

PUBLIC

Client Guide

Concur Select Care

Concur Select Care provides you with the highest level of engagement via a designated Select Care Manager and team of consultants. Your Concur Select Care Manager and team of consultants will support you in optimally planning and running your business, achieving your goals, and fully unlocking the value of your SAP Concur solution.

Concur Select Care team:

- Tailored, strategic, and proactive engagement model driven by business priorities and key milestones
- Facilitate access to SAP Concur core product and functional experts
- Bi-annual Product roadmap presentation covering planned enhancements to the Concur product portfolio
- Annual Interactive Site Workshop of your Travel (Direct), Expense, and/or Invoice configuration
- Case management and trend analysis for proactive risk mitigation
- Partners with you in managing the configuration of SAP Concur solution
- Enhanced contractual service level agreement for support cases

Working with your Concur Select Care manager

Gain the full power of SAP Concur with personalized engagement and ongoing collaboration with your designated Concur Select Care Manager. The best way to connect with your designated Concur Select Care team is to open a support case (via the Concur Support Portal) and check the **Expertise & Care** box. Your case will be triaged and routed to either your designated Select Care Team or SAP Concur Support based on the issue. Your Select Care resource(s) are available Monday through Friday during business hours.

Solution coverage

The service supports Concur Expense, Concur Travel (Direct), Company Bill Statements, Concur Request, Concur Invoice.

Service overview

Ongoing strategic guidance

- Address initial and ongoing business requirements in your current production environment.
- Gain the full power of SAP Concur with personalized engagement and ongoing collaboration
- **Concur Select Care** is centered around your designated **Select Care Manager**, who orchestrates a strategic and proactive approach for:
 - Collaboration
 - Value Realization
 - Empowerment



- Consultative approach to operations and delivery
- Act as your internal advocate on issues that need to be addressed by other teams within SAP Concur

Review SAP Concur solutions updates

- Monthly Release Notes consultation
- Answer questions and help you understand which features you may want to leverage

Assistance with administrative tasks

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

- Assist with data imports
- Assist with updating employee roles and permissions for individual users
- Provide guidance on assigning or unassigning 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
- Modify additional employee custom fields, as applicable

Configuration changes related to existing policies

- Create, modify, or delete audit rules and exceptions.
- Add, modify, or delete custom text
- 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 up to 20 account codes (per request)
- 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
- 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 SAP Concur resources, which could result in additional charges

Tasks not managed by Concur Select Care

- Making configuration changes that:
 - Require a project where there are strict adherence to a timeline for a launch date of a feature or parameters and milestones that need additional implementation resources
 - 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
- Performing any work that pertains to Concur report creation or design
- Answering questions regarding the business relationship with SAP Concur (i.e. billing, pricing, invoices – please refer to your Client Executive or Customer Success Partner (CSP) for these topics)
- Leading project teams from either your side or the SAP Concur side
- Providing end user assistance
- Managing, processing, auditing receipts and/ or expense reports. Approving or booking travel.
- 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
- Issuing cash advances or maintaining employee cash advance balances
- Reconciling Expense Pay
- Creating, editing, or modifying Third Party Meetings
- Setup, configuration and liaising to other teams on Third Party Connectors (ICS and others)
- Report and dashboard creation or modification, App Center, Audit, Web Services, End user cases

Language support

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

Your responsibilities

You are responsible for the following activities:

- Designate up to five Authorized Support Contacts to partner with Concur Select Care. Other contacts may be involved in the business practices and decision-making process
- Provide an overview and any documentation of your configuration(s), deployment, and process models to bring Concur Select Care 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.
- Provide information, data decision and approval as required for SAP Concur to deliver services requested
- 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
- Providing the exact text of messages to users, including any required translations