



Roles and Responsibility around Support of Direct, Indirect, & TMC cases

PURPOSE

This guide will assist in defining the appropriate roles and responsibilities for the most common customer scenario-based cases opened with SAP Concur Support. The RACI model will provide a more consistent and supportive customer experience by detailing responsible parties based on contractual relationships with customers.

Responsible party definitions are:

- **SAP Concur Support**
- **TMC Partner:** A Travel Management Company (TMC) who is an SAP Concur qualified reseller of Concur products and has an Authorized Support Contact (ASC) within the TMC organization
- **ASC Customer:**
 - **Concur Direct:** Contracts directly with SAP Concur. This can be a unified Concur Travel and Expense agreement, an Expense-only agreement, or a Travel-only agreement.
 - **Concur Indirect:** Contracts SAP Concur Travel through one of the SAP Concur qualified TMC resellers
- **Non-ASC Customer:** An organization associated with the ASC customer, but who is not an ASC (For example, Human Resources (HR), Information Technology (IT))


This document follows the RACI Model structure, which outlines the roles each party is responsible for based on the scenarios outlined in this document.



RACI Model

				
Product Offering – Indirect Travel/Direct Expense Product Scenarios	SAP Concur Support	TMC	ASC	Non-ASC Customer (IT/HR)
Customer contacts SAP Concur to add groups within Travel	A	R	I	
Customer case transitioned to TMC, but they never contacted customer and now customer is calling SAP Concur	A	R	I	
Customer contacts SAP Concur about Trip status not being updated, and customer keeps receiving notifications	A	R	I	
Customer contacts SAP Concur about Triplt/TripLink issue/removal requests	R	A	I	
Customer contacts SAP Concur about a Travel booking error and determines it is due to a Travel custom field	A	R	I	
Customer contacts SAP Concur about a GDS issue	A	R	I	
Customer contacts SAP Concur about an outage/issue with a third-party vendor	R	I	I	
Customer contacts SAP Concur about missing or unwanted features on Travel system	A	R	I	
Customer contacts SAP Concur about new or existing 305/350 Employee file import questions or errors	R	R	R	A
Customer contacts SAP Concur about the system not allowing ticket exchange	A	R	I	
Customer contacts SAP Concur about TMC default settings for air/car/hotel	A	R	I	
Customer contacts SAP Concur about TMC discount settings for air/car/hotel	A	R	I	
Customer contacts SAP Concur about Travel profile/permission issue	A	R	I	
Customer contacts SAP Concur about Travel reporting	A	R	I	
Customer contacts SAP Concur about unused tickets import	A	R	I	
Customer contacts SAP Concur due to itinerary travel integration issues not transmitting to expense properly	R	R	I	
Customer contacts SAP Concur regarding trip auto cancel	A	R	I	
Customer is Indirect and TMC wants to disable free version of Triplt App or banner	R	I	I	
Customer needs Pre-Travel Manager approval edited or deleted	A	R	I	
Customer notifies SAP Concur because functionality is not working, and it is determined that a rule change was made to the Travel policy	A	R	I	
Customer or ASC reports that a connector is not working properly	R	I	I	
Customer or TMC contacts SAP Concur about an application error	R	I	I	
Customer or TMC contacts SAP Concur to report a security incident	R	R	R	
Customer terminates Expense contract only, yet will continue with Indirect Travel relationship	R	C	A	
TMC contacts SAP Concur about Triplt/TripLink issues on behalf of customer	R	I	A	
TMC contacts SAP Concur requesting HR feed data as part of agency conversion	A	I	R	R
TMC on record must notify SAP Concur if the TMC on record or the ASC contact changes	A	R	R	
TMC or Customer calls to report that Expense profiles conflict with the Indirect Travel profile and data is out of sync	R	R	R	
TMC or Customer contacts SAP Concur about Single Sign On (SSO)	R	R	R	
TMC requests access to the customer's sFTP site	A	I	R	





 **R** Responsible

 **A** Accountable


 **C** Consulted

 **I** Informed

RACI Model

	 SAP Concur Support	 TMC	 ASC	 Non-ASC Customer (IT/HR)
Product Offering – Direct Travel/Direct Expense				
Customer changes TMCs	C	A	R	
Customer contacts SAP Concur about an error on a custom field	R		I	
Customer contacts SAP Concur about a GDS issue	R	R	I	
Customer contacts SAP Concur about missing features on Travel system	R	A	I	
Customer contacts SAP Concur about missing or unwanted features on Travel system	A	A	I	
Customer contacts SAP Concur about new or existing 305/350 Employee file import questions or errors	R	R	I	
Customer contacts SAP Concur about TMC default settings for air/car/hotel	R	R	I	
Customer contacts SAP Concur about TMC discount settings for air/car/hotel	R	R	I	
Customer contacts SAP Concur about Travel profile/permission issue	R		A	
Customer contacts SAP Concur about Travel profile/permission issue (third party profile tool)	R	C	A	
Customer contacts SAP Concur about unused tickets and how to apply them	R		A	
Customer contacts SAP Concur about unused tickets import	R	R	I	
Customer contacts SAP Concur due to Itinerary Travel integration issues not transmitting to Expense properly	R	R	I	
Customer contacts SAP Concur regarding how to add groups within Travel	A		R	
Customer contacts SAP Concur regarding Triplt/TripLink issue/removal requests	R		I	
Customer must notify SAP Concur if the ASC contact changes	C		R	
Customer needs pre-travel manager approval edited or deleted	R		A	
Customer notifies SAP Concur because functionality is not working, and it is determined that a rule change was made to the Travel policy	R		I	
Customer reports that a connector is not working properly	R		I	
Customer or TMC contacts SAP Concur about an application error	R	I	I	
Customer or TMC contacts SAP Concur regarding a security incident	R	R	R	
Customer requests the transition of users from Direct to Indirect	A	I	R	
TMC requests the transfer of user profiles or files from a Direct site to an Indirect site	A	I	R	
TMC contacts SAP Concur about Triplt/TripLink issues on behalf of customer	R	I	A	
TMC contacts SAP Concur regarding Triplt/TripLink issue/removal requests	A	I	R	
TMC contacts SAP Concur requesting HR feed data as part of agency conversion	A	I	R	R
Customer or TMC contacts SAP Concur about Single Sign On (SSO)	R	R	R	
Customer contacts SAP Concur about trip status not being updated and customer keeps receiving notifications	R	A	I	





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RACI Model

				
Product Offering – Indirect Travel/Request Direct Product	SAP Concur Support	TMC	ASC	Non-ASC Customer (IT/HR)
TMC contacts SAP Concur about offline booking displays in SAP Concur Travel but is not linked to Request	R	R		
Customer contacts SAP Concur about offline booking missing from both Travel and Request	R	R	I	
Customer reports that trip is fully approved but trip is not ticketed	R	R	I	
Customer reports that trip approval request was sent to wrong approver	R	A	I	
TMC reports that trip approval was not completed	R	A		
TMC reports that a user is booking from approved request and does not receive desired results in travel search	A	R		
TMC reports that a user is booking from approved request and receives an error during booking process	A	R		
Customer needs the Request set-up to be modified or checked (policy, e-mails, workflow, forms & fields, printed report, change logs, Travel Agency Office, audit rules, ...)	A		C	
Customer needs to add, remove or consult Request permissions	A		R	
Customer opens the case with Request Support for a cancelled request, but the associated trip was not, and the issue is located in Request module (kept with Request Support Team)	R		I	
Customer opens the case with Request Support for a cancelled request, but the associated trip was not, and the issue is located in Travel module (reassigned to Travel Support & TMC)	R	R	I	
Customer opens the case with Request Support for a request fully approved but trip is not ticketed, and the issue is located in Request module (kept with Request Support Team)	R		I	
Customer opens the case with Request Support for a request fully approved but trip is not ticketed, and the issue is located in Travel module (reassigned to Travel Support & TMC)	R	R	I	
Customer reports errors during the approval process of the request (workflow failure)	R		C	
Customer reports that a request was sent to wrong approver, or any workflow set-up related question	R		C	
Customer reports that the Passenger Name Record (PNR) does not reach the request (import failing - offline Passenger Name Record retrieval)	R	A	C	
Customer reports that the PNR was imported into the request, but the Request workflow did not move on (offline PNR retrieval)	R	A	C	
TMC needs the Travel set-up to be modified or checked within Travel config/Travel agency config (Travel policy, finishing templates, queues set-up, Travel search Tool settings, ...)	A	R		
TMC needs to add, remove or consult Travel permissions	A	R		
TMC opens the case with Travel Support for a cancelled request, but the associated trip was not, and the issue is located in Travel module (kept with Travel Support)	R	R		
TMC opens the case with Travel Support for a cancelled request, but the associated trip was not, and the issue is located in Request module (reassigned to Request & ASC)	R	I	R	
TMC opens the case with Travel Support for a request fully approved but trip is not ticketed, and the issue is located in Request module (reassigned to Request & ASC)	R	I	R	
TMC opens the case with Travel Support for a request fully approved but trip is not ticketed, and the issue is located in Travel module (kept with Travel Support)	R	R		
TMC reports a user booking from approved request and receives an error during booking process	R	R		
TMC reports a user is booking from approved request and does not receive desired results in travel search	R	R		
TMC reports an Offline PNR not imported into trip library (not meant to be imported in a Request but PNR Acquisition in TRV only)	A	R		





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Product Offering – Direct Travel/Request Resell (Indirect Request)/Expense Activated, and ASC has Permissions	SAP Concur Support	TMC	ASC	Non-ASC Customer (IT/HR)
Customer contacts SAP Concur about an Indirect Request reporting issue with Request	A	R		
Customer needs the Travel set-up to be modified or checked within Travel config/Travel Agency config (Travel policy, finishing templates, queues set-up, Travel search Tool settings, ...)	A	R		
Customer needs to add, remove or consult Travel permissions	R		I	
Customer opens the case with Request Support for a cancelled request, but the associated trip was not, and the issue is located in Request module (kept with Request Support Team)	R	R	I	
Customer opens the case with Request Support for a cancelled request, but the associated trip was not, and the issue is located in Travel module (reassigned to Travel Support & TMC)	R	I	R	
Customer opens the case with Travel Support for a cancelled request, but the associated trip was not, and the issue is located in Request module (reassigned to Request & ASC)	R	R	I	
Customer opens the case with Travel Support for a request fully approved but trip is not ticketed, and the issue is located in Request module (reassigned to Request Support & TMC)	R	R	I	
Customer opens the case with Travel Support for a request fully approved but trip is not ticketed, and the issue is located in Travel module (kept with Travel Support Team)	R	R		
Customer reports a user booking from approved request and receives an error during booking process	R	R		
Customer reports a user is booking from approved request and does not receive desired results in travel search	A	R		
Customer reports an offline PNR not imported into trip library (not meant to be imported in a Request but PNR acquisition in TRV only)	A		C	
TMC needs the Request set-up to be modified or checked (policy, e-mails, workflow, forms & fields, printed report, change logs, Travel Agency Office, audit rules, ...)	A		R	
TMC needs to add, remove or consult Request permissions	R	R		
TMC opens the case with Request Support for a request fully approved but trip is not ticketed, and the issue is located in Request module (kept with Request Support)	R	I	R	
TMC opens the case with Request Support for a request fully approved but trip is not ticketed, and the issue is located in Travel module (reassigned to Travel & ASC)	R	R		
TMC opens the case with Travel Support for a cancelled request, but the associated trip was not, and the issue is located in Travel module (kept with Travel Support)	R		C	
TMC reports errors during the approval process of the request (workflow failure)	R		C	
TMC reports that a request was sent to wrong approver, or any workflow set-up related question	R	A	C	
TMC reports that the PNR does not reach the request (import failing - offline PNR retrieval)	R	A	C	


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