Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: January 13, 2018 Update #1: Tuesday, January 16, 12:00 PM PT	Client – FINAL

Contents

Release Notes

This document contains the release notes for the Invoice functionality for Concur Standard edition. Clients with the Expense or Travel products should review the respective release notes, located on the Concur Support Portal.

Product Settings

Option to Hide Self-Education ? Icon

Overview

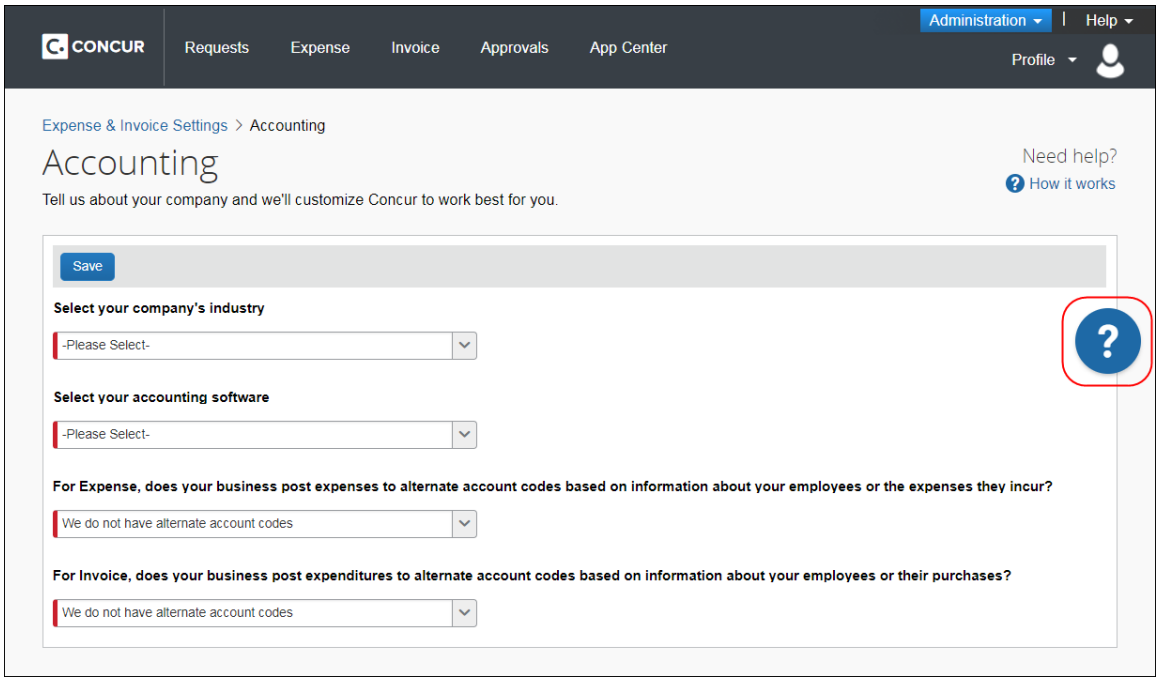
Administrators can now temporarily hide the question mark (?) icon used to access the self-education pane on the Product Settings pages and other pages where the self-education pane is available.

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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



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

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

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

Configuration/Feature Activation

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

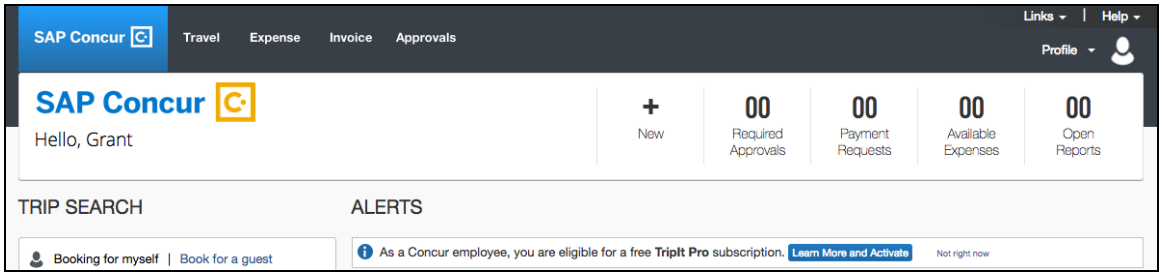
SAP Concur Logo

New SAP Concur Logo

Overview

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

The new logo appears in the upper-left corner of each page.



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

Both the SAP and Concur logos appear in the footer.

If a TMC has rebranded in the footer, in addition to the TMC logo, the SAP logo will appear.

Configuration/Feature Activation

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

Planned Changes

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

Budget

Planned Change New Budget Feature in Early Adopter Program

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

Overview

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

This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Invoice (payment requests and purchase requests).

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

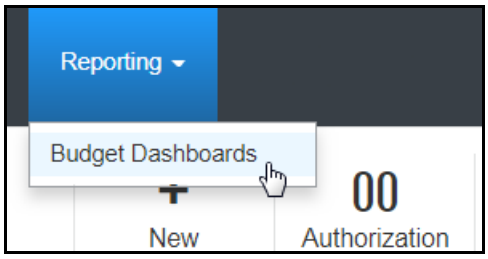
In addition, the Budget feature is available for the Concur mobile app for Invoice and is part of the Early Adopter Program. Please note that the release for the Concur mobile app occurs seven to ten days after the regular release.

BUSINESS PURPOSE/CLIENT BENEFIT

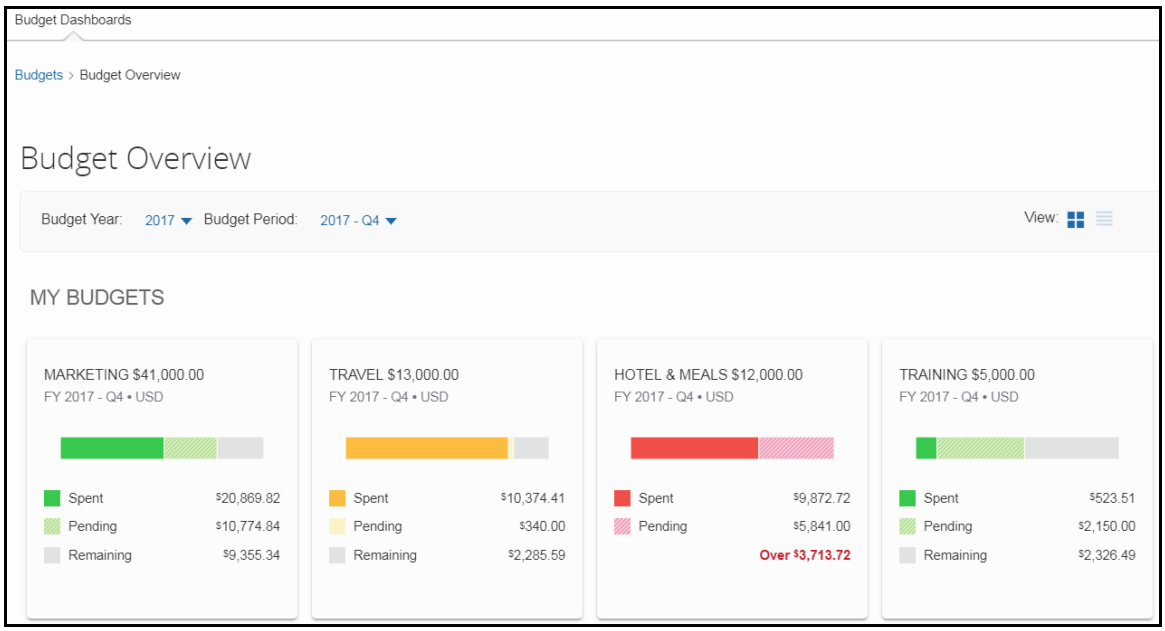
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Invoice (payment requests and purchase requests) clients.

What the User Sees

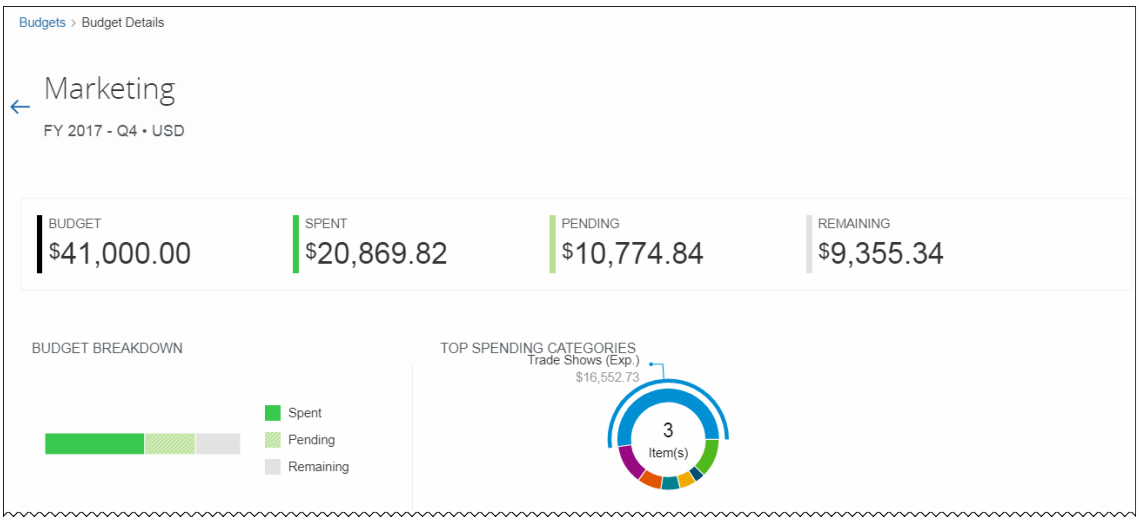
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.

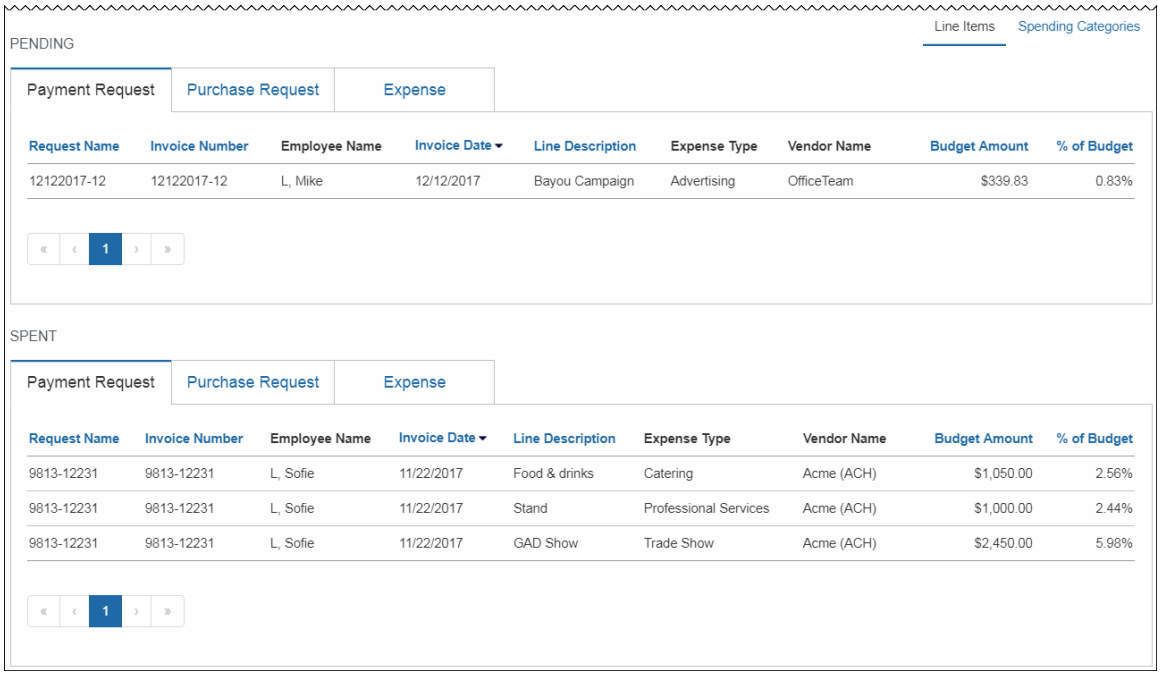


Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



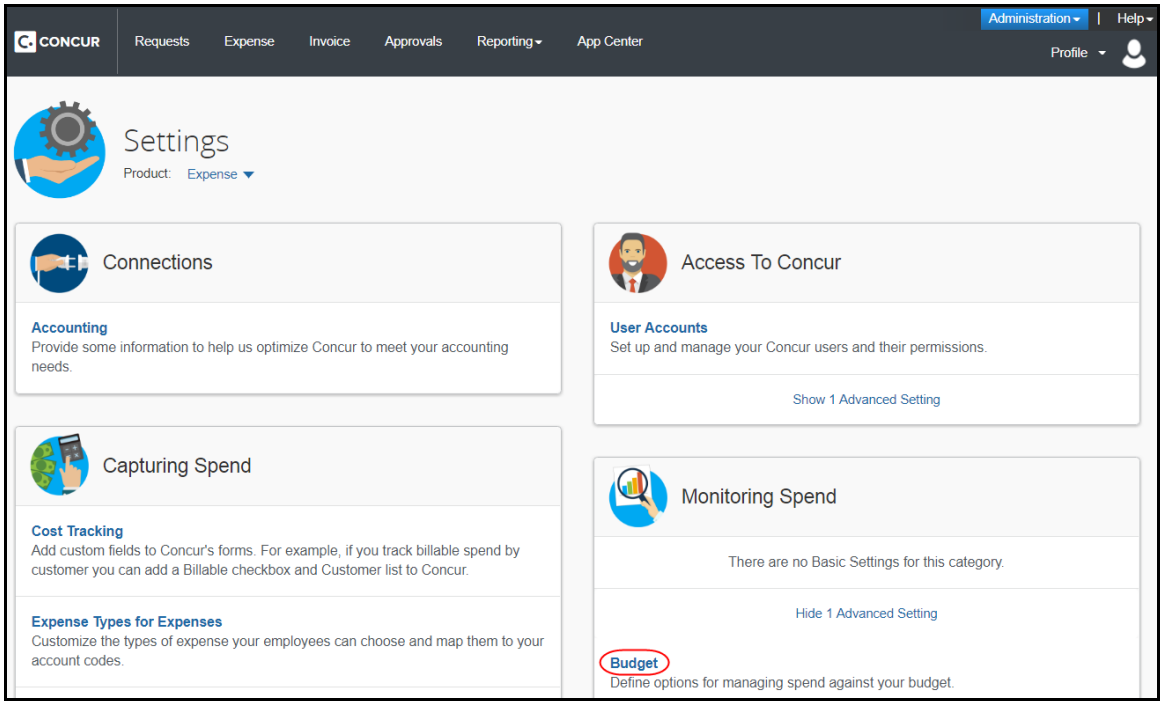
Clicking on one of the budgets will show details about that budget.





What the Admin Sees

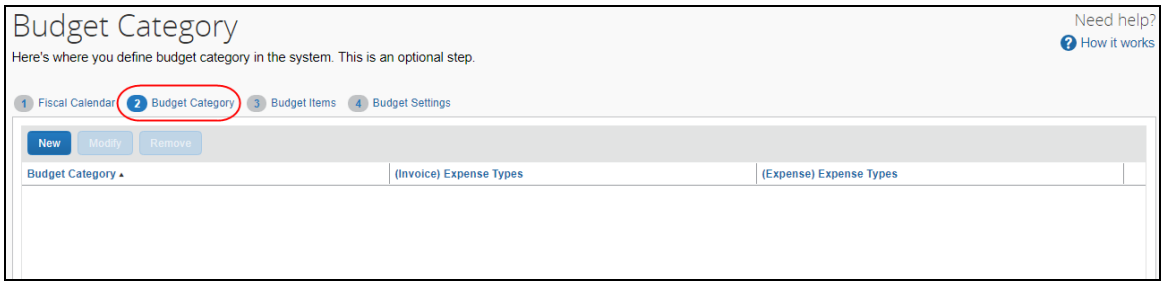
The admin will see a new setting, **Budget**, in the **Monitoring Spend** section in Product Settings.



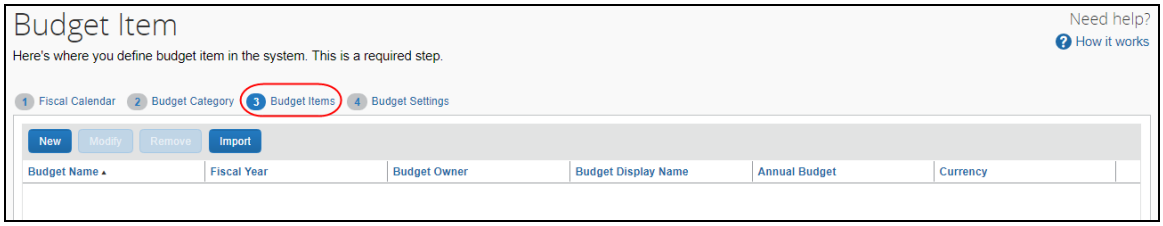
By clicking the **Budget** link, admins will be taken to the configuration pages of Budget.

Fiscal Calendar tab:

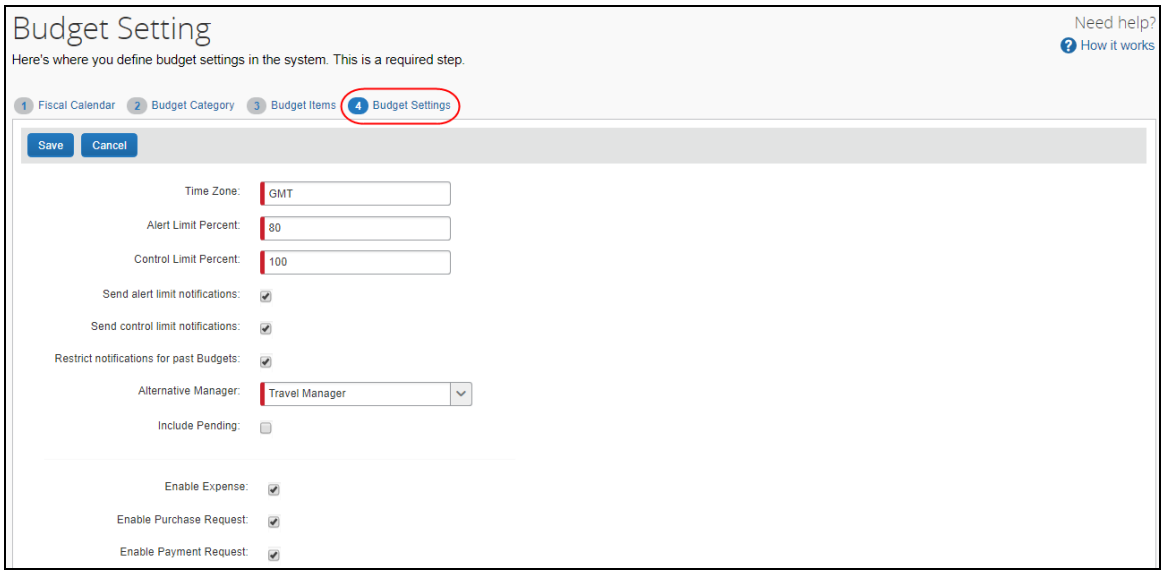
Budget Category tab:



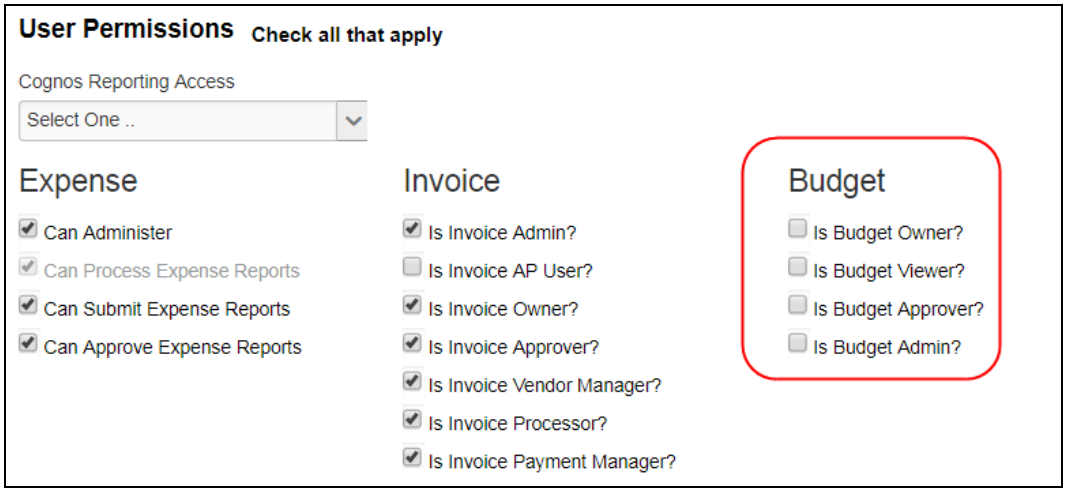
Budget Items tab:



Budget Settings tab:



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



Configuration/Feature Activation

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

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

Text FTP

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

Overview

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

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

What This Means – The Client Experience

Transfer of data to and from Concur using plain text FTP after the End of Support date will result in a failure of incoming connections. Clients using plain text FTP must utilize one of the approved secured methods to continue transferring data as outlined

in the File Transfer User Guide. This change is required on the client side, and Concur is available to support these efforts.

Configuration/Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

Invoice

Planned Change Tax Codes Soon Available

Overview

Already existing for Invoice Professional clients, tax codes will soon be available for Invoice Standard clients. Depending on the country pack selected, the tax codes will be customized per the client's locale. A new **Taxation** setting will be available where clients can add, modify, and delete tax codes that are used on payment requests.

NOTE: Tax codes will also be applicable to Capture Processing.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement makes it easier for clients to work with VAT.

What the User Sees

The user will be able to select tax codes from a list on their payment request.

What the Admin Sees

The admin will see a new **Taxation** setting where they will be able to configure and manage tax codes.

Configuration/Feature Activation

The admin needs to configure the tax codes in a new **Taxation** setting in the Invoice Administration area.

Planned Change Check for Missing Account Code Later in Workflow

Overview

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

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

Privacy Agreement Page

Planned Change Removing the "Privacy Agreement" Page

Overview

For customers who currently display the **Privacy Agreement** page to users, be aware that on *April 14, 2018*, Concur will eliminate that page. This means that the privacy agreement will no longer display, under any circumstances. In addition, the

options to customize the privacy agreement text and to apply policy (for example, to require that a user accept the privacy agreement) will be removed.

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

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

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

FAQs

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

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

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

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

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

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

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

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

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

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

Q. Who can I contact for more information?

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

Configuration/Feature Activation

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

Client Notifications

Subprocessors

Concur Non-Affiliated Subprocessors Notice

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

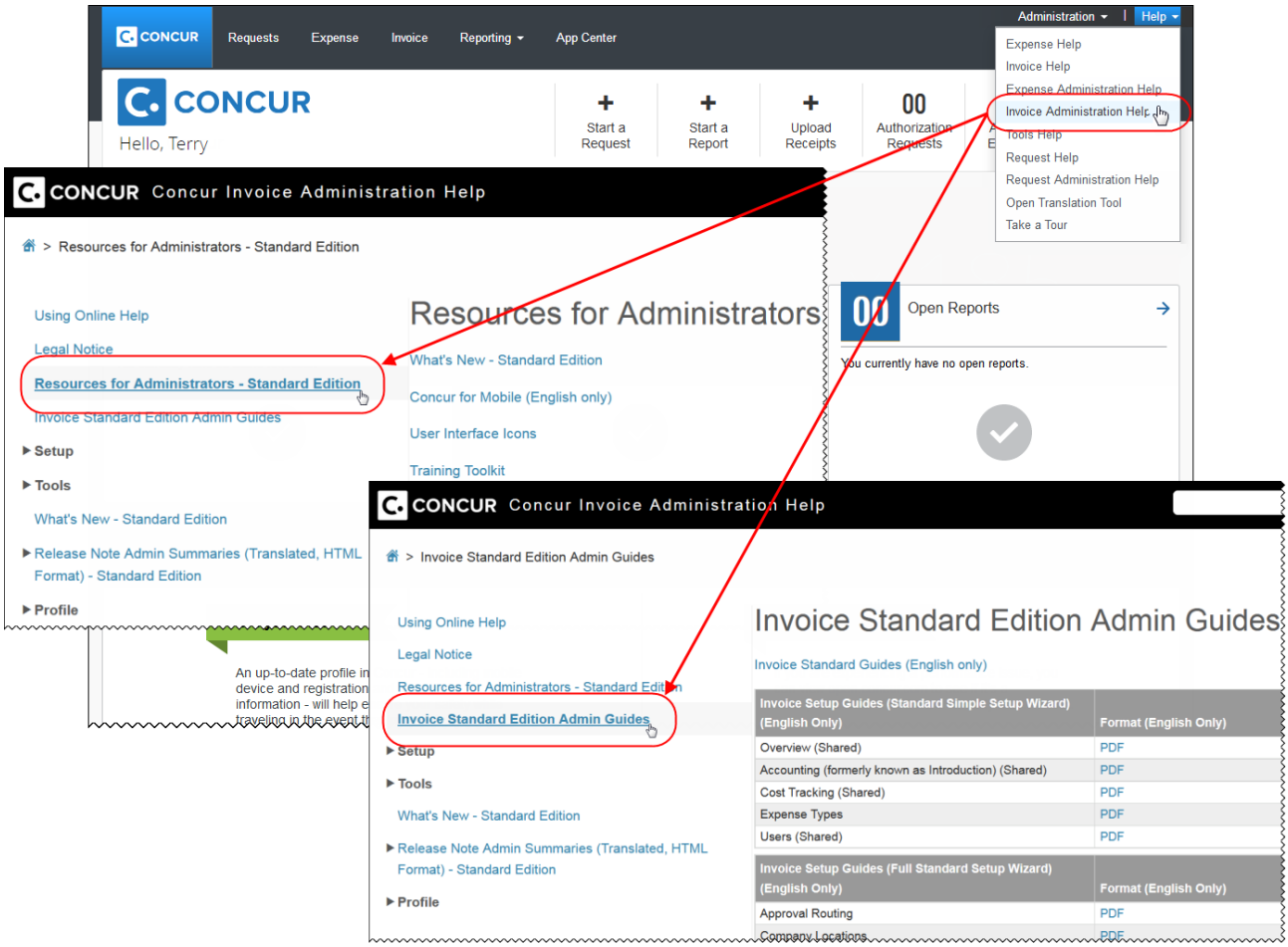
The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

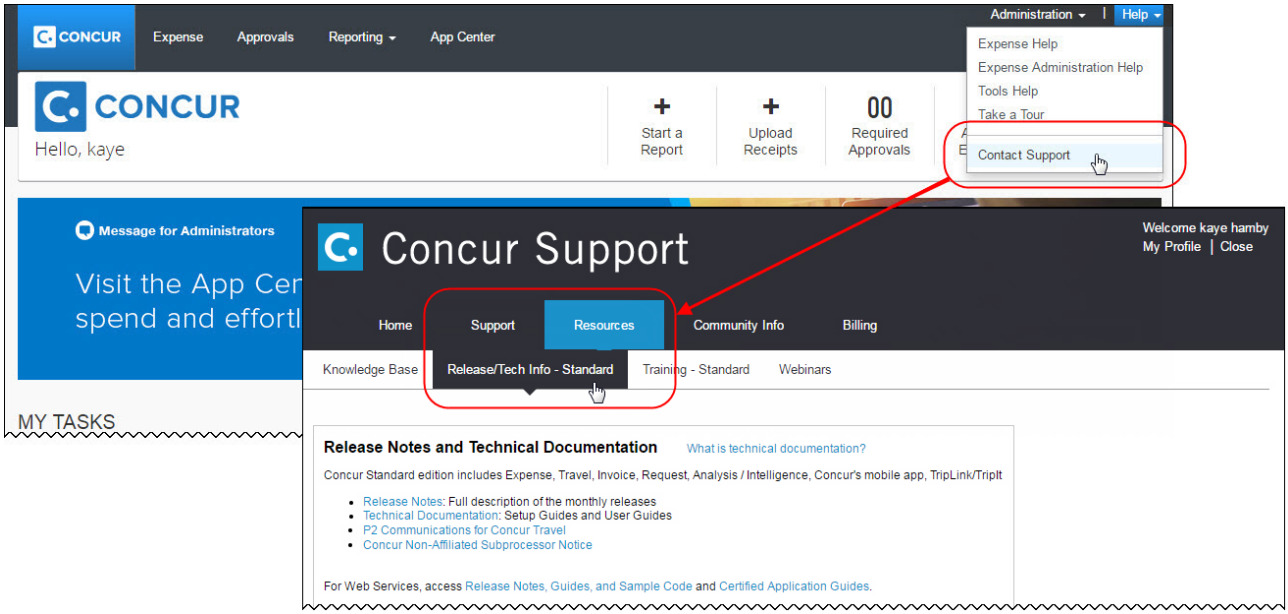
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.



Concur Support Portal – Selected Users

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

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


CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Expense Help
Expense Administration Help
Tools Help
Take a Tour
Contact Support
CONCUR
Hello, kaye
Start a Report
Upload Receipts
00
Required Approvals
Message for Administrators
Visit the App Cer
spend and effortl
MY TASKS
Concur Support
Welcome kaye hamby
My Profile | Close
Home
Support
Resources
Community Info
Billing
Knowledge Base
Release/Tech Info - Standard
Training - Standard
Webinars
Release Notes and Technical Documentation
What is technical documentation?
Concur Standard edition includes Expense, Travel, Invoice, Request, Analysis / Intelligence, Concur's mobile app, TripLink/TripIt
Release Notes: Full description of the monthly releases
Technical Documentation: Setup Guides and User Guides
P2 Communications for Concur Travel
Concur Non-Affiliated Subprocessor Notice
For Web Services, access Release Notes, Guides, and Sample Code and Certified Application Guides.

Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: February 10, 2018 Update #1: Friday, February 23, 1:00 PM PT	Client – FINAL

Contents

Release Notes

This document contains the release notes for the Invoice functionality for Concur Standard edition. Clients with the Expense or Travel products should review the respective release notes, located on the Concur Support Portal.

Invoice

Field Validation Enhancement

Overview

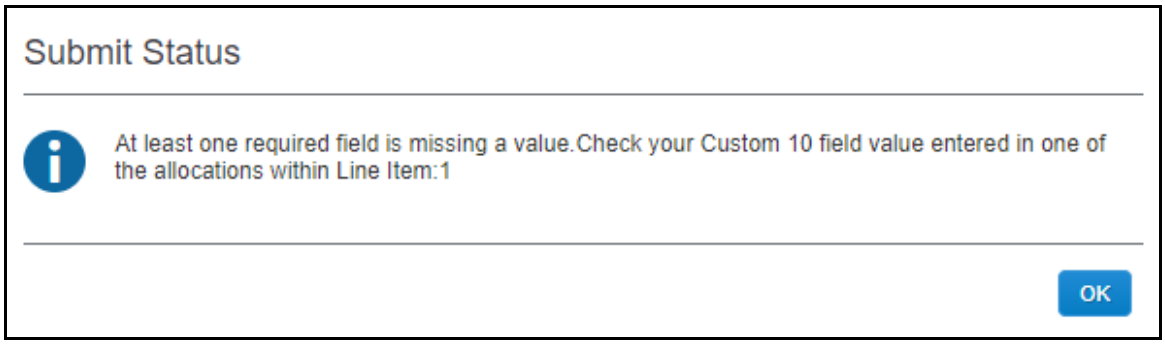
Invoice has enhanced the field validation message when clients submit a payment request that is missing a field value. Clients are now informed which field that has an incorrect value including the line item number if the issue is at the line item or at the allocation level.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement makes it easier for clients to correct a field value.

What the User Sees

The user will see a message with detailed information when they submit a payment request that is missing a field.



Configuration/Feature Activation

This feature is automatically on. There are no configuration steps.

Tax Codes Now Available

Overview

Already existing for Invoice Professional clients, tax codes are now available for Invoice Standard clients who use country packs to track VAT (Canada, UK, Japan,

and Australia). Depending on the country pack selected, the tax codes will be customized per the client's locale. A new **Taxation** page will be available where clients can add, modify, and delete tax codes that are used on payment requests.

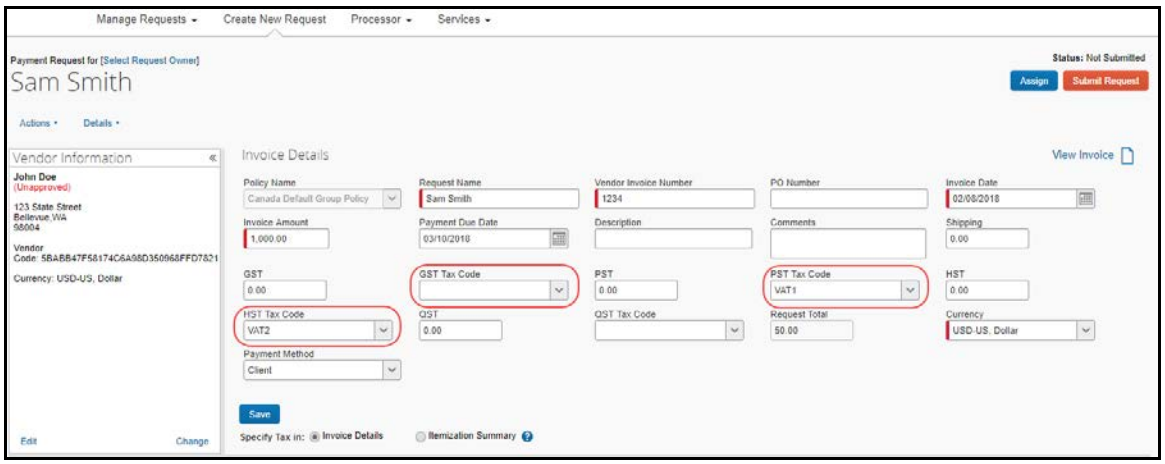
NOTE: Tax codes are also applicable to Capture Processing.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement makes it easier for clients to work with VAT.

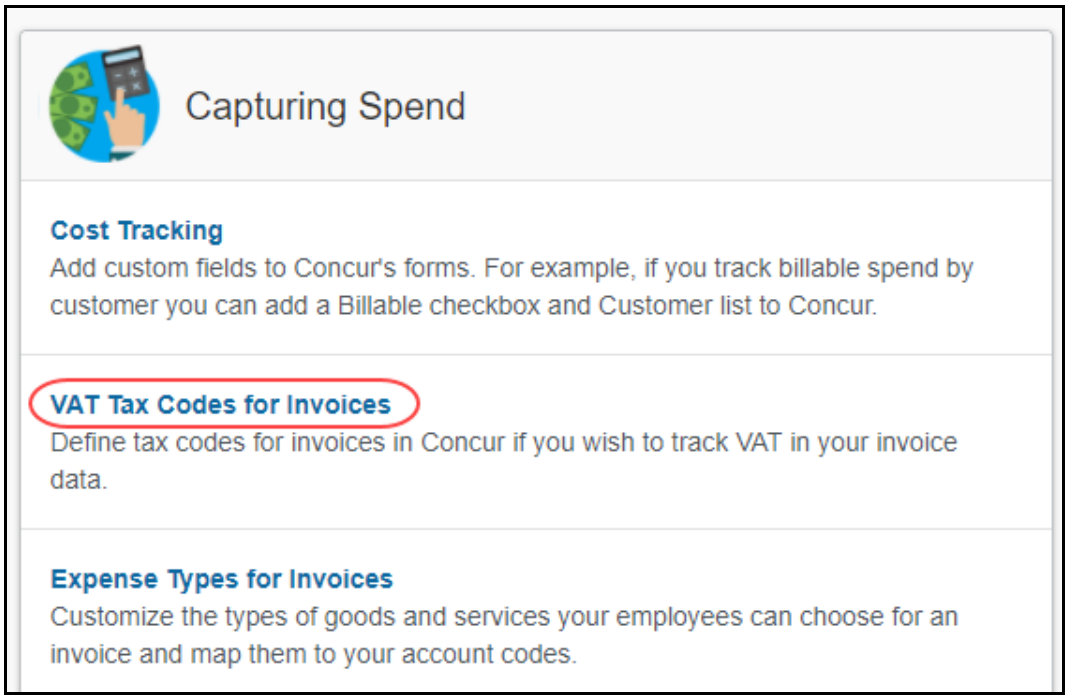
What the User Sees

The user will be able to select tax codes from a list on their payment request.

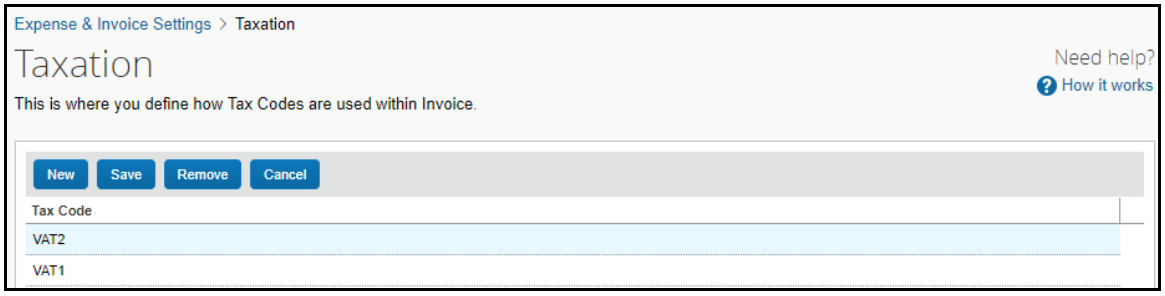


What the Admin Sees

The admin will see a new **VAT Tax Codes for Invoices** link in the **Capturing Spend** section of Product Settings.



Once the **VAT Tax Codes for Invoices** link is clicked, admins will see a new **Taxation** page where they will be able to configure and manage tax codes.



Configuration/Feature Activation

The admin needs to configure the tax codes on a new **Taxation** page in the Administration area of Invoice.

📖 For more information, refer to the *Invoice: Taxation Setup Guide for Concur Standard Edition*.

Spend Categories

Goodwill and Airline Fees Spend Categories Removed

Overview

With this release, Concur has removed the *Goodwill* and *Airline Fees* spend categories on the **Invoice - Expense Types** page, which means that clients will no longer see these options. Instead, clients should use the *Donations* and *Agent/Booking Fees* spend categories.

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

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement cleans up the list of spend categories.

Configuration/Feature Activation

This feature is automatically on. There are no configuration steps.

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

Purchase Requests

Approval and Send Back Email Reminder Link Routes to Purchase Request

Overview

Clients who receive emails about a purchase request pending approval are taken directly to the purchase request in question. If the purchase request has already been processed, clients will now also be taken directly to that purchase request instead of the page listing all purchase requests.

This enhancement also applies to email notifications about purchase requests that have been sent back.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement makes it easier for clients to navigate directly to purchase requests that generated an alert regardless of their status.

Configuration/Feature Activation

This feature is automatically on. There are no configuration steps.

Budget

New Budget Feature in Early Adopter Program

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

Overview

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

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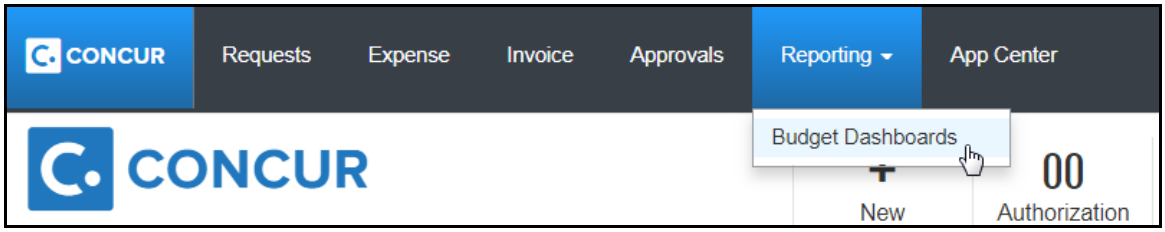
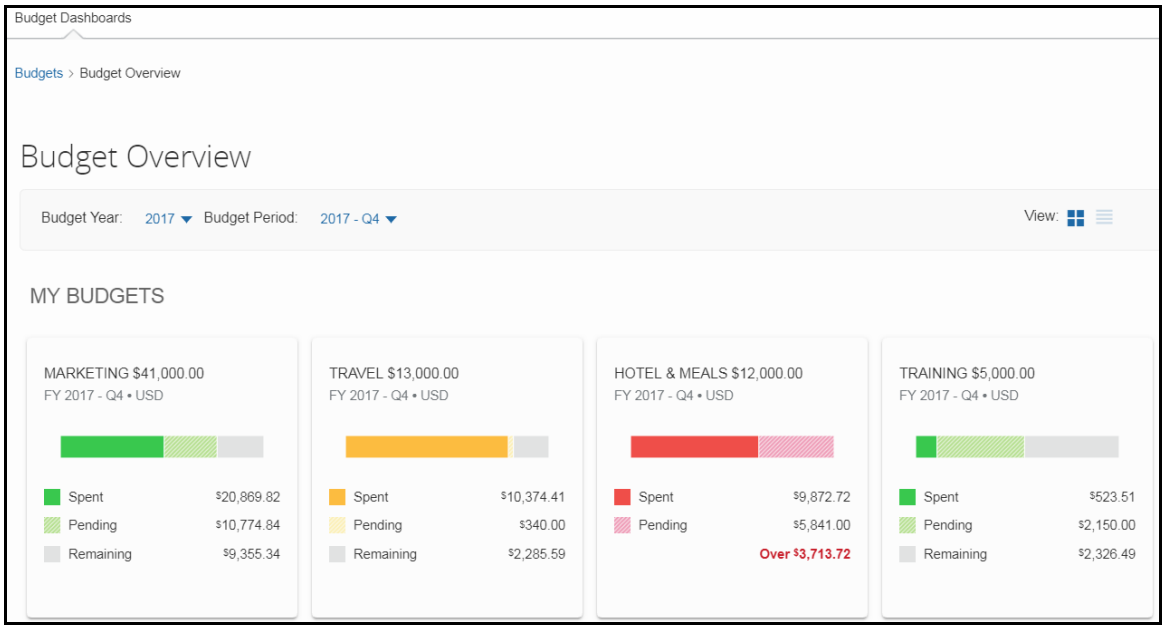


Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



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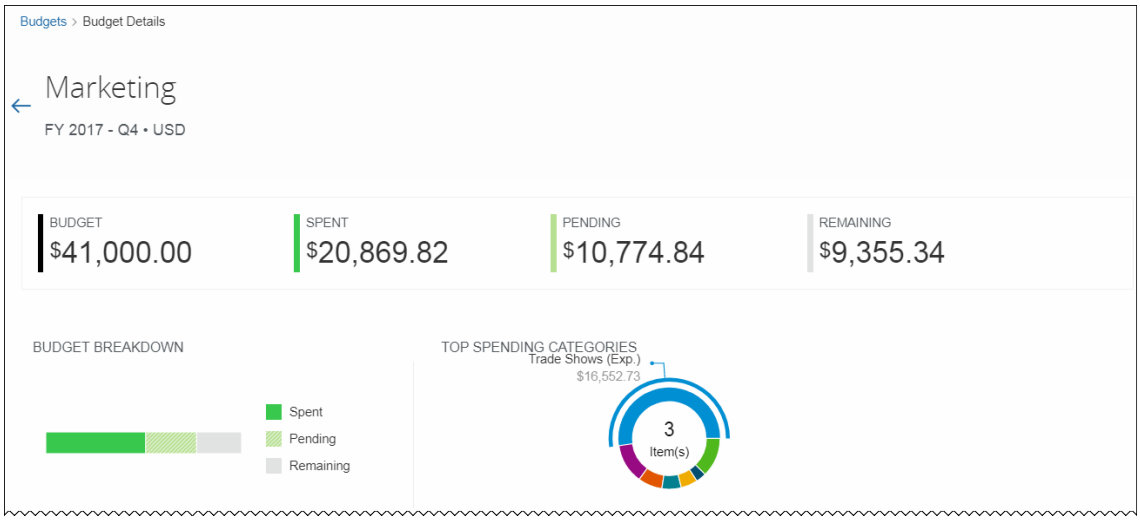
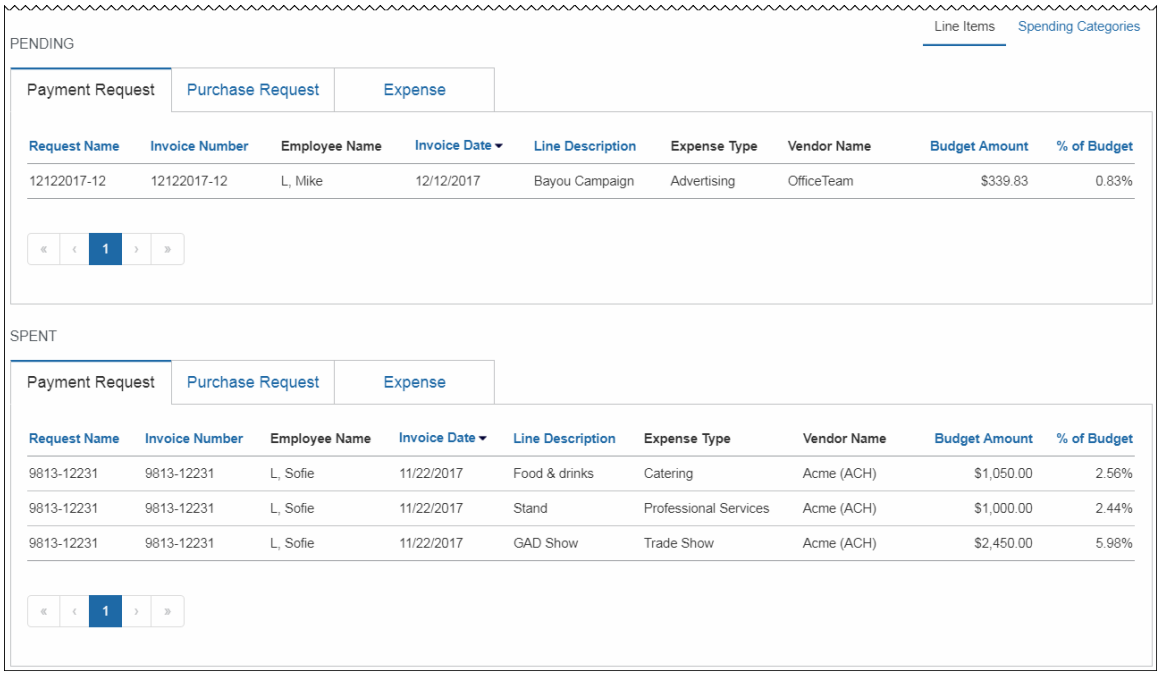
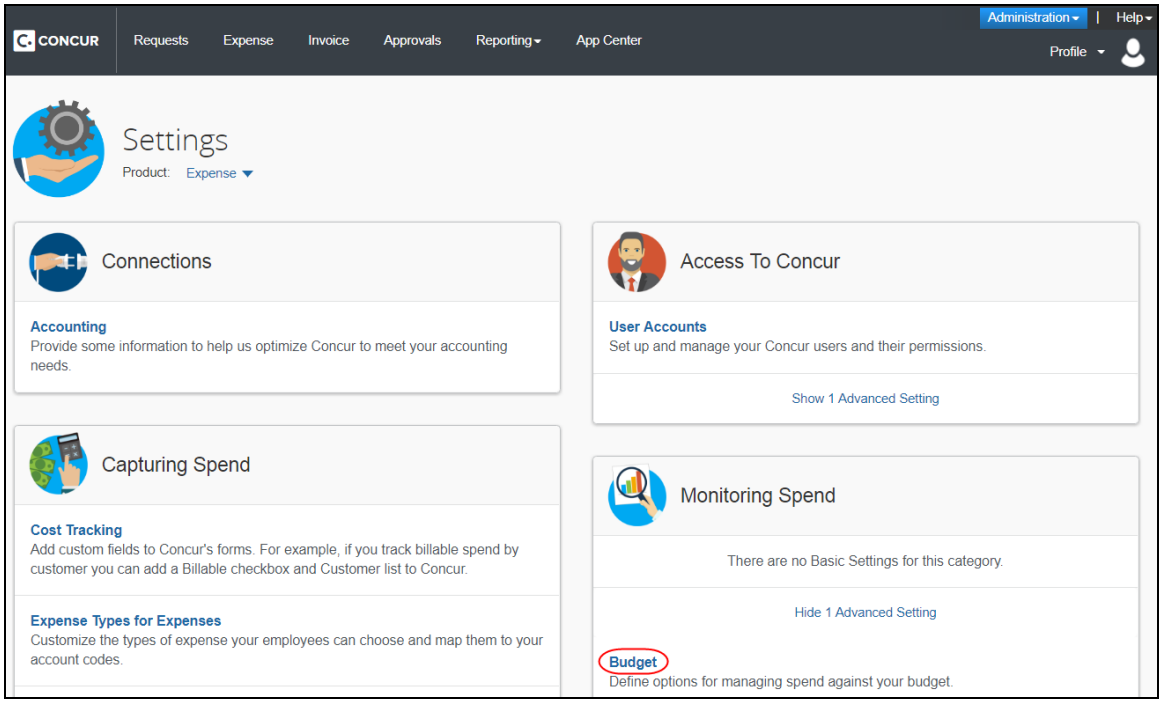




What the Admin Sees

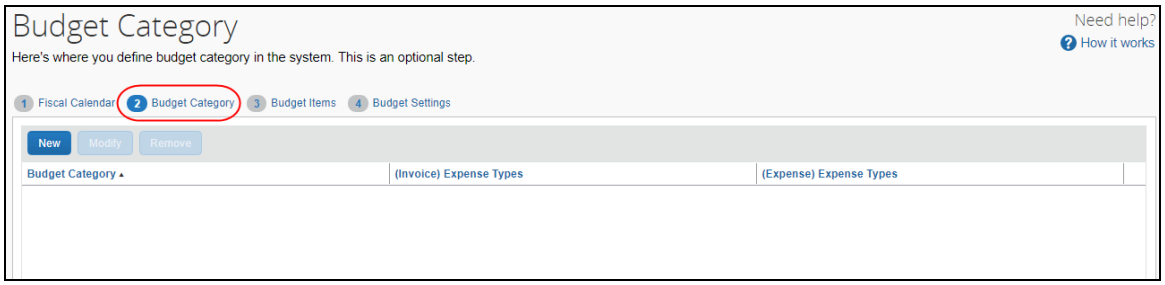
The admin will see a new setting, **Budget**, in the **Monitoring Spend** section in Product Settings.



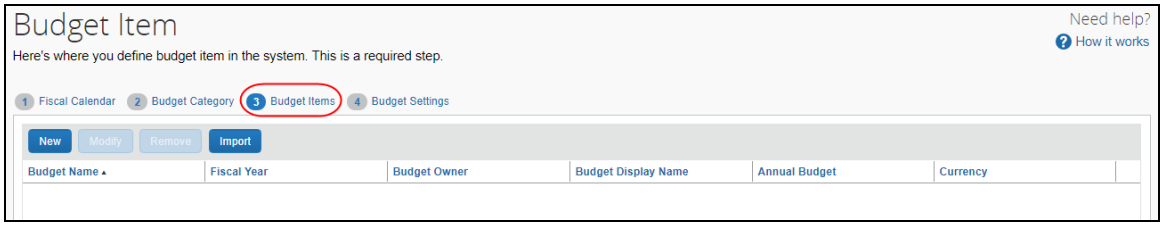
By clicking the **Budget** link, admins will be taken to the configuration pages of Budget.

Fiscal Calendar tab:

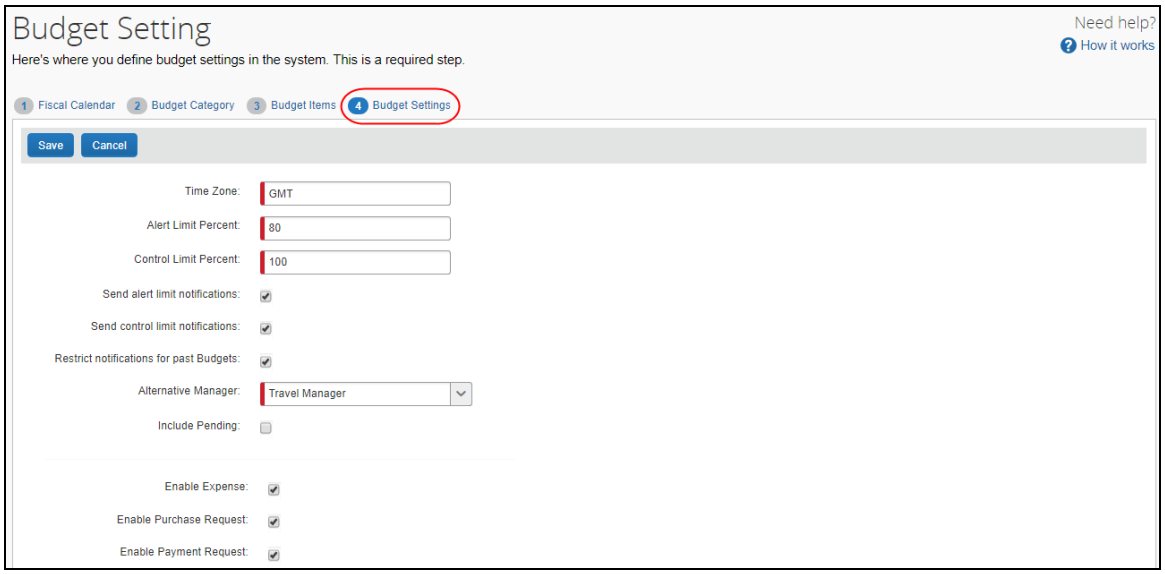
Budget Category tab:



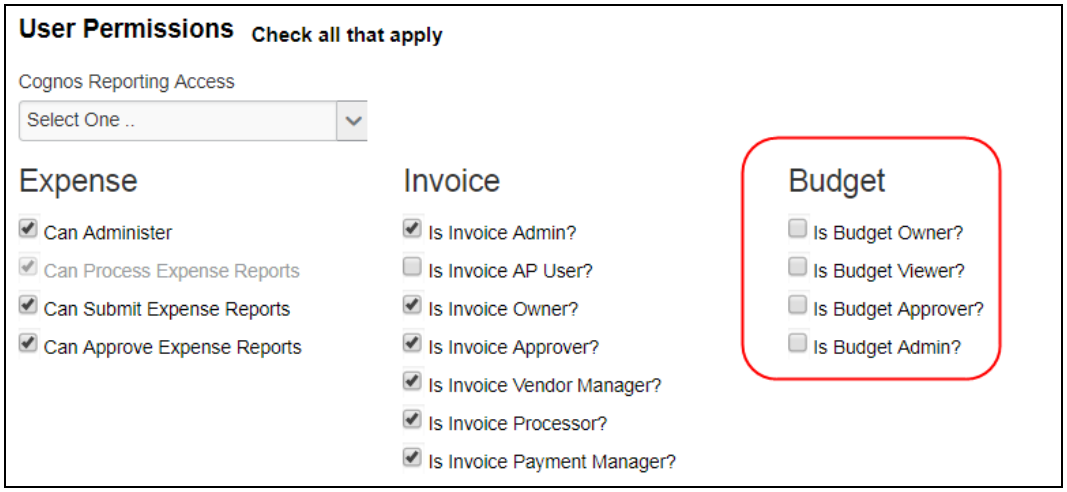
Budget Items tab:



Budget Settings tab:



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



Configuration/Feature Activation

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

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

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

Miscellaneous

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

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

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

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

Next Steps

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

Planned Changes

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

In-Product Messaging

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

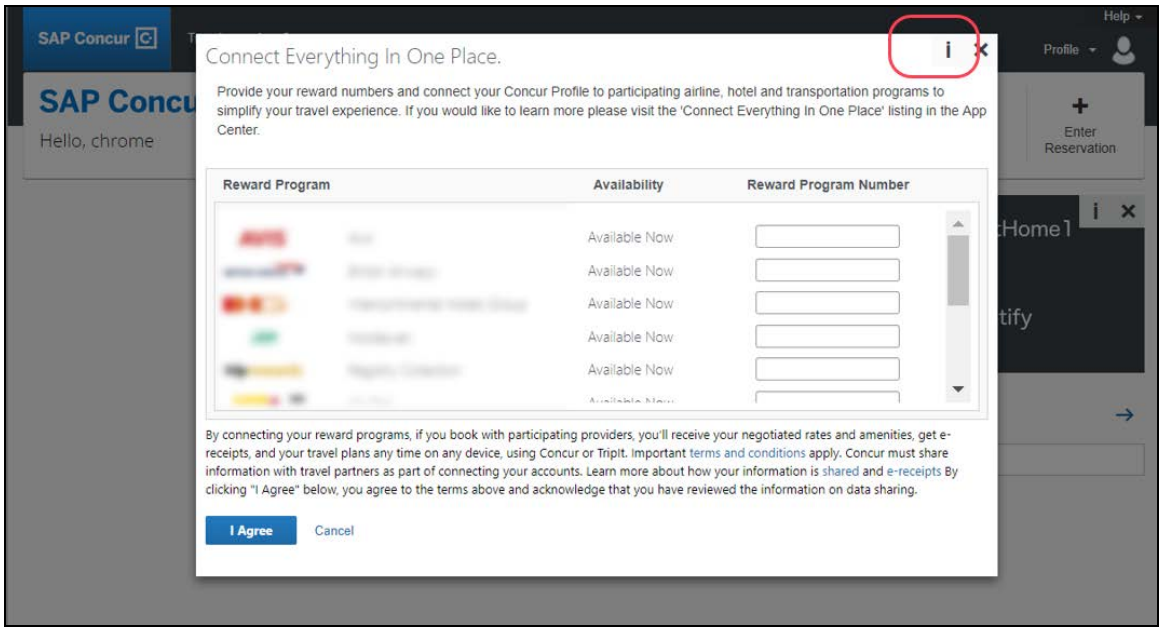
Overview

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

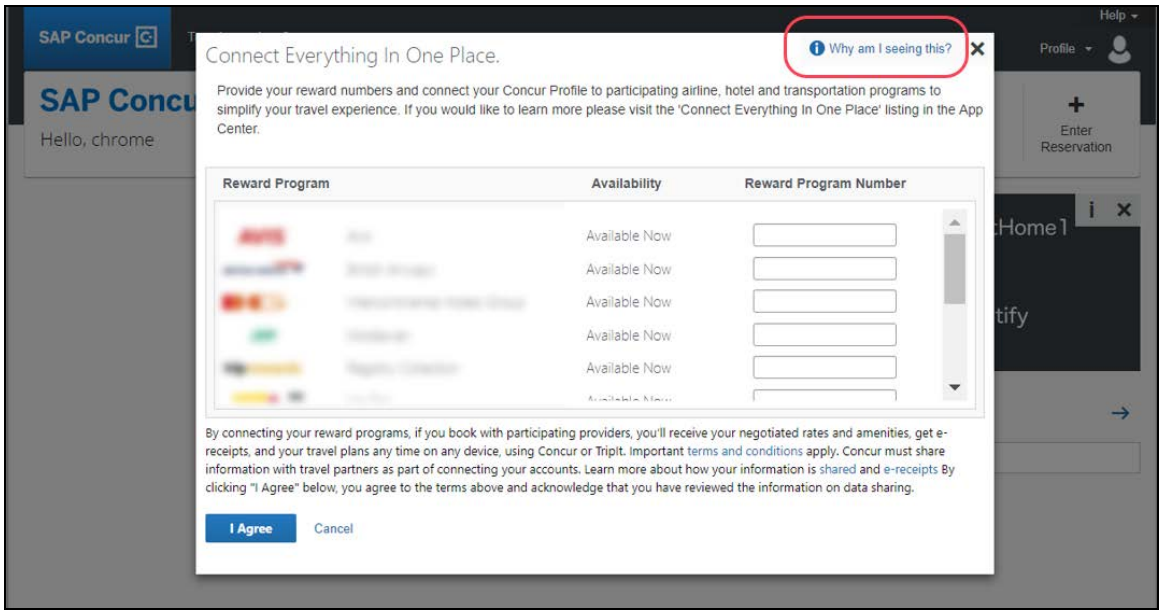
Targeted for the March release, Concur will provide customers in the United States the ability to opt out.

What the User Sees

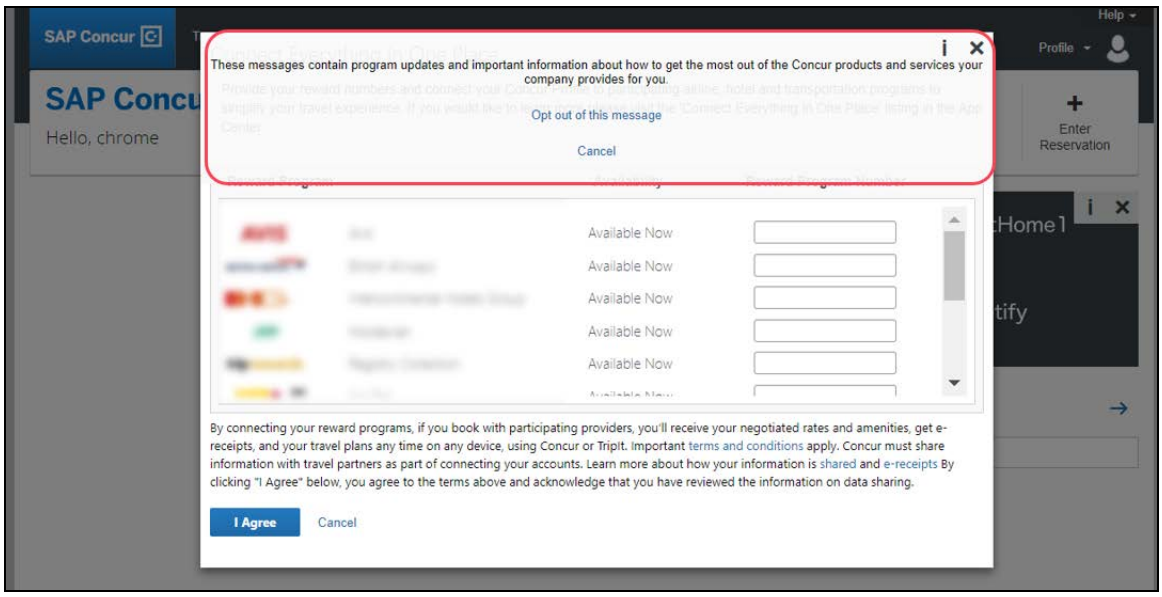
An information icon appears in the upper-right corner of the message.



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



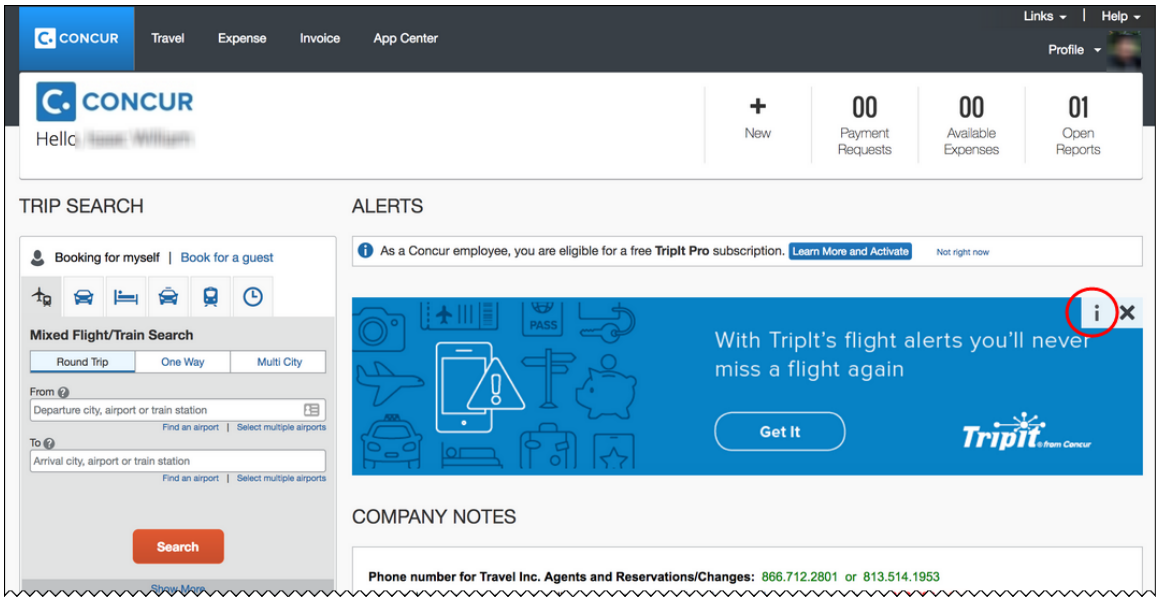
When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other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



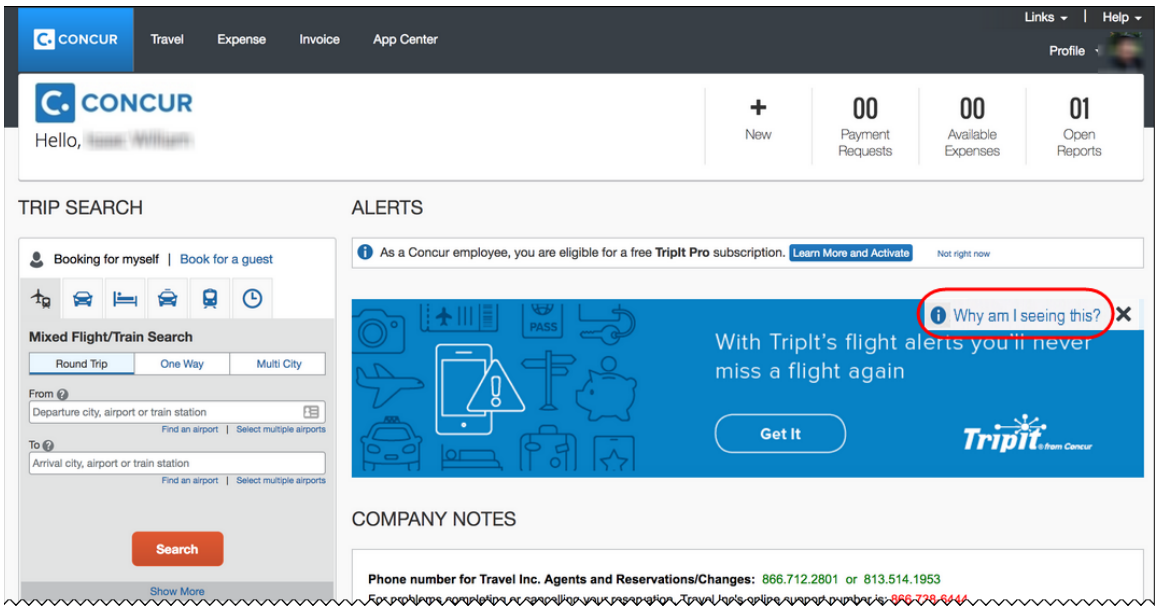
When the user clicks the close button (X in the upper-right corner), the window closes.

In-Page Messages

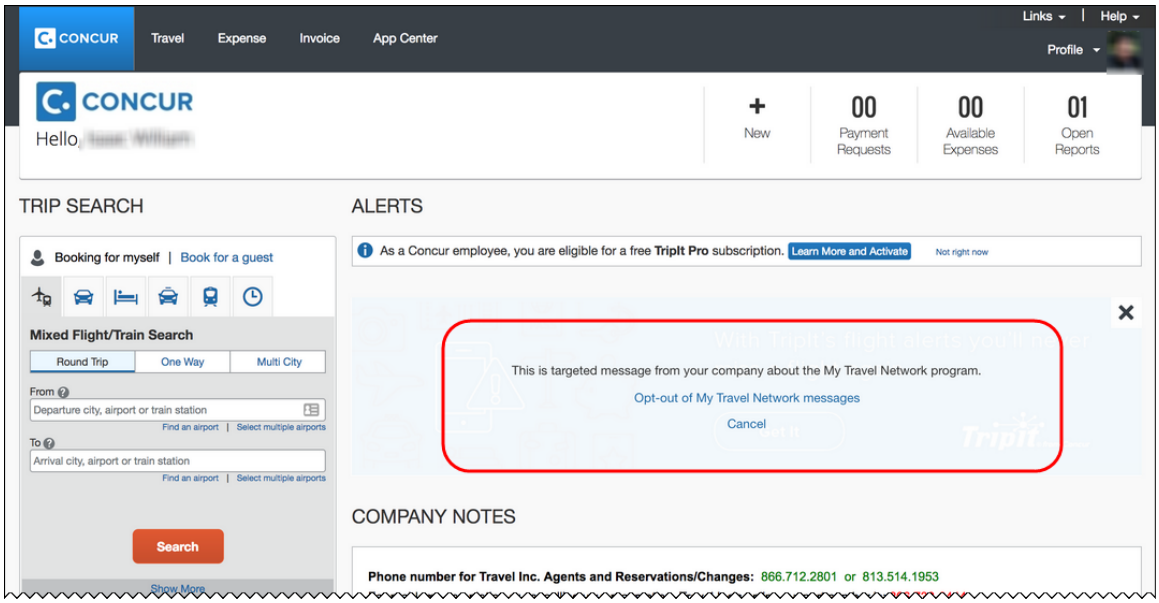
An information icon appears in the upper-right corner of the message.



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



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



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

Configuration/Feature Activation

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

Data Retention

Planned Change New Feature for Outdated Data

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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

Configuration/Feature Activation

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

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

Text FTP

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

Overview

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

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

What This Means – The Client Experience

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

Configuration/Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

Invoice

Planned Change Check for Missing Account Code Later in Workflow

Overview

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

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

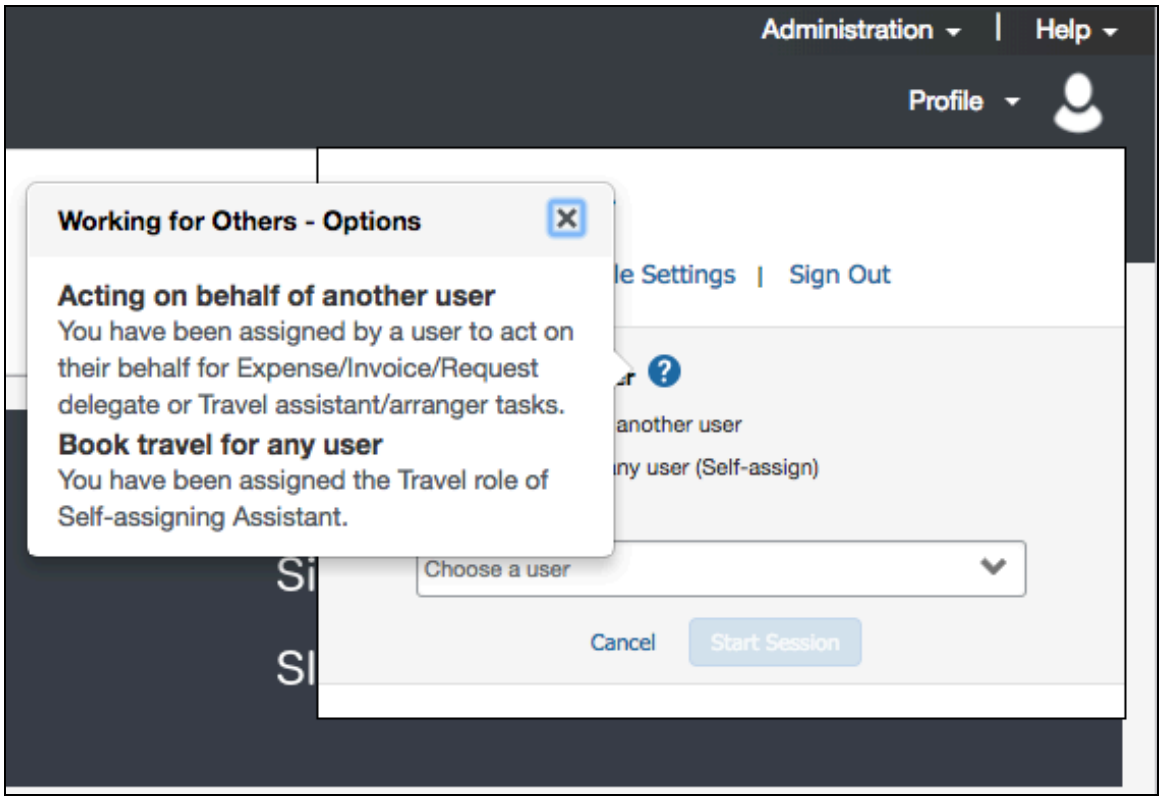
The feature is automatically on; there are no additional configuration or activation steps.

Accessibility

Planned Change Accessibility: Keyboard Access for Working for Others Quick Help

Overview

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



BUSINESS PURPOSE/CUSTOMER BENEFIT

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

What the User Sees

There is no visual change for the user.

Configuration/Feature Activation

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

Planned Change Accessibility: Alternative Text for the Logo on the Sign In Page

Overview

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

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

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

BUSINESS PURPOSE/CUSTOMER BENEFIT

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

What the User Sees

There is no visual change for the user.

Configuration/Feature Activation

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

Planned Change Accessibility: Remove All Instances of 'ConcurAccessible'

Overview

ConcurAccessible is a feature that provides certain accessibility features. However, with the many accessibility enhancements we have been making, ConcurAccessible

has become obsolete and is no longer used. In addition, it can create inconsistent UI behavior for users. Therefore, with the March release, all ConcurAccessible components will be removed from Concur.

BUSINESS PURPOSE/CUSTOMER BENEFIT

This ensures a consistent, better experience for all users.

What the User Sees

There is no visual change for the user.

Configuration/Feature Activation

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

Client Notifications

Subprocessors

Concur Non-Affiliated Subprocessors Notice

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

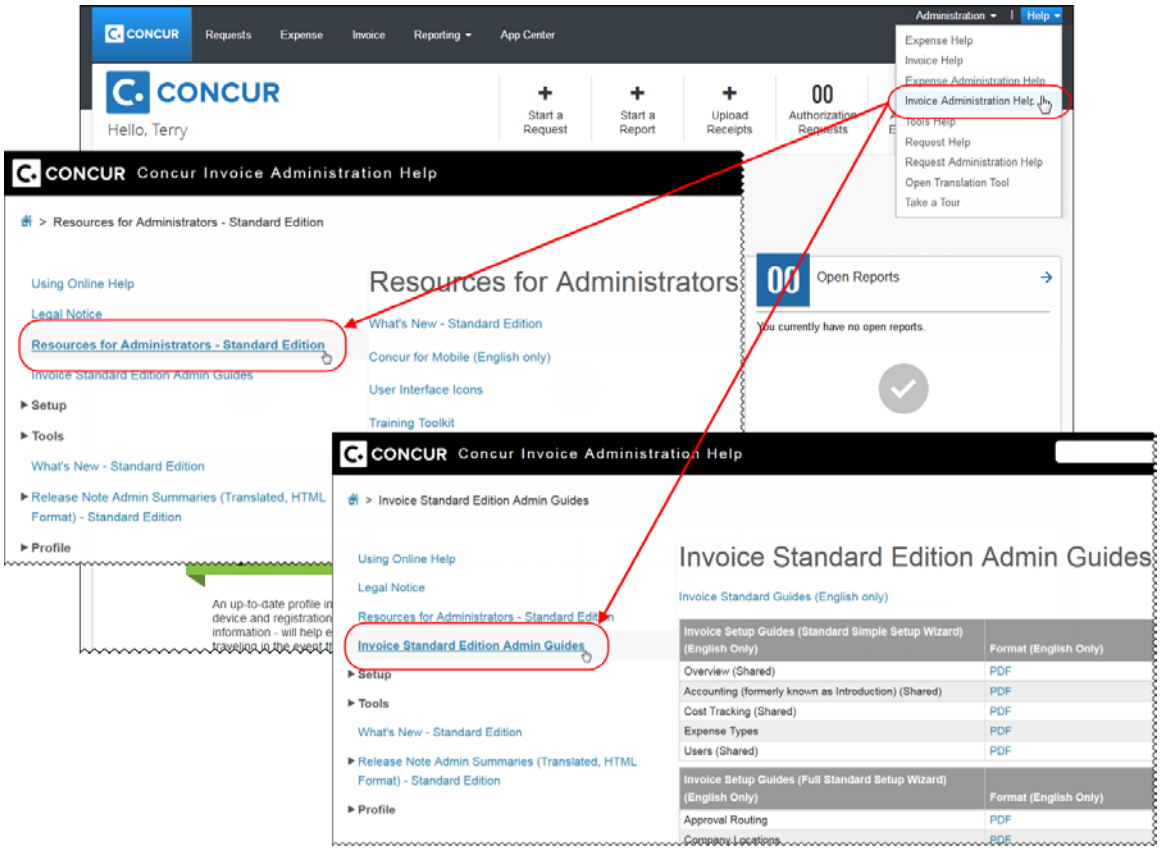
The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

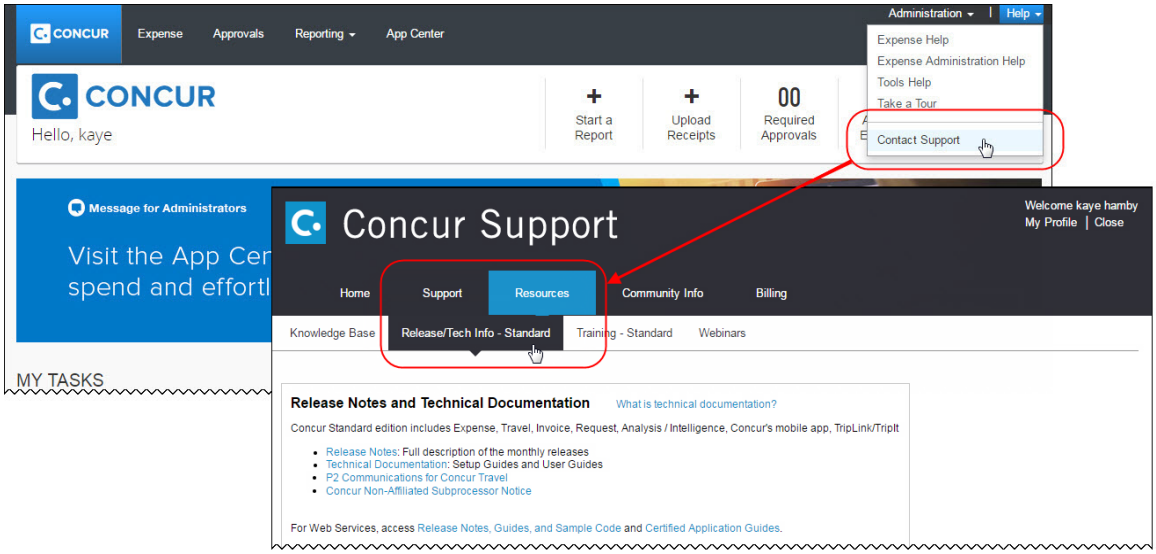
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.



Concur Support Portal – Selected Users

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

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


CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Expense Help
Expense Administration Help
Tools Help
Take a Tour
Contact Support
CONCUR
Hello, kaye
Start a Report
Upload Receipts
00
Required Approvals
Message for Administrators
Visit the App Cer
spend and effortl
MY TASKS
Concur Support
Welcome kaye hamby
My Profile | Close
Home
Support
Resources
Community Info
Billing
Knowledge Base
Release/Tech Info - Standard
Training - Standard
Webinars
Release Notes and Technical Documentation
What is technical documentation?
Concur Standard edition includes Expense, Travel, Invoice, Request, Analysis / Intelligence, Concur's mobile app, TripLink/TripIt
Release Notes: Full description of the monthly releases
Technical Documentation: Setup Guides and User Guides
P2 Communications for Concur Travel
Concur Non-Affiliated Subprocessor Notice
For Web Services, access Release Notes, Guides, and Sample Code and Certified Application Guides.

Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: March 17, 2018 Update #1: Monday, March 19, 1:00 PM PT	Client – FINAL

Contents

Release Notes

This document contains the release notes for the Invoice functionality for Concur Standard edition.

Purchase Requests

No Validation Check on Need by Date on Purchase Request Line Items

Overview

Previously, if clients had, for example, three line items on a purchase request for the same vendor, and one of the dates was different, they would receive a message stating all three dates need to be the same and then the system would change the dates so that the Need by Date was the same for all line items. With this release, the dates can be different and no message will be generated.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement makes it easier for clients to process purchase requests by allowing them to have different dates on the line items of the purchase request.

Configuration/Feature Activation

This feature is automatically on. There are no configuration steps.

Add Ship-to and Bill-to Addresses on PO Change Order When Address Deleted on Original PO

Overview

Previously, clients could not change a ship-to or bill-to address on a PO Change Order when the ship-to and bill-to addresses on the original purchase order were deleted. With this release, when clients want to create a PO Change Order on a transmitted purchase order and the ship-to or bill-to address is deleted, they can now add an address.

Clients will still receive a message when they try to submit the PO Change Order, if the ship-to or bill-to address has been deleted on the original purchase order. However, once they have added an address, the PO Change Order can be submitted.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement makes it easier for clients to create PO Changes Orders by making the ship-to and bill-to addresses editable.

Configuration/Feature Activation

This feature is automatically on. There are no configuration steps.

📖 For more information, refer to the *Invoice: Purchase Request and Purchase Order User Guide for Concur Standard Edition*.

Budget

New Budget Feature Generally Available March 19, 2018

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

Overview

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

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

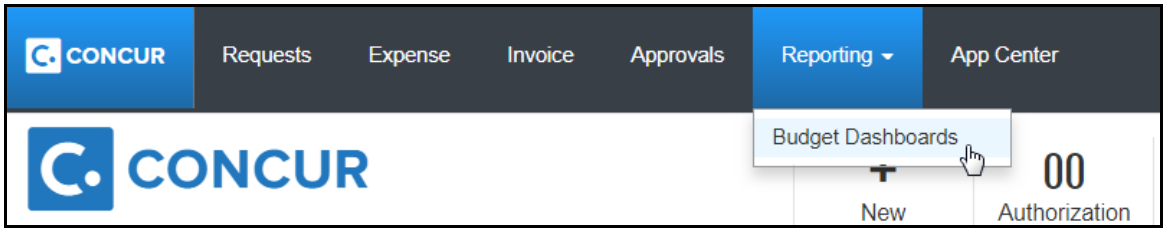
In addition, the Budget feature is available for the Concur mobile app for Invoice. Please note that the release for the Concur mobile app occurs seven to ten days after the regular release.

BUSINESS PURPOSE/CLIENT BENEFIT

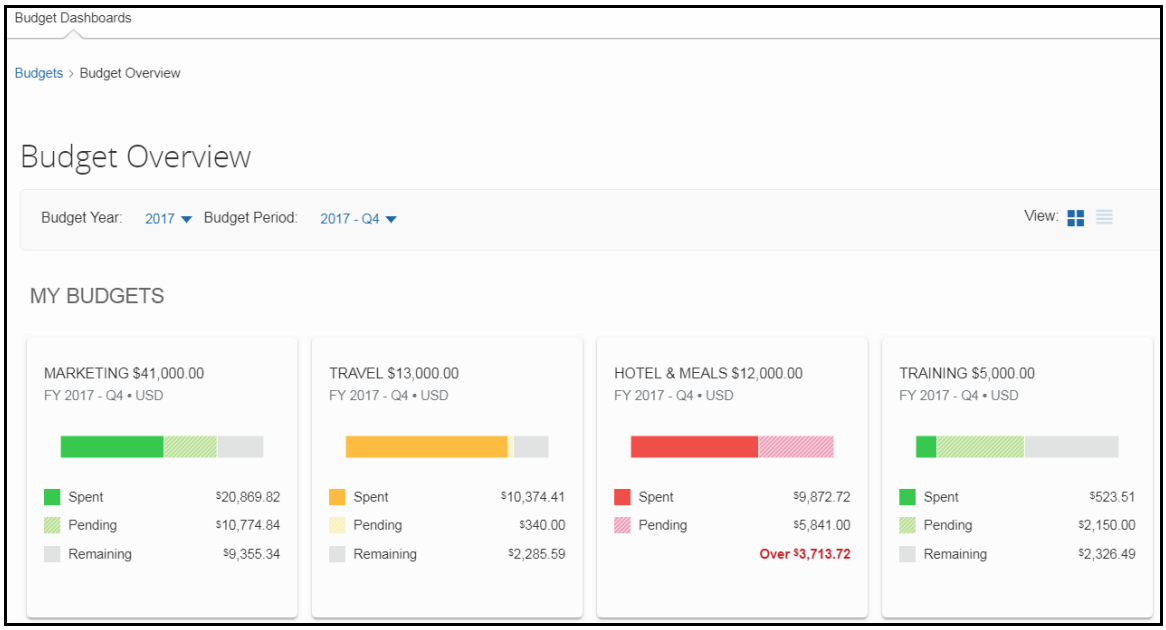
This feature makes budgets visible, actionable, and real-time for approvers and budget owners, leading to high-quality spending decisions for Invoice (payment requests and purchase requests) clients.

What the User Sees

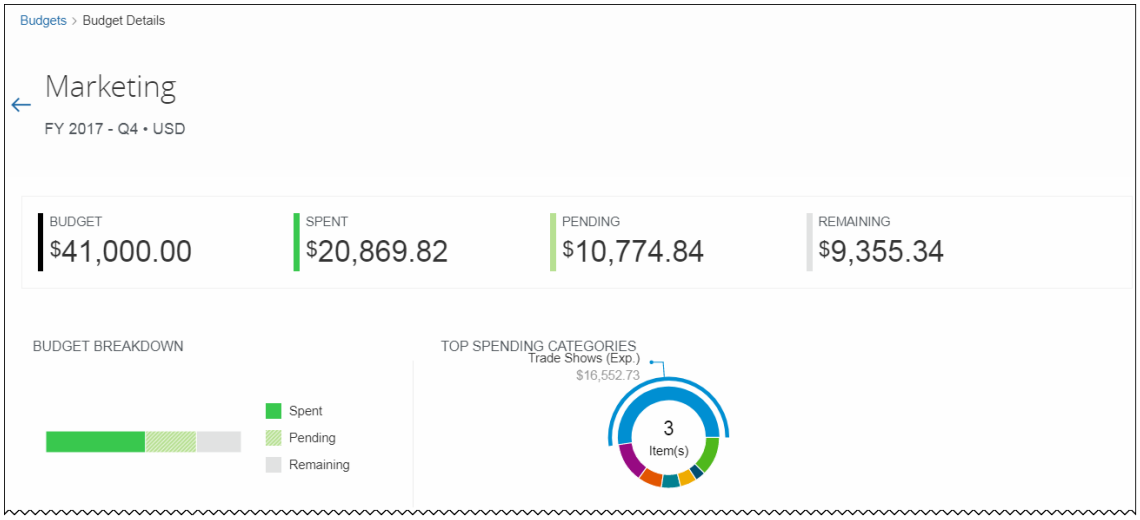
The user will see a new menu option, **Budget Dashboards**, in the **Reporting** menu.

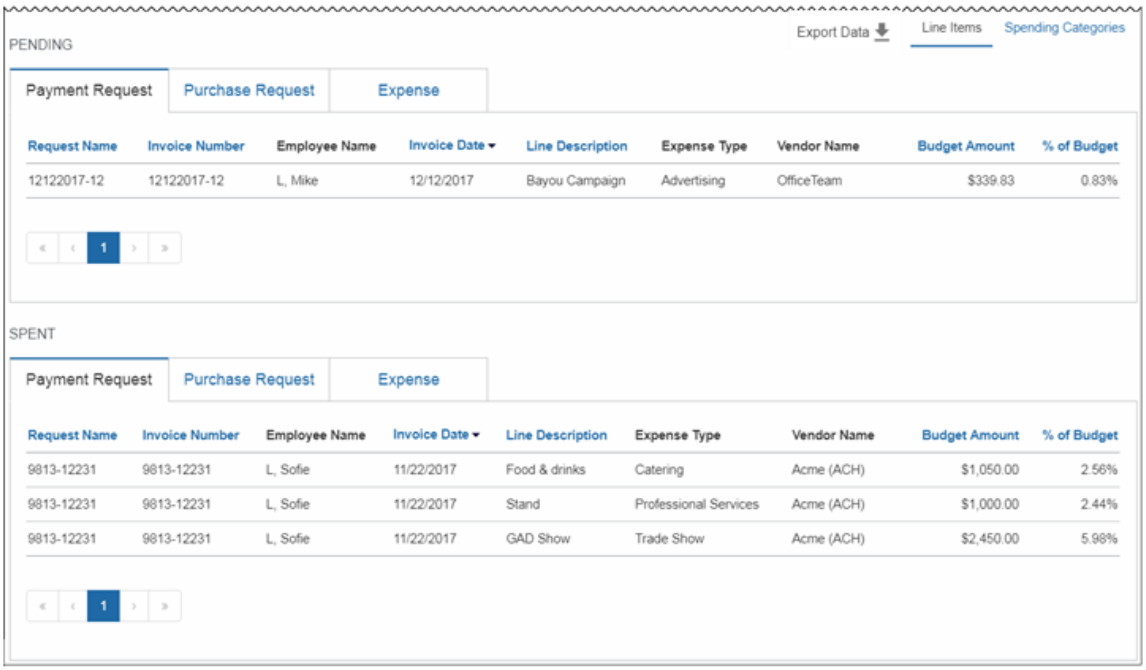


Once the user clicks the **Budget Dashboard** menu option, they will see a **Budget Overview** page.



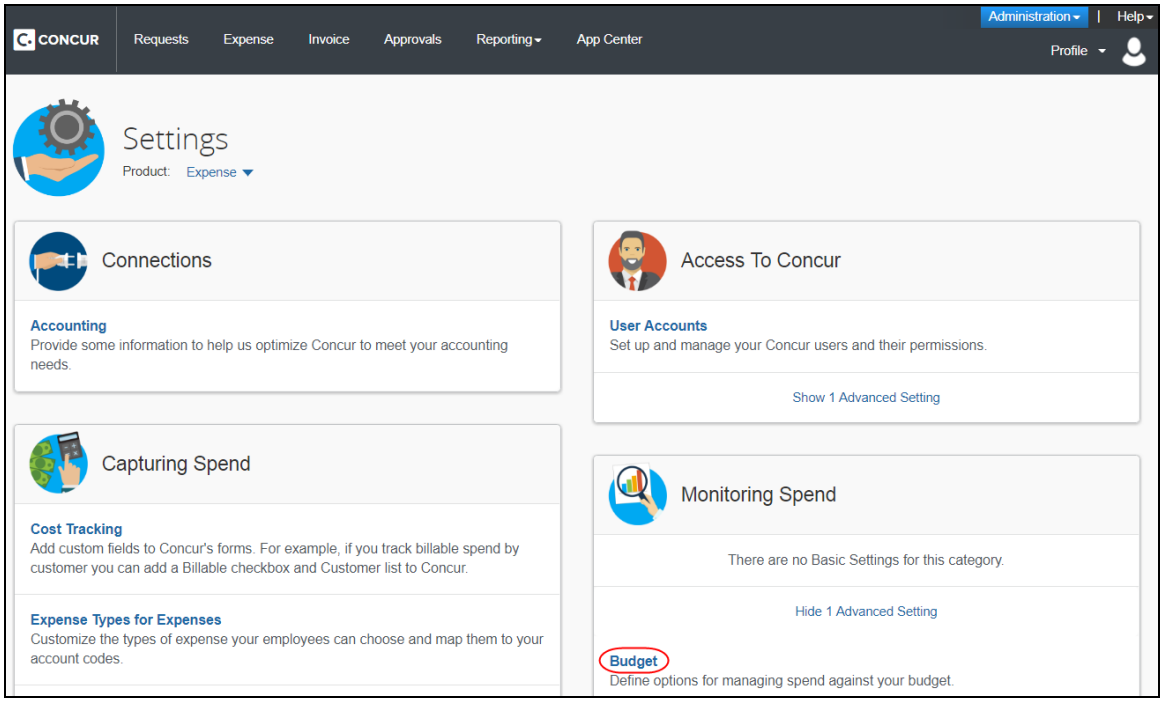
Clicking on one of the budgets will show details about that budget.





What the Admin Sees

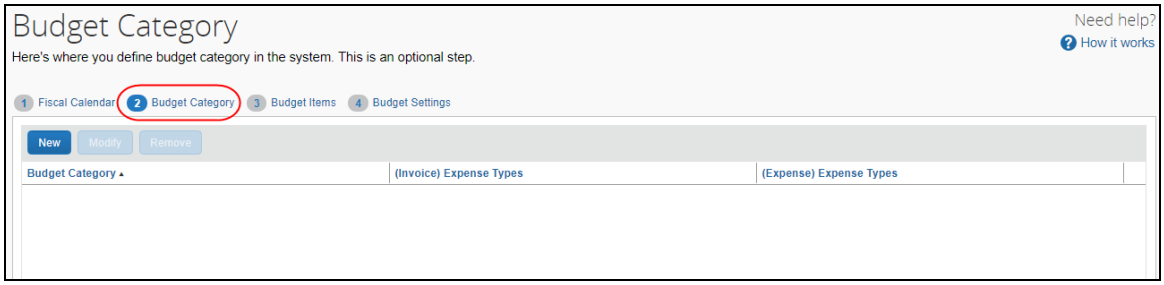
The admin will see a new setting, **Budget**, in the **Monitoring Spend** section in Product Settings.



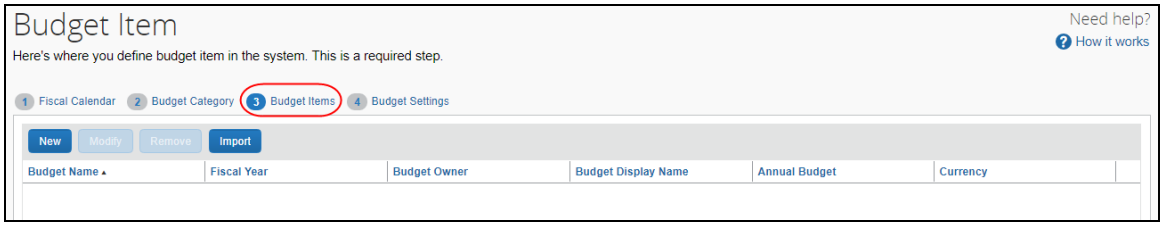
By clicking the **Budget** link, admins will be taken to the configuration pages of Budget.

Fiscal Calendar tab:

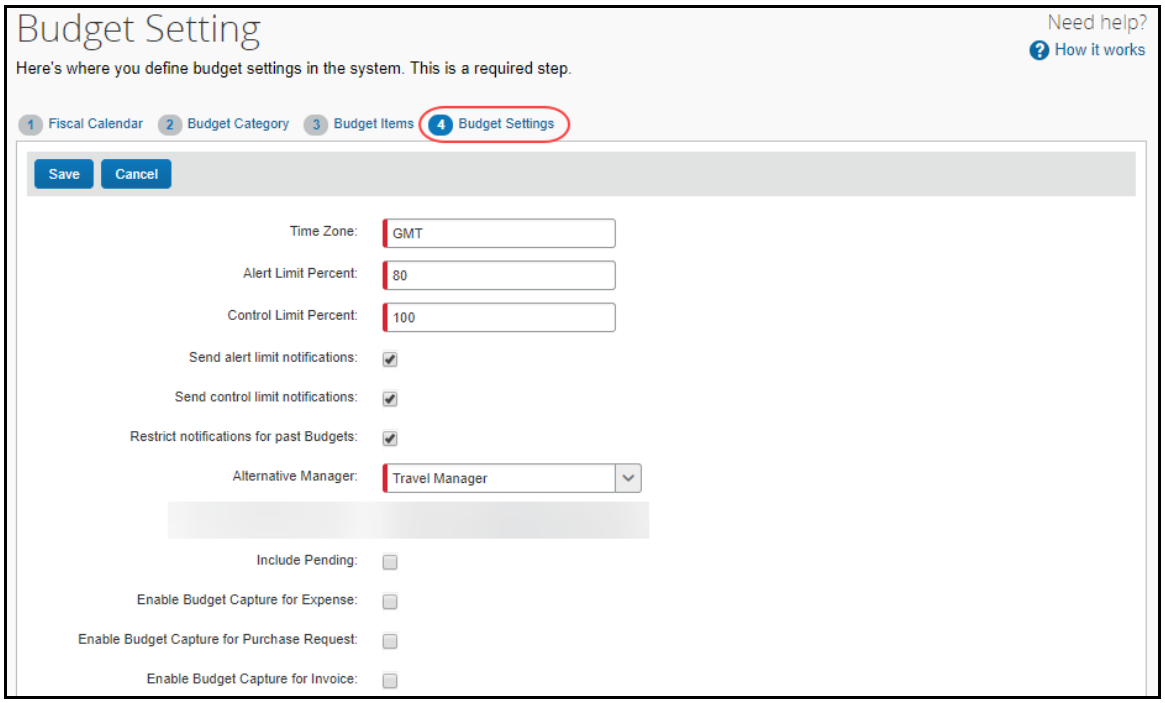
Budget Category tab:



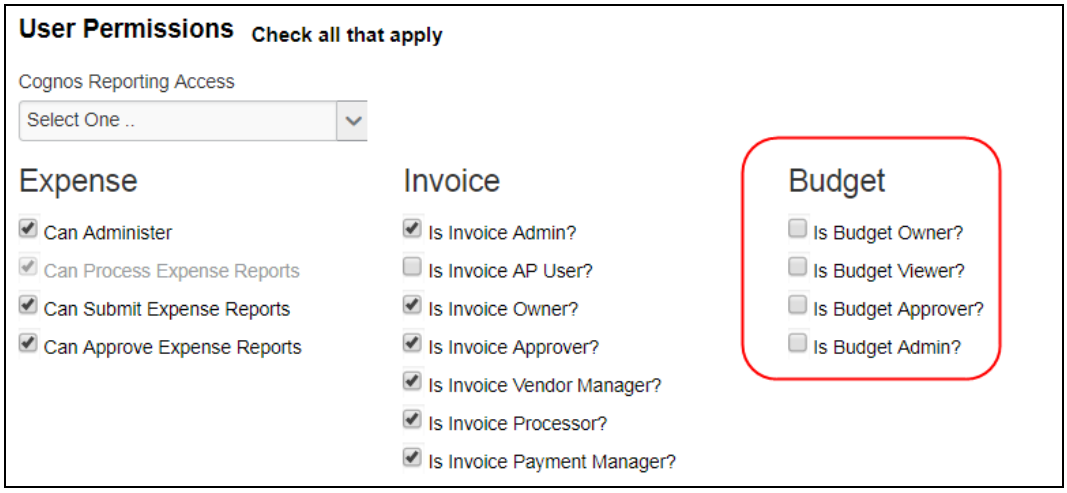
Budget Items tab:



Budget Settings tab:



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



Configuration/Feature Activation

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

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

Invoice

Check for Missing Account Code Later in Workflow

Overview

Previously, employees could not submit a payment request if one or more account codes were missing for expenses in a payment request. With this release, employees can now submit and approve a payment request even if one or more account codes are missing for expenses in the payment request.

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

However, the system will block the data from being extracted or posted to your financial system until your Concur company administrator provides an account code mapping for the expense type in Product Settings.

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

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

Miscellaneous

Reminder: No Personal or Sensitive Data in Custom Fields

Overview

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

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

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

Next Steps

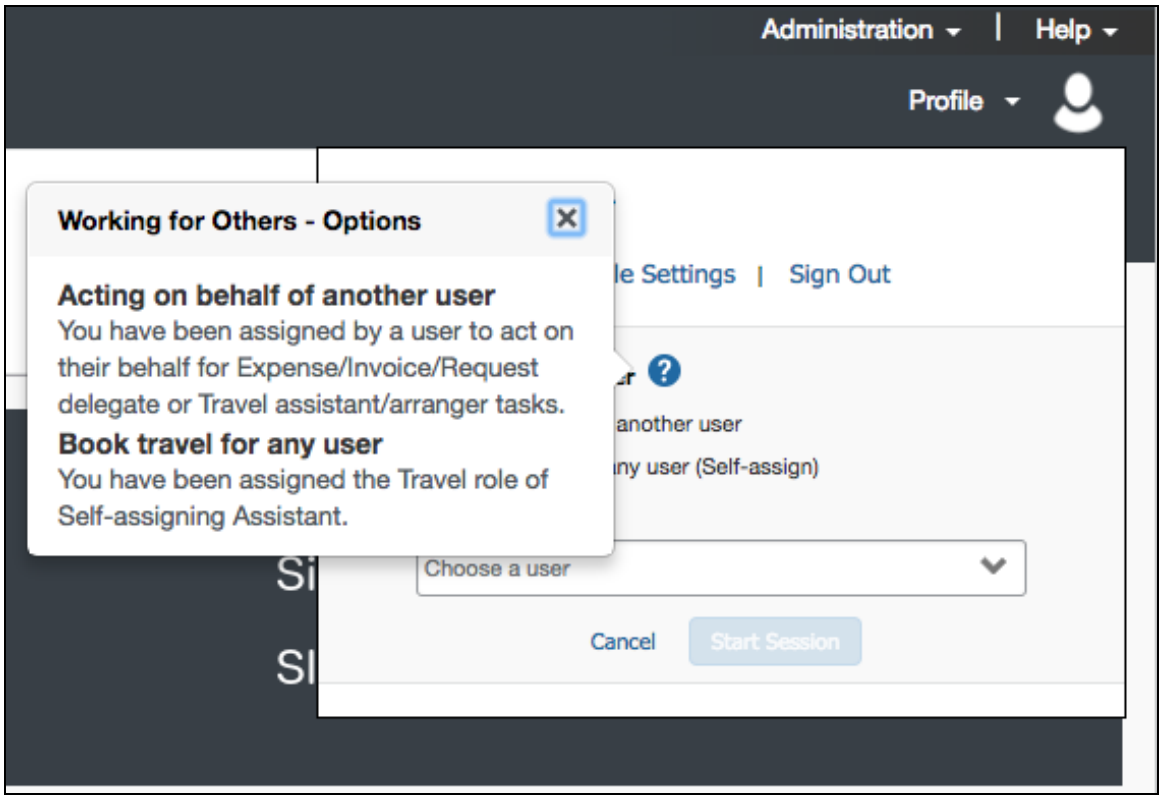
For information about your configuration and the use of custom fields, contact Concur Support or your Account Manager.

Accessibility

Accessibility: Keyboard Access for Working for Others Quick Help

Overview

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



BUSINESS PURPOSE/CUSTOMER BENEFIT

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

What the User Sees

There is no visual change for the user.

Configuration/Feature Activation

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

Accessibility: Alternative Text for the Logo on the Sign-In Page

Overview

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

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

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

BUSINESS PURPOSE/CUSTOMER BENEFIT

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

What the User Sees

There is no visual change for the user.

Configuration/Feature Activation

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

Users by Browser

Users by Browser Report Updated

Overview

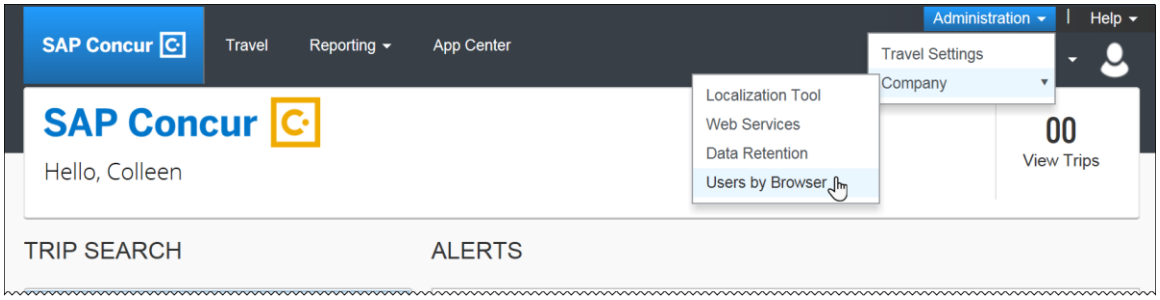
The Users by Browser report has been updated to include more information – all in one place. The report now lists all users as well as their browsers and login count.

BUSINESS PURPOSE/CLIENT BENEFIT

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

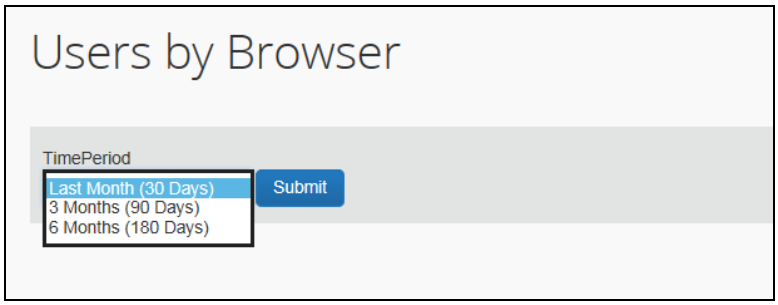
What the Admin Sees

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

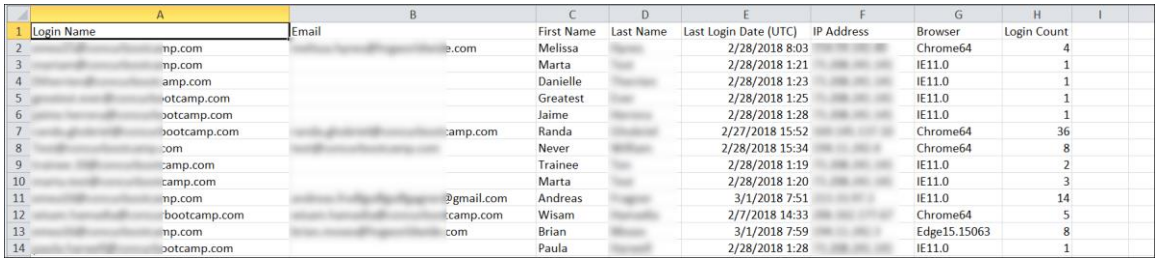


The **Users by Browser** page appears.

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



The report is generated in CSV format.



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

Configuration/Feature Activation

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

Planned Changes

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

In-Product Messaging

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

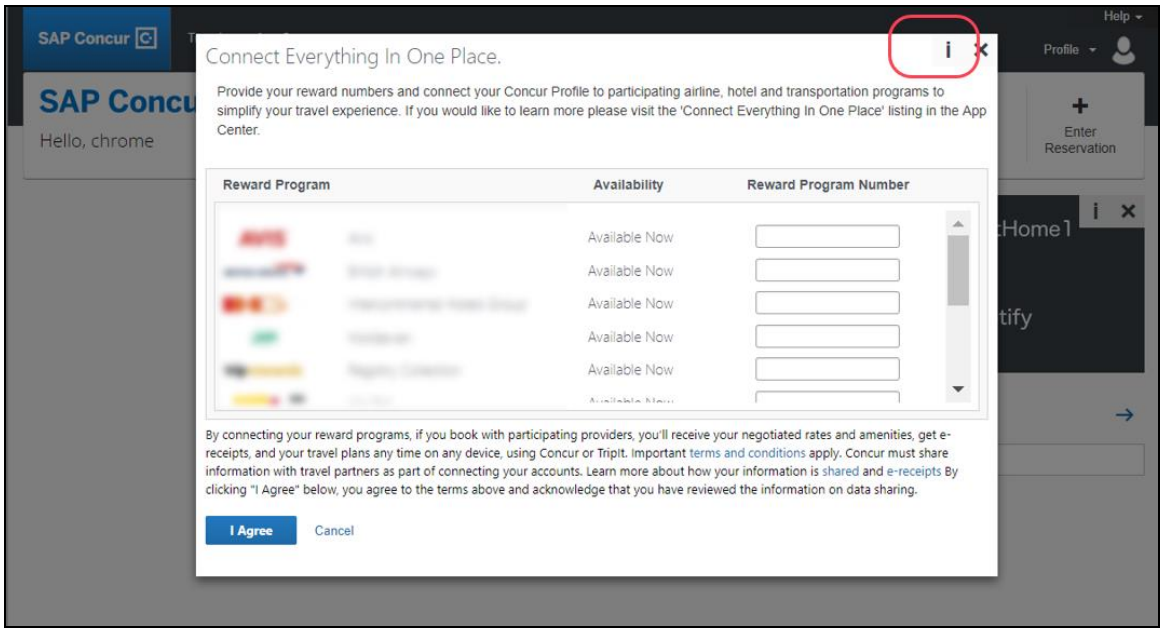
Overview

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

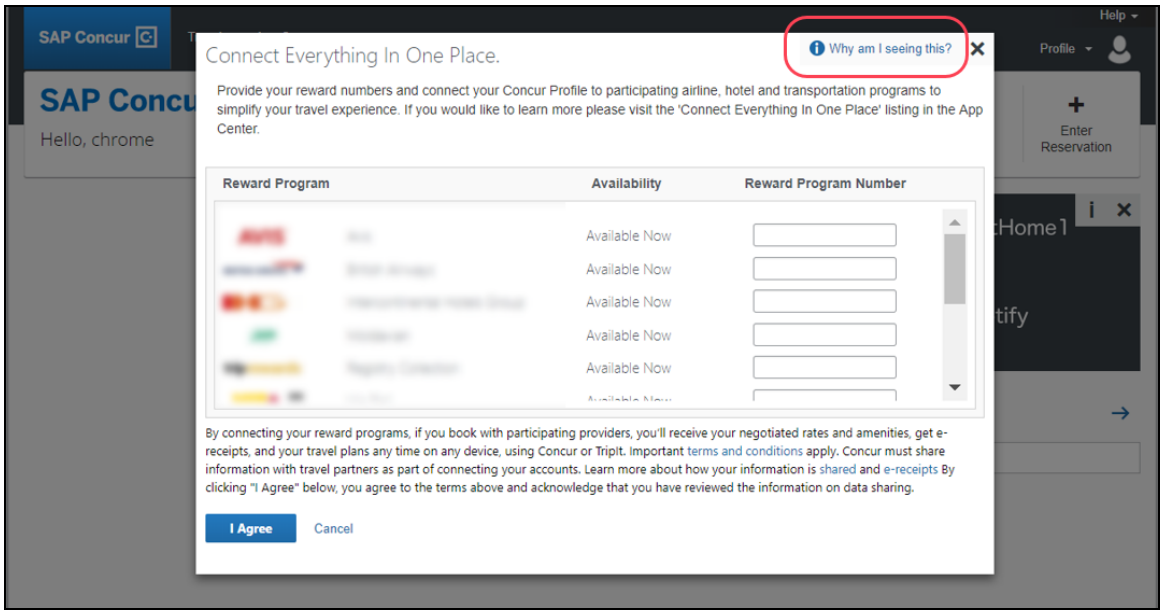
In a future release, Concur will provide customers in the United States the ability to opt out.

What the User Sees

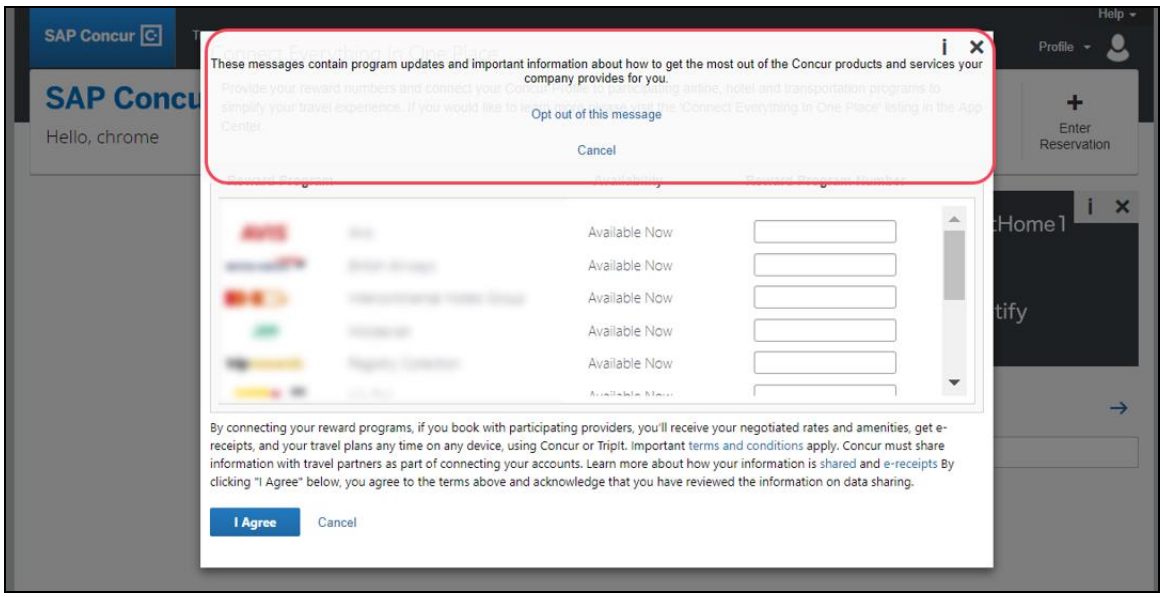
An information icon appears in the upper-right corner of the message.



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



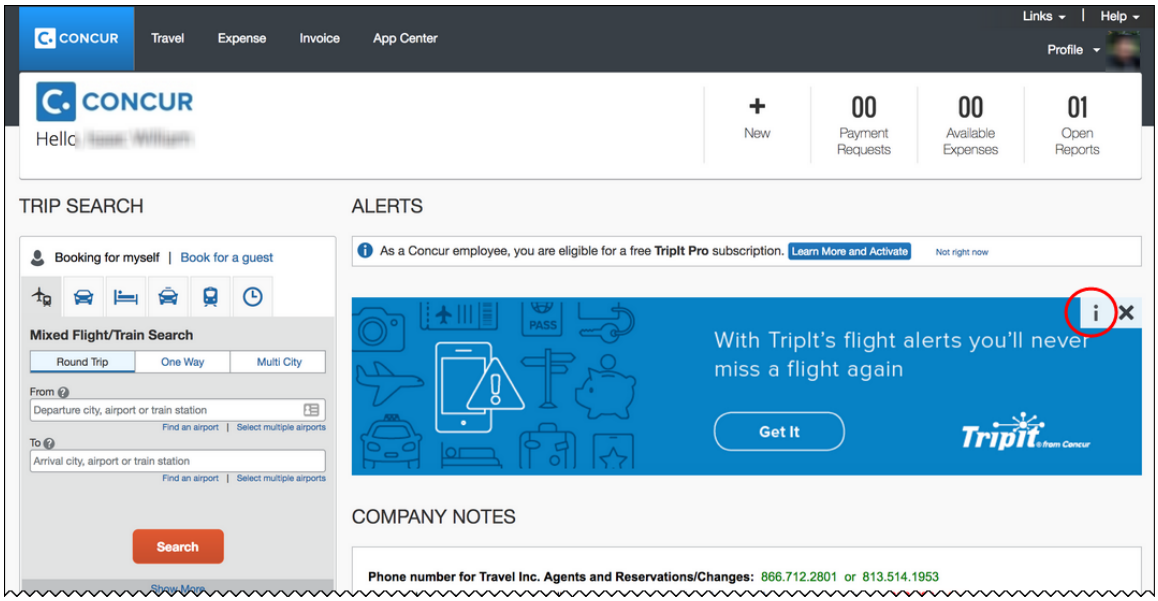
When the user clicks *Why am I seeing this?*, the area expands to provide information about why the user is seeing this particular message as well as a link for the user to click to opt out of seeing similar messages in the future. After opting out, the user could still be shown IPM relating to other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



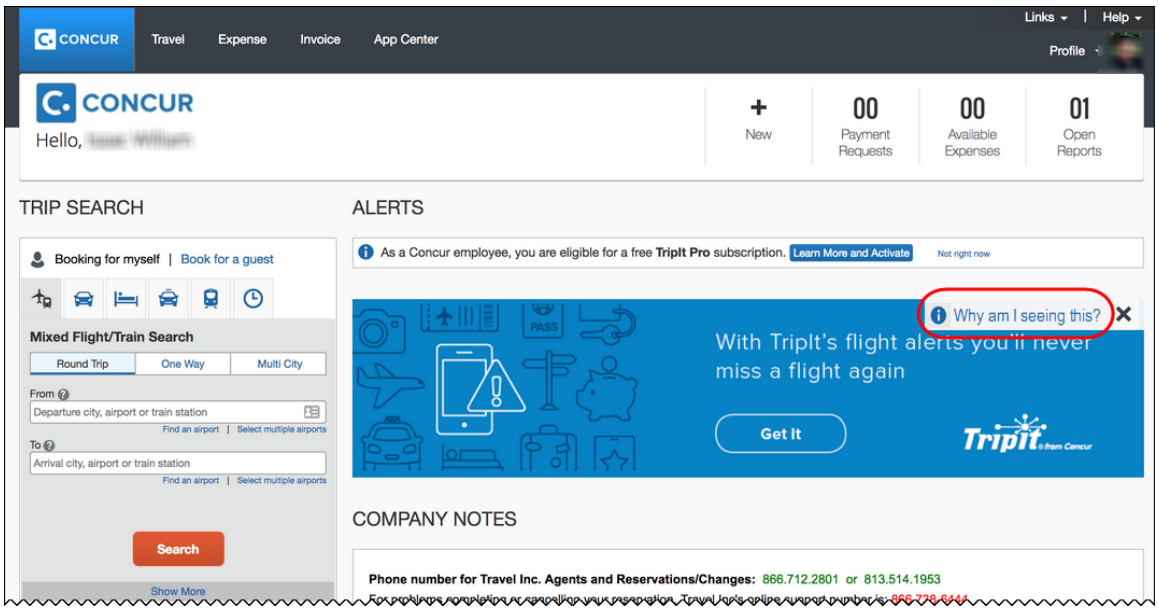
When the user clicks the close button (X in the upper-right corner), the window closes.

In-Page Messages

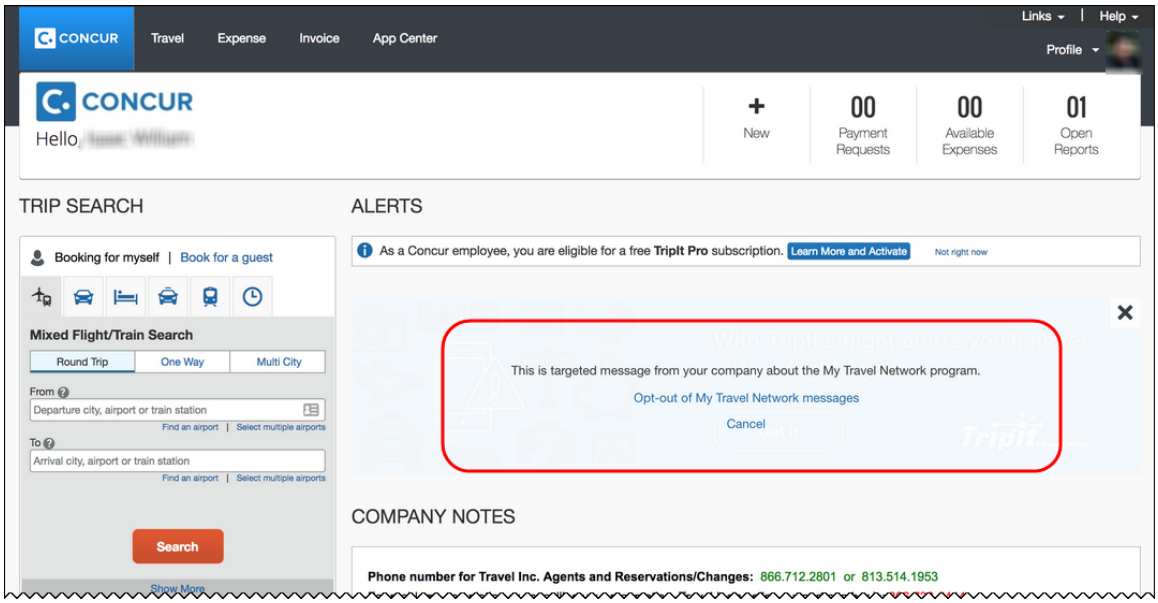
An information icon appears in the upper-right corner of the message.



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



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



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

Configuration/Feature Activation

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

Data Retention

Planned Change New Feature for Outdated Data

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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

Configuration/Feature Activation

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

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

Text FTP

Planned Change Support for Plain Text FTP to End May 15, 2018

Overview

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

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

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

What This Means – The Client Experience

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

Configuration/Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

Accessibility

Planned Change Accessibility: Remove All Instances of 'ConcurAccessible'

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

Client Notifications

Subprocessors

Concur Non-Affiliated Subprocessors Notice

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

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

Browser Certifications

Monthly Browser Certifications and Support Configurations

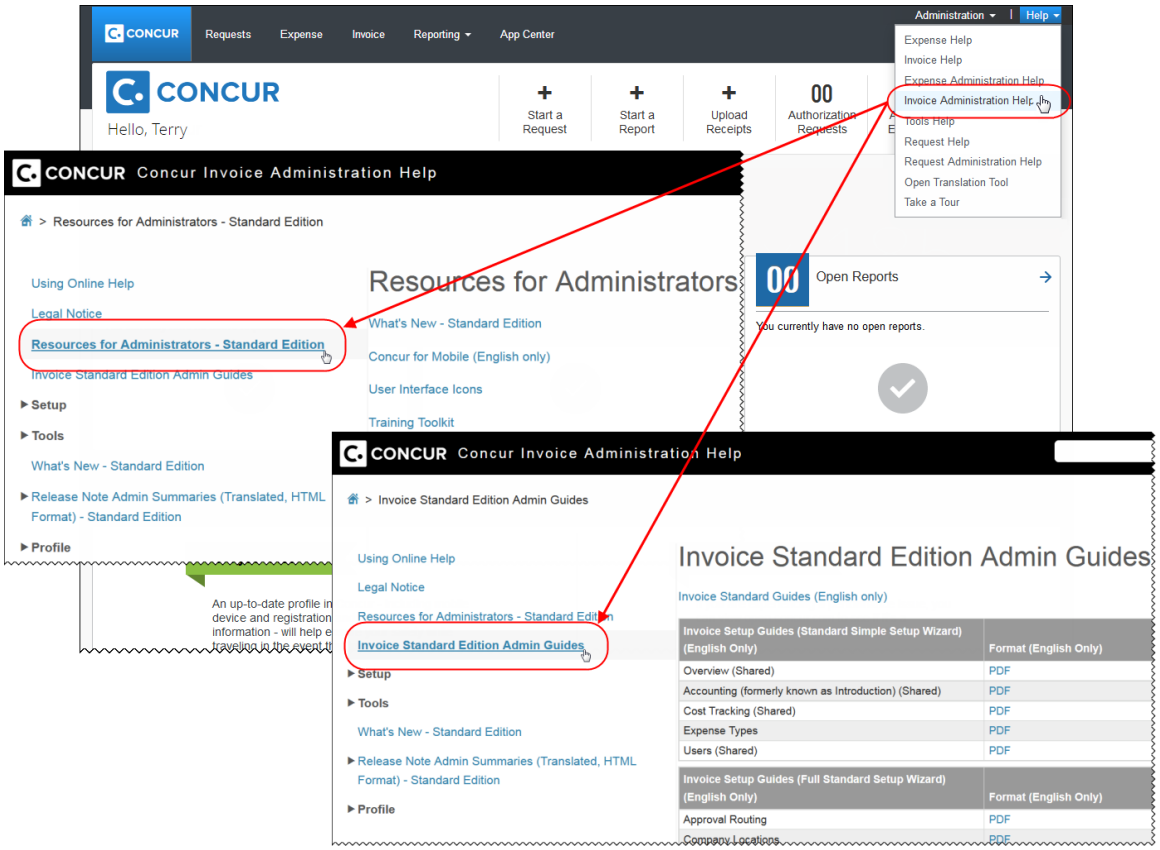
The *Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

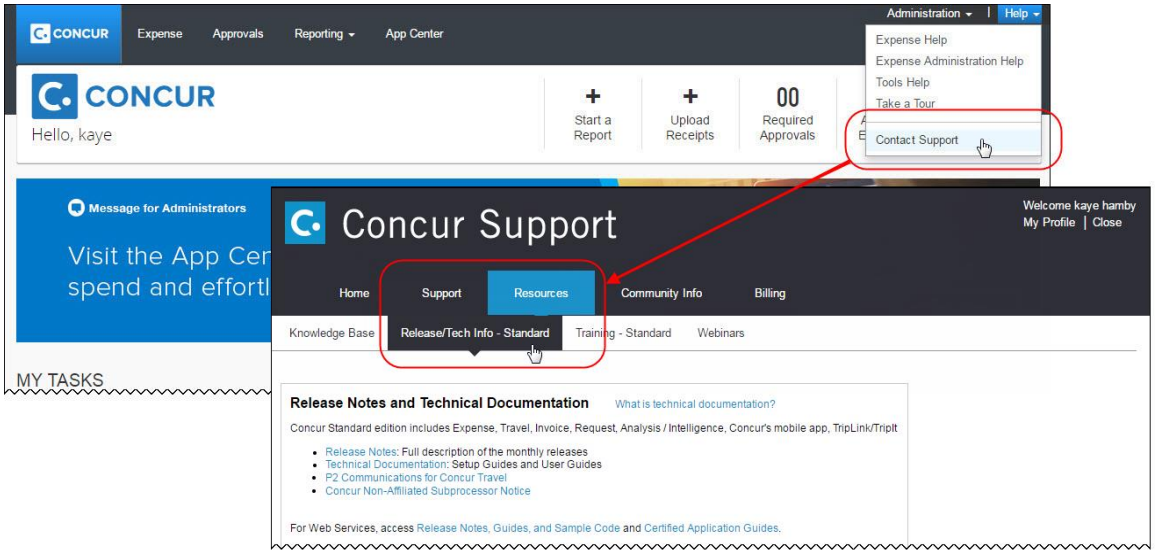
Any user with any "admin" role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources via online Help in Concur.



Concur Support Portal – Selected Users

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

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


CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Expense Help
Expense Administration Help
Tools Help
Take a Tour
Contact Support
CONCUR
Hello, kaye
Start a Report
Upload Receipts
00
Required Approvals
Message for Administrators
Visit the App Cer
spend and effortl
MY TASKS
Concur Support
Welcome kaye hamby
My Profile | Close
Home
Support
Resources
Community Info
Billing
Knowledge Base
Release/Tech Info - Standard
Training - Standard
Webinars
Release Notes and Technical Documentation
What is technical documentation?
Concur Standard edition includes Expense, Travel, Invoice, Request, Analysis / Intelligence, Concur's mobile app, TripLink/TripIt
Release Notes: Full description of the monthly releases
Technical Documentation: Setup Guides and User Guides
P2 Communications for Concur Travel
Concur Non-Affiliated Subprocessor Notice
For Web Services, access Release Notes, Guides, and Sample Code and Certified Application Guides.

SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: April 14, 2018 Update#1: Thursday, April 19 2:00 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Invoice functionality for Concur Professional edition.

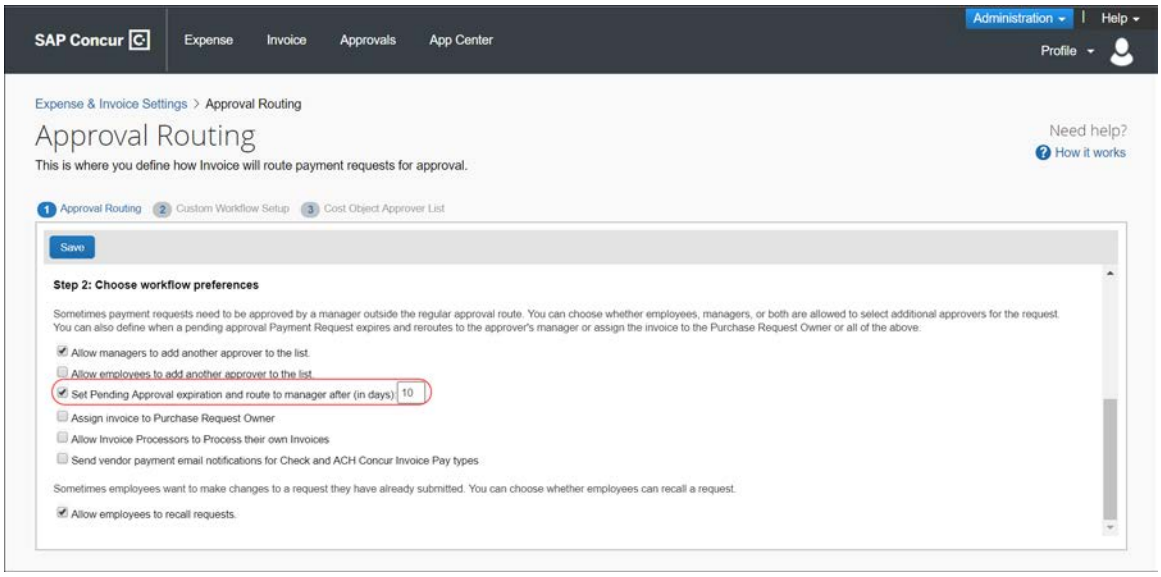
Invoice and Purchase Request

Approval Timeout Configurable

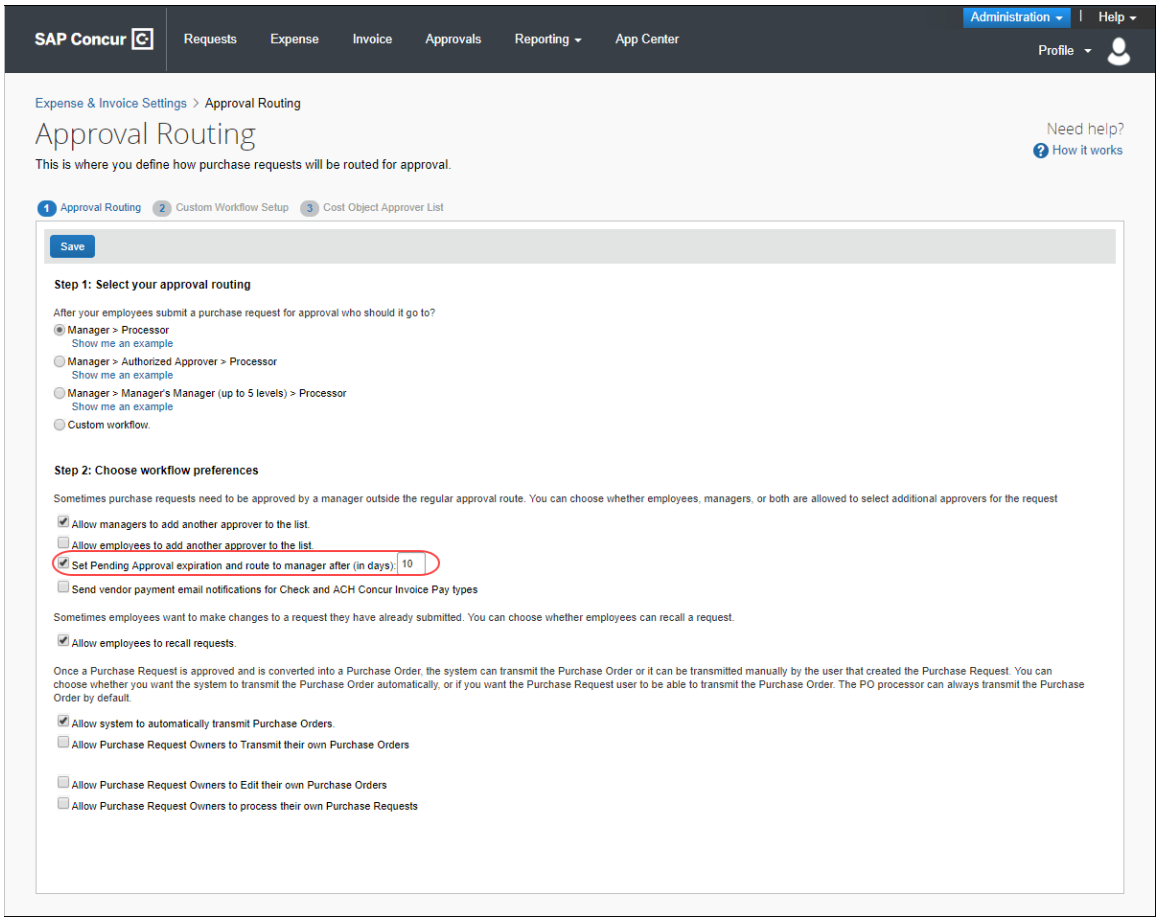
Overview

Clients can now modify the number of days after which an invoice waiting for approval is automatically routed to a designated manager. Previously, the approval timeout interval was set to 10 days and could not be modified.

Approval Routing page for Invoice:



Approval Routing page for purchase requests:



NOTE: This feature does not apply to cost object approval workflows.

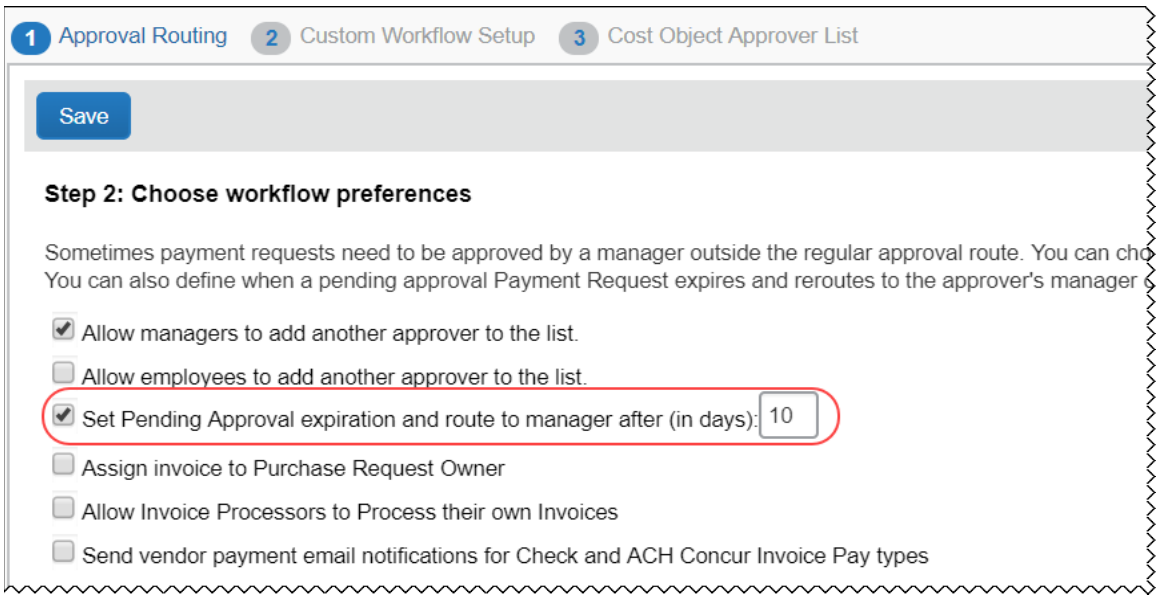
BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement gives clients more flexibility when configuring approval routing.

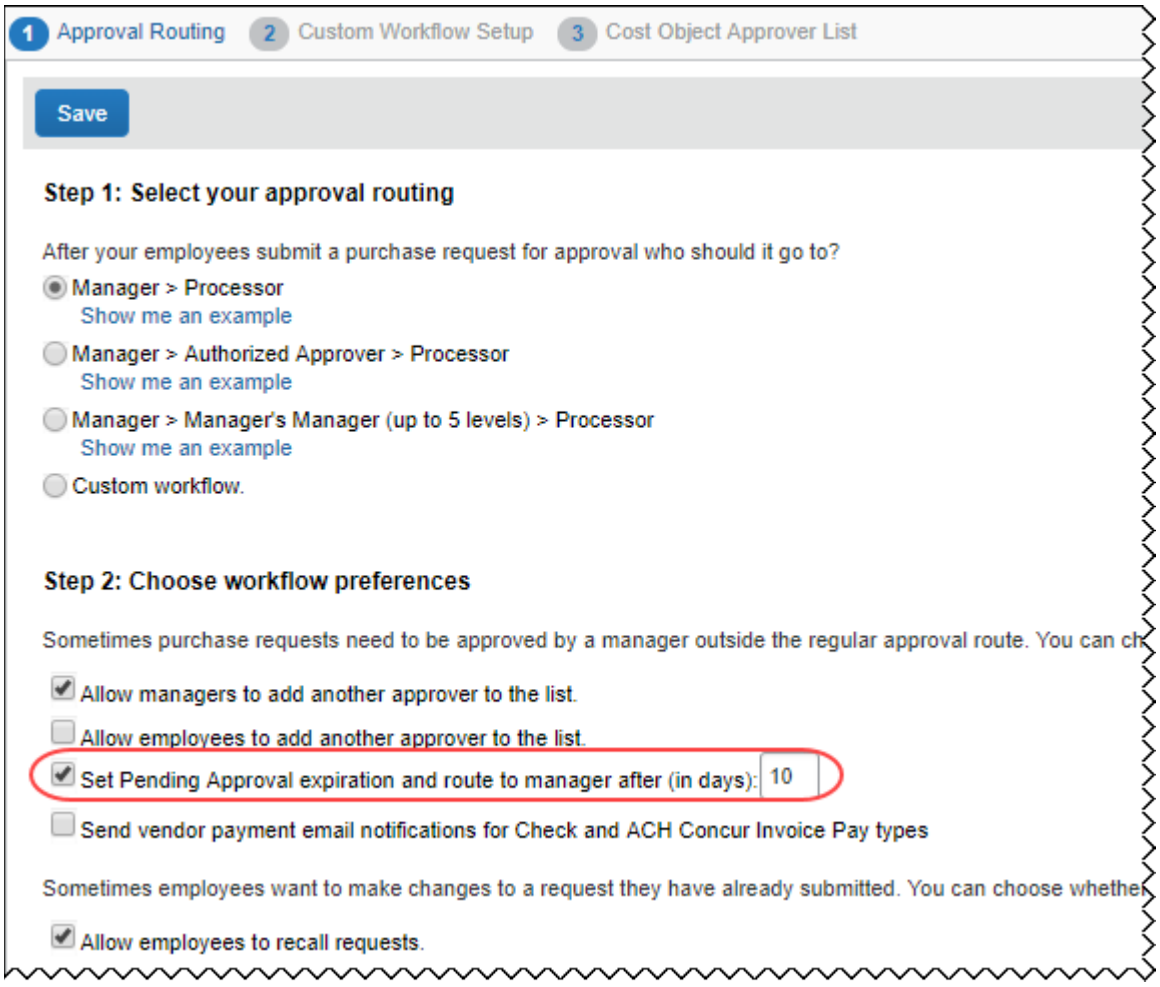
What the Admin Sees

The admin will see an updated setting on the **Approval Routing** page in Product Settings.

For Invoice:



For purchase requests:



Configuration/Feature Activation

The admin configures this feature on the **Approval Routing** page in Product Settings.

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

Purchase Request and Purchase Order

Bill-To and Ship-To Email Fields Added to Import and Export

Overview

On the **Manage Company Locations** page, when clients add an email address to a bill-to location or a ship-to location, if clients import or export company locations, the bill-to and ship-to email addresses are included in the information.

NOTE: The downloadable company locations import template has been updated to include the email address column. If you previously downloaded the import template, consider updating your template to the latest version.

BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement ensures that bill-to and ship-to email addresses are included when company locations are imported and exported.

What the Admin Sees

In the ship-to and bill-to import templates, the admin will see a new column labeled **CONTACT_EMAIL**. In the exported ship-to and bill-to spreadsheets, the admin will see a new column labeled **EMAIL ADDRESS**.

Configuration/Feature Activation

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

Product Settings

Clarification: Spend Category Column Displays Suggestions for English and Japanese Language Only

Overview

Clients who view Invoice in English or Japanese will see spend category suggestions at the top of the list in bold in the **Spend Category** column on the **Invoice - Expense Types** page in Product Settings.

NOTE: For all other languages, the **Spend Category** column displays spend categories in alphabetical order.

BUSINESS PURPOSE/CLIENT BENEFIT

This clarification makes it easier for clients to know what they are seeing in the **Spend Category** column depending on the language selected for their entity.

What the Admin Sees

The admin, who assigns a spend category to an expense type, will see the most commonly selected spend categories in bold at the top of the list in the **Spend Category** column on the **Invoice – Expense Types** page in Product Settings. The remaining spend categories are listed in alphabetical order.

Configuration/Feature Activation

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

Budget

Budget Release Notes

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

Standalone release notes provide greater visibility for Budget.

In-Product Messaging

(United States) Opt Out of In-Product Messaging

Overview

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

NOTE: The ability to opt out was previously only available to clients in Europe.

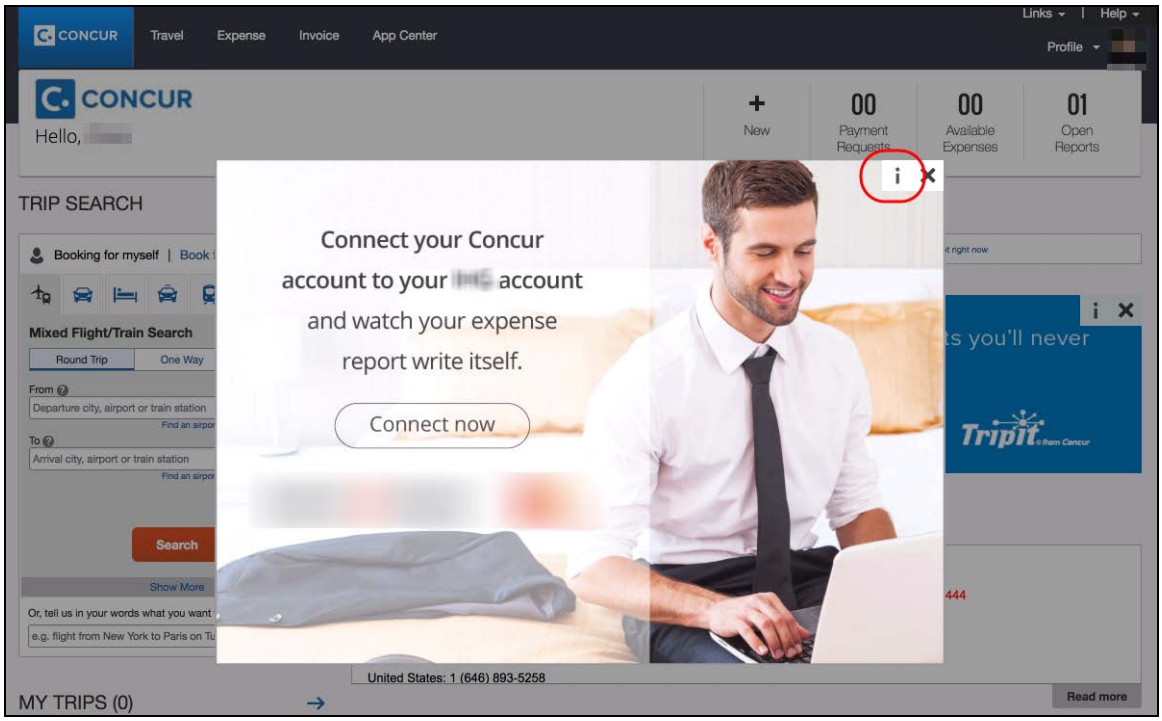
BUSINESS PURPOSE/CLIENT BENEFIT

This enhancement gives clients the ability to choose which in-product messaging they see.

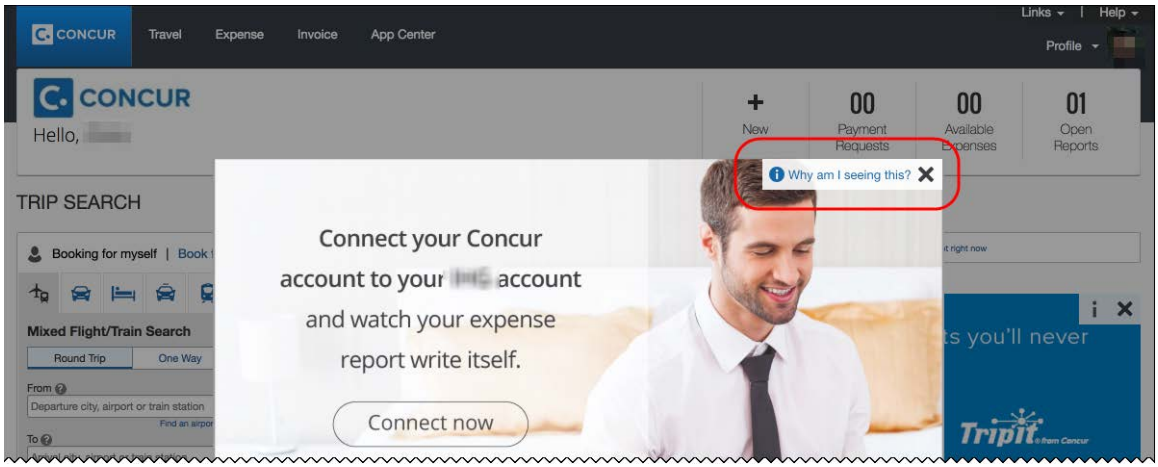
What the User Sees

WINDOW MESSAGES

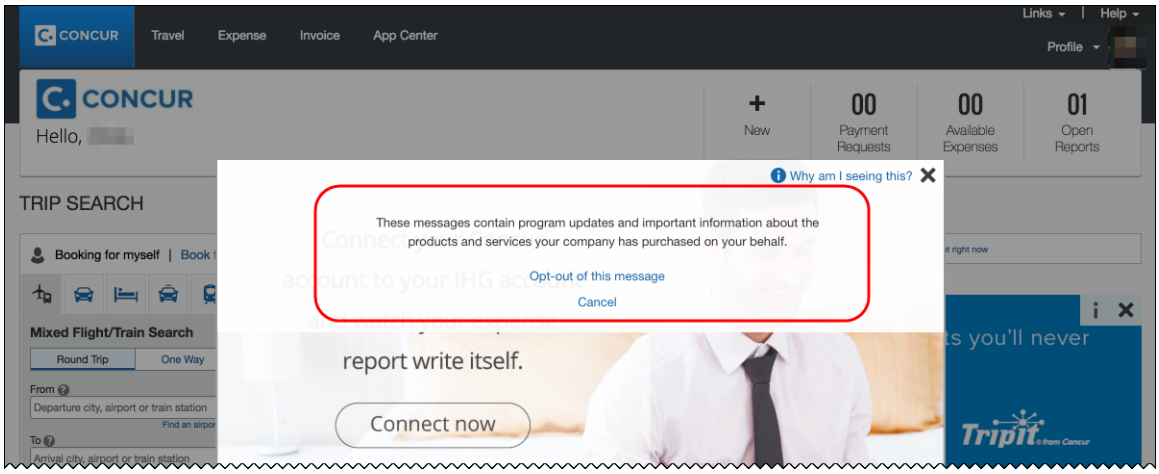
An information icon appears in the upper-right corner of the message.



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



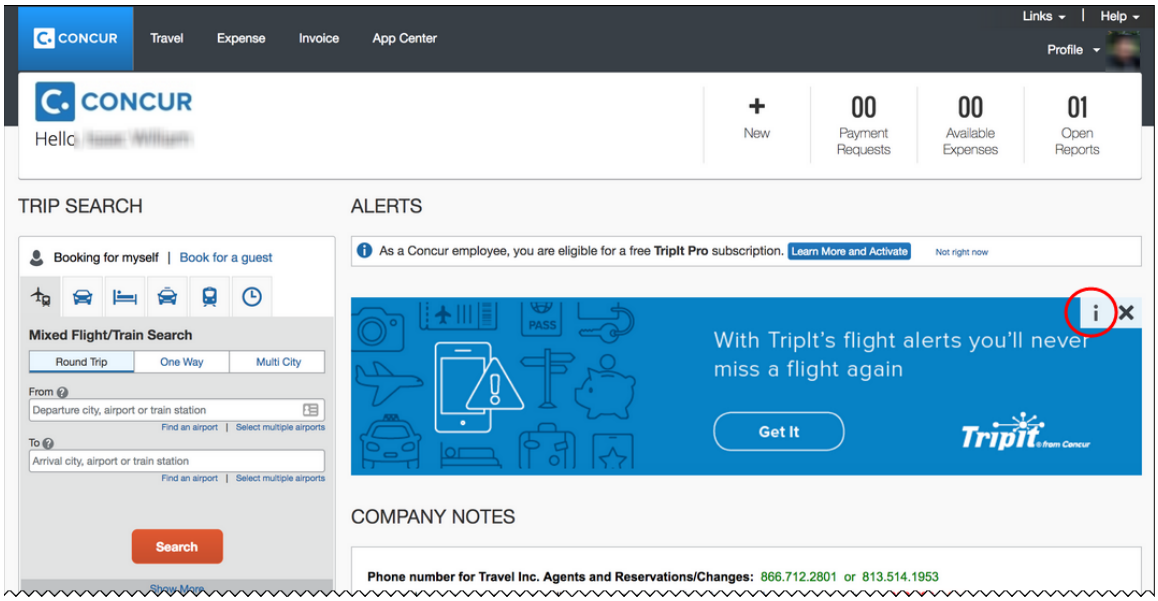
When the user clicks the *Why am I seeing this?* message, the area expands to provide information about why the user is seeing the message as well as a link the user can click to opt out of seeing similar messages in the future. After opting out, the user might still see in-product messages related to other categories.



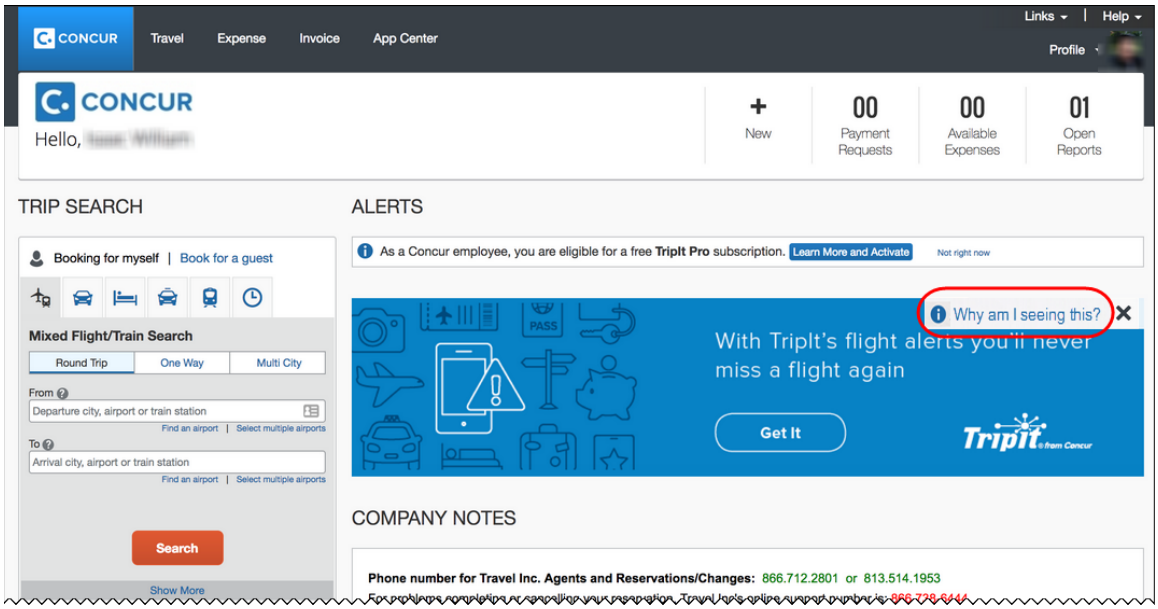
When the user clicks the close button (X in the upper-right corner), the window closes.

IN-PAGE MESSAGES

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



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



When the user clicks on the *Why am I seeing this?* message, the area expands to provide information about why the user is seeing the message as well as a link the user can click to opt out of seeing similar messages in the future. The user might still see in-product messages related to other categories.

Miscellaneous

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

Overview

In the March release, the Users by Browser report was updated to include more information. These updates apply only to the North America data center.

NOTE: The report will be updated for clients in the remaining data centers in a future release.

Configuration/Feature Activation

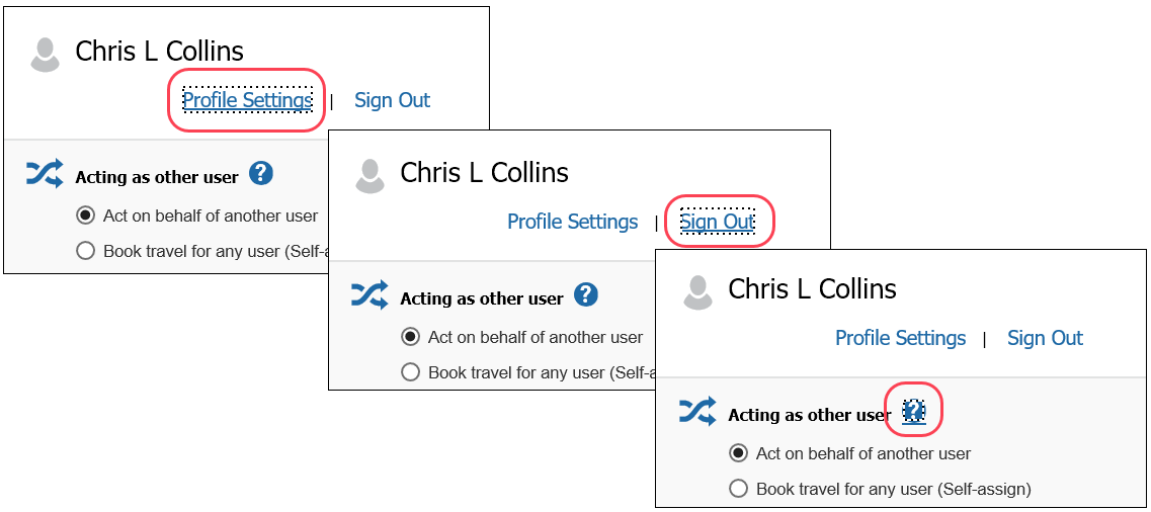
This update occurred automatically for clients who use the North America data center.

Clarification: Accessibility – Keyboard Access for Working for Others Quick Help

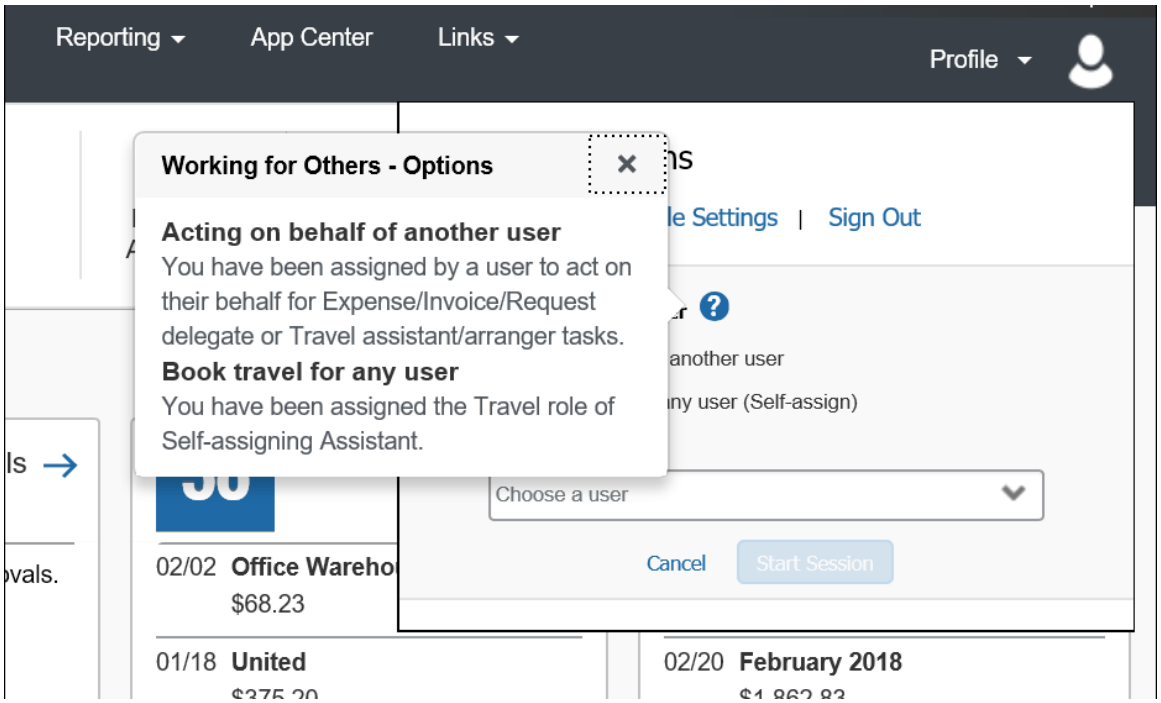
Overview

In the March release, the **Working for Others** Quick Help ( ) became accessible via the keyboard. This enhancement enables clients to select the Quick Help icon by using the Tab key and to access the Quick Help information by pressing the spacebar or the Enter key.

In the following example, a user tabs from **Profile Settings** to **Sign Out** to the icon.



When the icon is selected, the user can press the spacebar or the Enter key to access the Help text.



Configuration/Feature Activation

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

Planned Changes

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

Data Retention

Planned Change New Feature for Outdated Data

Overview

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

What the Admin Sees

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

Configuration/Feature Activation

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

More information will be available in future release notes.

Text FTP

Planned Change Support for Plain Text FTP to End May 15, 2018

Overview

SAP Concur is announcing the end of support for plain text FTP as a means to transfer data to and from SAP Concur.

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On May 15, 2018, SAP Concur Operations will apply a security update to our File

Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing commitment to securing our customers' data and meeting the audited security requirements of the "Concur Trust Platform".

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

What This Means – The Client Experience

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

Configuration/Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

Privacy Agreement

Planned Change Removing the "Privacy Agreement" Page

Overview

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

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

BUSINESS PURPOSE/CLIENT BENEFIT

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

FAQ

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

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

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

A. This change is targeted for May 2018; after the change is implemented you will no longer see the privacy agreement – whether customized or generic.

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

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

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

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

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

A. You must evaluate and find alternative methods of communicating any separate privacy statements or information to your users.

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

A. You will not be able to configure the SAP Concur privacy statement. Its function is to describe SAP Concur's processing activities regarding customer data.

Q. Who can I contact for more information?

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

Configuration/Feature Activation

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

Planned Change New Privacy Statement Planned for May Release

Overview

In the release note named ***Planned Changes** Removing the "Privacy Agreement" Page*, we describe changes that will occur when the current customizable privacy policy is discontinued. We also discuss the new Privacy Statement that SAP Concur will provide as a requirement of being a "processor" of customer data.

NOTE: Be aware that the term "processor" is *not* related to the processor roles found in most SAP Concur products.

The intent is to replace all occurrences of customized or unique policy text – *in all SAP Concur products and the mobile app* – with the SAP Concur Processor Privacy Statement, which describes our processing activities of customer data.

Be aware that the new text will be available soon, targeted for May.

BUSINESS PURPOSE/CLIENT BENEFIT

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

Configuration/Feature Activation

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

Client Notifications

Subprocessors

SAP Concur Non-Affiliated Subprocessors Notice

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Monthly Browser Certifications and Supported Configurations

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Additional Release Notes and Other Technical Documentation

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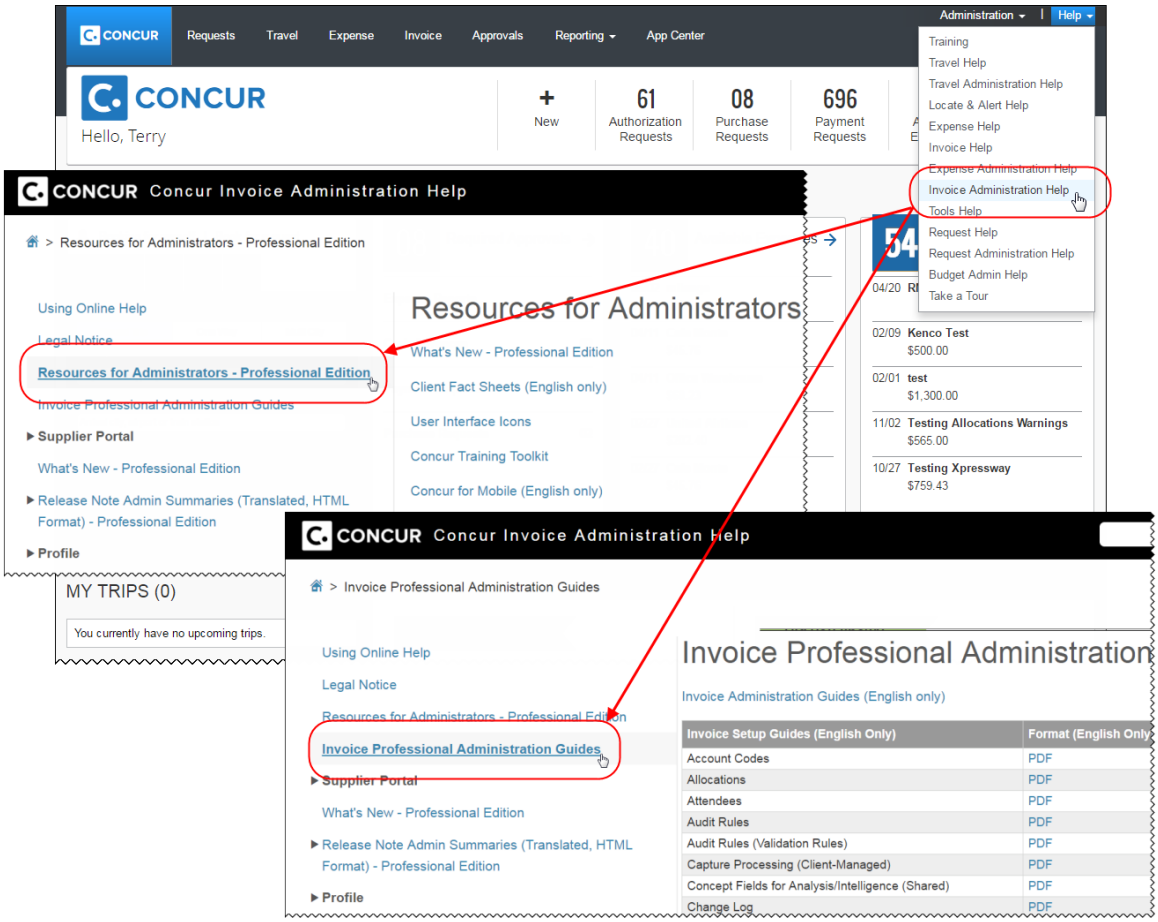

Concur Support Portal – Selected Users

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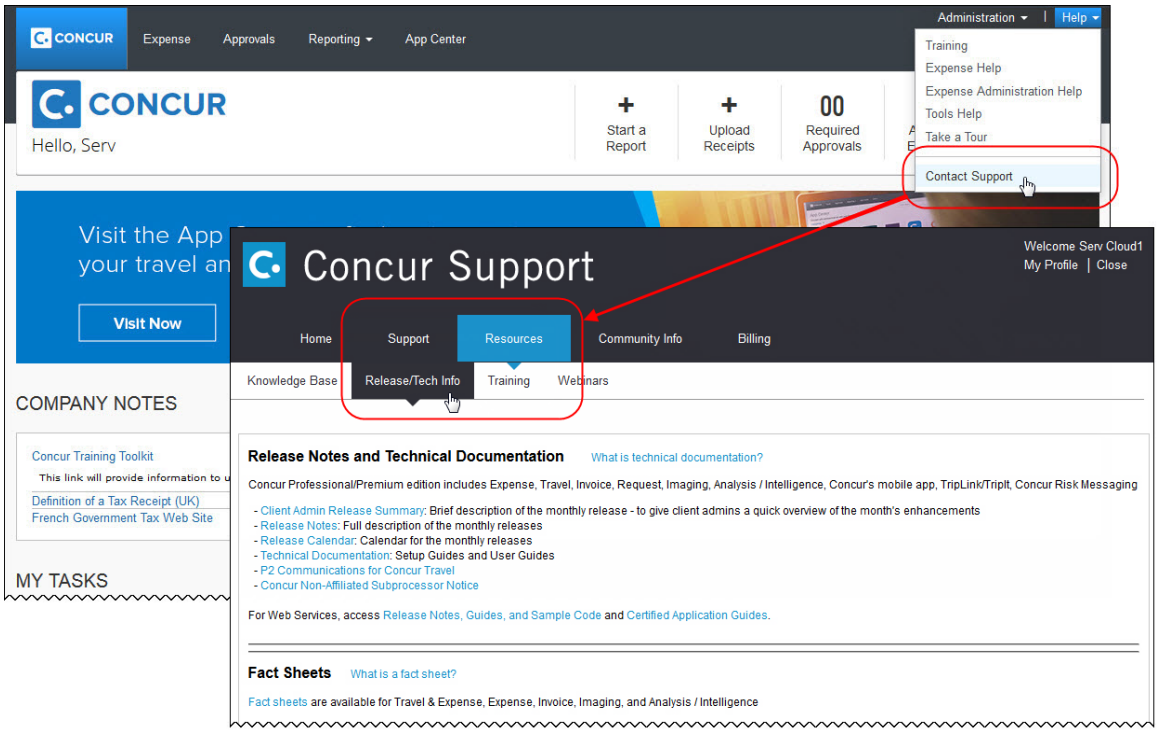
If a user has the proper Concur Support Portal permissions, then the **Contact Support** option is available to them on the **Help** menu. The user clicks **Help > Contact Support**. On the **Concur Support** page, the user clicks **Resources** > **Release/Tech Info**.



SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: May 12, 2018 Update #3: Thursday, May 24 5:00 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Invoice functionality for Concur Professional edition.

Invoice Capture

Capture Processing Enhancements

Overview

CONCUR- AND CLIENT-MANAGED

- **Description Field Changes:** Columns that display descriptions now accommodate more characters and, if the column is resized, the new size is retained for future sessions.
- **Message if Document Processed Multiple Times:** If a document is processed more than once, a message that the document has been processed previously is displayed during the document separation and verification tasks.
- **New Verification Page Fields:** Two new title bar fields, **From Email Address** and **Company Name**, have been added to the **Verification** page.
- **Alert if Line Item and Header Totals Do Not Match:** The system now displays a warning if the line item total and header total do not match (that is, if the amount remaining to be itemized is not zero).
- **Magnify a Thumbnail in Document Separation:** A magnification tool has been added to the document separation task. This enhancement enables the admin to more clearly read the thumbnail image that is available in the document separation task.
- **Break Up and Delete Functions in Document Separation:** An admin can now more easily break up and delete a document that is available to them in the document separation task.

CONCUR-MANAGED ONLY

- **Instructions Field Added to Document Separation:** The admin performing the document separation task will now see an **Instructions** field identical in appearance and function to the one currently included in the verification task.

CLIENT-MANAGED ONLY

- **Default Maximum Number of Batches Listed Is Now 100:** The default maximum number of batches that are listed on the **Capture Batch List** page is now 100. Previously, 25 was the default maximum number of batches listed on the page.

BUSINESS PURPOSE / CLIENT BENEFIT

These enhancements provide additional flexibility and assurances when working with Invoice capture processing.

Configuration / Feature Activation

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

Data Retention

New Early Access Feature for Outdated Data

Overview

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

The feature provides the following functionality:

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

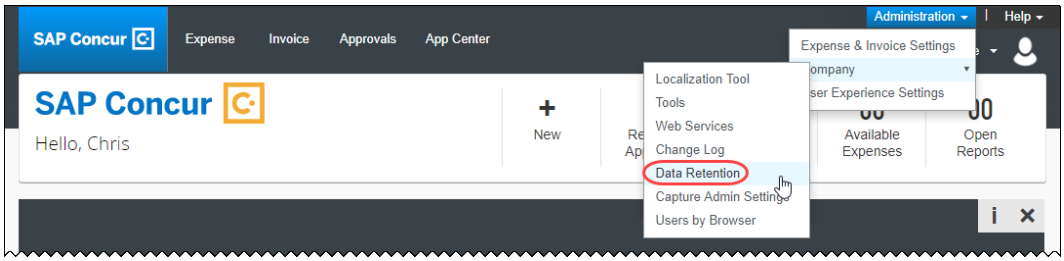
For Invoice Standard, the existing admin role has been granted the permission to administer (set up and edit) the Data Retention configuration and can view and access the Data Retention link on the Tools page. After making configuration changes, the admin receives a 72-hour confirmation email of those changes.

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the Admin Sees

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



Configuration / Feature Activation

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

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

Privacy Agreement

UPDATE Processor Privacy Statement Link – Targeted for May 25

Overview

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

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

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

Configuration / Feature Activation

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

Cookie Preferences

New Cookie Preferences Link in the SAP Concur Footer

Overview

Some cookie-related process changes and links were introduced because of specific consent requirements in Europe.

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

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

IMPORTANT

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

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

  Several consent options are described on the following pages.

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

What the User Sees

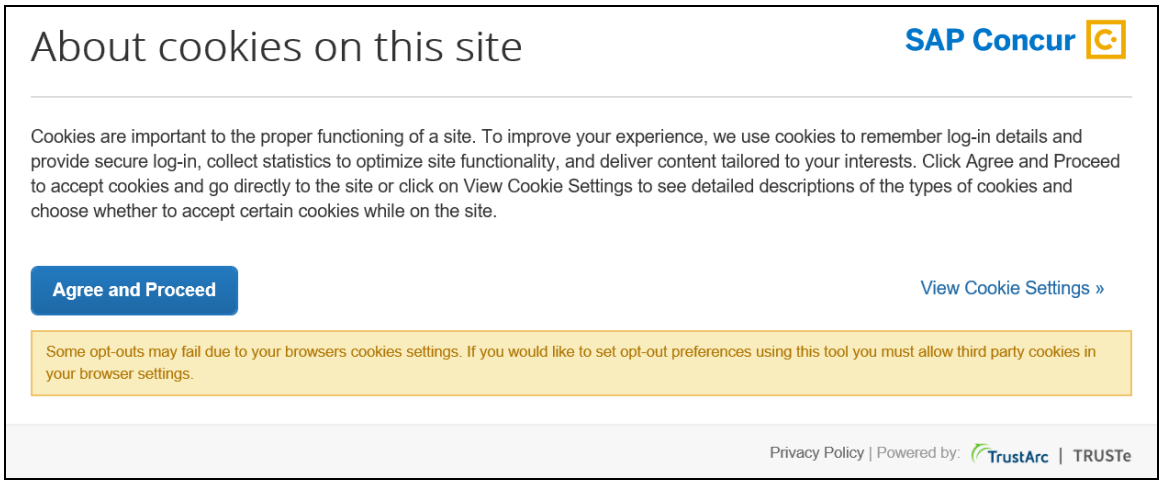
What the user sees depends on the country in which the user is physically located when they sign in to SAP Concur. Each country decides how cookies are handled. For example, currently Germany, France, and the Netherlands require active consent. In these countries, SAP Concur cannot save cookies – of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

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

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

ACTIVE CONSENT REQUIRED

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

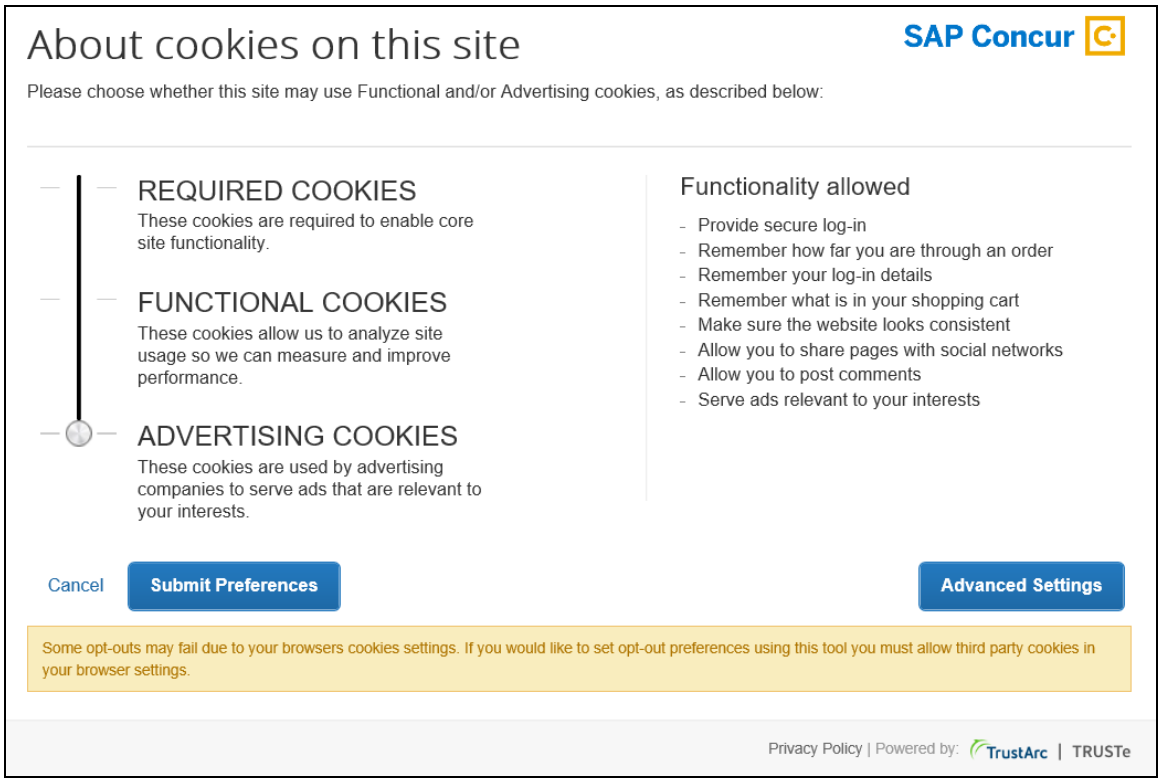


The user can:

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

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

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



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

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

The user can:

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

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

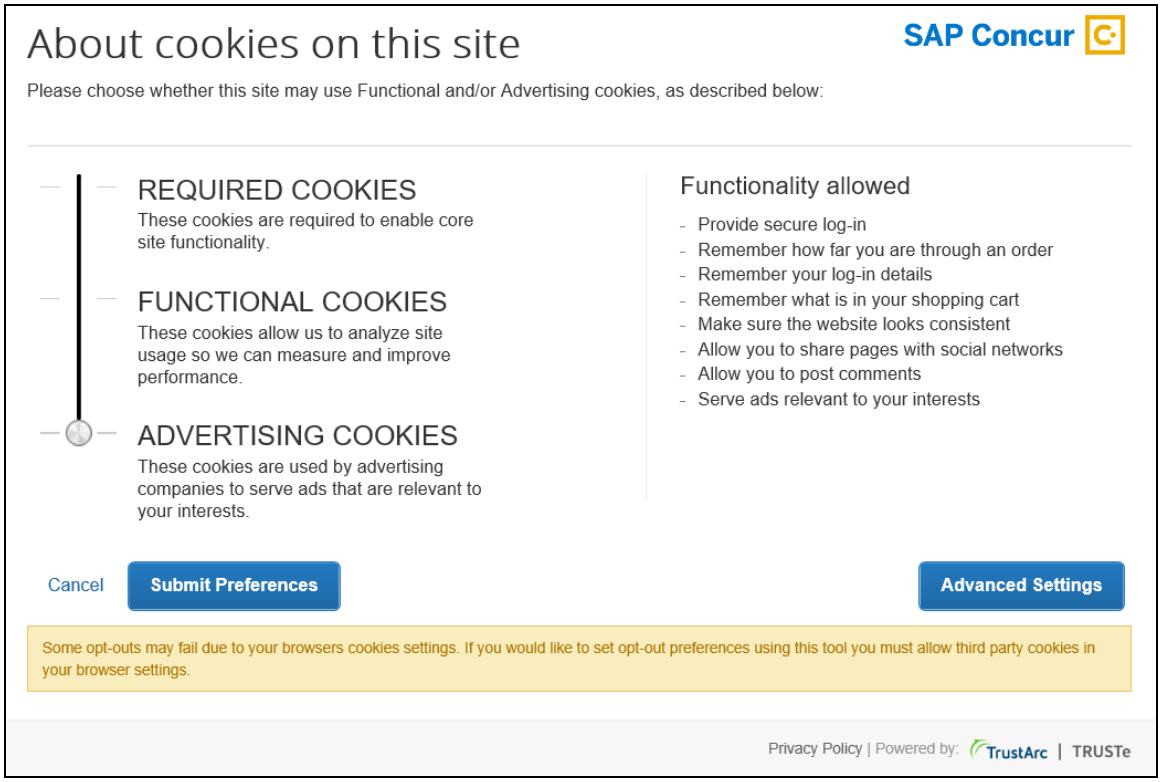
Once the user consents, the requirement is satisfied and the consent message does not appear again.

PASSIVE CONSENT

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

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

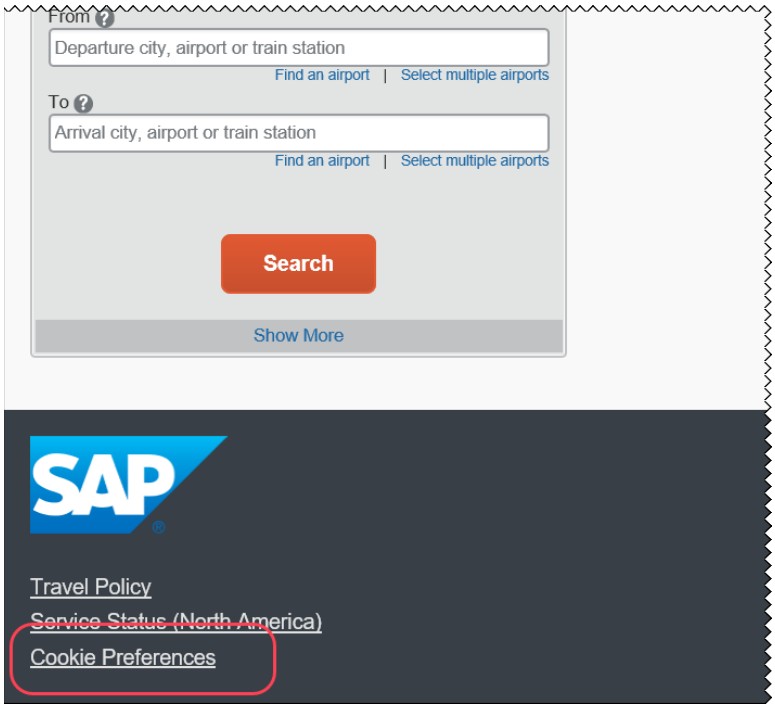
If the user clicks **Want to know more?**, the user sees the cookie options (as described previously).



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

MAKING CHANGES

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



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

⚠ **IMPORTANT:** Not all pages in SAP Concur display the footer; however, the user can return to the Home page and click the **Cookie Preferences** link there.

Configuration / Feature Activation

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

Whitelist for TrustArc.com

Overview

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration / Feature Activation

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

QuickBooks

QuickBooks Connector: Ending Support for QuickBooks 2015

Overview

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

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

- QuickBooks 2016
- QuickBooks 2017
- QuickBooks 2018

The currently supported versions of the QuickBooks Web Connector are:

- 2.2.0.71
- 2.2.0.80

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration / Feature Activation

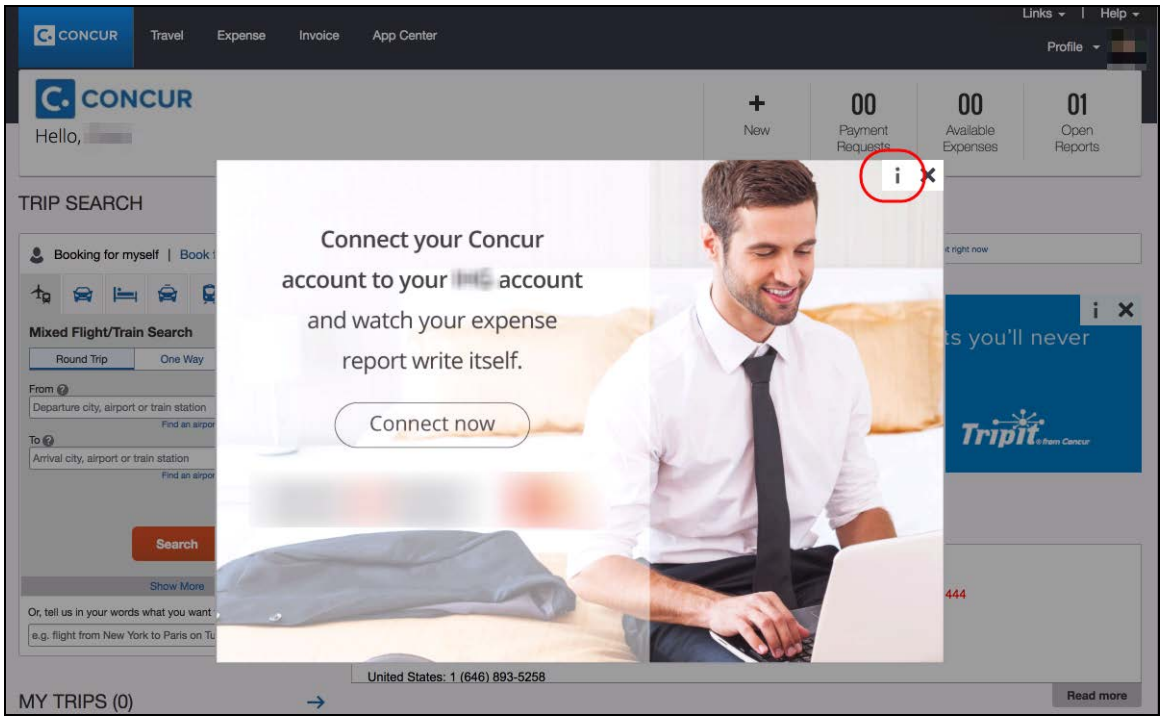
There are no configuration or activation steps. Contact Intuit with any questions regarding the support policy for QuickBooks Desktop 2015.

In-Product Messaging

Clarification: Opt Out of In-Product Messaging

Overview

Previous release notes included information about and instructions for opting out of in-product messaging (IPM).



Opt-Out Clarification:

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

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

Configuration / Feature Activation

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

For more information about opting out of in-product messaging, refer to the *SAP Concur Invoice Standard Release Notes* for April 2018.

Budget

Budget Release Notes

Overview

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

BUSINESS PURPOSE / CLIENT BENEFIT

Standalone release notes provide greater visibility for Budget.

Users by Browser Report

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

Overview

In the March release, the Users by Browser report was updated to include more information. These updates apply only to the North America data center.

NOTE: The report will be updated for clients in the remaining data centers in a future release.

Configuration / Feature Activation

This update occurred automatically for clients who use the North America data center.

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.

Invoice

Planned Changes Payment Request(s) Renamed to Invoice(s)

Overview

In a future release, Sap Concur will replace instances of the term "payment request" and its iterations with the term "invoice" and its iterations. These changes will be made in the user interface, the Invoice documentation, and any other SAP Concur product documentation where it appears.

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps to ensure that the terminology used in SAP Concur is consistent with industry standard terminology.

Configuration / Feature Activation

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

Plain Text FTP Support

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

Overview

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

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

Plain text FTP is not a secured protocol and has inherent security vulnerabilities. On September 1st, 2018, SAP Concur Operations will apply a security update to our File Transfer infrastructure, restricting the use of plain text FTP as a part of our ongoing

commitment to securing our customers' data and meeting the audited security requirements of the SAP Concur Trust Platform.

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

What This Means – The Client Experience

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

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

Client Notifications

Subprocessors

SAP Concur Non-Affiliated Subprocessors Notice

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

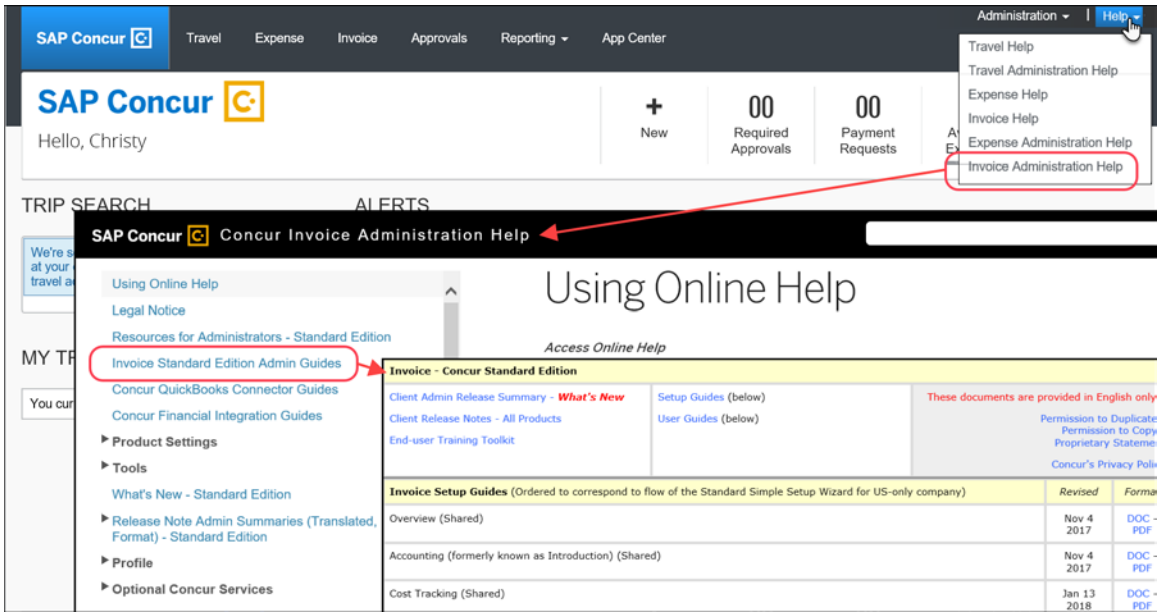
The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

A user who is assigned an admin role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through **Invoice Administration Help**.

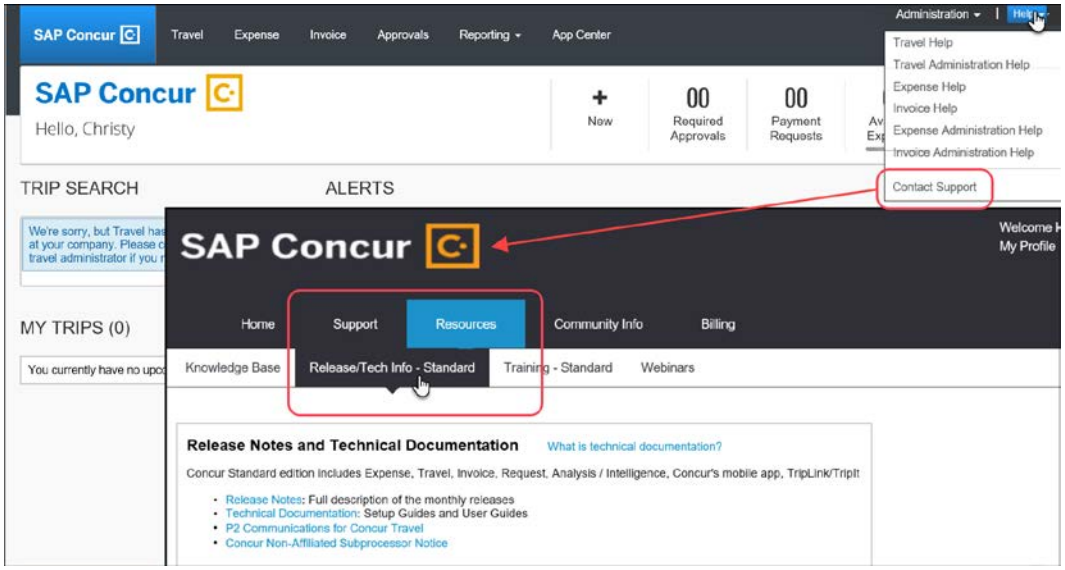


Concur Support Portal – Selected Users

Users who are assigned the correct Concur Support Portal permissions can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through the Concur Support Portal

- ***To access the Concur Support Portal (for users with the correct permissions):***

  1. Click **Help > Contact Support**.
  2. On the support page, click **Resources > Release/Tech Info**.


SAP Concur
Travel
Expense
Invoice
Approvals
Reporting
App Center
Administration
Help
Travel Help
Travel Administration Help
Expense Help
Invoice Help
Expense Administration Help
Invoice Administration Help
Contact Support
Hello, Christy
New
00
Required Approvals
00
Payment Requests
TRIP SEARCH
ALERTS
MY TRIPS (0)
Welcome
My Profile
Home
Support
Resources
Community Info
Billing
Knowledge Base
Release/Tech Info - Standard
Training - Standard
Webinars
Release Notes and Technical Documentation
What is technical documentation?
Concur Standard edition includes Expense, Travel, Invoice, Request, Analysis / Intelligence, Concur's mobile app, TripLink/TripIt
Release Notes: Full description of the monthly releases
Technical Documentation: Setup Guides and User Guides
P2 Communications for Concur Travel
Concur Non-Affiliated Subprocessor Notice

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SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: June 16, 2018 Update #2: Monday, June 25 1:00 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Invoice functionality for Concur Professional edition.

Invoice

(Japan) E-Bunsho Timestamp Available in Early Adopter Release

Overview

With the e-Bunsho Timestamp feature for Japan, Invoice now supports digital timestamps of invoice images from companies and invoice service suppliers.

NOTE: This feature is currently only available to designated clients. If you are interested in enabling this feature, contact your Account Manager or Project Manager.

When this feature is enabled, rules are put in place to ensure that users provide the necessary invoice information to maintain legal compliance with Japan's e-Bunsho regulation. A user must first confirm the invoice image is the valid image for the invoice being entered before they can timestamp the image and the invoice cannot be submitted for approval until the Invoice image has been successfully timestamped.

There is a validation process for monitoring received, pending, requested, and ineligible timestamps. The validation process revalidates the successfully timestamped invoice images and displays counts and totals by date range for valid and invalid timestamped images.

NOTE: Although the SAP Concur mobile app supports the e-Bunsho timestamp feature for Expense, the e-Bunsho timestamp feature for Invoice is not currently supported and timestamped invoices cannot be approved through the mobile app.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature enables clients in Japan to maintain legal compliance with e-Bunsho regulations if they use digital invoices in lieu of paper invoices.

What the Admin Sees

When the e-Bunsho feature is enabled, the admin sees that Japan policies tied to the Japan Country Pack now have e-Bunsho timestamp functionality.

Configuration / Feature Activation

This feature is available in early adopter release and is enabled by SAP Concur for designated clients. If you are interested in enabling this feature, contact your Account Manager or Project Manager.

📖 For more information about this feature, refer to the *Japan e-Bunsho Timestamp Feature* fact sheet for Invoice Standard.

Vendor Management

(Japan) Vendor Form Available in Early Adopter Release

Overview

A new vendor form is displayed when the Japan Country Pack is enabled and the related policy is assigned to a user.

NOTE: This feature is currently only available to designated clients.

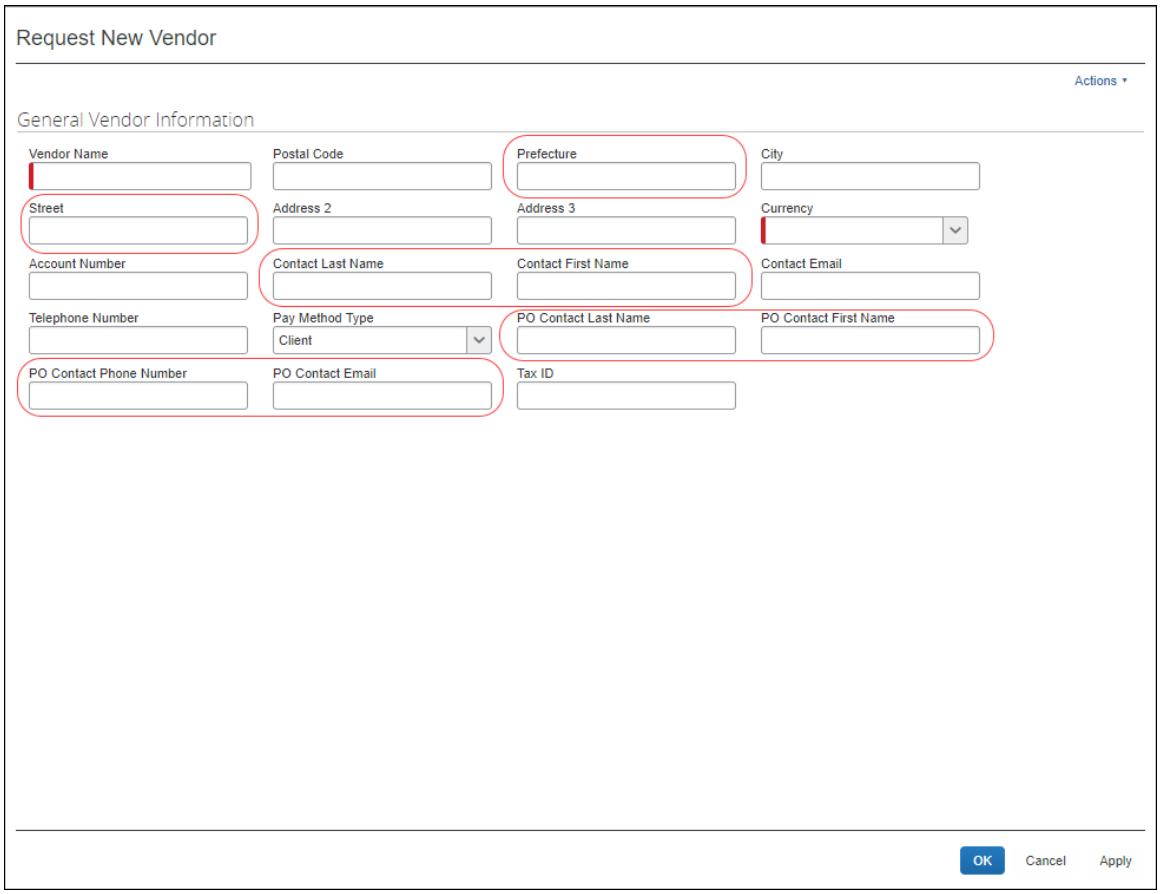
BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides clients with a new vendor form containing fields specific to the Japanese locale.

What the User Sees

The user sees a new form in the **Request New Vendor** and **Vendor Information** windows. The new vendor form contains some updated field labels and some fields have been moved to a new position on the form.

New Vendor Form:



What the Invoice Owner and Vendor Manager See

The invoice owner and vendor manager see the new form in the **Request New Vendor** and **Vendor Information** windows that are available from the **Payment Manager** and **Vendor Management** pages.

Configuration / Feature Activation

This feature is available in early adopter release and is enabled by SAP Concur for designated clients.

TLS 1.0 Email

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

Overview

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

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

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

Configuration / Feature Activation

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

Change Log

Now Logging When a Delegate is Assigned

Overview

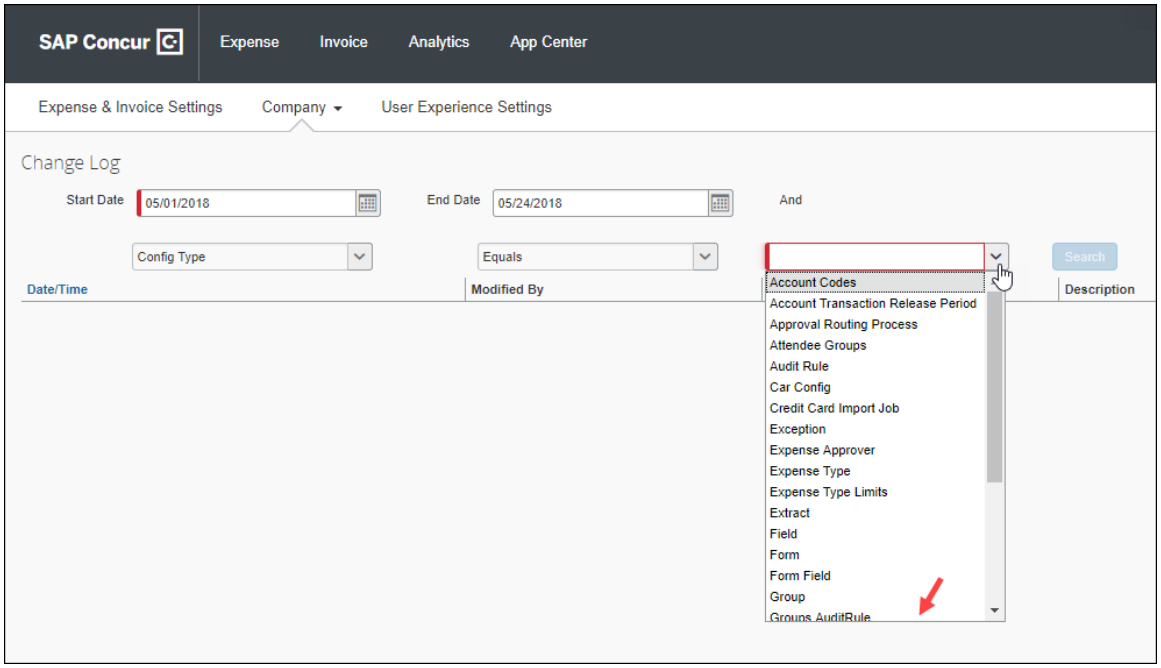
When a user adds a delegate, the action will leave an audit trail. The steps for adding a delegate are unchanged. This change includes logging the addition of delegates that are added through the user interface or an Excel file import. This change affects only the addition of delegates. The removal of delegates is not logged.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enhances audit capabilities.

What the Admin Sees

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



Configuration / Feature Activation

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

Cookie Preferences

Reminder New Cookie Consent Process

Overview

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

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

Each country decides which option it wants to use.

IMPORTANT

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

- TrustArc, a global privacy and data governance provider, manages the cookie preference choice of each user for SAP Concur. Several consent options are described on the following pages.
  - Be aware the TrustArc provides all consent text and manages all translations of the consent text. Neither SAP Concur nor its customers can affect the text or translation in any way.
  - Consent regulations differ by country. TrustArc determines the consent option that is appropriate for each user, based on each country's regulations. SAP Concur cannot affect that determination in any way nor does SAP Concur have a list of countries and their consent regulations.
- Be aware that any country at any time can decide to require active user consent. So, specific countries are not listed in this release note because the affected countries can change often and quickly.
- SAP Concur uses geolocation – based on the user's IP address – to identify the user's location (country), which determines if user consent is active or passive. Be aware that if the user is using VPN, then geolocation will likely identify the user's country as the country associated with the VPN.
- In accordance with regulations, the consent and modification processes described here must be completed by individual SAP Concur users. ***There is no option for companies to make these choices for their users.***
- Once a user has actively accepted cookies, they cannot modify their cookies options to stop accepting cookies except to remove all cookies and start over.

BUSINESS PURPOSE / CLIENT BENEFIT

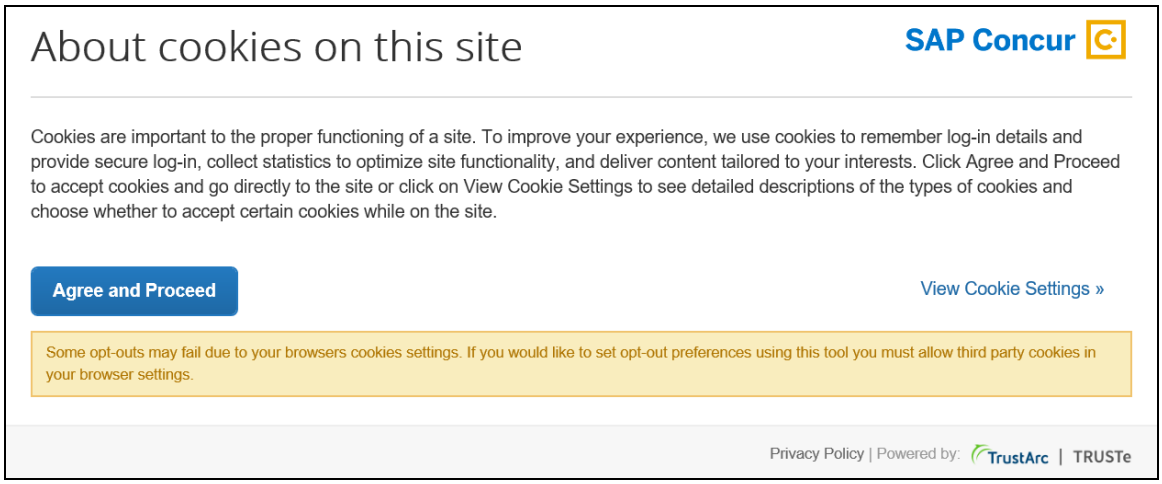
These changes keep SAP Concur in compliance with global privacy requirements.

What the User Sees

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

ACTIVE CONSENT REQUIRED

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

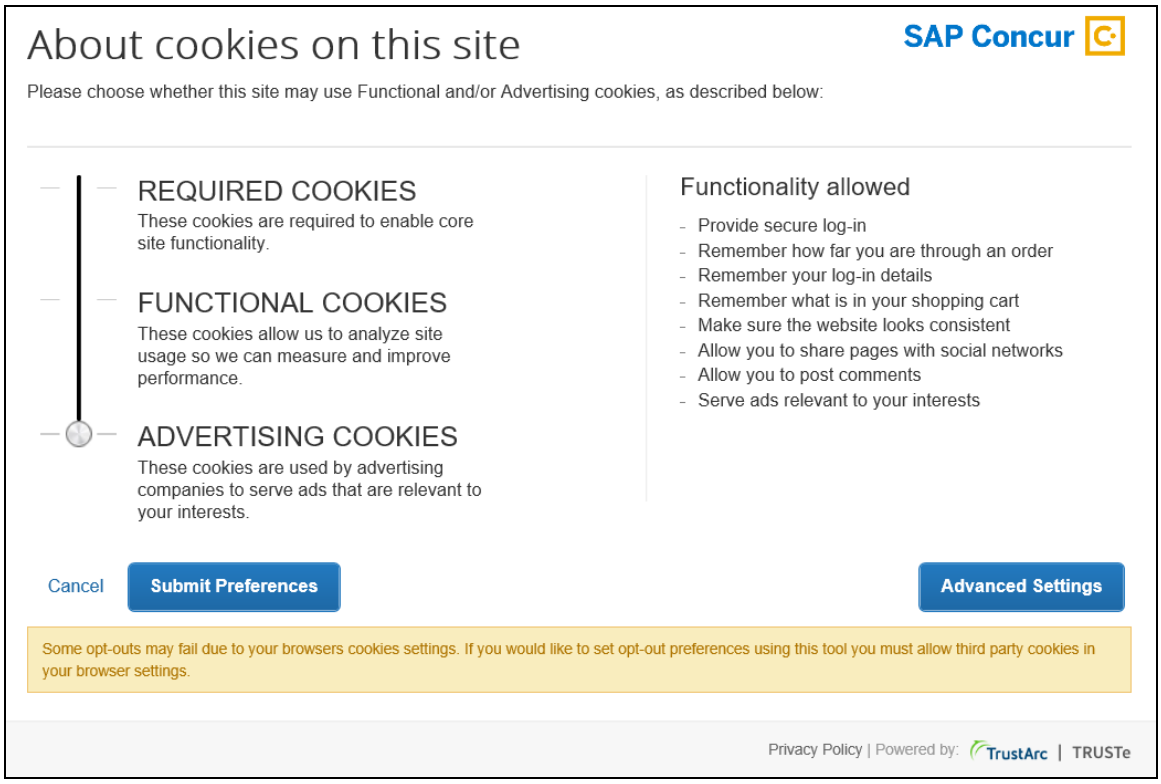


The user can:

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

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

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



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

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

The user can:

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

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

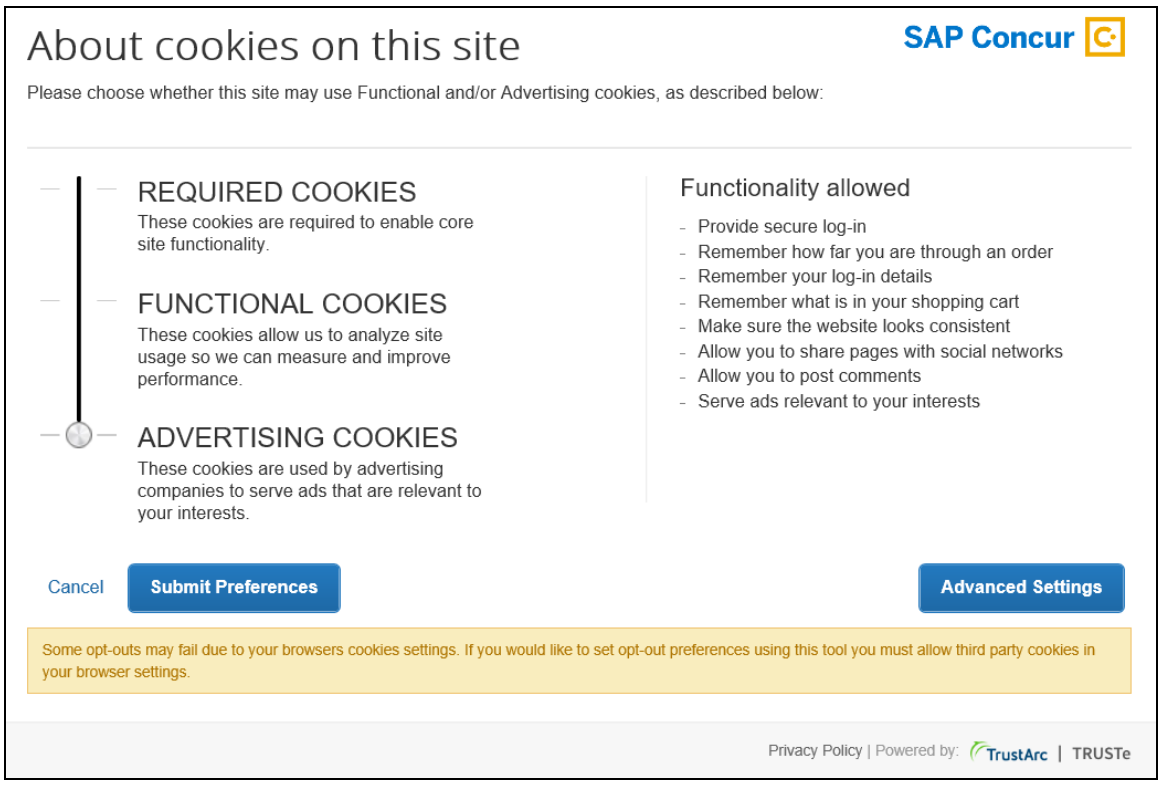
Once the user consents, the requirement is satisfied and the consent message does not appear again.

PASSIVE CONSENT

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

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

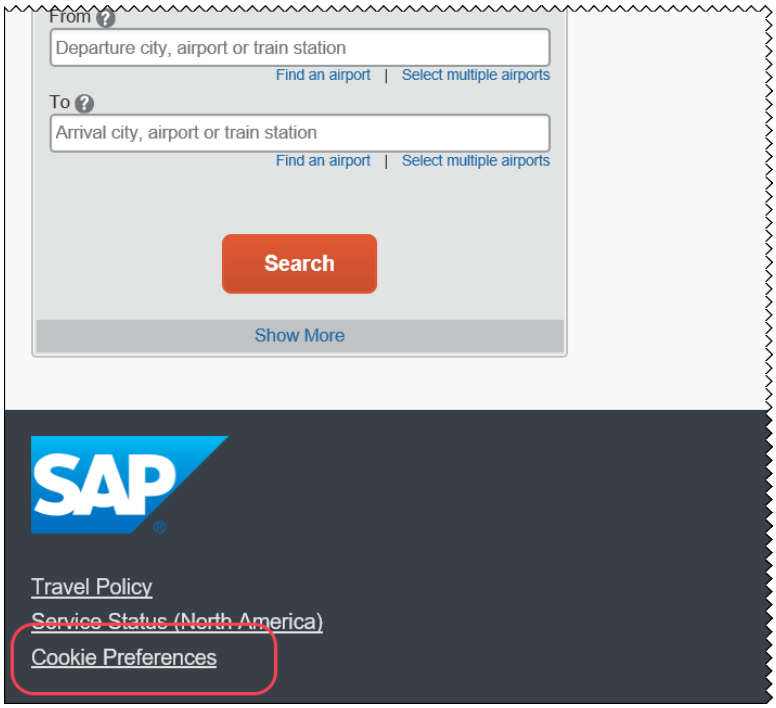
The user clicks **Want to know more?**, the user sees the cookie options (as described previously).



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

MAKING CHANGES

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



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

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

Configuration / Feature Activation

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

Reminder Whitelist for TrustArc.com

Overview

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

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

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

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

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

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

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration / Feature Activation

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

QuickBooks

QuickBooks Connector: Ending Support for QuickBooks 2015

Overview

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

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

- QuickBooks 2016
- QuickBooks 2017
- QuickBooks 2018

The currently supported versions of the QuickBooks Web Connector are:

- 2.2.0.71
- 2.2.0.80

BUSINESS PURPOSE / CLIENT BENEFIT

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

Configuration / Feature Activation

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

Planned Changes

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

Invoice

Planned Changes Payment Request(s) Renamed to Invoice(s)

Overview

In a future release, Sap Concur will replace instances of the term "payment request" and its iterations with the term "invoice" and its iterations. These changes will be made in the user interface, the Invoice documentation, and any other SAP Concur product documentation where it appears.

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps to ensure that the terminology used in SAP Concur is consistent with industry standard terminology.

Configuration / Feature Activation

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

Planned Changes Import Historical Invoices

Overview

In a future release, support for a new record type will be added to the *request_comma_delimited_v2.xml* invoice import definition file. The new record type, 210, will enable clients to import historical invoices into Concur Invoice.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables clients to import invoices that have already been processed. For example, new SAP Concur clients will be able to import invoices that were processed by a previous system.

Configuration / Feature Activation

This change will be automatically available to clients who use the *request_comma_delimited_v2.xml* invoice import definition file. When it becomes available, the 210 record type can be set to true or false. If the record type is set to true, the affected invoice will be imported as a historical invoice.

For more information about payment request imports, refer to *Invoice: Payment Request Import V2 (Current) Specification.*

Vendor Management

Planned Changes Create and Approve Vendors

Overview

In a future release, users with the appropriate role will be able to create and approve vendors within Invoice. Currently, users with the appropriate roles can create unapproved vendors by requesting a new vendor. When this feature becomes available, clients with the appropriate roles assigned to them will be able to create and approve new vendors within Invoice.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides clients with a more efficient way to get an approved vendor into Invoice without relying on the existing import and matching processes.

Configuration / Feature Activation

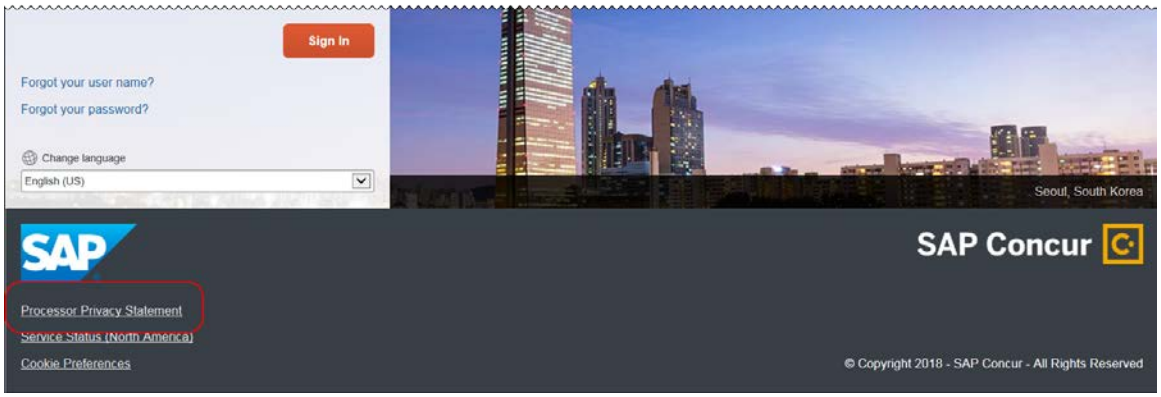
This feature is enabled by default. You can request that it be disabled for your company by contacting your Concur administrator.

Privacy Statement

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

Overview

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



However, not all pages in SAP Concur display the footer. If the link is not displayed, return to the Home page and click the **Processor Privacy Statement** link there.

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

Configuration / Feature Activation

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

Concur Open

Planned Changes Personalized Concur Open

Overview

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

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

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

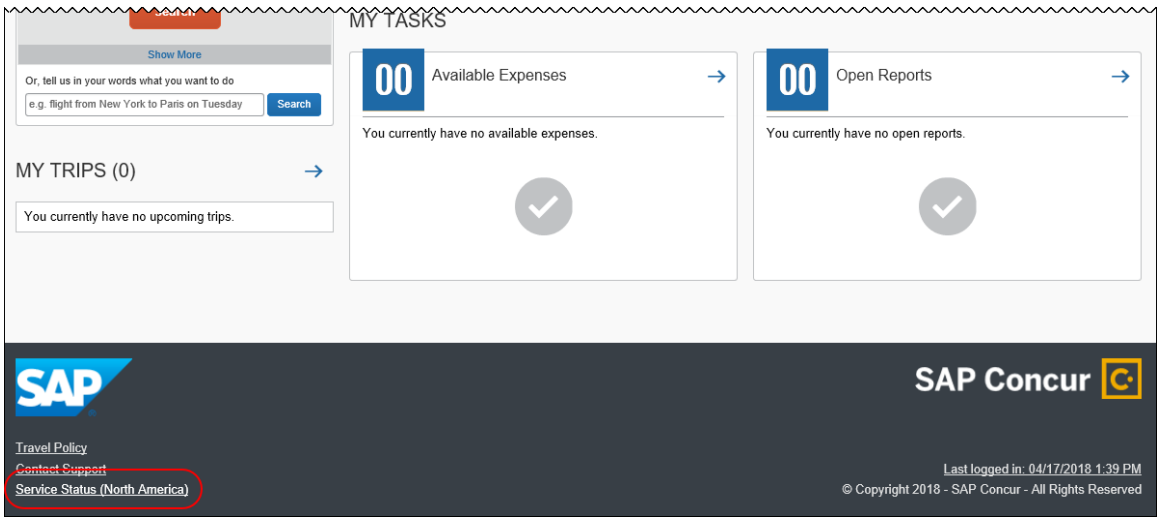
BUSINESS PURPOSE / CLIENT BENEFIT

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

What the User Sees – Access Concur Open

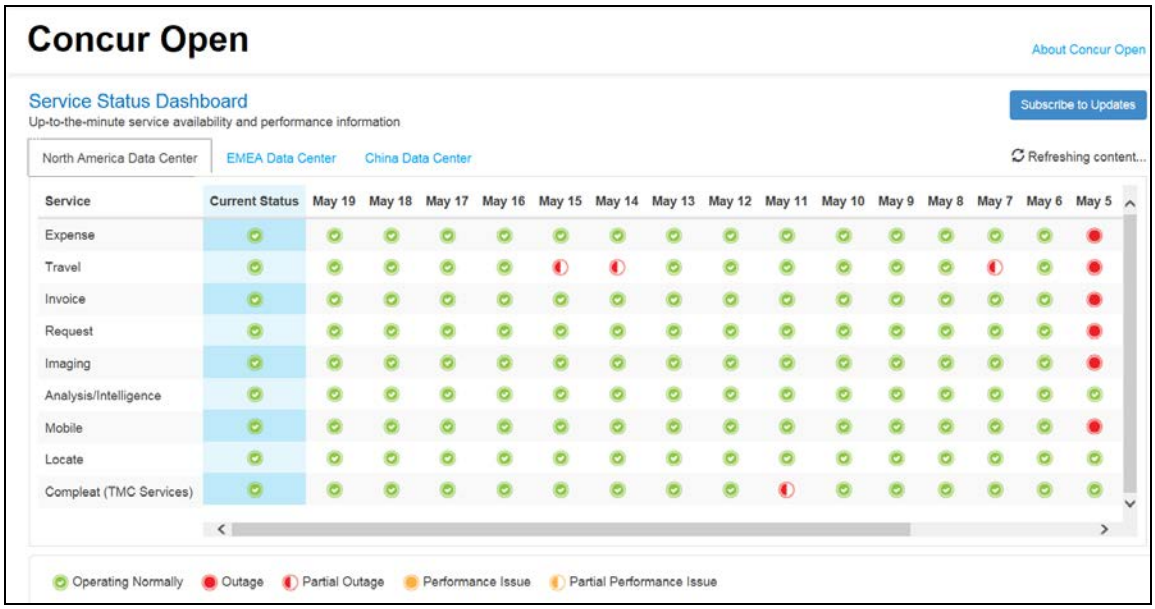
Users can access Concur Open in two ways:

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



Concur Open appears.

What the User Sees – Current View

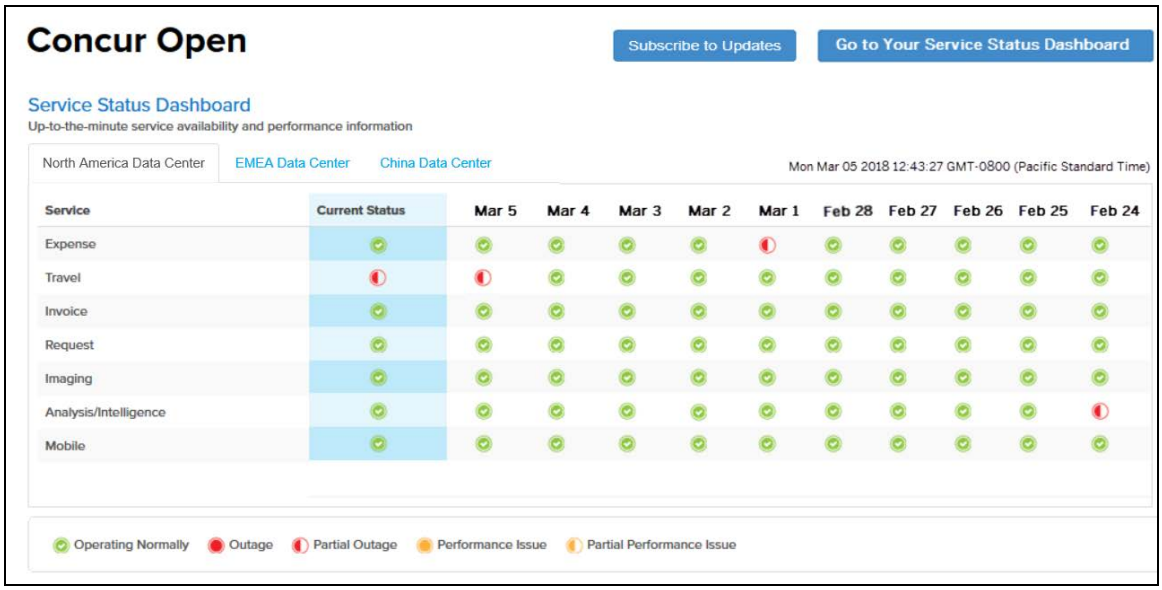


The user sees the data center tabs, the service activity (up to the previous 20 days), the legend (bottom of the page), and the **Subscribe to Updates** button (upper-right corner). The user can click **Subscribe to Updates** to request notifications for service and incident changes.

What the User Sees – New View and Process

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

Regardless of how it is accessed, the initial page is similar to the existing page.



The user can see all data centers and services and can use the **Subscribe to Updates** button. This has not changed – anyone can access the public version (open.concur.com) and anyone can request notifications.

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

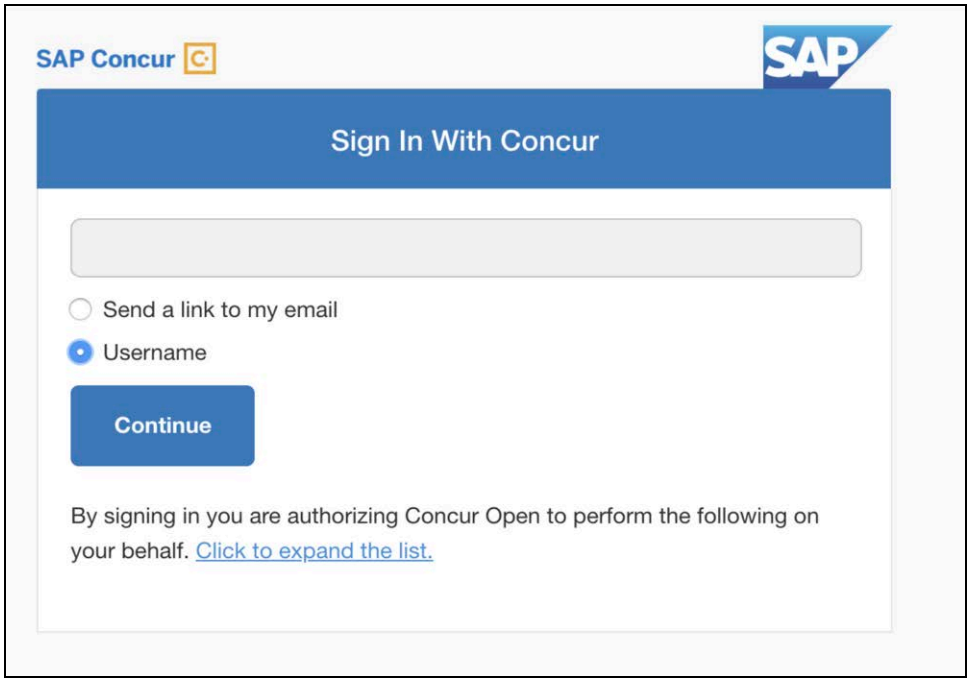
With the release of Personalized Concur Open, the **Go to Your Service Status Dashboard** button appears. Whether the user accesses Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page in order to see the personalized view requires an SAP Concur sign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

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username and password. Users use their existing SAP Concur credentials.

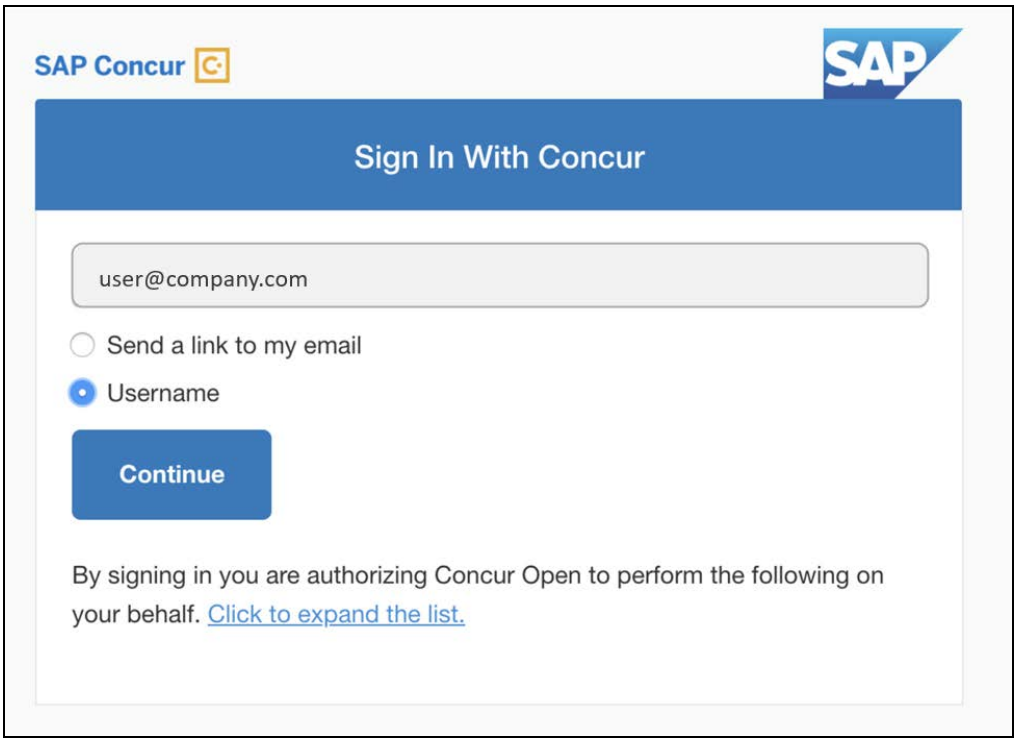
- For customers that do not use SSO, users sign in with their SAP Concur username and password.
- For customers that do use SSO, users can access the personalized view using their email address (described below).

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



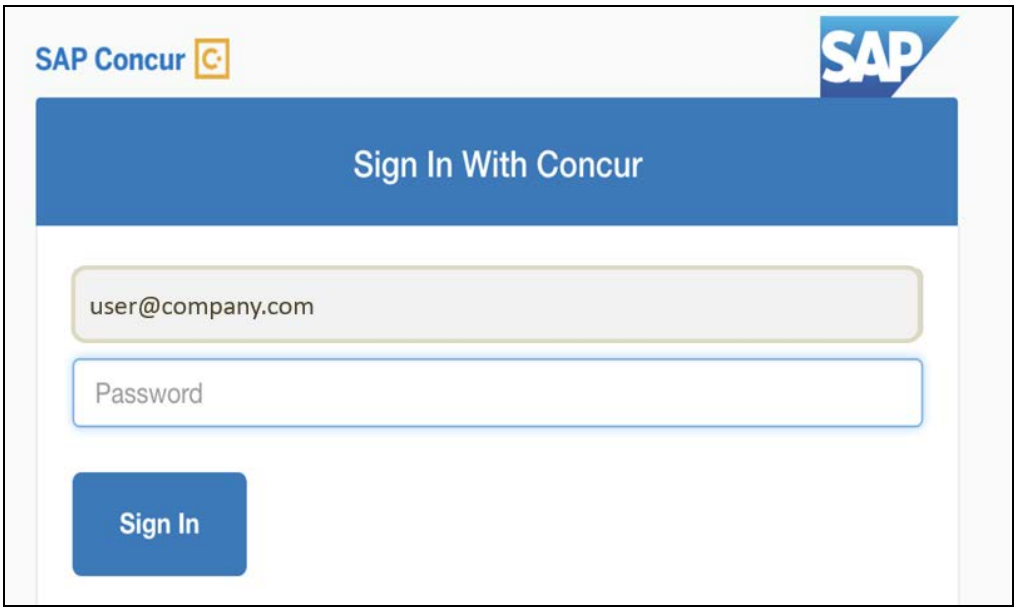
Then, depending on the customer's implementation of SAP Concur:

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



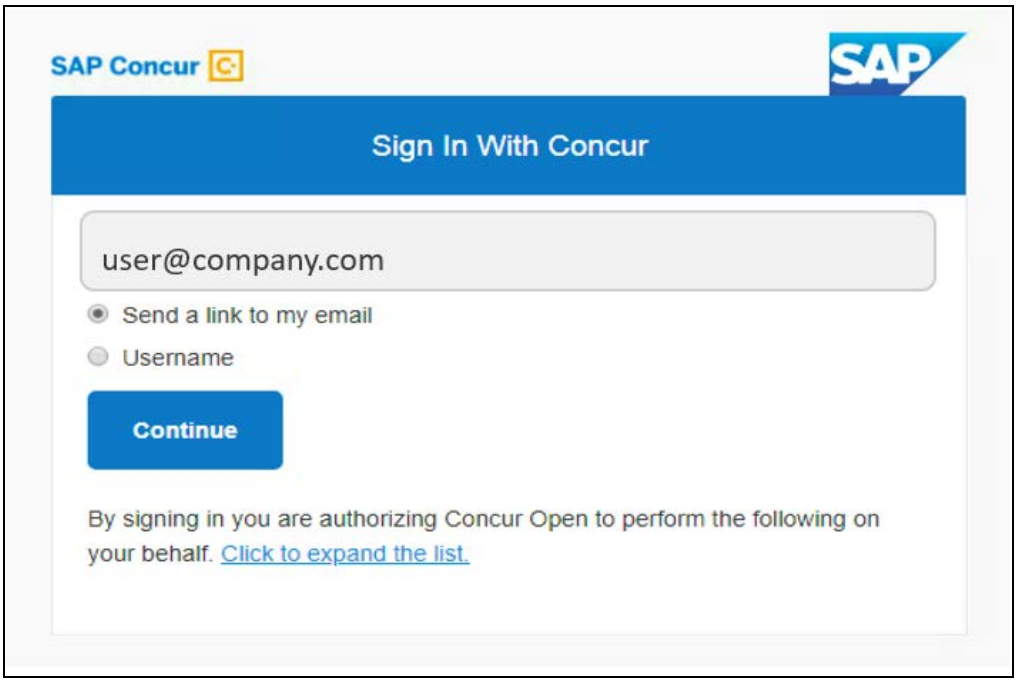
Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**.

The following page appears.



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

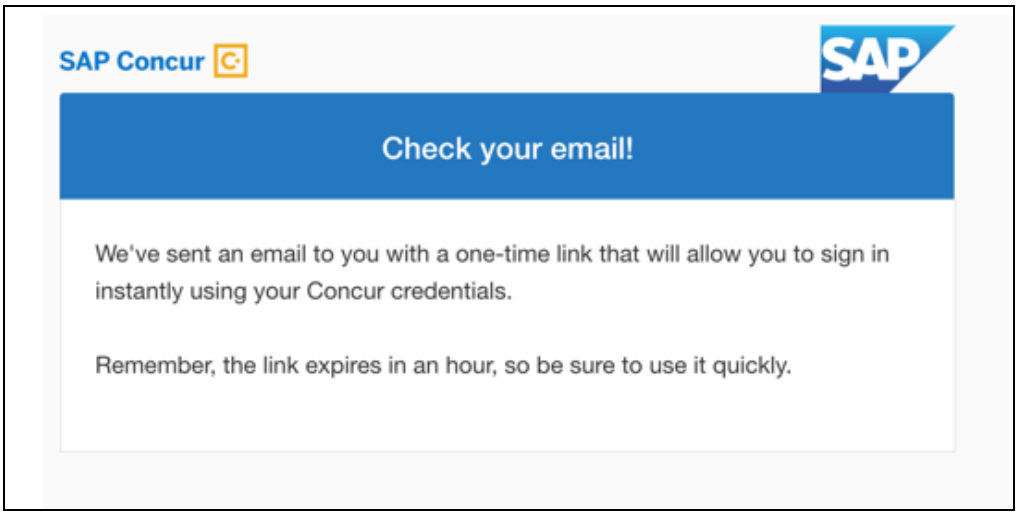
- **SSO:** If the user does not know their SAP Concur sign-in credentials, for example, the user's company uses SSO to access SAP Concur services:



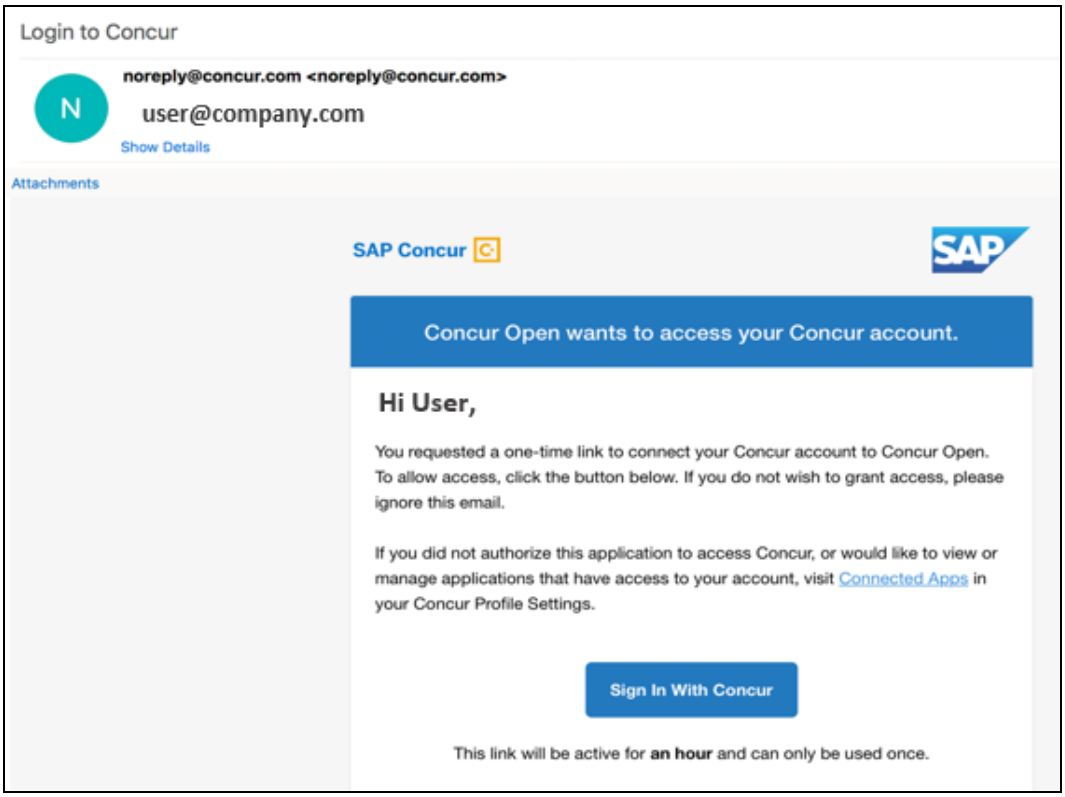
Then, on this page, the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.

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

The following message appears:



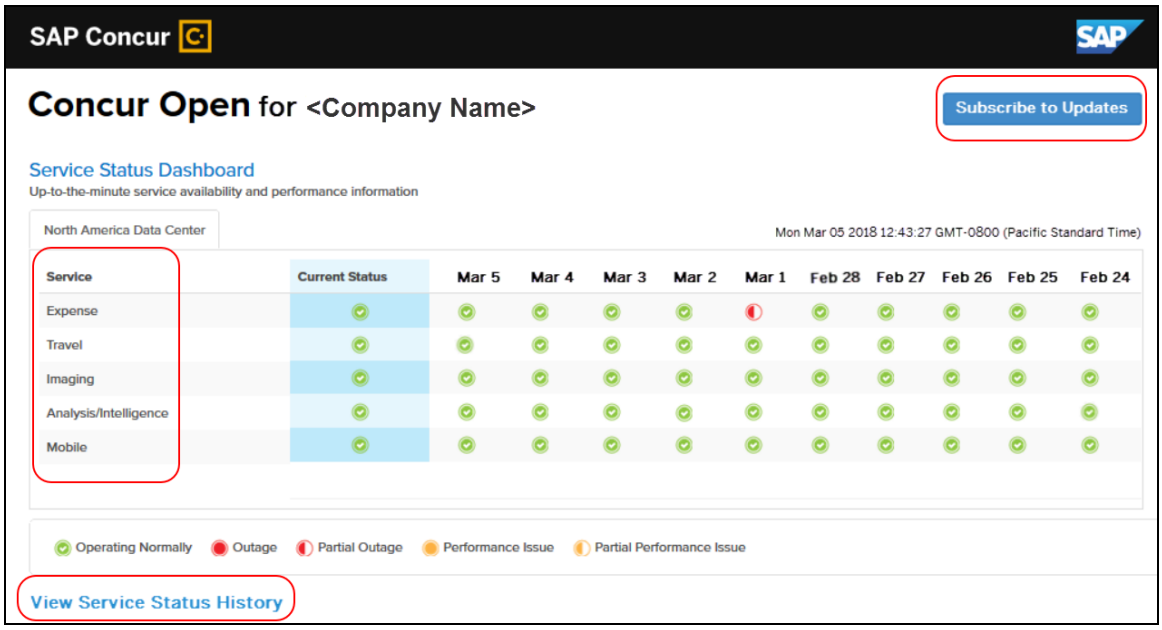
An email similar to the following is sent to the email address.



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

NOTE: The one-time link is active for one hour. If the user closes the browser, the user must request another one-time link.

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

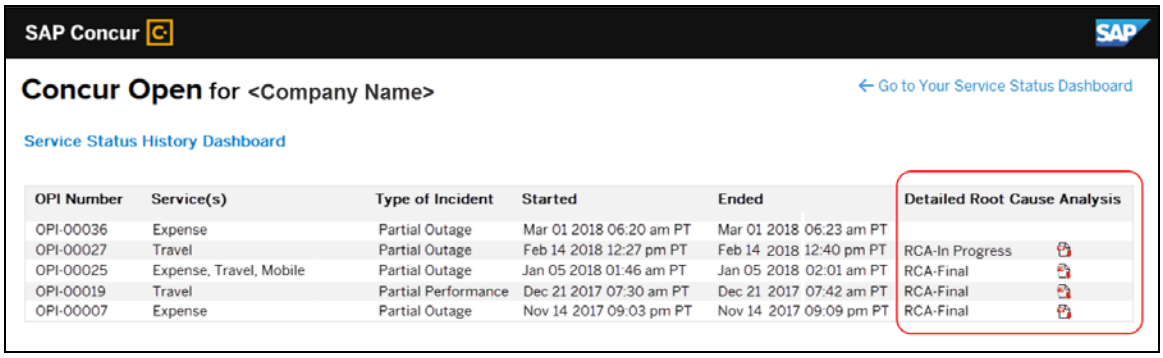


On the **Service Status Dashboard** page, the user can:

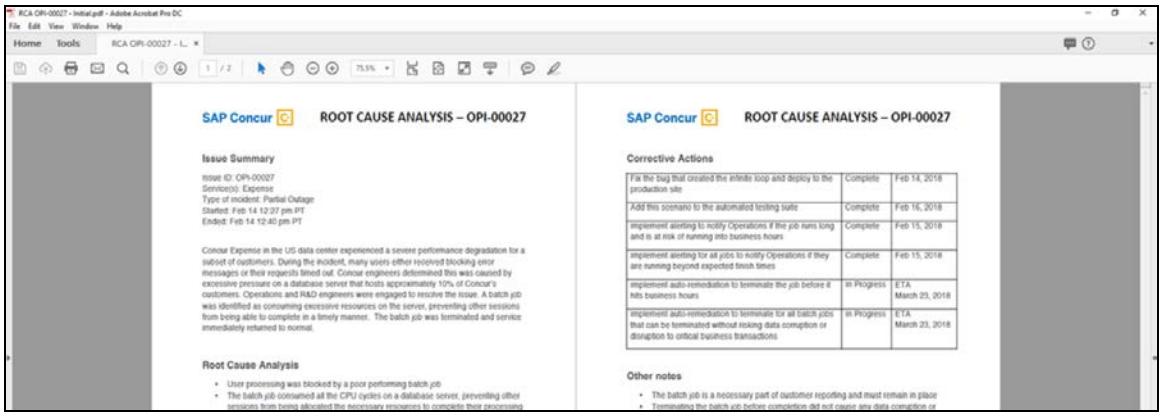
- View the following:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur is employing existing "targeting" logic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

VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

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



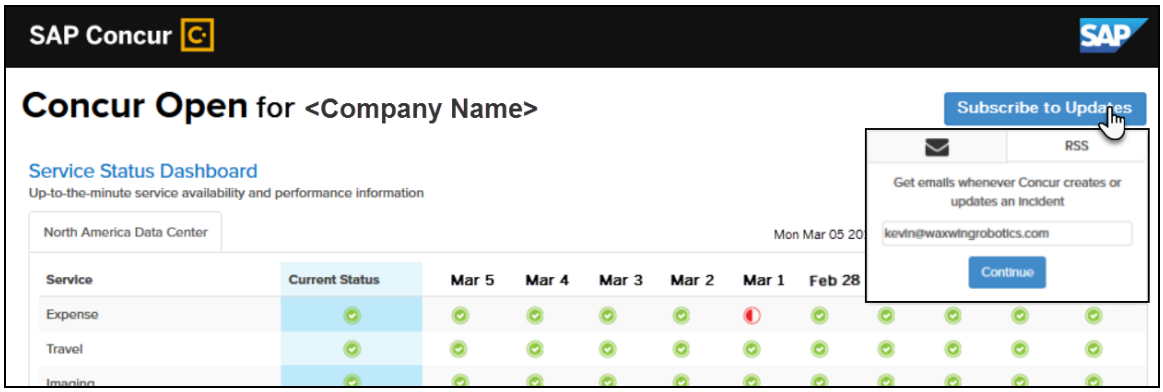
The user clicks the PDF icon in the **Detailed Root Cause Analysis** column to view the root cause information for each incident.



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

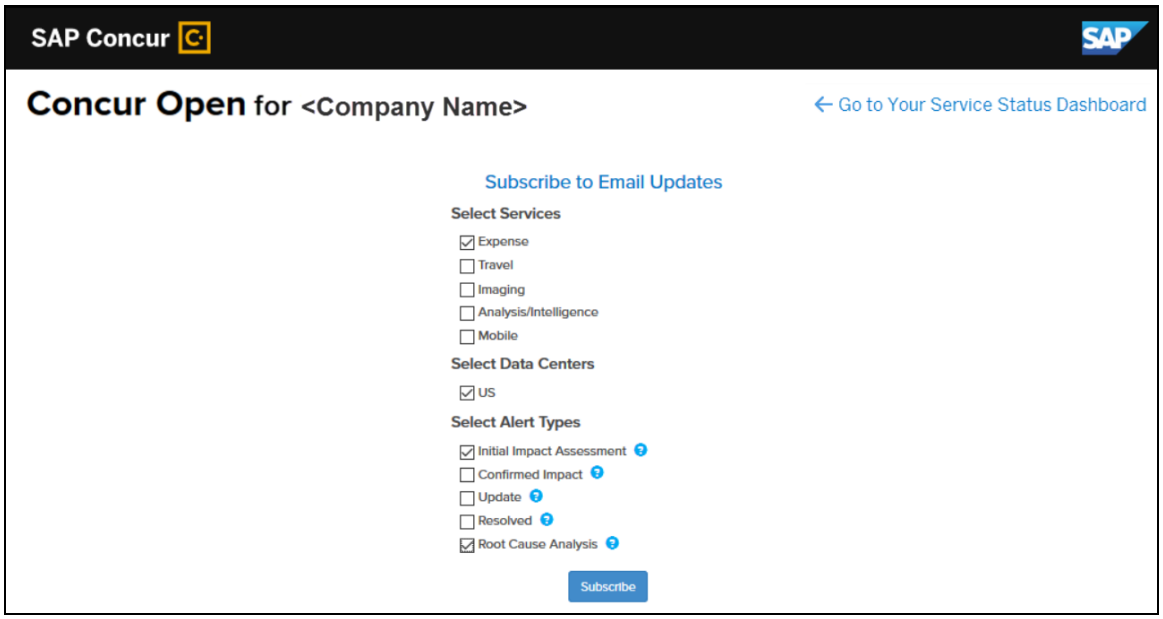
SUBSCRIBE TO UPDATES

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

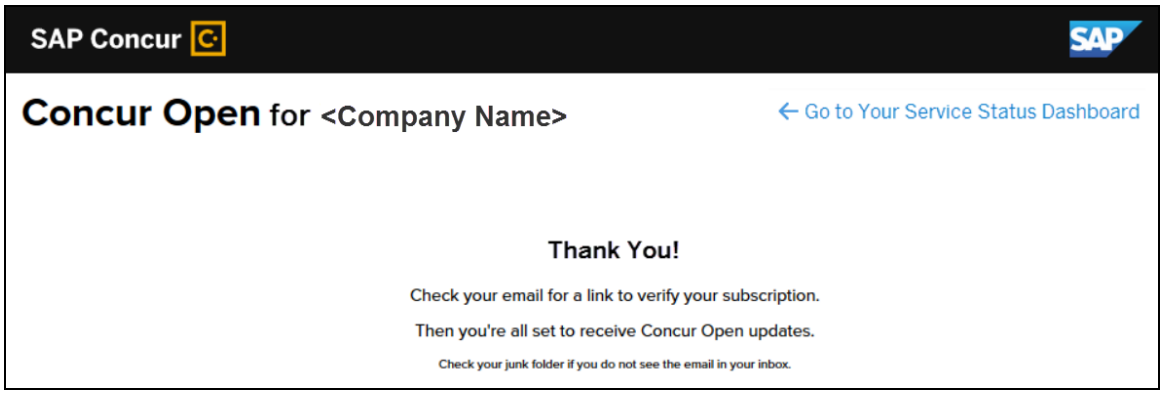


To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address. The user can enter only one email address. It can be the email address associated with their Concur profile, their personal email address, or any other email address.

The user clicks **Continue**. A page similar to the following appears.



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



Existing Subscription Information

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

Note the following:

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

  NOTE: After the new view is available, it is considered best practice to sign in to the subscription page and verify the selected options for accuracy.

- If a user subscribed using their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user experience will remain unchanged and the subscription will not be personalized.

Configuration / Feature Activation

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

Plain Text FTP Support

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

Overview

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

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

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

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

What This Means – The Client Experience

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

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

Client Notifications

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

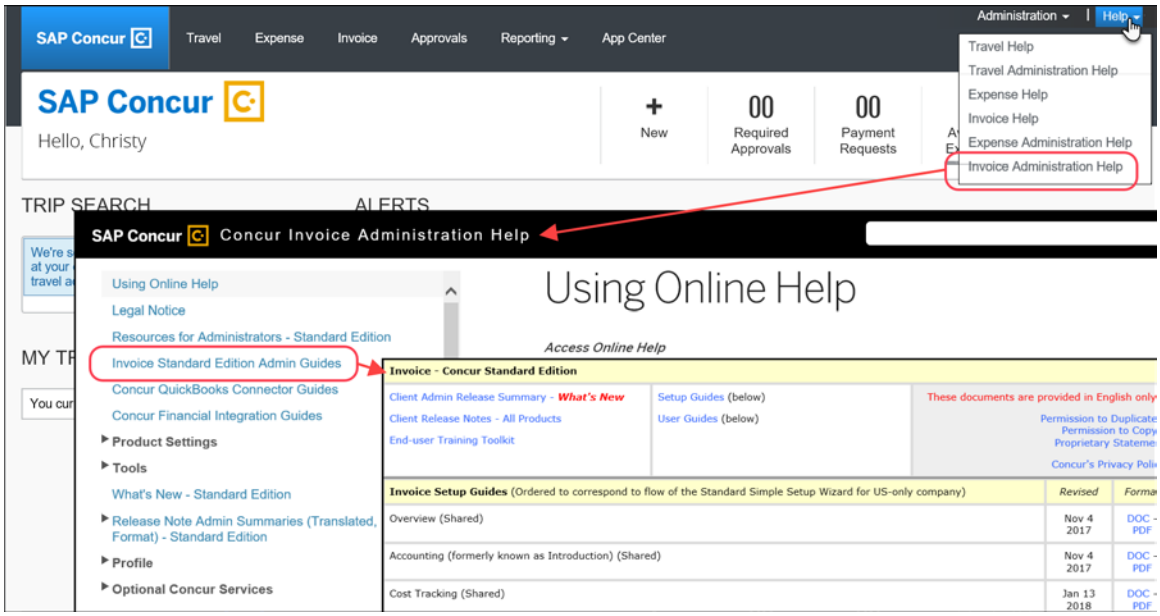
The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

A user who is assigned an admin role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through **Invoice Administration Help**.

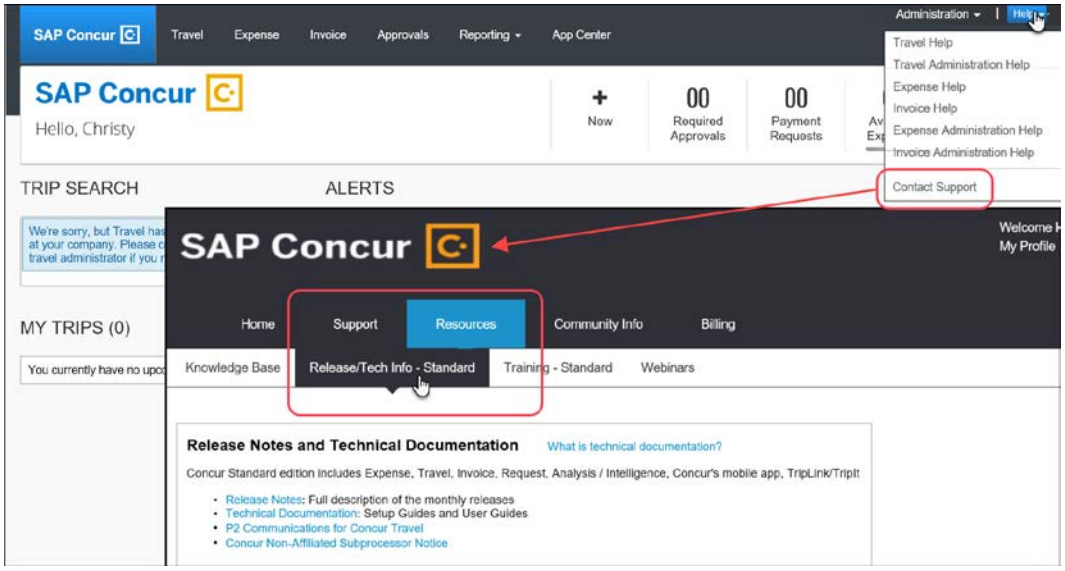


Concur Support Portal – Selected Users

Users who are assigned the correct Concur Support Portal permissions can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through the Concur Support Portal

To access the Concur Support Portal (for users with the correct permissions):

1. Click **Help > Contact Support**.
2. On the support page, click **Resources > Release/Tech Info**.



SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: July 21, 2018 Update #2: Monday, September 24 3:00 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Invoice functionality for Concur Professional edition.

Invoice

New User Interface for Invoice available in Early Access Release

Overview

SAP Concur has introduced the first version of a new user interface for Invoice clients. Version 1.0 of the new user interface is targeted at the Accounts Payable (AP) user who is constantly monitoring the health of the Invoice lifecycle within the system. With a new AP landing page, concepts of "call to action" and "work to zero" are being brought to the forefront to better inform AP to ensure they are working on the highest priority task.

NOTE: The new user interface for Invoice is available to designated clients in Early Access release. This new interface is not related to Next Generation Expense and will be made generally available on a separate timeline after the Early Access phase is completed. Contact your SAP Concur representative for more information about enabling this feature.

BUSINESS PURPOSE / CLIENT BENEFIT

The new Invoice user interface enables clients to work more efficiently and provides them greater visibility into their invoices in flight.

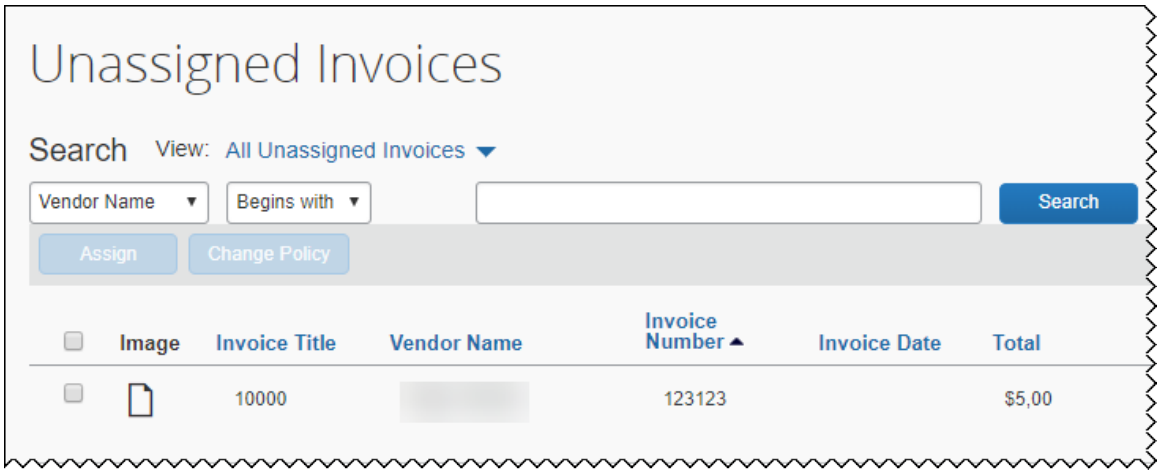
WHAT THE INVOICE AP USER AND INVOICE PROCESSOR SEE

The Invoice AP User and the Invoice Processor will now land on a new **Invoice Manager** page that provides key information about all active invoices.

On the **Invoice Manager** tab, the user sees new tiles and new sections including visibility into **Active Invoices** and **My Tasks** sections.

The Invoice Processor also sees a newly designed **Unassigned Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.

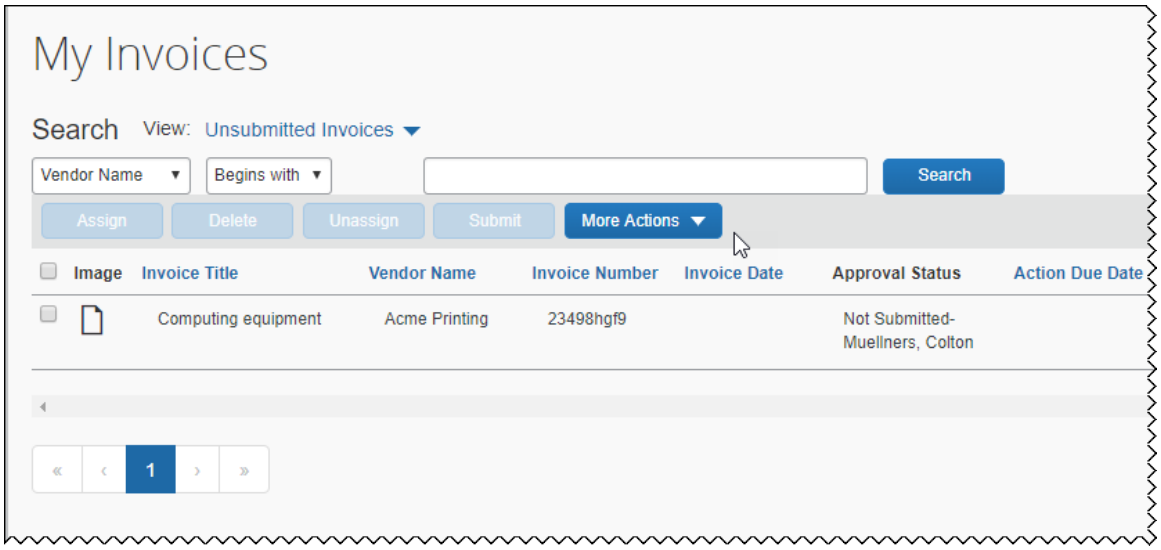
Unassigned Invoices



WHAT THE INVOICE USER SEES

Invoice users who currently have access to **My Requests**, will see a newly designed **My Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.

My Invoices



Configuration / Feature Activation

This feature is available in **Early Access** release and is enabled by SAP Concur for designated clients. Contact your SAP Concur representative for more information about enabling this feature.

NOTE: More information about the new Invoice user interface will be made available in future release notes.

Invoice Import

Import Historical Invoices

Overview

Support for a new record type has been added to the *request_comma_delimited_v2.xml* invoice import definition file. The new record type, 210, provides a new way to import historical invoices into Concur Invoice.

NOTE: This enhancement provides an alternative method for importing historical invoices into Concur Invoice Professional. It does not replace the previous method.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables clients to import invoices that have already been processed. For example, new SAP Concur clients can import invoices that were processed by a previous system.

Configuration / Feature Activation

This change is automatically available to clients who use the *request_comma_delimited_v2.xml* invoice import definition file. The 210 record type can be set to true or false. If the record type is set to true, the affected invoice will be imported as a historical invoice.

For more information about payment request imports, refer to *Invoice: Payment Request Import V2 (Current) Specification.*

Invoice Export

Tax Code Fields Available for Invoice File Export

Overview

For clients that have the Invoice File Export feature enabled, the following new fields can now be added when the Invoice Admin defines the file export header and details:

- Prorated VAT Amount 1
- Prorated VAT Amount 2
- Prorated VAT Amount 3
- Prorated VAT Amount 4

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables clients who use these tax codes to include them in the Invoice export.

What the Invoice Admin Sees

The Invoice Admin sees the new fields on the list of fields that are available to add to the export header and details.

To add the new fields to the Invoice file export header:

1. Click on **Administration > Expense and Invoice Settings**. On the Connections tile, click **Show Advanced Setting**, and then click **Invoice File Export**.
2. Click on **5 Define Header**.
3. Under **Select Header Fields**, select the fields you want to add to the header, and then click **Add**.
4. (Optional) Click on **7 Summary** to review the fields that are selected for inclusion in the export file.

To add the new fields to the Invoice file export details:

1. Click on **Administration > Expense and Invoice Settings**. On the Connections tile, click **Show Advanced Setting**, and then click **Invoice File Export**.
2. Click on **6 Define Details**.
3. Under **Select Invoice Detail Fields**, select the fields you want to add to the header, and then click **Add**.
4. (Optional) Click on **7 Summary** to review the fields that are selected for inclusion in the export file.

Configuration / Feature Activation

The new fields are automatically available for addition to the export header and details.

Vendor Management

Create and Approve Vendors

Overview

Users with the Vendor Manager role can now create and approve vendors within Invoice. Previously, users with the appropriate roles could create unapproved vendors by requesting a new vendor. With this release, clients with the Vendor Manager role assigned to them can create and approve new vendors within Invoice.

For more information, refer to the *Invoice Standard Create and Approve Vendors Feature* fact sheet.

NOTE: As part of the Create and Approve Vendors feature Concur logs audit trail data for any activity that occurs in the user interface. In a future release, clients will be able to view this audit trail data through the user interface.

BUSINESS PURPOSE / CLIENT BENEFIT

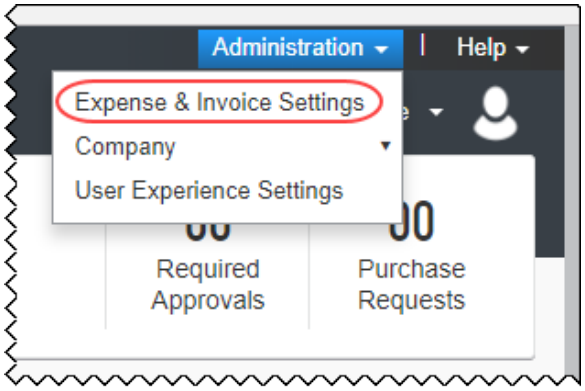
This feature provides clients with a more efficient way to get an approved vendor into Invoice without relying on the import and matching processes.

Configuration / Feature Activation

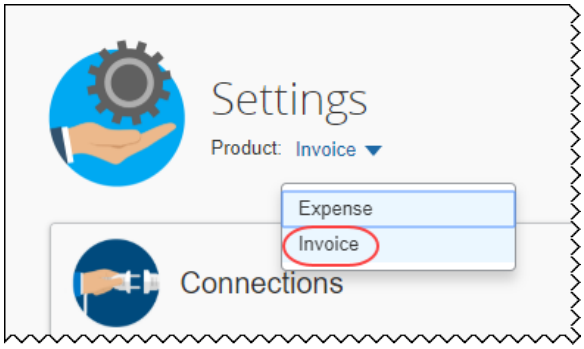
This feature is enabled by default. The feature can be disabled by the Invoice Admin.

▸ ***To disable the Invoice Create and Approve Vendors feature:***

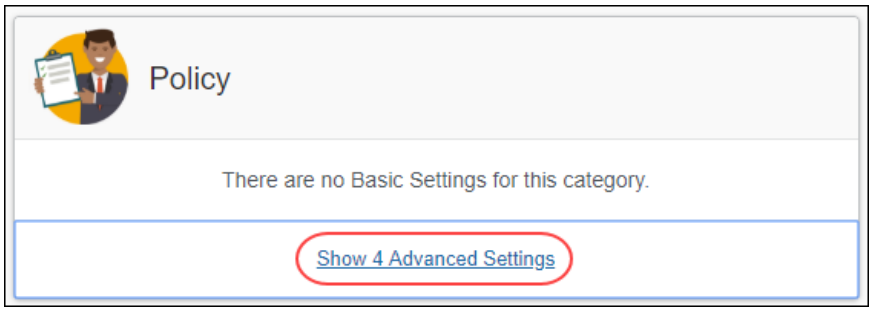
1. Click **Administration > Expense & Invoice Settings**.



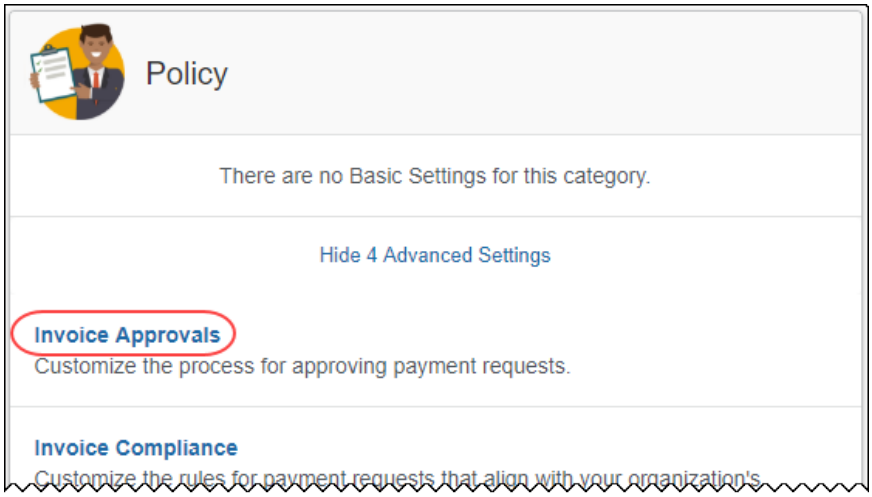
2. Under **Settings**, select **Invoice**.



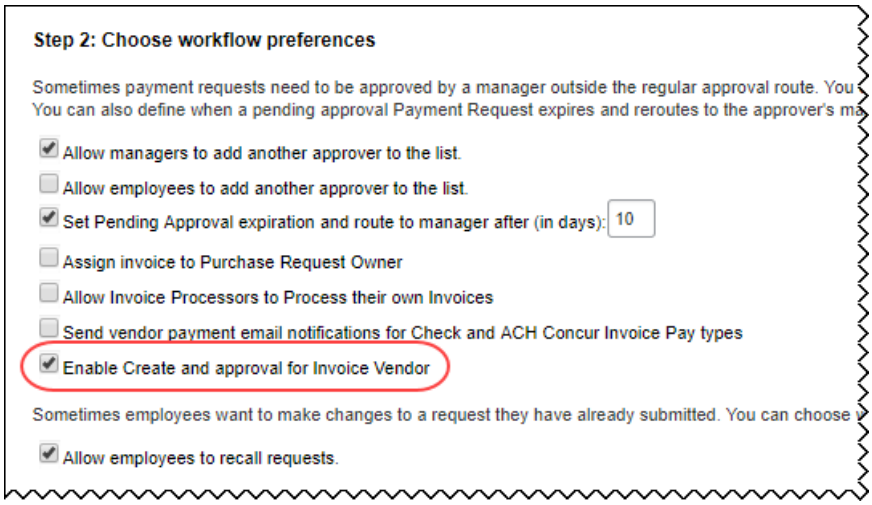
3. Click **Show Advanced Settings** on the **Policy** tile.



4. Click **Invoice Approvals**.



5. On the **Approval Routing** page, under **Step 2: Choose workflow preferences**, uncheck the **Enable Create and approval for Invoice Vendor**.



Product Settings

New Edit List Page in Cost Tracking

Overview

A new **Edit List** page has been added to the **Cost Tracking** page in Product Settings. The **Edit List** page replaces the **List Items** tab and provides better usability. The **Edit List** page retains the same functionality for adding, importing, editing, and deleting list items.

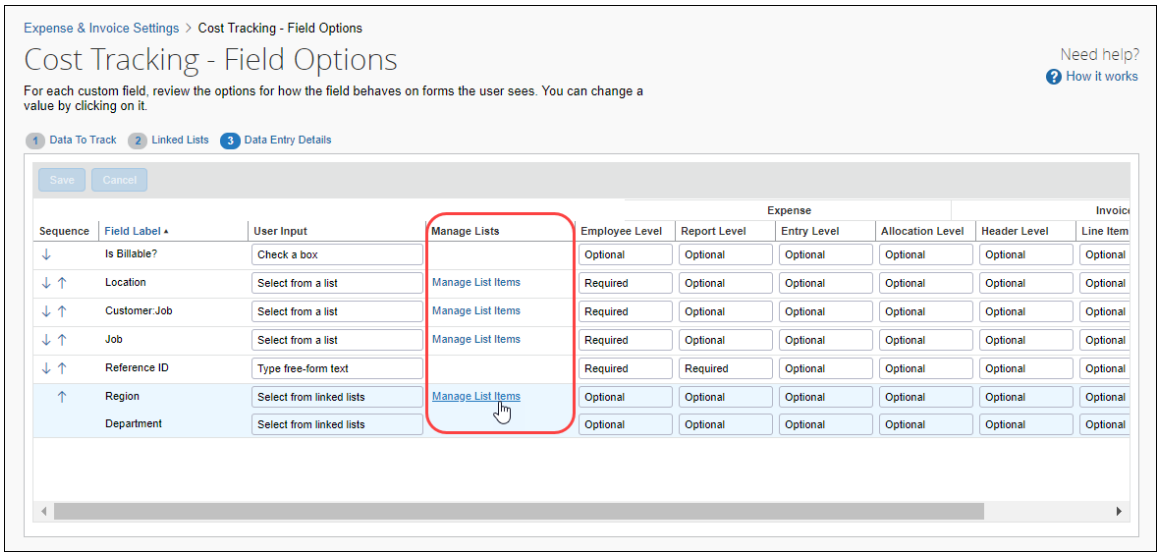
NOTE: The **Edit List** page displays as the **View List** page when list values are imported from QuickBooks for the QuickBooks Class, Customer, and Location fields.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves list item management by providing a better user experience.

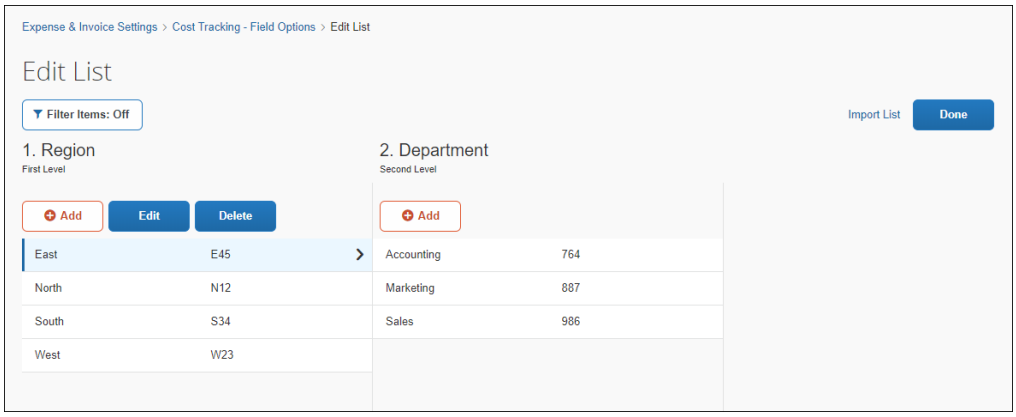
What the Admin Sees

On the **Cost Tracking – Field Options** page, a new **Manage Lists** column displays on the **Data Entry Details** tab. Click **Manage List Items** to access the **Edit List** page. The **Edit List** page appears.

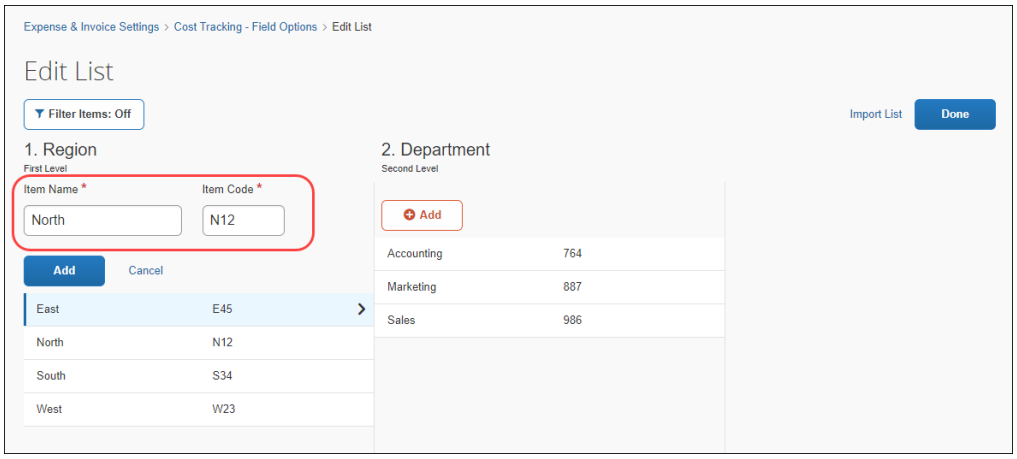


CONFIGURE LIST ITEMS

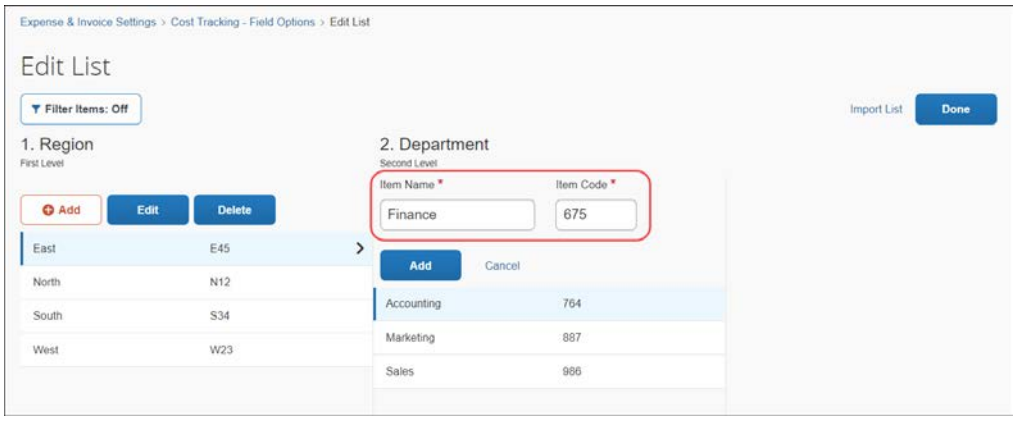
The **Edit List** page allows you to add, import, edit, and delete list items.



Click **Add** to display the **Item Name** and **Item Code** fields.

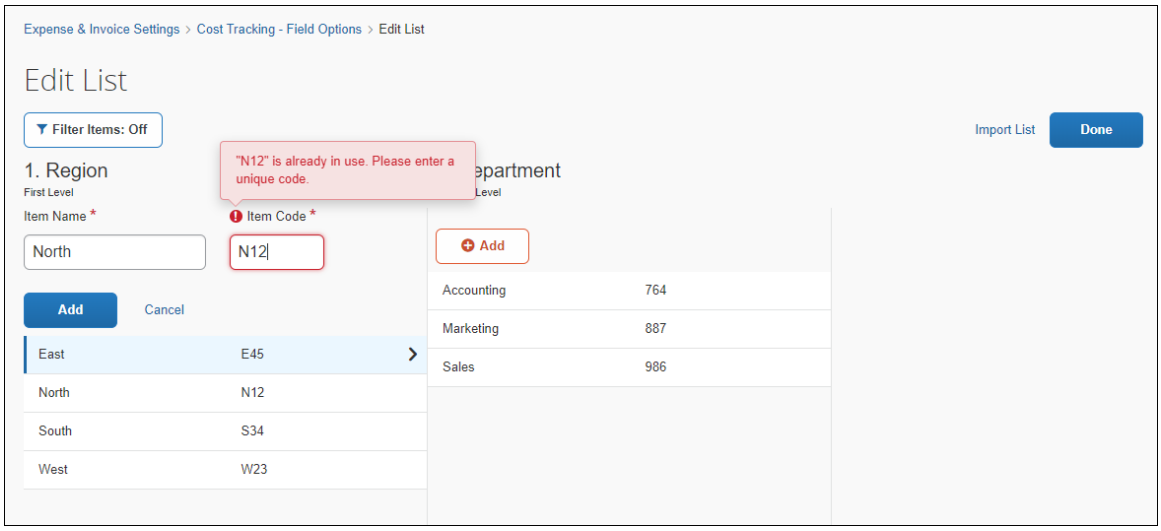


If you're adding an item to a sub-level list, such as Department (shown as the level two list in the following image), you must first select the parent item on the left to display the sub-level or multi-level list where you want to add an item. Next, click the **Add** button at the level where you want to add the list value.



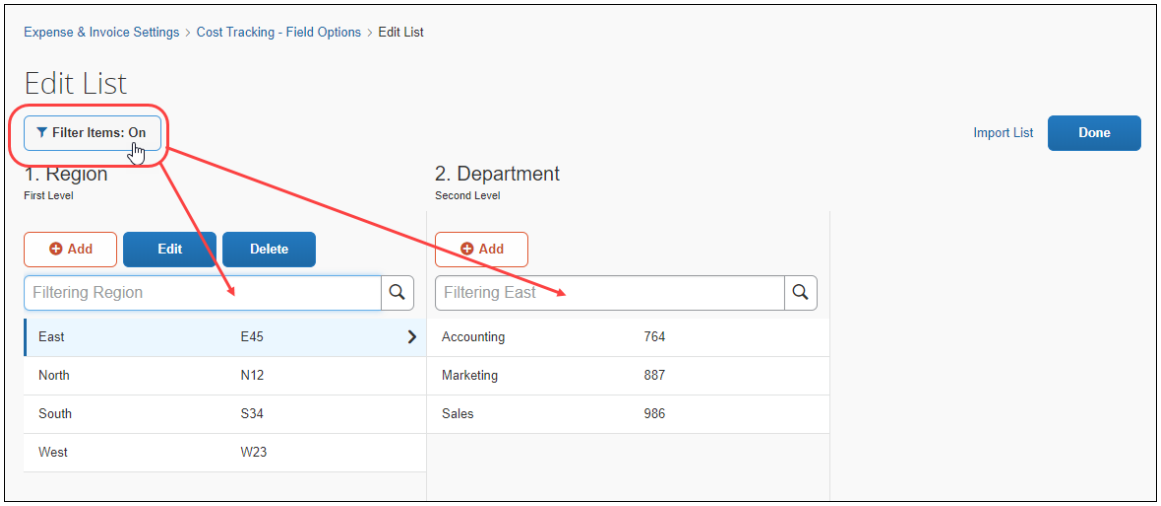
VALIDATION OF LIST ITEMS

The system displays a notification if an error or conflict occurs. For example, a message appears if an item name or code is already in use.



SEARCH LIST ITEMS

To search for a list item, click **Filter Items** to turn on search and display the search field.



Configuration / Feature Activation

This change is implemented automatically; there are no configuration or activation steps.

For more information, refer to the *Shared: Cost Tracking Setup Guide*.

Concur Open

(Targeted for the end of July) Personalized Concur Open

Overview

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

Targeted for the end of July, new functionality will be added to Concur Open. Users can continue to access Concur Open and view Concur service availability; no functionality will be removed. However, with the release, SAP Concur users will be able to log in to Concur Open and:

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

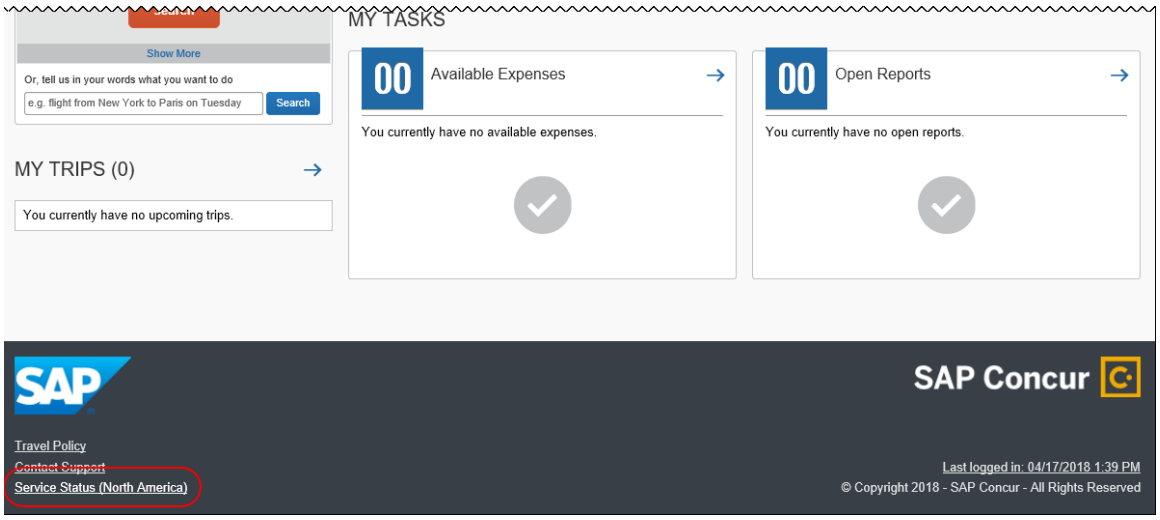
BUSINESS PURPOSE / CLIENT BENEFIT

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

What the User Sees – Access Concur Open

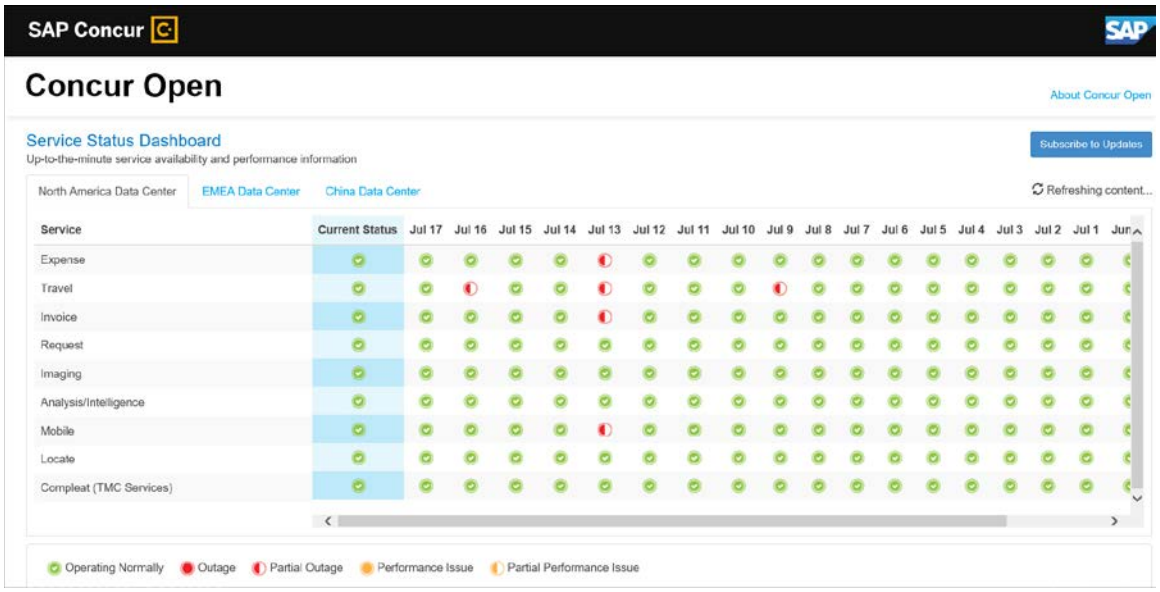
Users can access Concur Open two ways:

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



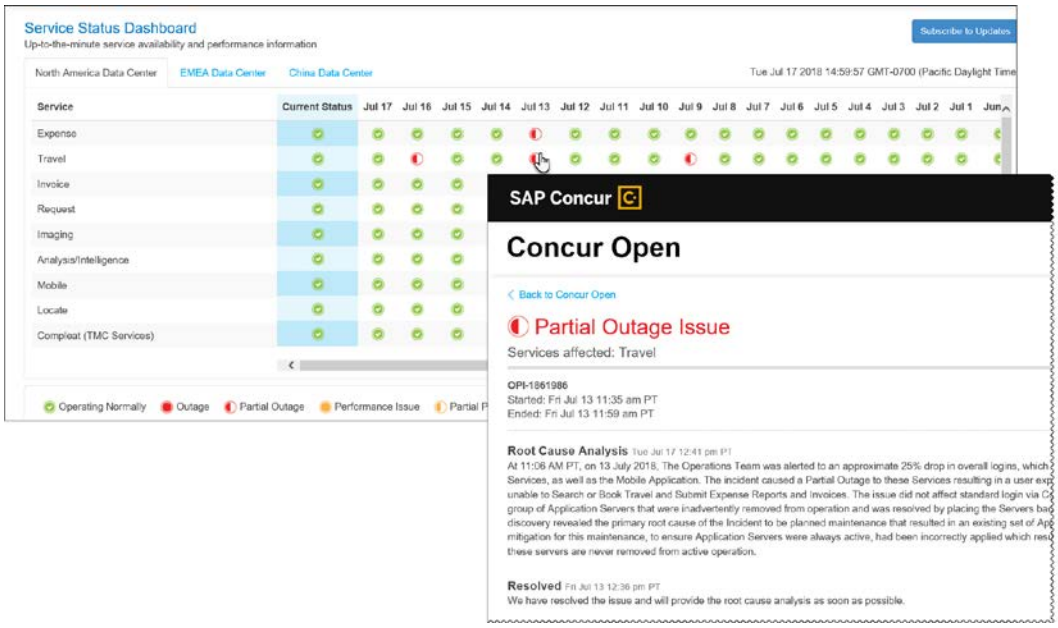
Concur Open appears.

What the User Sees – Current View



Currently, the user sees all data center tabs, the service activity (up to the previous 20 days), and the "service" legend (bottom of the page).

The user can click an icon to review information about service activity.

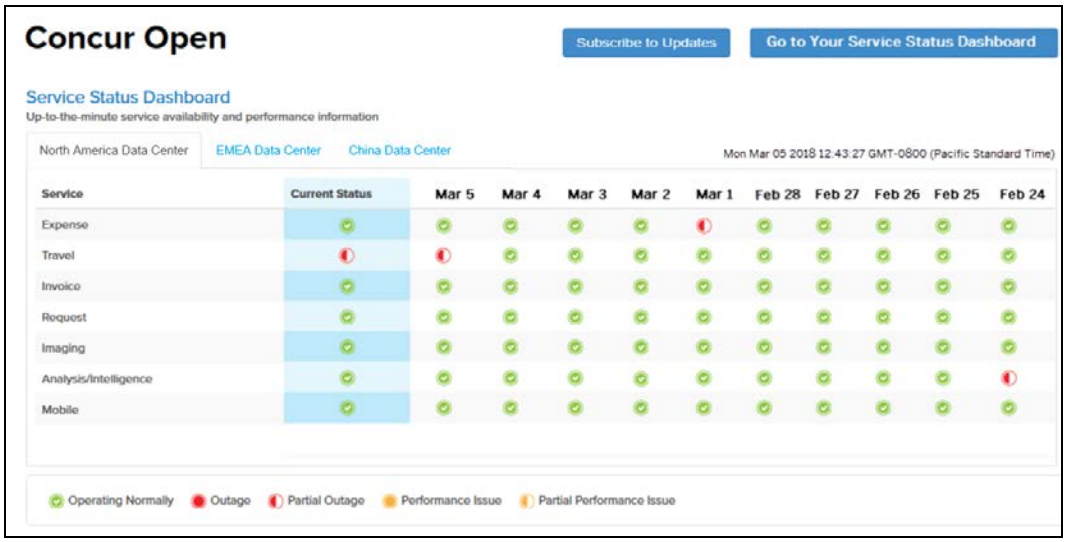


The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New View and Process

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

Regardless of how it is accessed, the updated initial page is similar to the current page.



On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button. That will not change. Anyone can access the public version (open.concur.com) and anyone can request notifications.

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

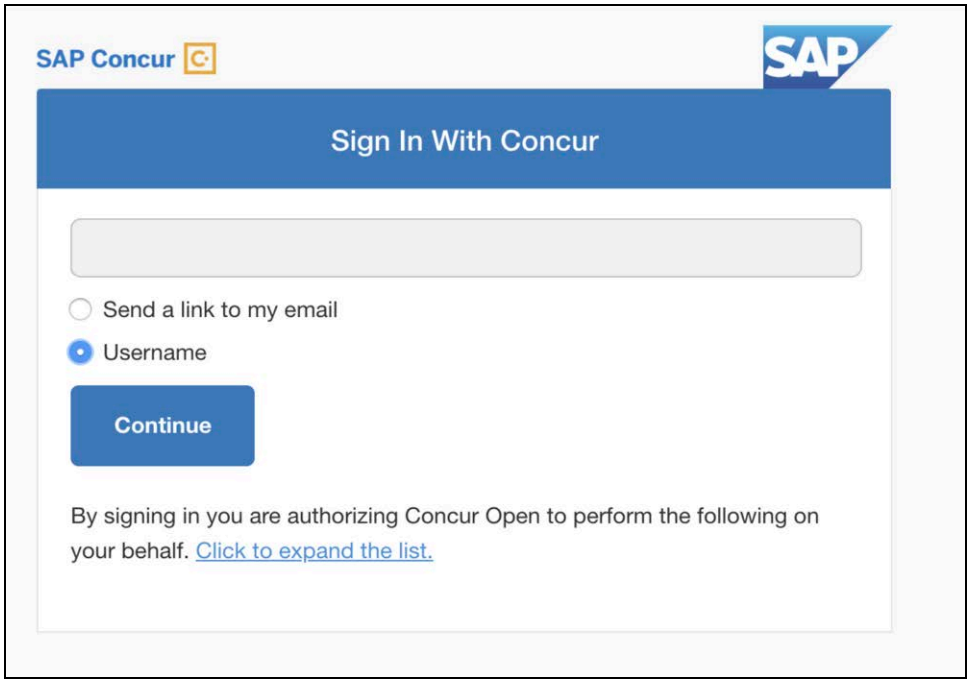
With the release of Personalized Concur Open, the main change is that the **Go to Your Service Status Dashboard** button also appears on the main page. Whether the user accesses Concur Open via the public site (open.concur.com) or after signing in to SAP Concur, moving beyond the main page to access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

SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Users sign in using their existing SAP Concur credentials.

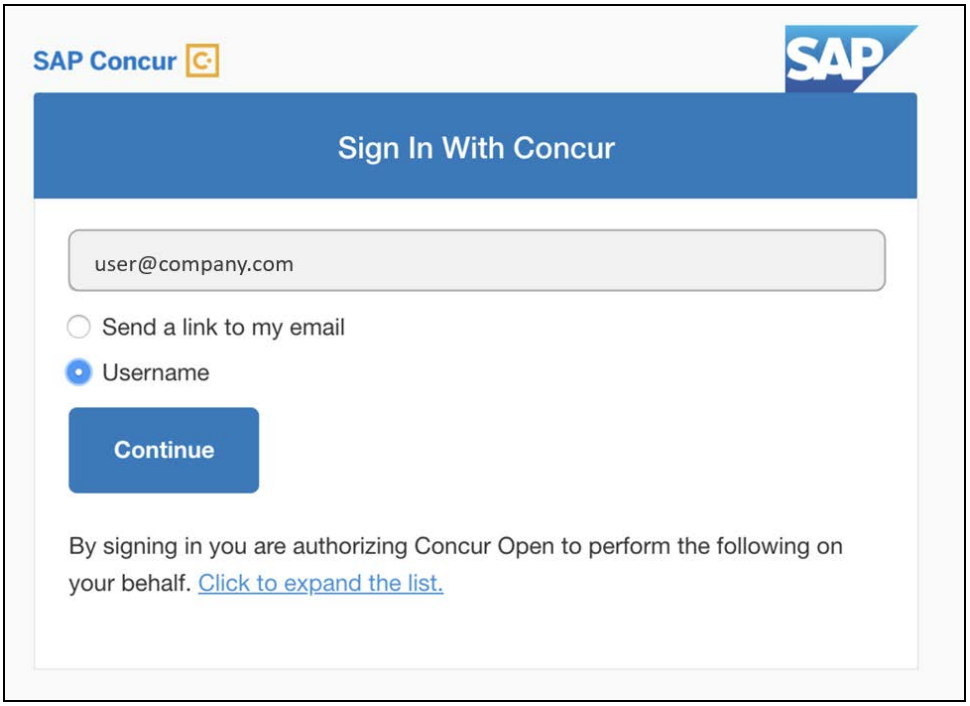
- For customers who do not use SSO, users sign in with their SAP Concur username and password.
- For customers who do use SSO, users can access the personalized view using their email address (described below).

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



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

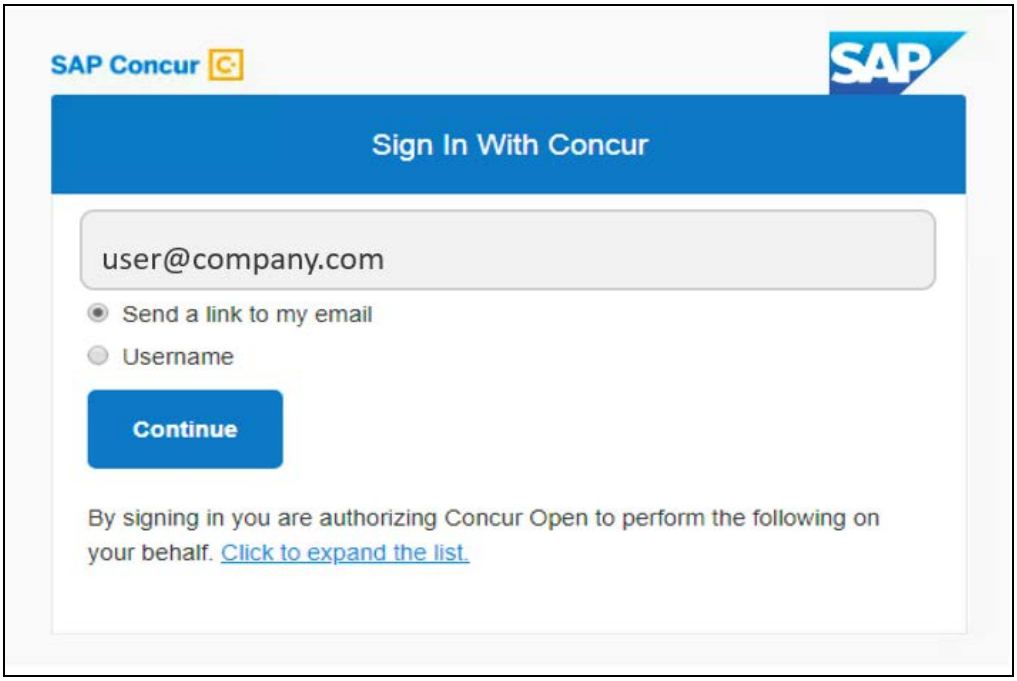
- **Username and password:** If the user signs in to SAP Concur using username and password:



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

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

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

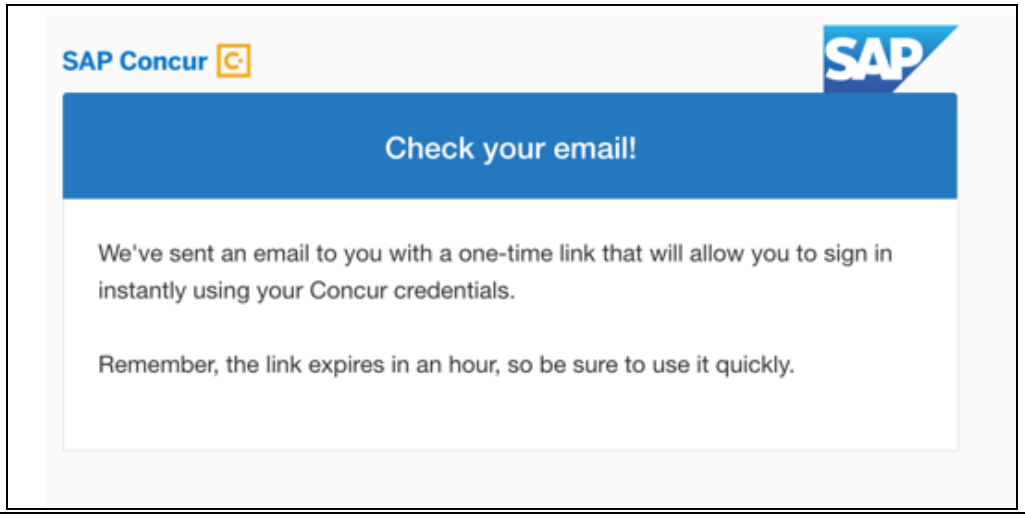


Then, on this page, the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.

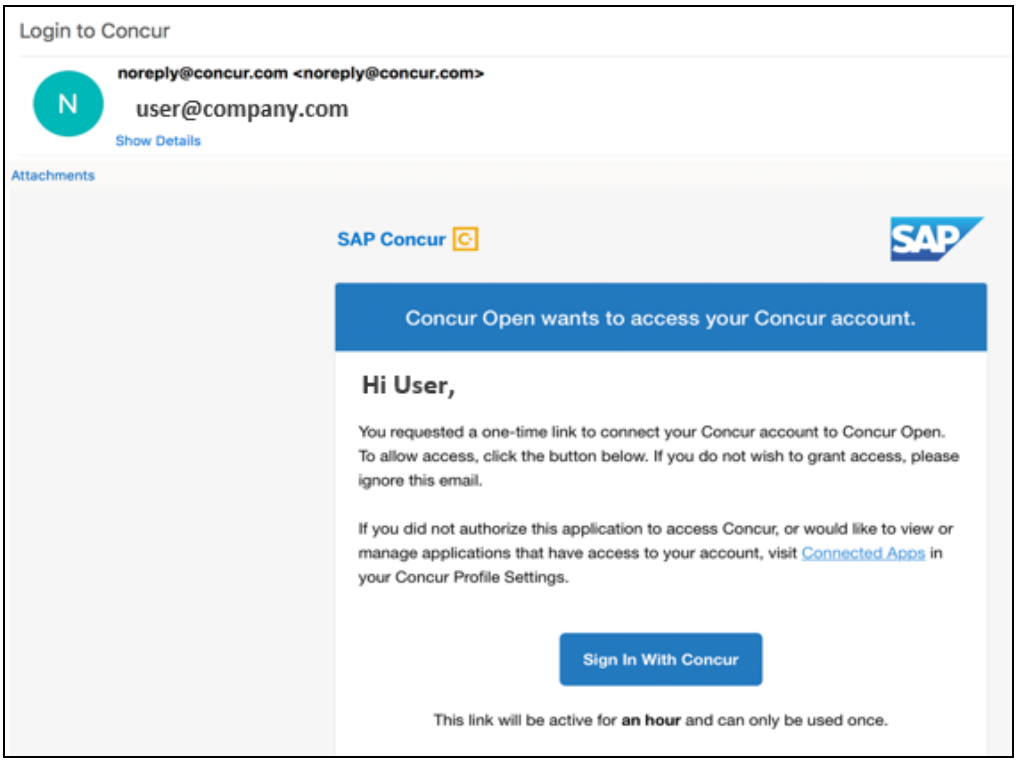
SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

📖 Refer to *More About Email Addresses in Profile* for more detail.

The following message appears:



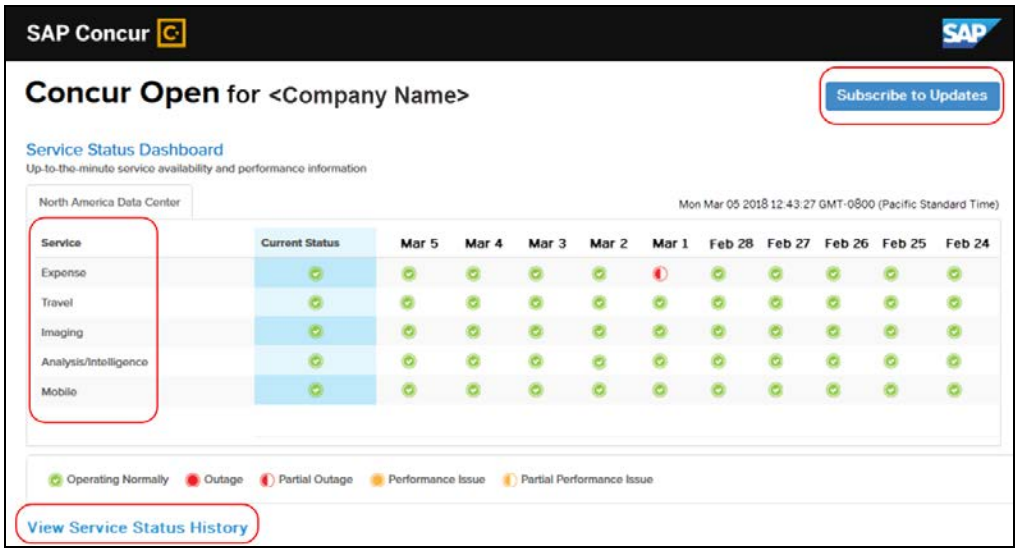
An email similar to the following is sent to the email address.



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

NOTE: The one-time link is active for one hour. If the user closes the browser, then the user must request another one-time link when they want to return to the personalized view.

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

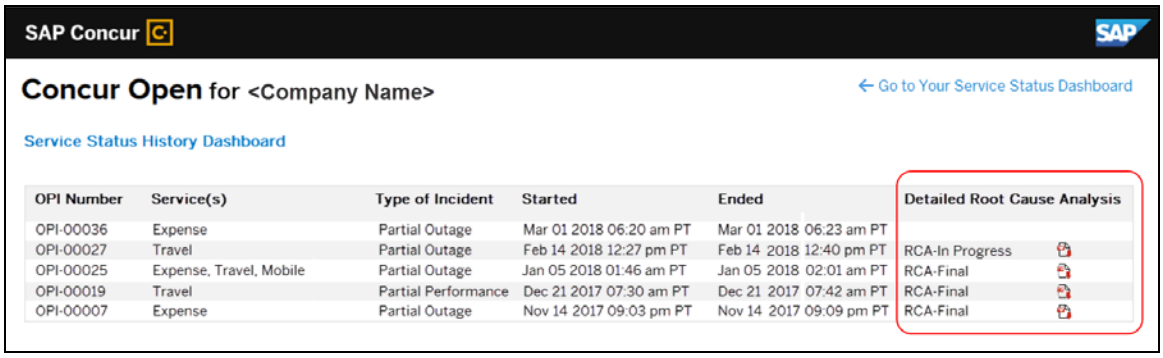


On this page, the user can:

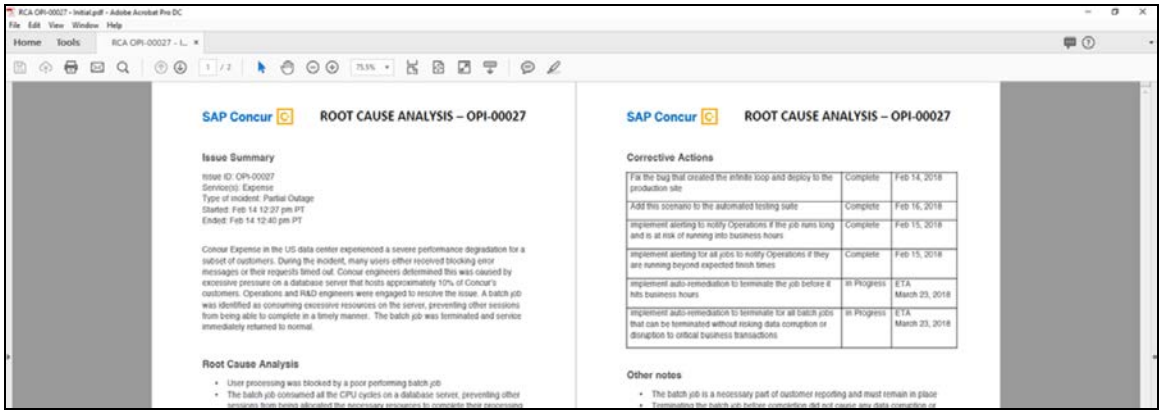
- View:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company.
- Subscribe to updates

VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

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



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

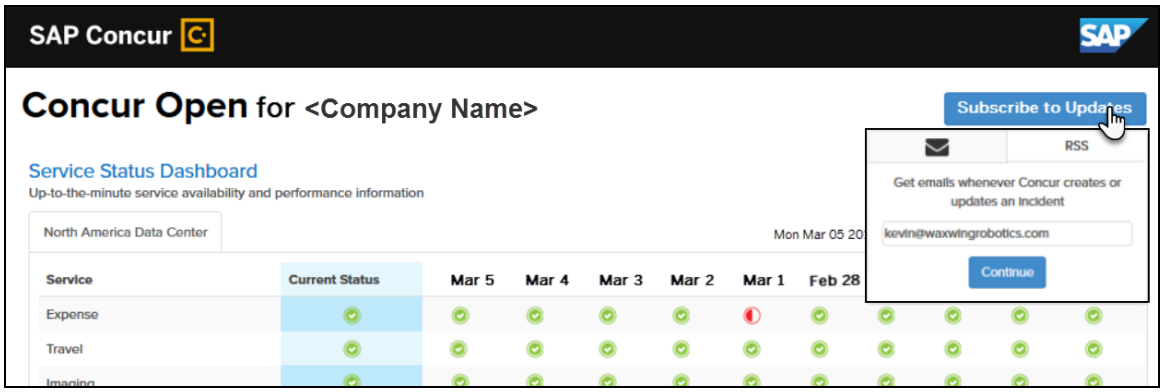


NOTE: Be aware that the root cause PDFs will be available starting around the date that the personalized view becomes available. Though service information (start/stop dates and times, type of incident, etc.) will be provided for the activity of the past two years, the PDFs will not; they will be provided on a *go-forward* basis.

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

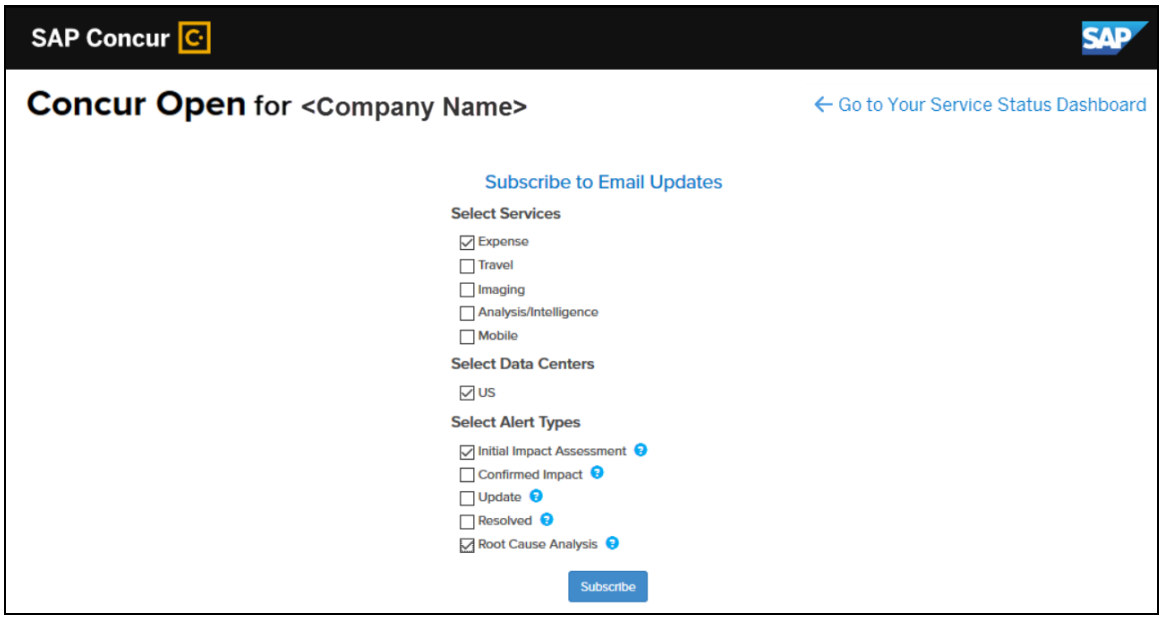
SUBSCRIBE TO UPDATES

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



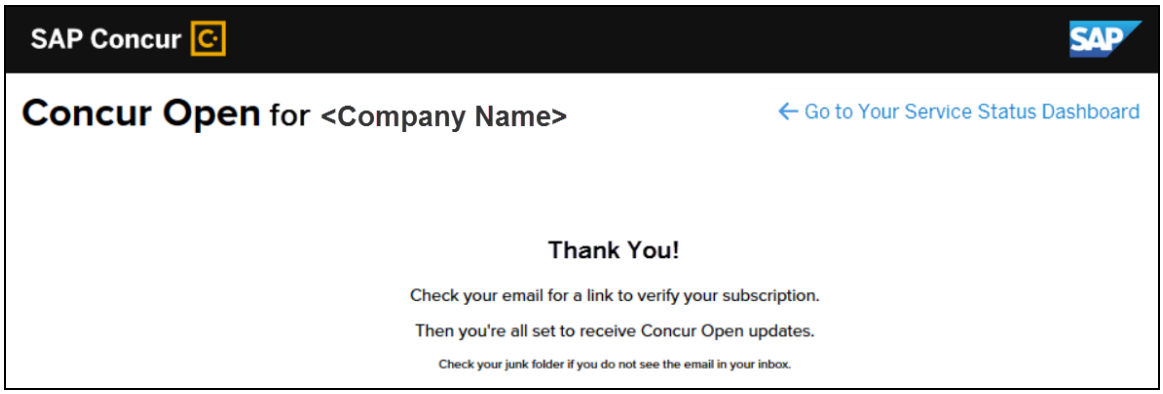
To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.

The user clicks **Continue**. A page similar to the following appears.



The page lists only the services and data center associated with the user's company. The user selects the desired services and alert types and then clicks **Subscribe**.

A confirmation message appears.



More About Email Addresses in Profile

As described above, an SSO user must access the personalized view by entering their email address on the **Sign In With Concur** page and then clicking **Send a link to my email**.

Note the following:

- The user completes this process every time they want to access the personalized view.
- The email address that the user enters:
  - Must match the address in the **Email 1** field in their SAP Concur profile
  - Must be "verified"
  - Must be unique to that user; it cannot be shared with multiple people or logins in their company
- If an employee no longer has access to SAP Concur (for example, if the employee leaves the company), that employee can no longer access the personalized view. In order to access the personalized view, a user must have a Concur login or an email address in their SAP Concur profile. Inactive users and terminated employees do not have a Concur login or email address in an SAP Concur profile.

Existing Subscription Information

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

For those with subscriptions ***before*** the release of the new Personalized Concur Open, note the following:

- If a user subscribed using their business email and if SAP Concur can successfully match it to an existing SAP Concur customer, then SAP Concur will:

- Set the user's new subscription to match the company's services and data center in Personalized Concur Open
- Notify the user of the change

NOTE: After the new view is available, it is considered a best practice to sign in to the subscription page and verify the selected options for accuracy.

- If a user subscribed using their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user's subscription will be removed from Concur Open in 30 days. These customers will be notified of this change by email.

Configuration / Feature Activation

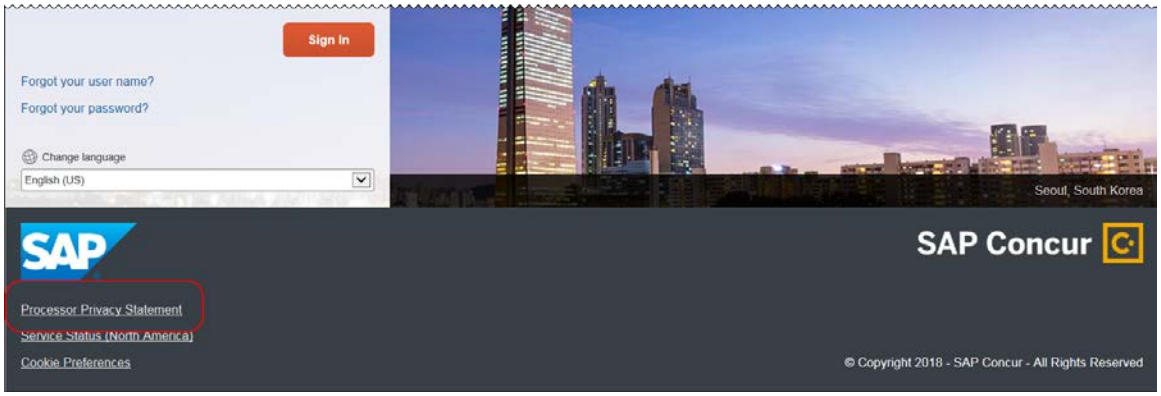
The enhancements will be automatically available; there are no additional configuration or activation steps.

Processor Privacy Statement

Processor Privacy Statement Link in Online Help

Overview

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



Not all pages in SAP Concur display the footer. If the link is not displayed, return to the Home page and click the **Processor Privacy Statement** link there.

The **Processor Privacy Statement** link is also available in online Help.

Configuration / Feature Activation

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

Planned Changes

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

Invoice

Planned Changes Payment Request(s) Renamed to Invoice(s)

Overview

In a future release, SAP Concur will replace instances of the term "payment request" and its iterations with the term "invoice" and its iterations. These changes will be made in the user interface, the Invoice documentation, and any other SAP Concur product documentation where it appears.

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps to ensure that the terminology used in SAP Concur is consistent with industry standard terminology.

Configuration / Feature Activation

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

Vendor APIs

Planned Changes v3.0 Vendor APIs Updated to Support JWT Authentication

Overview

SAP Concur will add support for company JSON Web Token (JWT) authentication to the following v3.0 vendor methods and APIs on https://developer.concur.com:

- POST
- PUT
- DELETE
- Add/Update Vendor Banking
- Add Vendor Group
- Delete Vendor Group

BUSINESS PURPOSE / CLIENT BENEFIT

These changes will enable SAP Concur to certify third-party integration partners as SAP Concur App Center Partners.

Configuration / Feature Activation

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

Plain Text FTP Support

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

Overview

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

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

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

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

What This Means – The Client Experience

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

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

Client Notifications

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

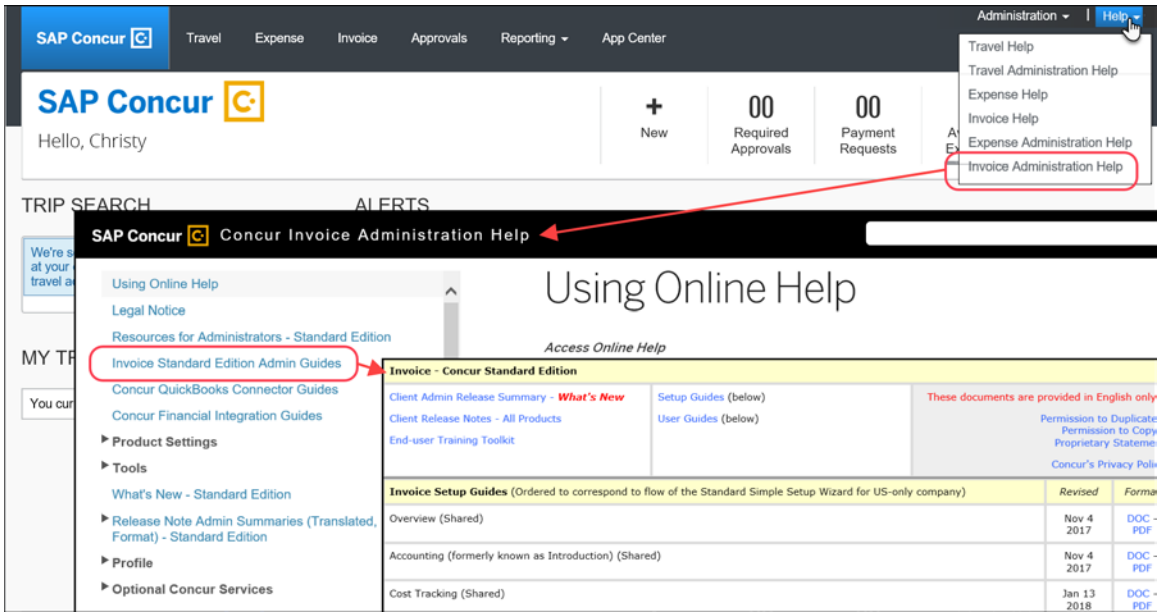
The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

A user who is assigned an admin role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through **Invoice Administration Help**.

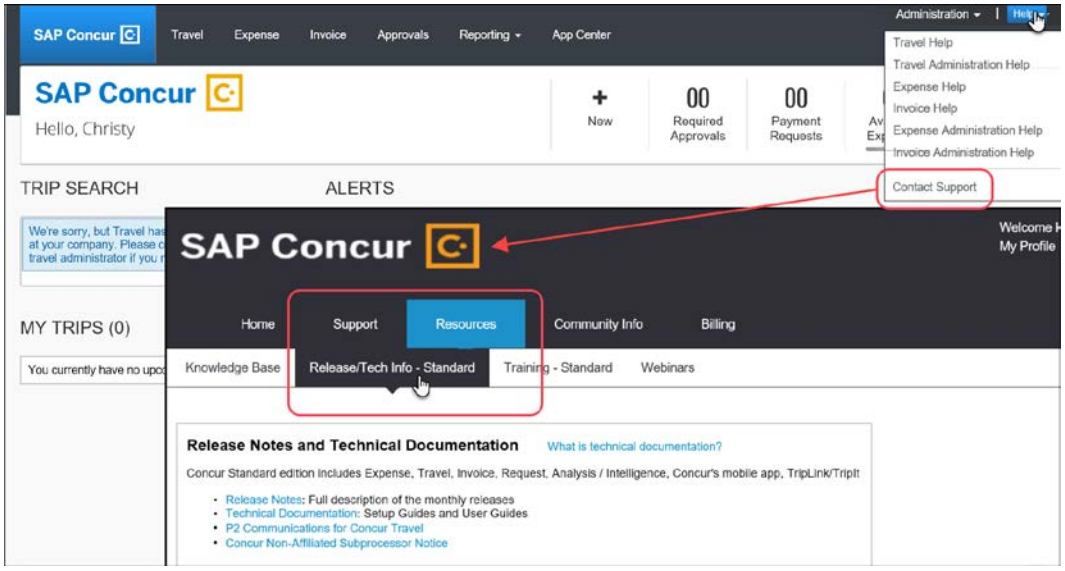


Concur Support Portal – Selected Users

Users who are assigned the correct Concur Support Portal permissions can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through the Concur Support Portal

To access the Concur Support Portal (for users with the correct permissions)

1. Click **Help > Contact Support**.
2. On the support page, click **Resources > Release/Tech Info**.



SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: August 18, 2018 Initial Post: Friday, August 17 12:00 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Invoice functionality for Concur Professional edition.

Invoice

New User Interface for Invoice available in Early Access Release

Overview

SAP Concur has introduced the first version of a new user interface for Invoice clients. Version 1.0 of the new user interface is targeted at the Accounts Payable (AP) user who is constantly monitoring the health of the Invoice lifecycle within the system. With a new AP landing page, concepts of "call to action" and "work to zero" are being brought to the forefront to better inform AP to ensure they are working on the highest priority task.

NOTE: The new user interface for Invoice is available to designated clients in Early Access release. This new interface is not related to Next Generation Expense and will be made generally available on a separate timeline after the Early Access phase is completed. Contact your SAP Concur representative for more information about enabling this feature.

BUSINESS PURPOSE / CLIENT BENEFIT

The new Invoice user interface enables clients to work more efficiently and provides them greater visibility into their invoices in flight.

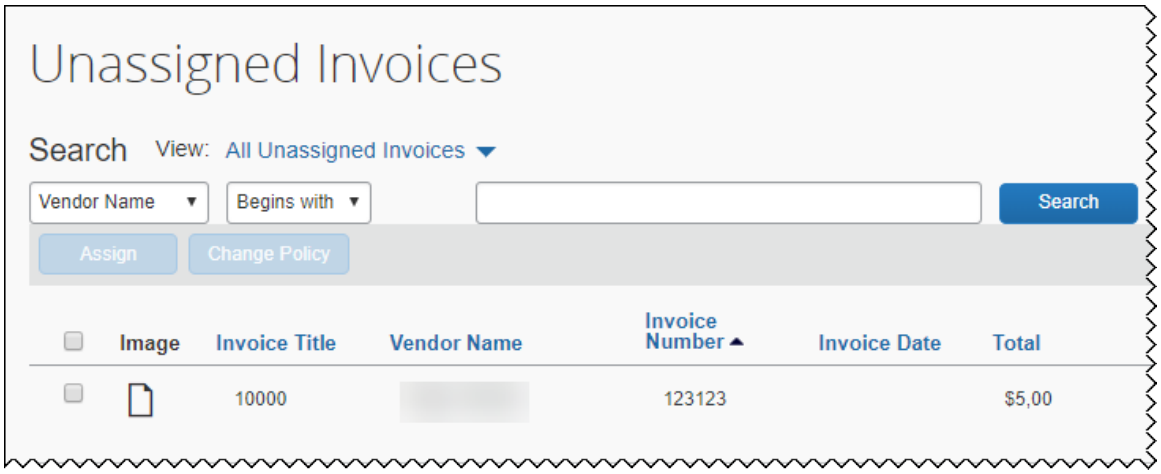
WHAT THE INVOICE AP USER AND INVOICE PROCESSOR SEE

The Invoice AP User and the Invoice Processor will now land on a new **Invoice Manager** page that provides key information about all active invoices.

On the **Invoice Manager** tab, the user sees new tiles and new sections including visibility into **Active Invoices** and **My Tasks** sections.

The Invoice Processor also sees a newly designed **Unassigned Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.

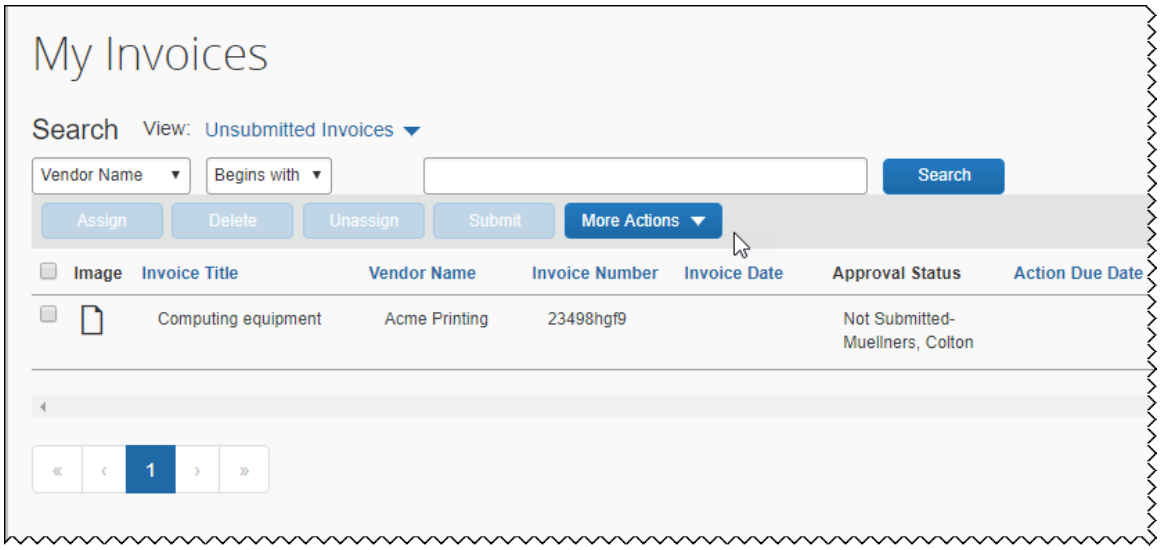
Unassigned Invoices



WHAT THE INVOICE USER SEES

Invoice users who currently have access to **My Requests**, will see a newly designed **My Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.

My Invoices



Configuration / Feature Activation

This feature is available in **Early Access** release and is enabled by SAP Concur for designated clients. Contact your SAP Concur representative for more information about enabling this feature.

NOTE: More information about the new Invoice user interface will be made available in future release notes.

Payment Request

Historical Origin Source

Overview

A new origin source type, **Historical Invoice**, has been added to the **Origin Source** field that appears on the **Invoice Details** page for an invoice. The **Historical Invoice** origin source type indicates that an invoice was imported as a historical invoice.

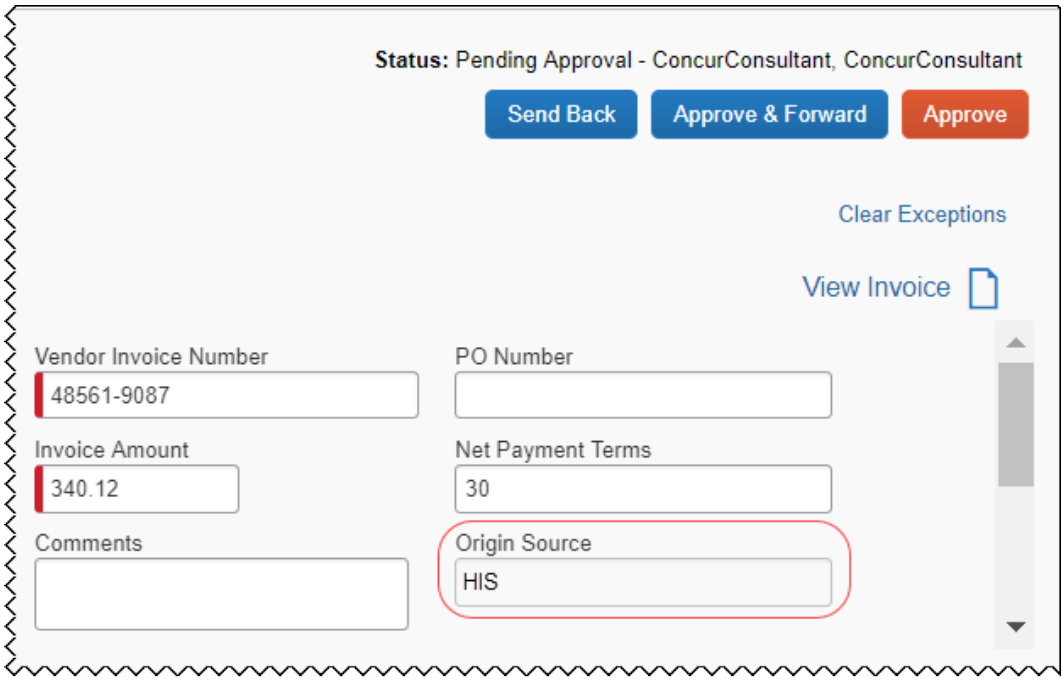
For more information about historical invoices, refer to the *Historical Record (Record Type 210)* section in the *Invoice: Payment Request Import V2 (Current) Specification Guide.*

BUSINESS PURPOSE / CLIENT BENEFIT

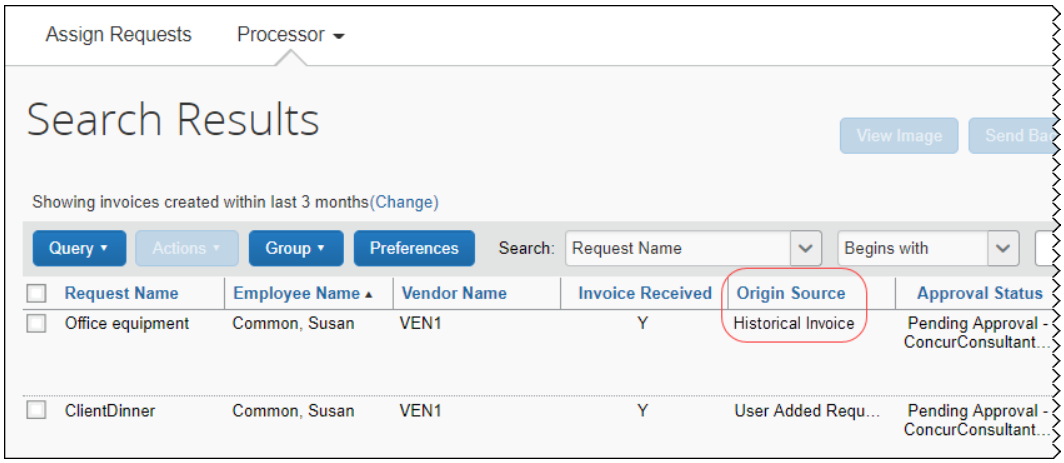
The addition of the **Historical Invoice** type to the **Origin Source** field enables the Invoice Processor and the Invoice Payment Manager to find and filter invoices that were imported into Concur Invoice as historical invoices. The addition of the **Historical Invoice** type also enables the Invoice Admin to set up audit rules for historical invoices.

What the Invoice Processor sees

When viewing the details for an invoice, the Invoice Processor sees a new type, **HIS**, in the **Origin Source** field on the **Invoice Details** page.

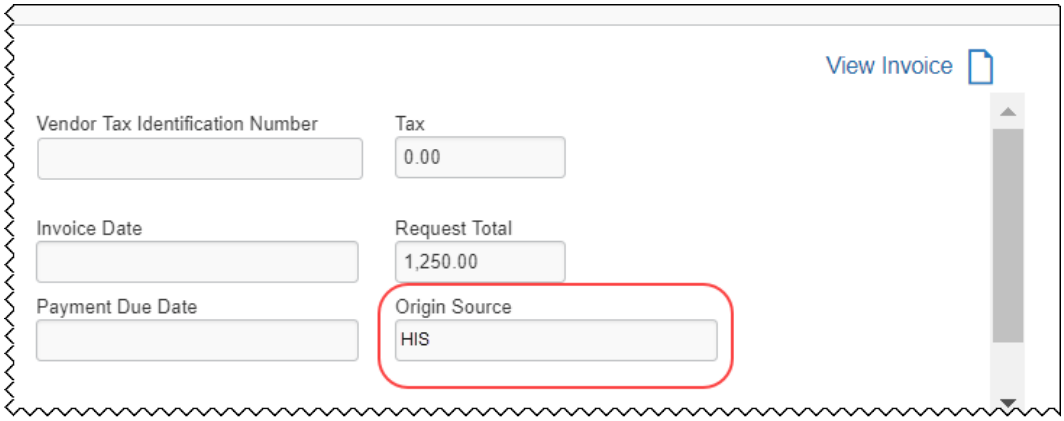


In addition, if the **Origin Source** column has been added to the **Invoice > Processor> Process Requests** page through the **Preferences** menu, the Invoice Processor sees a new type, **Historical Invoice**, when viewing search results and lists that include historical invoices.



What the Invoice Payment Manager sees

When viewing the details for an invoice, the Invoice Payment Manager sees a new type, **HIS**, in the **Origin Source** field on the **Invoice Details** page.

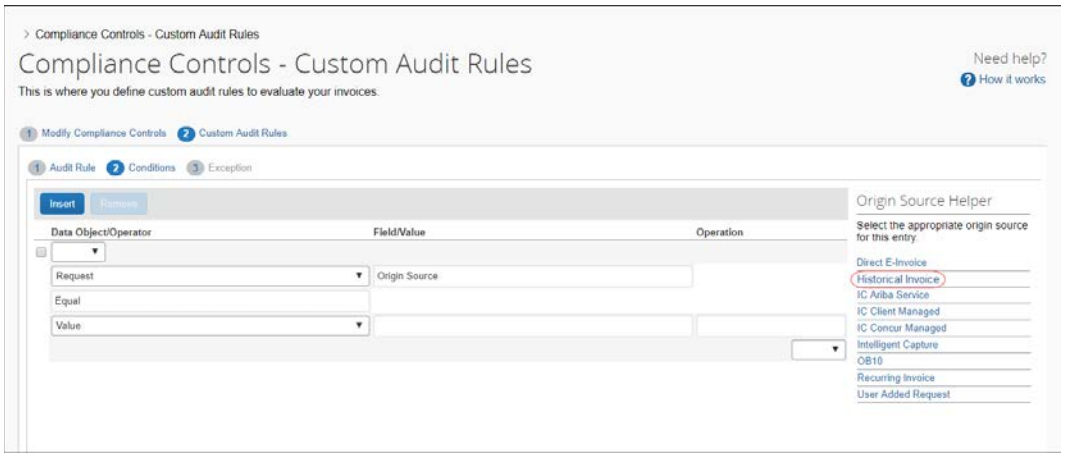


NOTE: The **Origin Source** field contains one of the following values depending on where the invoice originated:

ARB (IC Ariba Service)
DIR (Direct E-Invoice)
HIS (Historical Invoice)
ICL (IC client Managed)
ICM (IC Concur Managed)
IDR (Intelligent Capture)
IMP (OB10)
MAN (User Added Request)
REC (Recurring)

What the Invoice Admin sees

The Invoice Admin sees the new **Historical Invoice** origin source in the list of values that are available when configuring an audit rule based on the **Origin Source** field.



Configuration / Feature Activation

The **Historical Invoice** origin source type is automatically available; there are no additional configuration or activation steps.

Purchase Order APIs

v3.0 Purchase Order and Purchase Order Receipt APIs Updated to Support JWT Authentication

Overview

SAP Concur now supports JSON Web Token (JWT) authentication through the following v3.0 purchase order and purchase order receipt APIs that are available on https://developer.concur.com:

Purchase Order APIs

- POST
- PUT
- GET

Purchase Order Receipt APIs

- POST
- PUT

- GET
- DELETE

BUSINESS PURPOSE / CLIENT BENEFIT

These changes enable SAP Concur to expand partnerships with third-party integration partners, which will provide additional integration options to our clients.

Configuration / Feature Activation

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

Vendor APIs

v3.0 Vendor APIs Updated to Support JWT Authentication

Overview

SAP Concur now supports JSON Web Token (JWT) authentication through the following v3.0 vendor methods and APIs that are available on https://developer.concur.com:

- POST
- PUT
- DELETE
- Add/Update Vendor Banking
- Add Vendor Group
- Delete Vendor Group

NOTE: The vendor API GET method already supports JWT authentication.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes enable SAP Concur to expand partnerships with third-party integration partners, which will provide additional integration options to our clients.

Configuration / Feature Activation

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

QuickBooks

Prevent Connection to or Disconnection from QuickBooks When Reports or Invoices are In-Flight

Overview

SAP Concur has updated the connection/disconnection process for QuickBooks to prevent clients from either connecting or disconnecting the integration when they have expense reports or invoices in-flight. The in-flight reports and invoices may have posting issues when the integration is disabled or re-enabled.

This change impacts all QuickBooks integrations:

- The QuickBooks Connector, using QuickBooks Online or QuickBooks Desktop
- The Concur Financial Integration with QuickBooks, using QuickBooks Online or QuickBooks Desktop (currently in Early Access)

SAP Concur has identified some situations where it is necessary to disconnect the integration despite in-flight reports or invoices. In those cases, clients should contact Concur Client Support for assistance.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature prevents posting failures at companies that need to either connect or disconnect the integration.

Configuration / Feature Activation

This change is automatically on; no additional configuration or feature activation is required.

Plain Text FTP Support

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

Overview

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

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

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

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

What This Means – The Client Experience

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

Configuration / Feature Activation

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

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.

Invoice

Planned Changes Payment Request(s) Renamed to Invoice(s)

Overview

In a future release, SAP Concur will replace instances of the term "payment request" and its iterations with the term "invoice" and its iterations. These changes will be made in the user interface, the Invoice documentation, and any other SAP Concur product documentation where it appears.

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps to ensure that the terminology used in SAP Concur is consistent with industry standard terminology.

Configuration / Feature Activation

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

Purchase Order

Planned Changes Purchase Order Extract for Invoice Standard Edition

Overview

In a future release, SAP Concur will enable Invoice Standard clients to configure purchase order extracts.

With the purchase order extract feature, buyers can extract a purchase order for the vendor goods and services they need in electronic format. The data extracted from Invoice can be used to populate data in the client's financial system.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables clients to automate the extraction of purchase order data from Invoice.

Configuration / Feature Activation

When this feature becomes available, contact Concur Support for information about enabling and configuring extracts.

Planned Changes Purchase Order Receipt Extract for Invoice Standard Edition

Overview

In a future release, SAP Concur will enable Invoice Standard clients to configure purchase order receipt extracts.

The Purchase Order receipt extract enables clients to update their ERP or inventory system with Invoice purchase order good's receipt data. On extract from the Invoice system, the client can import the extracted receipt data into their system of record so that the inventory values reflect the quantities received.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables clients to automate the extraction of purchase order receipt data from Invoice.

Configuration / Feature Activation

When this feature becomes available, contact Concur Support for information about enabling and configuring extracts.

Purchase Request

Planned Changes New Receipt Type Field in Custom Audit Rules

Overview

In a future release, the purchase request **Receipt Type** field will be added to the list of fields that are available when the Invoice Admin configures custom audit rules for purchase request items.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables the admin to enforce rules regarding what the **Receipt Type** field in a service type purchase request must be set to before the purchase request can be submitted.

Configuration / Feature Activation

The field is automatically available on systems that have Invoice and Concur Purchasing enabled.

For more information about custom audit rules, refer to the *Invoice: Compliance Controls Setup Guide for Concur Standard.*

Create and Approve Vendors

Planned Changes Fields No Longer Required When Creating a Vendor

Overview

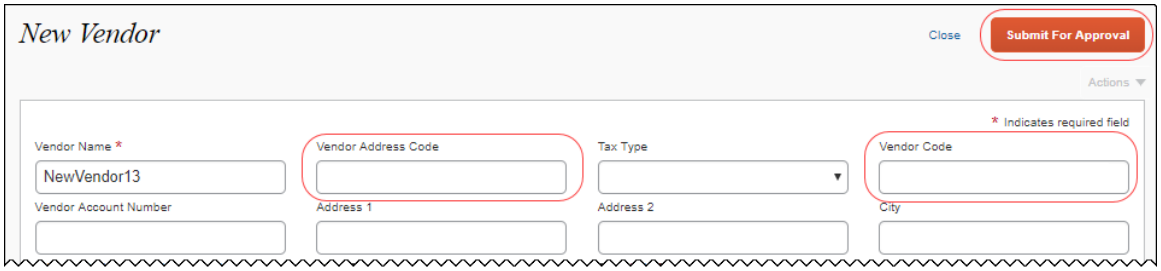
At a future date, when a new vendor is created through the Create and Approve Vendors feature, the **Vendor Code** and the **Vendor Address Code** fields will no longer be required. These fields will be required when approving a vendor but will not be required when creating a new vendor prior to approval.

BUSINESS PURPOSE / CLIENT BENEFIT

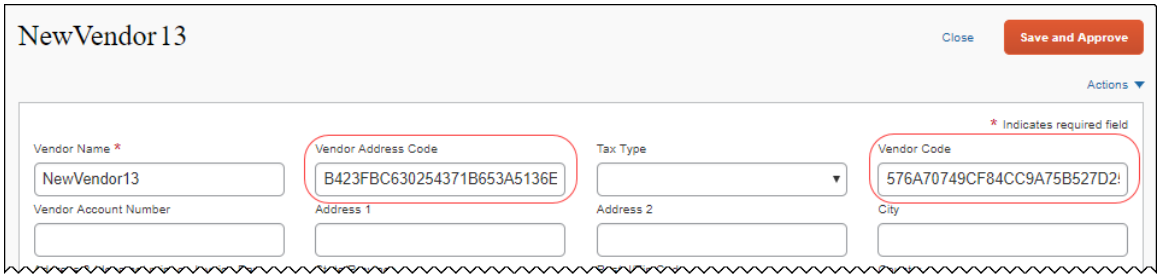
This enhancement enables the Vendor Manager to allow the **Vendor Code** and **Vendor Address Code** field data to be generated automatically by Invoice. This enhancement also ensures that these codes are unique to the vendor.

What the Vendor Manager sees

When creating a new vendor, the **Vendor Address Code** and **Vendor Code** fields will not be required. After entering the required vendor name, the **Submit For Approval** button becomes available.



After the new vendor is submitted for approval, when the Vendor Manager opens the vendor form to approve the vendor, they will see that the **Vendor Address Code** and **Vendor Code** fields have been automatically populated with a unique string.



NOTE: The text in the **Vendor Address Code** and **Vendor Code** fields is editable until the vendor is approved. Once approved, the fields cannot be updated.

Configuration / Feature Activation

This enhancement will be automatically available; there are no additional configuration or activation steps.

Concur Open

Planned Changes Personalized Concur Open

Overview

Concur Open is the SAP Concur service status dashboard. It displays known and widespread outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

In a future release, new functionality will be added to Concur Open. Users will continue to access Concur Open and view Concur service availability; no functionality will be removed. However, with the release, SAP Concur users will be able to log in to Concur Open and:

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

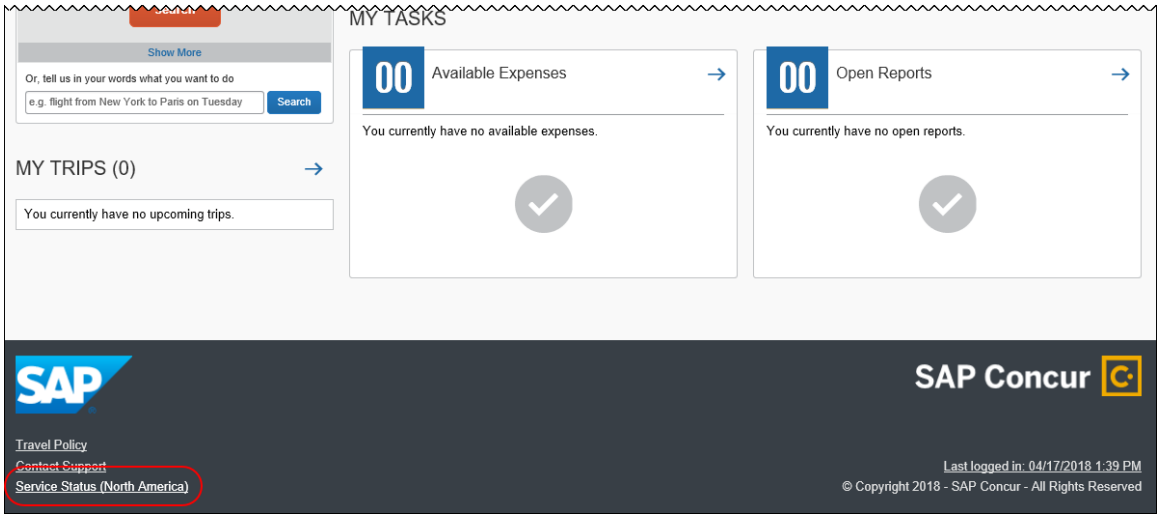
BUSINESS PURPOSE / CLIENT BENEFIT

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

What the User Sees – Access Concur Open

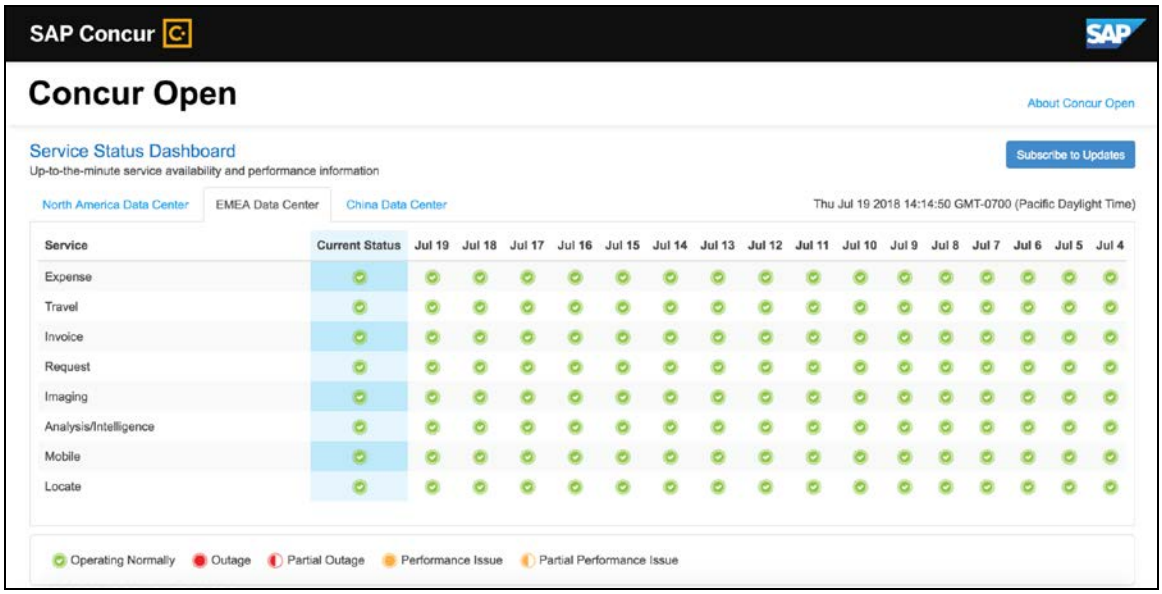
Users can access Concur Open two ways:

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



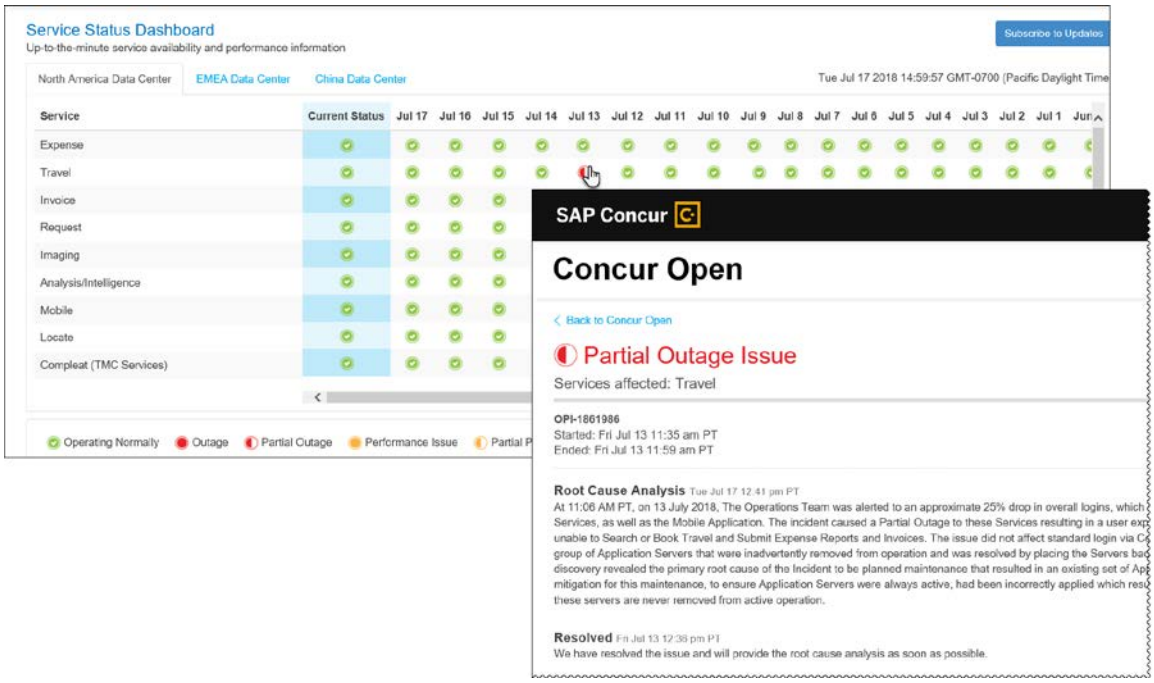
Concur Open appears.

What the User Sees – Current View



Currently, the user sees all data center tabs, the service activity (up to the previous 20 days), and the service legend (bottom of the page).

The user can click an icon to review information about service activity.

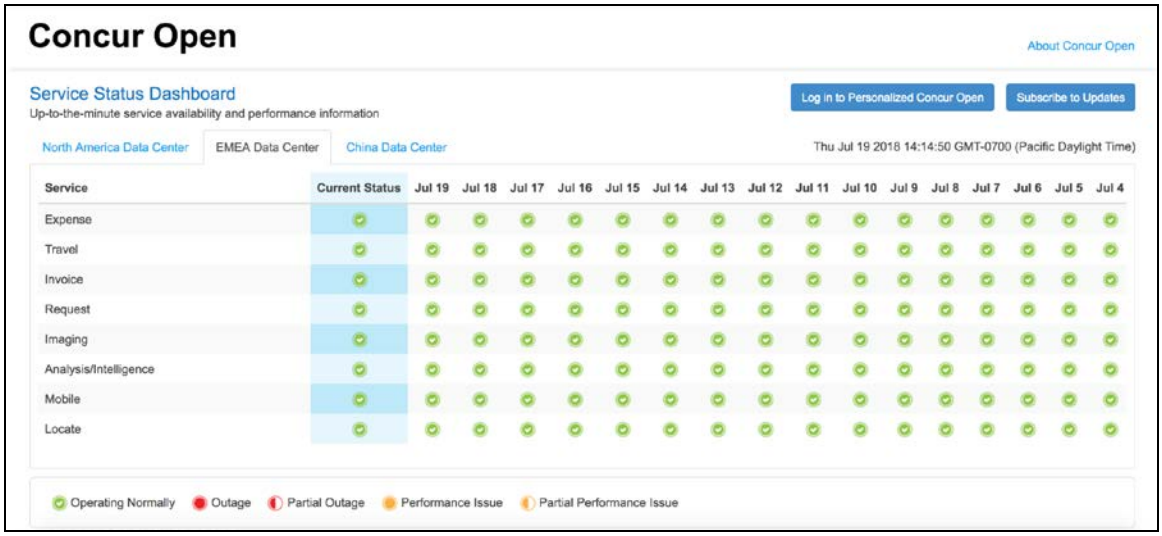


The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New View and Process

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

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



On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button – just like they currently do. That will not change – anyone can access the public version (open.concur.com) and anyone can request notifications.

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

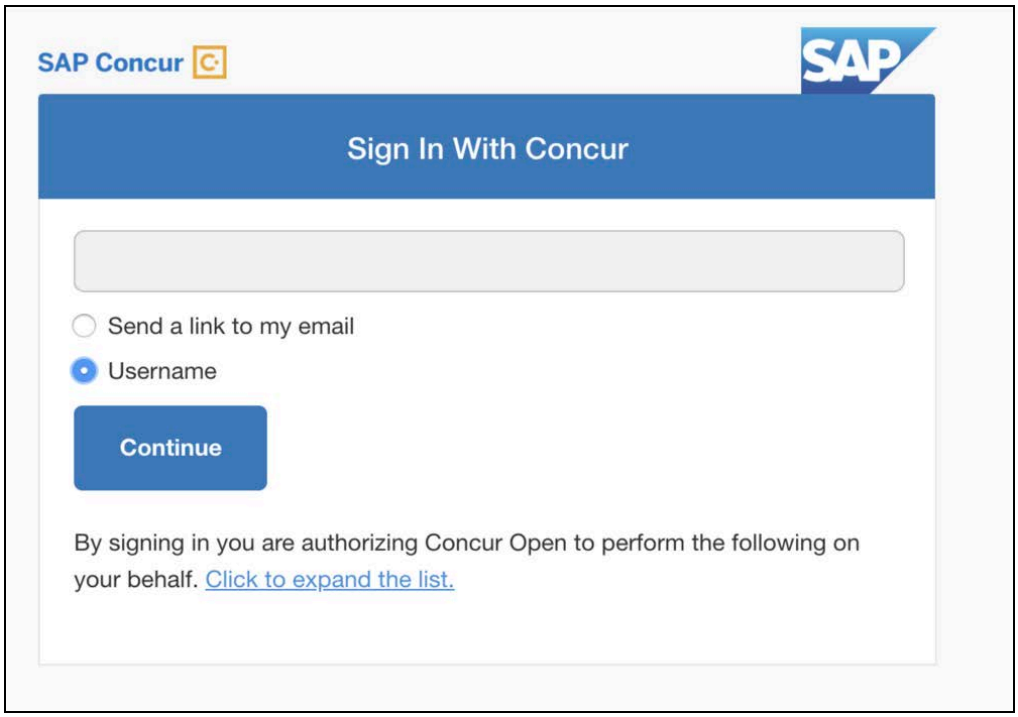
SIGN IN TO THE PERSONALIZED DASHBOARD

The personalized view does not require a new username/password. Users sign in with their existing SAP Concur credentials.

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

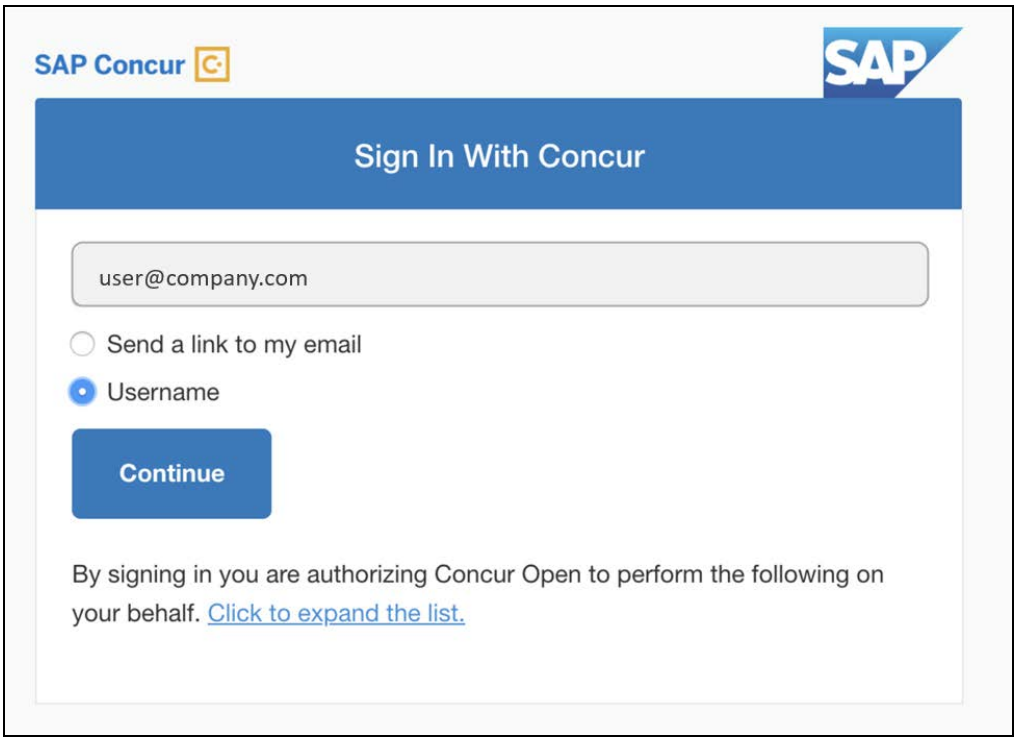
On the main page, the user clicks the **Log in to Personalized Concur Open** button.

The **Sign In With Concur** page appears.



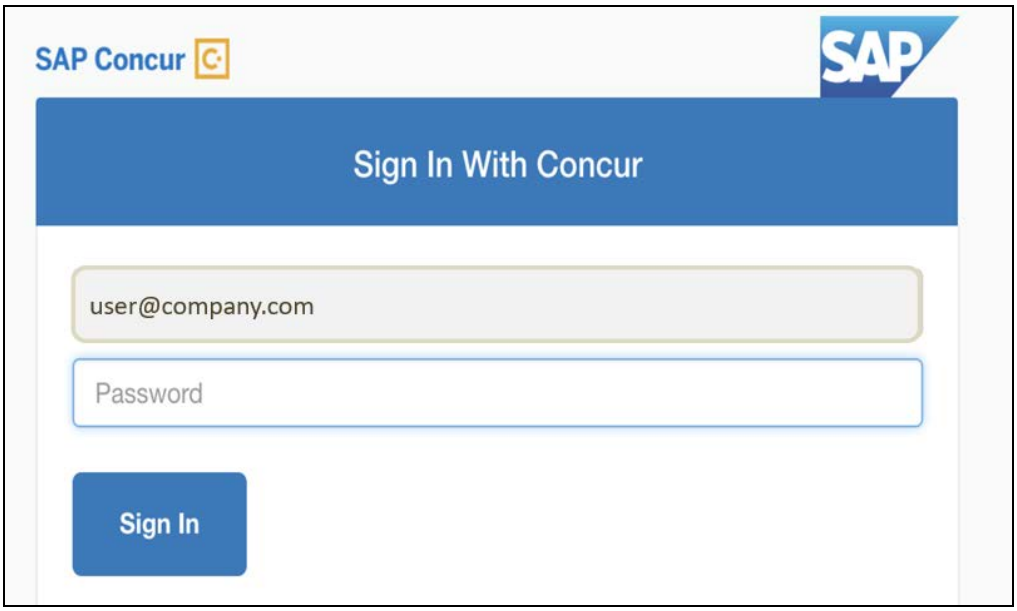
Then, depending on the customer's implementation of SAP Concur:

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



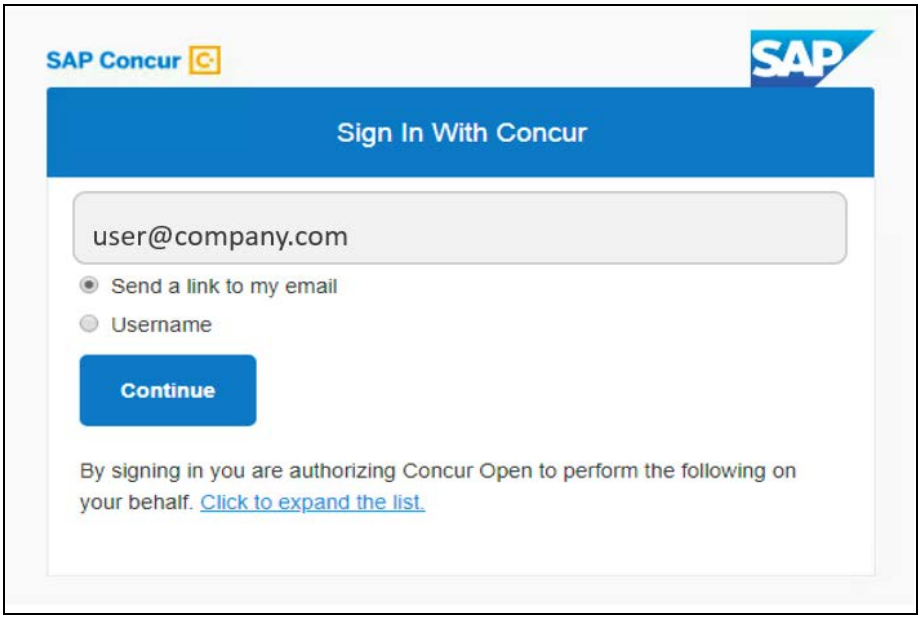
Then, on this page, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**.

The following page appears.



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

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

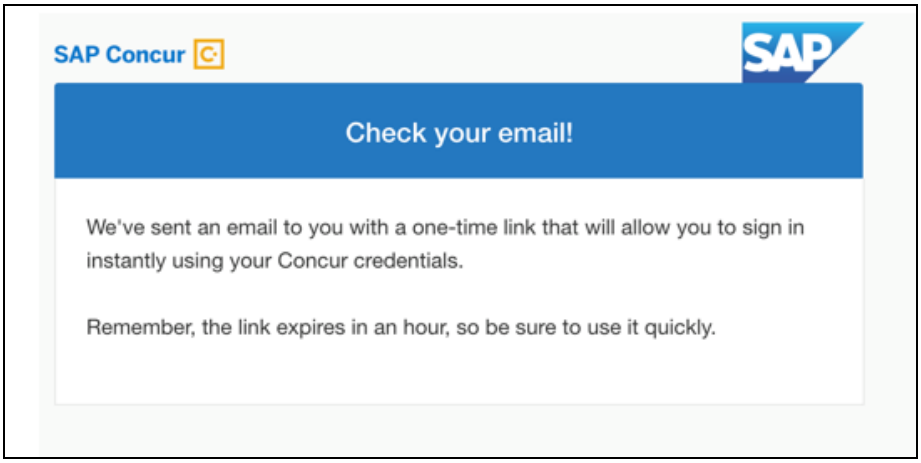


Then, on this page, the user enters their email address, clicks **Send a link to my email**, and clicks **Continue**.

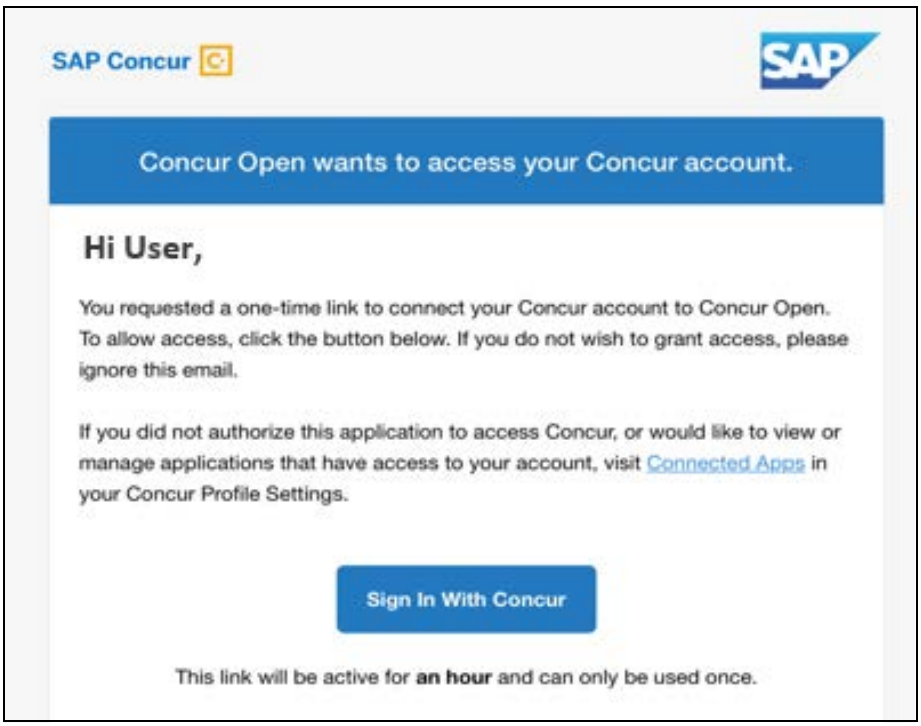
SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

📖 Refer to *More About Email Addresses in Profile* for more detail.

The following message appears:



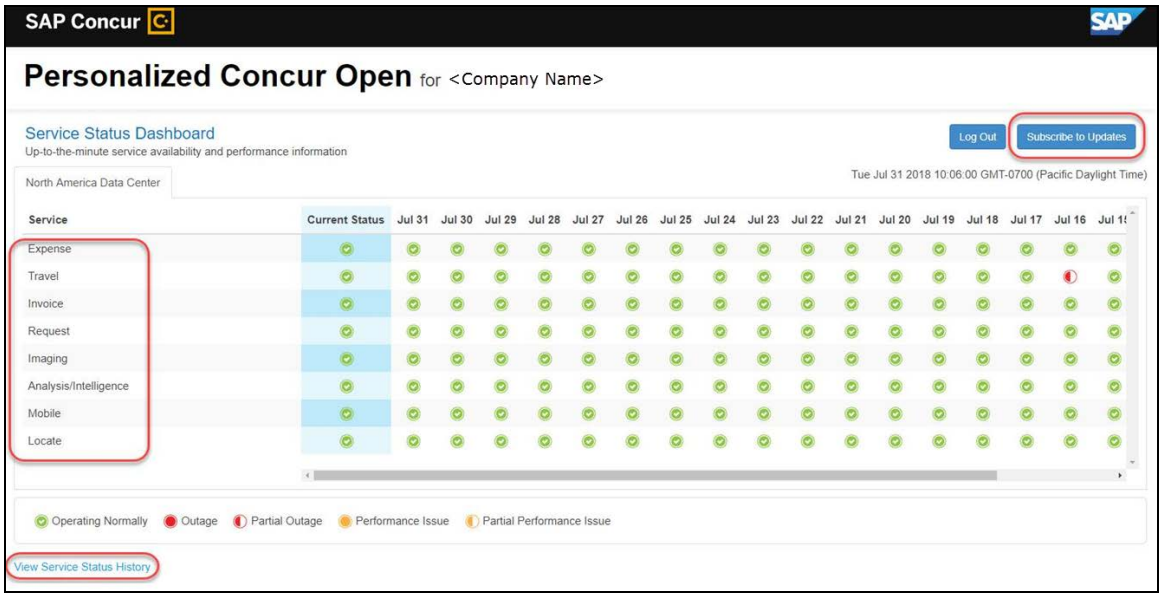
An email similar to the following is sent to the email address.



The user clicks **Sign In With Concur**. The user is then directed to the personalized view.

NOTE: The ***one-time*** link is active for ***one hour***.

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

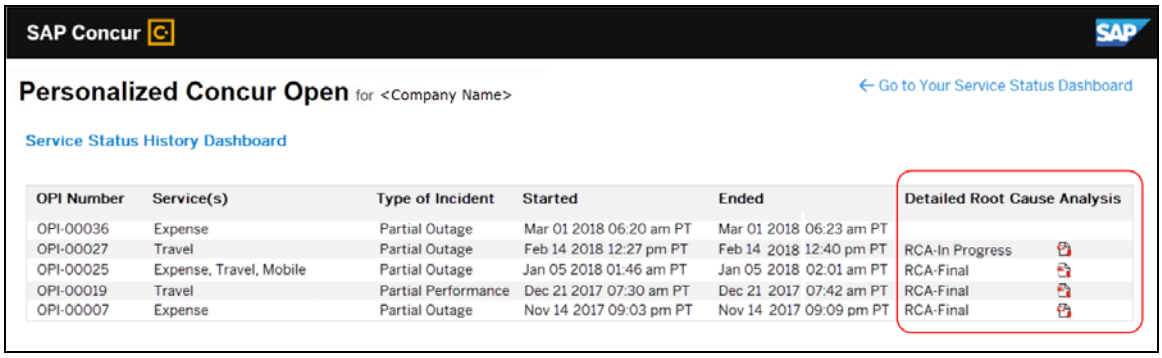


On the **Service Status Dashboard** page, the user can:

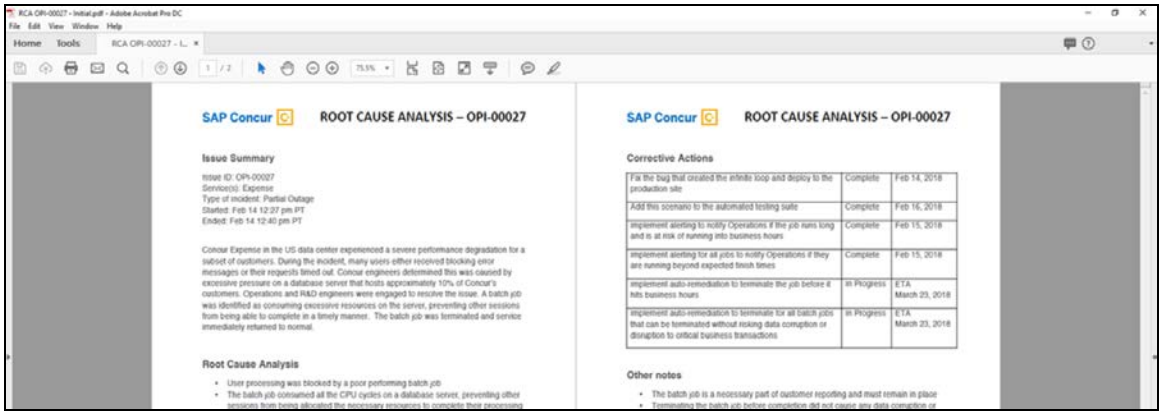
- View:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company.
- Subscribe to updates

VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

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



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

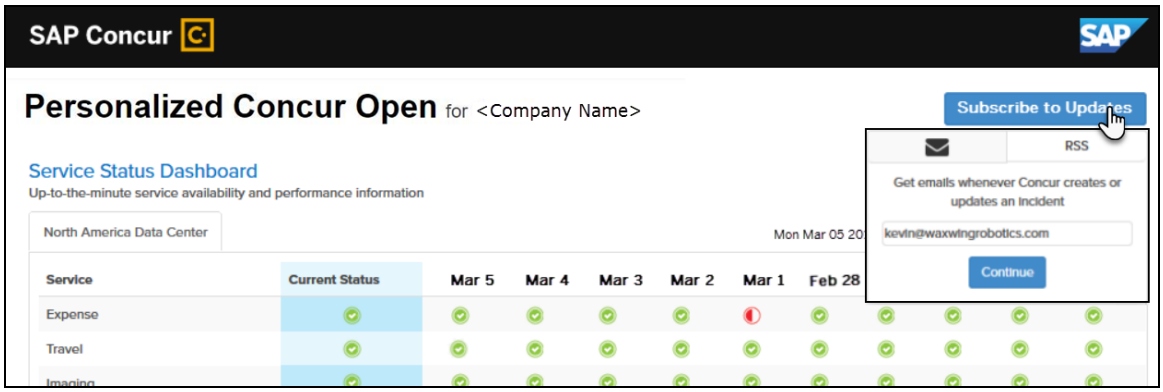


NOTE: The root cause PDFs will be available starting around the date that the personalized view becomes available. Though service information (start/stop dates and times, type of incident, etc.) will be provided for the activity of the past two years, the PDFs will not; they will be provided on a *go-forward* basis.

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

SUBSCRIBE TO UPDATES

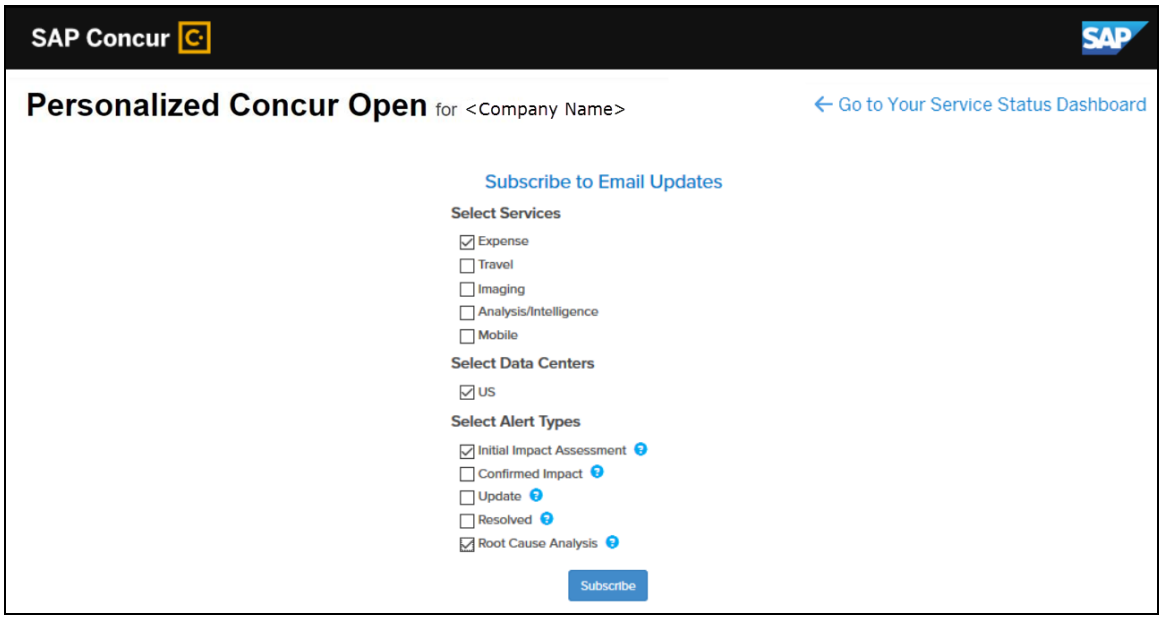
On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed.



To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.

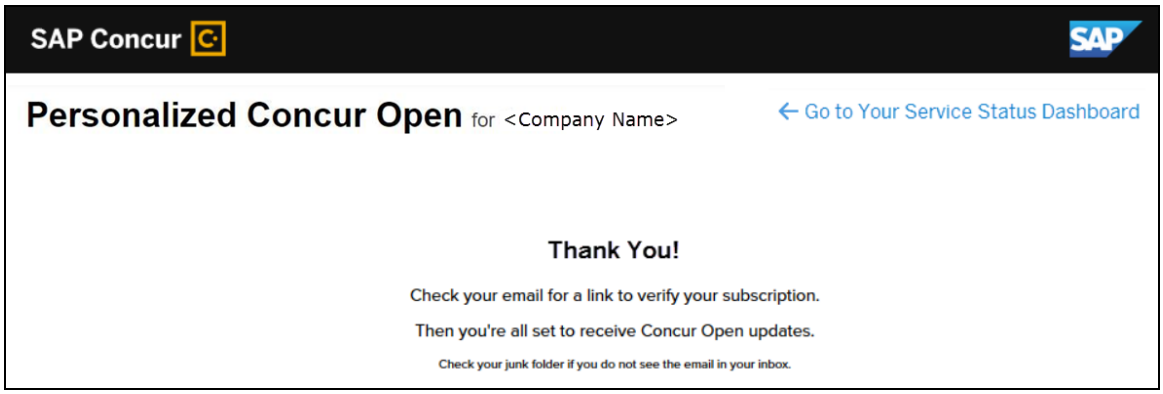
The user clicks **Continue**.

The following page appears.



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

A confirmation message appears.



User Remains Signed In

The user automatically remains signed in for seven days. In that seven-day period, whether the user enters directly (using https://open.concur.com) or they click **Service Status** in the lower-left corner of the SAP Concur screen, they are directed to the generic Concur Open page. When they click **Log in to Personalized Concur Open**, users bypass the login page and go directly to the **Personalized Concur Open** page.

If, during the seven-day period, the user wants to log out, they click **Log Out** on the **Service Status Dashboard** page.

More About Email Addresses in Profile

As described above, an SSO user must access the personalized view by entering their email address on the **Sign In With Concur** page and then clicking **Send a link to my email**.

Note the following:

- The email address that the user enters:
  - Must match the email address in the **Email 1** field in their SAP Concur profile; Email 1 must be verified
  - Must be unique to that user; it cannot be shared with multiple people or logins in their company
- If an employee no longer has access to SAP Concur (for example, if they leave the company), that employee can no longer access the personalized view. In order to access the personalized view, they *must* have a Concur login or an email address in their SAP Concur profile. An inactive user or terminated employee meets neither of those requirements.

Existing Subscription Information

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

For those with subscriptions ***before*** the release of the new Personalized Concur Open:

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

  NOTE: When the new view becomes available, it is considered best practice to sign in to the subscription page and verify the selected options for accuracy.

- If a user subscribed using their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then the user's subscription will be removed from Concur Open in 30 days. These customers will be notified of this change by email.

Configuration / Feature Activation

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

Client Notifications

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

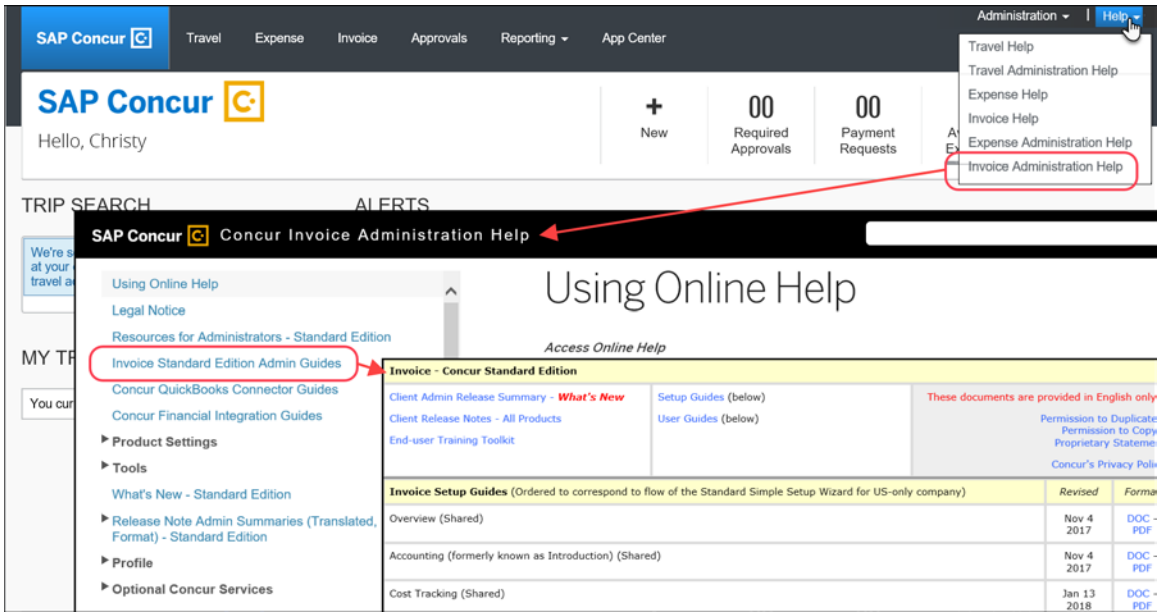
The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

A user who is assigned an admin role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through **Invoice Administration Help**.

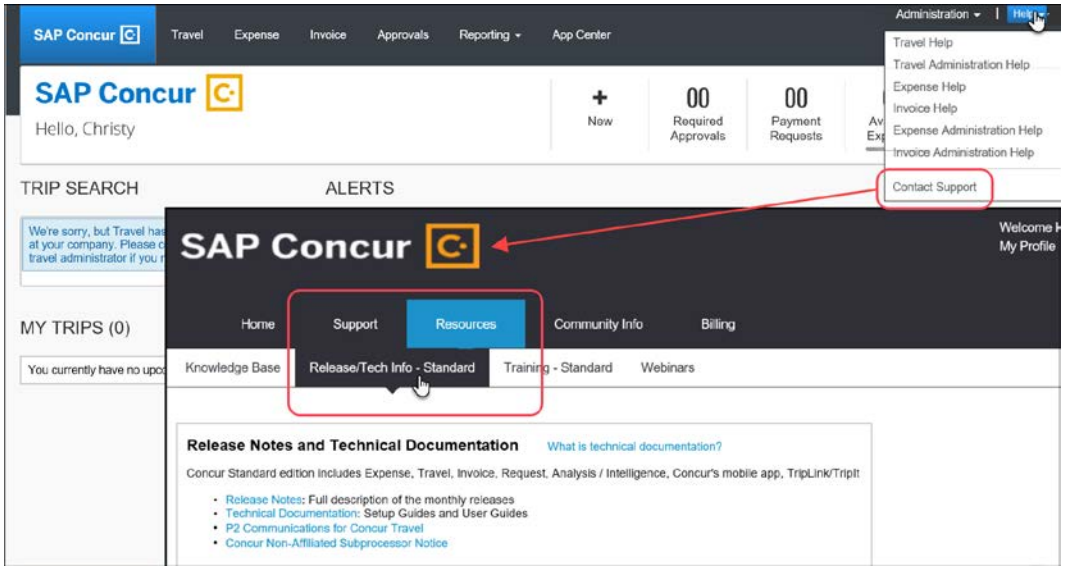


Concur Support Portal – Selected Users

Users who are assigned the correct Concur Support Portal permissions can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through the Concur Support Portal

To access the Concur Support Portal (for users with the correct permissions)

1. Click **Help > Contact Support**.
2. On the support page, click **Resources > Release/Tech Info**.



SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: September 22, 2018 Initial Post: Friday, September 21, 12:00 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Invoice functionality for Concur Professional edition.

Invoice

New User Interface for Invoice available in Early Access Release

Overview

SAP Concur has introduced the first version of a new user interface for Invoice clients. Version 1.0 of the new user interface is targeted at the Accounts Payable (AP) user who is constantly monitoring the health of the Invoice lifecycle within the system. With a new AP landing page, concepts of "call to action" and "work to zero" are being brought to the forefront to better inform AP users to ensure they are working on the highest priority task.

NOTE: The new user interface for Invoice is available to designated clients in Early Access release. This new interface is not related to Next Generation Expense and will be made generally available on a separate timeline after the Early Access phase is completed. Contact your SAP Concur representative for more information about enabling this feature.

BUSINESS PURPOSE / CLIENT BENEFIT

The new Invoice user interface enables clients to work more efficiently and provides them greater visibility into their invoices in flight.

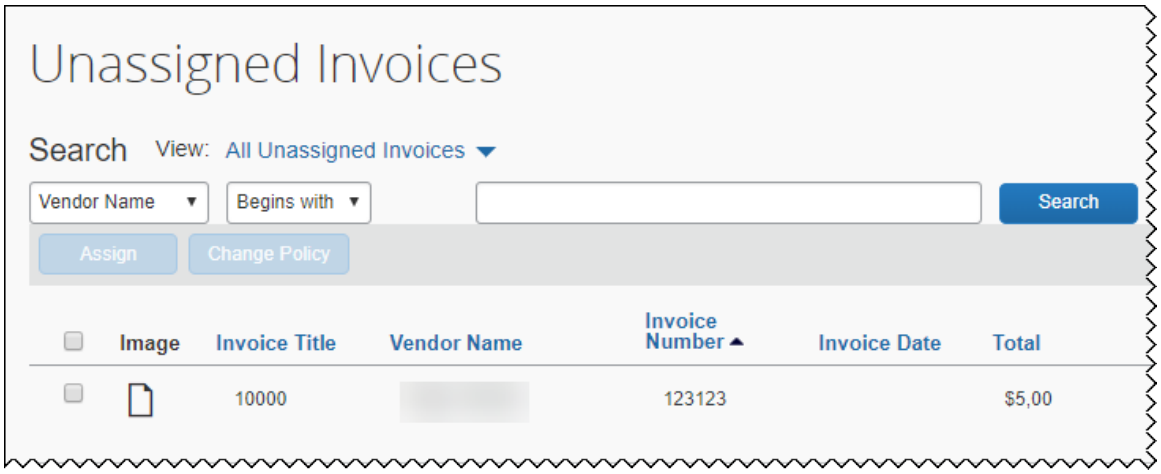
What the Invoice AP User and Invoice Processor See

The Invoice AP User and the Invoice Processor will now land on a new **Invoice Manager** page that provides key information about all active invoices.

On the **Invoice Manager** tab, the user sees new tiles and new sections including visibility into **Active Invoices** and **My Tasks** sections.

The Invoice Processor also sees a newly designed **Unassigned Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.

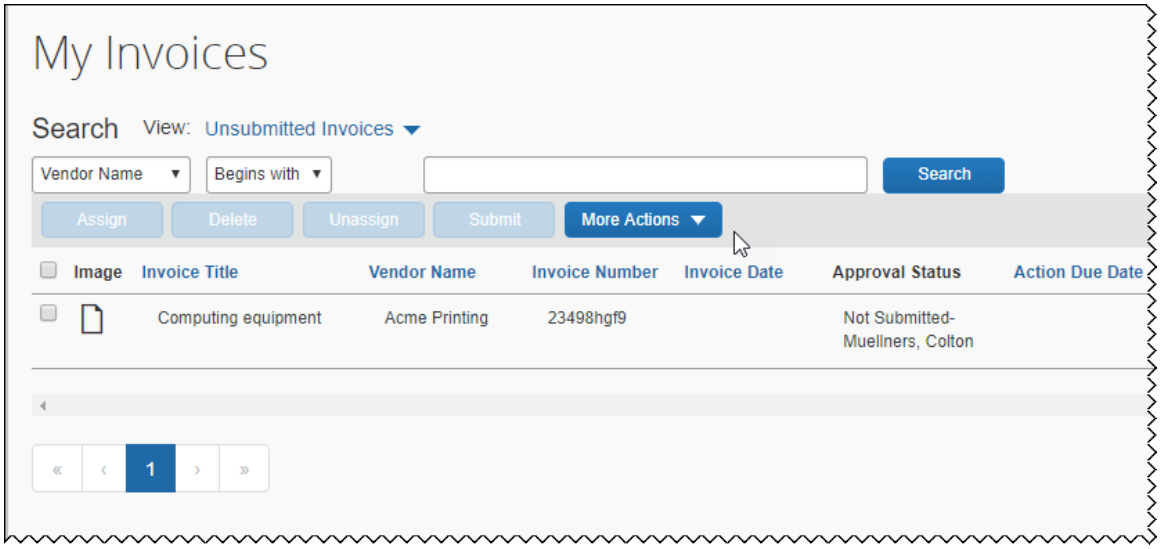
Unassigned Invoices



What the Invoice User Sees

Invoice users who currently have access to **My Requests**, will see a newly designed **My Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.

My Invoices



Configuration / Feature Activation

This feature is available in Early Access release and is enabled by SAP Concur for designated clients. Contact your SAP Concur representative for more information about enabling this feature.

Purchase Order

Purchase Order API Updated

Overview

New fields have been added to the GET, PUT, and POST methods of the Invoice v3 Purchase Order API.

GET
The following fields have been added to the GET method:

- **Purchase Request Number**
  This field contains the Purchase Request Number for the purchase request the purchase order was created from.

- **Is a Change Order**
  This field indicates whether or not the purchase order was created from a change order.

- **Is Test**
  This field indicates whether or not the purchase order is a test purchase order.

PUT and POST
The following field has been added to the PUT and POST methods:

- **Purchase Order Line Item UOM Code**
  This field contains the code for the Unit of Measure associated with the PO line item.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables developers to retrieve more complete information about purchase orders through the GET method.

Configuration / Feature Activation

The new fields are automatically available; there are no additional configuration or activation steps.

Purchase Request

Receipt Type Field Available in Custom Audit Rules

Overview

The purchase request **Receipt Type** field has been added to the list of fields that are available when the Invoice Admin configures custom audit rules for purchase request items.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables the admin to enforce rules regarding what the **Receipt Type** field in a service type purchase request must be set to before the purchase request can be saved or submitted.

Configuration / Feature Activation

The **Receipt Type** field is automatically available to users with the Invoice Admin role on systems that have Invoice and Concur Purchasing enabled.

📖 For more information about custom audit rules, refer to the *Invoice: Compliance Controls Setup Guide for Concur Standard Edition.*

Create and Approve Vendors

Fields No Longer Required When Creating a Vendor

Overview

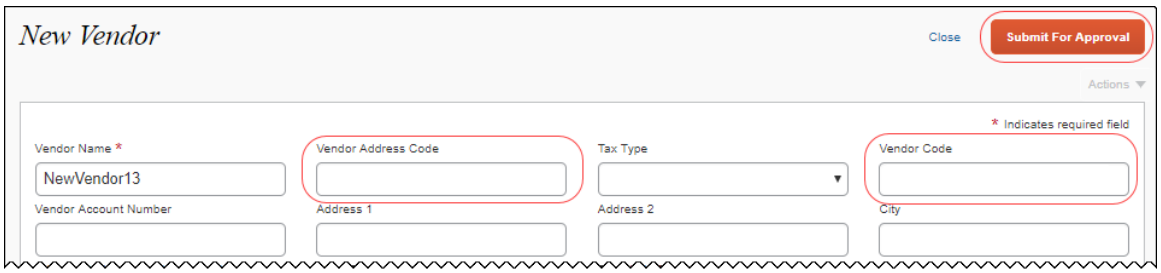
When a new vendor is created through the Create and Approve Vendors feature, the **Vendor Code** and the **Vendor Address Code** fields are no longer required. These fields are required when approving a vendor but are not required when creating a new vendor prior to approval.

BUSINESS PURPOSE / CLIENT BENEFIT

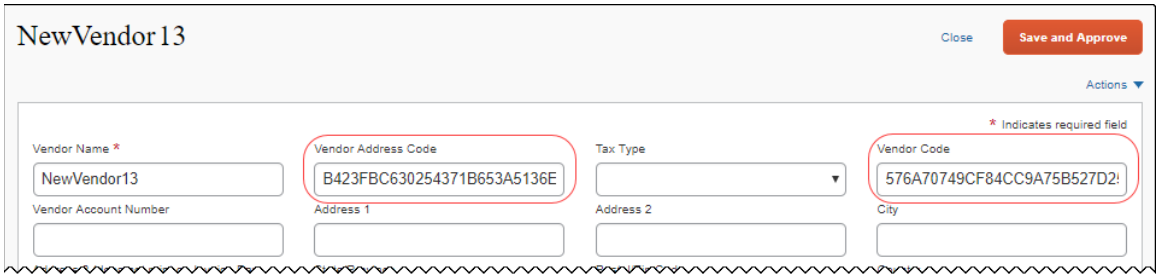
This enhancement enables the Vendor Manager to allow the **Vendor Code** and **Vendor Address Code** field data to be generated automatically by Invoice. This enhancement also ensures that these codes are unique to the vendor.

What the Vendor Manager Sees

By default, when the Vendor Manager creates a new vendor, the **Vendor Address Code** and **Vendor Code** fields are not required. Required fields are denoted by a red asterisk. After all of the required information has been entered, the **Submit For Approval** button becomes available.



After the new vendor is submitted for approval, when the Vendor Manager opens the vendor form to approve the vendor, the **Vendor Address Code** and **Vendor Code** fields have been automatically populated with a unique string.



NOTE: The text in the **Vendor Address Code** and **Vendor Code** fields is editable until the vendor is approved. Once approved, the fields cannot be updated.

Configuration / Feature Activation

This enhancement is automatically available; there are no additional configuration or activation steps.

QuickBooks

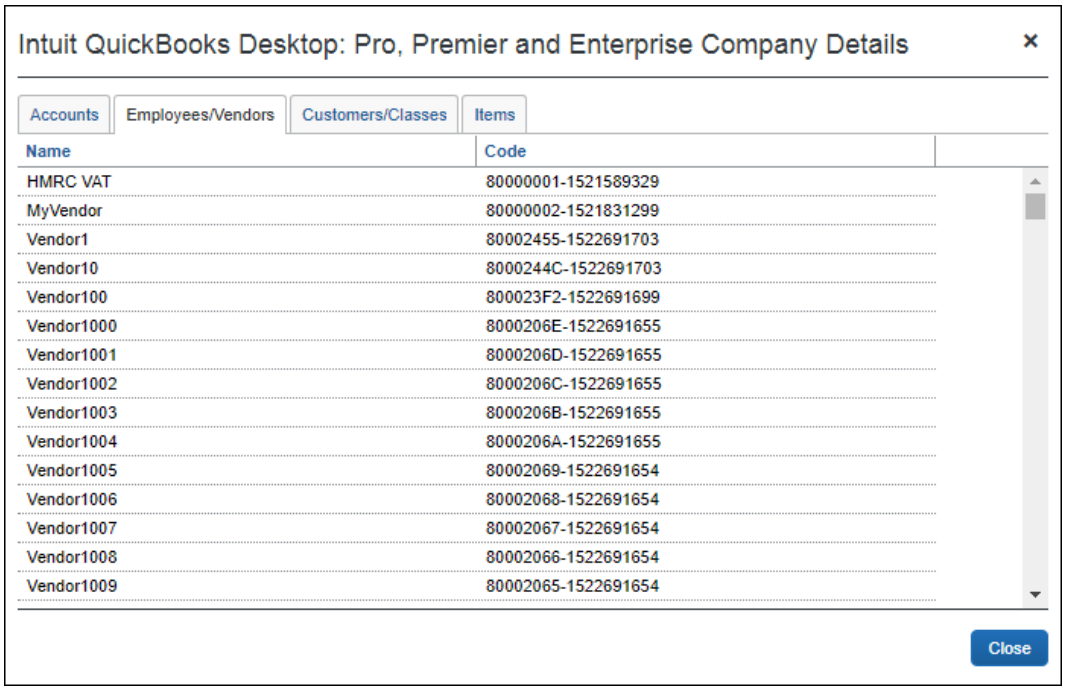
QuickBooks Financial Integration: QuickBooks Data Page Updated

Overview

SAP Concur has updated the page displaying the QuickBooks objects synchronized with SAP Concur for clients that use financial integration. This page (accessed from the **Accounting** page of Product Settings) now contains tabs for each type of object synchronized with SAP Concur:

- Accounts
- Employees/Vendors
- Customers/Classes
- Items

The admin can select the desired tab to view the objects and can now view the code in addition to the name for each cost object.



Name	Code
HMRC VAT	80000001-1521589329
MyVendor	80000002-1521831299
Vendor1	80002455-1522691703
Vendor10	8000244C-1522691703
Vendor100	800023F2-1522691699
Vendor1000	8000206E-1522691655
Vendor1001	8000206D-1522691655
Vendor1002	8000206C-1522691655
Vendor1003	8000206B-1522691655
Vendor1004	8000206A-1522691655
Vendor1005	80002069-1522691654
Vendor1006	80002068-1522691654
Vendor1007	80002067-1522691654
Vendor1008	80002066-1522691654
Vendor1009	80002065-1522691654

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides a detailed view of the objects synchronized between QuickBooks and SAP Concur, with improved performance.

Configuration / Feature Activation

This feature is only available to clients using the financial integration between SAP Concur and QuickBooks. The feature is automatically on; there are no additional configuration or activation steps.

Plain Text FTP Support

Support for Plain Text FTP Ended on September 1st, 2018

Overview

In November 2017, SAP Concur announced the End of Support for plain text FTP to transfer data to and from SAP Concur. SAP Concur provided clients an extension until September 1st, 2018 to complete their transition to secure FTP protocols.

! **IMPORTANT**: Any client that has not transitioned to a secure FTP protocol will be unable to download their SAE and other extract files, or upload Employee, List, Attendee, and other import files.

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

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

Configuration / Feature Activation

This maintenance was ***completed on September 1, 2018***.

The actual DNS names impacted by the described change are:

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

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

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

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

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

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

Concur Open

Personalized Concur Open

Overview

Concur Open is the SAP Concur service status dashboard. It displays known and widespread outages and incidents for select SAP Concur services and all data centers. Concur Open displays the current service status as well as incident history for the past 20 days.

Personalized Concur Open became available on September 11.

With the release, new functionality will be added to Concur Open. SAP Concur users will be able to log in to a personalized view of Concur Open and:

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

NOTE: Personalized Concur Open will be available ***in addition to*** Concur Open. Users can continue to access Concur Open and view service availability.

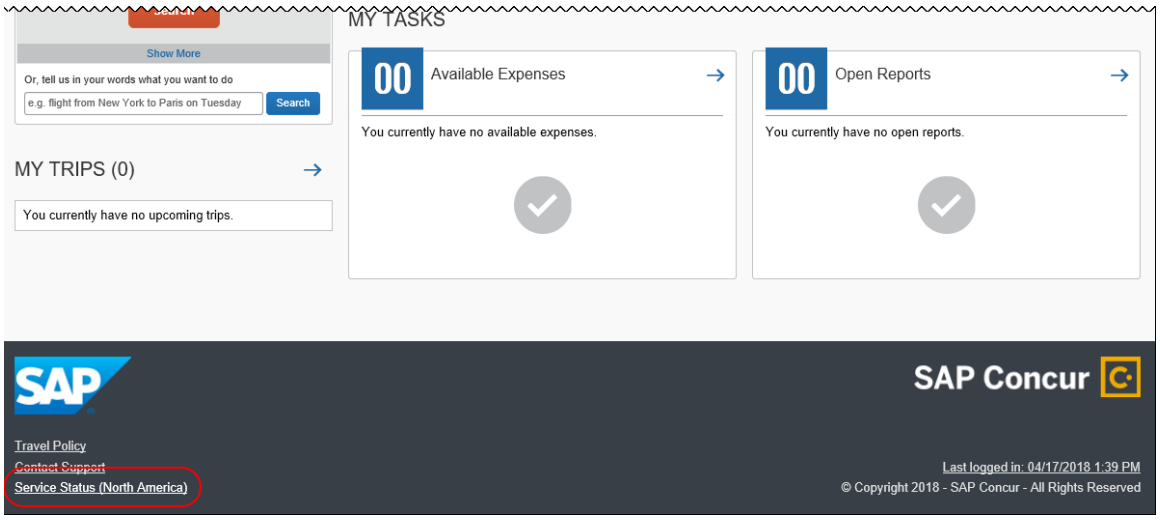
BUSINESS PURPOSE / CLIENT BENEFIT

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

What the User Sees – Access Concur Open

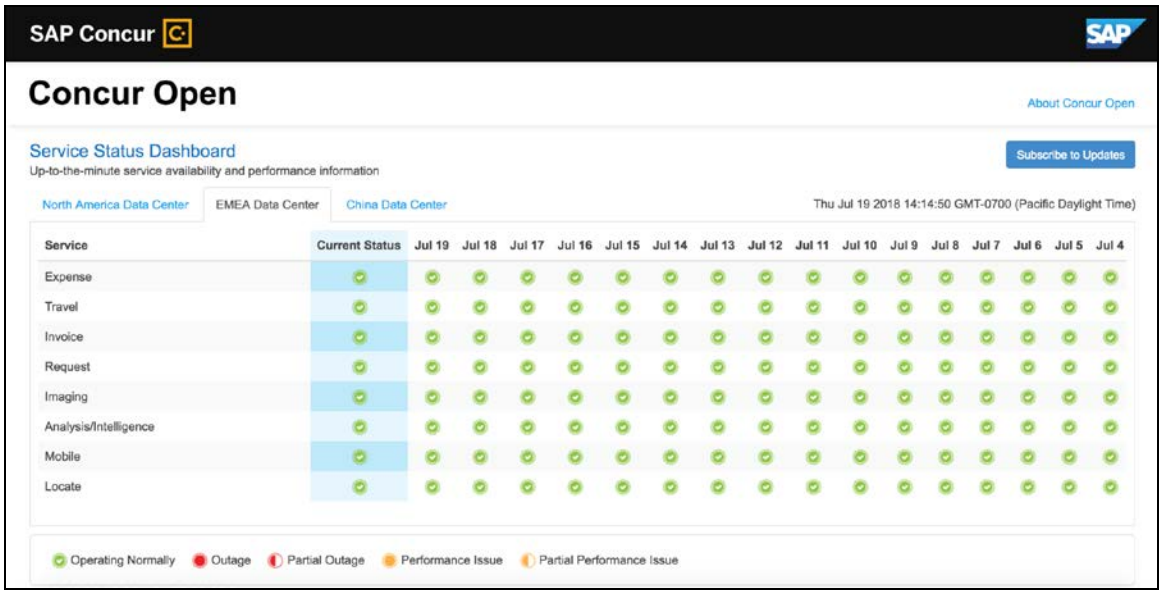
Users can access Concur Open two ways:

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



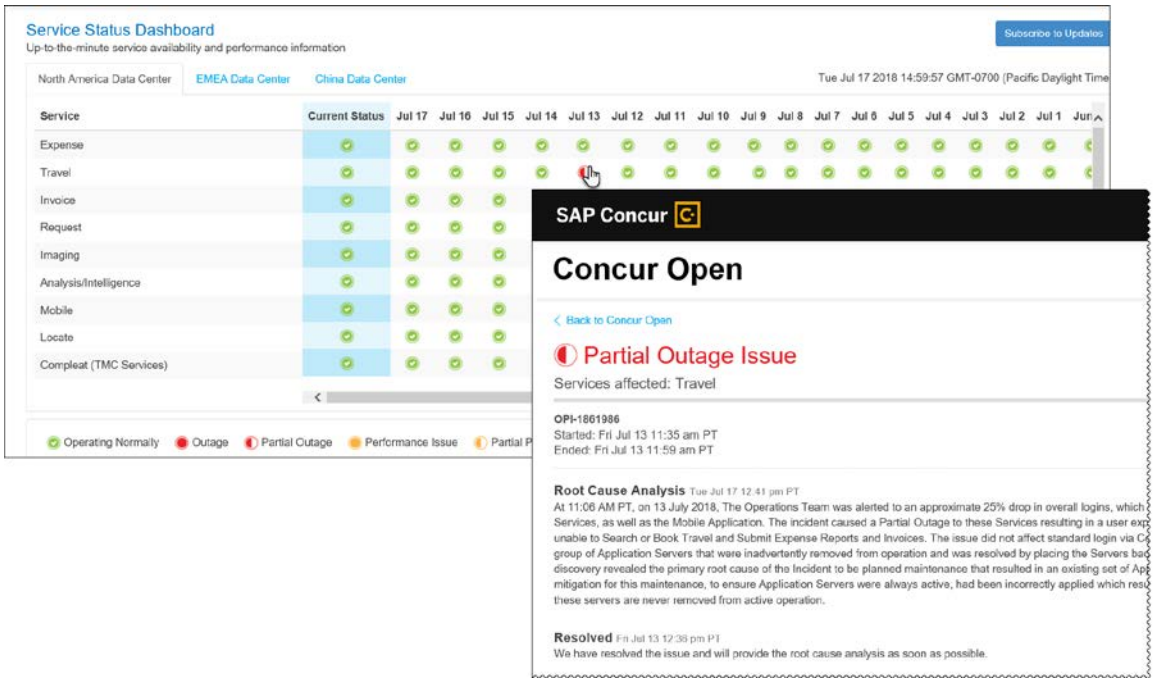
Concur Open appears.

What the User Sees – Current View



In Concur Open, the user sees all data center tabs, the service activity (up to the previous 20 days), and the service legend (bottom of the page).

The user can click an icon to review information about service activity.

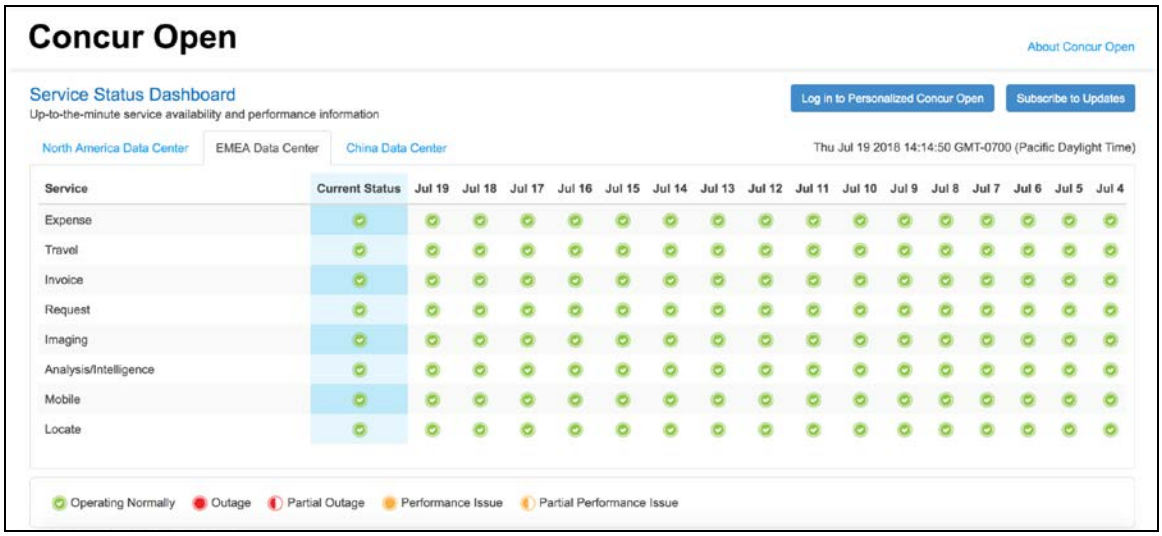


The user can click **Subscribe to Updates** (upper-right corner) to request notifications for service and incident changes.

What the User Sees – New Personalized View and Process

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

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



On the main page, the user can see all data centers and services and can use the **Subscribe to Updates** button – just like they currently do.

With the release of Personalized Concur Open, the main change is that the **Log in to Personalized Concur Open** button also appears on the main page. Whether the user accesses Concur Open via the public site (https://open.concur.com) or after signing in to SAP Concur, navigating to the personalized view requires an SAP Concur sign in.

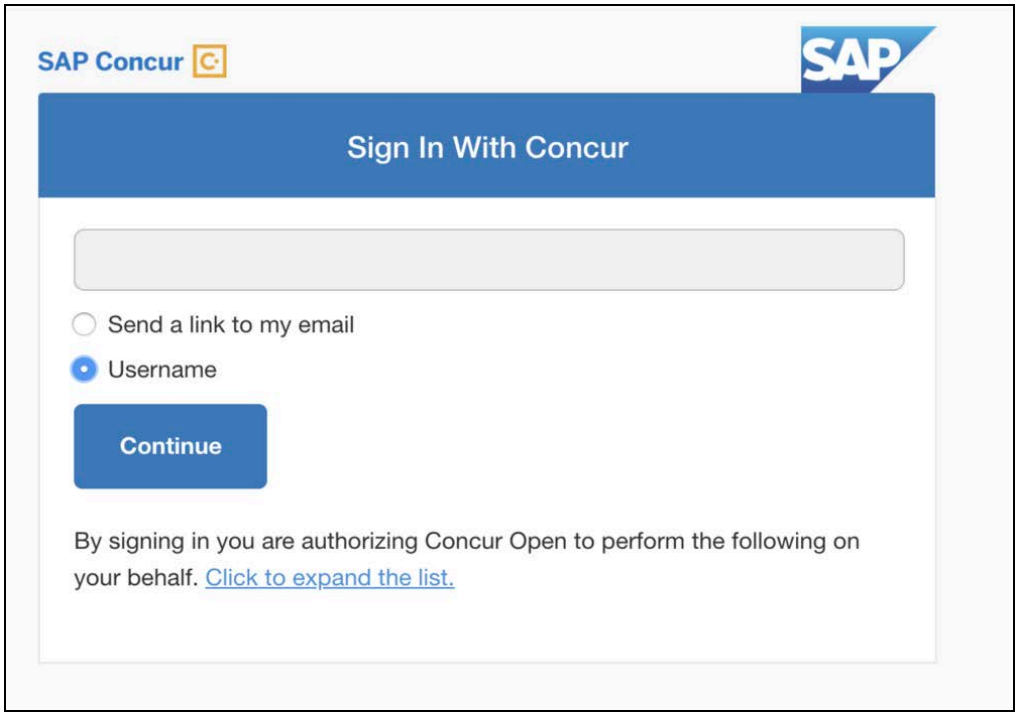
SIGN IN TO THE PERSONALIZED VIEW

The personalized view does not require a new username/password. Users sign in with their existing SAP Concur credentials.

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

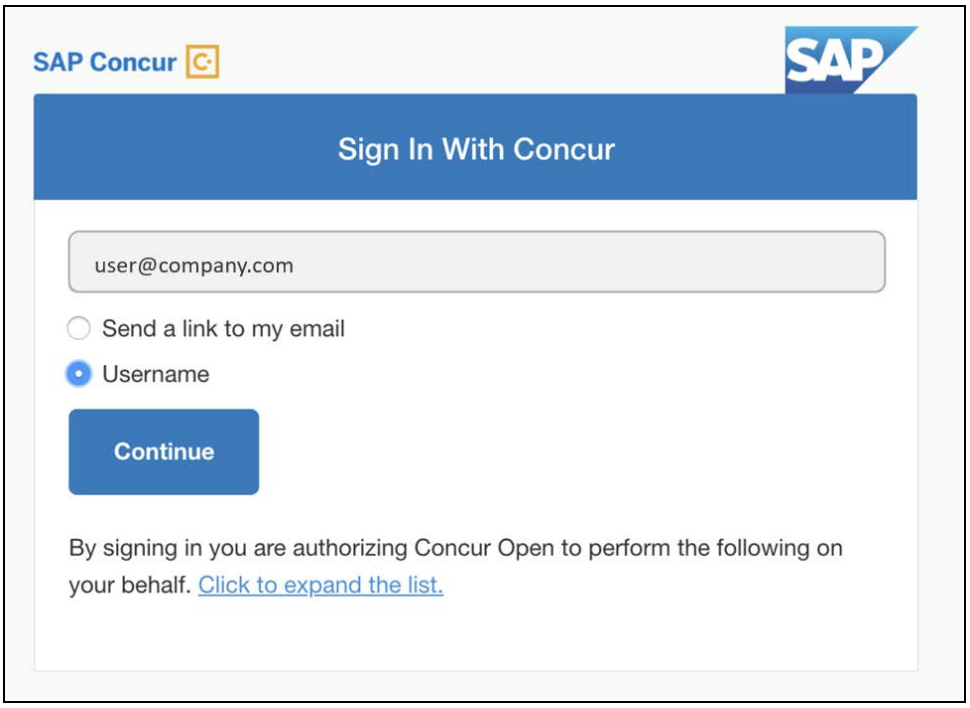
On the main page, the user clicks the **Log in to Personalized Concur Open** button.

The **Sign In With Concur** page appears.

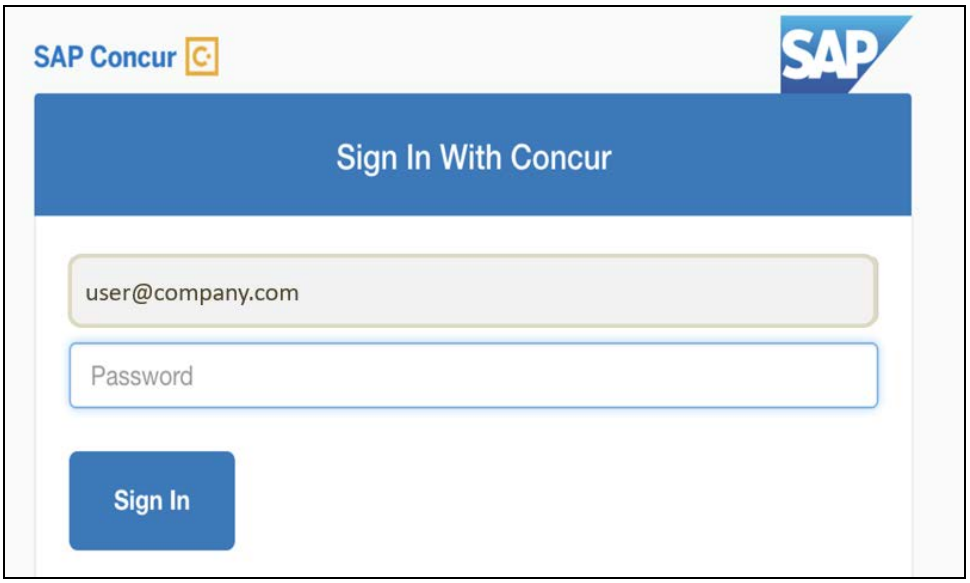


Then, depending on the user's normal sign-in procedure:

- **Username and password:** If the user signs in to SAP Concur using username and password, the user enters their username, clicks **Username** (if necessary), and clicks **Continue**.

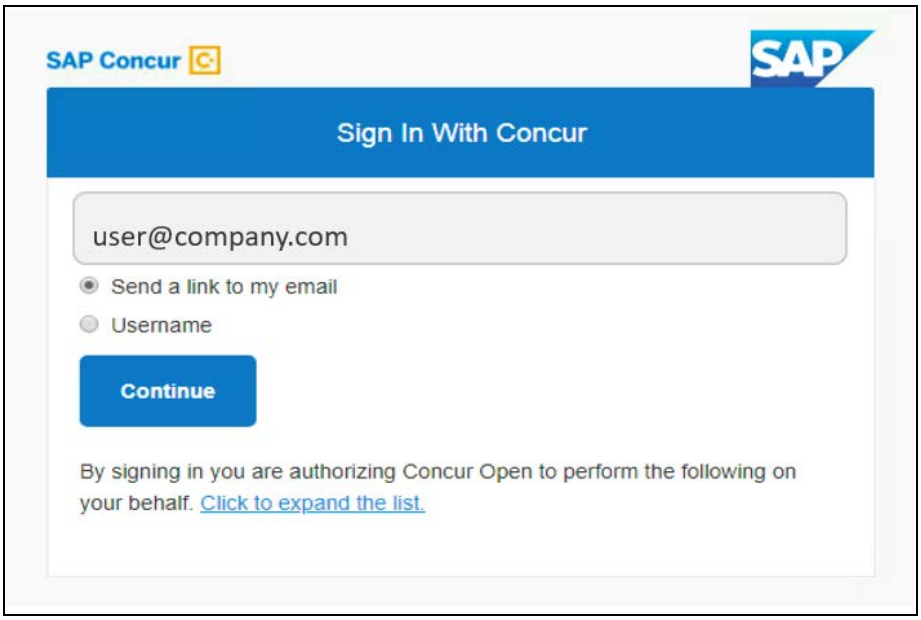


The following page appears.



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

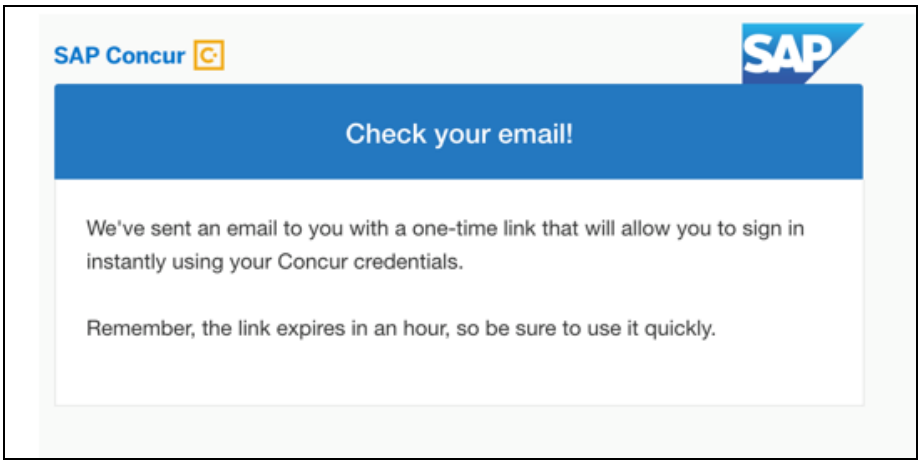
SSO: If the user does not know their SAP Concur sign-in credentials (for example, if the user's company uses SSO to access SAP Concur services), the user enters their email address, clicks **Send a link to my email**, and then clicks **Continue**.



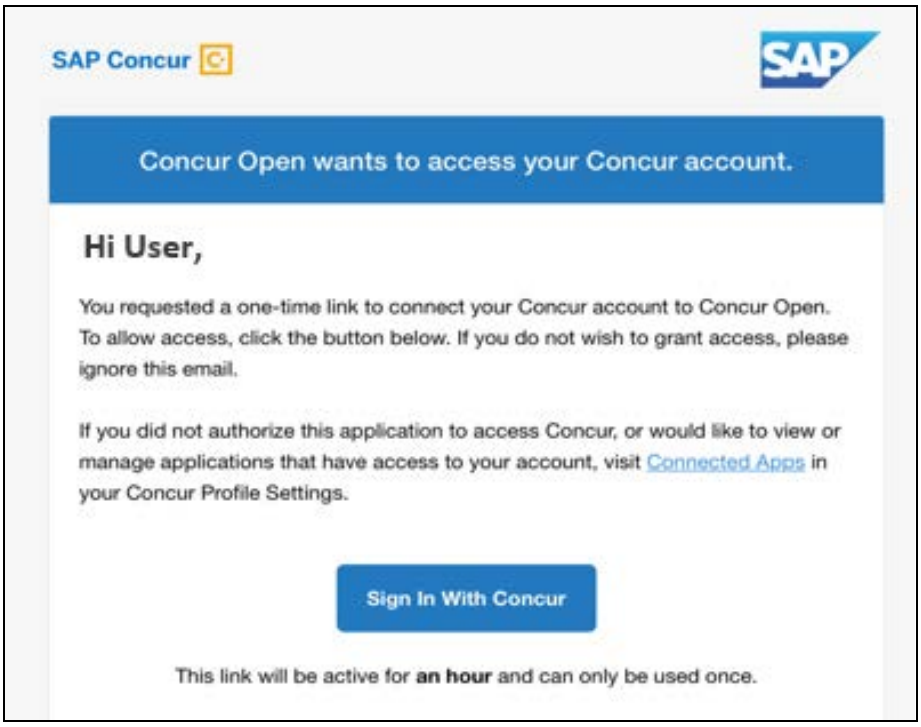
SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.

For more information, refer to *SSO – More About Email Addresses in Profile* section.

The following message appears:



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


SAP Concur

Concur Open wants to access your Concur account.

Hi User,

You requested a one-time link to connect your Concur account to Concur Open. To allow access, click the button below. If you do not wish to grant access, please ignore this email.

If you did not authorize this application to access Concur, or would like to view or manage applications that have access to your account, visit Connected Apps in your Concur Profile Settings.

Sign In With Concur

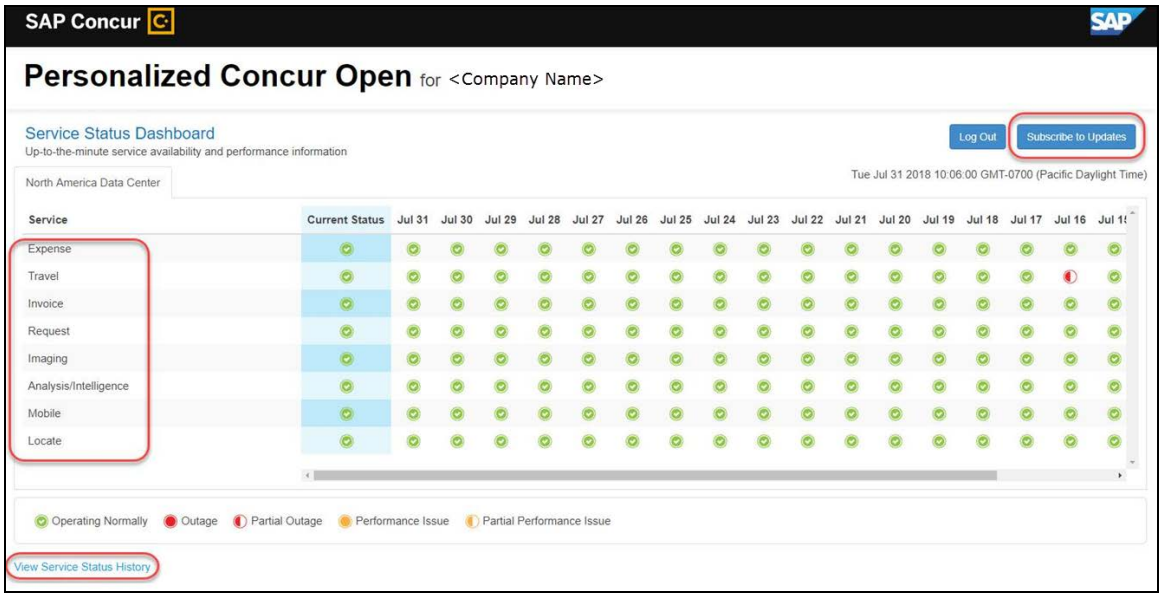
This link will be active for **an hour** and can only be used once.

The user clicks **Sign In With Concur**. The user is then directed to the personalized view.

NOTE: The ***one-time*** link is active for ***one hour***. If the user does not click the link within an hour of it being generated, then the user must request another token.

📖 For more information, refer to the *User Remains Signed In* section.

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

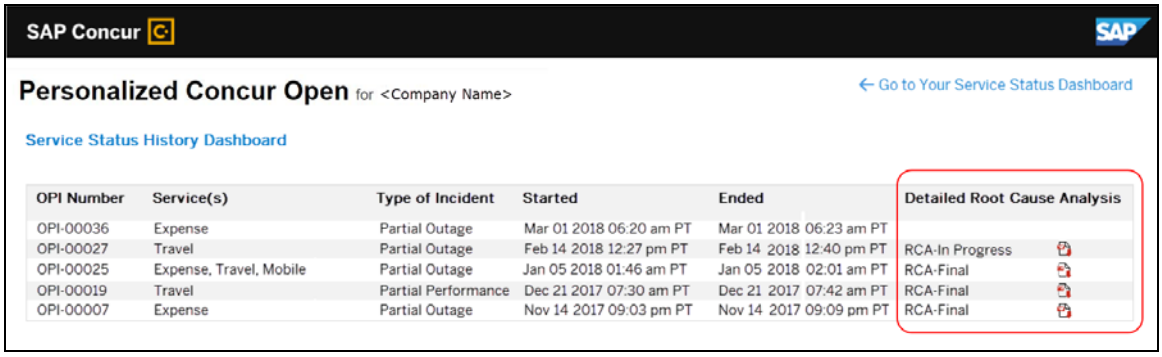


On the **Service Status Dashboard** page, the user can:

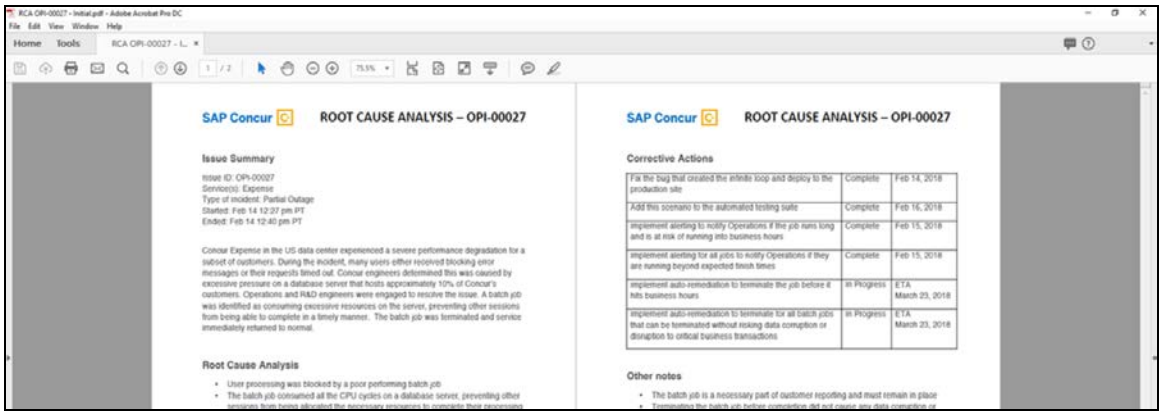
- View:
  - **Status of SAP Concur services:** On this personalized page, the list of SAP Concur services includes ***only*** those that the user's company uses.
  - **Service history and incident analysis that applies to their company:** SAP Concur employs existing "targeting" logic to determine the incidents that apply to the specific company.
- Subscribe to updates

VIEW SERVICE HISTORY AND INCIDENT ANALYSIS

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



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

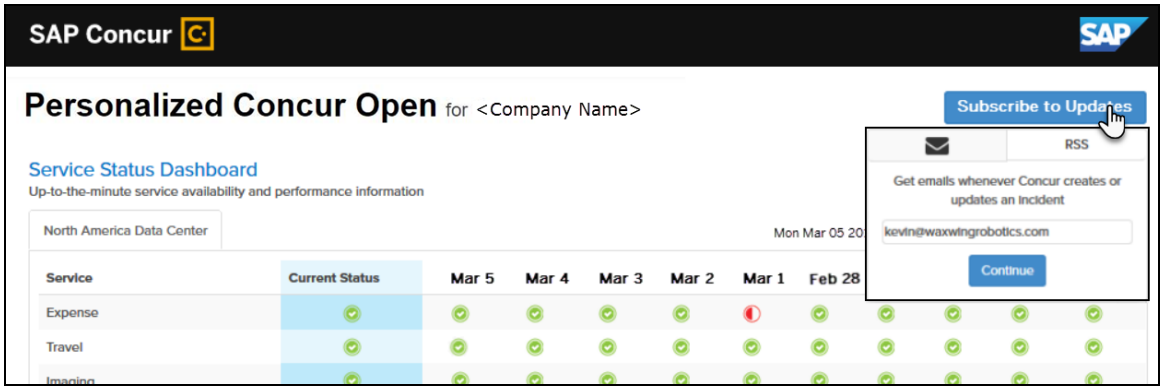


NOTE: The detailed root cause PDFs will be available starting around the date that the personalized view becomes available. The service history (start/stop dates and times, type of incident, etc.) will be displayed for the activity of the last two years. However, the root cause analysis PDFs will not be available for every incident and will only be available on a go-forward basis.

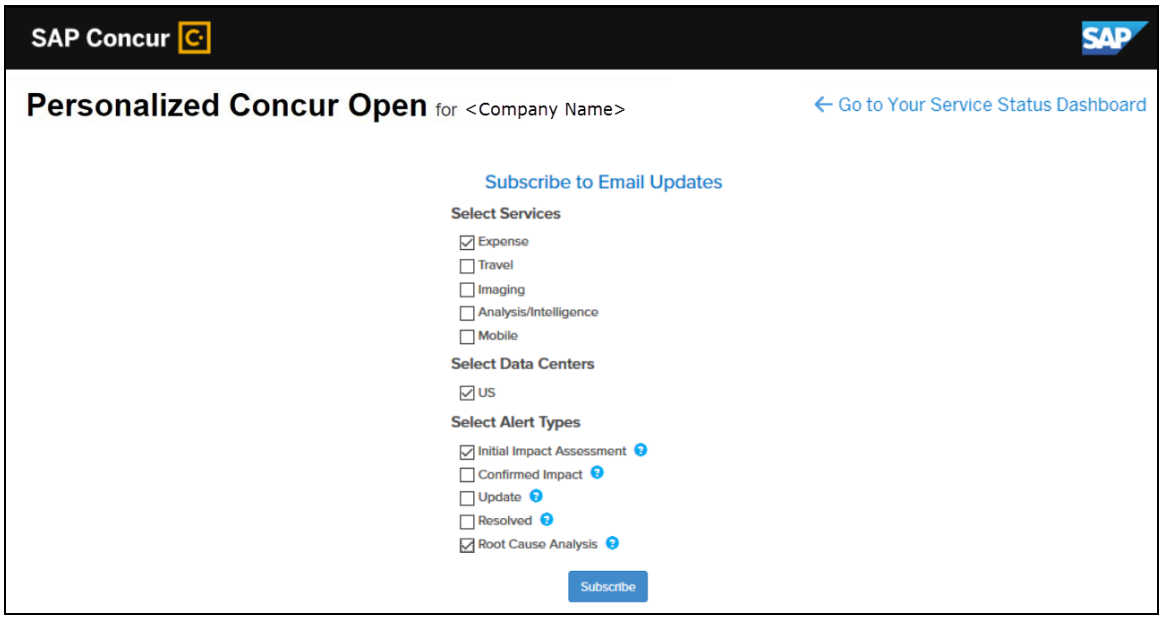
The user clicks **Go to Your Service Status Dashboard** to return to the personalized main page.

SUBSCRIBE TO UPDATES

On the **Service Status Dashboard** page, the user clicks **Subscribe to Updates** to request notifications via email or RSS feed. To subscribe to email notifications, the user clicks the envelope icon (if necessary) and then enters their email address.

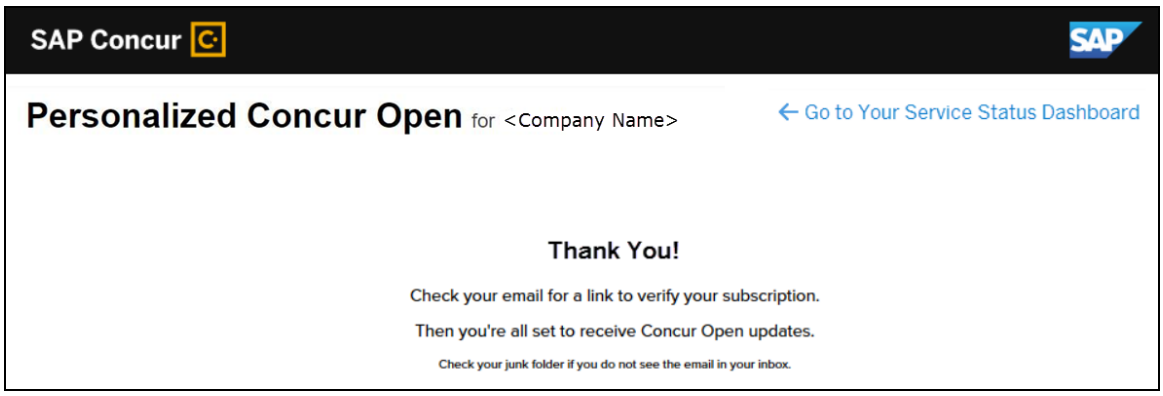


The user clicks **Continue,** and the following page appears.



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

A confirmation message appears.



User Remains Signed In

All users – regardless of whether they signed in via user name/password or via SSO email token – automatically remain signed in for 30 days (via a cookie). During that 30-day period, whether the user enters directly (https://open.concur.com) or they click **Service Status** in the lower-left corner of the SAP Concur screen, they are directed to the generic Concur Open page. When they click **Log in to Personalized Concur Open**, users bypass the login page and go directly to the **Personalized Concur Open** page.

If, during the 30-day period, the user wants to log out, they click **Log Out** on the **Service Status Dashboard** page. (Clearing the cache also terminates the 30-day period.)

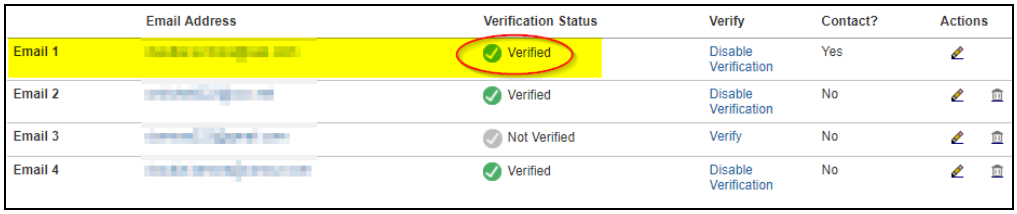
If, during the 30-day period, the customer acquires additional services from SAP Concur, the user must sign out and sign back in, to see the new service information.

SSO - More About Email Addresses in Profile

As described above, for SSO users who access Personalized Concur Open via the email token, SAP Concur authenticates the user by comparing the email address entered by the user to the email address in the user's SAP Concur profile.

Note the following:

- The email address that the user enters:
  - Must match the email address in the **Email 1** field in their SAP Concur profile; **Email 1** must be verified.



	Email Address	Verification Status	Verify	Contact?	Actions
Email 1		Verified	Disable Verification	Yes	
Email 2		Verified	Disable Verification	No	
Email 3		Not Verified	Verify	No	
Email 4		Verified	Disable Verification	No	

  - Must be unique to that user; it cannot be shared with multiple people or logins in their company

NOTE: Users can have duplicate (non-unique) email addresses in their profile but ***not*** in the **Email 1** field. Email 1 must be unique.

If the email associated to multiple concur profiles, the notification below might be sent to the user.

Dear Concur User,

An attempt to login or connect to a partner application was made using this email address. We could not authorize this request because of an error. This is most likely because this email address is found to be a duplicate in our system. Please contact your administrator to resolve this issue.

If you did not request to be connected to any partner application, please ignore this email.

Best practice for SSO users – before requesting the token email – is to ensure Email 1 in Profile is accurate and unique.

- If an employee no longer has access to SAP Concur (for example, leaves the company), that employee can no longer access the personalized view. To access the personalized view, the user must have a Concur login or an email address in Profile. An inactive user or terminated employee has neither of those things.

Existing Subscription Information

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

For those with subscriptions ***before*** the release of the new Personalized Concur Open:

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

  NOTE: When the new view becomes available, it is considered best practice to sign in to the subscription page and verify the selected options for accuracy.

- If a user subscribed using their personal email (which means SAP Concur cannot establish an SAP Concur customer match), then SAP Concur will introduce the user (via email) to Personalized Concur Open.

Configuration / Feature Activation

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

Planned Changes

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

Invoice

Planned Changes Payment Request(s) Renamed to Invoice(s)

Overview

In a future release, SAP Concur will replace instances of the term "payment request" and its iterations with the term "invoice" and its iterations. These changes will be made in the user interface, the Invoice documentation, and any other SAP Concur product documentation where it appears.

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps to ensure that the terminology used in SAP Concur is consistent with industry standard terminology.

Configuration / Feature Activation

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

NOTE: The terminology change will occur when the new user interface for Invoice becomes generally available.

📖 For more information about the new user interface for Invoice, refer to the *New User Interface for Invoice available in Early Access Release* release note in the *Release Notes* section.

Product Settings

Planned Changes Cost Tracking to Have New Look, New Name

Overview

The **Cost Tracking** page in Product Settings will soon have a new look and flow, and a new name. All existing functionality will remain with improved usability for field setup and management.

The new enhancements include the following:

- The **Cost Tracking** page will be renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page will allow client admins to manage custom fields starting from one page. **Linked lists** will be renamed to **Multi-level lists**.
- A new **Add New Field** page will also be accessible from the **Manage Custom Fields** page. The **Add New Field** page will allow client admins to create fields by selecting the field's type and then selecting field options. Client admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end user experience.

Configuration / Feature Activation

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

📖 For more information, refer to the *Shared: Cost Tracking Setup Guide*.

NOTE: Additional information will be available in future release notes.

Client Notifications

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

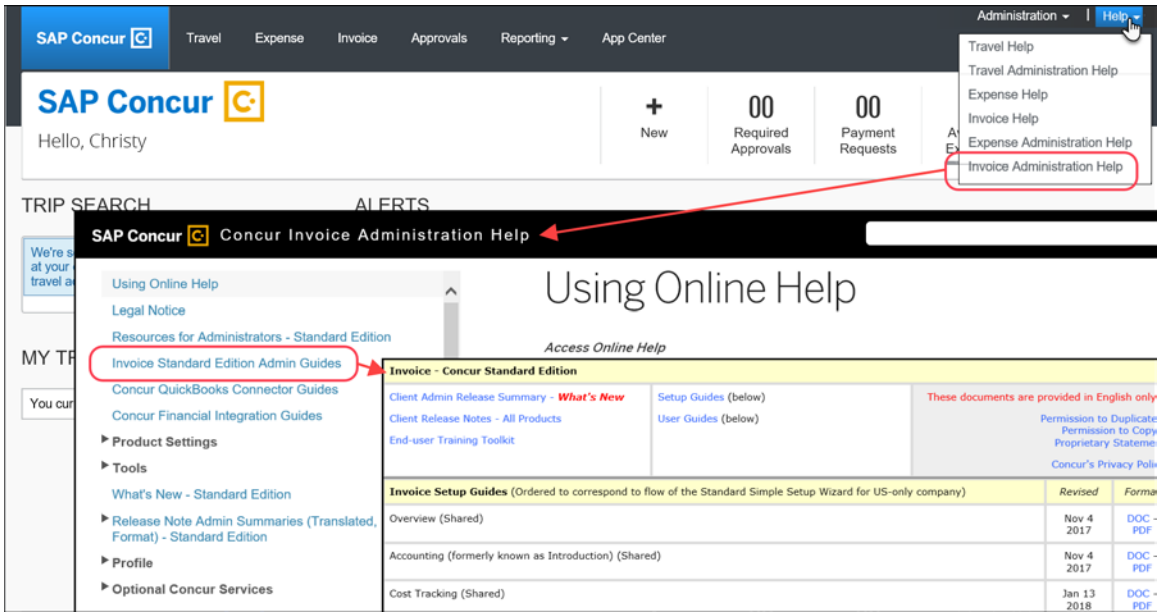
The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

A user who is assigned an admin role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through **Invoice Administration Help**.

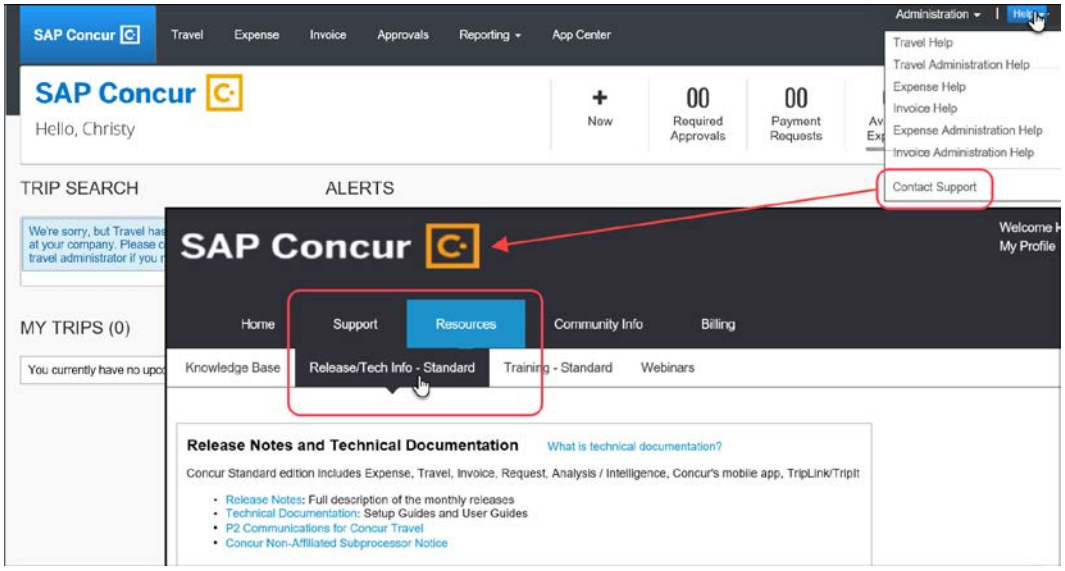


Concur Support Portal – Selected Users

Users who are assigned the correct Concur Support Portal permissions can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through the Concur Support Portal

To access the Concur Support Portal (for users with the correct permissions)

1. Click **Help > Contact Support**.
2. On the support page, click **Resources > Release/Tech Info**.



SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: October 20, 2018 Initial Post: Friday, October 19, 12:30 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Concur Invoice functionality for the standard edition.

Invoice

New Expense Type Name Field Available in the Payment Request Import

Overview

With this release, SAP Concur has added a new field, **Expense Type Name**, to the assisted Payment Request Import. Clients will now have an alternative way to assign an expense type to an employee when they import data.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature gives clients an alternative and easier way to assign an expense type name when importing data.

Configuration / Feature Activation

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

📖 For more information, refer to the *Invoice: Payment Request Import V2 (Current) Specification*.

Payment Request API Updated

Overview

A new field, **Matched Purchase Order Receipts**, has been added to the GET method of the Invoice v3 Payment Request API.

BUSINESS PURPOSE / CLIENT BENEFIT

The new **Matched Purchase Order Receipts** field returns an array of the PO goods receipt numbers that are matched to the invoice line in Concur Invoice. This information helps clients match the correct records in their external system when they post the invoices to the system.

Example Response

```
<MatchedPurchaseOrderReceipts>
      <MatchedPurchaseOrderReceipt>
            <GoodsReceiptNumber>Receipt2</GoodsReceiptNumber>
      </MatchedPurchaseOrderReceipt>
      <MatchedPurchaseOrderReceipt>
            <GoodsReceiptNumber>Receipt1</GoodsReceiptNumber>
      </MatchedPurchaseOrderReceipt>
      <MatchedPurchaseOrderReceipt>
            <GoodsReceiptNumber>Receipt3</GoodsReceiptNumber>
      </MatchedPurchaseOrderReceipt>
</MatchedPurchaseOrderReceipts>
```

Configuration / Feature Activation

This field is automatically available; there are no additional configuration or activation steps.

Purchase Order

Purchase Order Receipts API Updated

Overview

Two new query parameters have been added to the GET and DELETE methods of the Invoice v3 Purchase Order Receipts API, **Purchase Order Number** and **Line Item External ID**. These new parameters enable clients to better target the goods receipt records they want to retrieve or delete from the system.

With the addition of these new parameters, the following query parameters are now available through the GET and DELETE methods:

- **Goods Receipts Number**
  This pre-existing parameter can be used alone or in combination with one or both of the other parameters.

- **Purchase Order Number**
  This new parameter can be used alone or in combination with one or both of the other parameters.

- **Line Item External ID**
  This new parameter cannot be used alone. It must be used in combination with one or both of the other parameters.

NOTE: You must supply at least one query parameter when retrieving goods receipts through the GET or DELETE methods. The **Line Item External ID** must be used in combination with either the **Goods Receipt Number** or **Purchase Order Number** parameters. All three parameters can also be used in combination.

BUSINESS PURPOSE / CLIENT BENEFIT

These new API parameters provide more flexible and precise handling of goods receipt records through the Invoice v3 Purchase Order Receipts API.

Configuration / Feature Activation

The new parameters are automatically available; there are no additional configuration or activation steps.

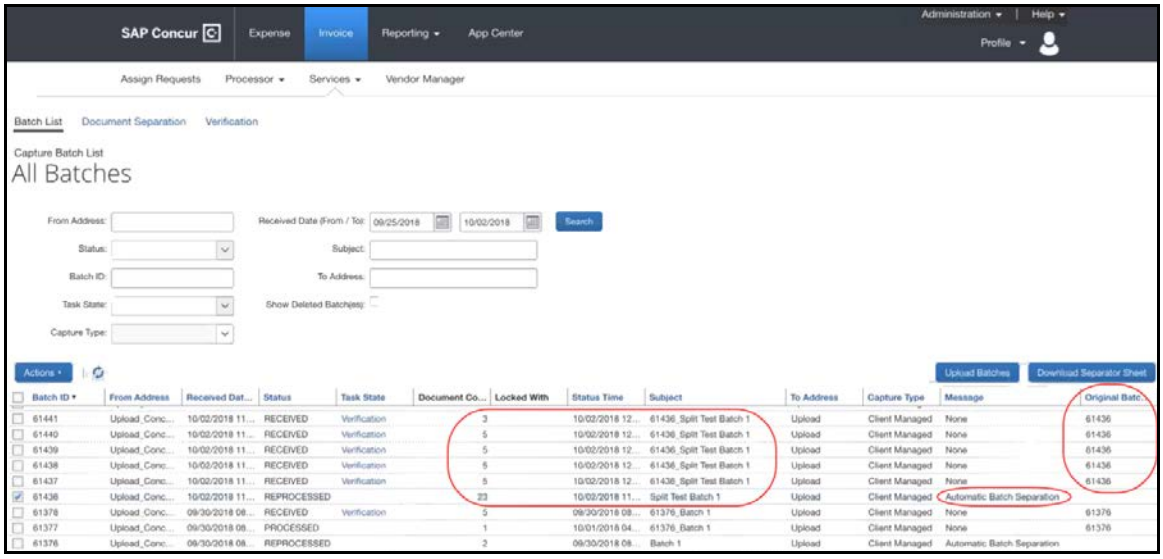
Capture Processing

Large Batches Now Divided Into Multiple Smaller Batches

Overview

With this release, large batches of invoices (more than 100 for client-managed processing) will automatically be divided into multiple smaller batches (100 at a time) for easier processing.

If this happens, users will receive an automatic batch separation message on the **Batch List** page. In addition, they can see which batches belong together by looking at the original batch number.

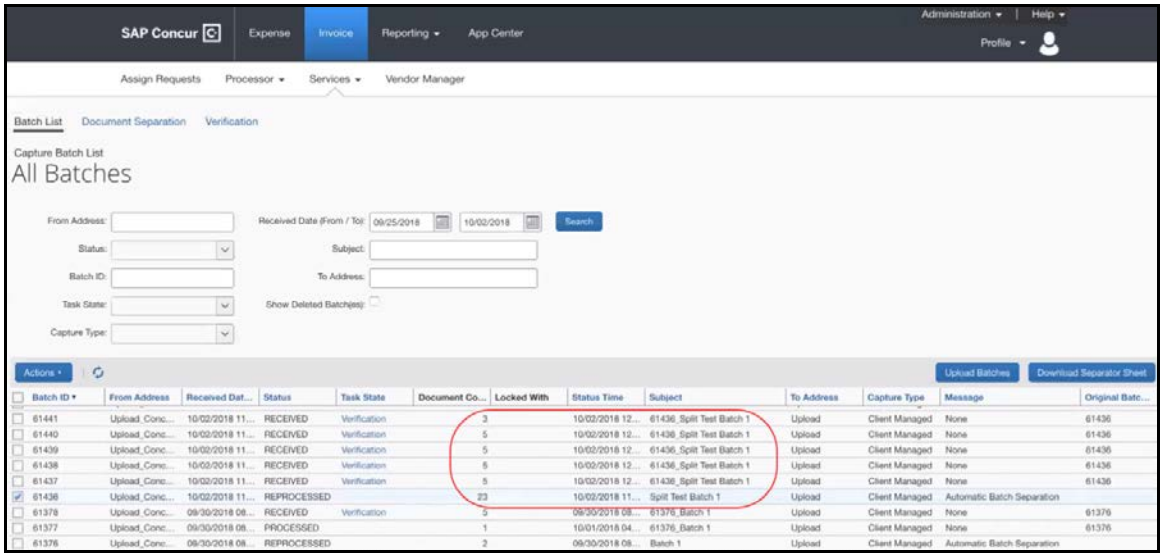


BUSINESS PURPOSE / CLIENT BENEFIT

This feature makes the verification task of processing invoices easier for clients, since large batches of invoices are divided into multiple smaller batches.

What the Invoice Verifier Sees

On the **Batch List** page, a user with the Invoice Verifier role will see batches over a certain number automatically split into multiple smaller batches.



Configuration / Feature Activation

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

For more information, refer to the *Invoice: Capture Processing (Client-Managed) User Guide for Concur Standard Edition*.

Email Attachments No Longer Sent out With Email Exception

Overview

In the August release, Concur Invoice modified the Email Exception feature, so that exception emails that are sent out to clients no longer contain the original attached email.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature ensures clients only receive information that is relevant to them.

Configuration / Feature Activation

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

📖 For more information, refer to the *Invoice: Capture Processing (Client-Managed) User Guide for Concur Standard Edition*.

SAP Concur Email

Updated Email Format

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, consistent look and feel across all SAP Concur services. The change will be introduced gradually. Some users will see the updated format immediately; some will see it over the next few months.

The email content has not changed – just the look and feel.

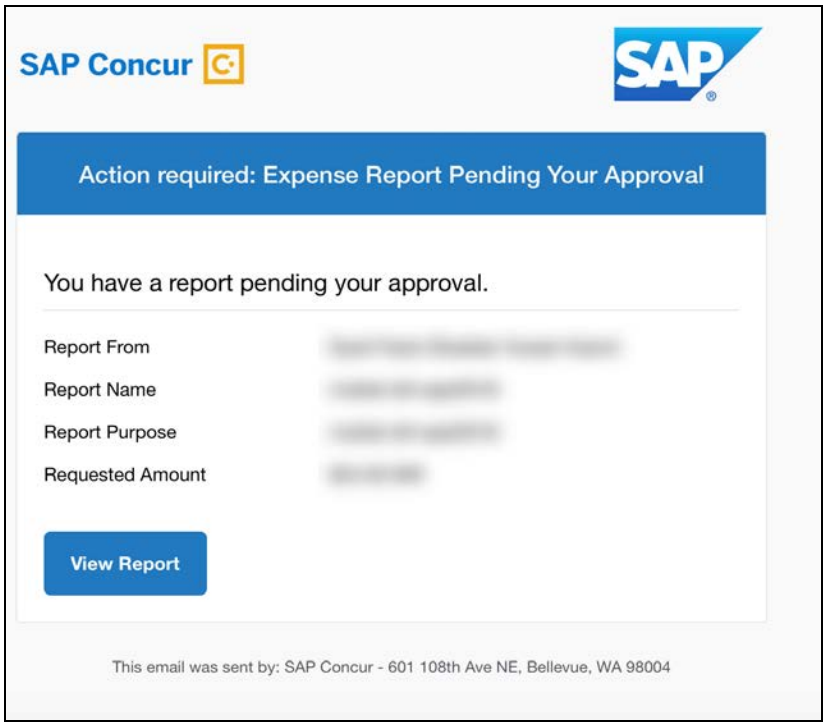
BUSINESS PURPOSE / CLIENT BENEFIT

The intent of these changes is to provide a consistent, updated look for users.

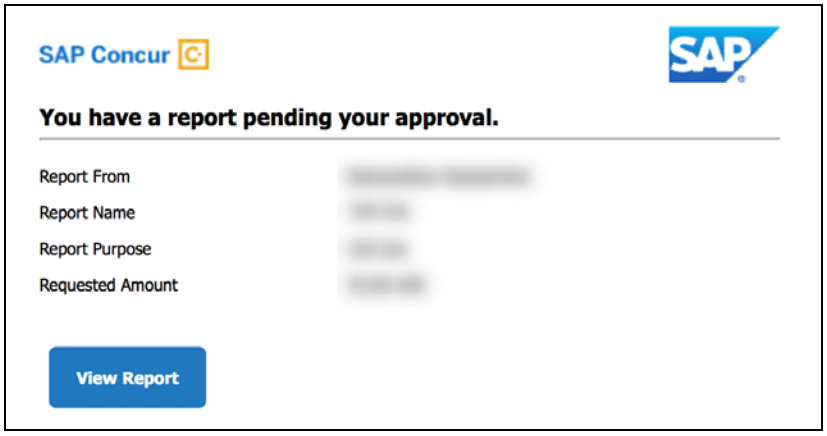
What the User Sees

The report approval email is shown below. Over time, all emails generated from SAP Concur will have a similar look.

New email format



Current email format



Configuration / Feature Activation

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

Email Infrastructure Change - Whitelist IP Addresses

Overview

SAP Concur is transitioning to a new email infrastructure for outbound emails from our products to SAP Concur users. Because of this, companies who filter inbound email based on the sending IP address must whitelist new IP addresses to ensure that their users receive email from SAP Concur.

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. Please work with your email server management team to ensure any required whitelists for IP addresses are updated so that your users continue to receive SAP Concur emails without interruptions.

Configuration / Feature Activation

Companies that filter inbound emails based on the sending IP address should obtain the IP address from SAP Concur support and modify their whitelists.

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.

Invoice

Planned Changes New User Interface for Invoice Soon Ready for Client Testing

Overview

In July, SAP Concur introduced the first version of a new user interface for Invoice Early Access clients. Version 1.0 of the new user interface is targeted at the Accounts Payable (AP) user who is constantly monitoring the health of the Invoice lifecycle within the system. With a new AP landing page, concepts of "call to action" and "work to zero" are being brought to the forefront to better inform AP users to ensure they are working on the highest priority task.

Soon, the new user interface will be available to all clients through a setting in Invoice Preferences, which will enable them to test this new look and feel.

NOTE: Contact your SAP Concur representative for more information about the Early Access program.

BUSINESS PURPOSE / CLIENT BENEFIT

The new Invoice user interface enables clients to work more efficiently and provides them greater visibility into their invoices in flight.

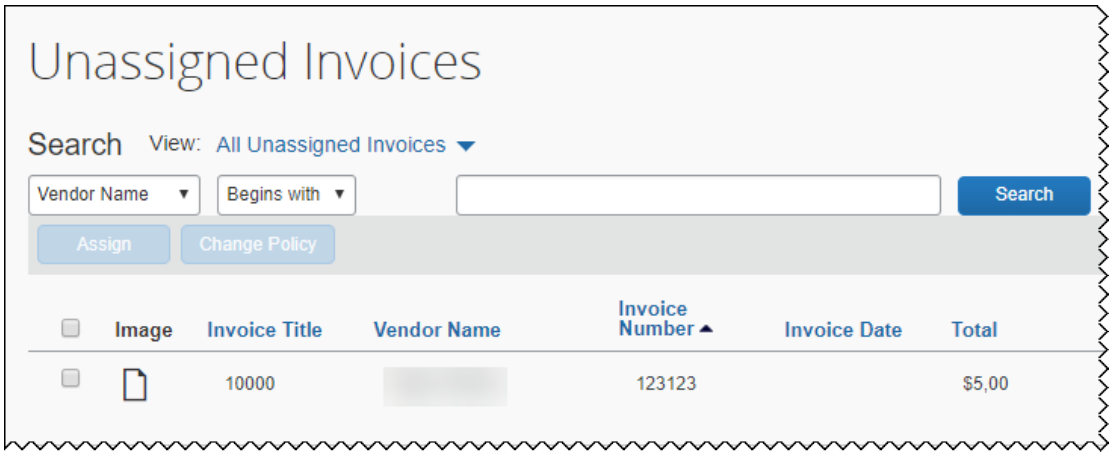
What the Invoice AP User and Invoice Processor See

The Invoice AP User and the Invoice Processor will now land on a new **Invoice Manager** page that provides key information about all active invoices.

On the **Invoice Manager** tab, the Invoice AP User and Invoice Processor see new tiles and new sections including visibility into **Active Invoices** and **My Tasks** sections.

The Invoice Processor also sees a newly designed **Unassigned Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.

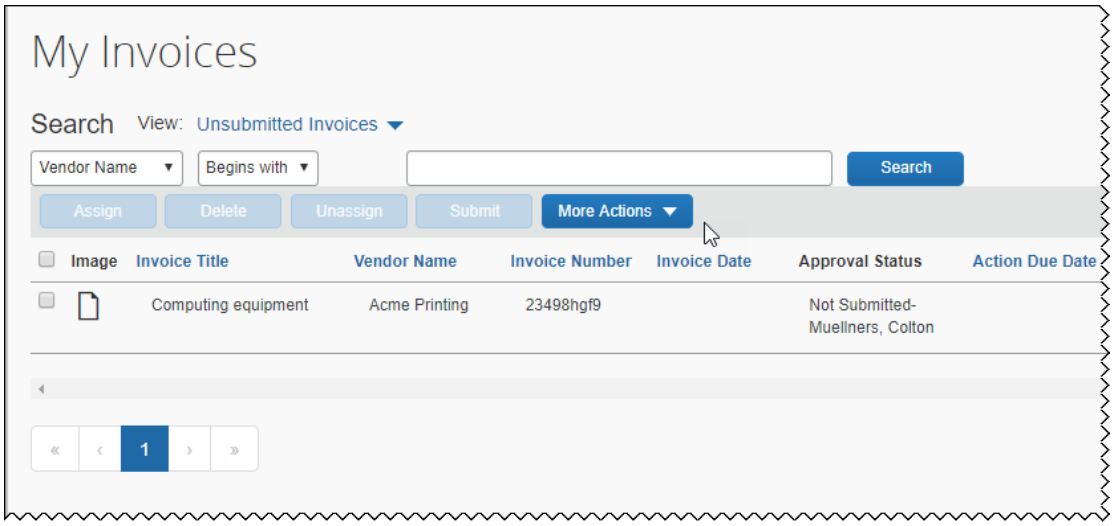
Unassigned Invoices



What the Invoice User Sees

Invoice users who have access to **My Requests**, will see a newly designed **My Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.

My Invoices



Configuration / Feature Activation

Clients must contact their SAP Concur representative to activate this feature.

NOTE: More information about the new Invoice user interface will be made available in future release notes.

Planned Changes Payment Request(s) Renamed to Invoice(s)

Overview

In a future release, SAP Concur will replace instances of the term "payment request" and its iterations with the term "invoice" and its iterations. These changes will be made in the user interface, the Invoice documentation, and in all other SAP Concur product documentation where it appears.

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps to ensure that the terminology used in SAP Concur is consistent with industry standard terminology.

Configuration / Feature Activation

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

NOTE: The terminology change will occur when the new user interface for Invoice becomes generally available.

📖 For more information about the new user interface for Invoice, refer to the ***Planned Changes** New User Interface for Invoice Soon Ready for Client Testing* release note in this document.

Purchase Order

Planned Changes Import Now for PO and PO Receipt Imports

Overview

The Import Now feature enables clients to import PO and PO receipt files into Invoice immediately without having to wait for an overnight scheduled import. This is beneficial for clients who need to import POs and PO receipts and work with them in the Concur Invoice product the same day they are created externally. This also allows clients to do multiple PO and PO receipt imports a day for more synchronized and up-to-date data.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature gives clients control over when and how frequently to import POs and PO receipts into Concur Invoice.

Configuration / Feature Activation

More information about configuring this feature will be available in future release notes.

Purchase Request

Planned Changes New v4 Purchase Request API

Overview

At a future date, SAP Concur will make a new Purchase Request API available from the SAP Concur Developer Center.

BUSINESS PURPOSE / CLIENT BENEFIT

The Purchase Request API will enable developers to create and automatically submit purchase requests for preauthorization leveraging external data, and to retrieve purchase request numbers and statuses by using the POST and GET methods.

Configuration / Feature Activation

When the new v4 Purchase Request API becomes generally available, information about the API will be provided on the SAP Concur Developer Center.

Vendor Management

Planned Change Audit Trail for Vendor Changes

Overview

In a future release, clients with the Create and Approve Vendors feature enabled will be able to track changes to a vendor through the **Audit Trail** page within the vendor record in Vendor Manager. For example, when a vendor is approved or updated by the Vendor Manager, those actions will appear in the audit trail.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables users with the Vendor Manager role to view details about changes to a vendor within the **Audit Trail** page that is available from the **Actions** menu within a vendor record.

Configuration / Feature Activation

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

Product Settings

Planned Changes (USA) New Mileage Configuration

Overview

SAP Concur Standard Editions of Expense, Invoice, Travel and Request will soon have a new **Mileage Configuration** page that provides automated updates for government mileage rates. This feature will replace the existing **Mileage Rates** page.

The Mileage Configuration feature has two key benefits:

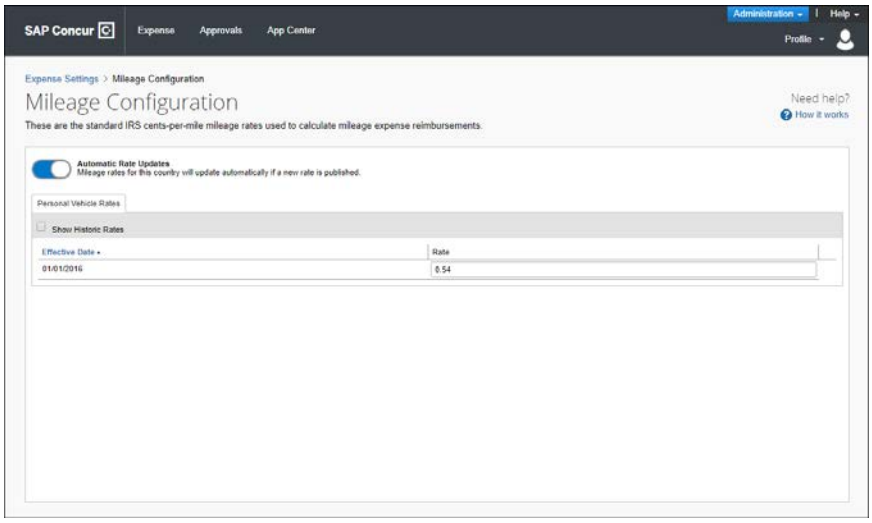
- For a client using government rates, the new mileage service will keep these updated resulting in reduced effort on the client's part to maintain and manage the rates.
- For taxability purposes, the system will record the claimed amount difference between the amount paid using the client rate versus the amount based on the government rate.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature increases the client admin's efficiency when maintaining and managing mileage rates.

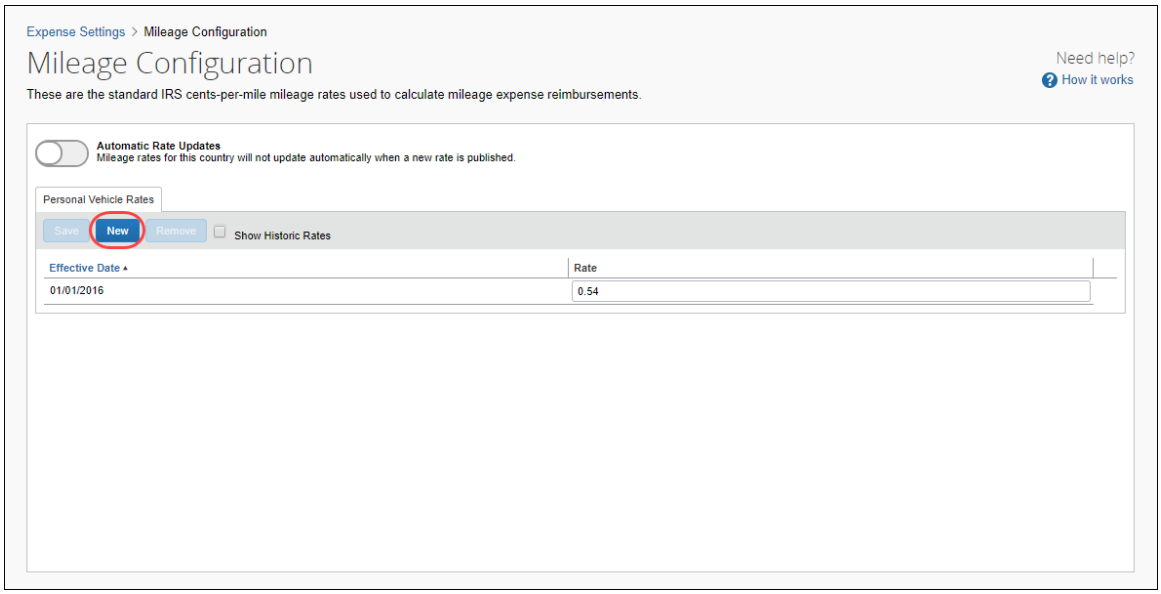
What the Admin Sees

Client admins will see a new **Mileage Configuration** page in Product Settings. If enabled, **Automatic Rate Updates** automatically update new rates for a country when a new rate is published.



As more countries are added, a country list will be added to the **Mileage Configuration** page to accommodate additional countries.

To turn off automated rate updates, admins click **Automatic Rate Updates** and then click **OK**.

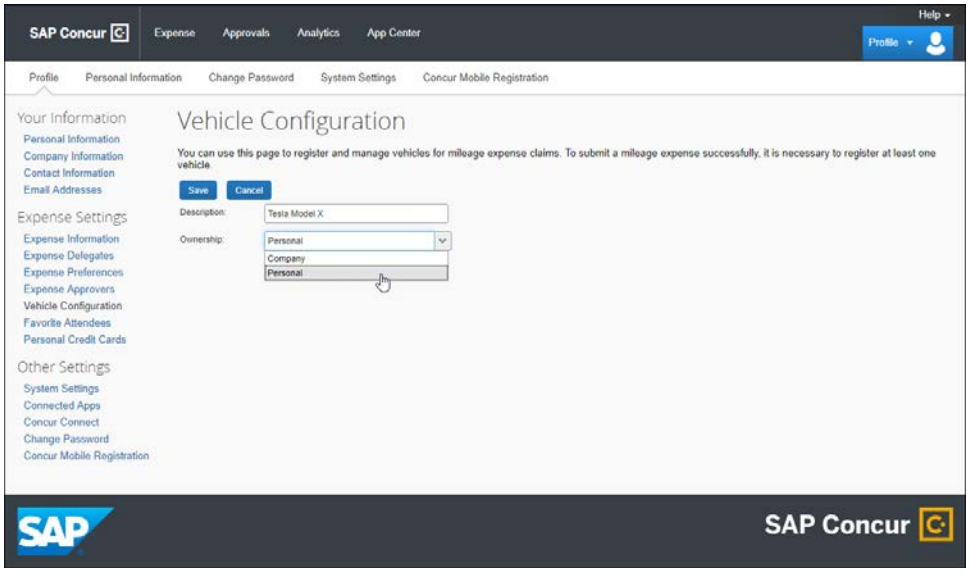


To add additional rates, clients will be able to turn off the automated mileage rate functionality to display the **New** button. Once company rates are entered, they can turn the **Automatic Rate Updates** feature on again.

What the Client Sees

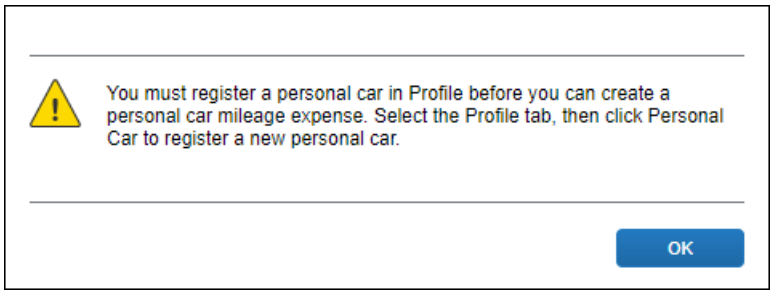
In the past, USA clients did not have to register a vehicle. With the new Mileage Configuration feature, clients will always need to register a vehicle.

Clients will see a new **Vehicle Configuration** page in Profile Settings.



Clients will not be able to submit an expense report containing a mileage expense without first registering a vehicle in Profile Settings. Clients will not see any other changes in the user interface when creating and submitting expense reports.

If a user attempts to submit an expense report with mileage and they have not yet registered a vehicle, a dialog box will appear prompting the user to register a vehicle.



Configuration / Feature Activation

On the **Mileage Configuration** page in Product Settings, click **Automatic Rate Updates** to turn on this feature.

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SSO is currently supported for Concur Expense, Invoice, Request, and Travel. SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur which provides SAP Concur clients with a self-service option for setting up SSO for their organization.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Access To Concur** section of Product Settings.

- Single Sign-On can be managed for Standard Travel if it is bundled with Expense, Invoice, and/or Request.
- For standalone Standard Travel, the Manage Single Sign-On feature will be accessible from the **Travel Settings** page.

Other SAP Concur products and services are outside the scope of this initial release.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides SAP Concur clients with a self-service option for setting up SSO.

Configuration / Feature Activation

Configuration information will be provided in a future release note.

Planned Changes Cost Tracking to Have New Look, New Name

Overview

The **Cost Tracking** page in Product Settings will soon have a new look and flow, and a new name. All existing functionality will remain with improved usability for field setup and management.

The new enhancements include the following:

- The **Cost Tracking** page will be renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page will allow client admins to manage custom fields starting from one page. **Linked lists** will be renamed to **Multi-level lists**.
- A new **Add New Field** page will also be accessible from the **Manage Custom Fields** page. The **Add New Field** page will allow client admins to create fields by selecting the field's type and then selecting field options. Client admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end user experience.

Configuration / Feature Activation

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

NOTE: Additional information will be available in future release notes.

Miscellaneous

Planned Changes Archive Deactivated User Data

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet customer expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for *at least three years*. The archive process moves the deactivated user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

BUSINESS PURPOSE / CLIENT BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for the inactive users' personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that customers are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce the date via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, and admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

A. SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

A. SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – users that have been "marked inactive" in the SAP Concur system. A user must be deactivated for *over 3 years* without having been re-activated to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

A. *For Professional Edition*, the most significant difference would occur in **Company Admin > User Administration**.

However, once user information is archived:

- From within User Administration, if the **Use Travel Advanced Filters** option is selected (enabled), the user will not be visible.
- From within User Administration, if the **Use Expense Advanced Filters** option is selected (enabled), you will be able to see the user in search results as deactivated.
    - If you click the user's name, you will receive an error message: *The selected user exists in the Expense or Invoice application but the user contains conflicting or missing data. Contact Concur Client Support to request help in resolving this error.*
    - If you click the icon in the **Profile** column, you will receive the generic error message.
    - If you click the user's login ID, you will see no historical login information for that user.
- If another user has the Self-Assigning Assistant permission or the user is a Proxy, who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive a "switching user" error message.
- From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the

Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- These users will not have access to any of their past travel history.
- For Expense, the user would have access to their expense history if:
  - That history has not been removed by a Data Retention policy.
  - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

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

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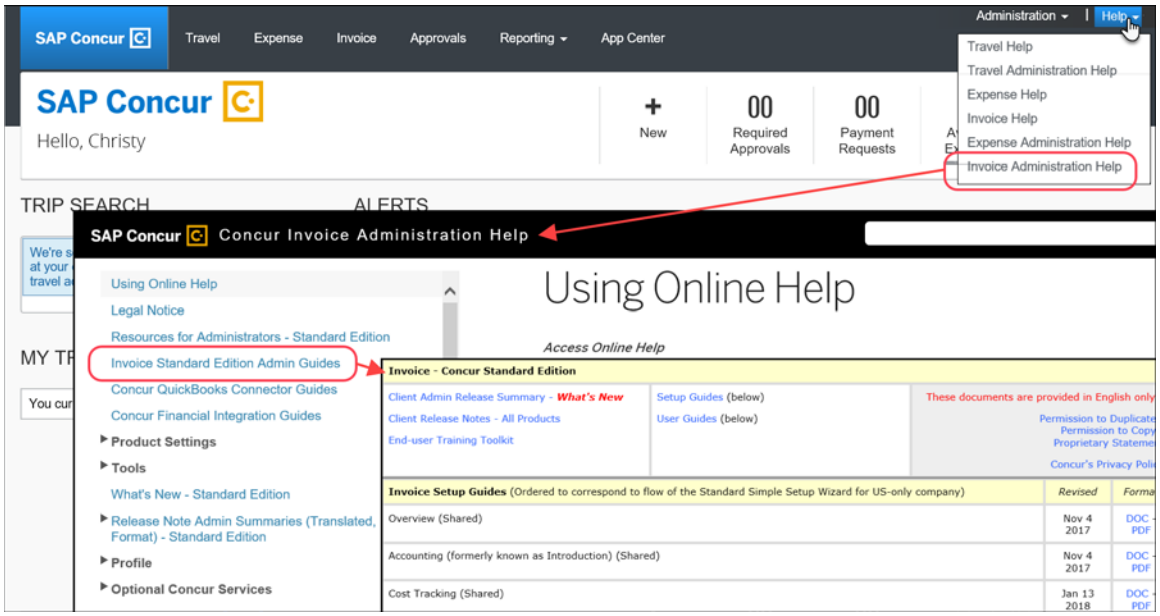

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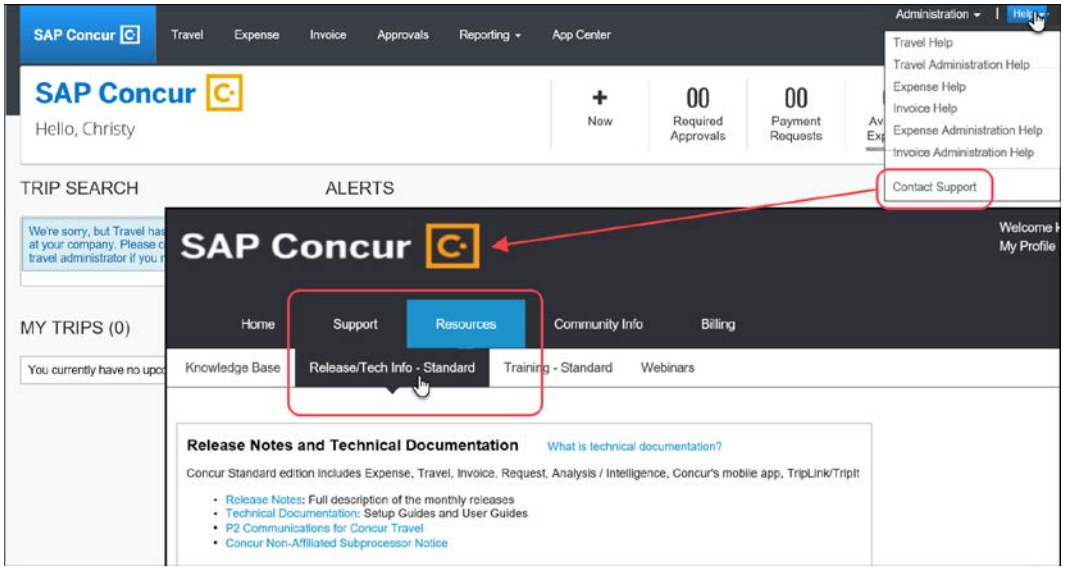
1. Click **Help > Contact Support**.
2. On the support page, click **Resources > Release/Tech Info**.



SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: November 17, 2018 Initial Post: Friday, November 16, 2:00 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Concur Invoice functionality for the standard edition.

Concur Invoice

New User Interface for Concur Invoice Available for Client Review and Opt-In

Overview

After a successful Early Access program of the new user interface, SAP Concur now offers an opt-in phase where all clients have the opportunity to familiarize themselves with the new user interface as SAP Concur prepares for general availability targeting the first quarter in 2019.

Through a new setting in Invoice Preferences, clients can enable the new user interface and review the new **Invoice Manager** page functionality that is targeted at the Accounts Payable (AP) user who is constantly monitoring the health of the Concur Invoice lifecycle within the system.

NOTE: Contact your SAP Concur representative for more information about the new user interface.

BUSINESS PURPOSE / CLIENT BENEFIT

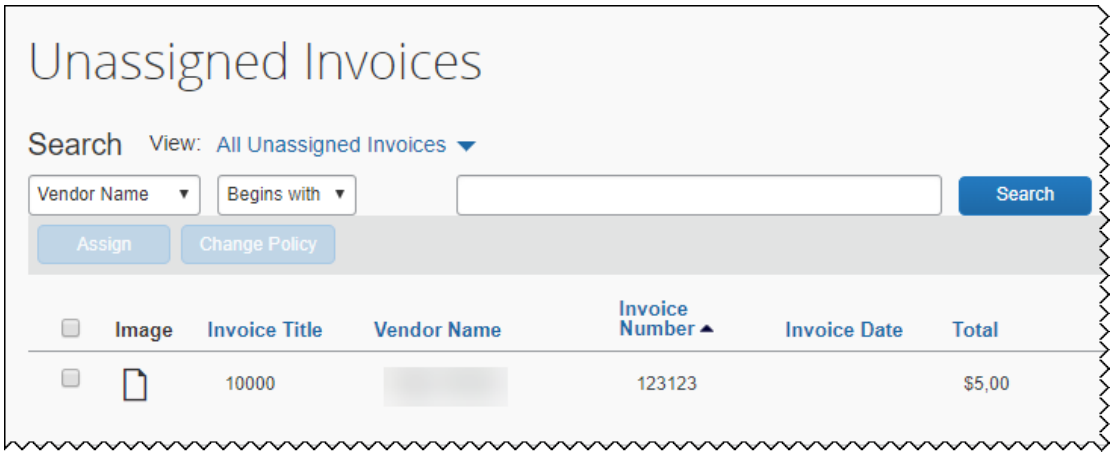
The new Concur Invoice user interface enables clients to work more efficiently and provides them greater visibility into their invoices in flight.

What the Invoice AP User and Invoice Processor See

When the new interface is enabled, the Invoice AP User and the Invoice Processor will land on a new **Invoice Manager** page that provides key information about all active invoices.

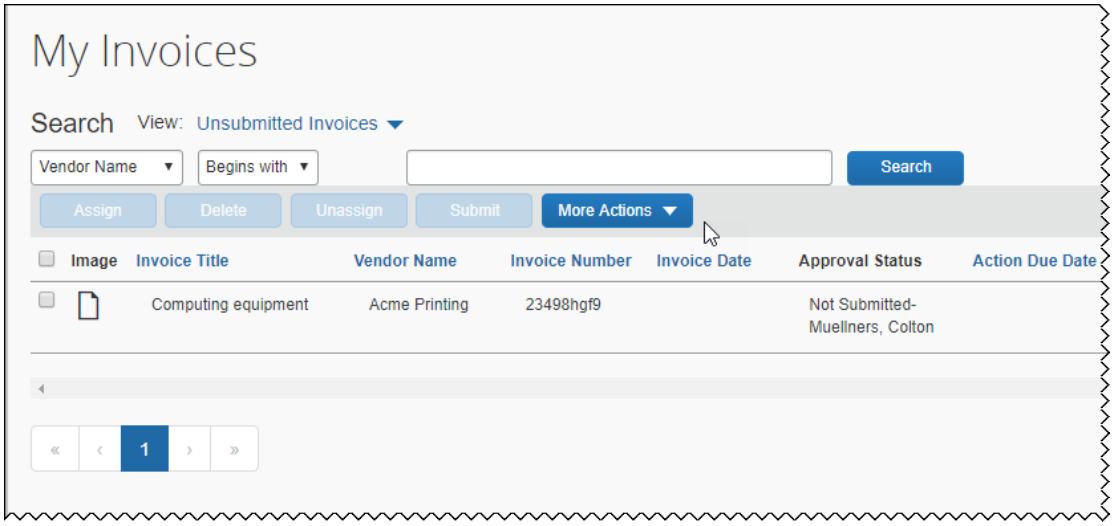
On the **Invoice Manager** tab, the Invoice AP User and Invoice Processor see new tiles and new sections including visibility into **Active Invoices** and **My Tasks** sections.

The Invoice Processor also sees a newly designed **Unassigned Invoices** page that is more modern.



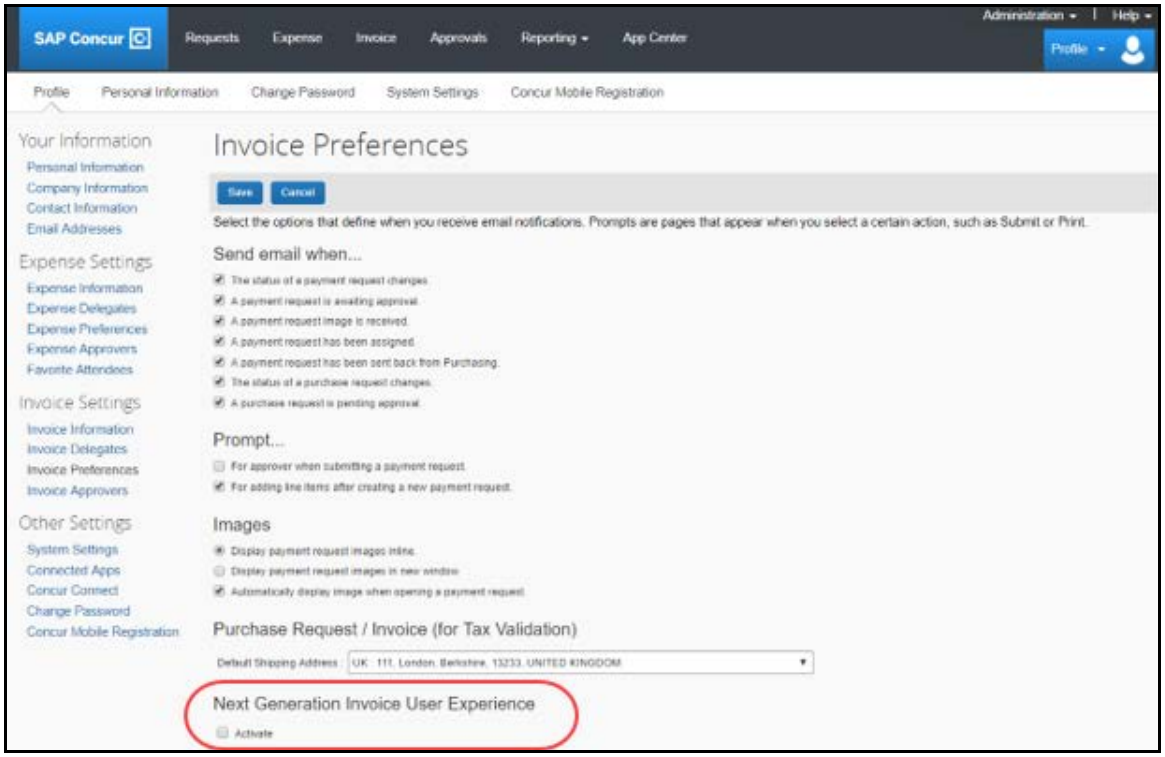
What the Invoice User Sees

Concur Invoice users who have access to **My Requests**, will see a newly designed **My Invoices** page that is more modern.



Configuration / Feature Activation

Clients will be able to activate this feature on the **Invoice Preferences** page by selecting (enabling) the **Activate** check box in the **Next Generation Invoice User Experience** section.



NOTE: More information about the new Concur Invoice user interface will be made available in future release notes.

Purchase Request

New v4 Purchase Request API

Overview

A new Purchase Request API is available from the SAP Concur Developer Center.

BUSINESS PURPOSE / CLIENT BENEFIT

The Purchase Request API enables developers to create and automatically submit purchase requests for preauthorization leveraging external data, and to retrieve purchase request numbers and statuses by using the POST and GET methods.

Configuration / Feature Activation

Information about the API is available on the SAP Concur Developer Center.

Purchase Order

New Purchase Order Extracts Feature With Two New Extracts

Overview

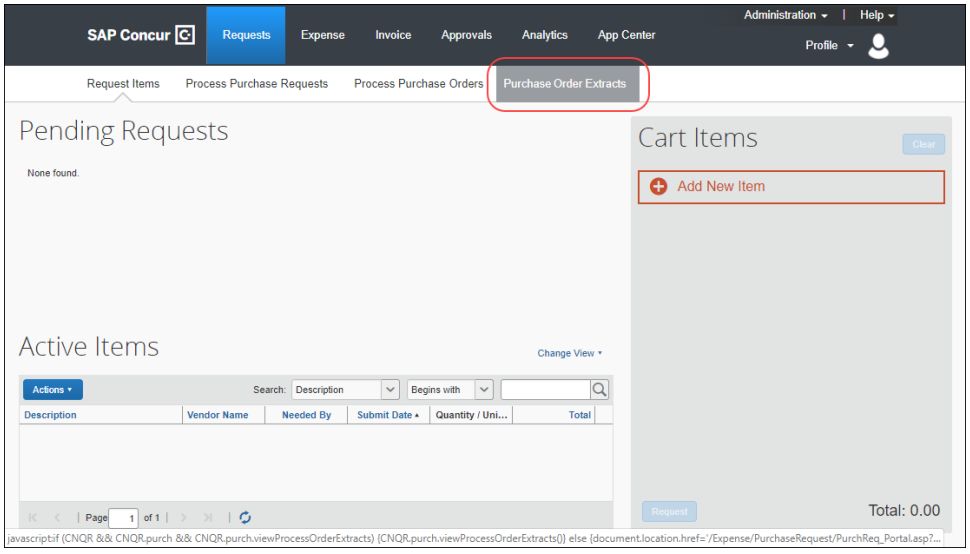
On systems with Purchase Request enabled, a new **Purchase Order Extracts** page is available to the Purchasing Admin. In addition, two new extracts, Purchase Order Extract and Purchase Order Receipt Extract, are available on the **Purchase Order Extracts** page.

BUSINESS PURPOSE / CLIENT BENEFIT

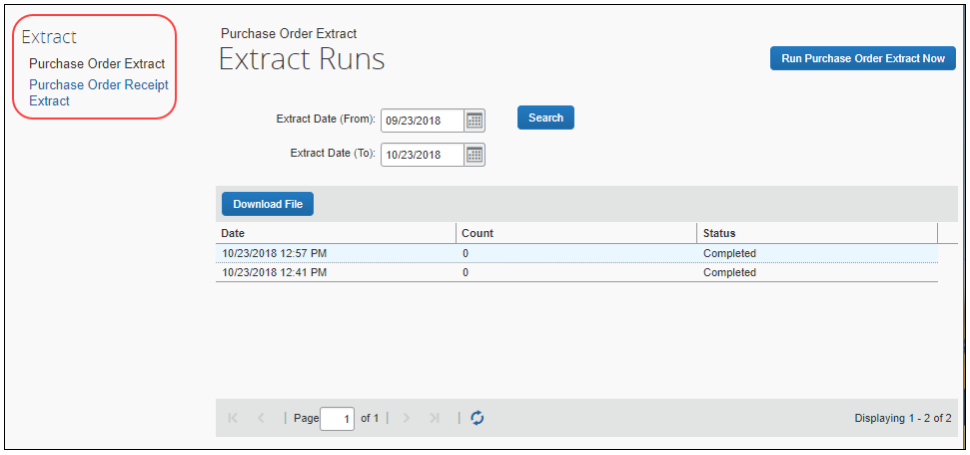
The new **Purchase Order Extracts** page enables the Purchasing Admin to run an on-demand job to extract purchase order or purchase order receipt data from the Concur Invoice system. After the data is extracted, clients can download the data and then import it into their system of record so that the inventory values reflect the quantities received.

What the Purchasing Admin Sees

On the **Requests** page, the Purchasing Admin sees a new **Purchase Order Extracts** tab.

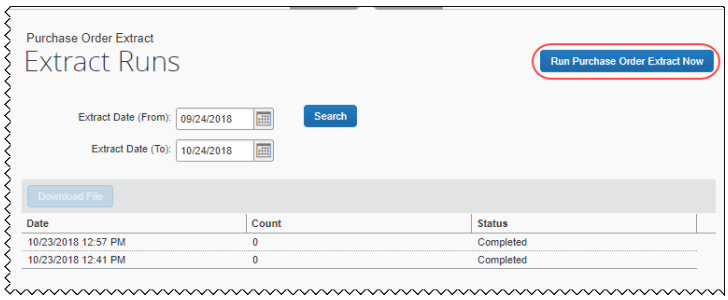


After clicking the tab, the **Purchase Order Extracts** page appears. On the **Purchase Order Extracts** page, in the **Extract** menu, the Purchasing Admin sees the **Purchase Order Extract** and **Purchase Order Receipt Extract** links.

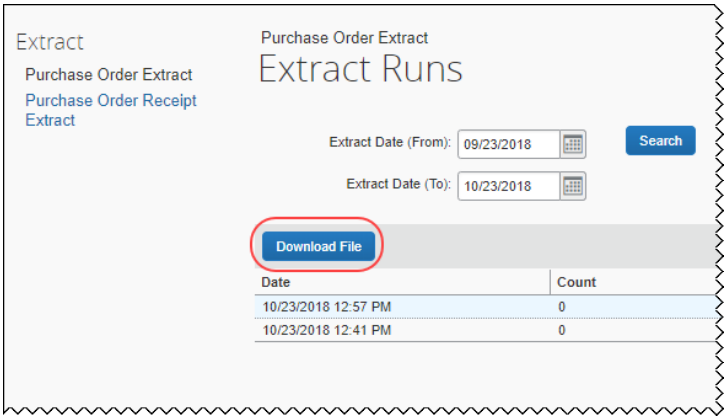


Depending on which extract link is selected, the Purchasing Admin sees either the **Run Purchase Order Extract Now** or the **Run Purchase Order Receipt Extract Now** button.

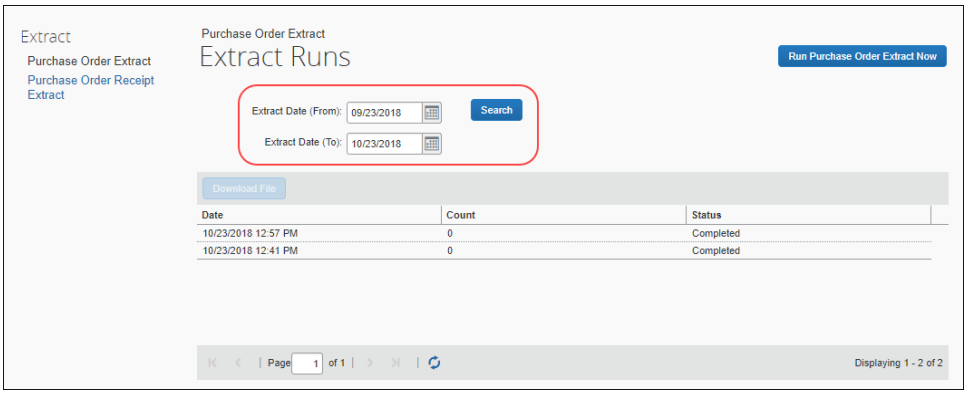
To start an extract, the Purchasing Admin selects the appropriate link in the **Extract** section, and then clicks the corresponding button.



Once the data has been extracted, it can be downloaded as a pipe-delimited text file by selecting the row for the extract the Purchasing Admin wants to download, and then clicking **Download File**. The file is downloaded to the default download location for the local machine.



The Purchasing Admin can search for previously generated extracts by setting a range of dates in the **Extract Date (From)** and **Extract Date (To)** fields, and then clicking **Search**.



Configuration / Feature Activation

The **Purchase Order Extracts** page, and the new Purchase Order Extract and Purchase Order Receipt Extract are automatically available on systems where Purchase Request is enabled.

Accounting

New Options in Accounting Software

Overview

The following new options are available in the **Select your accounting software** list on the **Accounting** page in Product Settings.

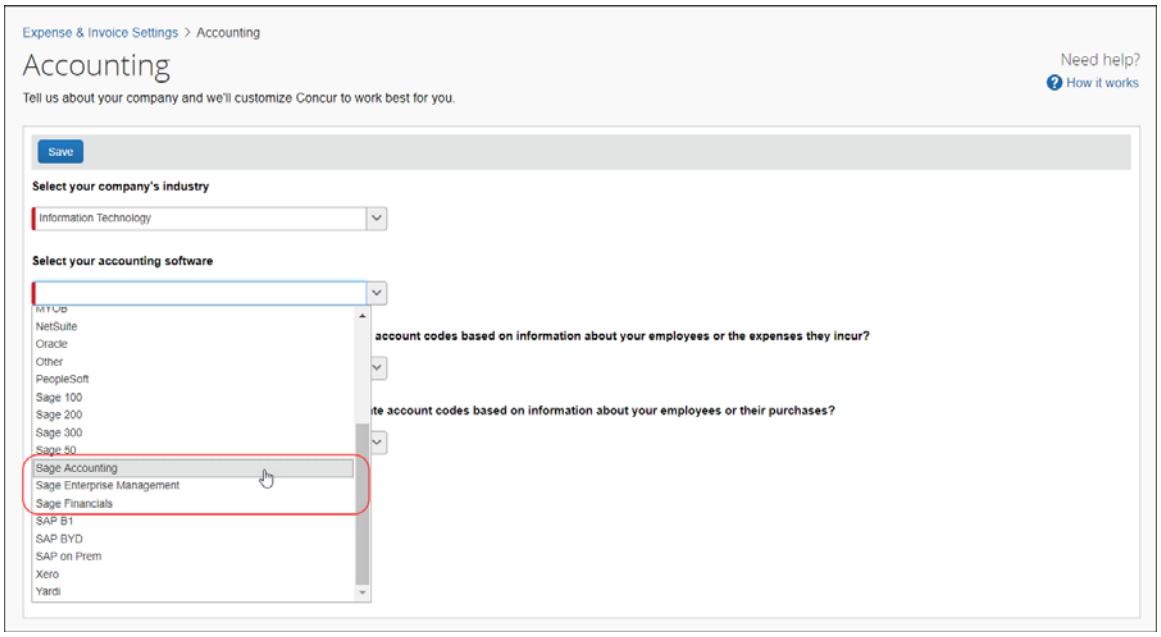
- Sage Accounting
- Sage Enterprise Management
- Sage Financials

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement helps maintain current accounting software listings by reflecting popular, current accounting software options.

What the Admin Sees

On the **Accounting** page, the client admin now sees new accounting software in the **Select your accounting software** list.



Configuration / Feature Activation

This enhancement is automatically available; there are no additional configuration or activation steps.

SAP Concur Email

Ongoing Email Infrastructure Change - Add IP Addresses to Safe Senders List

Overview

SAP Concur is transitioning to a new email infrastructure for outbound email from our products to SAP Concur users. Because of this, companies that filter inbound email based on the sending IP address must add the new IP addresses to their safe senders list to ensure that their users receive email from SAP Concur.

Concur Expense Only

Be aware that – at this time – the issue described here affects only companies that use Concur Expense ***and*** filter incoming email based on IP addresses. (This includes all editions of Expense – whether the company uses Expense by itself or integrated with any other SAP Concur product or service.) Other SAP Concur services (such as Travel and Concur Pay) are not currently affected.

We are currently targeting the first quarter of 2019 to make additional changes. Be aware that all affected companies will be notified well ahead of time and will be provided all possible options for managing this issue.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If you use Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure any required safe senders list for IP addresses are updated so that your users continue to receive SAP Concur email without interruptions.

Ongoing Updated Email Format

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, more consistent look-and-feel across all SAP Concur services.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent is to provide a consistent, updated look for users.

IMPORTANT

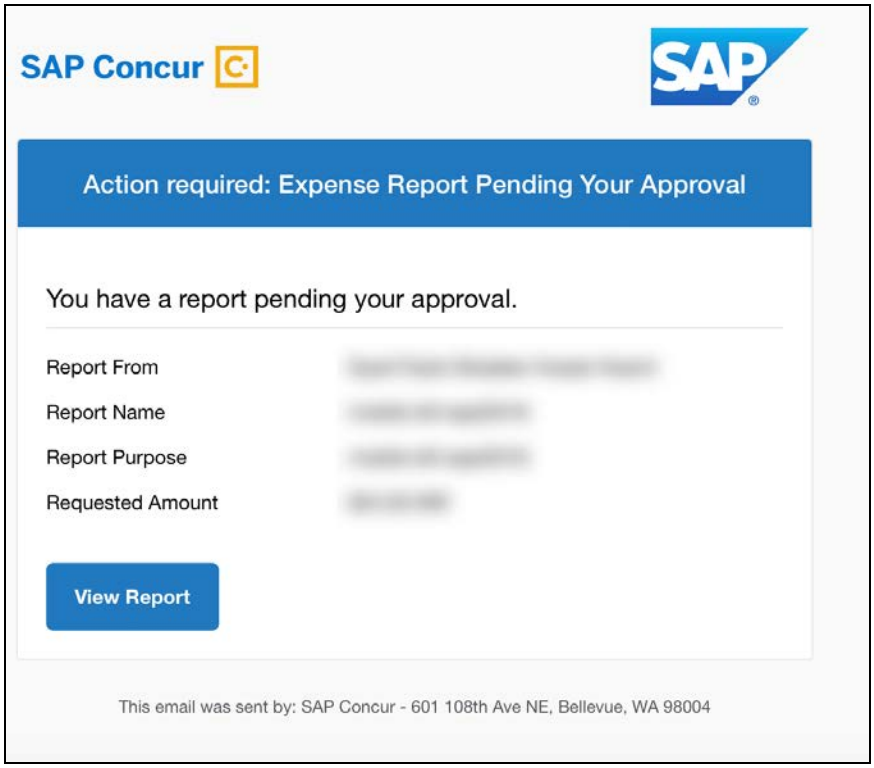
Note the following:

- The email content has not changed – just the look and feel.
- The changes will appear over time. Each product team (Expense, Invoice, Travel, etc.) decides when to use the new format. Timing will be based on resource availability and the priority of other scheduled enhancements.
- Do not expect all product emails to change at the same time. For example, perhaps Expense approval email will be first, and then other Expense notifications will follow.
- There is no assigned end date for the project. The changes might take longer than a year.
- Each team will provide release notes when their new emails are scheduled to appear.

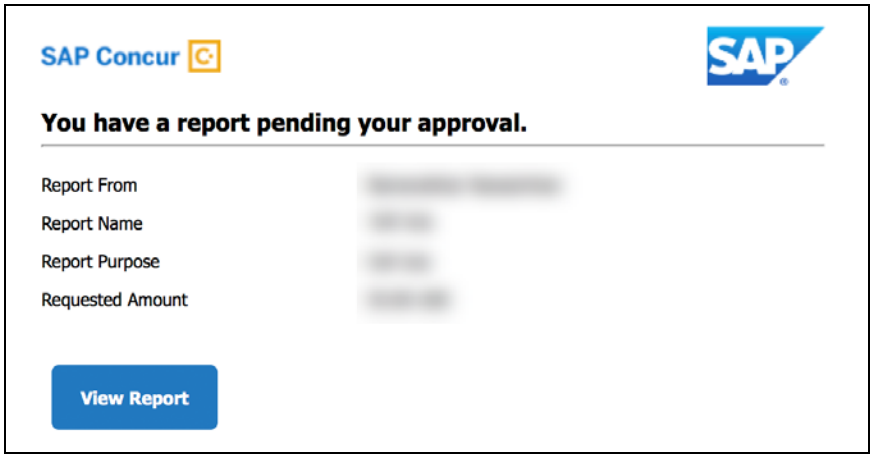
What the User Sees

The Expense approval email is shown below. Over time, all emails generated from SAP Concur will have a similar look.

New Format



Current Format



Configuration / Feature Activation

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

QuickBooks

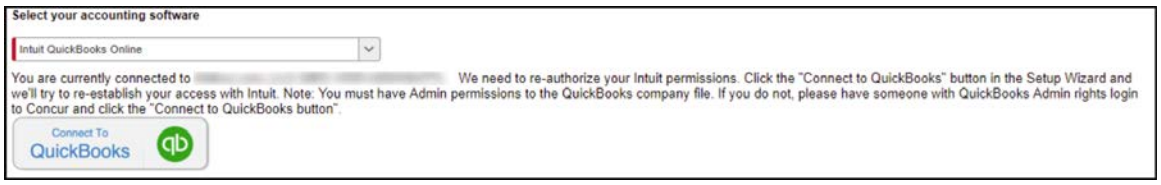
Update QuickBooks Online Integration Authorization

Overview

SAP Concur has updated the authorization process for the QuickBooks Online integration to allow clients to re-enter their QuickBooks Online credentials if they have received a re-authorization prompt.

What the Admin Sees

The Admin sees the following message.



BUSINESS PURPOSE / CLIENT BENEFIT

This feature allows the administrator to re-enter their QuickBooks Online credentials without disconnecting from and reconnecting to SAP Concur.

Configuration / Feature Activation

This change is automatically available; no additional configuration or feature activation is required.

Planned Changes

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

Concur Invoice

Planned Changes New Import Functionality Available for Electronic Invoices

Overview

In a future release, SAP Concur will enable Concur Invoice Standard clients to import electronic invoices (e-invoices) into Concur Invoice through the Payment Request Import functionality. When this functionality becomes available, clients will be able to import their e-invoices into Concur Invoice by supplying SAP Concur with a file containing e-invoice data that conforms to the specifications described in the *Payment Request Import V2 (Current) Specification*.

BUSINESS PURPOSE / CLIENT BENEFIT

This functionality will make it easier for clients to import invoice data into Concur Invoice.

Configuration / Feature Activation

When the functionality becomes available, clients who want to import e-invoices into Concur Invoice through the Payment Request Import functionality will need to contact their SAP Concur representative to enable it.

Planned Changes Payment Request(s) Renamed to Invoice(s)

Overview

In a future release, SAP Concur will replace instances of the term "payment request" and its iterations with the term "invoice" and its iterations. These changes will be made in the user interface, the Concur Invoice documentation, and in all other SAP Concur product documentation where it appears.

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps to ensure that the terminology used in SAP Concur is consistent with industry standard terminology.

Configuration / Feature Activation

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

NOTE: The terminology change will occur when the new user interface for Concur Invoice becomes generally available.

📖 For more information about the new user interface for Concur Invoice, refer to the *New User Interface for Concur Invoice Available for Client Review and Opt-In* release note in this document.

Purchase Order

Planned Changes Import Now for PO and PO Receipt Imports

Overview

The Import Now feature enables clients to import PO and PO receipt files into Concur Invoice immediately without having to wait for an overnight scheduled import. This is beneficial for clients who need to import POs and PO receipts and work with them in the Concur Invoice product the same day they are created externally. This also allows clients to do multiple PO and PO receipt imports a day for more synchronized and up-to-date data.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature gives clients control over when and how frequently to import POs and PO receipts into Concur Invoice.

Configuration / Feature Activation

This enhancement is automatically available. To start using this feature, clients need to add the suffix "importnow" on their PO and PO receipt files that are transferred to their FTP site.

Current Import Naming Convention

The current naming conventions are as follows:

- PO import: poinvoice_EntityID_Date
- PO Receipt Import: purch_receipt_EntityID_Date

These naming conventions will remain as is today and the files will continue to be picked up and run on the existing schedule. Clients who wish to always import these records using the import now option should adjust their schedules accordingly and

remove any scheduled jobs from the purchase order and purchase order receipt import job definitions.

Import Now Naming Convention

The Import Now naming conventions are as follows:

- PO Import: poinvoiceimportnow_EntityID_Date
- PO Receipt Import: purch_receiptimportnow_EntityID_Date

For the Import Now option, the PO receipt file is usually dependent on the PO file, so clients must coordinate their file transfer to the FTP site so that the PO file is always transferred first before the PO receipt file to ensure the PO's are imported before the receipts. The PO receipt Import Now function will not start until any active PO import running is completed. However, once the PO files are sent with the "importnow" suffix, they will be imported immediately when they are transferred to the FTP site.

NOTE: Clients must have an FTP site to use this feature.

Vendor Management

Planned Change Audit Trail for Vendor Changes

Overview

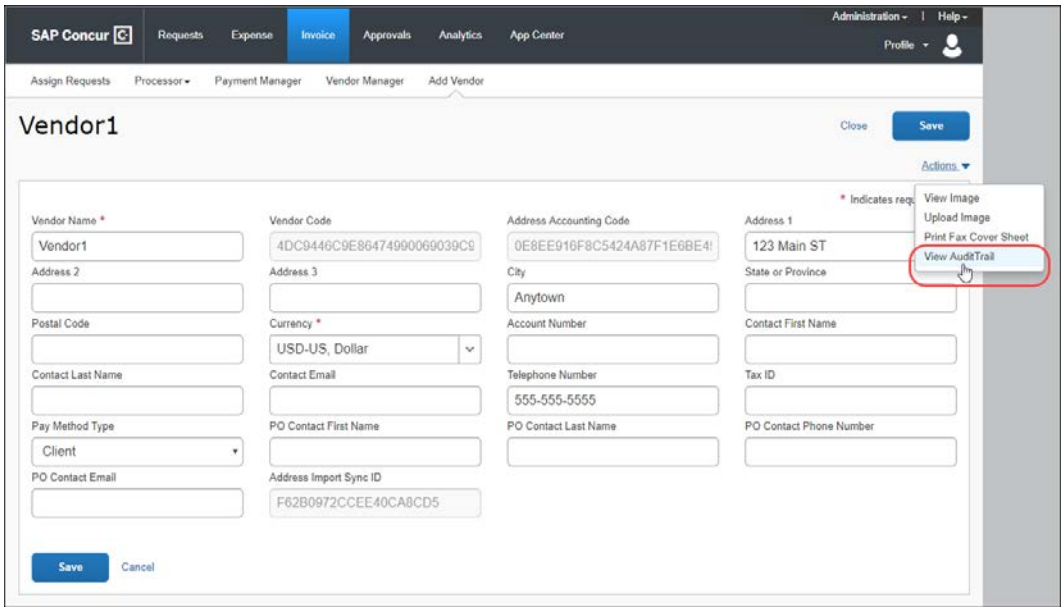
In a future release, clients with the Create and Approve Vendors feature enabled will be able to track changes to a vendor through the **Audit Trail** page within the vendor record in Vendor Manager. For example, when a vendor is approved or updated by the Vendor Manager, those actions will appear on the **Audit Trail** page.

BUSINESS PURPOSE / CLIENT BENEFIT

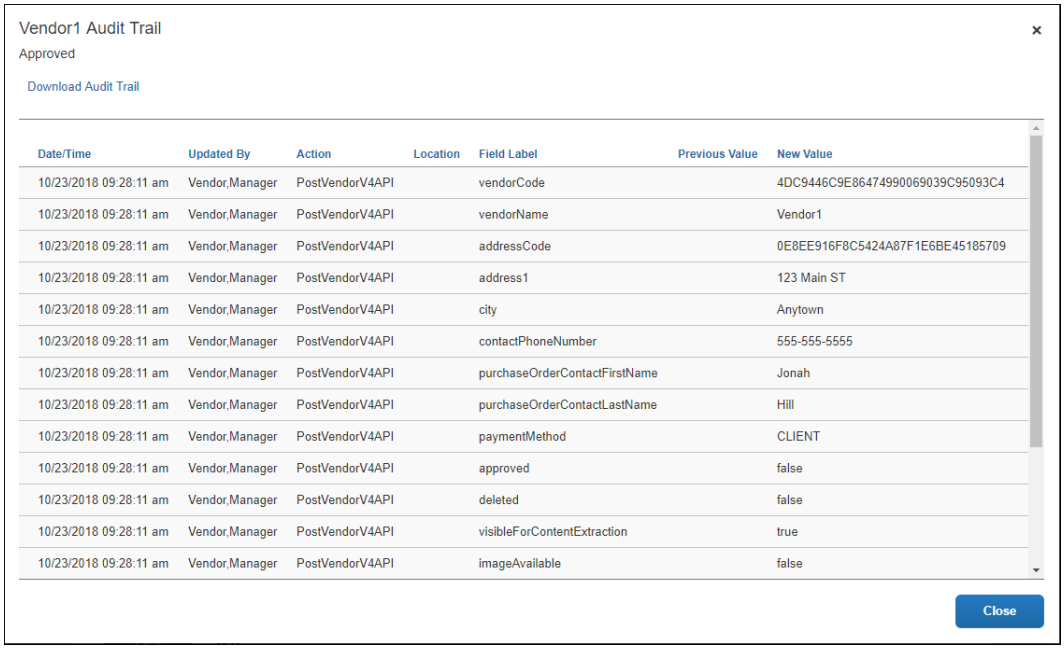
This change will enable users with the Invoice Vendor Manager role to track changes made to vendor information in Vendor Manager.

What the Invoice Vendor Manager Sees

Within an open vendor record, in the **Actions** menu, the vendor manager will see a new option, **View Audit Trail**.



After clicking the **View Audit Trail** option, the audit trail page for the vendor will appear.



Vendor1 Audit Trail

Approved

Download Audit Trail

Date/Time	Updated By	Action	Location	Field Label	Previous Value	New Value
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		vendorCode		4DC9446C9E86474990069039C95093C4
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		vendorName		Vendor1
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		addressCode		0E8EE916F8C5424A87F1E6BE45185709
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		address1		123 Main ST
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		city		Anytown
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		contactPhoneNumber		555-555-5555
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		purchaseOrderContactFirstName		Jonah
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		purchaseOrderContactLastName		Hill
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		paymentMethod		CLIENT
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		approved		false
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		deleted		false
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		visibleForContentExtraction		true
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		imageAvailable		false

Close

Configuration / Feature Activation

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

Planned Changes Field Added to Default Vendor Information Form

Overview

In a future release, the default form for adding and updating vendor information will include the **Country** field.

The **Country** field contains the country associated with the vendor address.

BUSINESS PURPOSE / CLIENT BENEFIT

This field enables clients to include additional information about requested and approved vendors.

Configuration / Feature Activation

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

Planned Changes Descriptions Tab Added to Vendor Import and Vendor Banking Import Templates

Overview

In a future release, the downloadable Vendor Import and Vendor Banking Import templates will include a new tab that provides details about the columns in the template.

NOTE: The Vendor Banking Import template is available to entities with Invoice Pay enabled.

BUSINESS PURPOSE / CLIENT BENEFIT

The additional details help the client to ensure that the information in the vendor import template meets the requirements of the fields into which the information will be imported.

Configuration / Feature Activation

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

Planned Changes Vendor Import Messages Improved

Overview

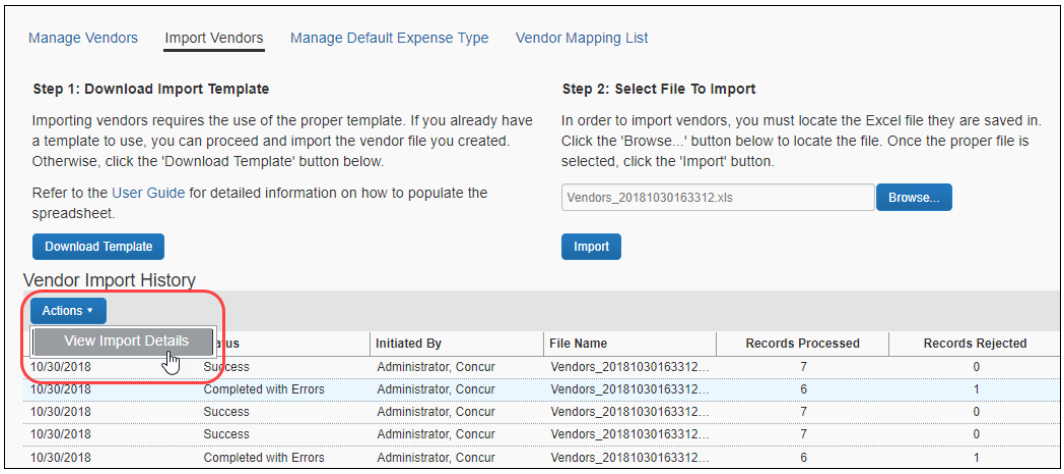
In a future release, some of the messages that are displayed in Vendor Manager when clients import vendors using the vendor import template will be improved.

BUSINESS PURPOSE / CLIENT BENEFIT

The improved messages will more clearly describe issues that were encountered during the import process so that the Vendor Manager can more easily identify and address these import issues.

What the Vendor Manager Sees

The Vendor Manager sees the improved messages when they view the **Import Details** page for a selected import by selecting the import from the **View Import History** list, and then choosing **View Import Details** from the **Actions** menu.



Configuration / Feature Activation

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

Planned Changes Create and Approve Vendors Available in Test Environments

Overview

In a future release, the Create and Approve Vendors Feature will be available in test environments.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables developers and implementation teams to work with the Create and Approve Vendors feature prior to moving to a production environment.

Configuration / Feature Activation

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

Budget

Planned Changes Workflows for Budget

Overview

In a future release, workflows will be available for Budget. Workflows define how the system routes invoices, expense reports, and requests through approval and processing steps. SAP Concur's flexible workflow feature for Budget allows companies to design workflows specifically tailored to their unique needs.

Without budget review, budgets may become fully consumed well before the end of a period or year leaving an organization with limited options and budget owners with, for example, exceeded budgets. In addition, early spending means spending that is more important to the organization will be declined because less important spending consumed the budget early on.

Combining budget review in the workflow adds value. Audit rules and workflow step rules can help organizations to add in controls when it makes sense to fine tune to an organization's specific needs.

Equally important is the determination when a spending item is regarded as committed toward a budget. In most organizations, the commit is when a spending item is paid; it went through most if not all approval steps. In other organizations, the commit occurs much earlier. As soon as a purchase request or an authorization request is approved it is regarded as "promised".

BUSINESS PURPOSE / CLIENT BENEFIT

This feature will provide clients with control over the budget spend to, for example, avoid exceeded budgets too early in a budget period or budget year.

Configuration / Feature Activation

The administrator must configure this feature on the **Approval Routing** page.

To access the Approval Routing page:

1. Click **Administration** > **Invoice Settings** or **Expense Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice* or *Expense* depending on the product you are working with.
3. In the **Policy** section, click **Show Advanced Settings**.
4. Click **Invoice Approvals**, **Expense Approvals**, or **Purchase Request Approvals**.

Product Settings

Planned Changes Cost Tracking to Have New Look, New Name – Targeted for End of November

Overview

The **Cost Tracking** page in Product Settings will soon have a new look and flow, and a new name. All existing functionality will remain with improved usability for field setup and management.

This feature is targeted to release on November 27, 2018.

The enhancements will include the following:

- The **Cost Tracking** page will be renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page will allow client admins to manage custom fields starting from one page. **Linked Lists** will be renamed to **Multi-Level Lists**.
- A new **Add New Field** page will be accessible from the **Manage Custom Fields** page. The **Add New Field** page will allow client admins to create fields by selecting the field's type and then selecting field options. Client admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.
- Admins can create up to 12 custom fields, which can be created by typing in a custom field name or choosing from a list of suggestions. Previously, a maximum of 12 custom fields were allowed, but only six could be fields created by typing in a custom field name. The remaining six had to be chosen from the provided list.

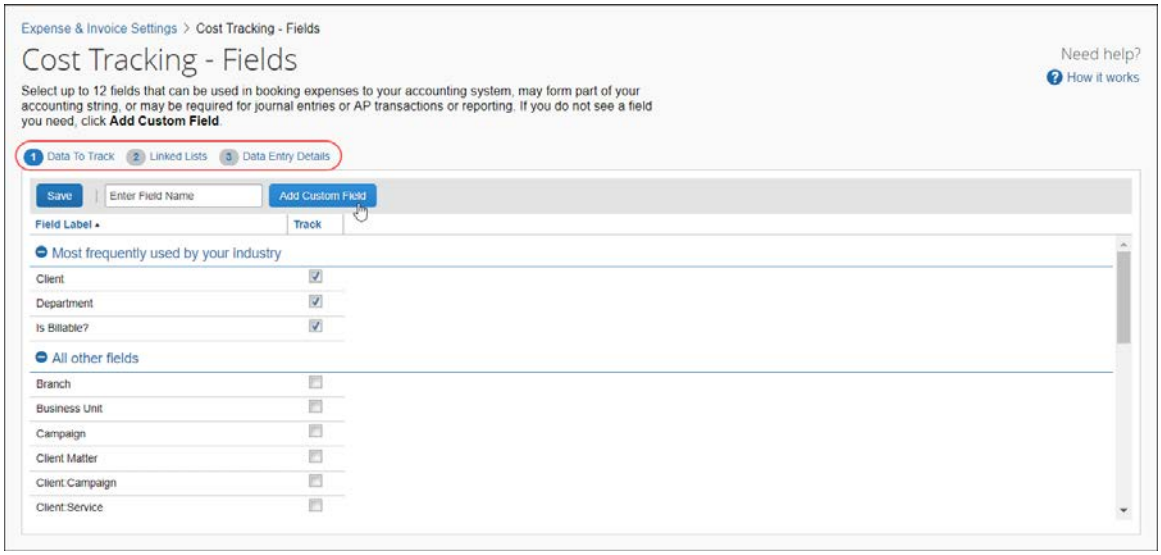
BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end-user experience.

What the Admin Sees

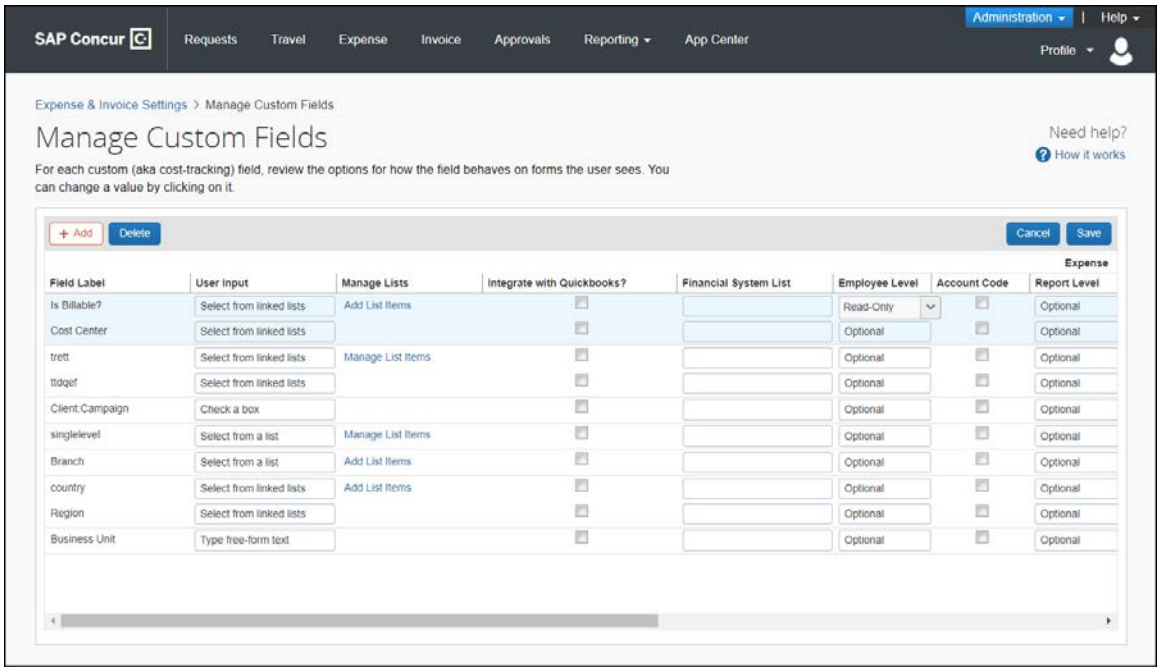
The existing **Cost Tracking – Fields** page includes three field management tabs: **Data To Track**, **Linked Lists**, and **Data Entry Details**.

Before



After the new look and feel has been implemented, the existing **Data Entry Details** page, will be renamed to **Manage Custom Fields** and there will be new buttons to add and delete custom fields, replacing functionality previously located on the **Select Fields** page.

After

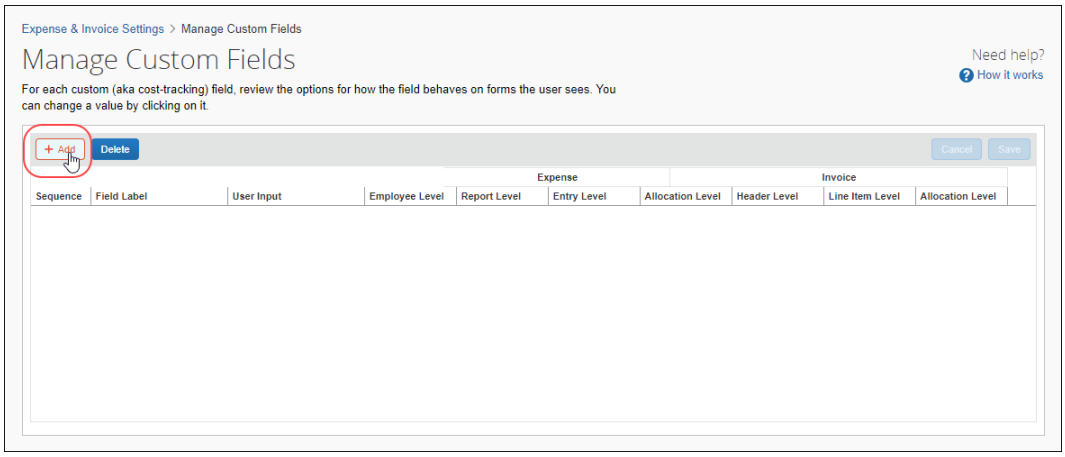


ADD NEW FIELDS

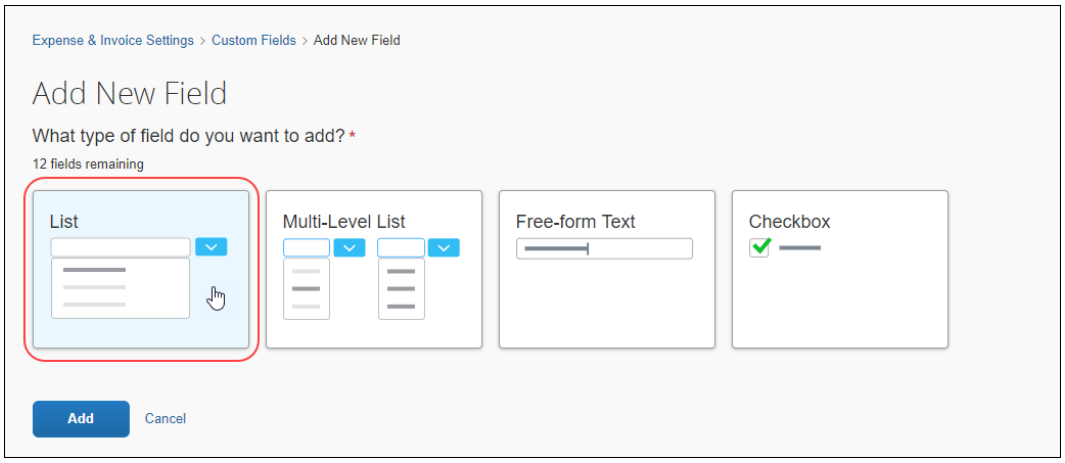
On the **Add New Field** page, client admins will be able to create the following field types: list field, multi-level list (composed of two or more levels), free-form text, and check box. Admins will be able to create up to 12 custom fields by typing in a custom field name or choosing from a list of suggested field names.

To add a new field:

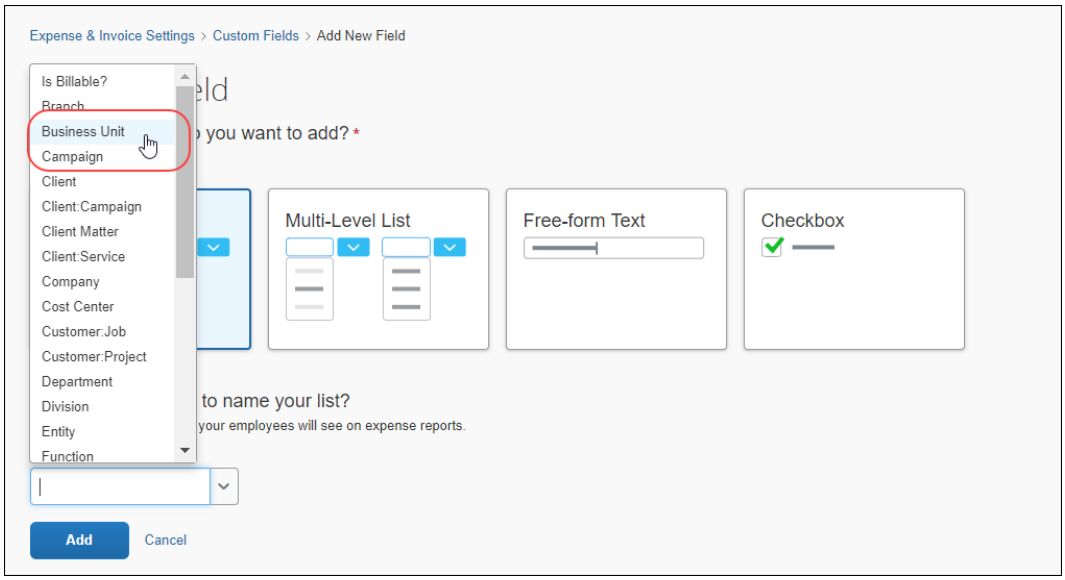
1. On the **Manage Custom Fields** page, click **Add** to open the **Add New Field** page.



2. Click on the type of field you want to add.

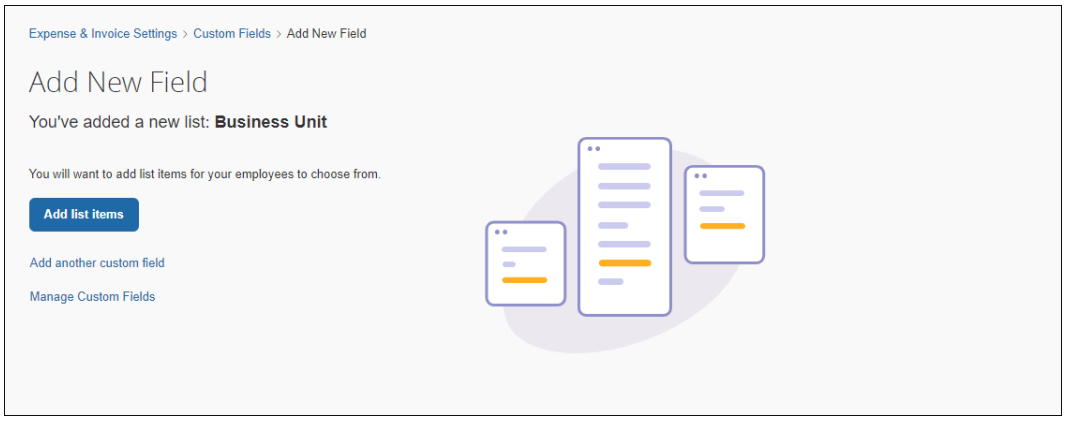


3. In the **What would you like to name your list?** section, in the **Field Name** list, select a name or type in a custom field name. This name will appear as a label when the field is displayed.



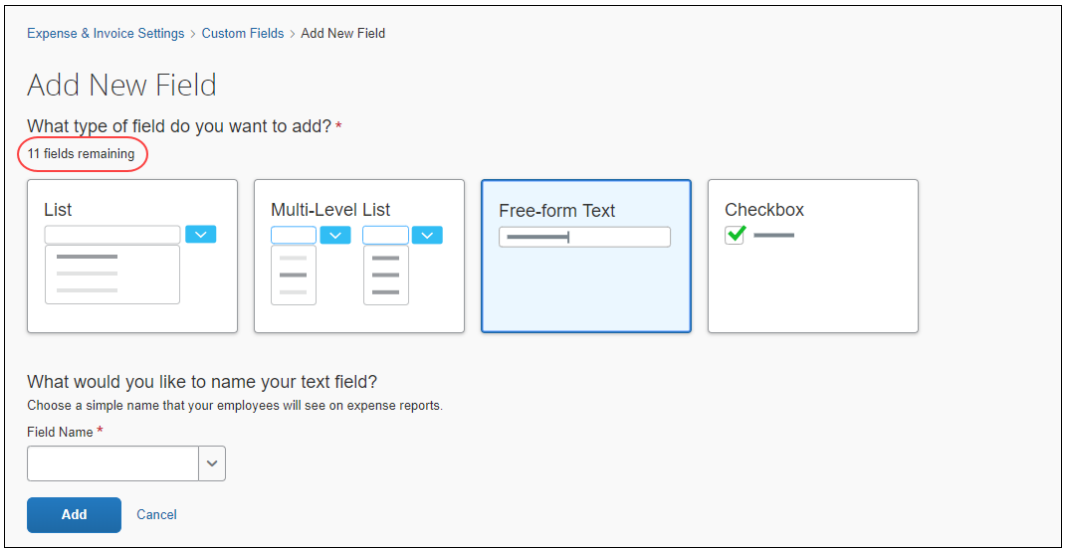
4. Click **Add**.

   A message confirms the addition of the new field.



After you add a field, you can add list items, add another custom field, or return to the **Manage Custom Fields** page.

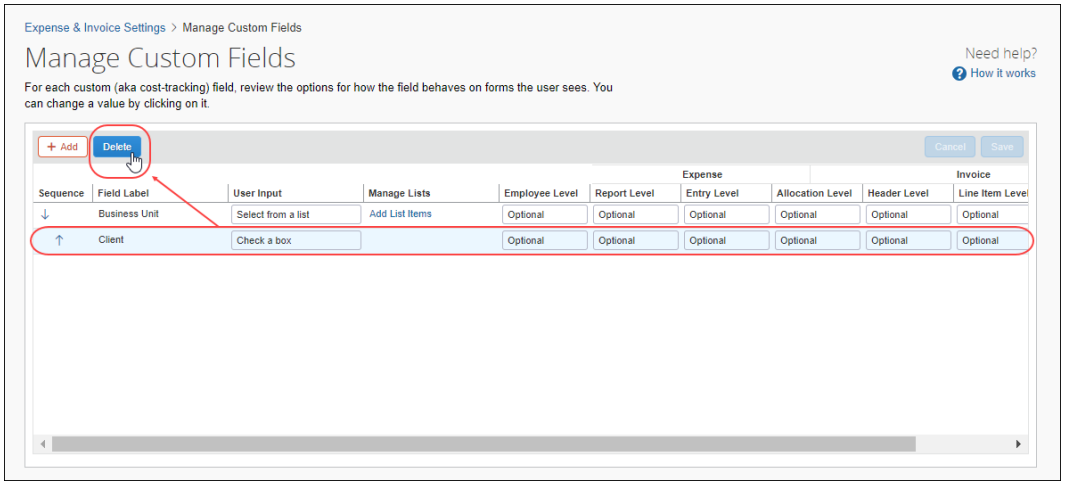
If you choose to add another new field, an on-screen message appears noting how many available custom fields you have remaining.



DELETE FIELDS

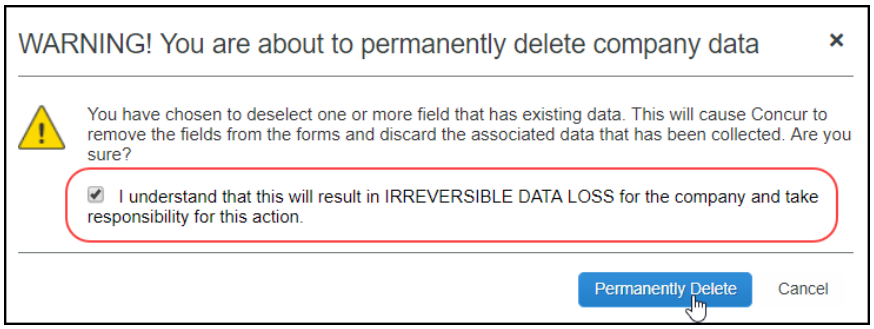
To delete a field:

1. On the **Manage Custom Fields** page, select the field you want to remove.



2. Click **Delete**.

3. In the message box, select the check box to agree to the terms of removing the fields.



4. Click **Permanently Delete** to remove the field.

Configuration / Feature Activation

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

For more information, refer to the *Shared: Cost Tracking Setup Guide for Concur Standard*.

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SSO is currently supported for Concur Expense, Invoice, Request, and Travel. SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur which provides SAP Concur clients with a self-service option for setting up SSO for their organization.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Access To Concur** section of Product Settings.

- Single Sign-On can be managed for Standard Travel if it is bundled with Expense, Invoice, and/or Request.
- For standalone Standard Travel, the Manage Single Sign-On feature will be accessible from the **Travel Settings** page.

Other SAP Concur products and services are outside the scope of this initial release.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides SAP Concur clients with a self-service option for setting up SSO.

Configuration / Feature Activation

Configuration information will be provided in a future release note.

SAP Concur

Planned Changes New SAP Concur Sign In Page

Overview

SAP Concur is planning to add a new **Sign In** page, providing an updated login experience for users who log in with user name and password credentials. Current Single Sign-On (SSO) users will log in without having to enter additional credentials. This feature is planned for 2019.

The new **Sign In** page feature includes the following:

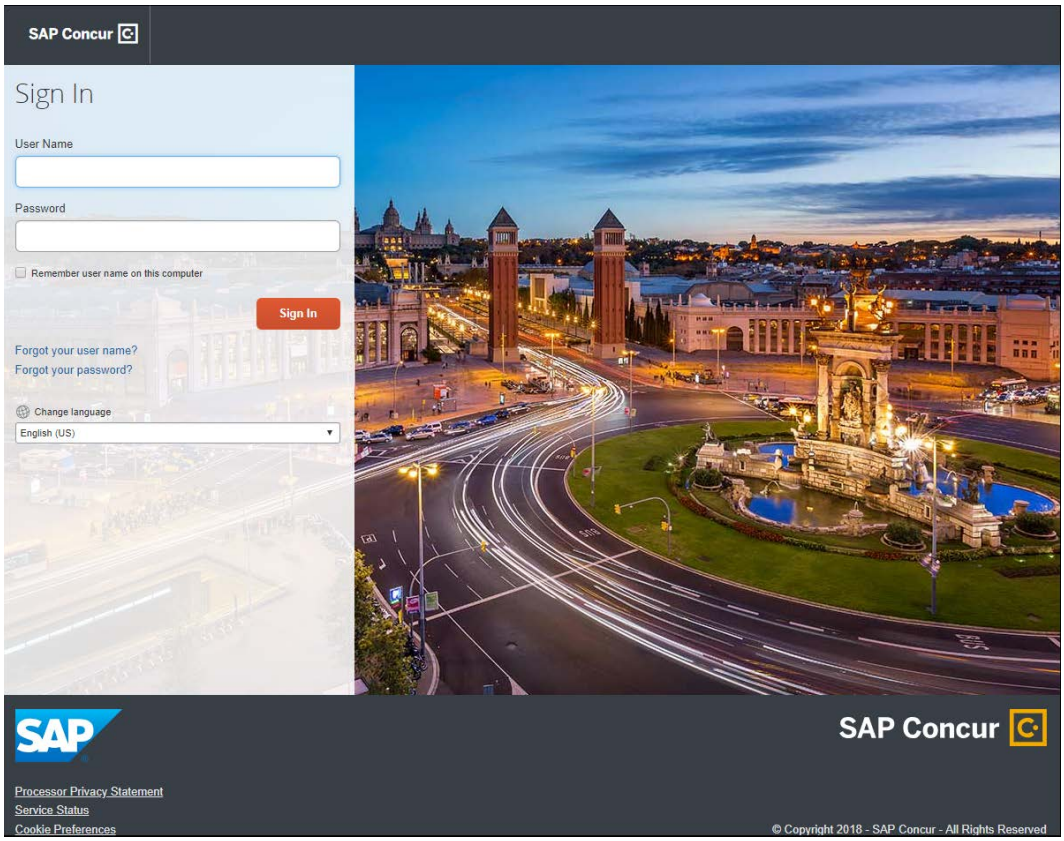
- **Two-step login**: provides enhanced security, meets current industry standards, and provides a better log in success rate
- **Multi-account login**: allows administrators to log in with multiple accounts
- **Password hint removal**: provides better security for users and SAP Concur
- **User avatar**: enhances the user experience (planned for a future release)

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security and a faster, more convenient experience for users logging in to SAP Concur products and services.

What the User Sees – Current Sign In Page

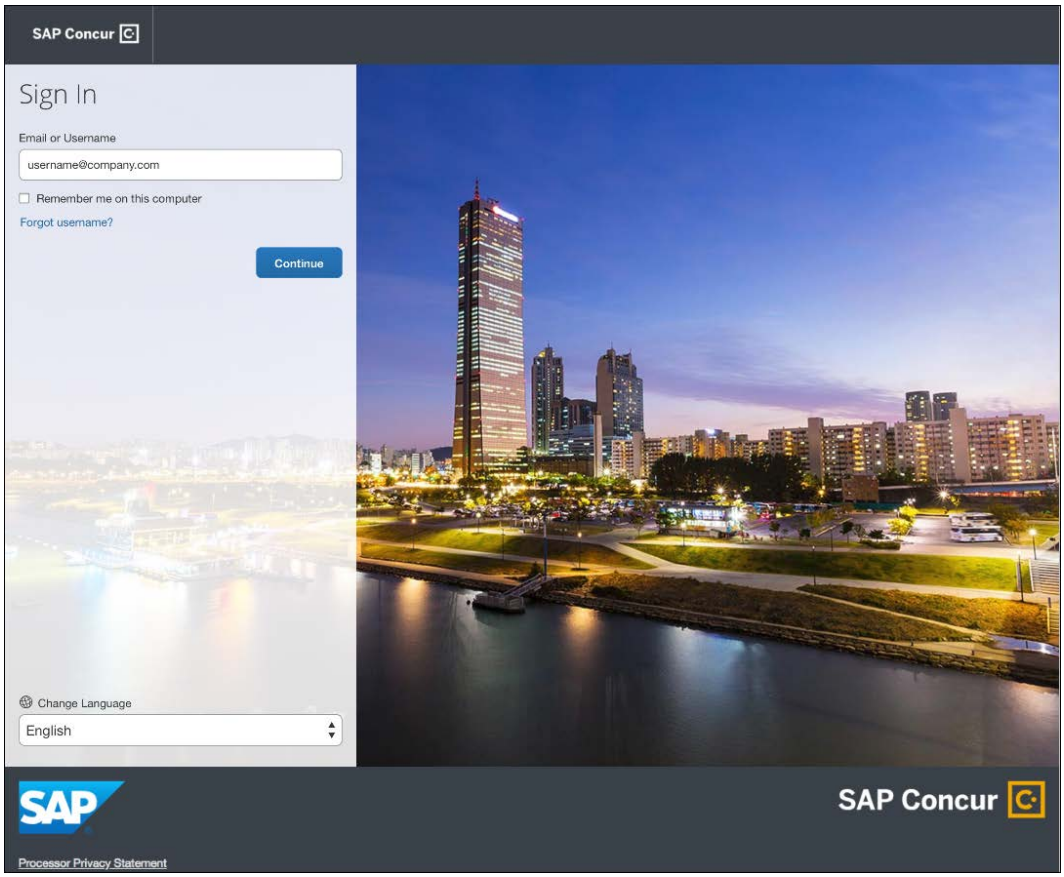
The SAP Concur **Sign In** page currently appears with **User Name** and **Password** fields, and a **Sign In** button. Once a user is authenticated, the SAP Concur **Home** page appears.



What the User Sees – New Sign In Page

The new SAP Concur **Sign In** page will have an **Email or Username** field and a **Continue** button. The user will type in their email or username. The user can select the **Remember me on this computer** check box, so their email or username is stored and will not have to be reentered the next time they log in to SAP Concur.

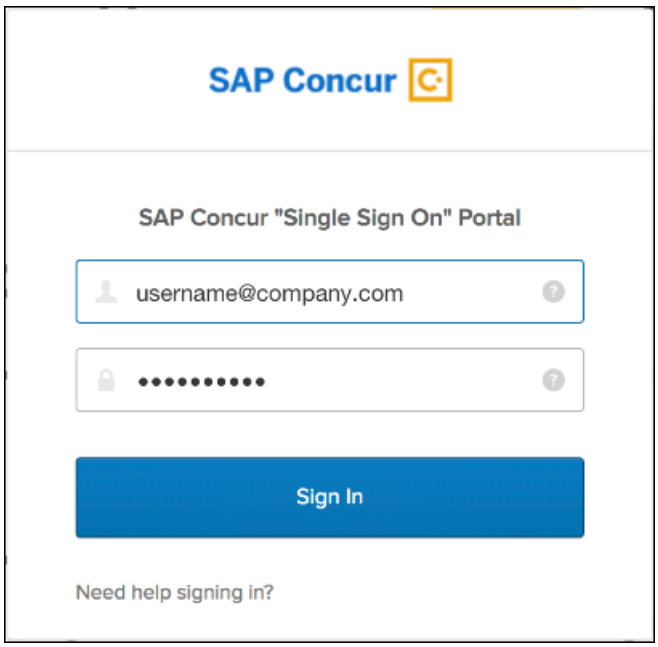
After entering their email or username, the user will then click **Continue**.



Depending on the client's implementation of SAP Concur, users will then be directed to the designated Identity Provider (IdP) Single Sign-On portal or an additional **Sign In** page.

SSO Users

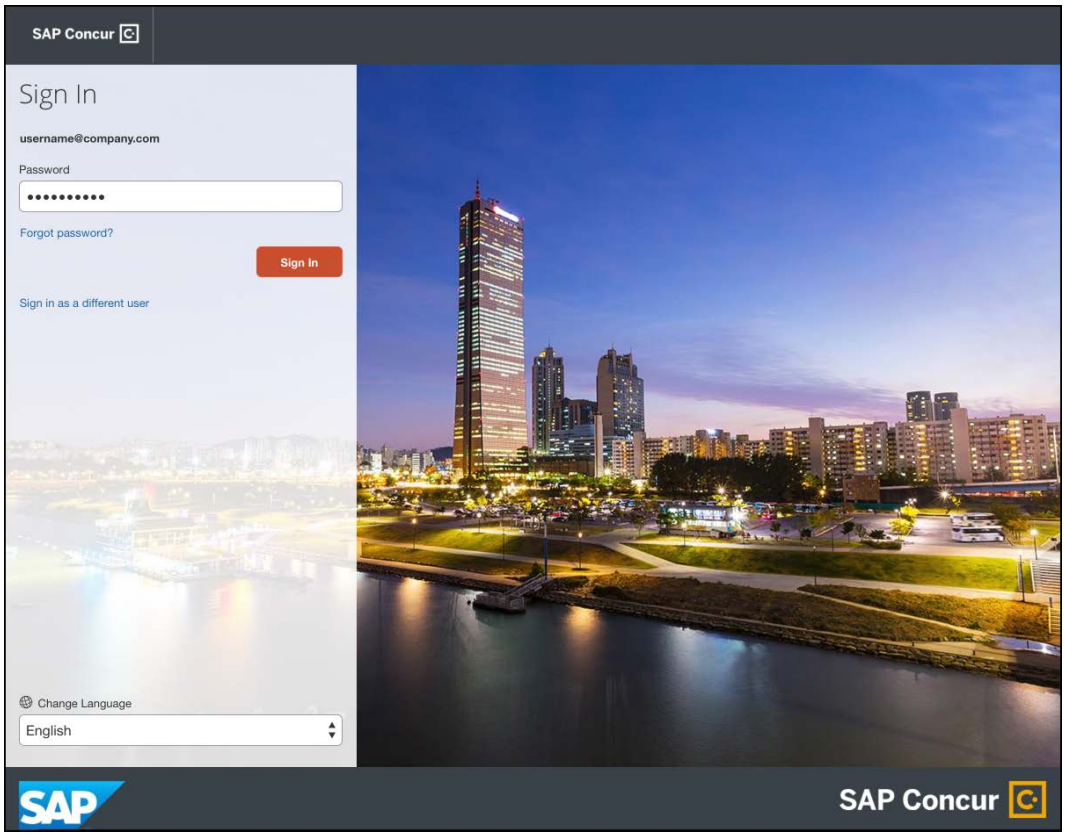
When the designated Identity Provider (IdP) Single Sign-On portal appears (similar to the one shown below), the user will enter their email or username, and their password, and then click **Sign In**. After being authenticated, the user will be directed to the SAP Concur **Home** page.



After being authenticated, the user will be directed to the SAP Concur **Home** page.

USERS WITH USERNAMES AND PASSWORDS

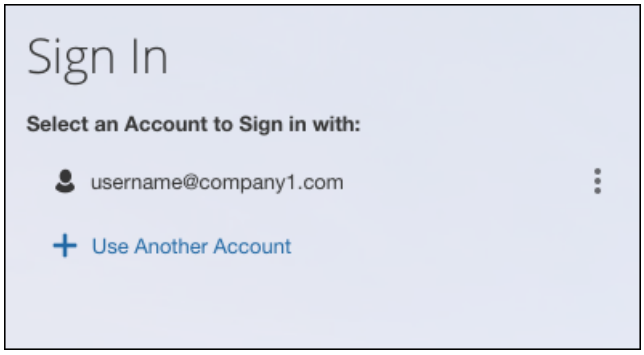
The user will be directed to an additional **Sign In** page. The user will enter a password and click **Sign In**. The system will then authenticate the user's credentials.



Once the user's password is verified, the SAP Concur **Home** page appears.

RETURN USERS

If a returning user selected the **Remember me on this computer** check box during their initial login session, they will see their email or user name displayed on the **Sign In** page. Users who did not select the **Remember me on this computer** check box will log in as they did initially.



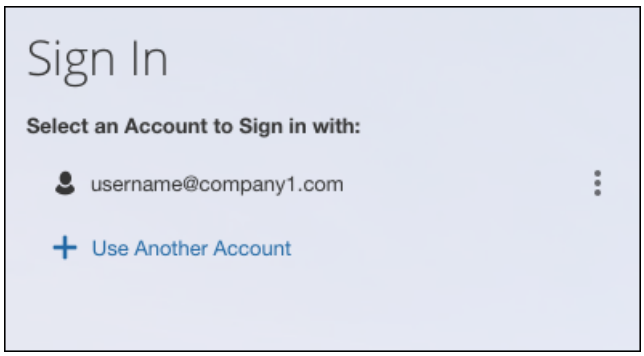
The user will click on their username, and then and then one of the following occurs:

- **SSO Users**: The user will be directed to the SAP Concur **Home** page.
- **Users with Usernames and Passwords**: On the **Sign In** page, the user will enter a password and then click **Sign In**. The user will then be directed to the SAP Concur **Home** page.

USERS WITH MULTIPLE ACCOUNTS

SAP Concur users with multiple login accounts have more than one login option depending on the user role or account they want to use. The user will first log in to SAP Concur using one of their accounts. Once successfully logged in, the user logs out of the system.

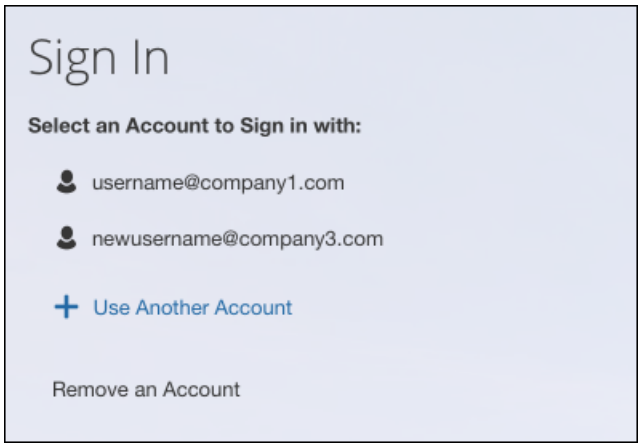
To add another account, on the **Sign In** page, the user clicks the **Use Another Account** link.



The next login step depends on the account type the user wishes to use:

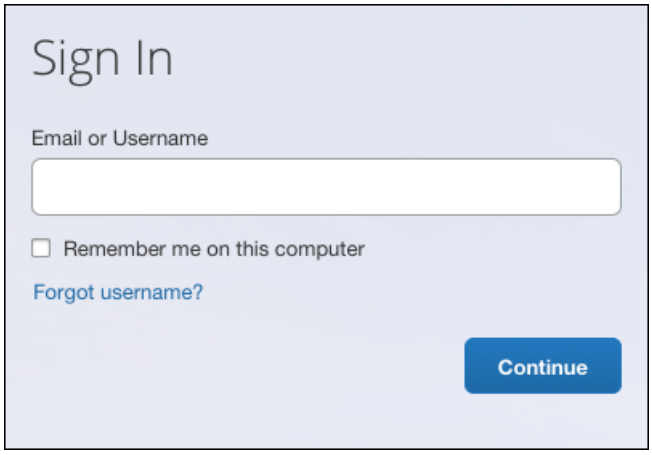
- **SSO Account**: If the user selects an account with SSO credentials, the user will enter an email, then the user will be directed to the IdP Single Sign-On portal. Once the user is authenticated, the SAP Concur **Home** page appears.
- **Username and Password**: The user is directed to an additional **Sign In** page to enter a password. The user then clicks **Sign In**. Once the user is authenticated, the SAP Concur **Home** page appears.

When all of the accounts have been added, a return user will select the account they want to use to log in to SAP Concur.

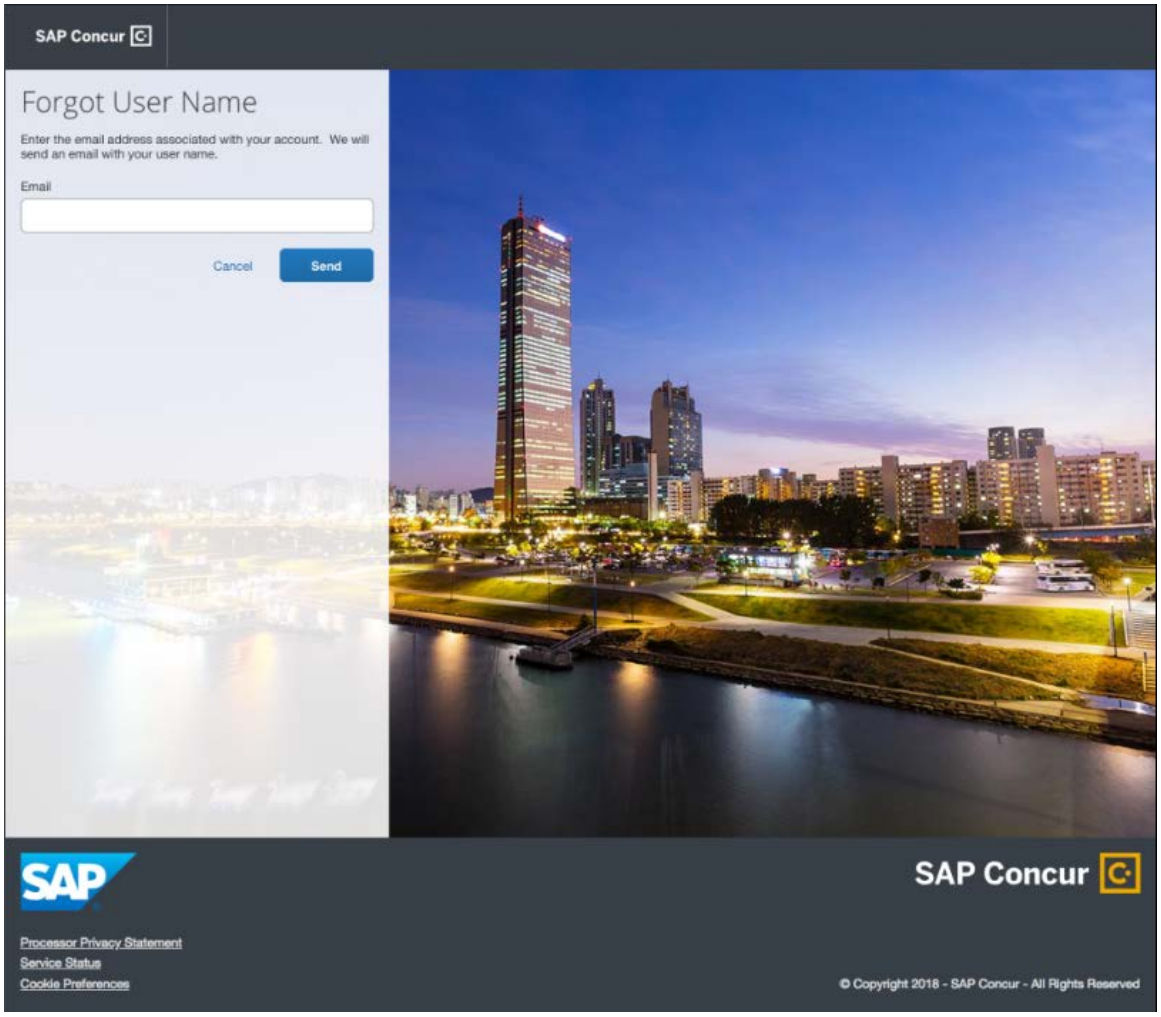


FORGOT USER NAME

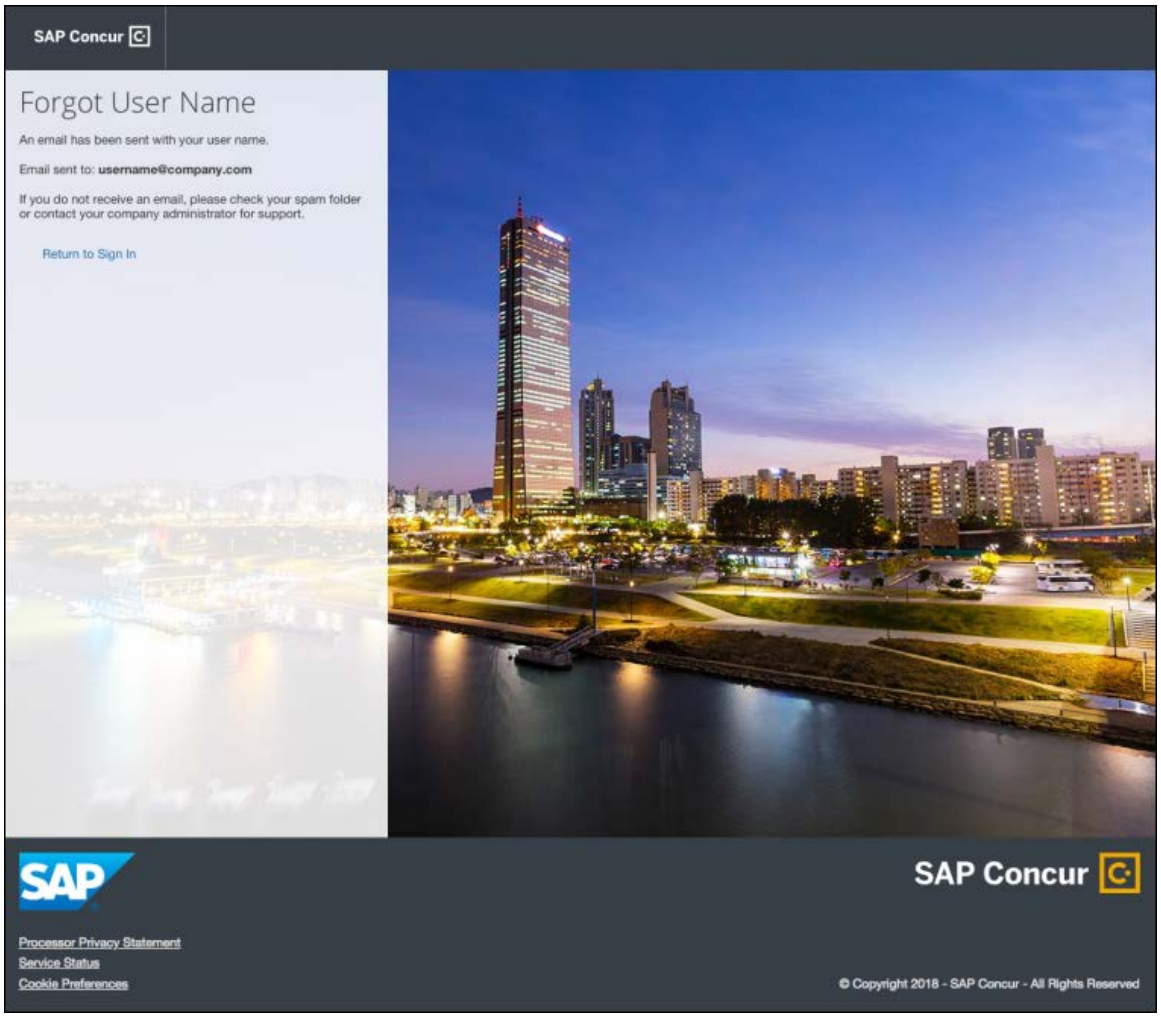
If a user forgets their user name, the user will click the **Forgot username?** link on the **Sign In** page.



Next, the **Forgot User Name** page appears. On the **Forgot User** Name page, the user will enter their email and click **Send** to have an email sent to a verified email account. The email will contain their user name.



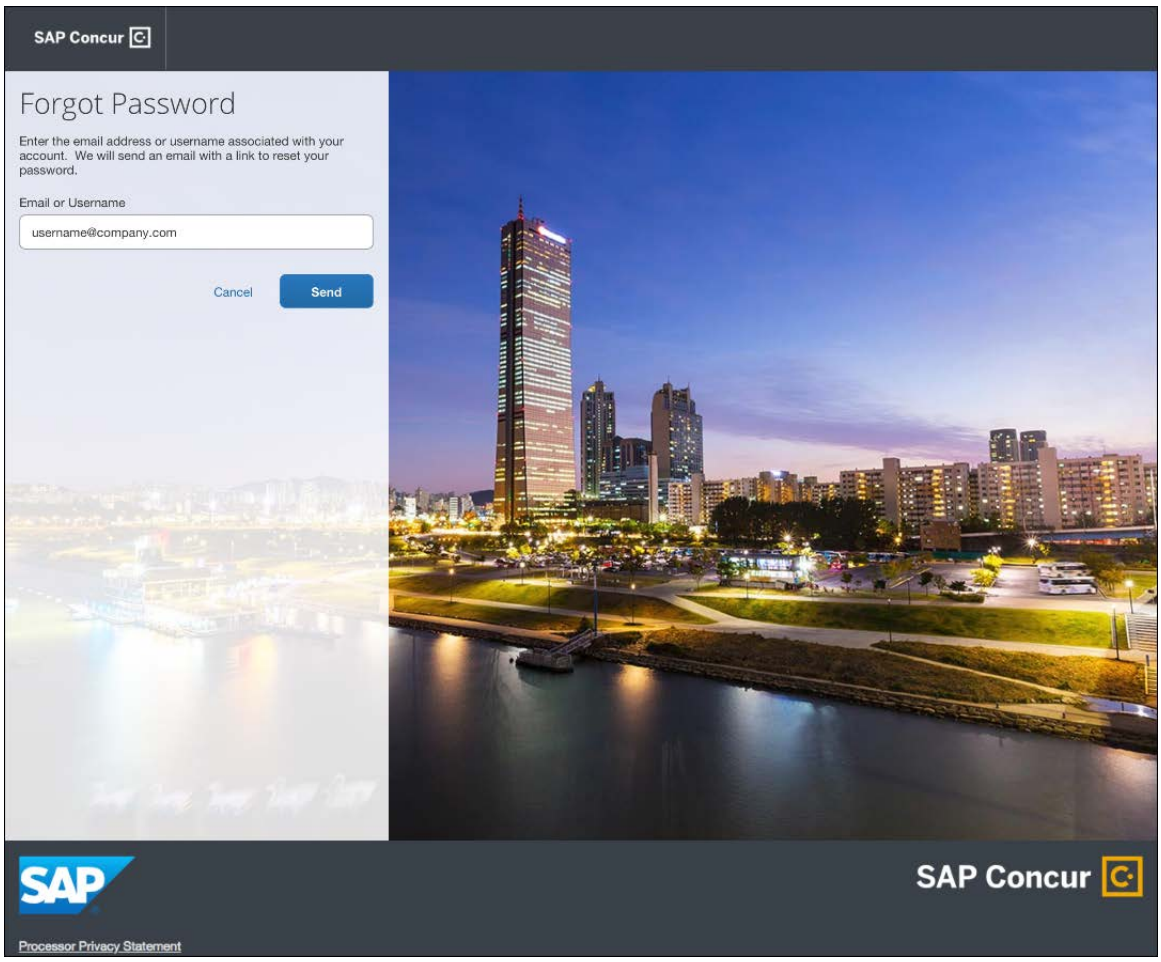
The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



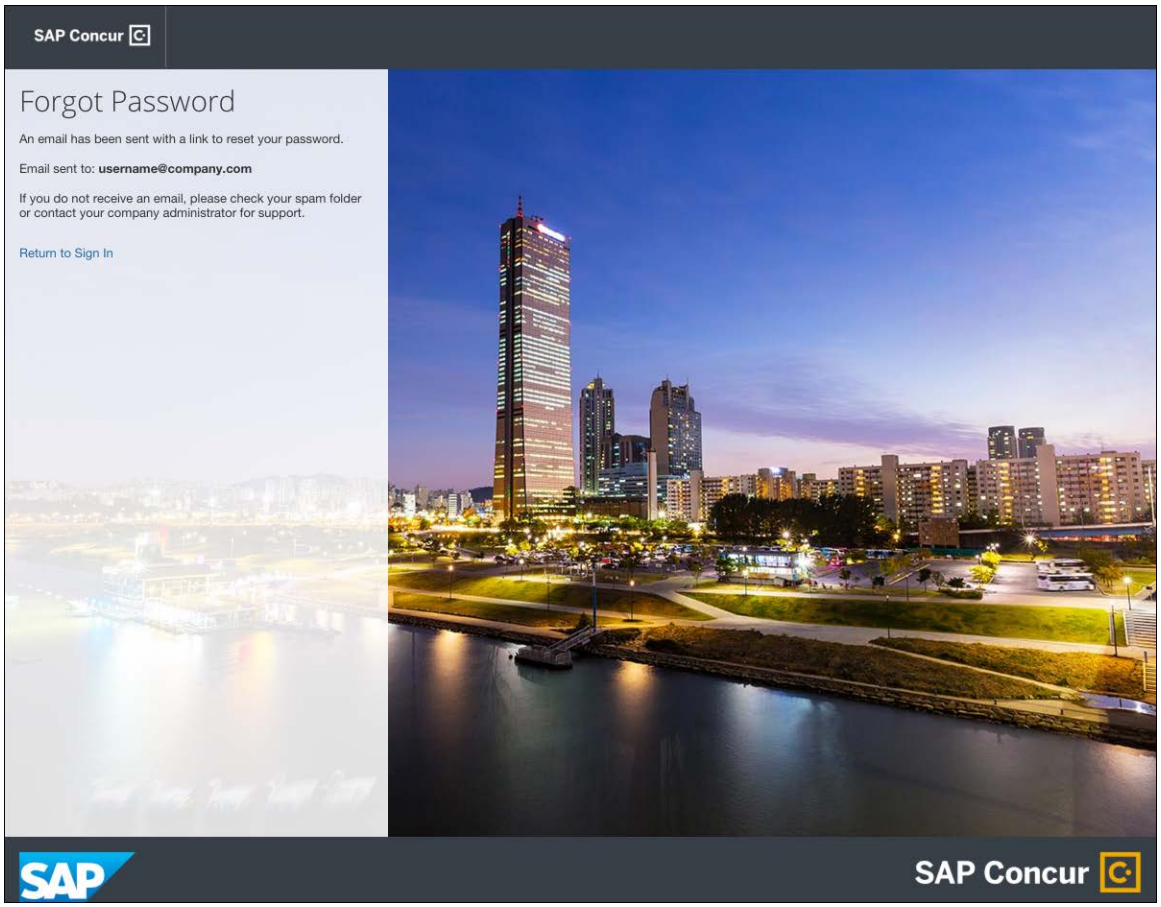
INVALID PASSWORD

If a user forgets their password, an on-screen message will appear alerting the user. The user will then click **Send** to have a password reset email sent to their verified email account.

SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.



The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



Configuration / Feature Activation

Configuration information will be provided in a future release note.

Miscellaneous

Planned Changes Archive Deactivated User Data

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet customer expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more

efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for *at least three years*. The archive process moves the deactivated user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

BUSINESS PURPOSE / CLIENT BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for the inactive users' personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that customers are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce the date via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, and admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

> **A.** SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

A. SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – users that have been "marked inactive" in the SAP Concur system. A user must be deactivated for *over 3 years* without having been re-activated to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

A. *For Professional Edition*, the most significant difference would occur in **Company Admin > User Administration**.

However, once user information is archived:

- From within User Administration, if the **Use Travel Advanced Filters** option is selected (enabled), the user will not be visible.
- From within User Administration, if the **Use Expense Advanced Filters** option is selected (enabled), you will be able to see the user in search results as deactivated.
    - If you click the user's name, you will receive an error message: *The selected user exists in the Expense or Invoice application but the user contains conflicting or missing data. Contact Concur Client Support to request help in resolving this error.*
    - If you click the icon in the **Profile** column, you will receive the generic error message.
    - If you click the user's login ID, you will see no historical login information for that user.
- If another user has the Self-Assigning Assistant permission or the user is a Proxy, who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive a "switching user" error message.
- From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- These users will not have access to any of their past travel history.
- For Expense, the user would have access to their expense history if:
  - That history has not been removed by a Data Retention policy.
  - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

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

Client Notifications

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

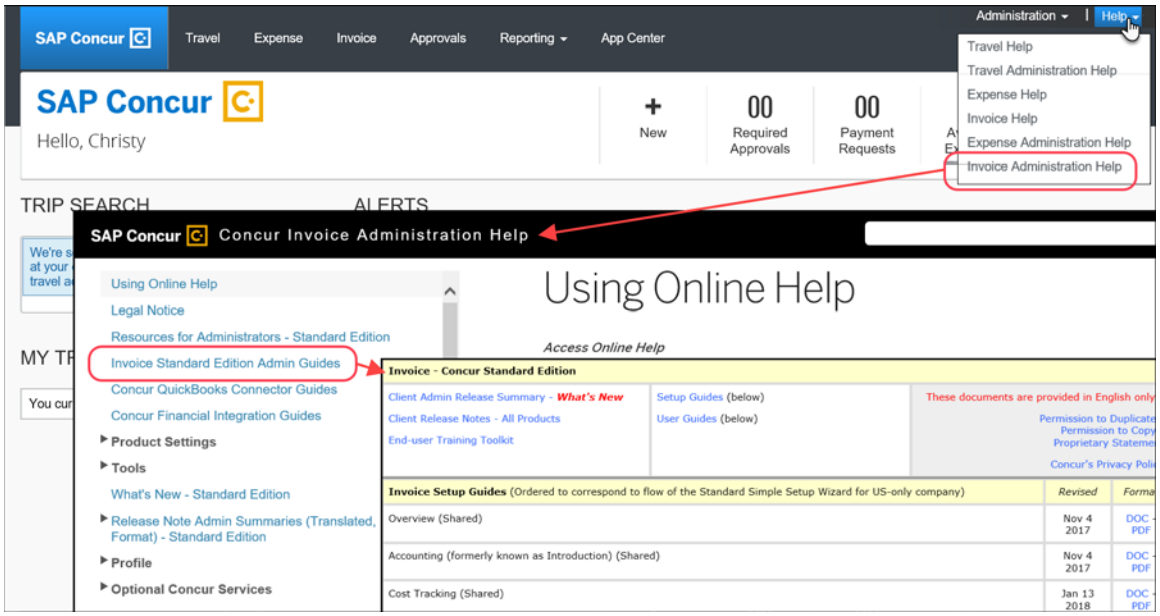
The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

A user who is assigned an admin role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through **Invoice Administration Help**.

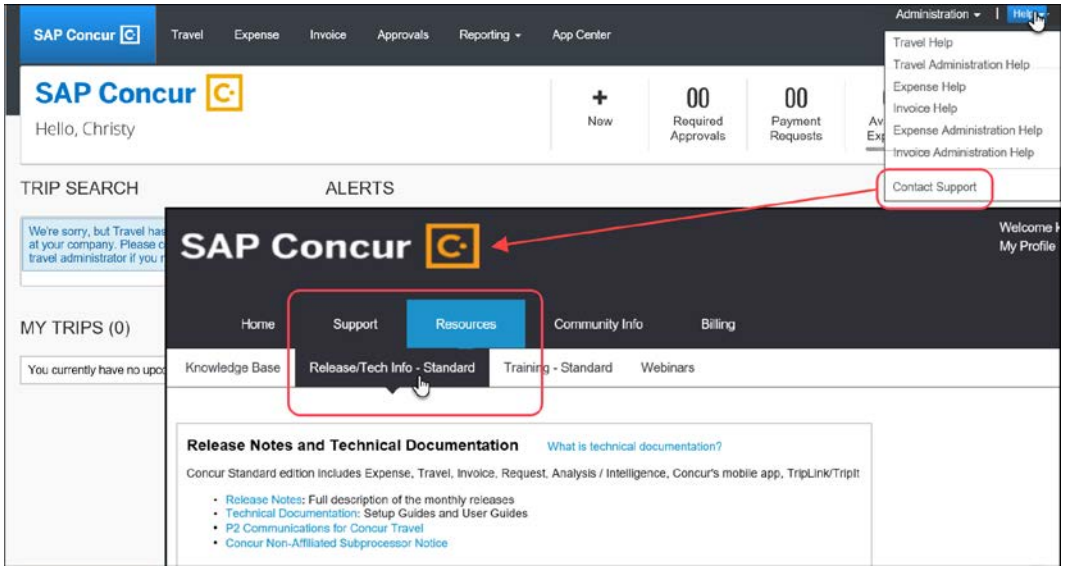


SAP Concur Support Portal – Selected Users

Users who are assigned the correct SAP Concur support portal permissions can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through the SAP Concur support portal.

To access the SAP Concur support portal (for users with the correct permissions):

1. Click **Help > Contact Support**.
2. On the support page, click **Resources > Release/Tech Info**.



SAP Concur Release Notes **Invoice Standard**	
Month	**Audience**
Release Date: December 8, 2018 Initial Post: Friday, December 7, 3:00 PM PST	SAP Concur Client FINAL

Contents

Legal Disclaimer

Release Notes

This document contains the release notes for the Concur Invoice functionality for the standard edition.

Concur Invoice

New Import Functionality Available for Electronic Invoices

Overview

Concur Invoice Standard clients can now import electronic invoices (e-invoices) into Concur Invoice through the Payment Request Import functionality. With this functionality, clients can import their e-invoices into Concur Invoice by supplying SAP Concur with a file containing e-invoice data that conforms to the specifications described in the *Payment Request Import V2 (Current) Specification*.

BUSINESS PURPOSE / CLIENT BENEFIT

This functionality makes it easier for clients to import invoice data into Concur Invoice.

Configuration / Feature Activation

This feature is available for purchase. Clients who want to import e-invoices into Concur Invoice through the Payment Request Import functionality must contact their SAP Concur account manager to enable it.

📖 For more information, refer to the Invoice: Payment Request Import V2 (Current) Specification.

Reminder New User Interface for Concur Invoice Available for Client Review and Opt-In

Overview

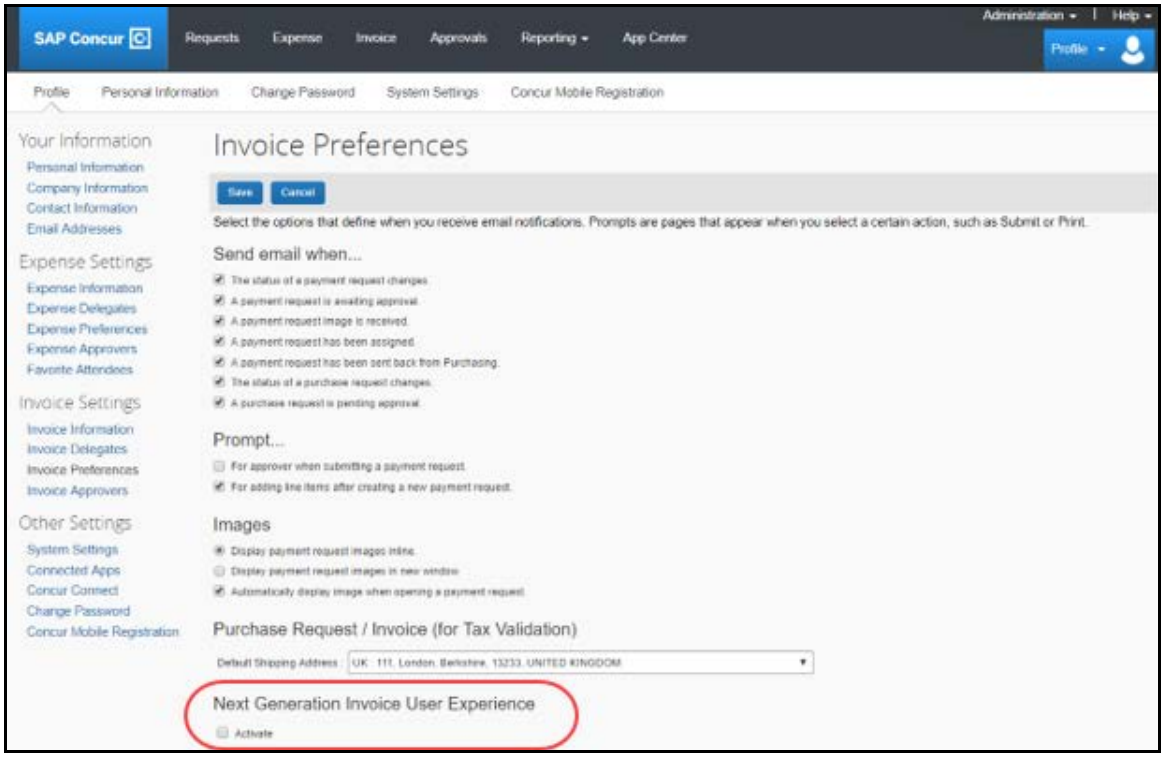
Clients still have the opportunity to familiarize themselves with the new user interface as SAP Concur prepares for general availability targeting the first quarter in 2019.

BUSINESS PURPOSE / CLIENT BENEFIT

The new Concur Invoice user interface enables clients to work more efficiently and provides them greater visibility into their invoices in flight.

Configuration / Feature Activation

Clients can activate this feature on the **Invoice Preferences** page by selecting (enabling) the **Activate** check box in the **Next Generation Invoice User Experience** section.



For more information, refer to the *New User Experience for Concur Invoice Client Fact Sheet* and the ***Planned Changes** New User Interface for Concur Invoice Soon Available* release note in this document.

Vendor Management

Descriptions Tab Added to Vendor Import and Vendor Banking Import Templates

Overview

The downloadable Vendor Import and Vendor Banking Import templates now include a new tab that provides details about the columns in the template.

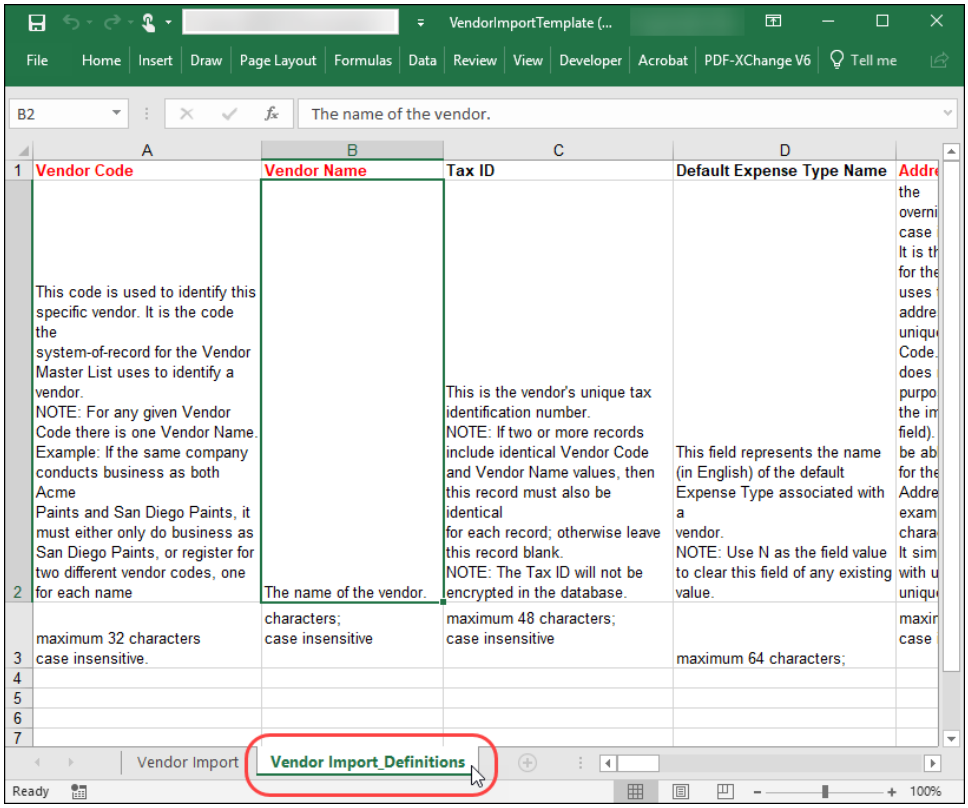
NOTE: The Vendor Banking Import template is available to entities with Invoice Pay enabled.

BUSINESS PURPOSE / CLIENT BENEFIT

The additional details help clients ensure that the information in the vendor import template meets the requirements of the fields into which the information will be imported.

What the Vendor Manager Sees

When the Vendor Manager downloads and opens the Vendor Import or Vendor Banking Import template, they see a new tab, **Vendor Import_Definitions**, in the file.



Configuration / Feature Activation

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

For more information about the vendor import feature, refer to *Invoice: Vendor Import (On-Demand) User Guide for Concur Standard Edition*.

Vendor Import Messages Improved

Overview

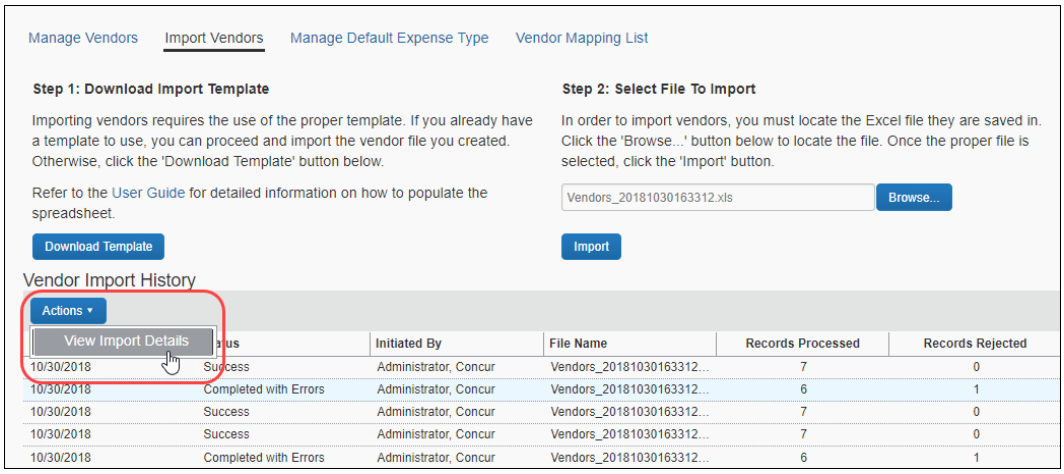
Some of the messages that are displayed in Vendor Manager when clients import vendors using the vendor import template have been improved.

BUSINESS PURPOSE / CLIENT BENEFIT

The improved messages more clearly describe issues that were encountered during the import process so that the Vendor Manager can more easily identify and address these import issues.

What the Vendor Manager Sees

The Vendor Manager sees the improved messages when they view the **Import Details** page for a selected import by selecting the import from the **View Import History** list, and then choosing **View Import Details** from the **Actions** menu.



Configuration / Feature Activation

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

Product Settings

Cost Tracking Has New Look, New Name – Released November 27, 2018

Overview

The **Cost Tracking** page in Product Settings now has a new look and flow, and a new name. All existing functionality remains with improved usability for field setup and management.

This feature was released on November 27, 2018.

The enhancements include the following:

- The **Cost Tracking** page has been renamed to **Manage Custom Fields**. The new **Manage Custom Fields** page enables client admins to manage custom fields starting from one page. **Linked Lists** are renamed to **Multi-Level Lists**.
- A new **Add New Field** page is accessible from the **Manage Custom Fields** page. The **Add New Field** page enables client admins to create fields by selecting the field's type and then selecting field options. Client admins can then opt to add list items for the new field, add another field, or return to the **Manage Custom Fields** page.
- Admins can create up to 12 custom fields, which can be created by typing in a custom field name or choosing from a list of suggestions. Previously, a maximum of 12 custom fields were allowed, but only six could be fields created by typing in a custom field name. The remaining six had to be chosen from the provided list. ***This feature will be available to everyone on Wednesday, December 5th, 2018. Until then, only six of the 12 fields can be created by typing in a field name.***

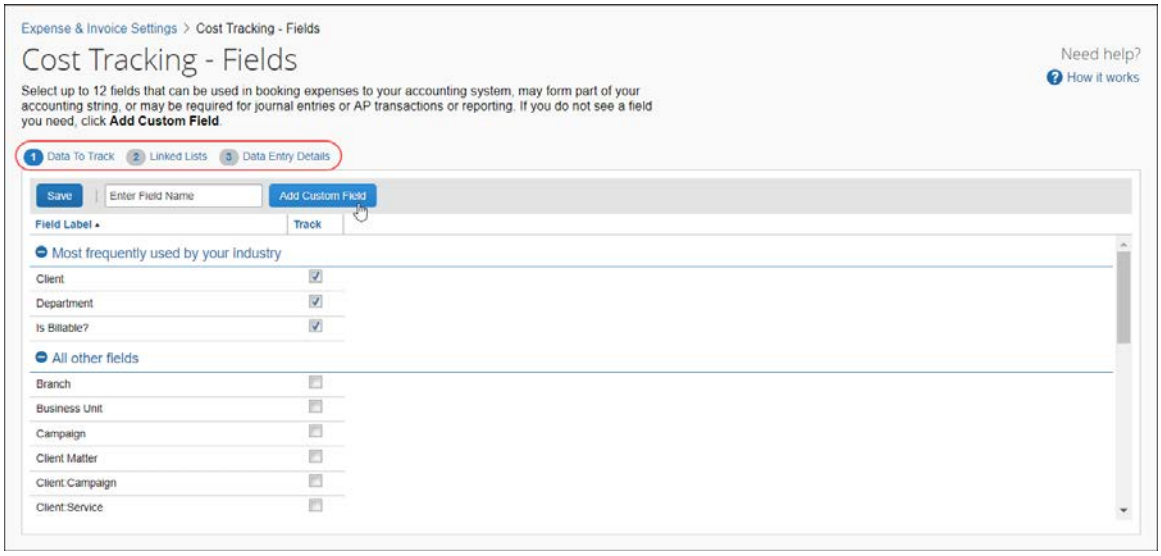
BUSINESS PURPOSE / CLIENT BENEFIT

This feature improves custom field management by providing a better end-user experience.

What the Admin Sees

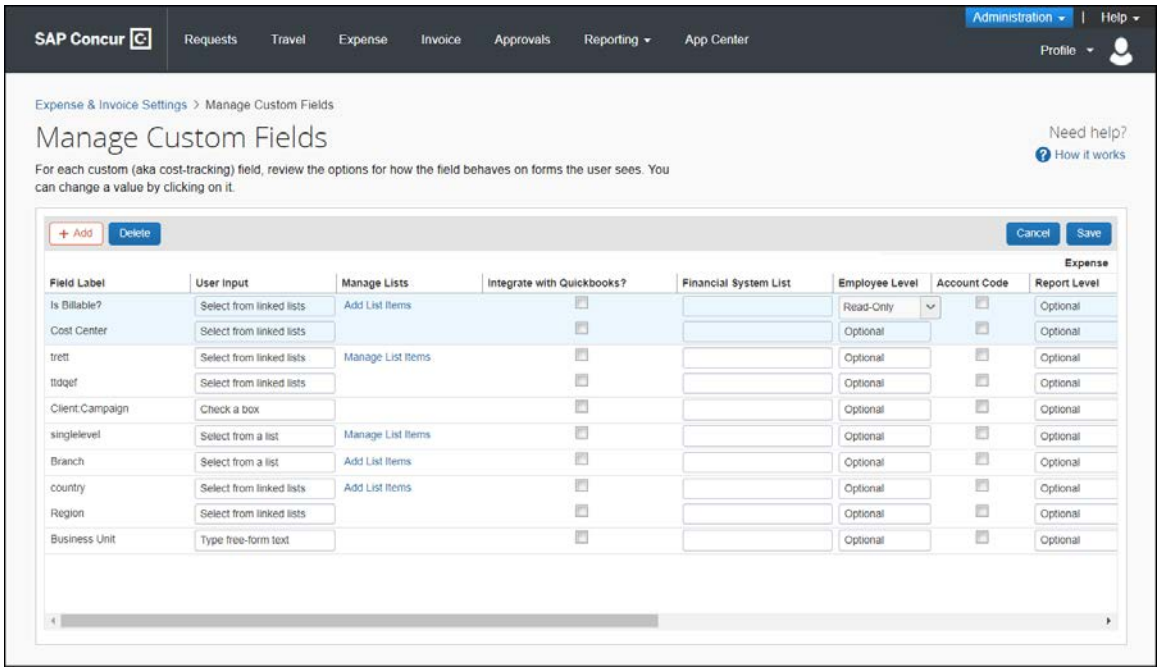
Before

The previous **Cost Tracking – Fields** page included three field management tabs: **Data To Track**, **Linked Lists**, and **Data Entry Details**.



After

The existing **Data Entry Details** page has been renamed to **Manage Custom Fields** and there are new buttons to add and delete custom fields, replacing functionality previously located on the **Select Fields** page.

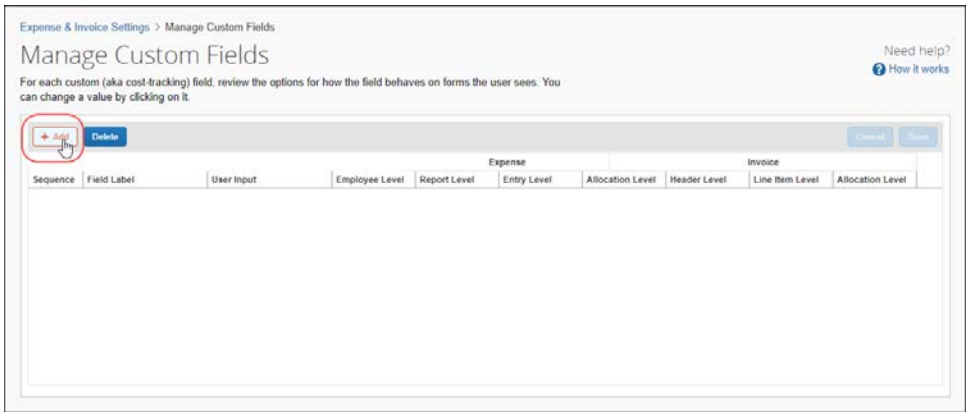


ADD NEW FIELDS

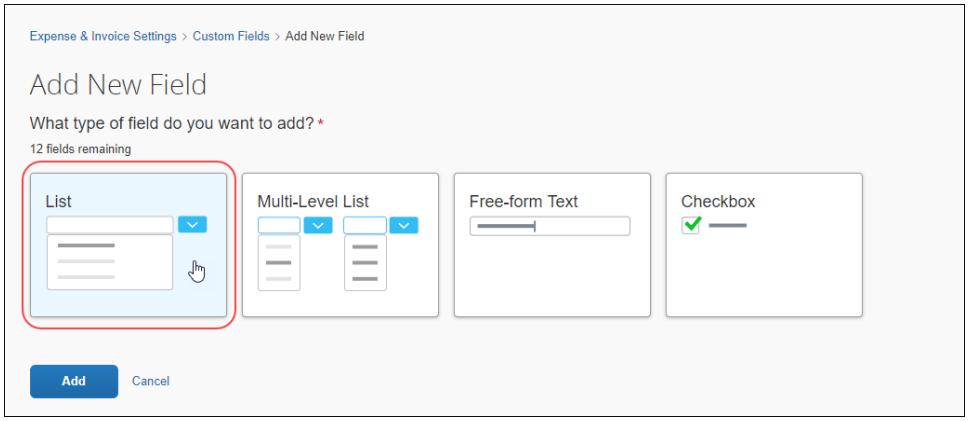
On the **Add New Field** page, client admins can create the following field types: list field, multi-level list (composed of two or more levels), free-form text, and check box. Admins can add up to 12 custom fields by typing in a custom field name or choosing from a list of suggested field names.

To add a new field:

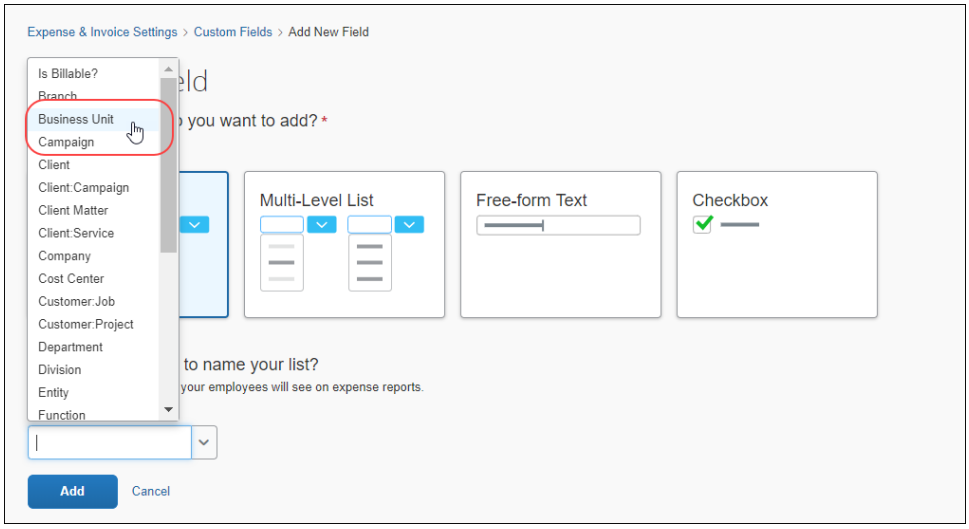
1. On the **Manage Custom Fields** page, click **Add** to open the **Add New Field** page.



2. Click on the type of field you want to add.

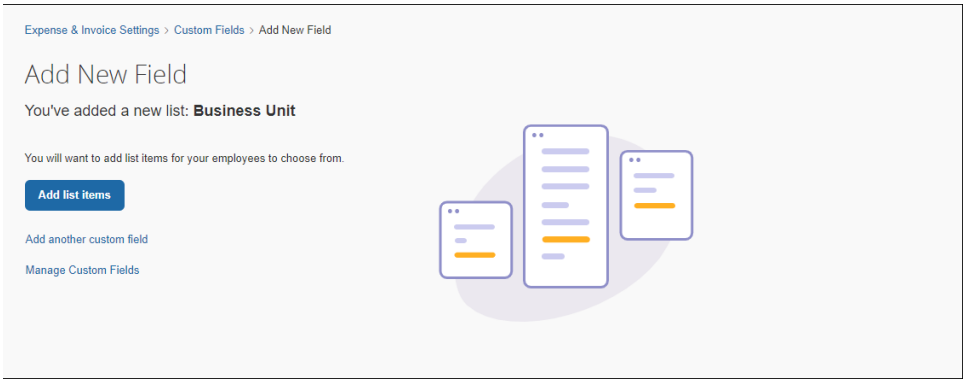


3. In the **What would you like to name your list?** section, in the **Field Name** list, select a name or type in a custom field name. This name will appear as a field label when the field is displayed.



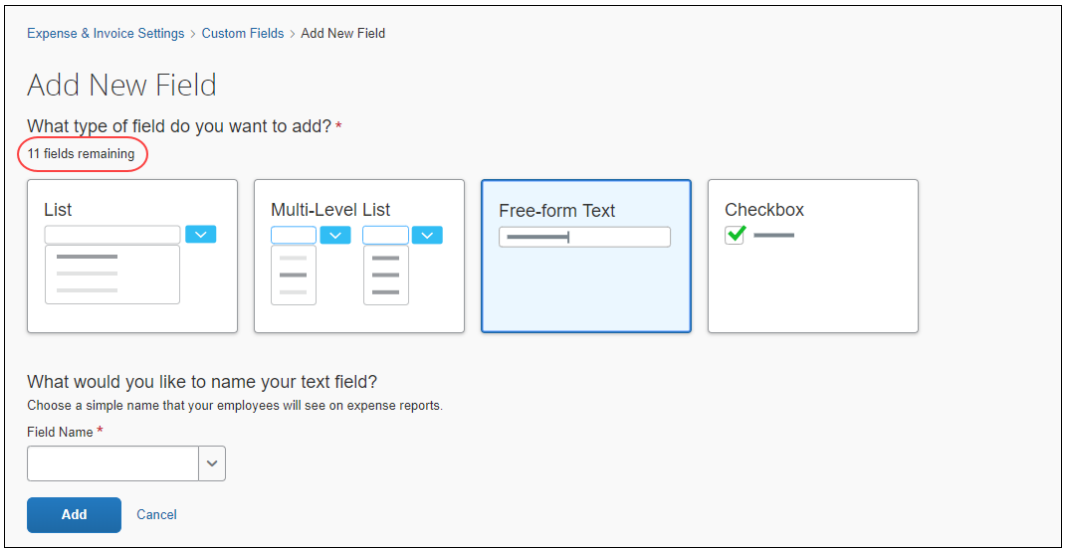
4. Click **Add**.

   A message confirms the addition of the new field.



After you add a field, you can add list items, add another custom field, or return to the **Manage Custom Fields** page.

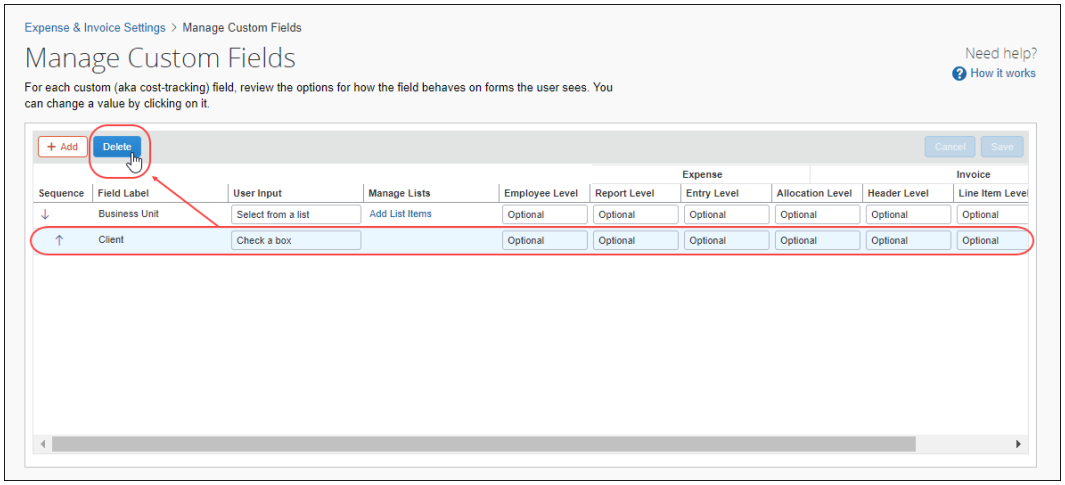
If you choose to add another new field, an on-screen message appears noting how many available custom fields you have remaining.



DELETE FIELDS

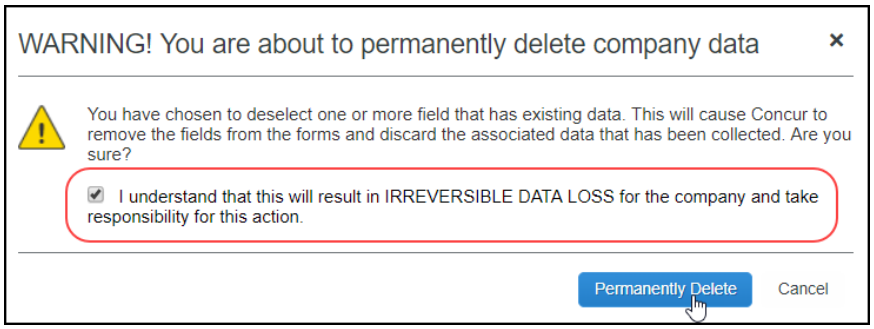
To delete a field:

1. On the **Manage Custom Fields** page, select the field you want to remove.



2. Click **Delete**.

3. In the message box, select the check box to agree to the terms for removing the fields.



4. Click **Permanently Delete** to remove the field.

Configuration / Feature Activation

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

For more information, refer to the *Shared: Cost Tracking Setup Guide*.

SAP Concur Email

Ongoing Email Infrastructure Change - Add IP Addresses to Safe Senders List

Overview

SAP Concur is transitioning to a new email infrastructure for outbound email from our products to SAP Concur users. Because of this, companies that filter inbound email based on the sending IP address must add the new IP addresses to their safe senders list to ensure that their users receive email from SAP Concur.

Concur Expense Only

Be aware that – at this time – the issue described here affects only companies that use Concur Expense ***and*** filter incoming email based on IP addresses. (This includes all editions of Concur Expense – whether the company uses Concur Expense by itself or integrated with any other SAP Concur product or service.) Other SAP Concur services (such as Concur Travel and Concur Pay) are not currently affected.

We are currently targeting the first quarter of 2019 to make additional changes Please monitor the release notes for more information about the timing of the additional changes.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If you use Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure any required safe senders list for IP addresses are updated so that your users continue to receive SAP Concur email without interruptions.

Ongoing Updated Email Format

Overview

SAP Concur is in the process of updating the format of all email notifications. These changes will provide a fresher, more consistent look-and-feel across all SAP Concur services.

BUSINESS PURPOSE / CLIENT BENEFIT

The intent is to provide a consistent, updated look for users.

IMPORTANT

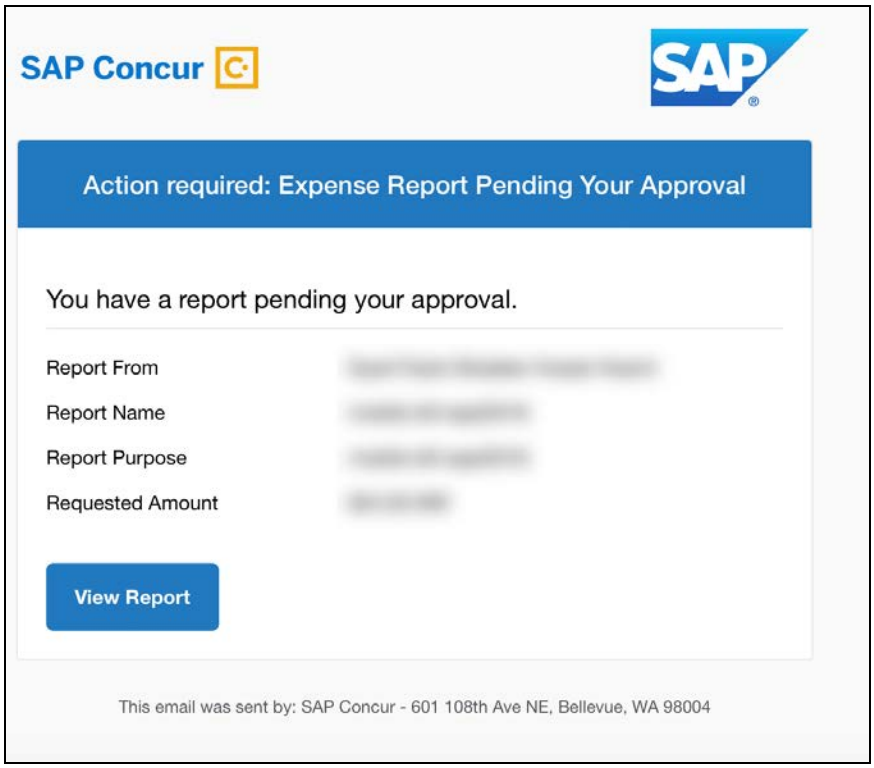
Note the following:

- The email content has not changed – just the look and feel.
- The changes will appear over time. Each product team (Concur Expense, Invoice, Travel, etc.) decides when to use the new format. Timing will be based on resource availability and the priority of other scheduled enhancements.
- Do not expect all product emails to change at the same time. For example, perhaps Concur Expense approval email will be first, and then other Concur Expense notifications will follow.
- There is no assigned end date for the project. The changes might take longer than a year.
- Each team will provide release notes when their new emails are scheduled to appear.

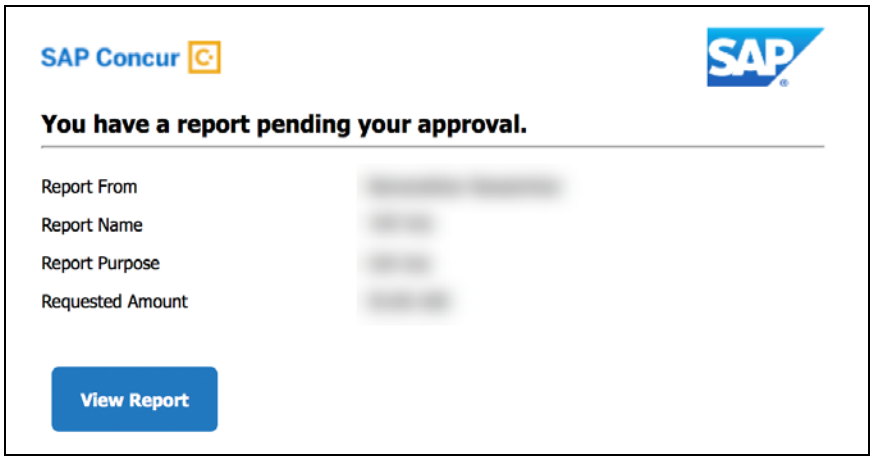
What the User Sees

The Concur Expense approval email is shown below. Over time, all emails generated from SAP Concur will have a similar look.

New Format



Current Format



Configuration / Feature Activation

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

Planned Changes

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

Concur Invoice

Planned Changes New User Interface for Concur Invoice Soon Available

Overview

SAP Concur will soon offer a new user experience that is particularly targeted at the Accounts Payable (AP) user who is constantly monitoring the health of the Invoice lifecycle within the system. With a new AP landing page, concepts of "call to action" and "work to zero" are being brought to the forefront to better inform AP users to ensure they are working on the highest priority task.

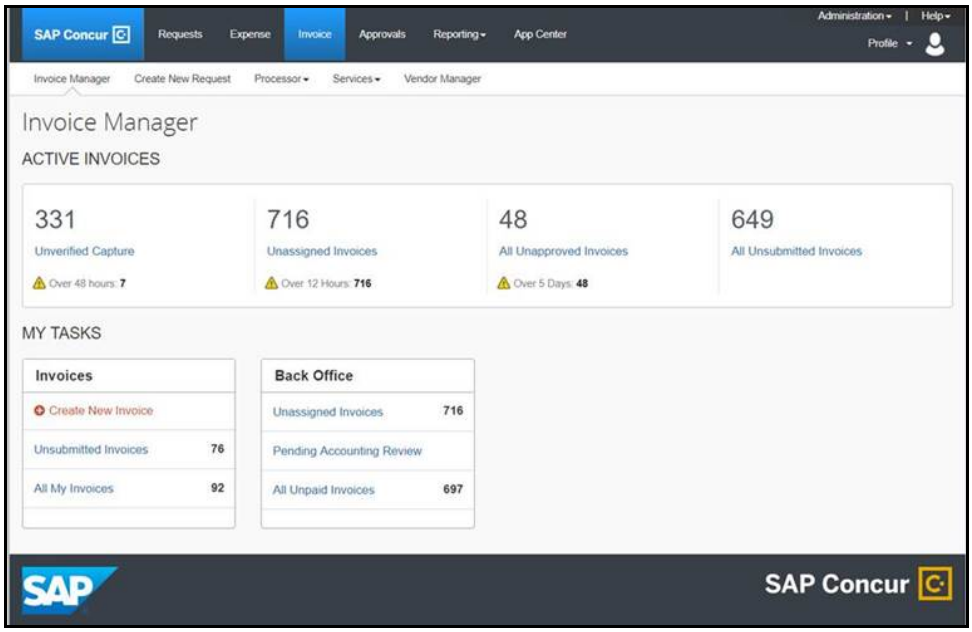
The new user interface in Concur Invoice that clients can now review and familiarize themselves with is targeted for general availability the first quarter in 2019.

BUSINESS PURPOSE / CLIENT BENEFIT

The new Concur Invoice user interface enables clients to work more efficiently and provides them greater visibility into their invoices in flight.

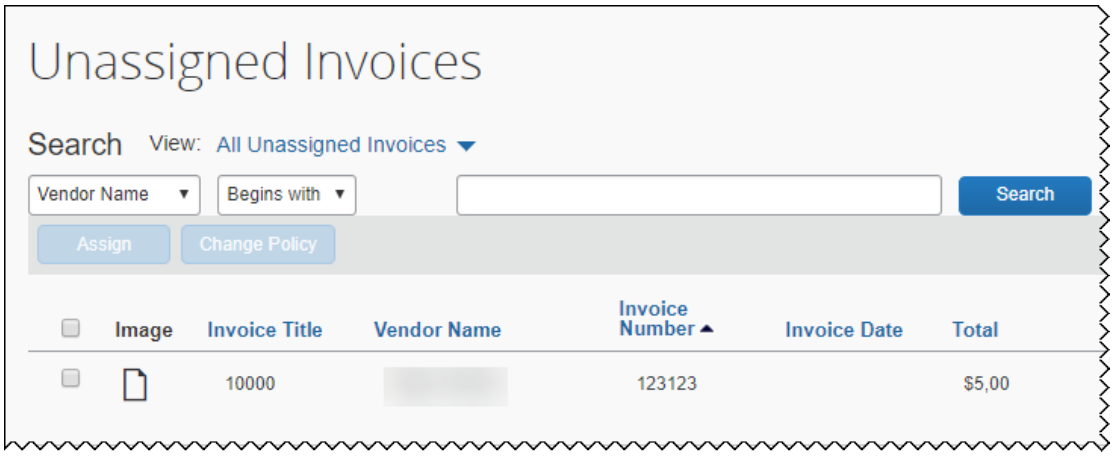
What the Invoice AP User and Invoice Processor See

The Invoice AP User and the Invoice Processor will now land on a new **Invoice Manager** page that provides key information about all active invoices.



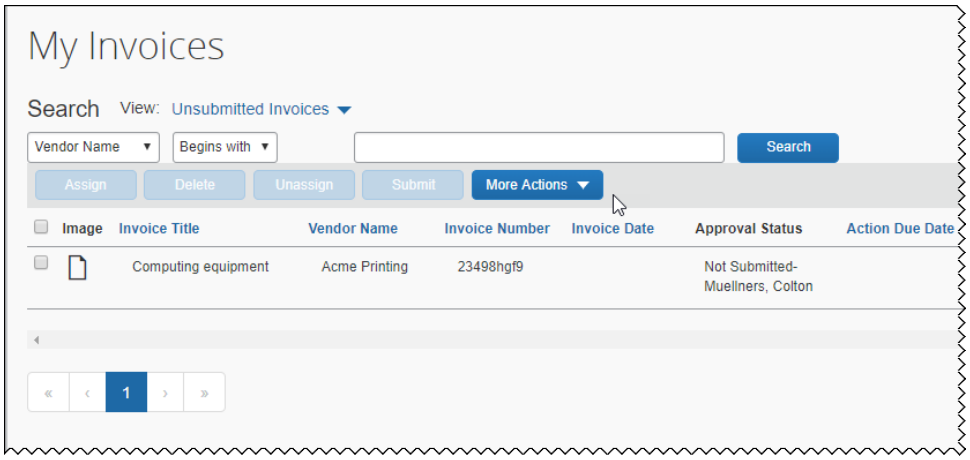
On the **Invoice Manager** tab, the Invoice AP User and Invoice Processor see new tiles and new sections including visibility into **Active Invoices** and **My Tasks** sections.

The Invoice Processor also sees a newly designed **Unassigned Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.



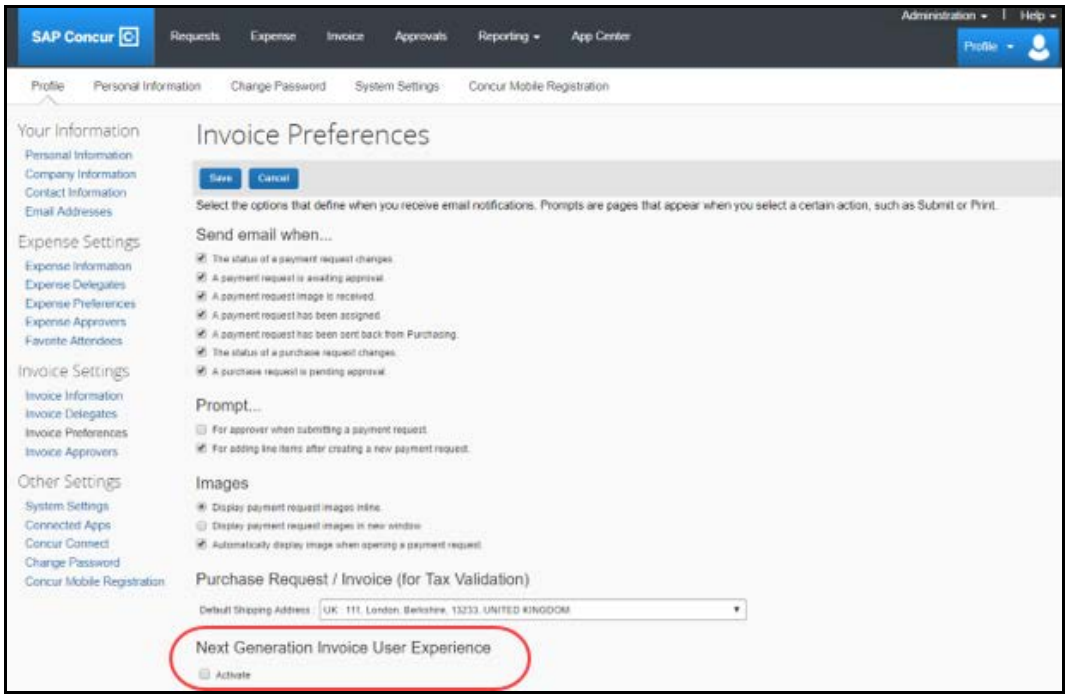
What the Invoice User Sees

Invoice users who have access to **My Requests**, will see a newly designed **My Invoices** page that is more modern and aligns with Next Gen UI initiatives across SAP Concur's Spend platform.



Configuration / Feature Activation

Clients can activate this feature on the **Invoice Preferences** page by selecting (enabling) the **Activate** check box in the **Next Generation Invoice User Experience** section.



NOTE: More information about the new Concur Invoice user interface will be made available in future release notes.

Planned Changes Payment Request(s) Renamed to Invoice(s)

Overview

In a future release, SAP Concur will replace instances of the term "payment request" and its iterations with the term "invoice" and its iterations. These changes will be made in the user interface, the Concur Invoice documentation, and in all other SAP Concur product documentation where it appears.

BUSINESS PURPOSE / CLIENT BENEFIT

This change helps to ensure that the terminology used in SAP Concur is consistent with industry standard terminology.

Configuration / Feature Activation

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

NOTE: The terminology change will occur when the new user interface for Concur Invoice becomes generally available.

Invoice E-Bunsho Timestamp

Planned Changes Updated Invoice E-Bunsho Timestamp Icon

Overview

The icon for the Invoice e-Bunsho Timestamp feature will be updated from an analog clock symbol (🕒) to a check mark symbol (✅).

BUSINESS PURPOSE / CLIENT BENEFIT

This change improves the usability of the feature.

What the User Sees

When the user views a list of their invoices on the **Invoice > My Requests > Payment Request List** page, if an invoice in the list includes a successfully timestamped invoice image, the e-Bunsho timestamp icon appears below the date in the **Invoice Date** column for that invoice.

Configuration / Feature Activation

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

Purchase Order

Planned Changes Import Now for PO and PO Receipt Imports

Overview

The Import Now feature enables clients to import PO and PO receipt files into Concur Invoice immediately without having to wait for an overnight scheduled import. This is beneficial for clients who need to import POs and PO receipts and work with them in the Concur Invoice product the same day they are created externally. This also allows clients to do multiple PO and PO receipt imports a day for more synchronized and up-to-date data.

NOTE: The Import Now feature is currently in an Early Adopter program. For more information, contact your SAP Concur representative.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature gives clients control over when and how frequently to import POs and PO receipts into Concur Invoice.

Configuration / Feature Activation

This enhancement is automatically available. To start using this feature, clients need to add the suffix "importnow" on their PO and PO receipt files that are transferred to their FTP site.

Current Import Naming Convention

The current naming conventions are as follows:

- PO import: poinvoice_EntityID_Date
- PO Receipt Import: purch_receipt_EntityID_Date

These naming conventions will remain as is today and the files will continue to be picked up and run on the existing schedule. Clients who wish to always import these records using the import now option should adjust their schedules accordingly and remove any scheduled jobs from the purchase order and purchase order receipt import job definitions.

Import Now Naming Convention

The Import Now naming conventions are as follows:

- PO Import: poinvoiceimportnow_EntityID_Date
- PO Receipt Import: purch_receiptimportnow_EntityID_Date

For the Import Now option, the PO receipt file is usually dependent on the PO file, so clients must coordinate their file transfer to the FTP site so that the PO file is always transferred first before the PO receipt file to ensure the PO's are imported before the receipts. The PO receipt Import Now function will not start until any active PO import running is completed. However, once the PO files are sent with the "importnow" suffix, they will be imported immediately when they are transferred to the FTP site.

NOTE: Clients must have an FTP site to use this feature.

Vendor Management

Planned Change Audit Trail for Vendor Changes

Overview

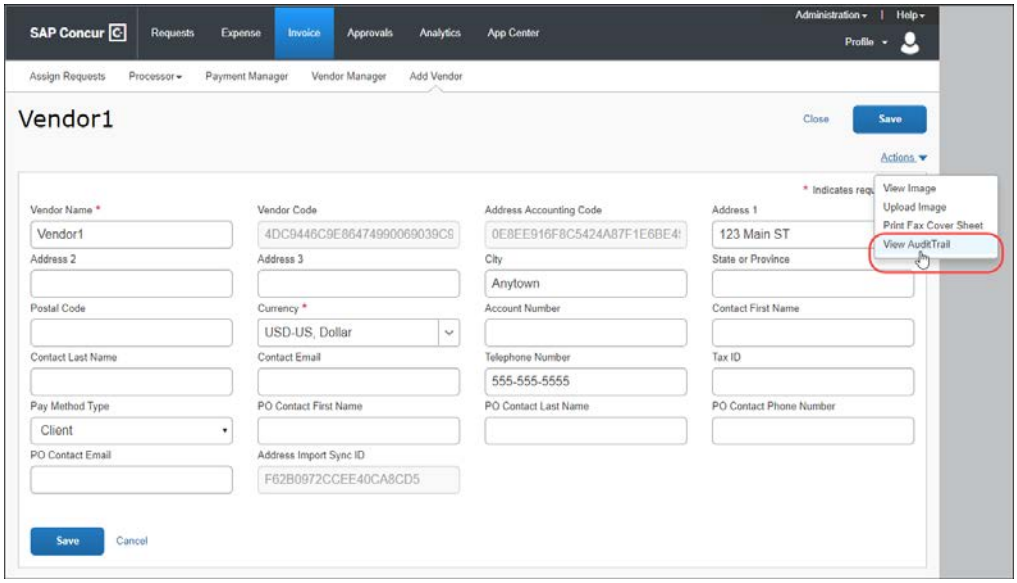
In a future release, clients with the Create and Approve Vendors feature enabled will be able to track changes to a vendor through the **Audit Trail** page within the vendor record in Vendor Manager. For example, when a vendor is approved or updated by the Vendor Manager, those actions will appear on the **Audit Trail** page.

BUSINESS PURPOSE / CLIENT BENEFIT

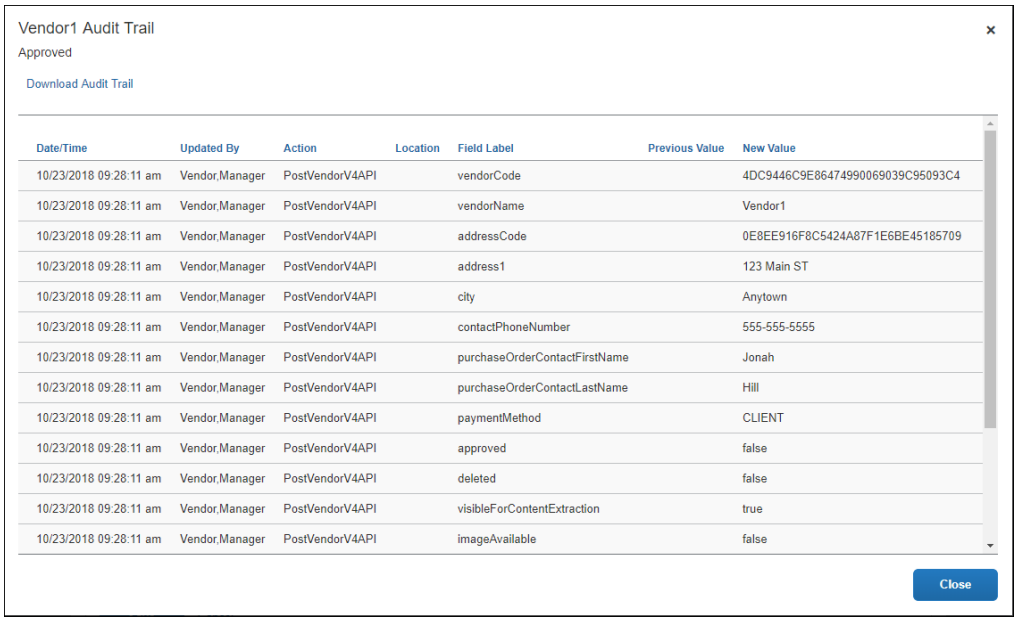
This change will enable users with the Invoice Vendor Manager role to track changes made to vendor information in Vendor Manager.

What the Vendor Manager Sees

Within an open vendor record, in the **Actions** menu, the Vendor Manager will see a new option, **View Audit Trail**.



After clicking the **View Audit Trail** option, the audit trail page for the vendor will appear.



Vendor1 Audit Trail

Approved

Download Audit Trail

Date/Time	Updated By	Action	Location	Field Label	Previous Value	New Value
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		vendorCode		4DC9446C9E86474990069039C95093C4
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		vendorName		Vendor1
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		addressCode		0E8EE916F8C5424A87F1E6BE45185709
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		address1		123 Main ST
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		city		Anytown
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		contactPhoneNumber		555-555-5555
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		purchaseOrderContactFirstName		Jonah
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		purchaseOrderContactLastName		Hill
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		paymentMethod		CLIENT
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		approved		false
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		deleted		false
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		visibleForContentExtraction		true
10/23/2018 09:28:11 am	Vendor,Manager	PostVendorV4API		imageAvailable		false

Close

Configuration / Feature Activation

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

Planned Changes Field Added to Default Vendor Information Form

Overview

In a future release, the default form for adding and updating vendor information will include the **Country** field.

The **Country** field contains the country associated with the vendor address.

BUSINESS PURPOSE / CLIENT BENEFIT

This field enables clients to include additional information about requested and approved vendors.

Configuration / Feature Activation

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

Planned Changes Create and Approve Vendors Available in Test Environments

Overview

In a future release, the Create and Approve Vendors Feature will be available in test environments.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables developers and implementation teams to work with the Create and Approve Vendors feature prior to moving to a production environment.

Configuration / Feature Activation

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

Budget

Planned Changes Workflows for Budget

Overview

In a future release, workflows will be available for Budget. Workflows define how the system routes invoices, expense reports, and requests through approval and processing steps. SAP Concur's flexible workflow feature for Budget allows companies to design workflows specifically tailored to their unique needs.

Without budget review, budgets may become fully consumed well before the end of a period or year leaving an organization with limited options and budget owners with, for example, exceeded budgets. In addition, early spending means spending that is more important to the organization will be declined because less important spending consumed the budget early on.

Combining budget review in the workflow adds value. Audit rules and workflow step rules can help organizations to add in controls when it makes sense to fine tune to an organization's specific needs.

Equally important is the determination when a spending item is regarded as committed toward a budget. In most organizations, the commit is when a spending item is paid; it went through most if not all approval steps. In other organizations, the commit occurs much earlier. As soon as a purchase request or an authorization request is approved it is regarded as "promised".

BUSINESS PURPOSE / CLIENT BENEFIT

This feature will provide clients with control over the budget spend to, for example, avoid exceeded budgets too early in a budget period or budget year.

Configuration / Feature Activation

The administrator must configure this feature on the **Approval Routing** page.

To access the Approval Routing page:

1. Click **Administration** > **Invoice Settings** or **Expense Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice* or *Expense* depending on the product you are working with.
3. In the **Policy** section, click **Show Advanced Settings**.
4. Click **Invoice Approvals**, **Expense Approvals**, or **Purchase Request Approvals**.

Product Settings

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur

Overview

Single Sign-On allows users to access multiple applications using one set of login credentials. Currently, SAP Concur has two methods for signing in: with a user name and password or using SSO with identity provider (IdP) credentials, such as a user's login credentials for their organization.

SSO is currently supported for Concur Expense, Invoice, Request, and Travel. SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur which provides SAP Concur clients with a self-service option for setting up SSO for their organization.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Access To Concur** section of Product Settings.

- Single Sign-On can be managed for Standard Travel if it is bundled with Concur Expense, Invoice, and/or Request.
- For standalone Standard Travel, the Manage Single Sign-On feature will be accessible from the **Travel Settings** page.

Other SAP Concur products and services are outside the scope of this initial release.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides SAP Concur clients with a self-service option for setting up SSO.

Configuration / Feature Activation

Configuration information will be provided in a future release note.

SAP Concur

Planned Changes New SAP Concur Sign In Page

Overview

SAP Concur is planning to add a new **Sign In** page, providing an updated login experience for users who log in with user name and password credentials. Current Single Sign-On (SSO) users will log in without having to enter additional credentials. This feature is planned for 2019.

The new **Sign In** page feature includes the following:

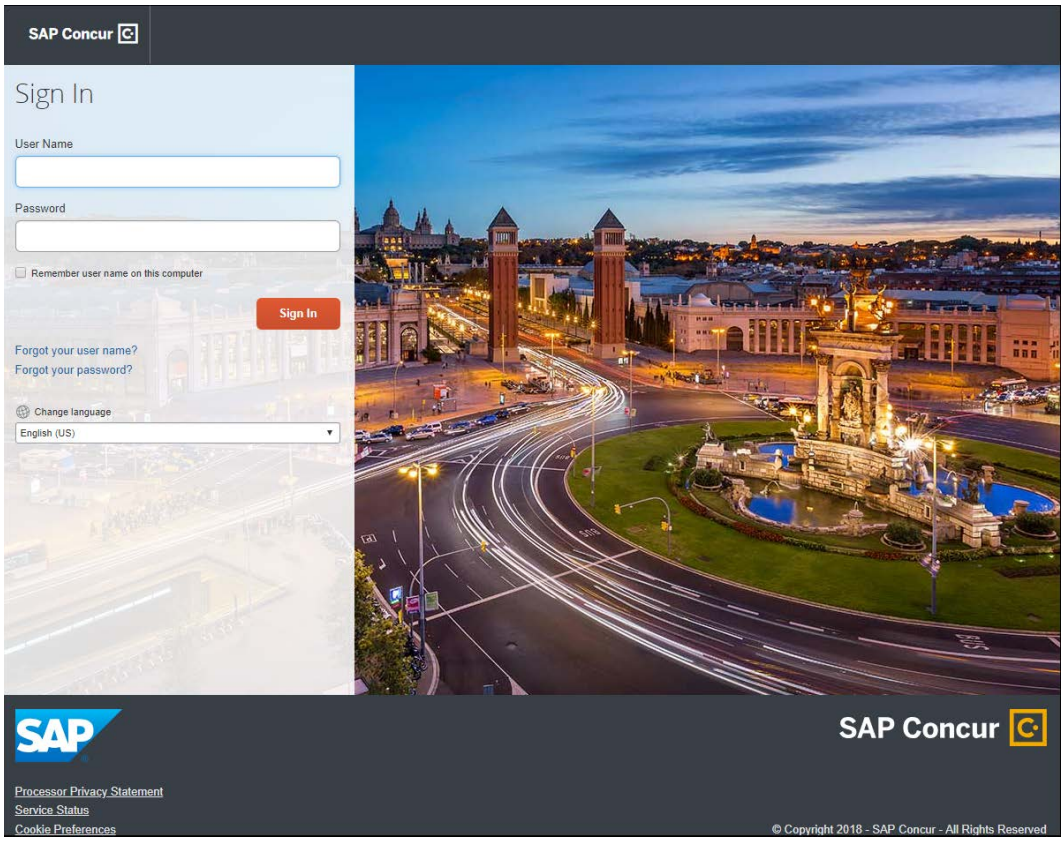
- **Two-step login**: provides enhanced security, meets current industry standards, and provides a better log in success rate
- **Multi-account login**: allows administrators to log in with multiple accounts
- **Password hint removal**: provides better security for users and SAP Concur
- **User avatar**: enhances the user experience (planned for a future release)

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security and a faster, more convenient experience for users logging in to SAP Concur products and services.

What the User Sees – Current Sign In Page

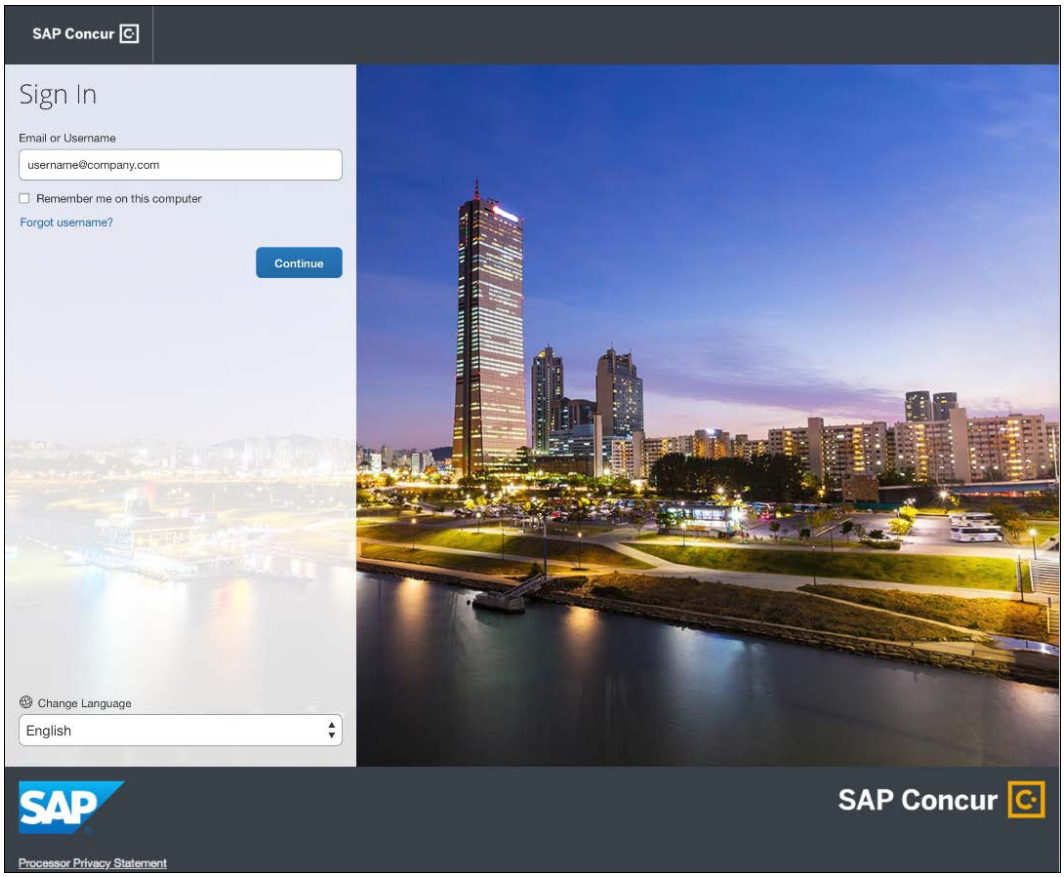
The SAP Concur **Sign In** page currently appears with **User Name** and **Password** fields, and a **Sign In** button. Once a user is authenticated, the SAP Concur **Home** page appears.



What the User Sees – New Sign In Page

The new SAP Concur **Sign In** page will have an **Email or Username** field and a **Continue** button. The user will type in their email or username. The user can select the **Remember me on this computer** check box, so their email or username is stored and will not have to be reentered the next time they log in to SAP Concur.

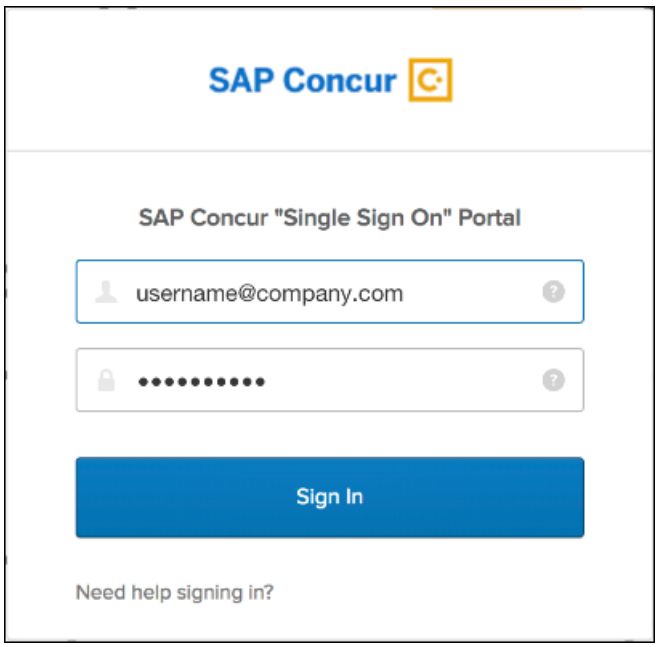
After entering their email or username, the user will then click **Continue**.



Depending on the client's implementation of SAP Concur, users will then be directed to the designated Identity Provider (IdP) Single Sign-On portal or an additional **Sign In** page.

SSO Users

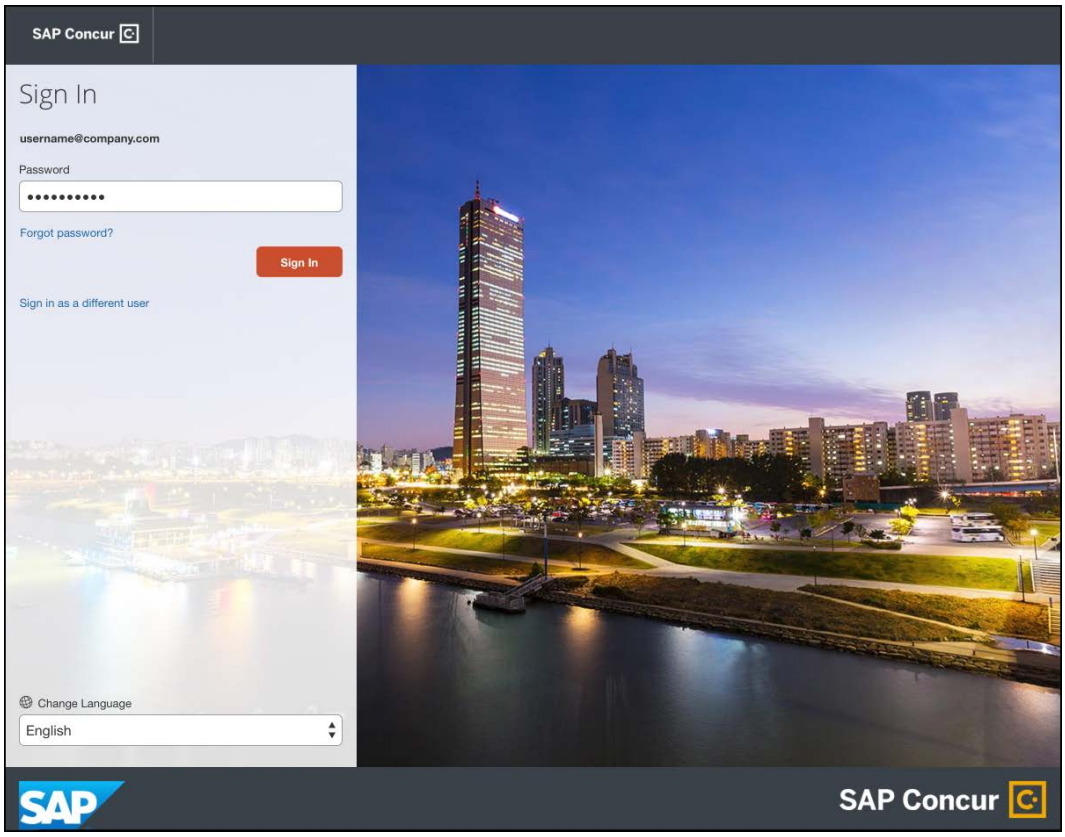
When the designated Identity Provider (IdP) Single Sign-On portal appears (similar to the one shown below), the user will enter their email or username, and their password, and then click **Sign In**. After being authenticated, the user will be directed to the SAP Concur **Home** page.



After being authenticated, the user will be directed to the SAP Concur **Home** page.

USERS WITH USERNAMES AND PASSWORDS

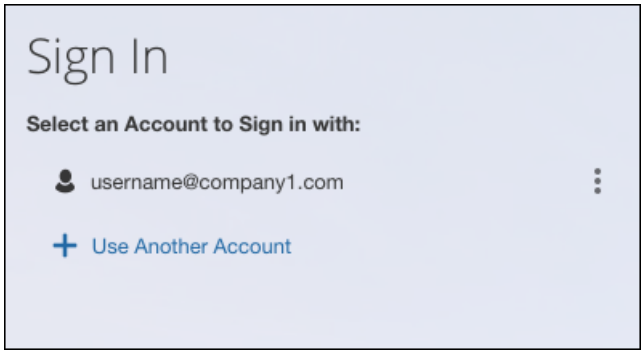
The user will be directed to an additional **Sign In** page. The user will enter a password and click **Sign In**. The system will then authenticate the user's credentials.



Once the user's password is verified, the SAP Concur **Home** page appears.

RETURN USERS

If a returning user selected the **Remember me on this computer** check box during their initial login session, they will see their email or user name displayed on the **Sign In** page. Users who did not select the **Remember me on this computer** check box will log in as they did initially.



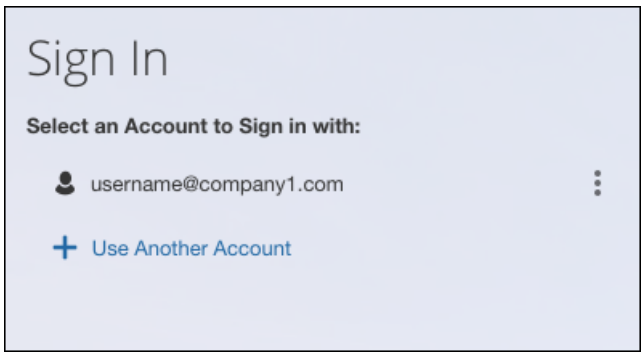
The user will click on their username, and then and then one of the following occurs:

- **SSO Users**: The user will be directed to the SAP Concur **Home** page.
- **Users with Usernames and Passwords**: On the **Sign In** page, the user will enter a password and then click **Sign In**. The user will then be directed to the SAP Concur **Home** page.

USERS WITH MULTIPLE ACCOUNTS

SAP Concur users with multiple login accounts have more than one login option depending on the user role or account they want to use. The user will first log in to SAP Concur using one of their accounts. Once successfully logged in, the user logs out of the system.

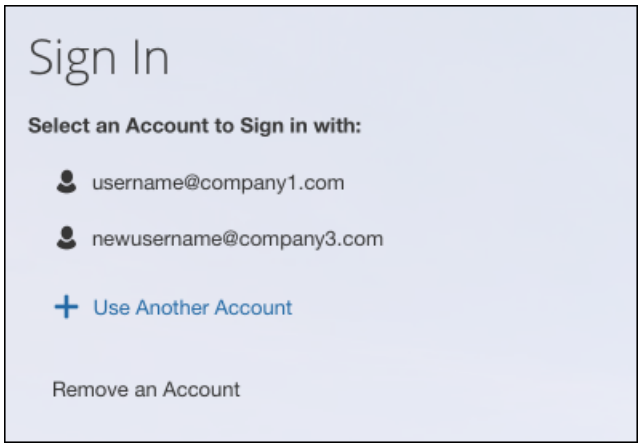
To add another account, on the **Sign In** page, the user clicks the **Use Another Account** link.



The next login step depends on the account type the user wishes to use:

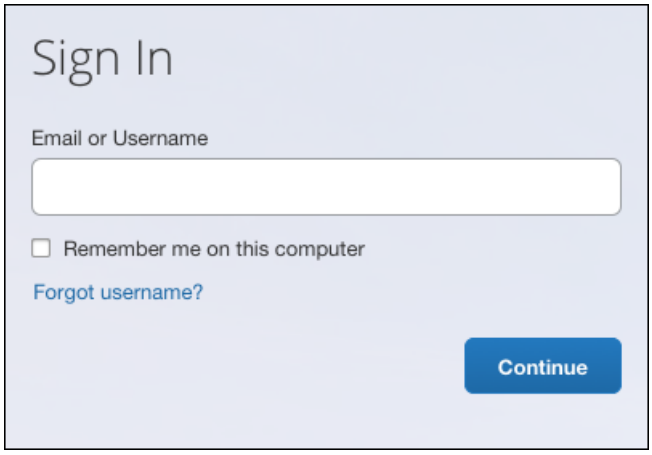
- **SSO Account**: If the user selects an account with SSO credentials, the user will enter an email, then the user will be directed to the IdP Single Sign-On portal. Once the user is authenticated, the SAP Concur **Home** page appears.
- **Username and Password**: The user is directed to an additional **Sign In** page to enter a password. The user then clicks **Sign In**. Once the user is authenticated, the SAP Concur **Home** page appears.

When all of the accounts have been added, a return user will select the account they want to use to log in to SAP Concur.

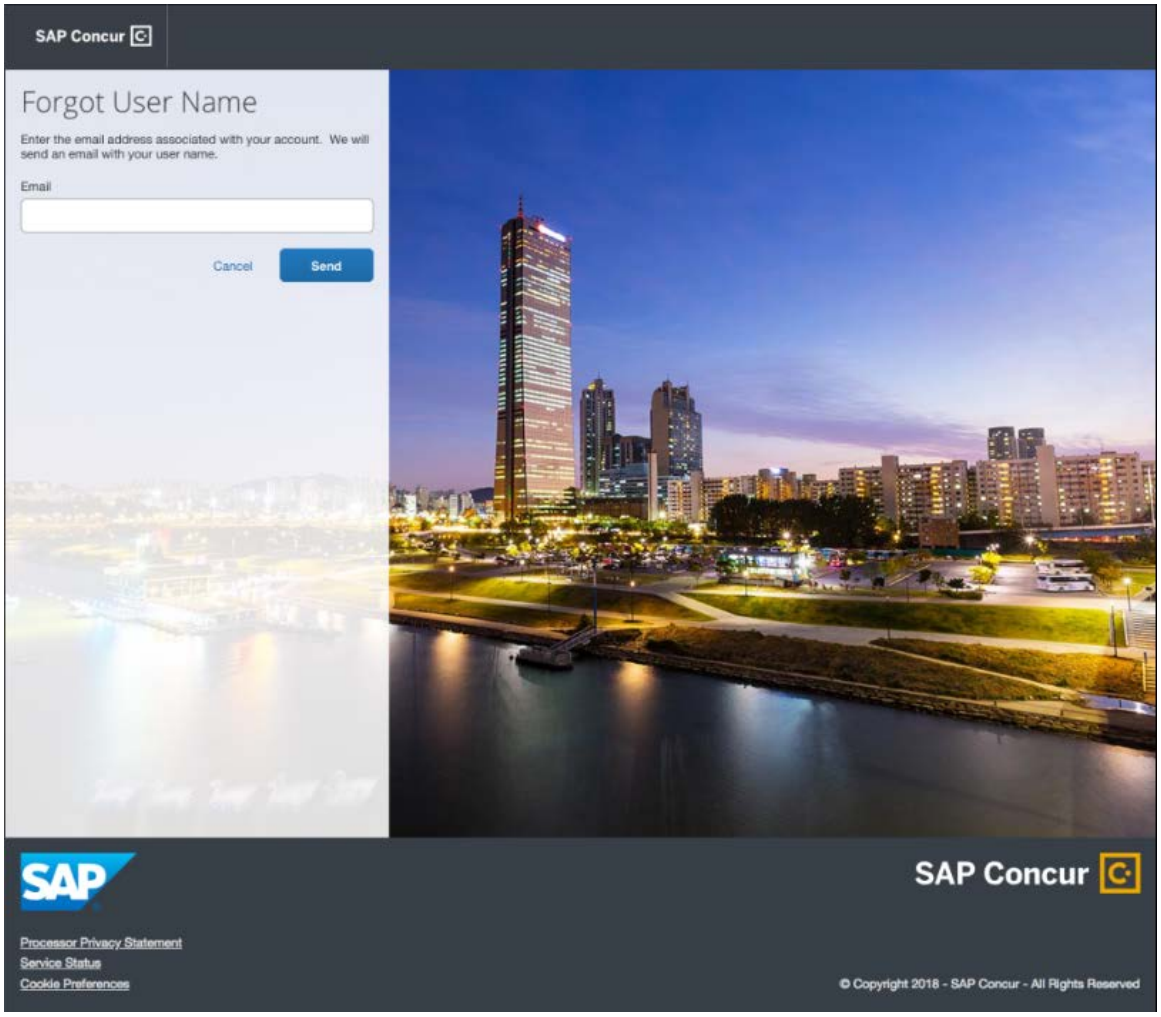


FORGOT USER NAME

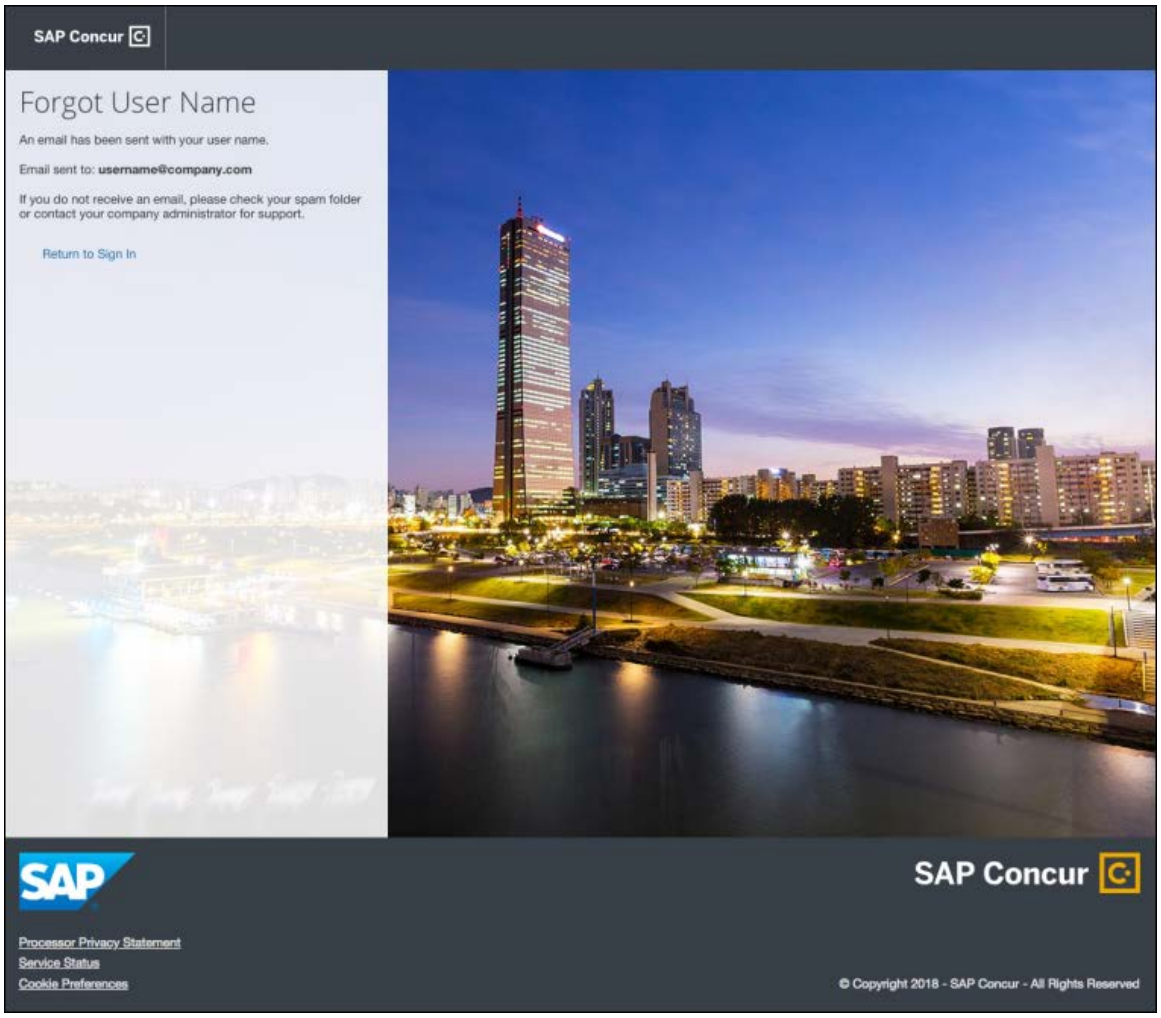
If a user forgets their user name, the user will click the **Forgot username?** link on the **Sign In** page.



Next, the **Forgot User Name** page appears. On the **Forgot User** Name page, the user will enter their email and click **Send** to have an email sent to a verified email account. The email will contain their user name.



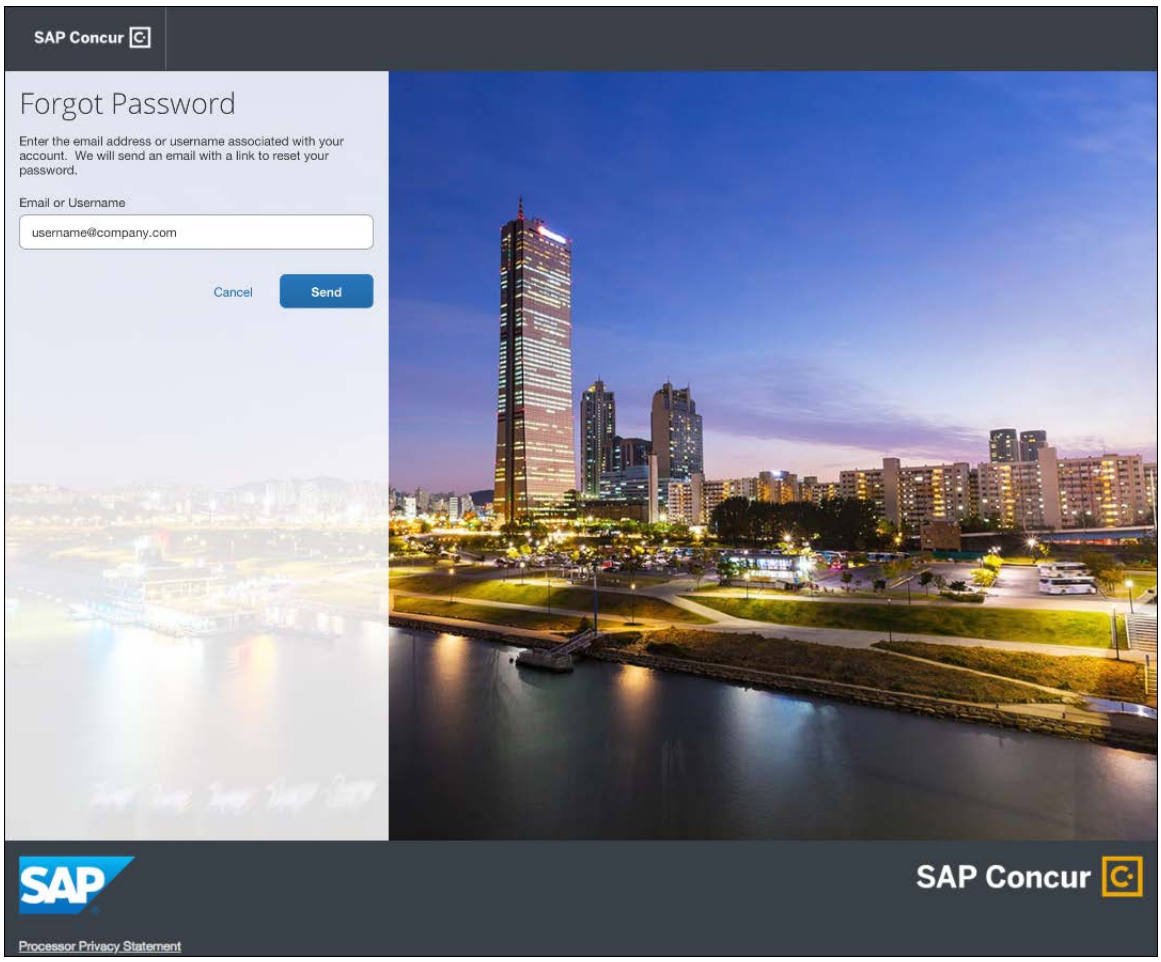
The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



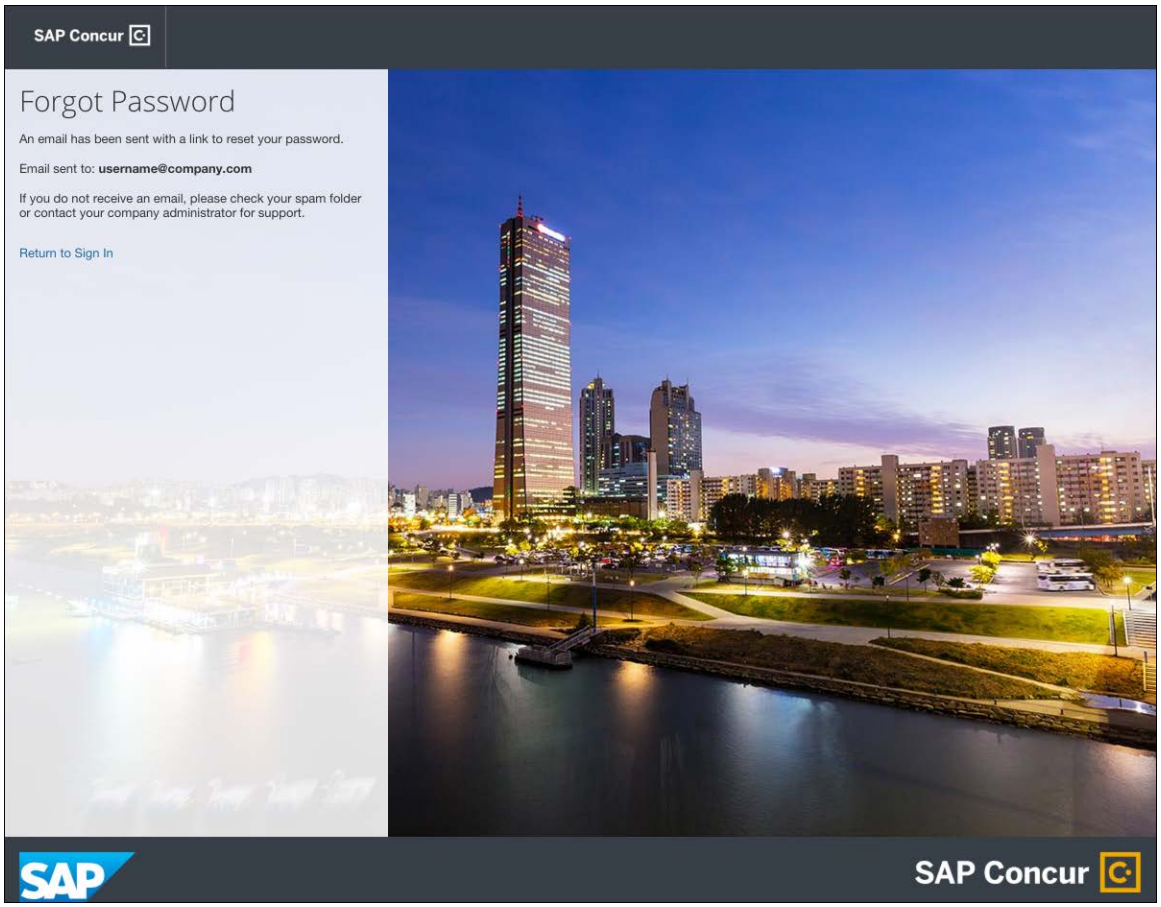
INVALID PASSWORD

If a user forgets their password, an on-screen message will appear alerting the user. The user will then click **Send** to have a password reset email sent to their verified email account.

SAP Concur compares the email address entered by the user to the email address in the user's SAP Concur profile. If the email addresses match, then SAP Concur generates a one-time sign-in token (link) that can be used for one hour.



The user will see an on-screen affirmation indicating that an email was sent to them. The user will click **Return to Sign In** page to return to the **Sign In** page.



Configuration / Feature Activation

Configuration information will be provided in a future release note.

File Transfer Authentication

Planned Changes Security Update to File Transfer Authentication

Overview

SAP Concur is planning to update an authentication setting for clients who transfer files to/from SAP Concur. The updated setting will lock a user account after five failed authentication attempts. Some accounts are already using this setting, and this change will update all accounts to use this setting. This authentication change does not impact the main SAP Concur application login, only the file transfer process.

Clients who are locked out of their account can contact SAP Concur support to unlock their account.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security for clients that access extract and import files.

Configuration / Feature Activation

This feature will be implemented automatically in a future release.

Miscellaneous

Planned Changes Archive Deactivated User Data

Overview

As SAP Concur continues to grow, steps must be taken to enhance and improve the performance of our system so that we can meet client expectations and the needs of their business.

Our overall goal is to significantly improve the performance of SAP Concur services by reducing the amount of data that is stored in our Production datastore. By reducing the data in the Production system, we can use server memory much more efficiently, which reduces processing time for transactions. For this reason, SAP Concur is developing an archive process for users who have been deactivated by their employers for *at least three years*. The archive process moves the deactivated user data from our Production datastore to a separate Reporting datastore.

NOTE: The Reporting datastore contains data that is not tied to active expense reports or travel itineraries. The information in the Reporting datastore is still available for reporting in Concur Intelligence, but it is not readily available from the SAP Concur application itself.

BUSINESS PURPOSE / CLIENT BENEFIT

Moving deactivated user data will provide faster processing time for transactions. In addition, it provides a more secure environment for the inactive users' personal information.

IMPORTANT!

We are currently piloting the process and evaluating the results. Our goal is to ensure that clients are not negatively affected, that we have considered all pertinent scenarios, and that the archiving process provides the desired results.

There is no targeted date for the implementation of this new process. We will announce the date via release notes well ahead of time.

Additional Information in Future Release Notes

This release note provides basic, general information about the process. Greater detail – for example, about reactivating an archived user, user imports, and admin functions – will be provided in future release notes.

What the User Sees

This change will provide faster processing times and greater stability of the system.

FAQ

Q. How often will SAP Concur archive deactivated user data?

> **A.** SAP Concur intends to archive deactivated user information on a reoccurring basis, similar to how we perform other system tuning tasks. Whether the archive process runs nightly, weekly, or on some other frequency will be adjusted to ensure that we obtain the benefits of the data archiving without impacting system performance.

Q. Which users will SAP Concur move to the Reporting datastore?

> **A.** SAP Concur's current policy will be to move – from Production to Reporting – the user profile information for any user who has had their access to SAP Concur services revoked by their employer – in other words – users that have been "marked inactive" in the SAP Concur system. A user must be deactivated for *over 3 years* without having been re-activated to be a candidate for archival.

Q. What impacts, if any, will I see in my Production system when a user is moved to the Reporting datastore?

> **A.** *For Professional Edition*, the most significant difference would occur in **Company Admin > User Administration**.
>
> However, once user information is archived:
>
> - From within User Administration, if the **Use Travel Advanced Filters** option is selected (enabled), the user will not be visible.
> - From within User Administration, if the **Use Expense Advanced Filters** option is selected (enabled), you will be able to see the user in search results as deactivated.
> - If you click the user's name, you will receive an error message: *The selected user exists in the Concur Expense or Concur Invoice application but the user contains conflicting or missing data. Contact Concur Client Support to request help in resolving this error.*
> - If you click the icon in the **Profile** column, you will receive the generic error message.

    - If you click the user's login ID, you will see no historical login information for that user.

- If another user has the Self-Assigning Assistant permission or the user is a Proxy, who can act on behalf of a user in an assigned group and searches for the archived user, the archived user will appear as inactive. If the other user tries to act on behalf of the archived user, the employee will receive a "switching user" error message.
- From within Concur Travel administration, the user will not be searchable from User Administration. For within Concur Expense or Concur Invoice administration, the user will still be visible when viewing inactive users. Concur Expense and Invoice administration source user data from the Concur Expense entity datastores, which are not currently subject to the SAP Concur Archival process.

For Standard Edition, locate users via **Administration > Expense Settings > Users** or **Administration > Travel Settings > Manage Users**, whichever applies.

Q. What do I do if an employee leaves my company for over three years, and then returns?

A. SAP Concur plans to provide a user interface that a company's User Administrator can use to reactivate the user.

- These users will not have access to any of their past travel history.
- For Concur Expense, the user would have access to their expense history if:
    - That history has not been removed by a Data Retention policy.
    - The HR Employee ID for the user is the same as when they were last active in the SAP Concur System.

If either of these circumstances do not apply, then the user would not have access to their previous expense reports or other Concur Expense data.

Q. Will Data Retention features work on archived users?

A. Yes. Regardless of where the user data is located – in the Production datastore or the Reporting datastore – user data will be obfuscated as per the requirements defined in the Data Retention feature.

Q. Once a user has been archived, is there any way to restore that user?

A. SAP Concur is looking into ways to help administrators re-activate their users without opening a support case.

Q. After a user's information has been archived, will we be able to view the user's expense reports and receipts online within Concur Expense?

A. Yes. Processors will be able to search for expense reports from archived users. They can search by Report ID or Employee Name and can view all

receipts from within Concur Expense once they have selected an expense report.

Please note that you will not be able to use the Proxy feature to see a former employee's expense report. You will see an error message should you attempt this.

Q. After a user's information has been archived, will an approver be able to see the archived user's expense reports that this approver approved in the past?

A. Yes, if an approver clicks **Approvals > Reports** and then clicks **View > All Reports you Approved**, then these expense reports will be visible. Approvers will be able to view the receipts for those expense reports.

Configuration / Feature Activation

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

Client Notifications

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

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

Browser Certifications

Monthly Browser Certifications and Supported Configurations

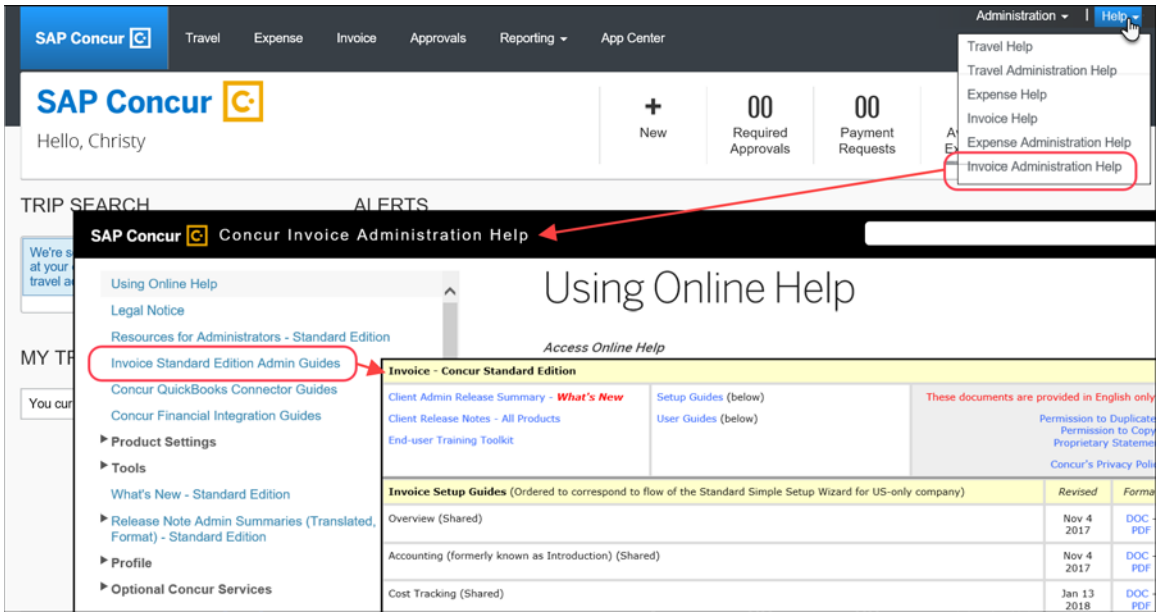
The *SAP Concur Release Notes – Monthly Browser Certifications* document lists current and planned browser certifications. The document is available with the other SAP Concur monthly release notes.

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

Additional Release Notes and Other Technical Documentation

Online Help – Admins

A user who is assigned an admin role can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through **Invoice Administration Help**.



SAP Concur Support Portal – Selected Users

Users who are assigned the correct SAP Concur support portal permissions can access release notes, setup guides, user guides, admin summaries, monthly browser certifications, supported configurations, and other resources through the SAP Concur support portal.

To access the SAP Concur support portal (for users with the correct permissions):

1. Click **Help > Contact Support**.
2. On the support page, click **Resources > Release/Tech Info**.