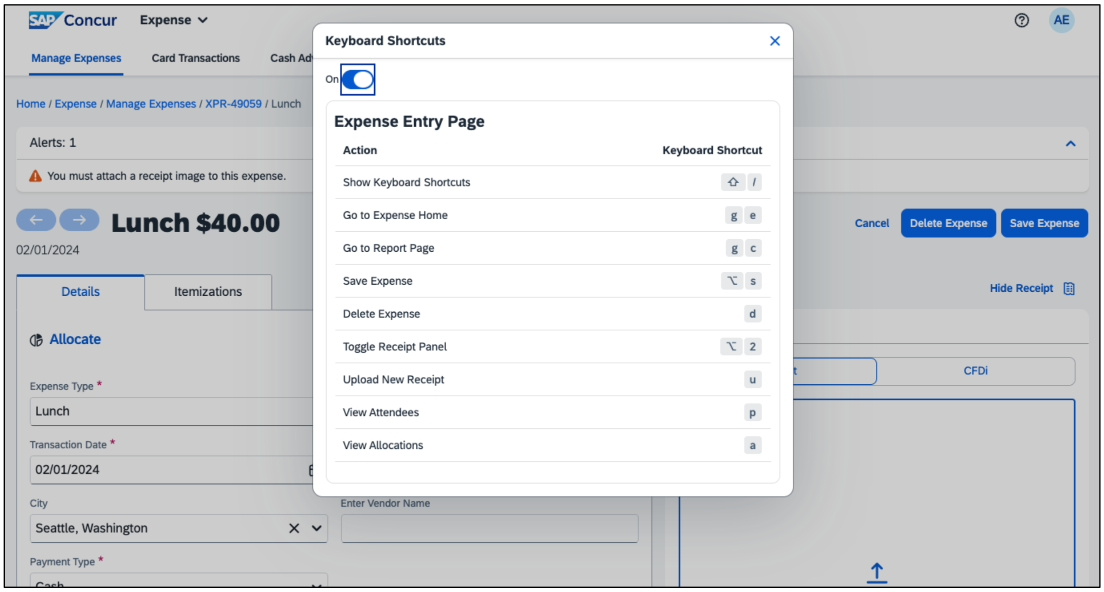
NOTE: This feature will currently be available in English only.

End-User Experience

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







Configuration / Feature Activation

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

Travel Allowance

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

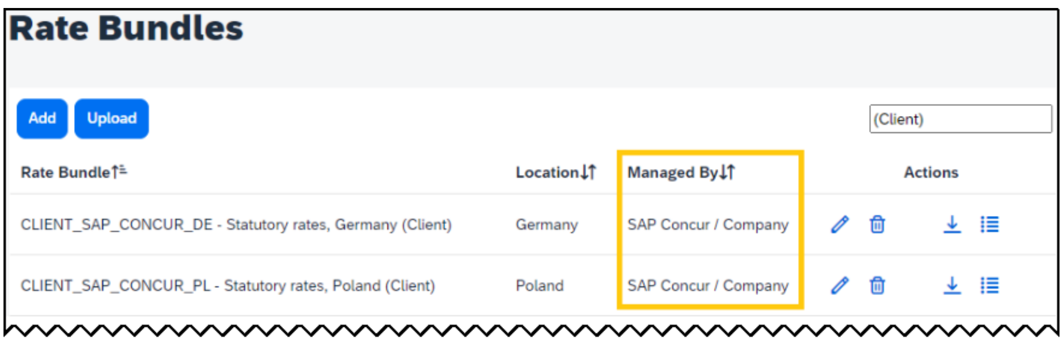
Overview

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

Create a New Rate Bundle from a Statutory Base Rate Bundle

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

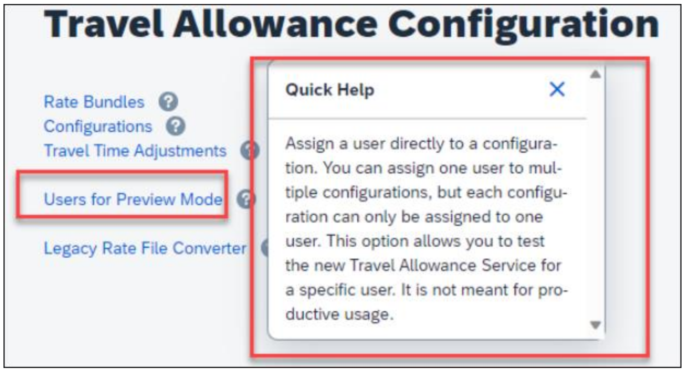
Testing can include changing the default Calculation Rules while still benefiting from automatic rate updates for the new bundle. For example, updating the default for **Day of exchange rate** to allow the default to be switched to first day of the itinerary, last day of the itinerary, or the start/end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



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

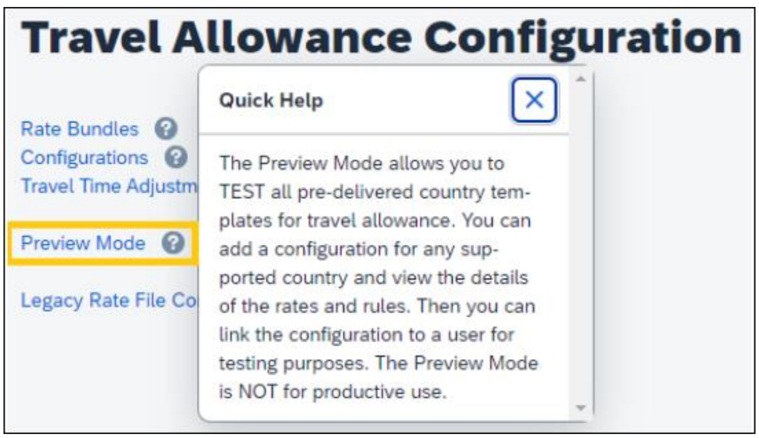
Enhanced Preview Mode for Travel Allowance Service

In October of 2023 the *Users for Preview Mode* feature was released. This feature allows the Legacy client without access to a Production Sandbox environment to test the Travel Allowance Service (TAS) prior to transition. This is done by selecting the **Users for Preview Mode** option in **Travel Allowance Configuration**.

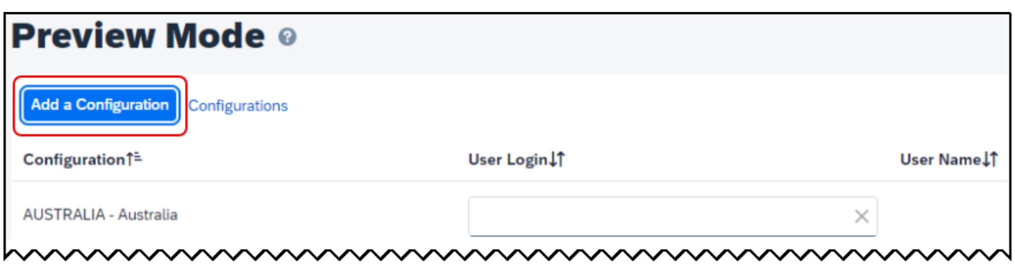


With the March 2024 release, several updates were made available to this feature:

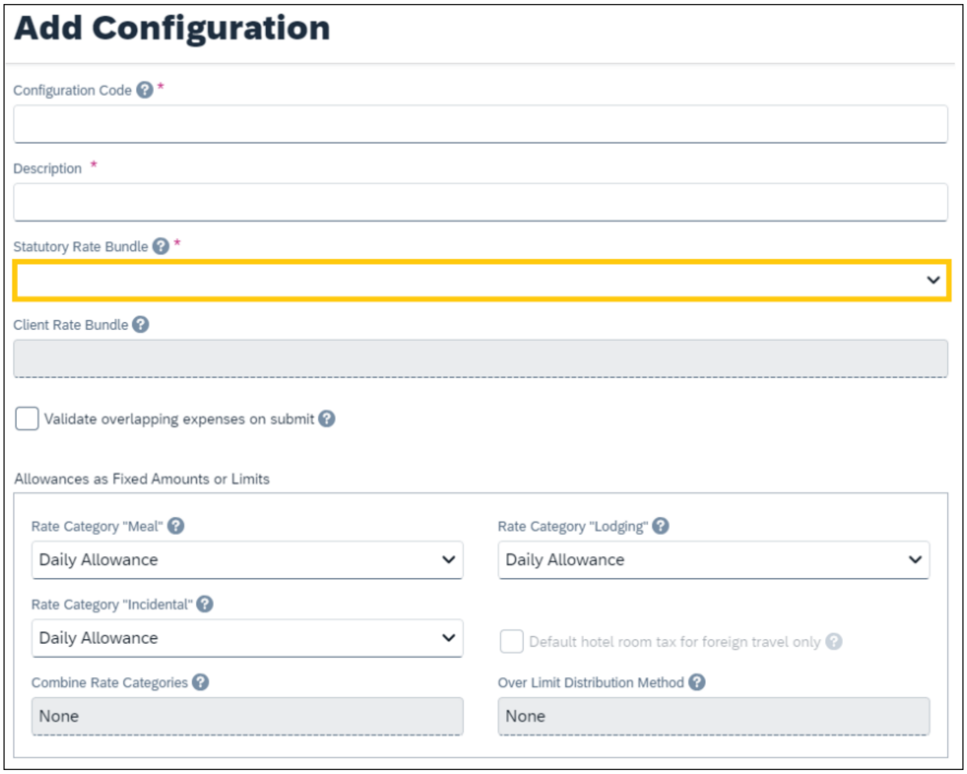
- **Preview Mode in Menu:** The **Users for Preview Mode** menu is changed to **Preview Mode** and updated Quick Help text is included:



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



When adding the new configuration, the administrator may update only a restricted set of fields and may select only those rate bundles that are marked under **Managed By** as *SAP Concur / Company*.



Configuration / Feature Activation

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

Planned Changes

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

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

Company Card

Planned Changes Enhancements to the Manage Transactions Screen

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

Overview

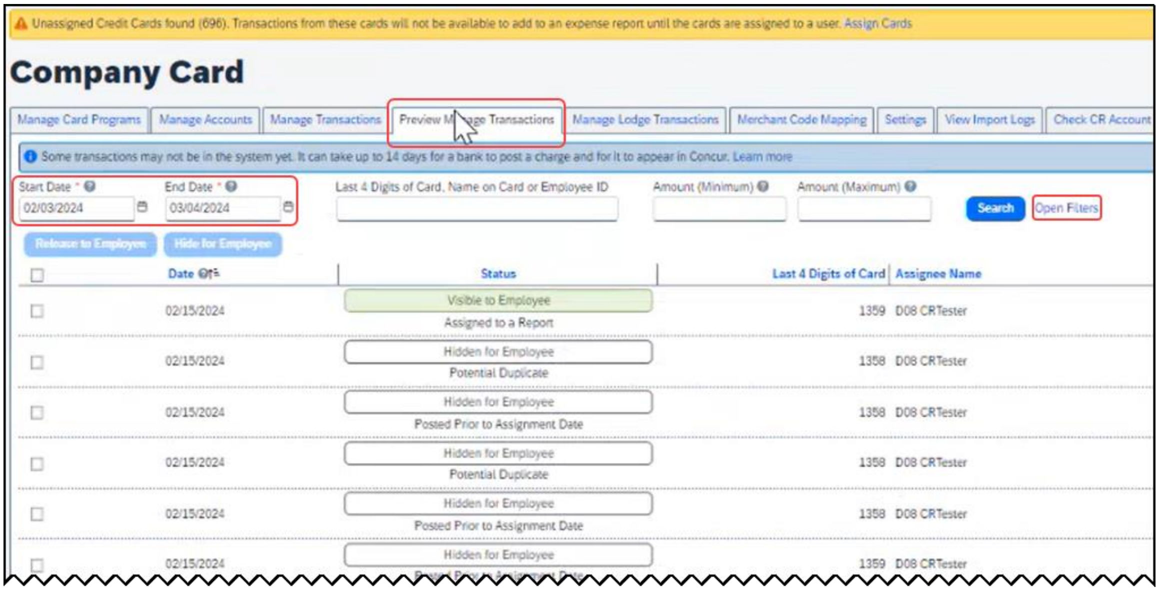
In late May, enhancements to the **Manage Transactions** screen will be available to the Company Card administrator for evaluation. These changes will be visible by default and the administrator may work with the new user interface and then decide to revert to the earlier version or continue with the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

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

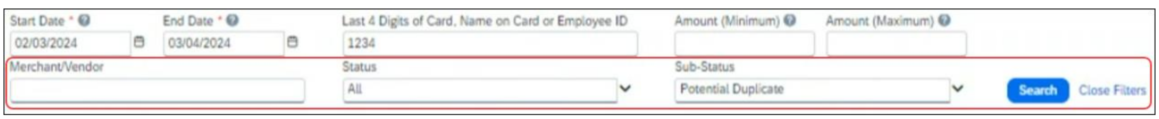
This feature improves the company card experience by automatically displaying search results from the previous 30 days with the ability to perform a more complex search that displays hidden, visible, duplicate, and expensed transactions in a column order view familiar to administrators working in a financial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

Administrator Experience

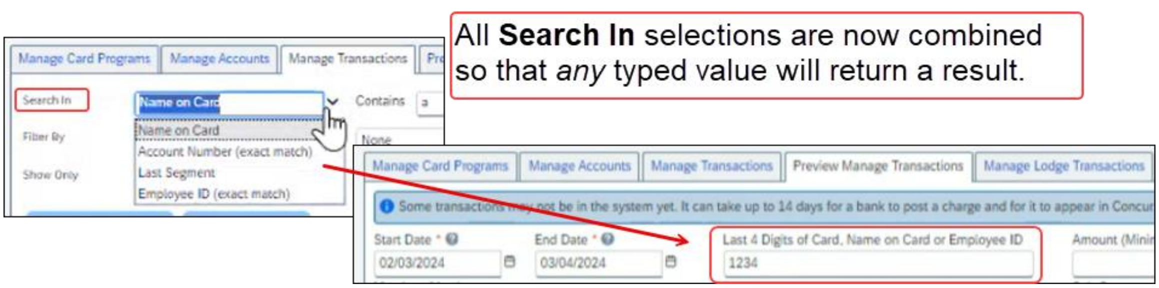
The Company Card administrator will see the simple search format of employee transactions of the previous 30 days. Transactions that are both hidden and visible to employees (including transactions that are already on an expense report) will be returned.



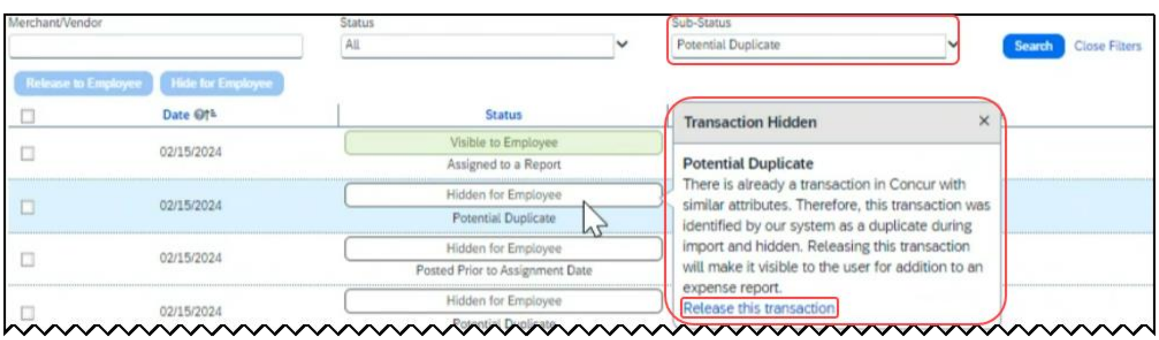
From this simple format, the administrator clicks **Open Filters** to refine the search:



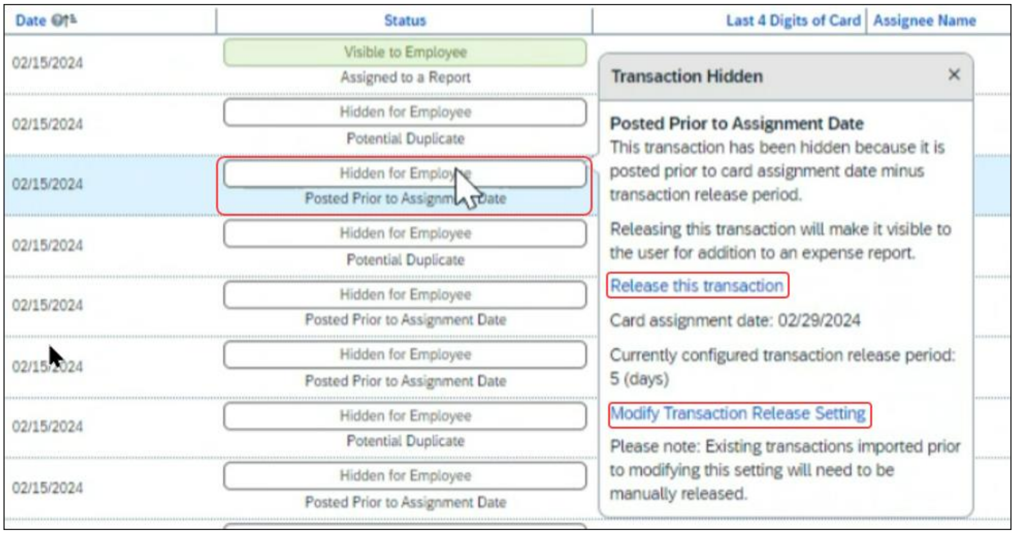
The **Last 4 Digits...** search now combines the logic for *all* the potential typed values:



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



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



Moving Between the Two Manage Transactions Windows

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

Configuration / Feature Activation

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

Receipts – ExpenseIt for Web

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

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

Overview

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

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

DEFAULT BEHAVIOR FOR NEW AND EXISTING USERS

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

Configuration / Feature Activation

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

Reports

Planned Changes Enhancements to the Report Timeline

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

Overview

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

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

PHASES

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

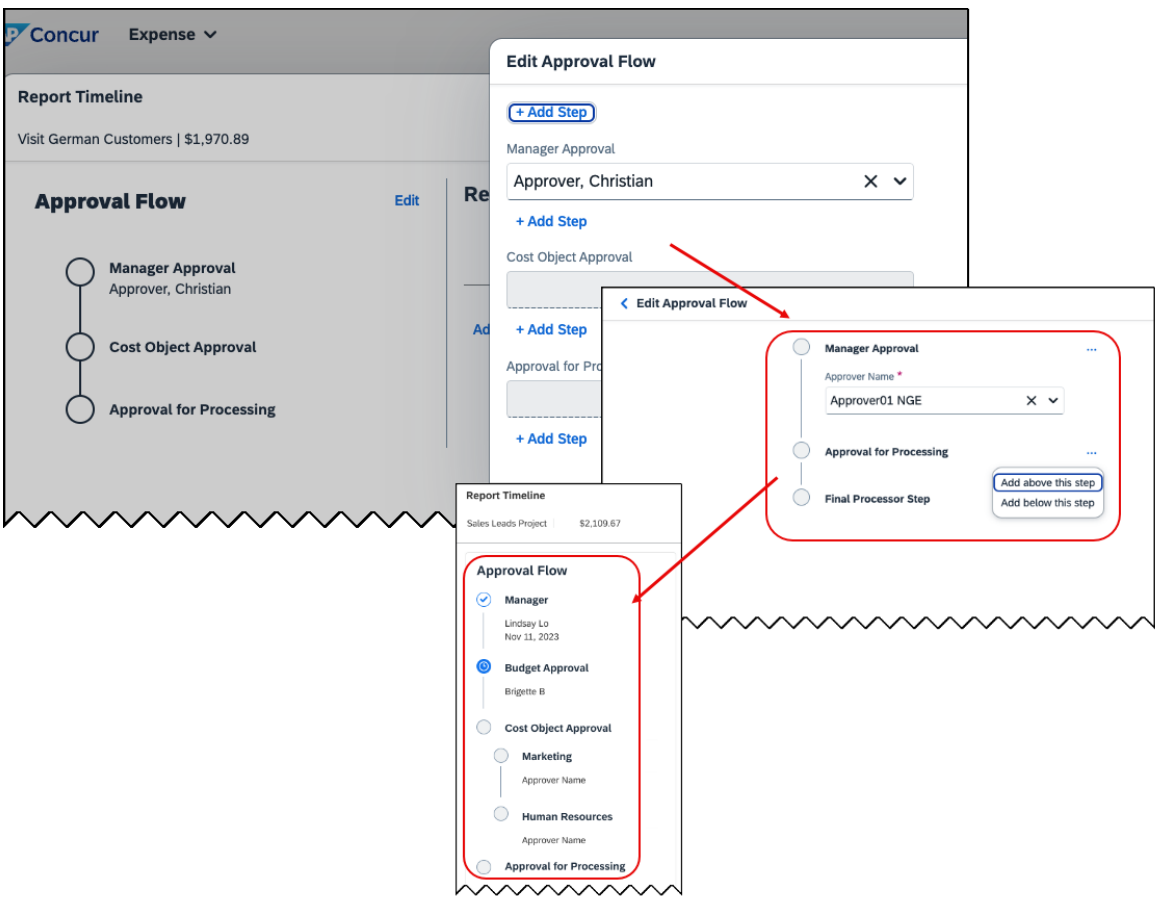
Phase	Date of Release
Phase 1: All customer test entities	April 16, 2024
Phase 2: All production entities	April 23, 2024

End-User Experience

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

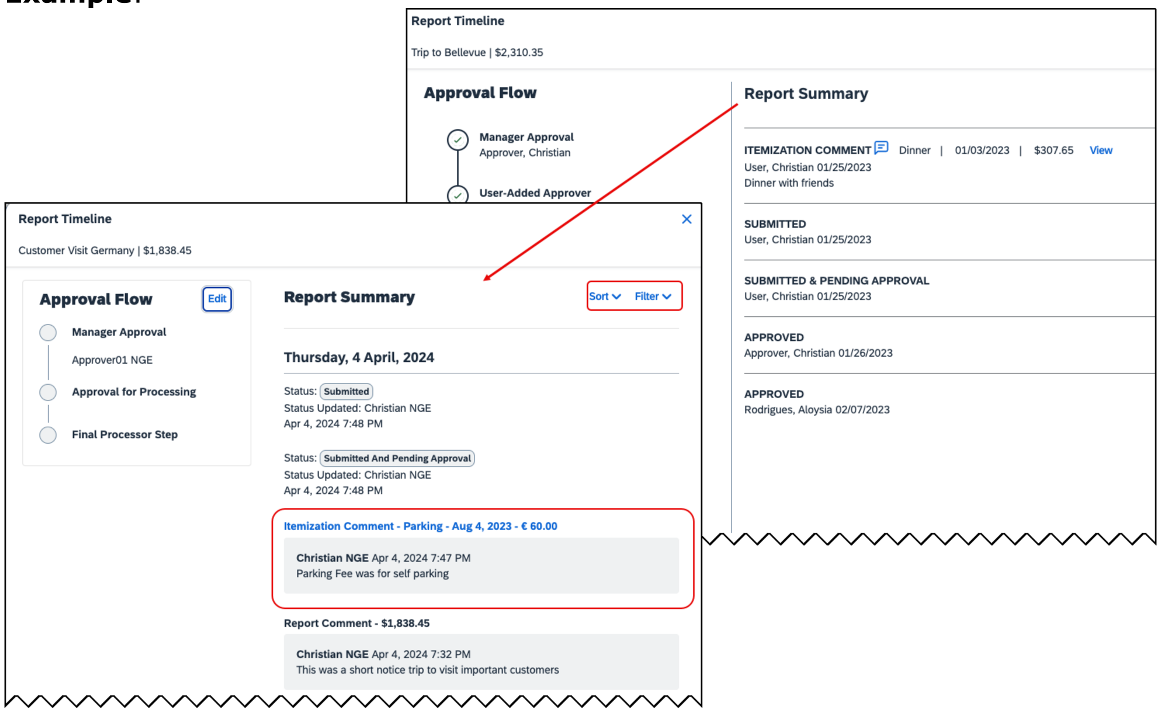
In the **Approval Workflow** section, the UI will be improved to display updated icons, approver names along with time and date of approval.

Example:



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

Example:



Configuration / Feature Activation

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

Planned Changes Preferred Name for Expense Submitter

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

Overview

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

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

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

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

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

End-User Experience

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

Configuration / Feature Activation

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

User Interface Changes

Planned Changes Update to the Report Status Indicator

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

Overview

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

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

End-User Experience

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

Configuration / Feature Activation

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

Client Notifications

Accessibility

Accessibility Updates

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

Gender Diversity

Gender Diversity Planned Features and Changes

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

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

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

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

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

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

Supported Browsers

Supported Browsers and Changes to Support

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

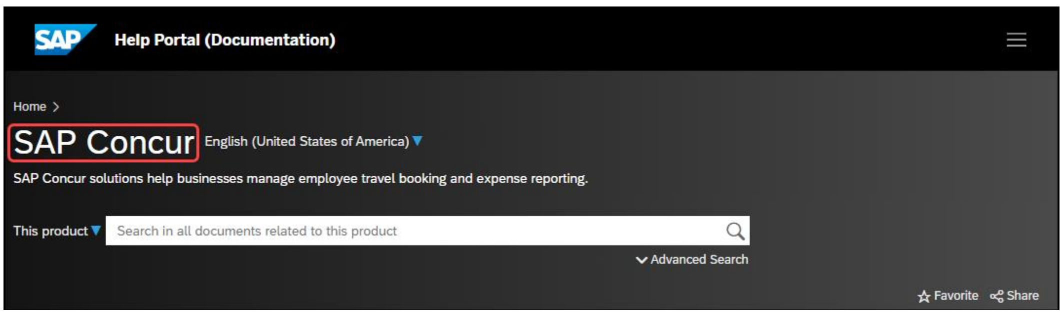
When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes*.

Additional Release Notes and Other Technical Documentation

Online Help

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

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



SAP Concur Support Portal – Selected Users

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

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

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

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

Cases

Check Support Case Status

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

To check the status of a submitted case

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

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

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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.