

PUBLIC

Client Guide

Concur Advanced Care

Where do you want your travel and spend program to go? We'll help you get there.

Concur Advance Care consulting engagement helps optimize the adoption of the SAP Concur platform and solution for your organization.

Advanced Care:

- Helps you manage your company's configuration of SAP Concur
- Discuss best practices that will provide value to your company
- Assists you with administrative system maintenance
- Partners with you to plan for initiatives that impact your T&E program
- Two regularly scheduled phone calls per month to discuss your configuration and cases
- Annual Site Workshop of either your Travel or Expense configuration

Working with your Concur Advanced Care designated consultant

The best way to connect with your designated consultant is to open a support case (via the Concur Support Portal) and check the **Expertise and Care** box. Your case will then be triaged and routed to either your designated consultant or SAP Concur Support based on the issue. Your designated consultant is 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
- Review best practices when requested

Review SAP Concur solutions updates

- Monthly release notes group call and consultation
- Answer questions and help you understand which features you may want to leverage after attending our group release notes call

Assistance with administrative tasks

Concur Advanced Care acts as an extension and partner of your own administration team. Your administration team is ultimately responsible for administrative decisions for your site. Your Concur Advanced Care Consultant 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
- 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
 - 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 Advanced 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 Advanced Care is provided in English globally. Spanish, French, Japanese, German, and Mandarin 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 Advanced 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 Concur Advanced 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
- 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