Getting the Most from SAP Concur Support
A Guide for Authorized Support Contacts

August 2020
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This guide provides information for Authorized Support Contacts (ASC) on how to best utilize SAP Concur Support, including the following topics:

- ASC Management
- Request Support
- Escalation Process
- Priority 1 Incidents
- Case Management through the SAP Concur Support Portal

AUTHORIZED SUPPORT CONTACT MANAGEMENT

During Implementation, SAP Concur assigns the required two and up to five company-designated Authorized Support Contacts (ASC) access to the SAP Concur Support Portal, chat, and phone support. Thereafter, additional ASCs (maximum of five) will be managed by your company’s Administrators. To activate the access, the ASC clicks the Contact Support link.

Standard Edition

ASC Permission – User Permissions

This permission grants access to the Support Portal. Administrators manage the ASC access by following the steps below:

1. From SAP Concur, navigate to Administration > Expense or Invoice or Expense & Invoice Settings > User Accounts.
2. In the Search box, enter the user’s data and click the magnifying glass icon.
3. To open, double click the user’s name.
4. Scroll to the User Permissions section.
5. Select the following permission based on your product:
   a. Can Administer (for Travel only or Expense only customers)
   b. Is Invoice Admin (for Invoice only customers)
   c. Travel & Expense Administrator (for Travel and Expense customers)
6. Click Save.

Professional Edition

There are two options to manage access for ASCs. Travel & Expense customers can utilize both options.

1. ASC Permission through User Administration (Best Practice)
2. ASC Permission through Permission Administrator
<table>
<thead>
<tr>
<th>1. ASC Permission – User Administration</th>
<th>2. ASC Permission – Permission Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available for customers with Expense or Invoice. Administrators manage the ASC permission by following the steps below:</td>
<td>Available for customers with Travel. Administrators manage the ASC permission by following the steps below:</td>
</tr>
<tr>
<td>1. From SAP Concur, navigate to Administration &gt; Company &gt; Company Admin &gt; User Administration.</td>
<td>1. From SAP Concur, navigate to Administration &gt; Company &gt; Company Admin &gt; Permission Administrator.</td>
</tr>
<tr>
<td>2. In the Search Text box, enter the user’s data that corresponds with the selection in the Search What drop-down and click Search.</td>
<td>2. Click the Travel tab (if applicable).</td>
</tr>
<tr>
<td>3. To open, click the user’s Last / First name link.</td>
<td>3. Select Modify Permissions by: Permissions.</td>
</tr>
<tr>
<td>4. Select the Authorized Support Contact box.</td>
<td>4. Select the Permission Name: Authorized Support Contact.</td>
</tr>
<tr>
<td>5. Click Save.</td>
<td>5. Find and select the user to update and click Add or Remove.</td>
</tr>
<tr>
<td>6. Click Save.</td>
<td>6. Click Save.</td>
</tr>
</tbody>
</table>

**SAP CONCUR SUPPORT PORTAL**

The SAP Concur Support Portal provides resources and self-service offerings. SAP Concur Support provides assistance for up to five company-designated ASCs. Once the ASC permission has been assigned, the Contact Support link will automatically appear within SAP Concur for convenient access to the SAP Concur Support Portal via Single Sign-On (SSO). To activate this access, click Help > Contact Support.

**Alternate Contact Support Link Locations and Trusted Site**

The Contact Support link may appear at the bottom of the page or as Support next to the Help tab. To allow access, ensure pop-up blocker is disabled and add one of the following as a trusted site in your browser settings:

SAP Concur Support Portal – At A Glance

1. **My Profile | Close (Log out):** Easily update profile information and log out (Close).
2. **Menu Tabs:** Access to the most commonly used features.
3. **Ask me anything Search Bar:** Quick access to Knowledge Base answers, cases, Solution Suggestions, Training, Technical Publications (e.g. User Guides), and SAP Community.
4. **Information Center:** View important notices from Support, Security, and Operations (maintenance) and opt-in to receive these notices by e-mail.
5. **Create and View Cases:** A designated area for prompt and convenient access to cases.
6. **Knowledge Base:** Accessible from different SAP Concur Support Portal pages to easily find answers.
7. **Suggestions:** Submit, view, and vote on Solution Suggestions.
8. **Chat with Support:** Receive assistance through chat for quick questions.
9. **Call Support:** Link to access the Global Support phone numbers.
10. **From the Community:** A place for customers to share information with each other.
11. **Quick Link Menu Bar:** Complete visibility of the top Menu Tabs and their drop-down menu selections.
My Profile Options and Preferences

When transferring to the SAP Concur Support Portal for the first time, the User Information Confirmation box will display prompting to create your My Profile. Complete the required fields, options, preferences, and review first name, last name, and e-mail address. If name or e-mail needs modification, contact your Concur Administrator as changes must be made in your Concur profile.

Language Option

In addition to English, the SAP Concur Support Portal offers seven localization options for ASCs: Chinese (Simplified), French, German, Japanese, Korean, Portuguese (Brazilian), and Spanish. When an ASC chooses a language option from the Select Your Language drop-down menu, the static values on the SAP Concur Support Portal pages will be translated. This translation includes headers, footers, and content in the drop-down for case topic and case type values.

Note: For customers who have purchased the User Support Desk (USD) service, end-users can choose between six localization options in addition to English upon initial login to the USD Portal: Chinese (Simplified), French, German, Japanese, Portuguese (Brazilian), and Spanish. Language options can be changed at any time within the end-user’s USD Portal profile.

Profile Preferences

Authorized Support Contacts can manage and update Profile Preferences to opt in (or out) of the following offerings:

- Service Alerts – Receive e-mails for any incidents managed outside of Concur Open, our System Status Dashboard, or extenuating notifications other than incident management.
- Language Support – Accept support in English when high demand for specific language support causes a delay in cases being addressed.
- Information Center Notices – Receive important Information Center Notice e-mails from Support, Security, and Operations.
- Case Calls – Opt out to receive calls regarding cases.

For additional SAP Concur Support Portal information, please reference the Customer Support Documentation and e-Learning Course section.

REQUEST SUPPORT

Authorized Support Contacts (ASC) can contact SAP Concur Support for assistance by creating a case in the SAP Concur Support Portal, chat, or phone. To report an issue, ask a question, or make a request, the preferred method is to create a case. Regardless of the complexity of the issue or request, submitting a case provides the most efficient results by allowing detailed information and relevant documents to be included.

For detailed information, refer to the Support Policy for SAP Cloud Services.

Customer Responsibility

ASCs are encouraged to review the Knowledge Base in the SAP Concur Support Portal for a possible solution prior to contacting SAP Concur Support for assistance. If you are experiencing a performance issue outside of the Saturday standard maintenance window, please check Concur Open or your inbox if subscribed to Personalized Concur Open Updates.

For SAP Concur Support to resolve an issue, the steps to reproduce must be provided. When possible, copy and paste the information from your SAP Concur solution into the case especially for complicated items such as record locator, report IDs, or job numbers to ensure accuracy.
**USD Case Handling**

For customers who have purchased the User Support Desk (USD) service, when SAP Concur Support requires ASC involvement to resolve an end-user issue, the case will be assigned to an ASC. The ASC will be responsible for the following:

- Acting as the main contact
- Working hand in hand with SAP Concur Support
- Collecting information from end-user
- Authorizing testing
- Approving or conducting configuration changes

**Customer Response Levels**

All cases will automatically default to a Priority 3 (P3) and once SAP Concur Support reviews the case, a priority is assigned. The priorities are described in the *Customer Response Levels* section of the Support Policy for SAP Cloud Services and determines the maximum length of time for initial response, ongoing communications, and targeted resolutions.

**Note:** For resolutions that are dependent upon third-party vendors, the ongoing communication levels are not applicable.

**Mission Critical Support**

Based on assigned priority, cases will be worked as listed below:

- 24x7 Mission Critical Support for P1 and P2 issues (English only)
- Non-Mission Critical Support for P3 and P4 issues during business hours (English only) – Monday to Friday 8 am to 6 pm (Local Time Zone), excluding local holidays

**24/7 Chat and Phone Support**

Chat and phone support are most effective for basic questions that can be easily answered. ASCs may be asked to provide their name, company name, SAP Concur solution, and to verify the e-mail address associated with the account. The SAP Concur Support representative will create a case to provide a transcript of the conversation for our records. Should more advanced support be required, the case will be transferred to the group with the appropriate level of expertise.

**Chat with Support:** On the SAP Concur Support Portal home page, click Chat with Support and based on the assistance needed, select one of the following four options: Expense, Travel, Invoice, or Concur Request. Once selected, a dialog box will display for an SAP Concur Support representative to join the Chat.

**Phone Support:** If all representatives are engaged with other customers, a callback feature will be offered to reserve your place in the queue by entering a phone number.

**Co-browse:** SAP Concur Support also offers a Co-browse feature which is a secured screen-share application providing view-only access to your SAP Concur solution. This feature is available to Authorized Support Contacts located under the Help menu.

**Note:** The Global Support Phone Numbers can also be found on the SAP Concur Support Portal home page > Call Support > View global phone numbers.
### Global Support Phone Numbers

#### Americas

<table>
<thead>
<tr>
<th>Country</th>
<th>Contact Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA &amp; Canada</td>
<td>+1 877 901 4960</td>
</tr>
<tr>
<td>Portuguese (Brazil)</td>
<td>800 047 4911</td>
</tr>
<tr>
<td>Mexico</td>
<td>1800 083 5525</td>
</tr>
</tbody>
</table>

#### Asia Pacific Australia (APA)

<table>
<thead>
<tr>
<th>Country</th>
<th>Contact Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>All APA (outside of Australia enable international service)</td>
<td>+61 288 803 271</td>
</tr>
<tr>
<td>China</td>
<td>400 639 9237</td>
</tr>
<tr>
<td>Indonesia</td>
<td>180 344 2494</td>
</tr>
<tr>
<td>Vietnam (Viettel and VNPT)</td>
<td>120 115 20</td>
</tr>
<tr>
<td>Philippines</td>
<td>00 800 255 56311</td>
</tr>
<tr>
<td>Taiwan</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td></td>
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<tr>
<td>Hong Kong</td>
<td></td>
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<tr>
<td>Japan</td>
<td></td>
</tr>
<tr>
<td>Malaysia</td>
<td>+800 255 56311</td>
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<tr>
<td>New Zealand</td>
<td></td>
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<tr>
<td>Singapore</td>
<td></td>
</tr>
<tr>
<td>South Korea</td>
<td></td>
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<tr>
<td>Thailand</td>
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</tbody>
</table>

#### Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Contact Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Czech Republic</td>
<td>2961 816 18</td>
</tr>
<tr>
<td>France</td>
<td>080 55 425 23</td>
</tr>
<tr>
<td>Germany</td>
<td>080 07 23 86 05</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>+44 203 79 36 932</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>020 379 36 932</td>
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<tr>
<td>Austria</td>
<td></td>
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<td>Belgium</td>
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<td>Bulgaria</td>
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<td>Cyprus</td>
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<td>Denmark</td>
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<td>Estonia</td>
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<td>Finland</td>
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<td>Italy</td>
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<td>Latvia</td>
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<td>Lithuania</td>
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<td>Luxembourg</td>
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<td>Malta</td>
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<td>Netherlands</td>
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<td>Poland</td>
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<td>Portugal</td>
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<tr>
<td>Portugal</td>
<td></td>
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<tr>
<td>Slovak Republic</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td>00 800 22 21 87 87</td>
</tr>
</tbody>
</table>

**Note:** End-users calling the Global Support phone numbers will be advised to contact your company Administrator or redirected to the User Support Desk (USD) if your company has purchased the USD service. For companies that have purchased the USD service, the Contact Support link is visible to all end-users to search the Knowledge Base, chat with Support, or create a case. The Global USD phone numbers can be found on the USD Portal (USD Home > Support Hotline > View global phone numbers) and in the Knowledge Base.
STANDARD MAINTENANCE WINDOW

If users experience a performance issue during the Saturday standard maintenance window, it is not necessary to contact SAP Concur Support. When a planned disruption is known, rendering the service unavailable for an expected 60 minutes or more, ASCs will be notified through the Information Center within the SAP Concur Support Portal or by e-mail if opted in to receive these notices.

Below is the schedule for each data center:

<table>
<thead>
<tr>
<th>Data Center</th>
<th>Saturday Schedule</th>
<th>Sunday Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>12 AM to 4 AM UTC</td>
<td>5 PM to 9 PM PST/PDT</td>
</tr>
<tr>
<td>EMEA</td>
<td>9 PM to 1 AM UTC</td>
<td>11 PM to 3 AM CET/CEST</td>
</tr>
<tr>
<td>China</td>
<td>3 PM to 7 PM UTC</td>
<td>11 PM to 3 AM SGT</td>
</tr>
</tbody>
</table>

ESCALATION PROCESS

Cases

In the unlikely event a response is not received within the Customer Response Levels, please ask for an update in the Case Comments section. If the case needs to be escalated, click the Escalate button within the case and an escalation notice will be sent to the assigned team. A red up arrow next to the Case Number denotes escalated cases.

This process applies regardless of whether the case was initially submitted on the SAP Concur Support Portal, via chat, or through phone support.

Product and Technology

SAP Concur Support may need to escalate the case to Product and Technology (tln/a R&D) for investigation and prioritization. In these instances, the assigned representative remains responsible for providing case updates until resolution.

Below are the possible updates on the outcome of the investigation:

- We have investigated and fixed this issue.
- We have investigated this issue and have scheduled it to be fixed in an upcoming sprint.
- We have investigated this issue but, due to effort/complexity or scheduling constraints, we have rescheduled it for additional investigation in an upcoming sprint.
- We have investigated this issue and determined that we will be unable to prioritize it for resolution at this time. We will continue to monitor this issue going forward for consideration in future maintenance or feature enhancements.

PRIORITY 1 INCIDENTS

Concur Open and Personalized Concur Open

To view and track P1 Incidents, Concur Open and Personalized Concur Open (PCO), Service Status Dashboard, displays availability status 24/7 for SAP Concur solutions. Service status can be viewed by day for the most recent 20 days. When SAP Concur is aware of a performance issue, it will be reflected within these resources; therefore, it is not necessary to contact SAP Concur Support.

Note: When logged in to your personalized view, only purchased services will display in the PCO Service Status Dashboard.
Service Status Dashboard Legend

Service availability status is indicated by one of the icons below. For a definition, hover your mouse over each icon in the legend located at the bottom of the Service Status Dashboard.

- **Normal** – Service is 100% up and operating normally.
- **Disruption** – Service is unavailable or unusable for all users.
- **Degradation** – Service is unavailable or unusable for many users.

Message Types

In the event of a P1 incident, a series of messages will provide information as SAP Concur works to resolve the issue. The table below outlines the types of messages found by clicking the icon associated with a service not operating normally. For additional information, click About Concur Open.

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Message Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue Identified</td>
<td>Marks the start of the incident and provides preliminary information regarding the potential user impact.</td>
</tr>
<tr>
<td>Issue Status Update</td>
<td>Confirms the accuracy of the Issue Identified message and describes the service impact. Updates are sent approximately every hour and provide more details.</td>
</tr>
<tr>
<td>Issue Resolved</td>
<td>Marks the end of an incident and indicates the service has returned to normal.</td>
</tr>
<tr>
<td>Issue Identified and Resolved</td>
<td>Marks the end of an incident and indicates the service has returned to normal.</td>
</tr>
<tr>
<td>Root Cause Analysis (PCO only)</td>
<td>Provides detailed information about the cause of the incident, resolution, and corrective actions taken to ensure prevention of future occurrences.</td>
</tr>
</tbody>
</table>
Personalized Concur Open

Authorized Support Contacts and end-users can log in to a personalized view of the Concur Open Service Status Dashboard displaying only the services that have been purchased. Along with viewing the service status by day for the most recent 20 days, a history for the past two years is available by clicking View Service Status History.

To access Personalized Concur Open, log in using your existing SAP Concur credentials or e-mail address if using Single Sign-On (SSO) by following the steps below:

1. Navigate to Concur Open.
2. Click Log in to Personalized Concur Open.
3. Select Username. Or Select Send a link to my e-mail (required for SSO users)
   a) Enter SAP Concur username and click Continue. a) Enter the e-mail address and click Continue.
   b) Enter password and click Sign In. b) From your e-mail, click Sign in with SAP Concur.

Note:
- If using SSO, the e-mail address must be unique and not a shared e-mail within your organization.
- The one-time SSO link is active for one hour after being generated.
- Once logged in, access remains active for 30 days.

Subscribe to Updates

The Personalized Concur Open subscription feature allows customers to sign up and receive real-time e-mail or RSS notifications about service issues that are specific to your company. E-mails are sent from ConcurOpenUpdates@sap.com for all subscribed preferences.

To subscribe to updates through e-mail, follow the steps below:

1. Once logged into Personalized Concur Open, click Subscribe to Updates.
2. On the Update Subscription Preferences page, enter your e-mail address and select your preferences.
3. Click Update Preferences.
4. Check your e-mail for a link to verify your subscription.
5. Click Verify to confirm your subscription.

Note:
- When updating your e-mail address for notifications, verification will be sent to confirm you are the owner.
- Only one subscription e-mail address will be allowed and can be changed at any time.
- Click RSS to display the XML file to be added to your RSS reader. The RSS notifications will include all Personalized Concur Open updates.
SERVICE ALERT E-MAILS

Service Alerts are e-mails for incidents managed outside of Concur Open or extenuating notifications other than incident management. To receive Service Alerts from concursupport-servicealerts@concur.com, update the My Profile page in the SAP Concur Support Portal by following the steps provided below:

1. From SAP Concur, click Contact Support.
2. Click My Profile.
3. Check the Opt In to receive Service Alert e-mails box and click Save.

Note: To stop receiving Service Alerts, uncheck the Opt In to receive Service Alert e-mails box and click Save.

CASE MANAGEMENT

On the SAP Concur Support Portal, cases can be created, viewed, updated, and downloaded.

Creating a Case

1. From SAP Concur, click Contact Support to access the SAP Concur Support Portal.
2. From the home page, click Create a Case.
3. Enter details in the Case Description field including steps to reproduce the issue, unique identifiers, date and time, impacted end-users, or other pertinent details related to the case.
4. Enter a brief description of the case in the Subject field.

Based on the subject entered, any relevant Knowledge Base articles or Concur Training resources such as user guides, videos, release notes, and other documents will be displayed in the Suggested Articles section.
5. Within the Suggested Articles section, click the appropriate link to display the article or resource.
   - To review a specific article, click the article link and a new window will open.
     - If the article answers the question, click Yes – Take me to the Knowledge Base or navigate to another tab on the SAP Concur Support Portal.
     - If no relevant articles display, click Continue Creating a Case.

   **Note:** Within the Knowledge Base, articles can be viewed in additional languages by clicking the Language drop-down and selecting the desired language.

6. Select the most appropriate **Topic** and **Case Type** from the drop-down lists.

7. Select the most appropriate **Urgency (Customer Assessment)** from the drop-down list. The options include:
   - 1 – Very High (Core service is completely down)
   - 2 – High (Business processes seriously disrupted)
   - 3 – Medium (Business processes affected)
   - 4 – Low (Little or no effect on business processes)

8. Cases automatically default to P3 – Medium. Refer to the **Customer Response Level** section for additional information.

9. Select the appropriate **Case Region** from the drop-down list. The options include:
   - APA
   - EMEA
   - LATAM
   - North America

10. Enter the **Site/URL/Acct. #** if applicable.

11. If the preference is to have an SAP Concur Support representative call before working the case, select the **Call Me** box. Please ensure the correct phone number is listed in **My Profile**.

12. To authorize SAP Concur to troubleshoot the case within your production site, select the **Concur may test in my production site** box.

13. If Service Administration or Service Assistant has been purchased, check the **Service Admin** box to route the case to the applicable queue.

14. Enter up to eight additional e-mail addresses in the **CC E-mail** fields to include others on updates from SAP Concur Support.

   **Note:** Case owners can update cases through e-mail, however, updates cannot be viewed from the SAP Concur Support Portal.

15. Click **Submit & Add Attachments** to attach any documentation that can assist SAP Concur Support in the case resolution. Complete the three steps to attach a file. Each file is limited to 25 MB.

   **Note:** For security purposes, attachments are not allowed on case updates through e-mail.

16. Click **Submit** and a case number will automatically be assigned.

   **Note:** For data files, the preferred method is to upload the import or export job file to a company’s File Transfer Protocol (FTP) site without encryption. This method allows SAP Concur Support to access and view files in a secure manner. Additionally, please do not attach files with sensitive data such as complete credit card or social security numbers.
Viewing a Case

1. From SAP Concur, click Contact Support to access the SAP Concur Support Portal.
2. From the home page, click the View Cases box.
3. From the View drop-down list, choose from one of the following options:
   - 1 – All Open Admin Cases
   - 2 – All Closed Admin Cases
   - 3 - *All Open End User Cases
   - 4 - *All Closed End User Cases
   - 5 – My Cases
   - 6 – Recently Viewed Cases
4. To sort cases by ascending or descending order, click on a specific column heading.
5. To view one case at a time, click the Case Number or Subject link.
6. To update a case, click Add Comment in the Case Comments section.
7. To search the Knowledge Base, click Find Articles.
8. To add an attachment, click Attach File and complete the three steps. Each file is limited to 25 MB.
9. To close a case, click Close Case, select Close under Status, and click Submit.
10. To print a case, click the Printable View link.

Note: Case owners can update cases through e-mail; however, for security purposes, attachments are not allowed. Additionally, e-mail updates cannot be viewed from the SAP Concur Support Portal.

Pending Customer Status

If SAP Concur Support requires additional information to resolve a case, the status will change to Pending Customer. The Case Comments section will specify what is needed in order to proceed. No progress can be made until the case is updated with the requested information. Should customers choose not to respond, the case will be automatically closed in 30 days. A case can be re-opened within seven days of closure; however, after that time, a new case must be created.

Downloading a Case Report

1. From SAP Concur, click Contact Support to access the SAP Concur Support Portal.
2. From the home page, click the Support tab at the top of the menu bar.
3. Click Download Case Report.
4. Select the appropriate Report Criteria:
   - Report Type: My Organization’s Cases, My Cases, or End User Cases
   - Case Status
   - Cases Created Between and/or Cases Closed Between
   - The number of records per page
5. Click Execute Report. Executing a report runs the query to pull the requested data which is displayed on the screen.
6. Click Download Report.
   - If there are more than 250 records, click Report Files. When the report is available for download, the Request Status will change from Requested to Complete and the Download Report link appears.
     Note: An e-mail notification will be sent when the report is available to download.
   - Downloading the report transfers the following data into an Excel file: Subject, Case #, Date Created, Reported By, Date of Last Comment, Status, Site/URL/ACct. #, and Date Closed.

Note: The end-user and Audit Cases report types are only available to download if the User Support Desk and/or Audit services have been purchased.

Closed Case Survey

After a case has been closed, an e-mail with a link to the Closed Case survey will be sent. This survey allows ASCs an opportunity to provide feedback on the level of satisfaction with the knowledge, communication, and timeliness of the resolution from SAP Concur Support.

CUSTOMER SUPPORT DOCUMENTATION AND E-LEARNING COURSE

The resources listed below can be found in the Concur Training Library.
   - Online Billing Portal Guide
   - How to Navigate the SAP Concur Support Portal
   - Getting the Most from SAP Concur Support e-Learning Course

The e-Learning course can also be accessed by following this path on the SAP Concur Support Portal: Resources > Webinars > Concur Support Training.