

SAP Concur 

# Welcome to SAP Concur Solutions

New Admin Kit  
Professional Edition

THE BEST RUN



# Let's Get Started

**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.

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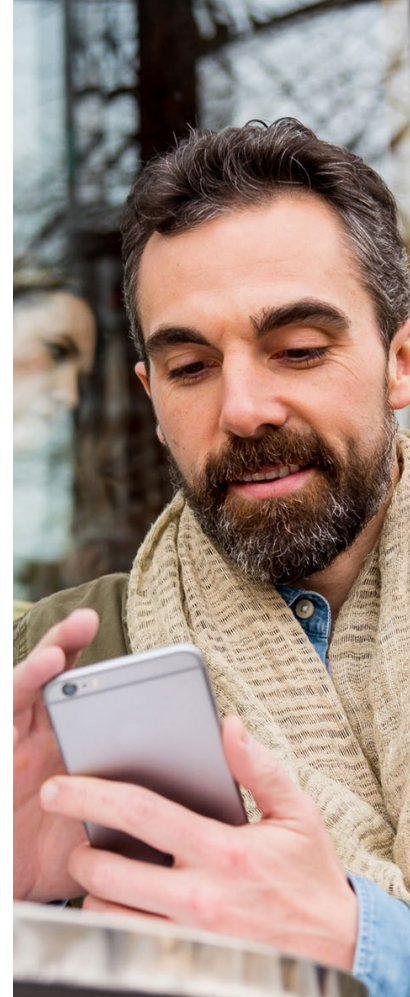
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# Congrats, You're an Admin Now

We're here to help make the transition a smooth one.

## Understand What an Administrator Can Do...

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

- 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 analyzing reports generated from SAP Concur solutions.
- Submitting cases with SAP® Concur® 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 SAP Concur 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 Your Checklist

Is your organization'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 [SAP Concur Support](#).



## If You've Never Been an Administrator Before

Familiarize yourself with the [Training Toolkit](#).



## Check Out the Self Help Available to You

There are resources to help you—[page 11](#) highlights a few of the best.



## Understand the SAP Concur Solution Services Your Organization has Purchased

If you have questions about the services your organization has access to, refer to the Order Form or contact your Customer Success Partner for help.



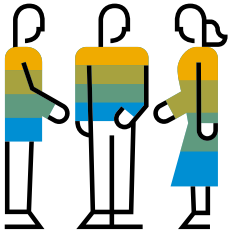
## Remember That Support Is Available

But first review [page 13](#) to help you get the most from SAP Concur 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.

# Meet Your SAP Concur Solutions Team



## SAP Concur 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).

## Customer Sales

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

## Customer Success

- The focal point for you to achieve success in your partnership with SAP Concur solutions.
- Offers valuable perspectives and insights that help you optimize 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.

# SAP Concur Solutions 101

## Learning the basics

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 solutions.

Check out the [Learn the Basics](#) section.

### Pay Special Attention to:



[Getting Started Guide.](#)

### New to Concur Expense?

Review the [Concur® Expense QuickStart Guide.](#)

### New to Concur Travel?

Review the [Concur® Travel QuickStart Guide.](#)

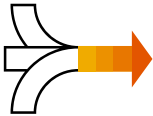


**Tailor your training documents and communications** to reflect your SAP Concur solutions instance and your company culture. This will make it more relevant to your employees and typically helps with adoption.

# 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.

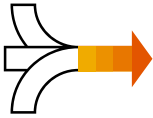


**Have a backup contact** to support end users when you're not available. Create an email alias strictly for internal support of user questions (e.g., [concur@yourcompany.com](mailto:concur@yourcompany.com)).

# Travel 101

If you are the Travel Administrator and your organization has purchased Concur Travel directly from SAP Concur solutions, this page is for you!

If you have purchased Concur Travel through your Travel Management Company (TMC), [skip this page](#).



## Getting Started

Get started with guides and resources that introduce Concur Travel to Administrators [here](#).

### [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 solutions, complete with descriptions.



## Additional Training

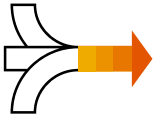
Travel specific training materials and courses are available for Administrators, as well as your end users.

- [Travel](#)
- [TripLink](#)



# 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 Solutions 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 & 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 Optimization 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** customized for your business.

Contact your SAP Concur solutions account team to learn more.

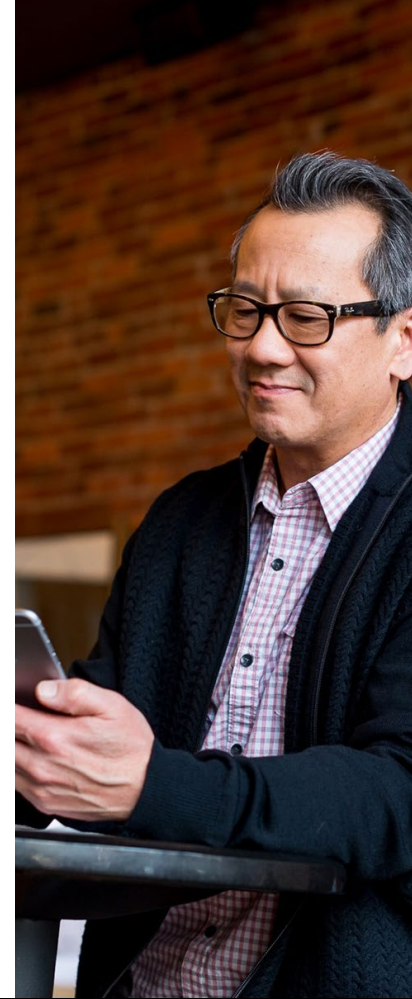
# Go Mobile With SAP Concur Solutions

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

The [SAP Concur Mobile Admin](#) page is full of great information and resources to help you communicate and help your organization 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](#).

[Expenselt](#) brings the convenience of mobile to life—capture and turn receipt images into expense line items straight from your smartphone! Contact your SAP Concur solutions 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.



## [SAP Concur Support Portal](#)

While logged into SAP Concur solutions, select **Contact Support** under the Help menu to get to the SAP Concur Support Portal. The SAP Concur Support Portal includes our **Knowledge Base**, limited **Chat Support**, **Technical Documentation**, and more. We highly recommend looking through the Knowledge Base before contacting SAP Concur Support. If you still have questions, **Create A Case** on the SAP Concur Support Portal and SAP Concur Support will come to the 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 solutions.

## SAP Concur Solutions 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 solutions offer a full range of customized training services to support your needs. Email [training@concur.com](mailto:training@concur.com) for additional training support.



## Customized Demonstrations & Materials

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

Customized training materials can be localized into any language the product supports for your global needs.

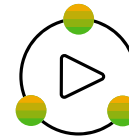


## SAP Concur Certification

### [Professional Certification](#)

demonstrates you have the expertise needed to be granted unrestricted configuration access to your company site—without going through SAP Concur 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.

# Help Us Help You

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

The [SAP Concur Training Library](#) has the below resources and many others.



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



Watch the video **Getting the Most from SAP Concur Support** to see how to best use SAP Concur Support for key tasks.



Review the **How to Navigate the SAP 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.

# 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 SAP Concur Support with questions, and you can also subscribe to updates.

Service	Current Status	Jan 29	Jan 28	Jan 27	Jan 26	Jan 25	Jan 24	Jan 23	Jan 22
Expense									
Travel									
Invoice									
Request									
Imaging									
Analysis/Intelligence									
Mobile									

Operating Normally Outage Partial Outage Performance Issue Partial Performance Issue



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

# Contacts

Let's keep in touch. We'll continue to partner along the way, so here's how to stay in touch.

## Connect with us and with your peers

### News + Webinars

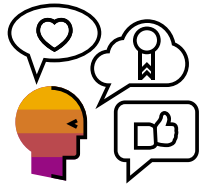
Watch for our quarterly newsletter, [Insights from SAP Concur solutions](#), with tips and updates, as well as invitations to relevant [Solution Series](#) client webinars.

### User Groups

Organized with Customer Success, user groups provide an ongoing network to share best practices and ask questions.

### SAP Concur Community

Join 50,000+ of your peers online to connect, share, learn, and collaborate. [Register 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's solutions, customers come first. We listen to you and learn how we can improve our products and service so your experience keeps getting better.

# Connect, Collaborate, and Inspire

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

## SAP CONCUR FUSION

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

- Education sessions.
- Product trainings and demonstrations.
- Personalized consulting sessions.
- Connections with peers.
- Executive keynotes highlighting SAP Concur solutions' roadmaps.

## SAP CONCUR FUSION EXCHANGE

The **Fusion Exchange** series brings SAP Concur solutions 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 optimize SAP Concur solutions.



**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 solutions have 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 for Business



Triplt



SpotHero

## Popular App Categories



Tax Management



Fraud, Compliance & Risk



Financial & ERPs

# Consider the Possibilities

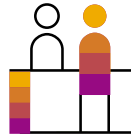
Bring out the best from SAP Concur solutions, and while you're at it, check out what else you can do.

## Consider Adding on These Services:



### [Service Administration](#)

Maximize 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 solutions, and free yourself up for more strategic tasks.



### [Audit Service](#)

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

### [Intelligence](#)

Organize 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.

### [Expenselt](#)

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

### [TripLink](#)

Gain visibility and control into all travel transactions.

## About SAP Concur

SAP® Concur® is the world's leading brand for integrated travel, expense, and invoice management solutions, driven by a relentless pursuit to simplify and automate these everyday processes. The highly-rated SAP Concur mobile app guides employees through business trips, charges are directly populated into expense reports, and invoice approvals are automated. By integrating near real-time data and using AI to analyze transactions, businesses can see what they're spending and avoid possible blind spots in the budget. SAP Concur solutions help eliminate yesterday's tedious tasks, make today's work easier, and support businesses to run at their best. Learn more at [concur.com](https://concur.com) or the SAP Concur [blog](#).



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