
A Solution Series Webinar

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Agenda - where we’re going

- Overview of the Tips and Tricks Resource
- Top Tips and Tricks related to:
  - Global Expansion
  - Strategic Spend Management
  - Duty of Care
  - Compliance and Fraud
- Questions and Ideas
Start thinking…

1. Think of a tip, best practice, or trick of the trade that you use at your organization.

2. Get out your phone and send it to tips@concur.com.

3. We’ll pick tips to share on future webinars and events.
You’ll receive an autoreply with the link for our tips and tricks document, covering:

- Concur Expense, Concur Travel, Concur Invoice, and Concur Request
- Reporting and benchmarking
- Program tips, policies, adoption, supporting your end users – and more
- Contains links to templates and resources, when applicable
Know what training is available

There are a lot of options for training on SAP Concur solutions. You’ll find helpful resources for both users and admins as well as reporting training and on-demand options at www.concurtraining.com.

- Get adoption kits for mobile app, Concur TripLink, ExpenseIt, Concur Drive, Concur Hipmunk, and more.
- To make them easier to find, bookmark your professional training toolkit or standard training toolkit and visit often.
- E-mail training@concur.com anytime for a quote on custom training or view our web site.
- View a customer learning series session (tip #16).
Driving change and adoption throughout an organization can be difficult. Make it easier on your end users and your leadership team by communicating the vision.

- Share **why** you’re rolling out SAP Concur solutions to inspire users to become power users or, at a minimum, abide by your policies.
- Executives are most effective at communicating the vision – and the most persuasive to end users.
- Use the Change Management Activities Guide for communication templates and best practices.
Join the SAP Business Exchange


- Discuss SAP Concur features and products, learn about best practices, and network with your peers.
- There’s an entire hub dedicated to Concur Travel.
- Administrators can also request to join the user admin group.
- In the user admin group, keep on top of what’s new (tip #20) with our innovative enhancements and features posted monthly.
#181

Compliance

Use report bursting for alerts and notifications

Consider using report bursting as a communication tool to reach your end users. Reports like these can improve user satisfaction and drive adoption and compliance.

▪ Deliver automated emails to employees embarking on travel in areas that might need a visa or have special travel restrictions.

▪ Provide policy timelines or tips to users who are entering expenses for the first time or after a long hiatus.

▪ Essentially, these are reports scheduled to run every day, but only are sent when certain criteria are met.
Collect your users’ feedback

The SAP Concur satisfaction rating allows users the option to anonymously share their thoughts about their current experience with SAP Concur products.

- Make sure your organization has this turned on.
- Provides user satisfaction data to you as well as the SAP Concur solution team.
- Monitor the user rating summary (administration folder) to adjust policies, configurations, or training.
Visa requirements

International travel can pose great complexity from a visa and tax perspective, but that doesn’t mean it has to be difficult for your employees.

▪ Activate the Visa requirements reminder feature to remind travelers to check the visa/entry requirements when booking international travel.

▪ Consider using SAP Concur App Center partner EY, whose Travel Risk & Compliance solution is fully integrated into your travel and expense workflow so employees are alerted of tax risks and immigration requirements as they’re booking their trip.
Tips and Tricks:

Strategic Spend Management
Ideas for mobile adoption

Get creative when promoting the SAP Concur mobile app.

- Use e-mail signatures, flyers, newsletters, intranet, in-person gatherings, and internal social media channels to reach your end users.
- Start by getting support from your executive sponsors – they can inspire your users and approvers / managers.
- Promote the app within your organization using the administrator toolkit promotional guide.
- Consider targeting communications to specific user groups (tip #33).
Refresh your company notes

Keep your SAP Concur home page fresh and update *Company Notes* once a quarter.

- Communicate important focus areas and company goals.
- Good way to announce new policies or any changes to the SAP Concur site
- Direct your users on how to get support – such as contact info like e-mail or phone, where to find training materials, or how to contact User Support Desk.
Improve the employee experience and get more visibility and control by centralizing your purchase card (p-card) process.

- Send these transactions through SAP Concur with Company Bill Statements (CBS).

- Reconciling all p-card and expense transactions in one place reduces reconciliation, approval, audit, and payment efforts and provides a more complete picture of your employee spend.
Optimize your reporting

Use the “SAP Concur Optimization: Best Reports to Track Business Metrics” document to get the most value from your SAP Concur solution.

- Discover key reports to pull on topics like accruals, mobile stats, travel policy compliance, corporate card spend, and more.
- Covers reports available in both Analysis and Intelligence.
#51 Visibility

Itemized hotel charges

Require itemized hotel charges to track and report on expenses. Itemization captures taxes and helps address unauthorized hotel expenses like in-room entertainment.

- Encourage your users not to add meal charges to the Nightly Lodging Expenses tab (for example, room service is not a recurring expense and might be different each night).

- Use this data to build free internet or breakfast into your negotiated rates.

- If you discover a lot of “other” expense types, it may be worth investigating to see where that spend is going.
Access your “Insights” dashboard

The SAP Concur App Center “Insights” dashboard uses your organization’s data to indicate if an app center partner integration could help you save money, create a better user experience, or solve operational challenges.

- The report also includes the potential ROI if you use a partner solution.
- Ask your SAP Concur account team to share this report with you today.
Make parking easier and less spendy

Parking is a big ancillary spend item. According to SAP Concur App Center partner SpotHero, business travelers spend approximately $3 billion on parking fees a year.

- Consider using partners like SpotHero, The Parking Spot, ParkWhiz, or Park ‘N Fly to make it easy for travelers to reserve and expense spots.
- This will help to reduce parking spend across your organization and improve traveler satisfaction.
Did you know that flights booked 7–14 days in advance are on average $150 cheaper than flights booked less than 2 days in advance?

- Target communications to encourage travelers to book in advance.
- Use the User Concur Travel History to see who is purchasing those last-minute tickets.
Ground transportation

Ground transportation spend (limos, taxis, and rideshare) is often overlooked when compared to air, rental car, and hotels. Spend on these vendors – when unmanaged – can be quite surprising.

- Analyze your spend and consider other transportation options, such as enabling one of the many ground connectors in Concur Travel to reduce spend and drive policy.
- Consider enabling Uber for Business, an SAP Concur App Center partner that provides visibility on Uber rides (on average $9 cheaper than a taxi).
Unused plane tickets

Develop a policy on how to deal with unused plane tickets.

▪ When an employee leaves the organization, if the ticket is under a certain amount, it may not be worth seeking reimbursement. However, at higher amounts, the employee may have to reimburse the organization – especially if your organization is CBCP.

▪ Run the “Unused Tickets” Concur Travel report and work with your airline partners on rebates or waivers for name changes so tickets don’t go unused. It’s helpful to cross-reference this report with your TMC.
Receipt Requirements and Tax

Include your organization’s tax professionals to ensure you are setting up the right requirements for Concur Expense and Invoice.

- Your tax team would be able to differentiate needs based on your industry (e.g. government contracts, FINRA, SOX) and countries (e.g. Works councils, Mexico CFDI, Australia FBT, VAT reclaim).
Split expense report approval

Consider turning on the “Split Expense Report Approval” feature in Concur Expense.

- This enables your organization to reject a single line item on an expense report, allowing the remainder to be paid to the corporate card or reimbursed to the user.
- This also reinforces good education to the end users as to why an expense line item was rejected.
- Note: the rejected line item(s) start a new expense report.
Tips and Tricks:

Duty of Care
Provide thorough pretrip advisories or country reports for employees to review for an understanding of recent incidents or events that may impact their trip.

- Know your global travel destinations and establish country risk rating – low, medium, high.
- Additionally, these documents can provide good insight into the political, social, and financial stability of the country before the visit.
- Consider getting creative with communication methods with tips #29, 144, and 181.
Custom text and dynamic messaging

Create an easier experience in Concur Travel by guiding travelers throughout the booking process with relevant information presented inline or as a pop-up based on display criteria, such as destination or vendor. This helps drive travel policy compliance and enforce duty of care.

- Message travelers during the booking process in almost all areas and customize Concur Travel default messages.

- Examples include when employees are non-compliant in bookings with Concur Travel, or when a trip is planned, but a hotel is not booked.

- The custom text area is under “Travel Policy Administration.”

Customer tip
Share trip

Allow your travelers to share a booked trip through Concur Travel with another user when traveling together.

- This creates an easy way for the user to copy the itinerary and share it while still allowing for changes such as dates.
- Explore tip #137 for sharing travel plans with your whole team.
Promote traveler features with TriplT

The TriplT mobile app is an essential part of Concur TripLink, and many features were released throughout 2018 that your travelers will only find in the app.

▪ TripIt shortcuts for Siri, airport security wait times, international travel tools, and interactive airport maps help maximize traveler productivity and satisfaction.

▪ Encourage your travelers to download TripIt to see what makes it a top-rated travel app.

▪ Need help driving adoption for Concur TripLink? Check out tip #9.
You need to be able to locate and communicate with all of your employees in the case of a personal or large scale emergency.

- Create preparedness plans for medical, weather, and violent emergencies that happen at the office or while traveling.

- Maintain contracts for health, security and travel assistance services.

- Consider adopting a mobile application or tool that would allow your employees to check in, improving duty of care. Concur Locate with Active Monitoring might be right for your organization.
Tips and Tricks:

Compliance and Fraud
Excessive personal car mileage

The “Excessive Personal Car Mileage” report will give you a list of the people who have spent the most for personal mileage versus car rentals.

- Develop a mileage threshold where they should be renting a car instead.
- There could be cost savings, but also consider safety issues.
Automate mileage reporting

Put an end to self-reported mileage by using GPS tracking through the SAP Concur mobile app.

- Configure Concur Drive to track journeys automatically on the days and times that users drive for work. Set and forget!

- To improve the accuracy of mileage reimbursements across all your drivers, consider calculating reimbursements using both fixed and variable rates (FAVR) per driver.
Multi-jurisdiction tax exposure

Protect your own organization’s exposure to audit.

- State and federal governments are increasingly pursuing revenue from nonresident travelers and companies.
- Increasingly, employers need to document how many days employees spend working outside their home jurisdiction.
- Manage multi-jurisdiction tax exposures with Monaeo and EY in the SAP Concur App Center.
Industry experts recommend auditing 100% of expenses to achieve comprehensive fraud mitigation and policy compliance.

- Many organizations leverage artificial intelligence to automatically review 100 percent of expenses pre-payment for policy, VAT, receipt substantiation, and fraud / anomaly patterns.

- Human intervention can provide additional context, review of high risk expenses, and more.

- [Concur Detect by AppZen](#) could help your organization scale your audit program through artificial intelligence.
Tracking ancillary fees

Use the airline ancillary fee expense type by enabling the fee-type drop list provided by SAP Concur software. The data flows into reporting to enable ancillary fee reports on expenses. Configure this into the system.

- Configure a minimum and maximum expense threshold for specific suppliers and ask users to assign that expense to the correct ancillary fee type.

- For example, assume anything coming from an airline such as Delta that is under US$75 to be an ancillary fee.
It’s important to understand if your hard-earned negotiated rates are being honored.

- Review the “Past Reservations with Rates in Excess of Negotiated Rate” report to determine potential refunds you can request from the vendor.

- Then do the same for upcoming hotel stays or car reservations by reviewing the “Upcoming Hotel Reservations with Rates in Excess of Negotiated Rate” report.
Making mobile entry easier

The SAP Concur mobile app offers Travel, Expense, and Invoice functionality that can make your users’ processes lightening fast.

- If you have many required fields, consider making some unrequired to make expense entry easier on the SAP Concur mobile app.

- Consider purchasing ExpenseIt, which integrates directly into the SAP Concur mobile app and brings itemized expenses using OCR technology, reduce lost receipts and increase productivity for your users.
Personal expenses

When a user makes a personal charge on the corporate card, create an audit rule to require a comment to describe the reason for the error.

- Consider setting an email reminder the day after an expense report has been sent for payment when the reports had a personal expense on it. (Standard Edition only allows with Custom Audit rules). This is a great way to remind users to pay their card back.

- Additionally, consider the Redirect Funds feature (Professional edition only).

- Lastly, cut costs and optimize cash flow by using Expense Pay to automate the reconciliation process with employees and card providers.
Throughout the year

As you’re working each day to enhance your travel and spend programs, consider sending us more tips, tricks, or best practices.

E-mail tips@concur.com at any time.

Maybe next year you’ll see your tip up here on the big screen!
Engage with the SAP Business Exchange

Stop by the Community Engagement space in the SAP Concur Booth (Expo Hall) and discover the best ways to get involved with the SAP Concur community!

Connect with your peers on the SAP Business Exchange: sap-business-exchange.com

Share your feedback by joining the Voice of the Customer program: VOCInsights@sap.com

Discover the impact of your feedback: Visit concur.com/cx
Tips and Tricks:

Questions and Ideas?

Any favorite tips or tricks we missed?
Thank You!