The presentation will begin shortly. Audio will be streamed directly via your computer speakers. Enjoy the webcast!

SAP Concur
SAP Concur 2018 Mid-Year in Review
A Solution Series Webinar

Trevor Davenport, Carolyn Shaw, Collin Gravalin, Jessica Keehn, Tiffany Redman Kevin Evans & Michael Weingartner
Service Performance & Availability
Michael Weingartner & Kevin Evans
Technical Vision and Strategy

- Stability
- Security
- Architecture
- Enablement
Current State

- There has been an increase in major disruptions this quarter, including an increase in complete outages which have a larger impact on users. This increase in complete outages is due to two distinct areas:
  1. Network router issues
  2. Core database cluster issues
- 100% of complete outages are due to these two areas
- Overall, 60% of major disruptions are due to these two areas
- The network issues have been addressed through the network fabric upgrade and replacement of potentially faulty equipment. There have been no Network issues since May 2nd.
- Core database cluster issues are being addressed through a number of tasks, including upgrades, application improvements, capacity increases, and database scaling.
- As a result of the work that has been completed to-date, we continue to drive down incident resolution times
Review Our KPIs
Performance, reliability, and stability

+20% Transaction volume

↓ 16% Expense report submit times
→ 0% Number of major disruptions
↓ 65% Average time to resolve major disruptions
↓ 65% Total downtime
P1 Disruption

P1 Count

Total Duration (in minutes)
Reliability, Scalability, and Performance Initiatives
Reliability, scalability, and performance

**Investment in infrastructure**
- Network infrastructure
- Database optimization
- Utilizing AWS
- Application containerization
- Microservices

**Simplification and separation**
- Business logic separation
- Authentication service
- Presentation tier
- Memory caching

**Visibility and transparency**
- Personalized Concur Open

**Automation and resiliency**
- Decoupling service dependencies
- Automating the delivery pipeline
- End-to-end team ownership
- Building for resiliency
GDPR
Trevor Davenport
Basics of the REGULATION
What is the GDPR?

The GDPR is an EU Regulation that gives EU residents the right to control the use of personal data about them . . .

. . . and applies to ANY company doing business with them.
Three GDPR domains

End users
(Data subject)

Have the right to:
- Information
- Access
- Rectification
- Erasure
- Restriction of processing
- Data portability
- Object
- Decisions and profiling

Have responsibility for:
- Consent
- Legal obligation
- Vital interest
- Public interest

Our customers
(Controller)

SAP
(Processor)

Has accountability for:
- Privacy impact assessments
- Privacy by design
  - Obscuring data
  - Change logging
  - Access controls
  - Documentation
  - Continuous reinforcement
  - Notification
  - Encryption

Personal and sensitive data

Vital interest

EU and non-EU

Transfer of data

End users
(Data subject)

Our customers
(Controller)

SAP
(Processor)

Personal and sensitive data

Personal and sensitive data

Transfer of data

End users
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Customer Implications
Handling Data Subject Rights

**SAP Concur** provides our customers with tools to meet data subject rights requests.

- Our customers can use the employee profile to **Inform** the employee of what products their data is being used in and for what purpose.

- The admin portal gives our customer the ability to **Access, Rectify, Erase and Restrict** each of their employees personal data. You can also Suspend the user from the portal if they **Object** to processing of their personal data.

- Our reporting tools give the customer the ability to extract employee personal data for **Data Portability**.

- At this time we are not making automated **Decisions** for our customers employees nor **Profiling** them for uses out side of our products. IF this should change with the growth of our products all customers will be informed of what it is and how it works.
SAP Concur & Data Subject Rights
Inform the employee of what products use their data

Purposes of the Processing

SAP Concur stores personal data in its products to enable it to provide the following services to its customers (i.e. the data Controller):

- Travel Reservations and Itineraries
- Expense Report Processing
- Invoice Processing
- Location Tracking Services

All personal data collected is solely used to provide these services.
Access each of their employees personal data.

Data subjects have the right to obtain from the Controller (i.e. their employer) the following:

- Confirmation of whether the Processor (i.e. SAP Concur) is processing their personal data
- Information about the purposes of the processing
- Information about the categories of data being processed
- Information about the categories of recipients with whom the data may be shared
- A copy of the data and information as to the source of that data
- An explanation of the logic involved in any automated processing that has a significant effect on data subjects
Rectify employees personal data.

Data subjects (i.e. employees of SAP Concur’s customer) are entitled to require correction of errors in their personal data.

The User Guide “User Administration” (Shr_UG_User_Admin.PDF) describes the necessary functionality in Concur’s Administration tool allowing either the administrator or the employee (i.e. the data subject) to correct erroneous personal data.

If the administrator makes the corrections they should notify their employee that they have corrected the error(s) and the GDPR rights request is complete.
Erasure of employees personal data. (aka Right to be Forgotten)

Data subjects (i.e. employees of SAP Concur’s customer) are entitled to request

The data subject initiates a request to the Controller,

If the request is determined to be justified by the Controller

There is no waiting period before the RTBF request is processed. Prior to the processing SAP Concur also verifies that there is no reason to block the request (e.g. a legal department hold on the account).
**Data Portability** of data subjects personal data

GDPR legislation provides data subjects (i.e. employees of our customers) with the right to obtain a copy of their personal data in a structured and machine-readable format. Like other rights, the request is made by the data subject (i.e. your employee) to the data Controller (i.e. their employer).

To fulfill the request, the administrator has an “Employee Details” report (standard report catalog) available that will create a copy of the data subject’s personal data profile in a machine readable (.csv) format. For all other travel or expense related personal data, this is information the administrator may provide via additional reporting.
SAP Concur responsibilities

**Personal data** provided by customers must be handled securely.

- We do not use one customer’s data to show examples to another customer
- We secure all transmission of personal data in any communication

**Data Protection** within our products is vital to keeping our customers’ trust.

- As the **Processor** of personal data about our customers’ employees, we have the obligation to keep that data secure and free from processing errors.
- We restrict access to that data to the minimum roles required to support our customers
- We log all changes to **Personal Data** and all access to **Sensitive Data**
- We use a product development lifecycle that is based on **Privacy by Design**
Product & Technology Considerations

Data Retention

• SAP Concur supports the customers ability to determine by policy, the length of time SAP Concur retains their data.

• Minimum retention period supported is two years

Custom Field usage

• SAP Concur strongly recommends our customers DO NOT use custom fields to store Personal or Sensitive data about their employees.

Travel Privacy Agreement Window

• SAP Concur is providing simple and direct access to the latest privacy statement to all clients within the SAP Concur services
Product & Technology Considerations

Concur Mobile

- SAP Concur strongly recommends that Concur Mobile users download the latest version of the app

Sensitive Field Masking

- Certain fields have been masked for security
  - Frequent Flyer/Rental Program Numbers
  - Advantage Membership numbers
  - TSA Secure Flight
  - Passport Numbers
  - Credit Cards

Custom Reports

- SAP Concur strongly recommends that all custom reports be evaluated for sensitive data
Spend Management
Expense, Invoice & Budget
Carolyn Shaw & Collin Gravalin
SAP Concur takes a holistic view of spend management, giving organizations a full view of employee-initiated spend.

We continue to drive innovations across both Concur Expense and Concur Invoice to help companies view, control, and stay in regulatory compliance for all employee-reimbursable spend that is managed through expense reporting and centralized payment spend.
Concur Expense, Concur Invoice and Budget
Upcoming short-term and midterm investments

SAP Concur will make significant investments in architecture and user experience to support our clients and users throughout their journey with SAP Concur, across mobile and web. Our spend management strategy is focused on delivering an integrated, proactive spend management experience across all spend categories. We will also build foundational global tax and rate services that support our clients’ most common use cases.

Globalization – Supporting client’s global expansion through Tax, Digitization and Rates

Client and user onboarding and expansion

Innovate all end-user experiences – web, mobile, other

Deeper SAP Integration

This is the current state of planning and may be changed by SAP at any time.
# Concur Expense

## Product Roadmap overview – key innovations

<table>
<thead>
<tr>
<th>Q2 2018 - Recent Innovations</th>
<th>Planned Q3/2018</th>
<th>Planned Q4/2018</th>
<th>Product Direction</th>
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<td>Missing receipt affidavit □</td>
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1. Potential Data Protection & Privacy features include: Simplified deletion of personal data; reporting of personal data to an identified data subject; restricted access to personal data; masking of personal data; read access logging to special categories of personal data; change logging of personal data; and consent management mechanisms. 2. This is the current state of planning and may be changed by SAP at any time without notice.
Project Timeline

March 2018  
Preview/Early Access

Open participation to all clients who have users who fit into available features

(Every feature will not be completed yet)

Client Planning

Evaluate your needs:
- Communications
- Internal documentation
- Run a pilot group?
- Plan or begin phased rollout?

September 2018  
Opt-In Period

All clients may opt in on their own timeline
- STD: Entire company
- PRO: By individuals, group or entire company

March 29, 2019*  
Planned Mandatory Cutover

All clients who have not yet turned on the NextGen Expense UI will be moved automatically. No employees remain on older UI

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*This is the current state of planning and may be changed by SAP at any time without notice.
NextGen Concur Expense UI is the continued evolution of the SAP Concur user experience.

It is the result of thoughtful design and research that provides a modern, intuitive, and streamlined experience for creating and submitting expense reports.

Users of all types can easily understand what they need to do and how in order to get their expenses done quickly and accurately.
Clean lines to focus the user on tasks needed to submit the report:

- Add expenses
- Add receipts
- Remove alerts
New Expense Page

- Receipt view side-by-side with expense
- Hotel itemization improvements
New Expense Page

- Receipt view side-by-side with expense
- Hotel itemization improvements:
  – Different room rate per night
Expense Administrator Tools
Concur Invoice, and Budget
Product Roadmap overview – key innovations

Q2 2018 - Recent Innovations
- All Spend
  - Data retention compliance tools for GDPR (European Data Governance)
- Invoice
  - E-Bunsho support – Japan*
  - Standard Edition Japan Country Pack
- Budget
  - Budget integration with Request
  - View of unsubmitted transactions
  - Budget stipends
  - Budget adjustments

Planned Q3/2018
- Invoice
  - Create and approve vendor within SAP Concur
  - User Experience Enhancements: New Landing Page, Assign Requests, My Requests*
  - Purchase Request API availability*
- Budget
  - Budget configuration by date ranges

Planned Q4/2018
- All Spend
  - Digitalization – eliminating Paper receipts solution (France)
- Invoice
  - Purchase Order & Goods Receipt Extracts (Standard)
  - SAP Leonardo deeper integration support at header and line item levels
- Budget
  - Budget approval workflow steps

Product Direction
- All Spend
  - Digitalization – eliminating Paper receipts & e-invoicing solution in additional countries
- Invoice
  - Invoice User Experience Transformation
  - Country Pack support for PO Invoices
  - “Real Time” PO Import
  - Vendor Cost Tracking (Standard)
  - Track 1099 Vendors (Standard)
  - Purchase request approval
  - Productized support for Payment Providers
  - SAP Leonardo Employee Extraction
  - SAP Leonardo non-Latin Language support
  - Automating Invoice Capture
- Budget
  - Budget integration with Analytics
  - Budget In-transaction View

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Empower every budget owner to see what’s happening and what’s coming up, and give them the power to do something about it – before it’s too late.
User Experience

Common tasks: Track and improve

Usability assessments

Easy and Intuitive
Invoice Dashboard (Concept)

Highlights
- Concepts of:
  - Call to Action
  - Work to Zero
- Full visibility into unpaid invoices
Vendor Management: Create & Approve a Vendor in SAP Concur (Concept)

Highlights

- New user interface
- Approve vendor in SAP Concur
- Edit approved vendor in SAP Concur
Travel
Jessica Keehn
2018 First Half Developments

Flight – Branded Fare Expansion

Seat Finder powered by Compleat

TripLink – new suppliers

TripLink – TripIt User Interface Enhancements

Locate and Active Monitoring feature availability
Concur Travel Roadmap: Compleat SeatFinder

- Compleat continually looks and finds better seat (Based on Traveler Preferences)
- Traveler enables SeatFinder
- Concur Travel & Compleat Mutual Customer
- Traveler gets best seat possible
- Happy Traveler
## Concur Travel Roadmap: SeatFinder traveler interface

### SELECT SEATS

Select your preferred seats, otherwise Concur will request them for you based on your Profile.

<table>
<thead>
<tr>
<th>Flight</th>
<th>Seat</th>
<th>SeatFinder</th>
</tr>
</thead>
<tbody>
<tr>
<td>AS 286</td>
<td>Economy (T)</td>
<td>Select a seat</td>
</tr>
<tr>
<td>AA 6070</td>
<td>Economy (S)</td>
<td>Select a seat</td>
</tr>
</tbody>
</table>

### SELECT SEATS

Select your preferred seats, otherwise Concur will request them for you based on your Profile.

<table>
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<tr>
<td>AS 286</td>
<td>Economy (T)</td>
<td>21F (change)</td>
</tr>
<tr>
<td>AA 6070</td>
<td>Economy (S)</td>
<td>17D (change)</td>
</tr>
</tbody>
</table>

Seat finder traveler tools on checkout and itinerary pages
Concur Travel Roadmap: SeatFinder notifications and itineraries

Airline: Alaska Airlines

**Flight: 22F**

**Departure:** 05:00 AM  
Seattle, Tacoma Intl Arpt (SEA)  
Duration: 2 hours, 35 minutes  
Nonstop

**Arrival:** 07:36 AM  
Los Angeles Int'l (LAX)  
Terminal: 6

**Confirmation:** TTADLH  
Status: Confirmed

**Seat:** 22F (Confirmed)

**SeatFinder:** On [Edit](#)  
Aisle, Bulkhead  
[Turn off](#)

---

**From:** automation@concurcompleat.com  
**Sent:** Thursday, June 29, 2017 5:03 PM  
**To:** bob@yourcompany.com

**Subject:** GREAT NEWS – We Improved Seat assignments for your upcoming trip to New York - Dallas/Fort Worth - New York on 01 Aug

We have secured an improved seat assignment on one or more of your flights for the upcoming trip to New York - Dallas/Fort Worth - New York on 01 Aug.

Seat assignment changes:
DL 3789  
Seat: 11C
Coming Soon
### Concur Travel Roadmap: branded fare details enhancements

**Lufthansa Economy Flex (Y) | $4,082.25**

#### Services
- **Bags**
  - Checked bag: 1
  - Carry-on bag: 1
- **Seat**
  - Seat assignment
- **Food & Drink**
  - Meal

#### Flexibility
- **Changes**
  - Refundable ticket
  - Changeable ticket
- **Mileage**
  - Eligible for mileage and points

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<thead>
<tr>
<th>Departure</th>
<th>Arrival</th>
<th>Duration</th>
<th>Stop(s)</th>
<th>Airline</th>
<th>Route Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:45a TXL</td>
<td>11:55a LHR</td>
<td>12h 10m</td>
<td>1</td>
<td>Lufthansa 177</td>
<td>View seats</td>
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<td>Seat Details</td>
<td>Frankfurt Int'l Airport</td>
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<td>Airbus A320</td>
<td>84 kg CO2</td>
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<tr>
<th>Checked Bags</th>
<th>Refundable</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>$1,778.25</td>
</tr>
<tr>
<td>1</td>
<td>Yes</td>
<td>$4,082.25</td>
</tr>
<tr>
<td>2</td>
<td>Yes</td>
<td>$6,675.93</td>
</tr>
</tbody>
</table>

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Expanded Hotel Content Direct from Suppliers

Key Features

- TMC and AirBnB content
- Globally addition of more than 50k units
- Business Ready Inventory
- Applies Policy
- Integrated UI
Express Checkout

Express Checkout reduces the checkout process for GDS air bookings from five pages down to two. In addition to the shortened number of pages, several usability and design updates have been introduced.

User will be asked if they wish to use the enhancement.

Reduction in the number of screens needed to check out, improved design and workflow, shorter time-on-task.
TripLink
TripLink: Continued Partner Launch & Expansion
TripIt Pro: Improved traveler experience

Delightful All-in-one view

Smart Segment Details

Productivity Tools

Actionable Alerts
Concur Locate
Locate + Active Monitoring - roadmap

Concur mobile app messaging

New location data
- Expense transactions
- User location data (student registries)

All affected employee notifications

Company-defined risk content and levels
- Risk content for Concur Request, Concur Travel, and so on

Next phase of the Concur Locate user experience
- Link to risk messaging platform
- Configuration of business rules
- Incident management
Locate + Active Monitoring - roadmap

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- Link to risk messaging platform
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- Incident management
Intelligence
Tiffany Redman
Data Platform and Analytics Portfolio

SAP Concur’s data platform and analytics portfolio is designed to make it easier for our clients to make timely, actionable decisions on your spend practices around the global
Data Platform and Analytics

Data Platform and Analytics will be focused on delivering the next generation of our analytics solution and expanding the data available within SAP Concur’s product suite while also improving data quality, access, and consumable data services. We will also support feature enhancement on our existing platform until all clients are able to migrate to the new platform. The data platform is the backbone of all SAP Concur reporting solutions and continues to improve the insights clients can glean from existing and future reporting tools.

Next Generation Analytics for Real Time Data & Insights

- Improved data quality and access
- Intelligence global expansion

This is the current state of planning and may be changed by SAP at any time.
Expanded global intelligence support

- Language localization
- Additional reporting support for core & new products
- Global & regulatory alignment
Localization Changes

Support for additional languages in reports, the data model, and archive.

- Bulgarian
- Croatian
- Danish
- Finnish
- French Canadian
- Hungarian
- Norwegian
- Polish
- Romanian
- Russian
- Slovak
- Turkish
Enable Additional Languages

1. Within Concur, click Administration > Expense (or Invoice or Requests)
2. Click Localization (left menu). The Localization page appears
3. You can review the localization status for each supported language, by localization category. Once a category is selected, you can update the items in it.
Expanded invoice reporting catalog

Capture Service Summary

Can be used to view the number and type of changes that occur after an invoice is created and before the final approval of the invoice.

The Capture Service Summary report can help provide insight into your organization's current invoice processes.

Clicking a field in the Change Type column on the report opens the Capture Service Details report for the selected field.
Expanded invoice reporting catalog

Capture Service Details

Can be used to view the details of the Capture Service fields on the Capture Service Summary report (Invoice Number, Invoice Date, Vendor, Shipping, Tax, Currency, Invoice Amount, and PO).

Can be run as a drill through report from Capture Service Summary. Or run independently.

<table>
<thead>
<tr>
<th>Request Name</th>
<th>Request ID</th>
<th>Task Steps</th>
<th>Captured Value</th>
<th>Processed Value</th>
<th>Data Source</th>
</tr>
</thead>
<tbody>
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<td>D51FBED080C8456E5B</td>
<td>222222</td>
<td></td>
<td></td>
<td>ICL</td>
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<tr>
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<td></td>
<td>123456</td>
<td>ICL</td>
</tr>
<tr>
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<td>1</td>
<td></td>
<td></td>
<td>ICL</td>
</tr>
</tbody>
</table>
**Expanded invoice reporting catalog**

**Received Accrual by Line Item**

Can be used to view all goods received and the invoice line items that have not been assigned to a payment request or have been assigned to a payment request that has not yet been paid.

The report provides financial professionals within the organization visibility into outstanding liabilities and potential future cash requirements.

![Capture Service Details](image)
Japanese market specific reports
Expense Entries for Companies Using Electronic Receipts

This report can be used for the National Tax Agency (NTA) investigations to search the details of expense entries.
Japanese market specific reports
Invoice Entries for Companies Using Electronic Receipts

This report can be used for the National Tax Agency (NTA) investigations to search the details of invoice line items.
Japanese market specific reports
IC Card Utilization Rate

The IC Card Utilization Rate is a summary report which provides the registration rates, and utilization rates for Japanese IC Cards, or prepaid transportation cards.

The IC Card Utilization Rate report can help determine the degree of governance and business efficiency for the IC Card usage.

This report will support the new Japan Public Transportation feature at a later date.

Summary Metrics Include:

- Number of IC Card Registrants by Company
- Registration Rate by period
- Number of IC Card Registrants by Division
- Total Utilization Rate by payment type and period
Japanese market specific reports
Receipt Received Rate

The Receipt Received Rate is a summary report which assists in verifying whether employees attached receipts.

This report can also help clients in the Japanese market evaluate the introduction of e-Bunsho timestamps and the e-Bunsho operation status after introducing e-Bunsho.

Summary Metrics Include:

- Total number of receipts received
- Received Rate by Expense Type & Employee
- Number of expense entries without a receipt associated
Japanese market specific reports
Receipt Viewed Rate

The Receipt Viewed Rate is a summary report which provide the number of receipts viewed by the approver.

This can assists in verifying whether employees attached receipts.

This report can also help clients in the Japanese market evaluate the introduction of e-Bunsho timestamps and the e-Bunsho operation status after introducing e-Bunsho.

Summary Metrics Include:

- Total number of receipts viewed by approver by workflow step
- Number of expense entries without a receipt associated
Japanese market specific reports

Ticket Issue Date and Airfare Analysis

This report shows both summary and detail data capturing how many days before departure air tickets were issued and the average price of issued tickets.

This can also help clients identify how to reduce the cost of air tickets, so may have benefits outside of the Japanese markets.
Japanese market specific reports

Unpaid and Unassigned Expenses

This report lists expenses that have not been approved or paid. This report can help...

- identify expected expense amounts
- match bills from travel agencies with corresponding data within SAP Concur
The Vendor Amount Ranking is a summary report that can help clients analyze whether purchasing is concentrated on specific vendors.

This report provides:

- bar graph of the results
- table listing the top ranking vendors based on the Total Approved field
- Monthly approved purchased amounts for vendors by expense type
Questions?