

**SAP Concur Release Notes**  
**Concur Detect by AppZen**

Month	Audience
Release Date: June 08, 2022 Initial Post: Monday, June 20	SAP Concur Client <b>FINAL</b>

**\*\* FINAL \*\***

The enhancements and changes described in this document may or may not be included in this release. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

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# Release Notes

## **\*\*Ongoing\*\* Expense Audit - Workbench Enhancements**

The following features have been soft-released as a hotfix on June 8, 2022. Further deployment will be carried out during the month of July.

### **New Feature: Team Intelligence**

#### **Overview**

The Team Intelligence dashboard provides managers an overview of their team's spend across cost centers and countries (organizations) for a selected time frame. Currently, admins have to depend on AppZen Support to enable this feature.

This feature will allow admins to enable and configure the Team Intelligence Dashboard from the Concur Detect UI directly. This removes the dependency on the AppZen Support team.

#### **Enable Team Intelligence**

The screenshot displays the 'Enable Team Intelligence' configuration page. The left sidebar shows the navigation menu with 'Setup & Configuration' highlighted. The main content area is titled 'Enable Team Intelligence' and contains the following status indicators:

- SSO Enabled : [?](#) Yes
- User Sync Status : [?](#) Last user synch at 03/06/2022
- Deep Hierarchy : [?](#) 5 levels
- Circular Hierarchy : [?](#) 5 users Root User - Traveler (traveler@turingco.com)  
[Set Root User](#) [?](#)

Below these indicators, a note states: ( If pre-requisites are not met contact Appzen support team )

At the bottom, there is a toggle switch for 'Enable Team Intelligence' which is currently turned 'On'.

#### **Prerequisites for enabling Team Intelligence**

The following items are prerequisites to enable the Team Intelligence feature.

- **SSO Enabled:** SSO is mandatory to access Team Intelligence dashboard.
- **User Sync Status:** Ensures the customer's organization hierarchy is up to date. The last user sync date must be displayed on the UI.
- **Deep Hierarchy:** The number of levels in the customer's organization.

- **Circular Hierarchy:** The number of users (at any level of the hierarchy) whose position in the hierarchy includes other users both above and below them. Please ensure that the root user is set.
- **Ability to set root user:** If a Circular Hierarchy is present, then it is necessary to set a root user. It is suggested that the root user is the CEO of the company.

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**NOTE:** Team Intelligence cannot be enabled if circular hierarchy is present. This can be addressed on screen by selecting the root user.

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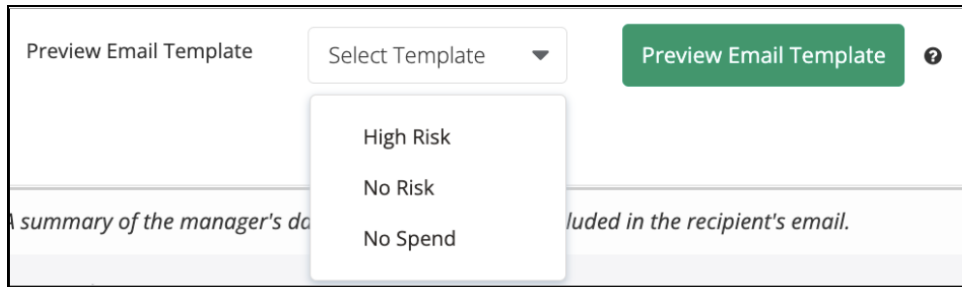
To enable Team Intelligence, as the customer or administrator, click the **Enable Team Intelligence** toggle at the lower part of the screen.

### Configure Team Intelligence

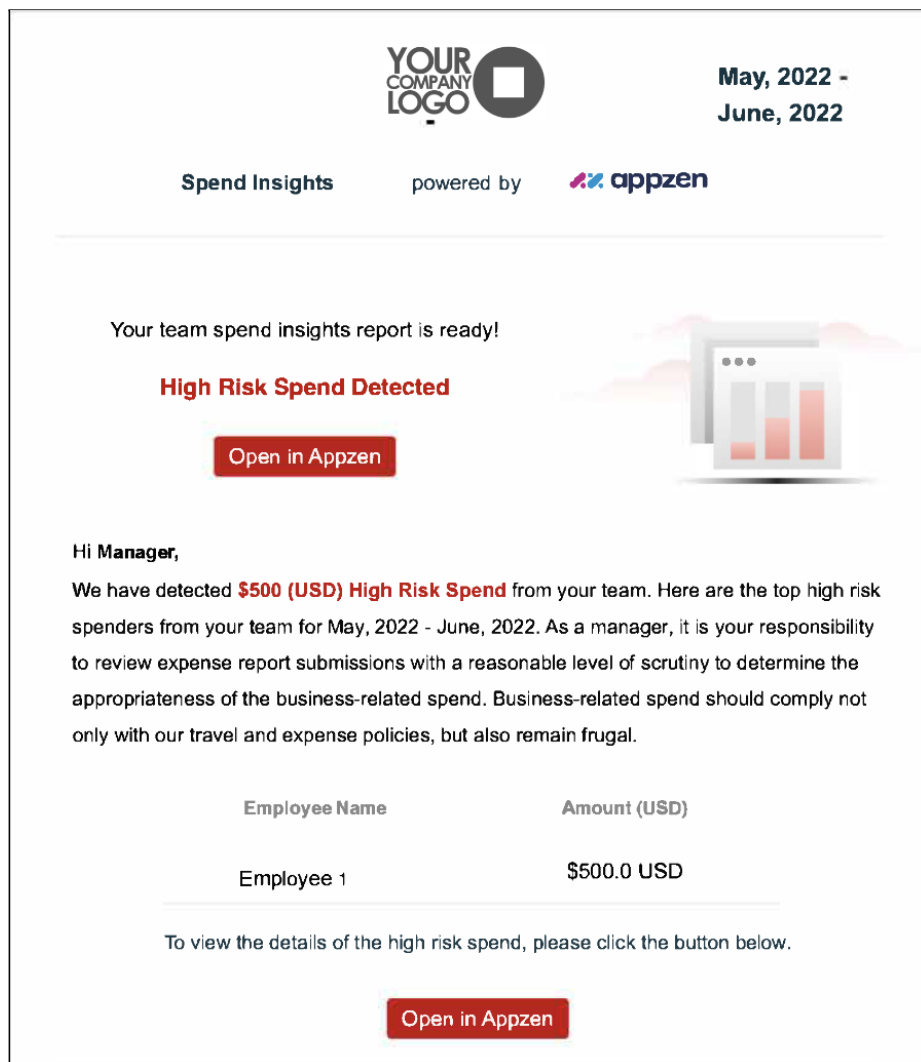
Admins can configure Team Intelligence emails sent to managers to provide insight into the total expenses submitted by their teams.

- **Last User synchron date:** The last time the customer's organization hierarchy was synced. This is visible on the UI.
- **Staging date:**
  - ◆ This is the date up to which the data collection is scheduled.
  - ◆ Admins can select the staging date to schedule the next staging process.
  - ◆ Emails will be sent on the first Monday after this date.
  - ◆ If the Staging date is Monday, the email will be sent in the next week.
  - ◆ If the staging date set is the 15<sup>th</sup> day of the month, the data from the 15<sup>th</sup> of the last month until the 14<sup>th</sup> of the current month will be analyzed for Team Intelligence emails.
- **Best Practices:** If a customer requires data for the whole of last month i.e. from 1<sup>st</sup> to 31<sup>st</sup> of the last month, the user is recommended to set the staging date to the 1st.

- **Settings:** Team Intelligence email templates cannot be edited; this includes the subject line and email body.
- **Preview Email Template:**



- ◆ Users will be able to preview the template of the email based on the risk in spend (High Risk, No Risk, No Spend) selected from the drop down list.
- ◆ **High Risk:** Managers will receive email formatted using the following template if any employees have submitted expenses that are flagged as High Risk.



- ◆ **No Risk:** Managers would receive email formatted using the following template if the expenses submitted by employees are considered No Risk (safe).



**May, 2022**  
**June, 2022**

**Spend Insights** powered by 

Your team spend insights report is ready!

**May, Expense Spend**

[Open in Appzen](#)



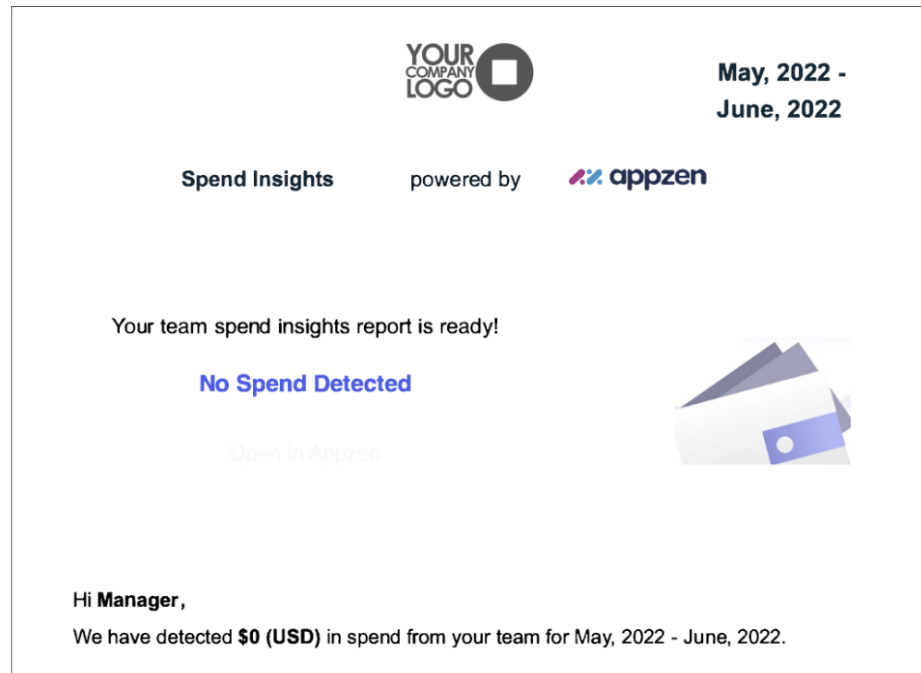
**Hi Manager,**

Here's a summary of your team's spend insights for May, 2022 - June, 2022. As a manager, it is your responsibility to review expense report submissions with a reasonable level of scrutiny to determine the appropriateness of the business-related spend. Business-related spend should comply not only with our travel and expense policies, but also remain frugal.

Employee Name	Amount (USD)
Employee1	\$500.0 USD
Employee 2	\$500.0 USD

To view the details of your team spend, please click the button below.

- ◆ **No Spend:** Managers will receive email formatted using the following template if there are no expenses submitted by employees.



- ◆ The preview will be generated on the basis of the last staged data.
- ◆ If a customer wants to include their logo within their email templates, they must contact AppZen Support and provide their logo. If a logo is not provided, the AppZen logo will be displayed by default.

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**NOTE:** This feature will be enabled from July 2022 onwards, after which customers will receive Team Intelligence emails in the aforementioned formats.

The Customer Success team will support customers through the setup of this feature.

We will soft launch this feature before making it live for all existing Team Intelligence customers.

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## Expense Audit - Configuration Updates

There are no Configuration Updates in this release.

## Issue Fixes

There are no Issue Fixes in this release.

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