

PUBLIC

Client Guide

Concur Essential Care

Concur Essential Care team:

- Helps you manage your company's existing configuration of SAP Concur
- Keeps you informed about new solutions that will benefit your company
- Assists you with administrative system maintenance

Working with your Concur Essential Care team

The best way to connect with the team is to open a support case (via the Concur Support Portal) and check the **Expertise & Care** box. Your case will then be triaged and routed to the appropriate team. The team members are available Monday through Friday during business hours.

Solution coverage

The service will support Concur Expense, Concur Travel, Company Bill Statements, Concur Request and Concur Invoice, based on what your company has purchased.

Service overview

Ongoing strategic guidance

- Address initial and ongoing business requirements in your current production environment
- Act as your internal advocate on issues that need to be addressed by other teams within Concur

Review SAP Concur solutions updates

Review monthly release notes via the release notes group webinar

Assistance with administrative tasks

The Concur Essential Care team acts as an extension and partner of your own administration team. Your administration team is ultimately responsible for administrative decisions for your site. The team can:

- Assist with data imports
- Add or update employee roles and permissions for individual users
- Assist with assigning, or un-assigning single corporate cards
- Add, modify, or delete company locations
- Add, update, and remove company notes and travel info sections
- Update travel discounts and vendor preferences
- Add/Modify additional employee custom fields, as applicable

Configuration changes related to existing policies

- Create, modify, or delete audit rules and exceptions
- Activate or deactivate receipt rules
- Activate or deactivate expense types
- Edit how users can add or configure attendees for each expense type
- Change form assignments to expense types
- Update e-mail reminders
- Assist in updates to forms including configurable fields, text, and lists
- Assist with updates to lists in list management
- Update site settings
- Adjust travel policy rule classes, approvals, and rules including:
 - Adding/creating new rules
 - Removing existing rules
 - Updating criteria for existing rules
 - NOTE: This does not include major reconstruction of travel rule classes or assigning users to travel rule classes, which should be done through employee data loads
- Adjust travel rule compliance level
- Activate features available within the core product offering
 - NOTE: Features that require a project need to be purchased and managed by other Concur teams. This applies to features listed under 'Tasks not managed by Concur Essential Care'
- Edit general policy settings such as the report header form, allocation form, and workflow assigned
- Maintain existing workflow settings and steps (edit or delete)
- Configure payment methods or company card configuration
- Requests that are greater than 4 hours require the client to engage with additional Concur resources, which could result in additional charges

Language support

Concur Essential Care is provided in English globally. Spanish, French, Japanese, German, Mandarin and Portuguese (Brazil) support is available in limited markets and regions (provided that support tasks routed to other teams within SAP Concur maybe worked in English).

Tasks not managed by Concur Essential Care

- Making configuration changes that:
 - Require a project where strict adherence to a timeline for the launch date of a feature or parameters and milestones that need additional implementation resources
 - Cover expansion to new countries or regions not already supported by your configuration; this includes adding users from countries that are not yet supported in the system
 - Pertain to profile and finishing templates
- Supporting other core products that are not covered under your contract

- Answering questions regarding the business relationship with Concur (i.e. billing, pricing, invoices – please refer to your Client Executive or Client Success Partner (CSP) for these topics)
- Updating more than 20 account codes per request or setting up a new account code hierarchy
- Setting up a new, modifying or supporting existing Travel Allowance and Tax (VAT, GST) Configuration
- Creating a new connected list
- Issuing cash advances or maintaining employee cash advance balances
- Managing, processing, auditing receipts and/ or expense reports. Approving or booking travel.
- Reconciling Expense Pay
- Creating, editing, or modifying Third Party Meetings
- Configuring or liaising with other teams on Third Party Connectors (ICS and others)
- Report and dashboard creation or modification, App Center, Audit, Web Services, End user cases

Your responsibilities

You are responsible for the following activities:

- Provide an overview and any documentation of your configuration(s), deployment, and process models to bring the Concur Essential Care team up to speed
- Provide TMC (Travel Agency) contact information.
- Negotiate travel vendor discounts.
- Monitor business processes, identify pain points or desired changes, and request specific changes when required. Consider how business changes may affect your Concur configuration.
- Log cases in Concur Support portal (prioritize when submitting multiple incidents). Provide written approval for testing and for any configuration changes in your Concur platform
- Respond to requests for additional details and data on incidents
- Provide training, end user assistance and knowledge transfer, or site audit information to your company resources as needed
- Create and/or update end user documentation, client documentation, or design documents
- Develop and own your company's written travel policy
- Complete any data load templates
- Provide the exact text of messages to users, including any required translations