Welcome to
SAP Concur

New Admin Kit

Welcome

At SAP Concur we like to dream big and think about how we can help your organisation control spend, compliance and duty of care, so you can focus your time on other things. We are excited to help you create an environment where your employees are more productive, both in the office and whilst travelling, and focus on the real business at hand.

As you get set up, you'll have a dedicated SAP Concur team partnering with you every step of the journey – from implementation onward – to ensure success. We want to make sure you see great value and impact from our partnership.

To help, we'll provide you with the resources, support and insight that you need to achieve your business goals.

We know there's a lot to think about. Depending on which issues you are looking to solve, a solid change management strategy is key. This will help set you up for a success – both for the project team and users. We will help you with this.

If you have questions or problems along the way, or have ideas on how we can improve, don't be afraid to let us know. We want to hear what you're thinking.

Thanks for choosing SAP Concur. Here's to a future without spreadsheets and piles of receipts!

Here's Your Map to Success

We talked to the people who do this best, including some of your most successful peers.
We compiled their advice in this guide and uncovered the nuts and bolts of what you need to know. Soon, you'll be on your way to a smooth transition into an Administrator role.
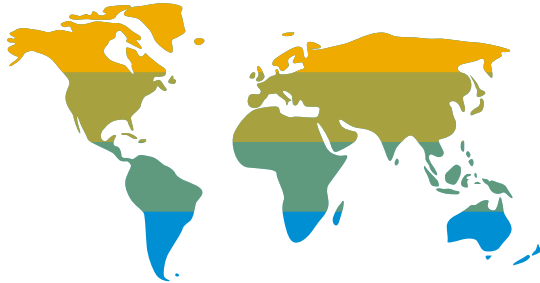
Congrats, You're an Admin Now

We're here to help make the transition a smooth one. This New Admin Kit is for you—whether you had weeks of preparation and training or only minutes!

Understand what an Administrator can do...

In addition to becoming an ASC (Authorized Support Contact), many Administrators of SAP Concur take on a broad mix of responsibilities related to their organisation's travel and expense programs. You may need to find answers or learn how to do any number of common tasks:

- Managing expense approvals, audits, pulling invoices and reviewing details of billing to validate charges.
- Setting up new users and managing access.
- Updating configuration and policy rules.
- Supporting your employees with training and providing answers to common questions.
- Managing and analysing reports generated from SAP Concur.
- Submitting cases with Customer Support and working through resolution of problems (ASC).

What is an ASC?

An Authorized Support Contact (ASC) is one of up to five people designated to access the Support Portal, contact Customer Support via phone or chat and open cases with our support team.

If your predecessor is still around, use the **Admin Knowledge Transfer Guide** to help you capture important items for future reference. If not, the next page provides a checklist to get you started.

Here's Where to Start

Is your organisation's Admin no longer available to get you started? No problem!

Ensure Your Permissions Match Your Predecessor's
Confirm your ASC permission if you'll be contacting **Customer Support**.

If You've Never Been an Administrator Before
Familiarise yourself with the **Training Toolkit** and review the **Learn to Administer** section.

Check Out the Self Help Available to You
There are resources to help you—**page 12** highlights a few of the best.

Understand the SAP Concur Services Your Organisation has Purchased
If you have questions about the services your organisation has access to,
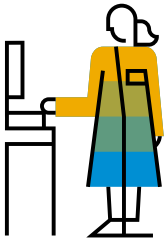refer to the Order Form or contact your SAP Concur Account Team for help.

Remember That Support is Available
But first review **page 14** to help you get the most from Customer Support.

There's a lot of valuable information in this document, but if you're looking for something specific, click **Ctrl F** and search for the item or term you need.

SAP Concur is Here to Help

Customer Support
- Upon Transition to Support this is your first stop for all product questions, technical questions and configuration changes.
- Assists up to five individuals who you've designated as Authorized Support Contacts (ASCs).

Client Sales
- Stays engaged through the life of your SAP Concur contract.
- Recommends services and works with Client Development to ensure your solution continues to meet your business needs as they grow and change.

Client Development
- The focal point for you to achieve success in your partnership with SAP Concur.
- Offers valuable perspectives and insights that help you optimise your program.
- Provides recommendations to ensure that our partnership continues to meet your needs as your business grows.

Services
- User Support Desk service provides 24x7 assistance for end users.
- Service Administration provides guidance on best practices and product updates.

Learning the Basics

New to SAP Concur? Your first step should be getting familiar with navigating the solution.

The Training Toolkit **is a great place to start if you need to quickly get oriented and understand how your employees will be using SAP Concur.**

Check out the **Learn the Basics** section.

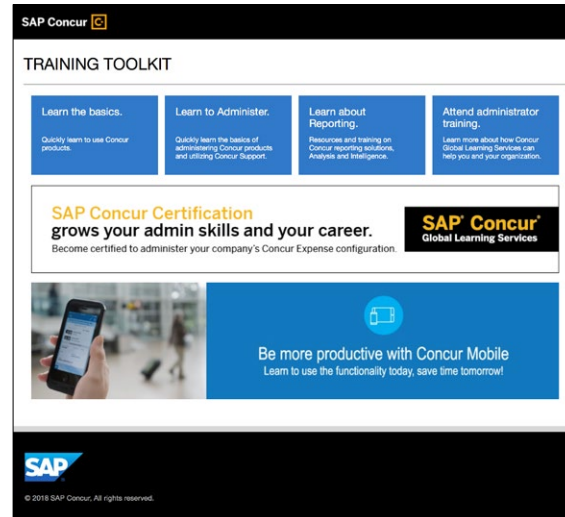**Pay Special Attention to:**
Getting Started Guide.
Demonstration of Concur Travel and Expense.

New to Concur Expense?
Review the **Concur Expense QuickStart Guide**.

New to Concur Travel?
Review the **Concur Travel QuickStart Guide**.

Tailor your training documents and communications to reflect your SAP Concur instance and your company culture. This will make it more relevant to your employees and typically helps with adoption.

Expense 101

Prepare to handle core administrative tasks. Here are a few helpful tools to get started and get smarter.

If you're not the Expense Administrator, skip ahead.
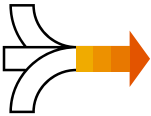
Getting Started
Learn to Administer
A collection of detailed training videos and other resources covering specific administrator tasks.

Administrator User Guide
A comprehensive guide to administering common tasks, from user permissions to changing passwords.

Customer Learning Series
Access live and recorded, instructor-led webcast training focused on administration and configuration topics.

Additional Training
In case you need to train additional users or drive stronger adoption, here are some resources to help you prepare to train your employees.

Develop a Training Approach
Develop an approach that includes training methods, delivery, curriculum and how to locate resources.

End User Library
A collection of short guides and training videos to help your employees perform common tasks.

Have a backup contact to support end users when you're not available. Create an email alias strictly for internal support of user questions (e.g., concur@yourcompany.com).

Travel 101

If you are the Travel Administrator and your organisation has purchased Concur Travel directly from SAP Concur, this page is for you!
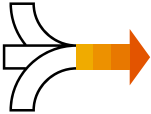
Getting Started
Get started here with guides and resources that introduce Concur Travel to Administrators.

Travel Administration
Useful technical documentation on administering Concur Travel and how it works.

Travel Service Guides & Fact Sheets
Detailed information on specific features available in Concur Travel.

Travel Reporting User Guide
Listing of real-time travel reports in SAP Concur, complete with descriptions.

Additional Training
Travel specific training materials and courses are available for Administrators, as well as your end users.

- **Travel**
- **TripLink**
- **Mobile**
- **Feature a Feature**

Make sure to register for SAP Concur's ongoing **Travel Training** which includes live feature-specific webinars and recorded sessions. They cover topics like:

- Travel administration training
- Travel rules workshops
- Release notes review

⚠ If you have purchased Concur Travel through your Travel Management Company (TMC), **skip this page**.

Reporting 101

Solve your business problems, control costs and more effectively manage your expense and travel programs with detailed, actionable reports.
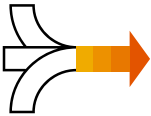
Getting Started
The best place to learn more about reporting is on the **SAP Concur Training** website. Select the guides and online training sessions that are appropriate for the level of service you have.*

*Unsure about the level of service you have? To determine which reporting service you have, log in to Concur Travel and Expense and click the Reporting menu. The menu will display either Analysis or Intelligence.

Additional Training
Looking to improve your program?

Start with a quick **Reporting Optimisation Guide** that highlights key metrics and common reports you can use. Answers common questions like:

• Which reports should I be using?

• What should I be looking for?

• How to improve?

Consultative Intelligence can transform your need for knowledge into Intelligence reports customised for your business. Contact your SAP Concur account team to learn more. Looking for greater visibility into your organisation's overall travel and expense spend and other data? Learn how some of SAP Concur's **Extended Services** can help.
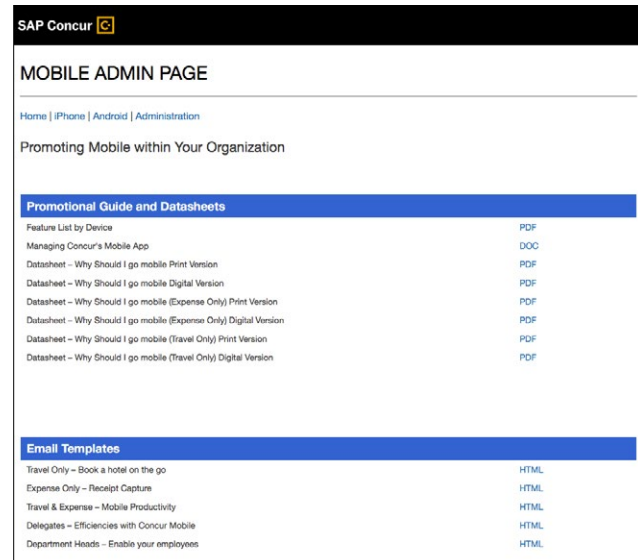
Go Mobile With SAP Concur

Everyone is working while on the go these days. Let's make sure you are ready to administer SAP Concur for mobile.

The SAP Concur Mobile Admin page is full of great information and resources to help you communicate and help your organisation use the SAP Concur Mobile app.

The SAP Concur mobile app is available for iPhone/iPad and Android operating systems. Features and functionality vary by platform. Materials to give your end users related to the SAP Concur Mobile app are found here.

ExpenseIt brings the convenience of mobile to life—capture and turn receipt images into expense line items straight from your smartphone! Contact your SAP Concur account team to learn more.

Train Yourself

You'll want to have the right tools so you're set up for success. Here are a few links to get you there.

Concur Support Portal
While logged into SAP Concur, select Contact Support under the Help menu to get to the Concur Support Portal. The Support Portal includes our **Knowledge Base**, limited **Chat Support**, **Technical Documentation** and more. We highly recommend looking through the **Knowledge Base** before contacting Support. If you still have questions, **Create A Case** on the Support Portal and Customer Support will come tothe rescue. (Use Global Search to find what you need.)

Help
You can always find the dropdown Help button in the upper right corner of your screen while logged into SAP Concur.

SAP Concur Training Website
Head over to your **Training Toolkit** for a collection of live and recorded **online classes** to get you up to speed or keep your skills sharp. You'll also find lots of documents to help you with specific questions too!

Release Notes
SAP Concur releases features and improvements each month, so stay current on your monthly product release notes. Administrator summaries are available **here**.

We put a lot of info into a single document. If you're feeling overwhelmed while using any of the resources above, click **Ctrl F** and search for the item or term you need.

...Or Let Us Train You

SAP Concur offers a full range of customised training services to support your needs. Email training@concur.com for additional training support.

Customised Demonstrations & Materials

Custom demonstrations provide visual steps for the most important and common tasks.

Customised training materials can be localised into any language the product supports for your global needs.
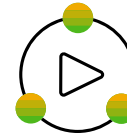
SAP Concur Certification
Professional Certification
demonstrates you have the expertise needed to be granted unrestricted configuration access to your company site—without going through customer support.

This will also grow your career!

On-site & Virtual Instructor-led Training

Instructor-led training session based on topics you select. You choose the subjects that would most benefit you and your employees. Topics range from covering the basics (for end users and admins) to restricted configuration training.

Visit our Learning Services page and complete the interest form, or send us an email at training@concur.com. We'll contact you right away to discuss your training needs and provide a quote.

Help Us Help You

As a new ASC, you're not on your own.

Watch the **Getting the Most from Concur Customer Support** video, in the Concur Support Portal > Resources > Webinars. This required video discusses the three channels for connecting with Customer Support.

Read the **Getting the Most from Concur Customer Support** for how to best use Customer Support for key tasks.

Review the **How to Navigate the Concur Support Portal** guide and learn about the Knowledge Base, Chat Support and more.

How to Successfully Submit a Case

- Take screen shots of issues you encounter.
- Document step-by-step details of what was done leading up to the issue.
- Note the name and login ID of who experienced the issue.
- Provide browser and version info.

Want More Help?
Attend a "Resources for New Admins" training available through the **Customer Learning Series** (or view a recording).

Performance Matters

Concur Open—Service Status Dashboard

Find the most updated information on service availability with Concur Open, our **Service Status Dashboard**. Concur Open provides visibility into any known, widespread performance issues or outages. Check Concur Open before reaching out to Customer Support with questions, and you can also subscribe to updates.

Communicate to your end users or provide the link to Concur Open so they can track the status themselves.

Let's Keep in Touch

We'll be your partners along the way, so we thought you should know how to stay in touch.

Connect with us and with your peers

News + Webinars
Watch for our quarterly newsletter, **Insights from SAP Concur**, with tips and updates, as well as invitations to relevant **Solution Series** client webinars.

User Groups
Organised with Client Development, **user groups** provide an ongoing network to share best practices and ask questions.

SAP Concur Community
Discuss with thousands of your peers in our client-only group to connect, share and collaborate. **Join today!**

Let us know what you think

Solution Suggestions
Have a product enhancement idea? Submit and vote on solution suggestions in the Support Portal to help us create the best solution for our customers.

Surveys
From time to time, we'll ask you to provide feedback via surveys. Please use these opportunities! We take action on survey feedback to improve implementation, communication, support and client satisfaction.

Customer Experience
At SAP Concur, customers come first. We listen to you and learn how we can improve our products and service so your experience keeps getting better. Learn more and provide feedback on our **webpage.**

Connect, Collaborate and Inspire

**Join your peers, partners, and experts to optimise your programs
at SAP Concur Fusion.**

SAP Concur
Fusion

Fusion, SAP Concur's premier, four-day
customer conference, includes:

• Education sessions.

• Product trainings and demonstrations.

• Personalised consulting sessions.

• Connections with peers.

• Executive keynotes highlighting SAP
  Concur's roadmaps.

SAP Concur
Fusion Exchange

The Fusion Exchange series brings SAP
Concur expertise to cities across the United
States, Canada and the world. These free, one-
day events are hosted throughout the year and
give you a chance to arm yourself with ways to
optimise SAP Concur and learn about:

Fusion is often found to be the most valuable resource to Admins! We've heard over and over
how much attendees learn and about the many insights captured in such a short and dynamic
period of time.

Future Proof Your Business

SAP Concur has built an ecosystem of partner apps that make the journey smoother for your business travelers, while giving you increased visibility into travel bookings, better control over spend and enhanced ability to manage compliance.

Popular Apps for Your End Users

Uber

TripIt

SpotHero

Popular App Categories

Tax Management

Fraud, Compliance & Risk

Financial & ERPs

Consider the Possibilities

Bring out the best from SAP Concur, and while you're at it, check out what else you can do.

Consider Adding on These Services:

Service Administration
Maximise your investment with a primary point of contact backed by a team of consultants to help you with your post-deployment needs.

User Support Desk
Provide your users with support directly from SAP Concur, and free yourself up for more strategic tasks.

Audit Service
Ensure compliance with your travel and expense policies by verifying receipts and expense reports.

Expense and Invoice Pay
Automatically reimburse employees and make remittances to supported corporate card providers.

Intelligence
Organise and get insight into your travel, TMC, ERP, invoice and credit card data.

Concur Invoice
Automate and connect invoice processes to get visibility into how your team is spending.

Concur Travel
Simplify travel booking and reduce costs.

ExpenseIt
Capture and turn receipt images into expense line items on your smartphone.

TripLink
Gain visibility and control into all travel transactions.

Concur Locate
Ensure you're meeting your Duty of Care obligation with a solution that monitors, locates, communicates and deploys assistance to all at-risk employees, whether they're traveling or not.

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