SAP Concur Release Notes **Invoice Professional/Premium** Includes: Concur Invoice, Capture Processing, Invoice Pay, Purchase Requests and Purchase Orders	
Month	**Audience**
Release Date: January 12, 2019 Update #1: Friday, January 14, 1:00 PM PST	SAP Concur Client FINAL

Contents

Release Notes 2

Concur Invoice 2

Reminder New User Interface for Concur Invoice Available for Client Review and Opt-In 2

File Transfer Authentication 3

Security Update to File Transfer Authentication 3

SAP Concur Email 4

Ongoing Email Infrastructure Change - Add IP Addresses to Safe Senders List 4

Ongoing Updated Email Format 5

Planned Changes 7

Concur Invoice 7

Planned Changes New User Interface for Concur Invoice Targeted for March Release 7

Planned Changes Payment Request(s) Renamed to Invoice(s) 9

Invoice E-Bunsho Timestamp 10

Planned Changes Updated Invoice E-Bunsho Timestamp Icon 10

Purchase Order 10

Planned Changes Import Now for PO and PO Receipt Imports 10

Vendor Management 11

Planned Changes Audit Trail for Vendor Changes 11

Planned Changes Create and Approve Vendors Available in Test Environments 13

Planned Changes Support for Multi-Level Connected Lists With Create and Approve Vendor 14

Budget 14

Planned Changes Workflows for Budget 14

Company Administration **15**
Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur15
Training Administration **16**
Planned Changes Optimizing and Relocating the Page 16
Test User Admin **16**
Planned Changes Retiring the Purge Test User Transactions Functionality 16
SAP Concur **17**
Planned Changes New SAP Concur Sign In Page 17
Miscellaneous **27**
Planned Changes Archive Deactivated User Data 27

Client Notifications **31**
Subprocessors **31**
SAP Concur Non-Affiliated Subprocessors 31
Browser Certifications **31**
Monthly Browser Certifications and Supported Configurations 31

SAP Concur Support Case Status **32**
Check Support Case Status **32**
January Example 33

Additional Release Notes and Other Technical Documentation **34**
Online Help – Admins **34**
SAP Concur Support Portal – Selected Users **35**

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Release Notes

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

Concur Invoice

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.

File Transfer Authentication

Security Update to File Transfer Authentication

Overview

SAP Concur will update an authentication setting for clients who transfer files to/from SAP Concur, targeting January 16, 2019. The updated setting will lock out user accounts after five failed authentication attempts. Some accounts are already using this setting. This change will update *all* accounts to this setting.

This authentication change does not impact the main SAP Concur application login, only the file transfer process is affected.

The affected URLs are:

- st.concursolutions.com
- st-eu.concursolutions.com
- st-cge.concursolutions.com

Clients who have been locked out of their accounts can contact SAP Concur support to unlock their accounts.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides better security for clients when accessing extract and import files.

Configuration / Feature Activation

This change will be implemented automatically.

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 services to SAP Concur users. Because of this, companies that filter inbound email based on the sending IP address *must* add new IP addresses to their Safe Senders list to ensure that their users receive email from SAP Concur.

IMPORTANT: All Services Will Soon Be Affected

Initially, the issue described here affected only companies that use Concur Expense. Starting in January, email from other SAP Concur services (such as Concur Travel and Concur Pay) will move to the new email infrastructure.

We will continue to add other services throughout the first quarter of 2019. Please monitor the release notes for more information about the timing of the additional changes.

NOTE: This change affects only companies that filter incoming email based on IP addresses.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If your company uses Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure that all required IP address Safe Senders lists are updated so that your users continue to receive SAP Concur email without interruption.

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, 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 that all product emails will 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 to the project. Expect that the changes may 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 Targeted for March Release

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.

NOTE: Contact your SAP Concur representative for more information about the Early Access program.

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 the SAP Concur 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 the SAP Concur 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.

NOTE: This term change is targeted for the March release.

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.

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 need to 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 Changes 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 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.

Planned Changes Support for Multi-Level Connected Lists With Create and Approve Vendor

Overview

In a future release, on entities with the Create and Approve Vendors feature enabled, the vendor information form will support the use of multi-level connected lists.

NOTE: The Create and Approve Vendors feature is enabled by default on standard entities and disabled by default on professional entities.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature will enable the Invoice Configuration Administrator to customize the vendor information form with multi-level list fields.

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. The flexible workflow feature for Budget that SAP Concur offers 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 that more important (to the organization) spending will be declined because lesser 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 needs to configure this feature on the **Workflows** page by clicking **Administration** > **Invoice** or **Expense**.

Company Administration

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.

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. SSO is currently supported for Concur Expense, Concur Invoice, Concur Request, and Concur Travel.

Other SAP Concur products and services are outside the scope of this initial release.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Administration > Company > Company Admin** page.

NOTE: This new feature does not affect Concur Travel clients who are already using the Security Keys feature.

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 coming in a future release note.

Training Administration

Planned Changes Optimizing and Relocating the Page

Overview

To simplify the **Training Administration** page, the functionality and content will be changing.

In addition to content changes, access to the **Training Administration** page will move from **Company Admin** to **Tools**.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes will make the Training Administration feature easier to find and use.

Configuration / Feature Activation

The changes will be automatically available; additional information about potential configuration or activation steps will be provided in a later version of these release notes.

📖 For general information about the Training Administration feature, refer to the *Shared: Training Administration Setup Guide*.

Test User Admin

Planned Changes Retiring the Purge Test User Transactions Functionality

Overview

SAP Concur is retiring the functionality in the Test User Admin feature that removes the transactions of test users from Concur Expense, Concur Invoice, Concur Travel, and Concur Request.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will allow SAP Concur to devote more resources to development and maintenance of features that are used by many or most of our clients.

What the Admin Sees

The **Test User Admin** page will no longer display the **Purge Test User Transactions** button.

Before

NOTE: To access the page, click **Administration > Expense** (or **Invoice** or **Requests**) **> Test User Admin**.

After

Configuration / Feature Activation

The functionality will automatically be removed.

For general information about the Test User Admin feature, refer to the *Shared: Test User Setup Guide*.

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 this "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 inactive user's 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 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. The current policy of SAP Concur move to the Reporting datastore?

A. The current policy of SAP Concur 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 – they 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 chosen, the user will not be visible.
- From within User Administration, if the **Use Expense Advanced Filters** option is chosen, 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 SAP Concur 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 an "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.

SAP Concur Support Case Status

This release might resolve previously submitted support cases. You can check the status of a support case to confirm whether the case issue has been resolved.

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**.

The SAP Concur support page displays.

NOTE: If the **Contact Support** option is not available in the Help menu, then your company has chosen to support the SAP Concur system internally. Please contact your internal support desk for assistance.

3. In the **Quick Search** field, enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

January Example

The table below contains some example cases that are resolved in this release. It is not a comprehensive list of the resolved cases.

Case ID	Description
13010733 12996888	**Invoice Processor** Processors are unable to approve invoices with cost object approval due to missing **Approve** button.
12955254	**Concur Invoice** The Unit Price on the line item level returns to zero if there are more than four digits on it while adding line items and moving to a different tab.
12371248	**Audit Rules** When the Processor modifies the header, the audit rule check *Amount Remaining to be itemized* is not fired.
12605645	**Capture Processing** Invoice Capture with VAT amount 1 - 4 triggers audit rule error that prevents auto submit.

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**.

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SAP Concur Release Notes **Invoice Professional/Premium** Includes: Concur Invoice, Capture Processing, Invoice Pay, Purchase Requests and Purchase Orders	
Month	**Audience**
Release Date: February 9, 2019 Update #3: Friday, February 22, 2:30 PM PST	SAP Concur Client FINAL

Contents

Release Notes **2**

Concur Invoice **2**

Menu Changes to Invoice Pay and Invoice Capture Features 2

Reminder New User Interface for Concur Invoice Accounts Payable Available for Client Review and Opt-In 3

Invoice Pay **4**

New Provider Payment Manager Feature 4

Invoice Capture **6**

Verification Page Changes for Large Documents 6

Vendor Management **6**

Audit Trail for Vendor Changes (Released February 22) 6

Create and Approve Vendors Feature Available in Test Environments (Released February 22) 8

Support for Multi-Level Connected Lists With Create and Approve Vendors Feature (Released January 29) 8

Invoice E-Bunsho Timestamp **9**

Updated Invoice E-Bunsho Timestamp Icon 9

Company Administration **9**

New SSL Certificate for concursolutions.com 9

SAP Concur Email **10**

Ongoing Email Infrastructure Change - Add IP Addresses to Safe Senders List 10

Ongoing Updated Email Format 11

SAP Concur Support Portal **13**

Security Questions Available When Using the SAP Concur Support Portal 13

Miscellaneous **16**

Reminder: No Personal or Sensitive Data in Custom Fields 16

Planned Changes 17

Concur Invoice 17

Planned Changes New User Interface for Concur Invoice Targeted for April Release 17

Planned Changes Payment Request(s) Renamed to Invoice(s) 20

Purchase Order 20

Planned Changes Import Now for PO and PO Receipt Imports 20

Budget 21

Planned Changes Workflows for Budget 21

Company Administration 22

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur 22

Planned Changes New SAP Concur Sign In Page 23

Training Administration 33

Planned Changes Optimizing and Relocating the Page 33

Test User Admin 34

Planned Changes Retiring the Purge Test User Transactions Functionality 34

Miscellaneous 35

Planned Changes Archive Deactivated User Data 35

Client Notifications 36

Subprocessors 36

SAP Concur Non-Affiliated Subprocessors 36

Browser Certifications 36

Monthly Browser Certifications and Supported Configurations 36

SAP Concur Support Case Status 37

Check Support Case Status 37

February Example 38

Additional Release Notes and Other Technical Documentation 39

Online Help – Admins 39

SAP Concur Support Portal – Selected Users 40

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Release Notes

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

Concur Invoice

Menu Changes to Invoice Pay and Invoice Capture Features

Overview

Several design changes have been implemented in Concur Invoice. The **Services** menu has been removed, a new menu named **Payments** has been added, and the **Invoice Capture** and **Payment Manager** options have been moved to new locations.

NOTE: The **Invoice Capture** option is only available to clients with the Invoice Capture feature enabled. The **Payments** menu is only available to users with the Invoice Payment Manager role.

BUSINESS PURPOSE / CLIENT BENEFIT

This enhancement makes it easier for clients to navigate to the Invoice Capture, Payment Manager, and Provider Payment Manager features.

What the User sees

Users with access to the Invoice Capture feature will see the **Invoice Capture** option immediately after clicking **Invoice**.

Before

After

Users with the Invoice Payment Manager role will see a new menu named **Payments** and will see the **Payment Manager** and the **Provider Payment Manager** options in the **Payments** menu.

Before

After

Configuration / Feature Activation

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

Reminder New User Interface for Concur Invoice Accounts Payable 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 second quarter in 2019.

NOTE: For clients reviewing this feature, SAP Concur has now added an **Unapproved Vendor** link in the **Back Office** section of the **Invoice Manager** page. More information is available in the referenced fact sheet at the end of this release note.

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 *Concur Invoice Accounts Payable User Experience Enhancement Client Fact Sheet* and the ***Planned Changes** New User Interface for Concur Invoice Soon Available* release note in this document.

Invoice Pay

New Provider Payment Manager Feature

Overview

With the February release, Invoice Pay clients who have signed up with a payment provider on the App Center will be able to use the new Provider Payment Manager feature.

The Provider Payment Manager feature offers clients, who use external payment providers, the option to view details and status of their payments in SAP Concur without having to log into their providers' systems.

NOTE: Clients must have the Invoice Payment Manager role to use this feature.

NOTE: Clients must also have a contract with a payment provider on the App Center, which is a purchased service.

BUSINESS PURPOSE / CLIENT BENEFIT

The Provider Payment Manager feature makes it easier for clients to keep track of their payments when their payments are processed by a third-party payment provider.

What the Payment Manager Sees

The user with the Invoice Payment Manager role will see a new menu, **Payments**, with a new option, **Provider Payment Manager**.

When the user selects the **Provider Payment Manager** option, they will see a new page, **Provider Payment Summary**.

Configuration / Feature Activation

To use the Provider Payment Manager feature, clients must sign up with a payment provider on the App Center.

📖 For more information, refer to the *Invoice: Invoice Pay User Guide* and the *Invoice: Payment Confirmation Extract Specification*.

Invoice Capture

Verification Page Changes for Large Documents

Overview

In previous releases of Invoice Capture, when uploaded batches containing documents with more than 500 pages were viewed on the Invoice Capture **Verification** page, clients could view every page in each document.

Beginning in this release, if a document has more than 500 pages, the first page will be displayed on the **Verification** page. To view all pages in a document, you can download the document in PDF format.

BUSINESS PURPOSE / CLIENT BENEFIT

This change improves the performance of the **Verification** page.

Configuration / Feature Activation

This change is automatically available.

Vendor Management

Audit Trail for Vendor Changes (Released February 22)

Overview

Clients with the Create and Approve Vendors feature enabled can now 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 appear on the **Audit Trail** page.

NOTE: The Create and Approve Vendors feature is *disabled* by default on Professional entities.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables 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 **View Audit Trail**, the audit trail page for the selected vendor appears.

The audit trail can be downloaded to a comma-separated (.csv) file by clicking the **Download Audit Trail** link. The file is downloaded to the default download location on the local machine.

Configuration / Feature Activation

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

📖 For more information about the Create and Approve Vendors feature, refer to the *Invoice: Vendor Manager User Guide*.

Create and Approve Vendors Feature Available in Test Environments (Released February 22)

Overview

The Create and Approve Vendors feature is now 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.

Support for Multi-Level Connected Lists With Create and Approve Vendors Feature (Released January 29)

Overview

On entities with the Create and Approve Vendors feature enabled, the vendor information form now supports the use of multi-level, connected lists.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature enables the Invoice Configuration Administrator to customize the vendor information form with multi-level list fields.

Configuration / Feature Activation

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

📖 For more information, refer to the *Invoice: Vendor Manager User Guide*, the *Invoice: Forms and Fields Setup Guide*, and the *Shared: List Management Setup Guide*.

Invoice E-Bunsho Timestamp

Updated Invoice E-Bunsho Timestamp Icon

Overview

The icon for the Invoice e-Bunsho Timestamp feature has been 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 > Manage Requests > 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.

Company Administration

New SSL Certificate for concursolutions.com

Overview

In an effort to ensure the ongoing security of our products and services, SAP Concur has issued a new concursolutions.com SSL certificate. ***The current certificate will expire on March 16, 2019.***

Any client who has pinned this expiring certificate will need to update to the new certificate prior to March 16, 2019. If the pinned certificate is not updated prior to March 16, 2019, the client's organization and users will experience disruption to SAP Concur products and services.

Clients who have not pinned the certificate do not need to take any action as the new certificate is updated automatically. Most clients do not pin the certificate.

Please be aware: As an enhancement to our Security and Compliance program, this certificate will be updated on an annual basis.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides ongoing security for our products and services.

Configuration / Feature Activation

The new SSL certificate can be downloaded here:
http://assets.concur.com/concurtraining/cte/en-us/concursolutions.cert.pem

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 services to SAP Concur users. Because of this, companies that filter inbound email based on the sending IP address *must* add new IP addresses to their Safe Senders list to ensure that their users receive email from SAP Concur.

IMPORTANT: All Services Will Soon Be Affected

Initially, the issue described here affected only companies that use Concur Expense. Starting in January, email from other SAP Concur services (such as Concur Travel and Concur Pay) will move to the new email infrastructure.

We will continue to add other services throughout the first quarter of 2019. Please monitor the release notes for more information about the timing of the additional changes.

NOTE: This change only affects companies that filter incoming email based on IP addresses.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If your company uses Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure that all required IP address Safe Senders lists are updated so that your users continue to receive SAP Concur email without interruption.

Ongoing Updated Email Format

Overview

SAP Concur has provided a release note about the updated email notifications for several months. ***Be aware that we will discontinue this release note in two months.***

IMPORTANT

Note the following:

- The email content has not changed – just the look and feel has been updated.
- 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.

NOTE: One sample from Expense is shown below. No other samples from other products will be shown in these release notes.

- Do not expect that all product emails will change at the same time. For example, the Expense approval email might be first, and then other Expense notifications might follow.
- There is no assigned end date for the project. The changes might take longer than a year.

IMPORTANT for SSO Clients

For clients who use SSO, a lengthy URL might be replaced with www.concursolutions.com. For example, the URL in the expense report status change email might be replaced. Because some URLs can reach 200 characters in length, the decision was made to provide the www.concursolutions.com link instead, providing a better experience for users.

NOTE: Even though clients can define URLs that are an acceptable length, the SAP Concur system appends additional characters – primarily to satisfy mobile requirements – and those extra characters can extend the URL up to 200 characters.

The link in the email still works as it always has – redirecting the user for proper SSO authentication. The user can see the underlying URL at any time by hovering the mouse pointer over the www.concursolutions.com link.

This change does not affect those emails where the user clicks a button – instead of a link – to access Concur Expense.

What the User Sees

New email look-and-feel:

Configuration / Feature Activation

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

SAP Concur Support Portal

Security Questions Available When Using the SAP Concur Support Portal

Overview

Prior to 2017, Authorized Support Contacts (ASCs) using the SAP Concur support portal were required to answer security questions prior to interacting with support. This feature was retired while it was being redesigned.

As of January 3, the feature is again available.

BUSINESS PURPOSE / CLIENT BENEFIT

Clients appreciate this feature because it provides another layer of security. It prevents someone from impersonating:

- An ASC and then requesting an improper or unexpected configuration change

  – or –

- An end user and then accessing their confidential data

What the ASC Sees

ASCs can turn on the Security Questions feature, as described below. The Security Questions feature:

- Is optional and OFF by default
- Can be enable by any ASC for the following users:
  - ASCs within the company
  - End users within the company (if they use the User Support Desk service)
  - ASCs and end users within the company (if they use the User Support Desk service)

Be aware that:

- If an ASC enables the feature, then it is enabled for all the company's ASCs/end users (depending on the option selected when enabled).
- Using security questions applies to everyone, but each ASC/end user defines which security questions they answer.
- Any other ASC can disable the feature or change which audience has to answer the questions.
- All ASCs within a company should discuss and agree on their plan for this feature. The actions of the ASC enabling/disabling the feature or changing the audience is not logged. It is very important that all ASCs in a company agree on how this feature will work for their company and who can make changes.

SAP Concur cannot enable this feature on behalf of a company or an ASC.

ENABLE OR DISABLE THE FEATURE

The ASC can enable/disable the feature in **My Profile** in the SAP Concur support portal.

On the **User Information Confirmation** page, the new **Additional Call Center Security Questions** section is used to enable the feature. The ASC can also define the security questions they want to answer.

When the ASC selects an option other than *None*, the section expands so the ASC can choose their desired questions.

NOTE: Regarding the questions and answers provided by the ASC, they apply only to that ASC. They will be available only in that ASC's profile; they will not be seen by other ASCs or end users.

How it Works

Once the feature is enabled, when ASCs/end users (depending on the option selected when enabled) sign in to the SAP Concur support portal, they are presented with their **User Information Confirmation** page. They must answer their security questions and save.

NOTE: Once they have entered their answers, those answers are visible only to them and to SAP Concur employees.

Then, when the ASC and/or end user calls SAP Concur (or asks SAP Concur to call them back), the SAP Concur support employee will access the caller's record and ask the security questions.

Then:

- If the caller answers the questions correctly, the support employee clicks **I Acknowledge** and the call continues.
- If the caller cannot answer the questions correctly, the support employee clicks **Go Back**. The caller is instructed to sign in to the SAP Concur support portal and review the questions/answers and make any necessary changes. The changes will be immediate, and the questions can be asked again of the caller or the caller can call back once they update their questions.

Chat is not affected by the security questions. Since the user has already signed in with the proper credentials, the SAP Concur support employee will simply click **I Acknowledge**.

Configuration / Feature Activation

The feature is currently available.

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. Per recommended security-related best practices, custom fields should not contain personal or sensitive data.

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

Next Steps

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.

📖 For additional information, refer to the *FAQ*.

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 Targeted for April Release

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 second quarter in 2019.

NOTE: Contact your SAP Concur representative for more information about the Early Access program.

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 the SAP Concur 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 the SAP Concur 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.

NOTE: The term change is targeted for the April release.

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.

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.

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. The flexible workflow feature for Budget that SAP Concur offers 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**.

Company Administration

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.

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. SSO is currently supported for Concur Expense, Concur Invoice, Concur Request, and Concur Travel.

Other SAP Concur products and services are outside the scope of this initial release.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Administration > Company > Company Admin** page.

NOTE: This new feature does not affect Concur Travel clients who are already using the Security Keys feature.

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 coming in a future release note.

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.

Training Administration

Planned Changes Optimizing and Relocating the Page

Overview

To simplify the **Training Administration** page, the functionality and content will be changing.

In addition to content changes, access to the **Training Administration** page will move from **Company Admin** to **Tools**.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes will make the Training Administration feature easier to find and use.

Configuration / Feature Activation

The changes will be automatically available; additional information about potential configuration or activation steps will be provided in a later version of these release notes.

📖 For general information about the Training Administration feature, refer to the *Shared: Training Administration Setup Guide*.

Test User Admin

Planned Changes Retiring the Purge Test User Transactions Functionality

Overview

SAP Concur is retiring the functionality in the Test User Admin feature that removes the transactions of test users from Concur Expense, Concur Invoice, Concur Travel, and Concur Request.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will allow SAP Concur to devote more resources to development and maintenance of features that are used by many or most of our clients.

What the Admin Sees

The **Test User Admin** page will no longer display the **Purge Test User Transactions** button.

Before

NOTE: To access the page, click **Administration > Expense** (or **Invoice** or **Requests**) **> Test User Admin**.

After

Configuration / Feature Activation

The functionality will automatically be removed.

For general information about the Test User Admin feature, refer to the *Shared: Test User Setup Guide*.

Miscellaneous

Planned Changes Archive Deactivated User Data

This information will no longer appear in the release notes.

For more information about deactivated users, refer to the *General Information: Archiving Deactivated User Data Fact Sheet*.

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.

SAP Concur Support Case Status

This release might resolve previously submitted support cases. You can check the status of a support case to confirm whether the case issue has been resolved.

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**.

The SAP Concur support page displays.

If the **Contact Support** option is not available in the Help menu, then your company has chosen to support the SAP Concur system internally. Please contact your internal support desk for assistance.

3. In the **Quick Search** field, enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

February Example

The table below contains some example cases that are resolved in this release. It is not a comprehensive list of the resolved cases.

Case ID	Description
12371248	**Audit Rules** Audit rule did not run as expected.
13148588	**Payment Manager** The **Invoice > Payment Manager > Extract Reconciliation** page did not load correctly.
13087480	**Approval Routing** Invoice Approval moved two steps forward in workflow when inadvertently clicked twice in succession.
12707361	**Create and Approve Vendors** Unable to edit vendors in Create and Approve Vendors user interface.

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**.

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SAP Concur Release Notes **Invoice Professional/Premium** Includes: Concur Invoice, Capture Processing, Invoice Pay, Purchase Requests and Purchase Orders	
Month	**Audience**
Release Date: March 16, 2019 Update 1: Wednesday, April 3, 12:00 PM PST	SAP Concur Client FINAL

Contents

Release Notes **2**

Concur Invoice **2**

Reminder New User Interface for Concur Invoice Accounts Payable Available for Client Review and Opt-In 2

E-Bunsho Timestamp Feature for Invoice Generally Available (Japan) 3

Purchase Request **4**

Set Default Value of Receipt Type Field on the Purchase Request Item Form 4

Purchase Order **5**

Purchase Order List Available for Clients Who Import Purchase Orders for Matching 5

Shipping Configuration Page Available to Purchase Order Clients 6

Vendor Management **7**

Audit Trail for Vendor Changes (Released February 22) 7

Create and Approve Vendors Feature Available in Test Environments (Released February 22) 9

Company Administration **10**

New SSL Certificate for concursolutions.com – Updated Date 10

Concur Open **11**

Messaging for Concur Open and Personalized Concur Open 11

SAP Concur Email **12**

Ongoing Email Infrastructure Change - Add IP Addresses to Safe Senders List 12

Ongoing Updated Email Format 12

Miscellaneous **14**

Reminder: No Personal or Sensitive Data in Custom Fields 14

Planned Changes **16**

Concur Invoice **16**
Planned Changes New User Interface for Concur Invoice Targeted for April Release 16
Planned Changes Payment Request(s) Renamed to Invoice(s) 19
Purchase Order **19**
Planned Changes Import Now for PO and PO Receipt Imports 19
Budget **20**
Planned Changes Workflows for Budget 20
Security **21**
Planned Changes No Future Bulk Password Resets or Updates via Import File 21
Company Administration **22**
Planned Changes Composite Logins to be Deprecated 22
Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur 25
Planned Changes New SAP Concur Sign In Page 26
Planned Changes New Forgot Password Page and Related Feature Deprecation 36
Training Administration **42**
Planned Changes Optimizing and Relocating the Page 42
Test User Admin **43**
Planned Changes Retiring the Purge Test User Transactions Functionality 43

Client Notifications **45**
Subprocessors **45**
SAP Concur Non-Affiliated Subprocessors 45
Browser Certifications **45**
Monthly Browser Certifications and Supported Configurations 45

SAP Concur Support Case Status **46**
Check Support Case Status **46**
March Example 47

Additional Release Notes and Other Technical Documentation **49**
Online Help – Admins **49**
SAP Concur Support Portal – Selected Users **50**

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Release Notes

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

Concur Invoice

Reminder New User Interface for Concur Invoice Accounts Payable 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 second quarter in 2019.

Updates for March

For clients reviewing this feature, SAP Concur has now added the following features:

- *Title* has been renamed to *Invoice Name* in the **Search** list on the **My Invoices** page
- Window appears on submit or assign asking users if they want to go to the next invoice or return to the list of invoices
- In the **View** menu, on the **My Invoices** page, the *Purchase Order Invoices* option has been renamed to *All Sent to Purchasing* and a new *Sent to Purchasing* option has been added

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 *Concur Invoice Accounts Payable User Experience Enhancement Client Fact Sheet* and the ***Planned Changes** New User Interface for Concur Invoice Soon Available* release note in this document.

E-Bunsho Timestamp Feature for Invoice Generally Available (Japan)

Overview

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

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.

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

The admin sees a new list in the Policies tool.

Configuration / Feature Activation

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 Professional.

Purchase Request

Set Default Value of Receipt Type Field on the Purchase Request Item Form

Overview

A Concur Invoice administrator with the appropriate permissions can now configure the default value for the **Receipt Type** field that appears on the Purchase Request Item form. Prior to this change, the **Receipt Type** field defaulted to **Quantity Receipt** for goods items and **None** for service items.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature enables an administrator to set the default value for the **Receipt Type** for goods items and service items to either **Quantity Receipts** or **None** to ensure that the receipt type defaults to the desired value.

What the Invoice Admin Sees

On the Concur Invoice **Forms and Fields** page, when the admin configures the **Receipt Type** field for a Purchase Request Item form, the admin can set the **Default Value Type** to **Constant** and can select the desired default value from the drop-down menu in the **Default Value** field.

Configuration / Feature Activation

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

Purchase Order

Purchase Order List Available for Clients Who Import Purchase Orders for Matching

Overview

For clients who import purchase orders on entities that do not have the Purchase Request feature enabled, a user who is assigned the Purchasr Order Processor or Purchase Order Processor (Audit) role can now see a list of imported purchase orders.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature enables clients that handle purchase order invoices to more easily manage and view imported purchase orders.

What the Purchasing Admin Sees

Users with the Purchasing Order Processor or Purchase Order Processor (Audit) role see a list of imported purchase orders on the **Requests > All Purchase Orders** page.

Configuration / Feature Activation

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

Shipping Configuration Page Available to Purchase Order Clients

Overview

For clients who import purchase orders on entities that do not have the Purchase Request feature enabled, a user who is assigned the Invoice Configuration Administrator or Invoice Configuration Administrator (Restricted) role now has access to the **Administration > Invoice > Shipping Configuration** page.

BUSINESS PURPOSE / CLIENT BENEFIT

The **Shipping Configuration** page enables clients to create shipping methods (for example, FedEx 2Day and UPS Ground) and shipping terms (for example, FOB) which can be included on purchase orders imported from an external system.

What the Purchasing Admin Sees

Users with the Invoice Configuration Administrator or Invoice Configuration Administrator (Restricted) role see **Shipping Configuration** on the **Invoice Processing Admin** menu on the **Administration > Invoice** page.

After clicking **Shipping Configuration**, the **Shipping Configuration** page appears. On the **Shipping Configuration** page, the admin can create, edit, and delete shipping methods and shipping terms.

Configuration / Feature Activation

This feature is automatically available to users with the Invoice Configuration Administrator or Invoice Configuration Administrator (Restricted); there are no additional configuration or activation steps.

Vendor Management

Audit Trail for Vendor Changes (Released February 22)

Overview

Clients with the Create and Approve Vendors feature enabled can now 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 appear on the **Audit Trail** page.

NOTE: The Create and Approve Vendors feature is *disabled* by default on Professional entities.

BUSINESS PURPOSE / CLIENT BENEFIT

This change enables 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 **View Audit Trail**, the audit trail page for the selected vendor appears.

The audit trail can be downloaded to a comma-separated (.csv) file by clicking the **Download Audit Trail** link. The file is downloaded to the default download location on the local machine.

Configuration / Feature Activation

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

For more information about the Create and Approve Vendors feature, refer to the *Invoice: Vendor Manager User Guide*.

Create and Approve Vendors Feature Available in Test Environments (Released February 22)

Overview

The Create and Approve Vendors feature is now 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.

Company Administration

New SSL Certificate for concursolutions.com – Updated Date

Overview

In an effort to ensure the ongoing security of our products and services, SAP Concur has issued a new concursolutions.com SSL certificate. ***The current certificate will expire on March 16, 2019.***

Any client who has pinned this expiring certificate will need to update to the new certificate prior to March 16, 2019. If the pinned certificate is not updated prior to March 16, 2019, your organization and users will experience disruption to SAP Concur products and services.

Clients who have not pinned the certificate do not need to take any action as the new certificate is updated automatically. Most clients do not pin the certificate.

Please be aware: As an enhancement to our Security and Compliance program, this certificate will be updated on an annual basis.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides ongoing security for our products and services.

Configuration / Feature Activation

Please consult with your IT department to check if this applies to you.

The new SSL certificate can be accessed here:
http://assets.concur.com/concurtraining/cte/en-us/concursolutions.cert.pem

Supply this URL to your IT department.

To save the certificate, click the link above, select all the text in the browser, copy it to a file, then name the file concursolutions.cert.pem.

Concur Open

Messaging for Concur Open and Personalized Concur Open

Overview

Concur Open and Personalized Concur Open users can subscribe to email notifications about the SAP Concur products they use. As part of the subscription process, SAP Concur sends a verification email to the user. The user must click **Verify** in the email in order to receive the notifications.

Because some users are not completing the verification step, SAP Concur has added a reminder to the subscription page.

NOTE: This message appears ***only*** if the subscriber has not responded to the verification email.

For more information about Personalized Concur Open, refer to the *Personalized Concur Open* fact sheet.

What the User Sees

The following highlighted message appears on the Personalized Concur Open subscription page.

A similar message appears for Concur Open users.

Configuration / Feature Activation

The feature is automatically on; 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 services to SAP Concur users. Because of this, companies that filter inbound email based on the sending IP address *must* add new IP addresses to their Safe Senders list to ensure that their users receive email from SAP Concur.

IMPORTANT: All Services Will Soon Be Affected

Initially, the issue described here affected only companies that use Concur Expense. Starting in January, email from other SAP Concur services (such as Concur Travel and Concur Pay) will move to the new email infrastructure.

We will continue to add other services throughout the first quarter of 2019. Please monitor the release notes for more information about the timing of the additional changes.

NOTE: This change only affects companies that filter incoming email based on IP addresses.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If your company uses Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure that all required IP address Safe Senders lists are updated so that your users continue to receive SAP Concur email without interruption.

Ongoing Updated Email Format

Overview

SAP Concur has provided a release note about the updated email notifications for several months. ***Be aware that we will discontinue this release note after this month.***

IMPORTANT

Note the following:

- The email content has not changed – just the look and feel has been updated.

- 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.

NOTE: One sample from Expense is shown below. No other samples from other products will be shown in these release notes.

- Do not expect that all product emails will change at the same time. For example, the Expense approval email might be first, and then other Expense notifications might follow.
- There is no assigned end date for the project. The changes might take longer than a year.

IMPORTANT for SSO Clients

For clients who use SSO, a lengthy URL might be replaced with www.concursolutions.com. For example, the URL in the expense report status change email might be replaced. Because some URLs can reach 200 characters in length, the decision was made to provide the www.concursolutions.com link instead, providing a better experience for users.

NOTE: Even though clients can define URLs that are an acceptable length, the SAP Concur system appends additional characters – primarily to satisfy mobile requirements – and those extra characters can extend the URL up to 200 characters.

The link in the email still works as it always has – redirecting the user for proper SSO authentication. The user can see the underlying URL at any time by hovering the mouse pointer over the www.concursolutions.com link.

This change does not affect those emails where the user clicks a button – instead of a link – to access Concur Expense.

What the User Sees

New email look-and-feel:

Configuration / Feature Activation

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

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. Per recommended security-related best practices, custom fields should not contain personal or sensitive data.

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

Next Steps

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.

📖 For additional information, refer to the *FAQ*.

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 Targeted for April Release

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 second quarter in 2019.

NOTE: Contact your SAP Concur representative for more information about the Early Access program.

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 the SAP Concur 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 the SAP Concur 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.

NOTE: The term change is targeted for the April release.

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.

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.

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. The flexible workflow feature for Budget that SAP Concur offers 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**.

Security

Planned Changes No Future Bulk Password Resets or Updates via Import File

Overview

In a future release, the ability to reset or update user passwords through the User Import and Employee Import features, will be removed. The ability to set the password for new users during the initial import through the User Import and Employee import features will still be available.

NOTE: At this time, SAP Concur plans on providing a bulk password reset tool in the future.

USER IMPORT

The password field will remain available in the downloadable Excel template, but will only be read during an initial import of the file, or when creating a new user in the system. Subsequent uses of the field will be ignored by the system.

For general information about this functionality, refer to the *Shared: User Import User Guide*.

EMPLOYEE IMPORT

The password fields will remain available in the 100, 300, 305, and 310 records sets, but will only be read during an initial import of the file, or when creating a new user in the system. Subsequent uses of the field will be ignored by the system. The update and replace password features on the 100 record will no longer be used.

For general information about this functionality, refer to the *Shared: Employee Import Specification*.

BUSINESS PURPOSE / CLIENT BENEFIT

This change provides greater security for user passwords.

Configuration / Feature Activation

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

Company Administration

Planned Changes Composite Logins to be Deprecated

Overview

In a future release, SAP Concur will no longer support composite login sign-in page URLs.

Composite login functionality allows users to use a login ID that does not include a domain to log in to SAP Concur products. The typical URL for a composite login page includes the name of the entity (for example, entity=pxxxxxxxxx) and is formatted as follows: https://www.concursolutions.com/signin.asp?entity=pxxxxxxxxx.

After this change is implemented, all users who use only their username to log in will need to use their **CTE Login Name** rather than their login ID to log in to SAP Concur products.

In addition, all clients will use the standard **Sign In** page to access SAP Concur products. The standard sign in page is located at the following address: https://www.concursolutions.com/nui/signin

Deprecation of the composite login pages for www.concursolutions.com is targeted for May 11, 2019.

IMPACTS TO USERS

Users who log in to a composite login page (https://www.concursolutions.com/signin.asp?entity=pxxxxxxxxx) ***and*** do not use an at (@) symbol in their user name must contact their company administrator to get their **CTE Login Name**. User passwords will remain the same.

Single Sign-On functionality is not impacted by this change. The following users will not be impacted because they do not log in using https://www.concursolutions.com:

- SAP Concur web SSO
- Concur Mobile username/password
- Concur Mobile SSO

BUSINESS PURPOSE / CLIENT BENEFIT

Deprecating this feature improves login stability and login success rates, while reducing login dependency.

What the User Sees

Users are currently seeing a message on composite login pages about the planned deprecation.

All users who use only their username (ex: johndoe) to log in will need to use their **CTE Login Name** rather than their login ID to log in to SAP Concur products.

BEFORE

AFTER

What the Admin Sees

On the **User Administration** page, under **General Settings**, admins will see the **CTE Login Name** for each user.

NOTE: For future employee imports, include the domain name for users who previously did not have a domain name in the Concur Expense database.

Configuration / Feature Activation

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

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.

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. SSO is currently supported for Concur Expense, Concur Invoice, Concur Request, and Concur Travel.

Other SAP Concur products and services are outside the scope of this initial release.

The new Manage Single Sign-On (SSO) feature will be accessible from the **Administration > Company > Company Admin** page.

NOTE: This new feature does not affect Concur Travel clients who are already using the Security Keys feature.

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 coming in a future release note.

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 be able to start the SSO login process at www.concursolutions.com. 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 (planned for a future release)
- **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.

Planned Changes New Forgot Password Page and Related Feature Deprecation

Overview

SAP Concur will add a new Forgot Password feature to the SAP Concur **Sign In** page, providing an updated login experience for users who log in with user name and password credentials.

When the new Forgot Password feature is released (targeted for May 11th), the following existing **Forgot Password** page functionality will be deprecated:

- **Security Questions:** Users will no longer receive security question prompts for login authentication.

- **On-page text:** Company custom text will no longer be displayed.
- **Password hints:** The option, **Send me an email with my password hint**, will no longer be available.

NOTE: SAP Concur currently plans to release the Forgot Password feature in advance of the planned New SAP Concur **Sign In** page. For more information, refer to the **Planned Changes** New SAP Concur Sign In Page* release note in this document.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides greater security for user passwords and streamlines the user experience.

What the User Sees – Current Forgot Password Page

When a user enters an incorrect password on the SAP Concur **Sign In** page (www.concursolutions.com) and clicks the **Forgot Password?** link, a **Forgot Password** page displays. This page has options for the user to have an email sent to a verified account that includes a password hint or a link to reset the password. Some companies also have custom text that displays on this page.

What the User Sees – New Forgot Password Page

When a user enters an incorrect password on the SAP Concur **Sign In** page (www.concursolutions.com) and clicks the **Forgot Password?** link, a new **Forgot Password** page will display. The user will enter their user name and click **Submit**. A reset password notification email will then be sent to the user's verified email account.

The user will open the reset password notification email, which includes a one-time reset password link that is valid for 24 hours. The user will click the **Reset Your Password** icon in the email.

SAP Concur

Hello John Smith,

To reset the password associated with Login ID jsmith, please click on the following button:

Reset Your Password

If the button is not working correctly or is not being displayed, please copy and paste the link below into your browser:
https://www.concursolutions.com/nui/signin/reset/password?lang=en&email=encryptedEmail&token=uuid-123

This link will expire in 24 hours.

If you are experiencing difficulty with this link and require assistance, please contact your program administrator at your company.

Kind Regards, Customer Support Concur Technologies, Inc.

This email was sent by: SAP Concur - 601 108th Ave NE, Bellevue, WA 98004, USA

The **Password Reset** page opens in the user's browser.

The user will see the company's password policy display on the page. The user will enter a new password in the **New Password** and **Re-enter New Password** fields. If the passwords do not match, an on-page message alerts the user.

The user can also click on the **Password Help Info** icon to view a hint to make the password stronger.

The user then clicks the **Submit** button to create the new password.

Once the password is validated, the user will see a message confirming that the new password has been successfully created.

The user will click **OK**. The user will be directed to www.concursolutions.com to log in with the new password.

FAILED PASSWORDS

If the new password fails validation, the **Password Reset** page will display errors to help the user create a password that meets their company requirements.

Configuration / Feature Activation / Feature Deprecation

Additional information will be provided in a future version of the release notes.

Training Administration

Planned Changes Optimizing and Relocating the Page

Overview

To simplify the **Training Administration** page, the functionality and content will be changing.

In addition to content changes, access to the **Training Administration** page will move from **Company Admin** to **Tools**.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes will make the Training Administration feature easier to find and use.

Configuration / Feature Activation

The changes will be automatically available; additional information about potential configuration or activation steps will be provided in a later version of these release notes.

For general information about the Training Administration feature, refer to the *Shared: Training Administration Setup Guide*.

Test User Admin

Planned Changes Retiring the Purge Test User Transactions Functionality

Overview

SAP Concur is retiring the functionality in the Test User Admin feature that removes the transactions of test users from Concur Expense, Concur Invoice, Concur Travel, and Concur Request.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will allow SAP Concur to devote more resources to development and maintenance of features that are used by many or most of our clients.

What the Admin Sees

The **Test User Admin** page will no longer display the **Purge Test User Transactions** button.

Before

NOTE: To access the page, click **Administration > Expense** (or **Invoice** or **Requests**) **> Test User Admin**.

After

Configuration / Feature Activation

The functionality will automatically be removed.

For general information about the Test User Admin feature, refer to the *Shared: Test User Setup Guide*.

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.

SAP Concur Support Case Status

This release might resolve previously submitted support cases. You can check the status of a support case to confirm whether the case issue has been resolved.

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**.

The SAP Concur support page displays.

If the **Contact Support** option is not available in the Help menu, then your company has chosen to support the SAP Concur system internally. Please contact your internal support desk for assistance.

3. In the **Quick Search** field, enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

March Example

The table below contains some example cases that are resolved in this release. It is not a comprehensive list of the resolved cases.

NOTE: The contents of this table are intended for SAP Concur employees only; do not distribute this information outside of SAP Concur.

Case ID	CRMC #	Defect #	Description	Client
13220210	CRMC-130630	EXP-27176	**List Management** In List Management, some numerical item codes that contained a dot were incorrectly rounded up or down.	Eversheds Sutherland (International) LLP
13303301 13290435	CRMC-130450 CRMC-130285	INV-31554	**Auditing** An audit rule that was configured to run when an invoice was submitted, was incorrectly triggered by a different event.	Chemical Financial Corp., Nihon Unisys, LTD.
13243690	CRMC-130007	INV-31577	**Invoice Approval** Invoice Approvers received "Unexpected System Error" messages and experienced slow performance in Concur Invoice.	PetVet Care Centers
13210613	CRMC-130000	INV-31454	**Capture Processing** On the **Email Administration** tab, in some cases, when the **Alias Name** was updated, the change was not saved.	The Kellen Company
12955001	CRMC-129650	INV-31643	**Expense Types** The Tax Code was not updated when the Expense Type was changed in an invoice line item.	DAIWA LIFENEXT CO., LTD.

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**.

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SAP Concur Release Notes **Invoice Professional/Premium** Includes: Concur Invoice, Capture Processing, Invoice Pay, Purchase Requests and Purchase Orders	
Month	**Audience**
Release Date: April 13, 2019 Update 1: Friday, April 18, 5:00 PM PST	SAP Concur Client FINAL

Contents

Release Notes **2**

Concur Invoice **2**

New User Experience Enhancements for Concur Invoice 2

Purchase Request **8**

Vendor Field in PR Line Item Defaults to Previously Selected Vendor 8

Payment Manager **9**

Payment Confirmation Extract Available Without Invoice Pay 9

Invoice Pay **10**

Updated Direct Debit Request Form (Australia) 10

Budget **10**

Workflows for Budget Now Available 10

SAP Concur Email **13**

Ongoing Email Infrastructure Change - Add IP Addresses to Safe Senders List 13

Miscellaneous **14**

Reminder: No Personal or Sensitive Data in Custom Fields 14

Planned Changes **15**

Purchase Order **15**

Planned Changes Import Now for PO and PO Receipt Imports 15

Authentication **16**

Planned Changes No Future Bulk Password Resets or Updates via Import File 16

Planned Changes Composite Logins to be Deprecated 17

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur21

Planned Changes Forgot Password Feature, Security Questions, and Password Custom Text 22

Company Administration **32**
Planned Changes SAP Concur Product Access Changes 32
Planned Changes New SAP Concur Sign In Page 32
Training Administration **42**
Planned Changes Optimizing and Relocating the Page 42
Test User Admin **43**
Planned Changes Retiring the Purge Test User Transactions Functionality 43

Client Notifications **45**
Subprocessors **45**
SAP Concur Non-Affiliated Subprocessors 45
Browser Certifications **45**
Monthly Browser Certifications and Supported Configurations 45

SAP Concur Support Case Status **46**
Check Support Case Status **46**
April Example 47

Additional Release Notes and Other Technical Documentation **48**
Online Help – Admins **48**
SAP Concur Support Portal – Selected Users **49**

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Release Notes

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

Concur Invoice

New User Experience Enhancements for Concur Invoice

Overview

SAP Concur now offers 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 landing page, **Invoice Manager**, contains links to important tasks the AP user needs to perform daily, such as assign and submit invoices. The **Invoice Manager** page is also available for the Invoice Processor with links similar to the AP user. The following image shows all the options available on the page if you have several roles. This means that the **Invoice Manager** page will differ depending on the role the user has.

NOTE: SAP Concur has utilized existing group and policy configuration in the legacy user interface when displaying counts and cards on the new **Invoice Manager** page to ensure clients continue to see only what they are supposed to.

Another new page, **Unassigned Invoices**, appears when AP users click on the **Unassigned Invoices** link on the **Invoice Manager** page.

In addition, Concur Invoice has added a new **My Invoices** page, which is accessed by clicking **My Tasks** > **Unsubmitted Invoices** or **All My Invoices** from the **Invoice Manager** page**.**

NOTE: Non-AP users are directed to the **My Invoices** page when they click the **Invoice** tab. The **Invoice Manager** page is not accessible to them.

The first time a user logs in to Concur Invoice, they will see a **Welcome back!** window with information about the new user experience. Users can click the **Learn More** button to read more about the new user experience. This window will only appear once for a user and will be removed from the product in the near future.

BUSINESS PURPOSE / CLIENT BENEFIT

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

Term Changes

With the new user experience, several terms have changed name. These terms are listed in the table below.

Previous Term	New Term
Request ID	Invoice ID
Request Name	Invoice Name
Payment request or Payment Request	Invoice
Payment Request Type	Policy

NOTE: At this point, imports, extracts, and any customizations performed by clients are not included in the term change. In addition, the term *Request Key* will not change either.

What the Invoice AP User Sees

The Invoice AP User will see a new **Invoice Manager** page when they click on the **Invoice** tab.

NOTE: The **Sent to Purchasing** link will only display if the user also has the Invoice Purchasing User role and the **Unverified Capture** link will only display if the user has the Client managed Capture Verifier role.

In addition, they will see a new **Unassigned Invoices** page.

The **My Request** page has been redesigned and renamed to the **My Invoices** page.

What the Invoices Processor and Invoice Processor (Audit) See

The Invoice Processor will see a new **Invoice Manager** page when clicking the **Invoice** tab.

NOTE: The **Unapproved Vendors** link will only display if the user also has the Invoice Vendor Manager role.

What the Invoice Configuration Administrator Sees

Apart from seeing everything that the AP user and Invoice Processor see, the user with the Invoice Configuration Administrator role will also see an **Edit Company Dashboard** button in Invoice Manager.

When they click this button, the tiles in the **Active Invoices** section will display an editing icon.

Clicking the editing icon, the Invoice Configuration Administrator will see an **Unassigned Invoices** window where they can define how long an invoice should be unassigned before showing the user an alert.

Once the Invoice Configuration Administrator has finished editing and clicked **Save**, they are returned to the **Invoice Manager** page and can click the **Finish Editing** button.

What the Invoice User Sees

Concur Invoice users who have access to the **My Requests** page will see a newly designed **My Invoices** page that is more modern and aligns with Next Gen UI initiatives across the SAP Concur Spend platform. Many of the items in the **Actions**

menu are now buttons, one for each action, and images are more easily accessible in their own **Image** column.

Configuration / Feature Activation

This feature is automatically available; no configuration or activation is required.

For more information, refer to the *Concur Invoice Accounts Payable User Experience Enhancement Client Fact Sheet*.

Purchase Request

Vendor Field in PR Line Item Defaults to Previously Selected Vendor

Overview

When line items are added to a new or existing purchase request on the **Purchase Details** page, after the first line item is added, the **Vendor** field for subsequent line items defaults to the previous selected vendor.

Prior to this change, the vendor had to be manually selected each time a new purchase request line item was added.

BUSINESS PURPOSE / CLIENT BENEFIT

This change reduces the number of steps required to add subsequent line items, to a purchase request making the process of creating and updating purchase requests more efficient and less time consuming.

What the Purchase Request User Sees

On the **Purchase Details** page, after adding the first line item to a purchase request, when subsequent line items are added, the user sees the previously selected vendor name in the **Vendor** field.

Configuration / Feature Activation

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

Payment Manager

Payment Confirmation Extract Available Without Invoice Pay

Overview

With this release, payment managers will be able to use the Payment Confirmation Extract without Invoice Pay being enabled. This is helpful for Concur Invoice provider pay users so that they can export provider payment information together with SAP Concur payment data.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature enables clients, who use the payment provider, to download payment confirmation extract data to reconcile their ERP.

What the Payment Manager Sees

Payment managers will see the **Payment Confirmation Extract** link in the **Extract** section of the Payment Manager.

Configuration / Feature Activation

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

Invoice Pay

Updated Direct Debit Request Form (Australia)

Overview

The Direct Debit Request form for Invoice Pay clients in Australia has been updated to more accurately reflect the name of the service agreement. The text that was in the **Service Agreement** field of the form is "Concur Business Service Agreement (BSA) and Service Description Guide (SDG)" and the current text is "Agreement for the SAP Concur Service."

NOTE: Other minor changes have been made to this form, such as updating our company logo.

BUSINESS PURPOSE / CLIENT BENEFIT

The new text more accurately covers the various SAP Concur client contracts.

What the Admin Sees

Clients cannot directly access this form, but when it is provided to them, they will see an updated Service Agreement name.

Budget

Workflows for Budget Now Available

Overview

Workflows are now available for Budget. Workflows define how the system routes invoices, expense reports, and requests through approval and processing steps. The flexible workflow feature for Budget that SAP Concur offers 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 that more important (to the organization) spending will be declined because lesser 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 committed.

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.

IMPORTANT TO NOTE

Clients should note the following:

- If clients are using the old Concur Expense user interface, the budget approval step does not display the budget approver on the mobile app until after the step in the workflow. This also means that the budget approval step does not work if clients use the mobile app to approve expense reports that include budget.
- Japanese clients who use e-Bunsho and China Data Center clients must use the old Concur Expense UI. Thus, SAP Concur recommends that these clients do not approve budgets on the mobile app.
- The approval flow windows on mobile, available for Concur Invoice only, do not display the budget approver until after the budget approval step is completed. However, this does not prevent anyone from approving invoices for Budget.

What the Admin Sees

The admin will see the new *Budget Approval* step available in the Workflows tool.

In addition, they will see a new **Manage Approvers (Optional)** tab in the **Add Budget Item** and **Modify Budget Item** windows in Budget Items.

NOTE: There is a limit of five budget approvers per budget item.

What the Approver Sees

The approver will see the budget approvers in the **Approval Flow** window. The window displays budgets that are approved, auto approved, and not approved.

NOTE: Concur Expense and purchase request on mobile do not have the approval flow windows.

Configuration / Feature Activation

The administrator needs to configure this feature on the **Workflows** page by clicking **Administration** > **Invoice** or **Expense**.

For more information, refer to the Concur Budget Workflow Client Fact Sheet.

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 services to SAP Concur users. Because of this, companies that filter inbound email based on the sending IP address *must* add new IP addresses to their Safe Senders list to ensure that their users receive email from SAP Concur.

IMPORTANT: All Services Will Soon Be Affected

Initially, the issue described here affected only companies that use Concur Expense. Starting in January, email from other SAP Concur services (such as Concur Travel and Concur Pay) will move to the new email infrastructure.

We will continue to add other service. Please monitor the release notes for more information about the timing of the additional changes.

NOTE: This change only affects companies that filter incoming email based on IP addresses.

Configuration / Feature Activation

The new IP addresses are not published publicly but they are available by contacting SAP Concur support. If your company uses Concur Expense and if your company filters incoming email based on IP address, please work with your email server management team to ensure that all required IP address Safe Senders lists are updated so that your users continue to receive SAP Concur email without interruption.

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. Per recommended security-related best practices, custom fields should not contain personal or sensitive data.

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

Next Steps

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.

📖 For additional information, refer to the *FAQ*.

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.

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.

Authentication

Planned Changes No Future Bulk Password Resets or Updates via Import File

These changes are part of the SAP Concur continued commitment to maintaining secure authentication.

Overview

In a future release, the ability to reset or update user passwords through the User Import and Employee Import features, will be removed. The ability to set the password for new users during the initial import through the User Import and Employee import features will still be available.

USER IMPORT

The password field will remain available in the downloadable Excel template, but will only be read during an initial import of the file, or when creating a new user in the system. Subsequent uses of the field will be ignored by the system.

For general information about this functionality, refer to the *Shared: User Import User Guide*.

EMPLOYEE IMPORT

The password fields will remain available in the 100, 300, 305, and 310 records sets, but will only be read during an initial import of the file, or when creating a new user in the system. Subsequent uses of the field will be ignored by the system. The update and replace password features on the 100 record will no longer be used.

📖 For general information about this functionality, refer to the *Shared: Employee Import Specification*.

BUSINESS PURPOSE / CLIENT BENEFIT

This change provides greater security for user passwords.

Configuration / Feature Activation

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

Planned Changes Composite Logins to be Deprecated

These changes are part of the SAP Concur continued commitment to maintaining secure authentication.

Overview

In a future release, SAP Concur will no longer support composite login sign-in page URLs.

Composite login functionality allows users to use a login ID that does not include a domain to log in to SAP Concur products.

All users who use only their username (ex: johndoe) to log in will need to use their **CTE Login Name** rather than their login ID to log in to SAP Concur products.

NOTE: The **CTE Login Name** mentioned here is the login name that appears in the **CTE Login Name** field in **Administration > Company > Company Administration > User Administration**.

SAP Concur will no longer support composite login sign-in page URLs. The typical URL for a composite login page includes the name of the entity (ex: entity=pxxxxxxxxx) and looks like this: https://www.concursolutions.com/signin.asp?entity=pxxxxxxxxx.

All clients will be using the standard **Sign In** page to access SAP Concur products. The standard sign in page is https://www.concursolutions.com/nui/signin.

Deprecation of the composite login pages for www.concursolutions.com is targeted for May 11, 2019.

NOTE: The employee import and other utilizations of composite logins are not yet being deprecated and will continue to function as they do currently. Only the user-facing portion of composite login is being deprecated at this time.

IMPACTS TO USERS

Users who log in to a composite login page (https://www.concursolutions.com/signin.asp?entity=pxxxxxxxxx) ***and*** do not use the at (@) symbol in their user name will need to click the **Forgot your user name?** link on the **Sign In** page to retrieve their user name without assistance (preferred) or contact their company administrator to get their **CTE Login Name**. User passwords remain the same.

Single Sign-On functionality is not impacted by this change. The following users will not be impacted because they do not log in using https://www.concursolutions.com:

- SAP Concur web SSO
- Concur mobile username/password
- Concur mobile SSO

BUSINESS PURPOSE / CLIENT BENEFIT

Deprecating this feature improves login stability and login success rates, while reducing login dependency.

What the User Sees

Users are currently seeing a message on composite login pages about the planned deprecation.

After the composite login feature is deprecated, these users will automatically be redirected to the **Sign In** page, https://www.concursolutions.com/nui/signin, and must use their full user name to sign in. User passwords remain the same.

BEFORE

The **Sign In** page when composite logins are supported.

AFTER

On the new **Sign In** page, users who do not know their full user name can find it using one of the following options:

- Click the **Forgot your user name?** link
- Contact their company administrator

Users will be able to retrieve their user name, without assistance, by clicking the **Forgot your user name?** link on the **Sign In** page.

On the **Forgot User Name** page, the user will enter a valid email address associated with the SAP Concur account, then click the **Send E-mail** button.

If the specified email address is associated with an SAP Concur account, an email will be sent to that address with the full user name included (as Login ID).

If the user chooses to contact their company administrator to get their full user name or if the **Forgot your user name?** option was unsuccessful, the company administrator can look up the user's full user name (visible to admins as in the **CTE Login Name**) and provide it to them.

What the Admin Sees

On the **User Administration** page, under **General Settings**, admins will see the **CTE Login Name** for each user.

NOTE: For future employee imports, include the domain name for users who previously did not have a domain name in the Concur Expense database.

Configuration / Feature Activation

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

Planned Changes Single Sign-On (SSO) Self-Service Option Coming to SAP Concur

These changes are part of the SAP Concur continued commitment to maintaining secure authentication.

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.

SAP Concur is planning to add a Manage Single Sign-On (SSO) feature to SAP Concur products which provides clients with a self-service option for setting up SSO for their organization. SSO is currently supported for Concur Expense, Invoice, Request, and Travel.

The new Manage Single Sign-On (SSO) feature is a replacement tool for clients using existing SSO configuration on the **Security Keys** page and a new tool for clients that now want to implement SSO at their organization. Existing SSO configuration on the **Security Keys** page and the new SSO Self-Service tool will both be available until everyone has migrated to the new SSO Self-Service tool.

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 coming in a future release note.

Planned Changes Forgot Password Feature, Security Questions, and Password Custom Text

These changes are part of the SAP Concur continued commitment to maintaining secure authentication.

Overview

In a future release, SAP Concur will add a new Forgot Password feature to the SAP Concur **Sign In** page, providing an updated experience for users who log in with user name and password credentials.

NOTE: This change does not affect clients that use SSO to log in to SAP Concur.

Currently, depending on a company's configuration, there might be several other options available for the forgotten password process. When the new Forgot Password feature becomes available (targeted for May 11), those additional options will be removed. The additional options that will be removed are as follows:

- **Security Questions:** Users will no longer receive security question prompts for login authentication.

- **On-page text:** Company custom text will no longer display.
- **Password hints:** The option, **Send me an email with my password hint**, will no longer be available.

All of these options are described on the following pages.

NOTE: The new Forgot Password feature is planned for release in advance of the planned New SAP Concur **Sign In** page. For more information, refer to the ***Planned Changes** New SAP Concur Sign In Page* release note in this document.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides greater security for user passwords and streamlines the user experience.

What the User Sees – Current Forgot Password Page and Process

Currently, if a user cannot remember their password and if the user clicks **Forgot your password?** on the SAP Concur **Sign In** page, the **Forgot Password** page displays.

Currently, additional options may be available, depending on the company's configuration. They are:

- The user may have an email sent to a verified email account that includes a password hint.
- The company may require the user to answer a set of security questions prior to getting an email with a link to reset their password.
- The company may also have custom text that displays on this page.

What the User Sees – New Forgot Password Page and Process

With the new feature, if a user cannot remember their password and if the user clicks **Forgot your password?** on the SAP Concur **Sign In** page, the **Forgot Password** page displays.

The user has only ***one*** option – the user will enter their user name and click **Submit**. If an SAP Concur account is found for the specified user name, a reset password email will be sent to the user's associated email address.

The user will open the reset password notification email, which includes a one-time reset password link that is valid for 24 hours. The user will click **Reset Your Password** in the email.

SAP Concur

Hello John Smith,

To reset the password associated with Login ID jsmith, please click on the following button:

Reset Your Password

If the button is not working correctly or is not being displayed, please copy and paste the link below into your browser:
https://www.concursolutions.com/nui/signin/reset/password?lang=en&email=encryptedEmail&token=uuid-123

This link will expire in 24 hours.

If you are experiencing difficulty with this link and require assistance, please contact your program administrator at your company.

Kind Regards, Customer Support Concur Technologies, Inc.

The **Password Reset** page opens in the user's browser.

The company's password policy displays on the page. The user will enter a new password in the **New Password** and **Re-enter New Password** fields. If the passwords do not match, an on-page message alerts the user.

The user can also click **Password Help Info** to view a hint to make passwords stronger.

The user then clicks **Submit** to create the new password.

Once the password is validated, the user will see a message confirming that the new password has been successfully created.

The user will click **OK**. The user will be directed to www.concursolutions.com to log in with the new password.

FAILED PASSWORDS

If the new password fails validation, the **Password Reset** page will display errors to help the user create a password that meets their company requirements.

Feature to be Removed – Password Hint

Currently, in **Profile > Profile Settings > Change Password**, the user can create a password hint. Then, if the user forgets their password and selects the **Send me an email with my password hint** option on the **Forgot Password** page, then an email that includes the hint will be sent to a verified email account.

When the new Forgot Password feature becomes available, this field will be removed from Profile.

Feature to be Removed – Security Questions

Currently, depending on the company's configuration, the company may be able to configure security questions for users who have forgotten their passwords. If so, the Security Question functionality involves three parts:

- Company admin security question configuration
- End user security question configuration
- Security question challenge

SECURITY QUESTION CONFIGURATION

If the company's configuration allows, the **Password Administrator** page is available, which allows the admin to configure the questions. To access the page, the admin clicks **Administration > Company > Company Admin > Password Administrator**.

When the new Forgot Password feature becomes available, this section of the page will be removed.

END-USER CONFIGURATION

Currently, once the admin activates the security questions, the **Password Security Questions** page appears in Profile. It allows users to manage the security questions they will answer if they forget their password. To access the page, the user clicks **Profile > Profile Settings**.

In the **Other Settings** section, the user clicks **Password Security Questions**.

When the new Forgot Password feature becomes available, this page and menu option will be removed.

SECURITY QUESTION CHALLENGE

Currently, once configuration is complete, end users are challenged by security questions before a password reset link is sent out or before a password changed is saved.

When the new Forgot Password feature becomes available, this page will be removed.

Feature to be Removed – Custom Text on the Forgot Password Page

Currently, depending on the company's configuration, the company may be able to provide custom text on the **Forgot Password** page.

If the company's configuration allows, the **Password Administrator** page is available, which allows the admin to define the custom text. To access the page, the admin clicks **Administration > Company > Company Admin > Password Administrator**.

When the new Forgot Password feature becomes available, this section of the page will be removed.

Configuration / Feature Activation / Feature Deprecation

This feature will be automatically available. There are no configuration steps.

Company Administration

Planned Changes SAP Concur Product Access Changes

Overview

Beginning in a future release (targeted for June), clients will access SAP Concur products and services via the following domains:

- *.concursolutions.com
- *.concurcdc.cn

This change is targeted for June 8, 2019.

Please contact appsec@sap.com for any questions regarding this change.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will allow clients to access SAP Concur services in a consistent, secure manner.

Configuration / Feature Activation

SAP Concur recommends clients migrate to one of the domains at their earliest convenience, if they are not already using one of them.

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 be able to start the SSO login process at www.concursolutions.com. 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 (planned for a future release)
- **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.

Training Administration

Planned Changes Optimizing and Relocating the Page

Overview

To simplify the **Training Administration** page, the functionality and content will be changing.

In addition to content changes, access to the **Training Administration** page will move from **Company Admin** to **Tools**.

BUSINESS PURPOSE / CLIENT BENEFIT

These changes will make the Training Administration feature easier to find and use.

Configuration / Feature Activation

The changes will be automatically available; additional information about potential configuration or activation steps will be provided in a later version of these release notes.

📖 For general information about the Training Administration feature, refer to the *Shared: Training Administration Setup Guide*.

Test User Admin

Planned Changes Retiring the Purge Test User Transactions Functionality

Overview

SAP Concur is retiring the functionality in the Test User Admin feature that removes the transactions of test users from Concur Expense, Concur Invoice, Concur Travel, and Concur Request.

BUSINESS PURPOSE / CLIENT BENEFIT

This change will allow SAP Concur to devote more resources to development and maintenance of features that are used by many or most of our clients.

What the Admin Sees

The **Test User Admin** page will no longer display the **Purge Test User Transactions** button.

Before

NOTE: To access the page, click Administration > Expense (or Invoice or Requests) > Test User Admin.

After

Configuration / Feature Activation

The functionality will automatically be removed.

For general information about the Test User Admin feature, refer to the *Shared: Test User Setup Guide*.

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.

SAP Concur Support Case Status

This release might resolve previously submitted support cases. You can check the status of a support case to confirm whether the case issue has been resolved.

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**.

The SAP Concur support page displays.

If the **Contact Support** option is not available in the Help menu, then your company has chosen to support the SAP Concur system internally. Please contact your internal support desk for assistance.

3. In the **Quick Search** field, enter your **Case ID**.
4. Click **Search**. Search results are limited to each company's own cases.

April Example

The table below contains some example cases that are resolved in this release. It is not a comprehensive list of the resolved cases.

Case ID	Description
13229527	**Vendor Manager** Vendor information page with custom connected list field did not open in Vendor Manager.
13231353	**Invoice Pay** Request total did not match payment demand total.
13394522	**Invoice Import** Purchase order import via API was stopped with a “Waiting for PO” message if the supplied PO number did not already exist in Concur Invoice.
13462486	**Purchase Request** If PRs were approved in bulk and automatically transmitted, a PR error could have caused an incorrect PO to be generated.
13512492	**Concur Invoice** Recurring invoices were not created as scheduled.

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**.

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