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

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Release Notes

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

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

Custom Fields

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

Overview

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

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

Administrator Experience

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

Configuration / Feature Activation

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

Expense Pay

Enhanced User Interface in Expense Payment Manager

Overview

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and **View Funding**, and **Batch Definitions** screens to provide easier access to relevant information and to remove outdated elements from the user interface.

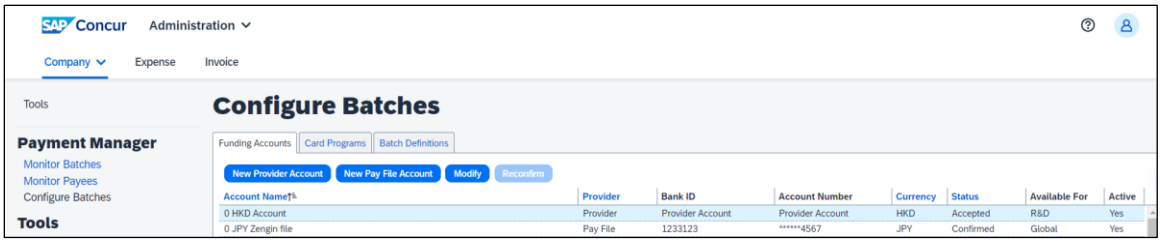
This update provides faster access to relevant information on screen in a simplified manner and reduces the number of clicks required to view the necessary information.

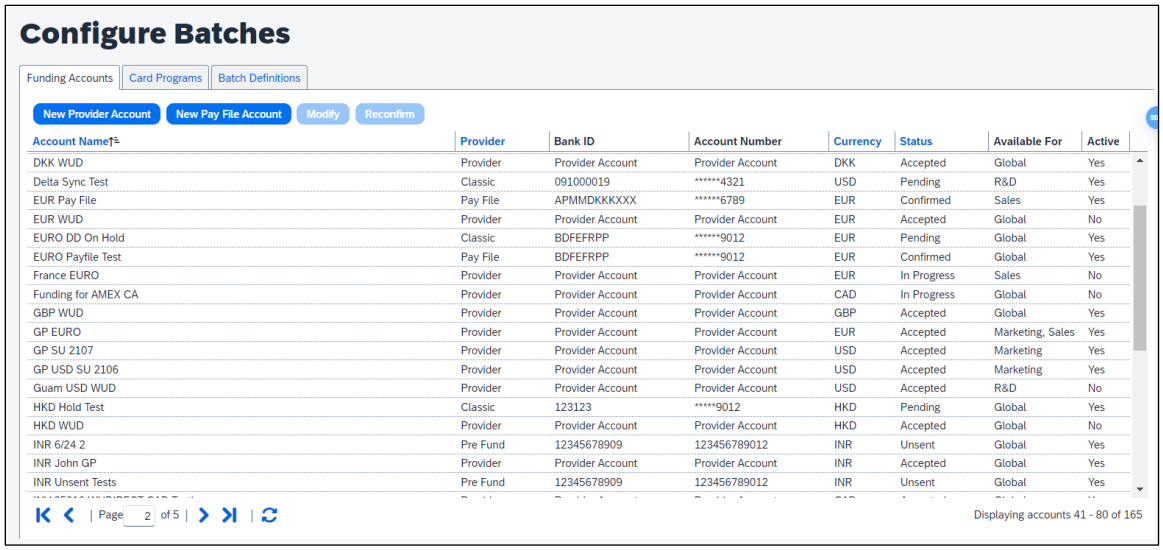
Administrator Experience

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

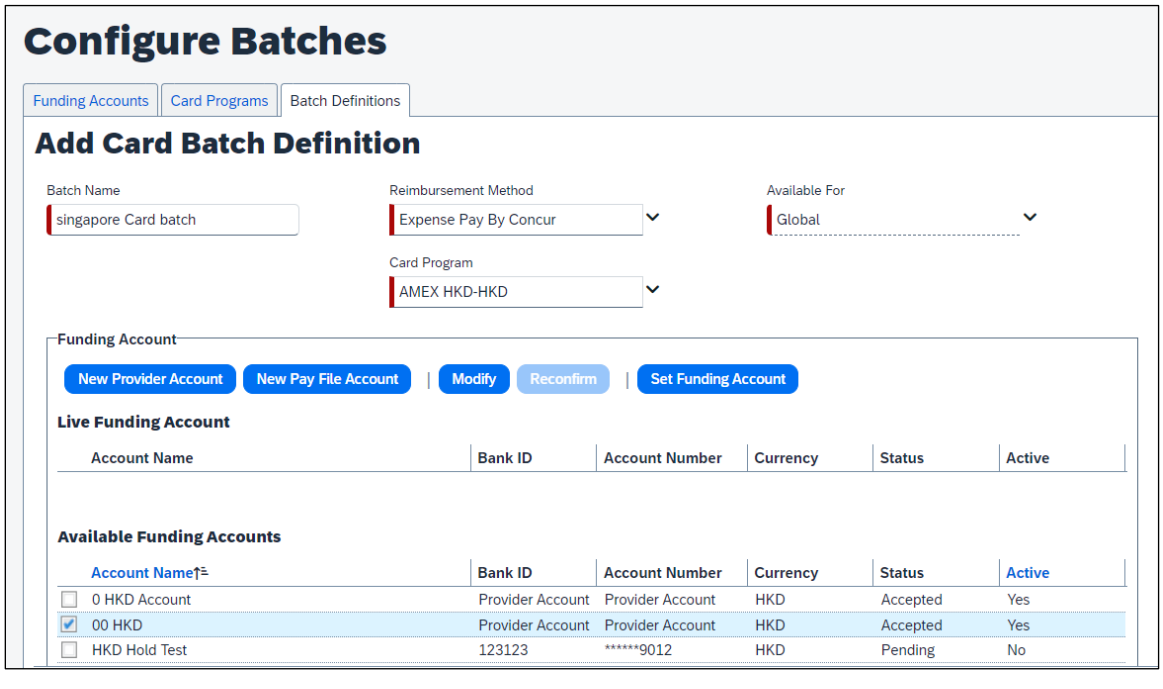
- The **Bank ID** column displays the term **Provider Account** instead of **Global Account** when using Convera as the payment provider.
- The **Account Number** column is populated with the term **Provider Account**. In the future, this will be used to display the provider account ID you setup with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

Example:





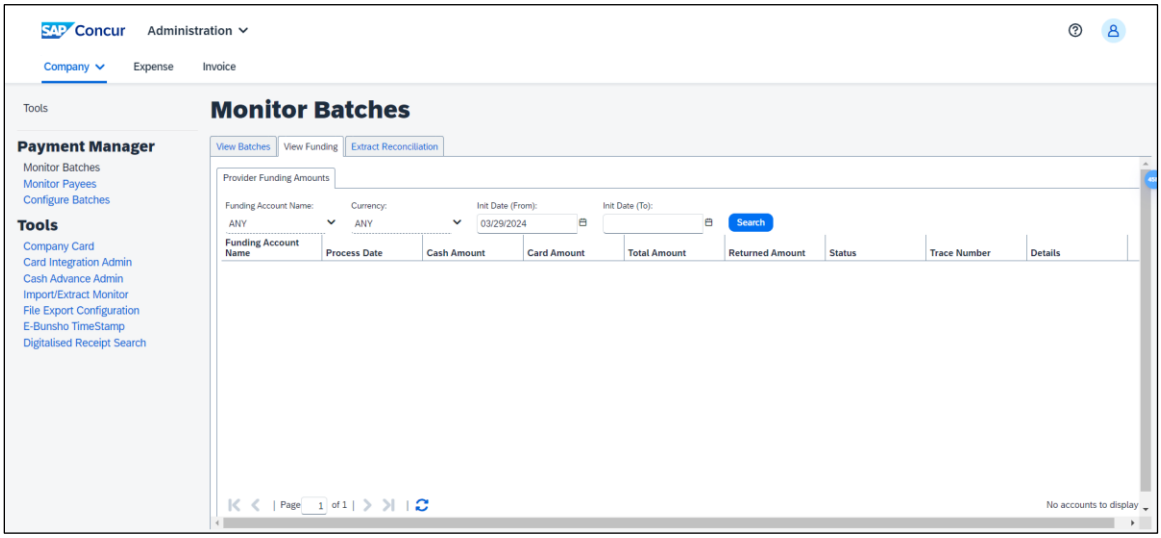
When you add a new card batch in the **Batch Defnitions** screen, selecting or changing the card program automatically displays a filtered list of funding accounts based on the currency used for the card program.



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

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

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



Configuration / Feature Activation

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

Updates to the Payment Status Timeline

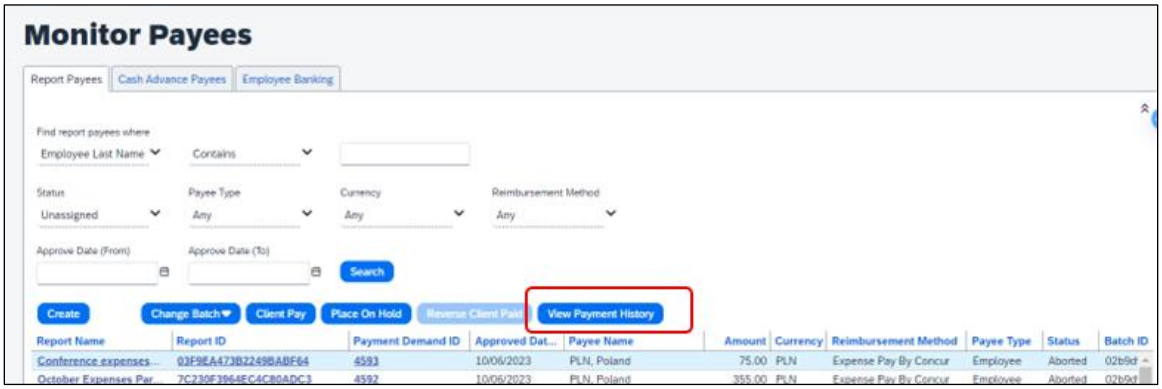
Overview

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

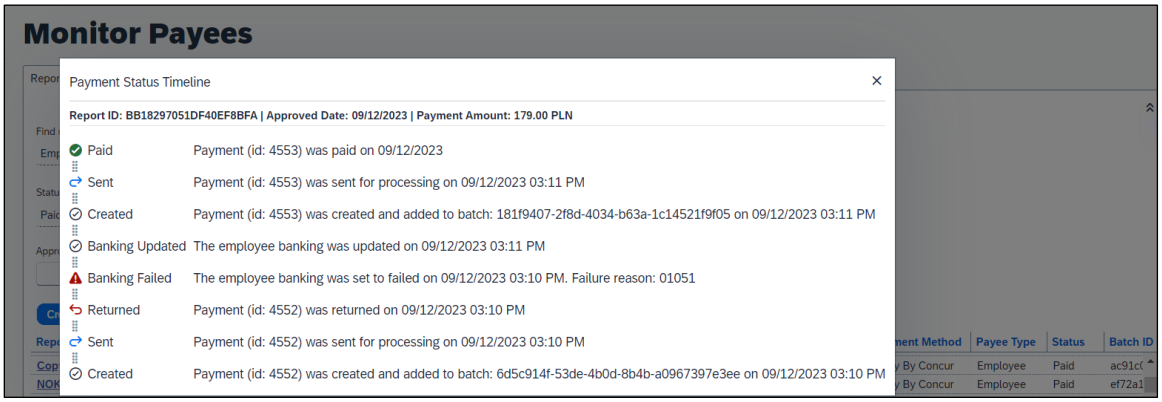
This update helps provide more meaningful information to the administrator when tracking a payment and help answering employee inquiries about their payments. It also provides faster access to more relevant information in a centralized and simplified display.

Administrator Experience

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



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



Configuration / Feature Activation

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

Localization

Removal of Expense Types Descriptions

Overview

As of April 12th, 2024, SAP Concur has deprecated the descriptions for expense types. Currently, there is no possibility to set the descriptions for expense types in

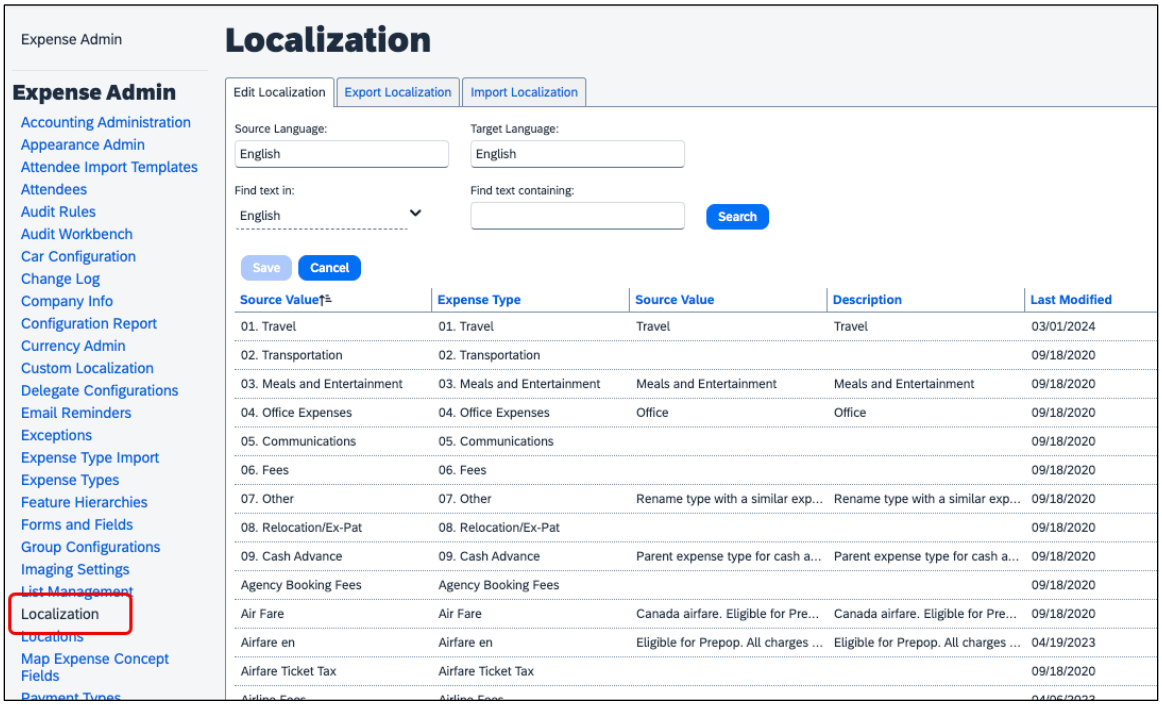
the Concur user interface or APIs, but these descriptions do display in the **Localization** tab in Concur Expense settings.

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

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

Administrator Experience

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



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

Configuration / Feature Activation

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

Mileage Service

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

Overview

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

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

Configuration / Feature Activation

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

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

Miscellaneous

Keyboard Shortcuts for Expense Screens

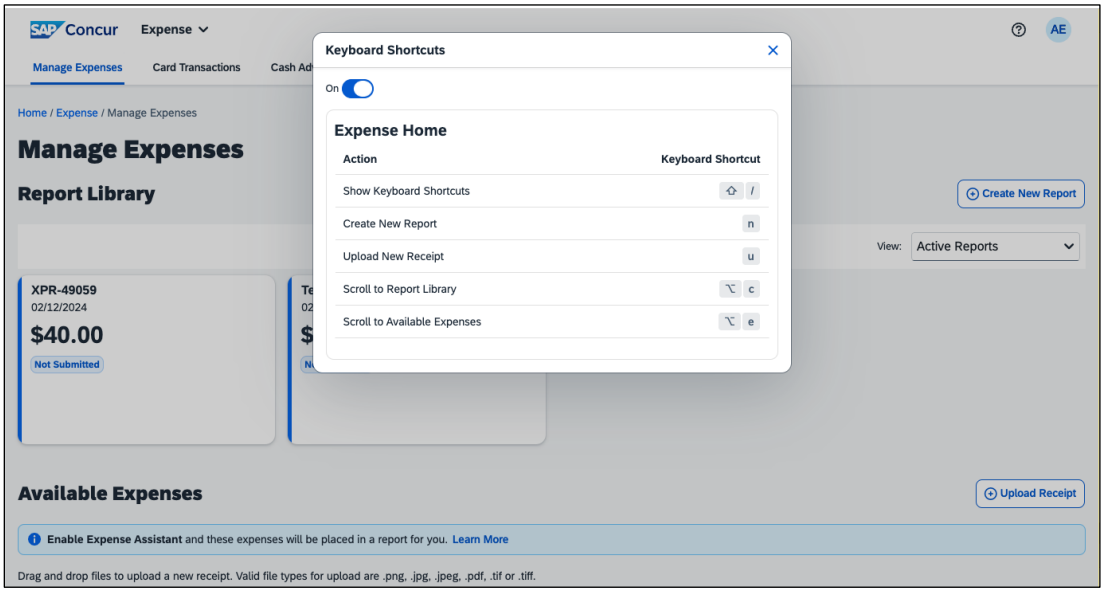
Overview

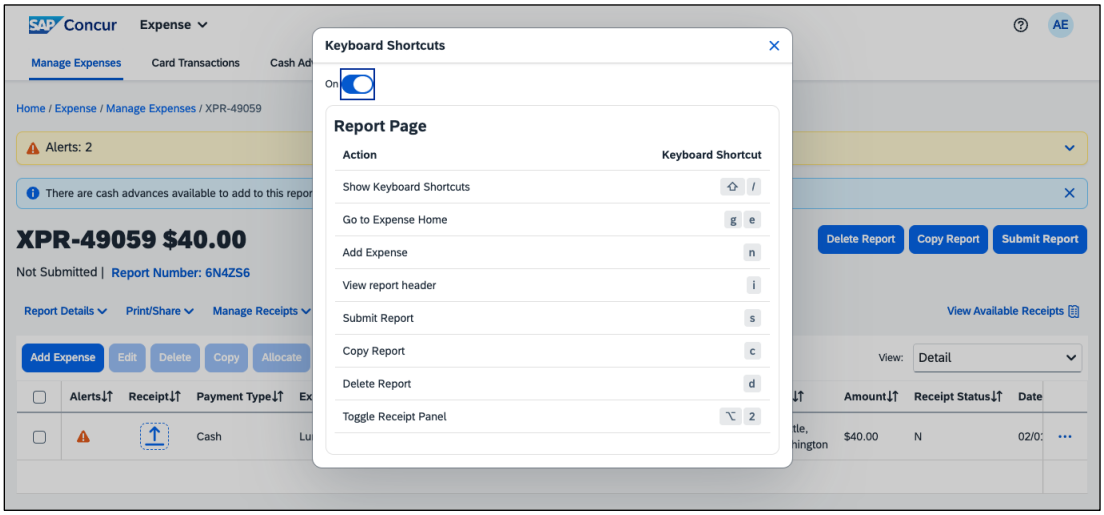
SAP Concur has enabled convenient keyboard shortcuts in selective Concur Expense screens such as **Expense Home**, **Report Page**, and **Expense Entry Page**. This update offers users a more convenient way to navigate the expense application faster, ultimately improving productivity, efficiency, and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

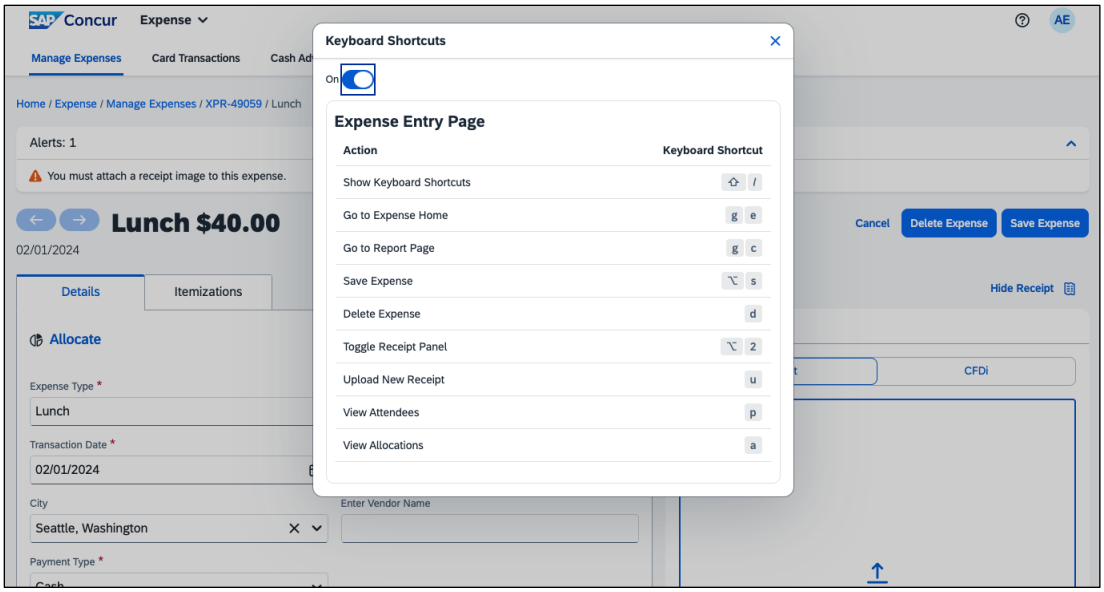
NOTE: This feature will currently be available in English only.

End-User Experience

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







Configuration / Feature Activation

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

Travel Allowance

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

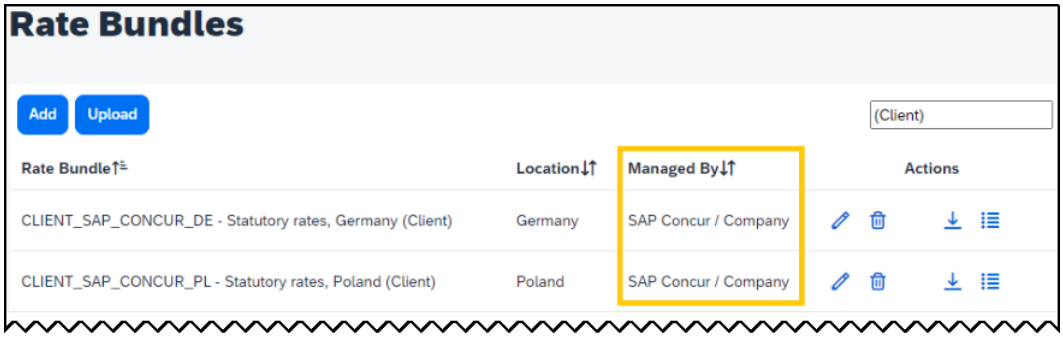
Overview

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

Create a New Rate Bundle from a Statutory Base Rate Bundle

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

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

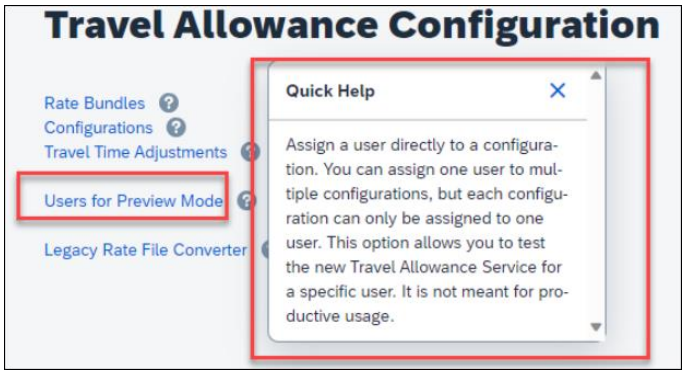


Note that, once created, the new rate bundle will display under **Managed By** as *SAP Concur / Company*.

Enhanced Preview Mode for Travel Allowance Service

In October of 2023 the *Users for Preview Mode* feature was released. This feature allows the Legacy client without access to a Production Sandbox environment to test

the Travel Allowance Service (TAS) prior to transition. This is done by selecting the **Users for Preview Mode** option in **Travel Allowance Configuration**.



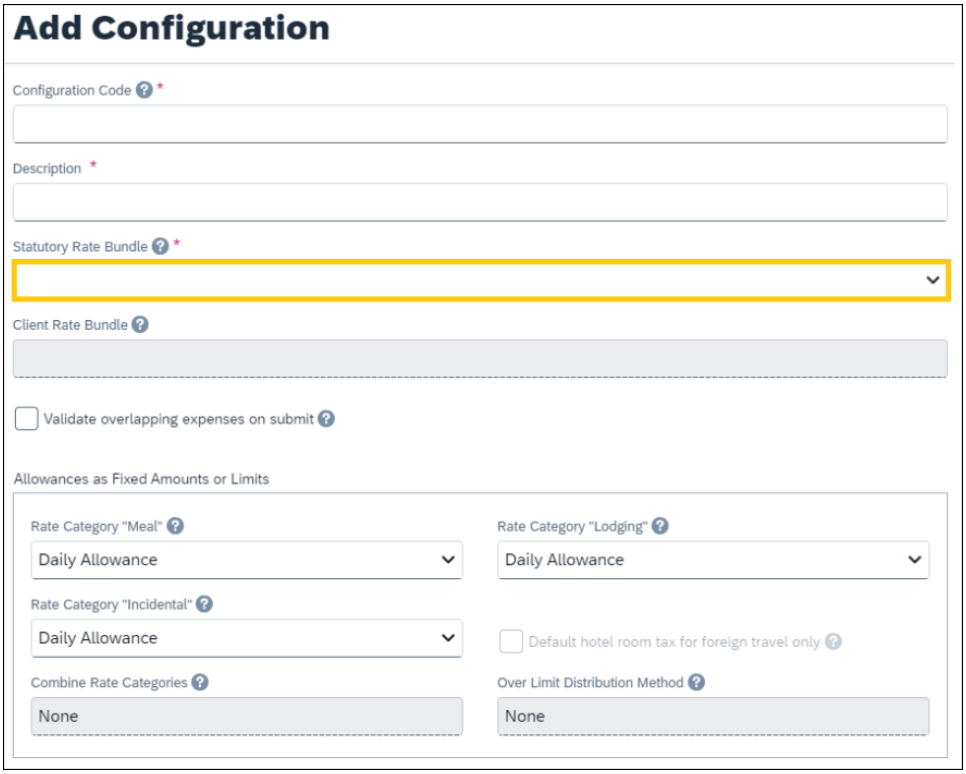
With the March 2024 release, several updates were made available to this feature:

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

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

When adding the new configuration, the administrator may update only a restricted set of fields and may select only those rate bundles that are

marked under **Managed By** as *SAP Concur / Company*.



Configuration / Feature Activation

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

Planned Changes

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

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

Company Card

Planned Changes Enhancements to the Manage Transactions Screen

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

Overview

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

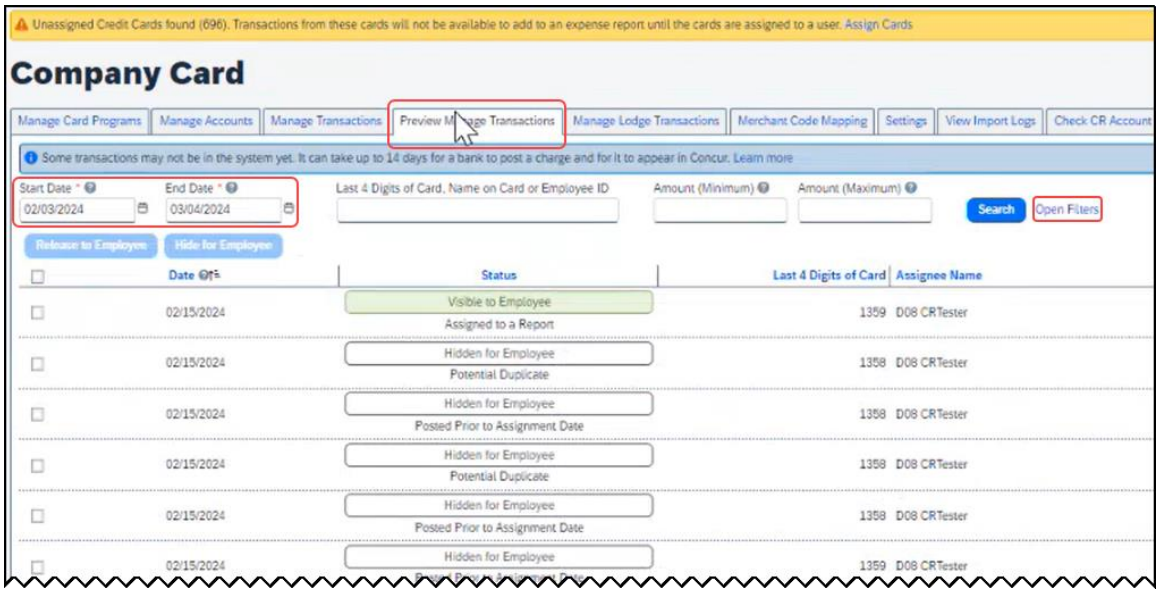
NOTE: More feature information will be available in an upcoming release note.

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

Administrator Experience

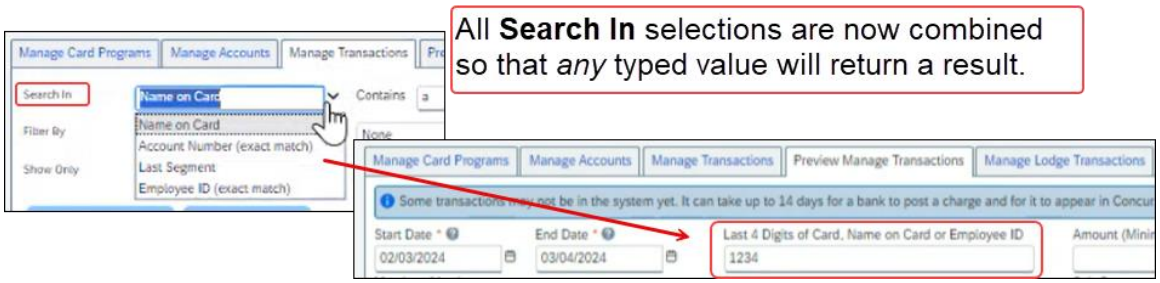
The Company Card administrator will see the simple search format of employee transactions of the previous 30 days. Transactions that are both hidden and visible to

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

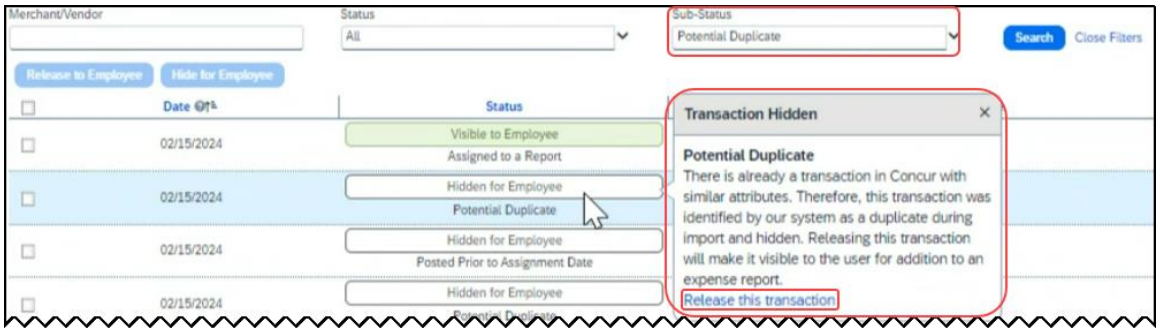


From this simple format, the administrator clicks **Open Filters** to refine the search:

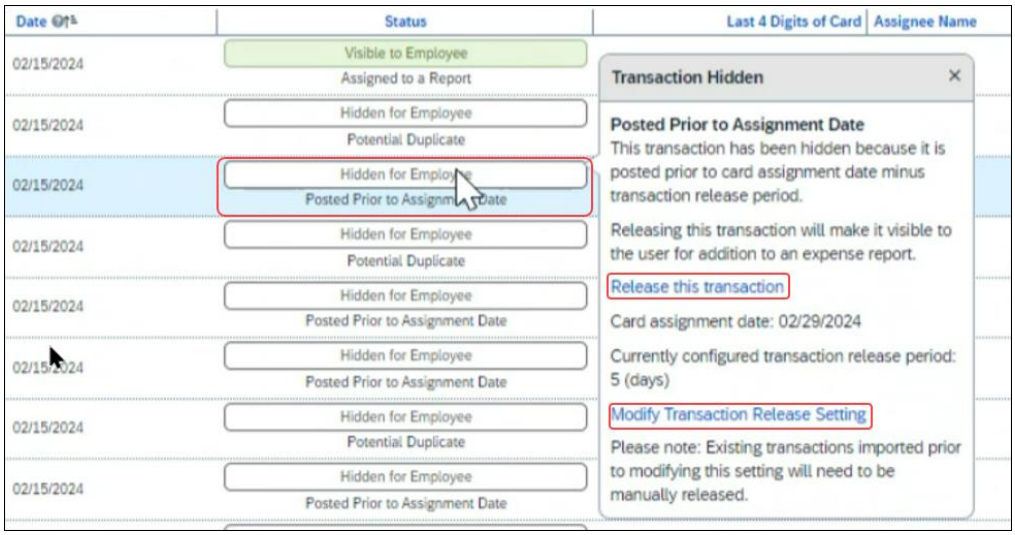
The **Last 4 Digits...** search now combines the logic for *all* the potential typed values:



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



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



Moving Between the Two Manage Transactions Windows

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

Configuration / Feature Activation

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

Receipts – ExpenseIt for Web

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

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

Overview

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

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

DEFAULT BEHAVIOR FOR NEW AND EXISTING USERS

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

Configuration / Feature Activation

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

Reports

Planned Changes Enhancements to the Report Timeline

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

Overview

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

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

PHASES

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

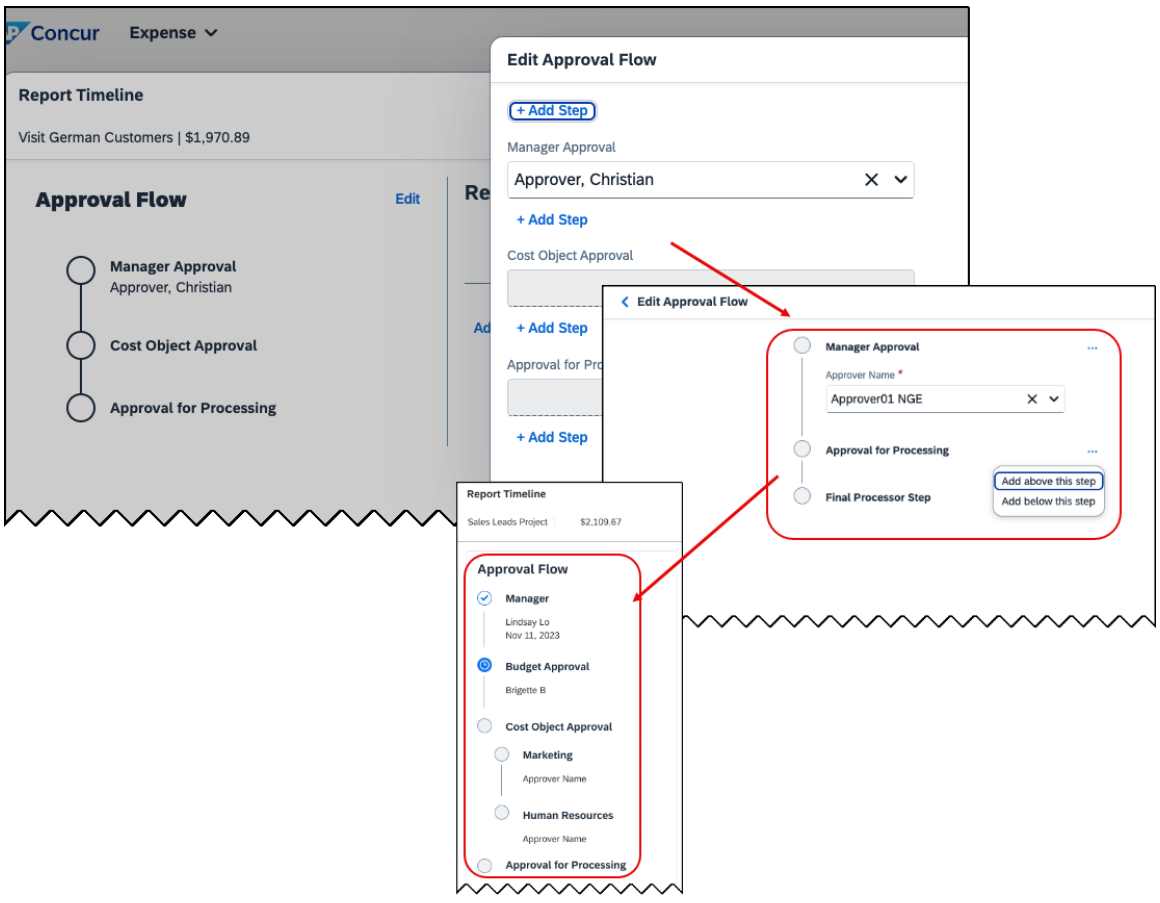
Phase	Date of Release
Phase 1: All customer test entities	April 16, 2024
Phase 2: All production entities	April 23, 2024

End-User Experience

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

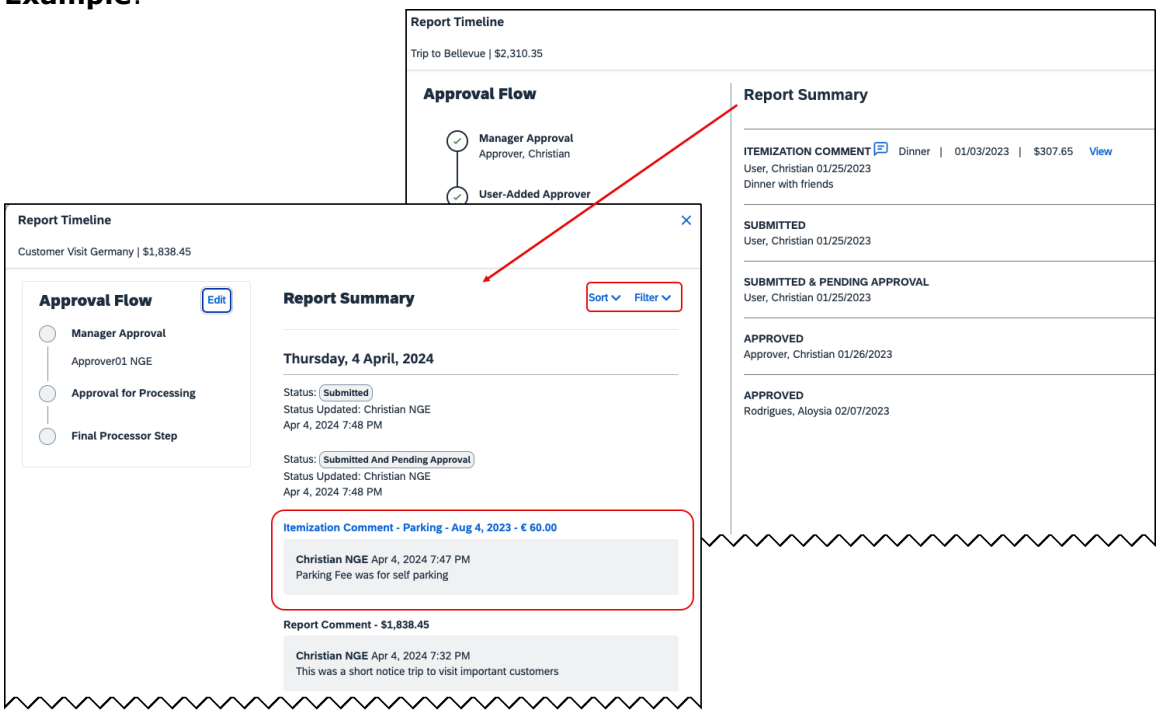
In the **Approval Workflow** section, the UI will be improved to display updated icons, approver names along with time and date of approval.

Example:



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

Example:



Configuration / Feature Activation

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

Planned Changes Preferred Name for Expense Submitter

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

Overview

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

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

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

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

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

End-User Experience

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

Configuration / Feature Activation

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

User Interface Changes

Planned Changes Update to the Report Status Indicator

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

Overview

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

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

End-User Experience

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

Configuration / Feature Activation

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

Client Notifications

Accessibility

Accessibility Updates

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

Gender Diversity

Gender Diversity Planned Features and Changes

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

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

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

In-Product User Assistance

Client Customized Content

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

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

Subprocessors

SAP Concur Non-Affiliated Subprocessors

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

To access the SAP Concur Sub-processors List:

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

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

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

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

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

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

Supported Browsers

Supported Browsers and Changes to Support

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

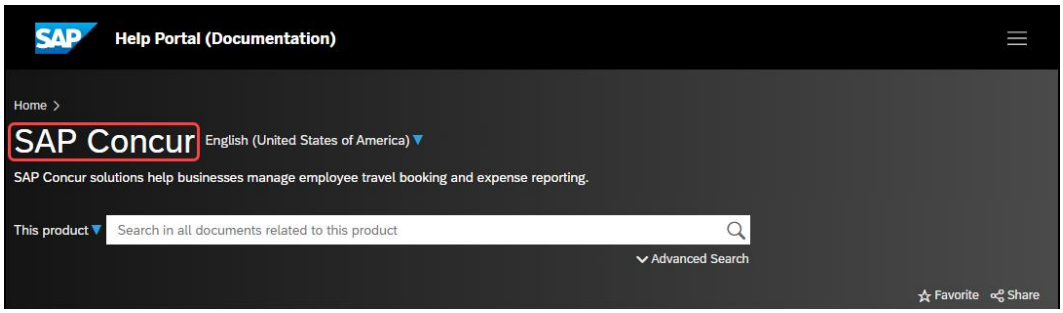
When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes*.

Additional Release Notes and Other Technical Documentation

Online Help

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

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



SAP Concur Support Portal – Selected Users

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

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

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

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

Cases

Check Support Case Status

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

To check the status of a submitted case

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

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

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

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