Tips, Tricks, and Resources for Rolling Out
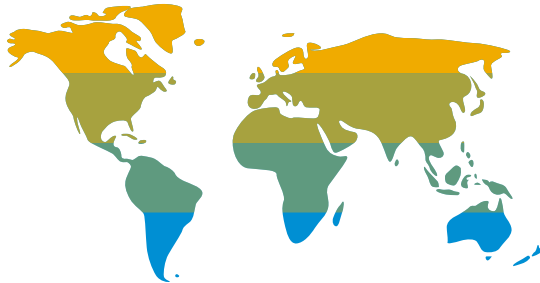# SAP Concur

Let's get started!

Here's Your Map to Success

Ready to Roll Out SAP Concur and Not Sure Where to Start?
We talked to the people who know how to do this best, including some of your most successful peers, to uncover the nuts and bolts of what you need to know.

Follow the advice in this guide, and you'll be on your way to becoming a hero in your organisation!

Know What Matters Most

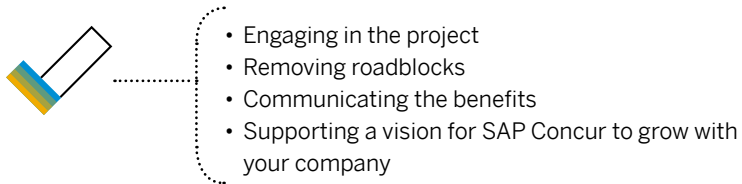**Start with Change Management and Executive Sponsorship**

Change Management
People rarely love change. With a solid plan, you can help your employees understand what to expect and get them excited about SAP Concur.

Start as early as possible with our **Change Management Guide**.

Executive Sponsorship
Strong executive sponsorship creates a path to success:

- Engaging in the project
- Removing roadblocks
- Communicating the benefits
- Supporting a vision for SAP Concur to grow with your company

Typically, executive sponsors were involved in selecting SAP Concur, signed the contract and have enough influence in your organisation to drive impact.

Rally Your Team
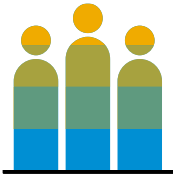
Executive Sponsor
- Typically the purchaser, they want to see value for their investment and ensure a successful deployment.
- Identifies and removes internal barriers.
- Acts as an internal cheerleader to encourage stakeholder buy-in and user adoption.

Validation Team
- Helps test your solution.
- Identifies end user questions and concerns.
- Typically at least 7–10 members, including:
  - Heavy users
  - Executive assistants
  - Accounts Payable
  - An end user for each policy or group
 - Users with and without corporate cards

Administrators
- Responsible for knowing how to use the product inside and out.
- Develops and implements deployment plans.
- Provides ongoing troubleshooting and oversight of the service and user access.
- Tip! Have more than one Administrator.

Internal Support Team
- Assists end users in organisations without the User Support Desk service.
- Your designated Authorized Support Contacts (minimum of two, maximum of five) may also work with Customer Support on behalf of your employees.
- In many cases, the support function may be performed by the Administrator.

* Other cross-functional roles that may participate in your rollout include IT, Treasury, Internal Audit and HR.

SAP Concur is Here to Help
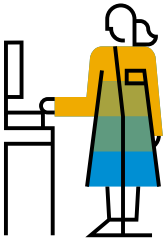
Customer Support
- Upon Transition to Support this is your first stop for all product questions, technical questions and configuration changes.
- Assists up to five individuals who you've designated as Authorized Support Contacts (ASCs).

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

Client Development
- Your strategic business partner to understand .your goals and objectives.
- Will work with you to to establish a unique way forward plan to optimise 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 as-sistance for end users.
- Service Administration provides guidance on best practices and product updates.
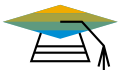
Go From Basics to Brilliant

Your team has the most important role in this deployment. The most successful Administrators attend trainings and stay up to date with the latest SAP Concur updates.

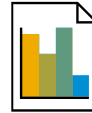## Learn to Administer

Administrator Toolkit
From user administration to processing purchase orders, these short videos will help you know what to do in just minutes.

Learning Series
These live and recorded online classes help you keep your skills sharp.

Look Like a Genius

Reporting Training
Unleash the power of all the data you're capturing! Look at your overall spend and show your leadership the ROI on their investment. Our reporting classes will show you how.

Release Notes
Product release notes keep you current on the newest features and improvements. Administrator summaries are available **here**.

Help Us Help You

When you finish implementation, Customer Support will be there.

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

Read the **Getting the Most from Concur Customer Support** for how to best use Customer Support for key tasks.

Review the **How to Navigate the 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.

Want More Help?
Attend a "Resources for New Admins" training available through the **Customer Learning Series** (or view a recording).

Know What You're Getting

Understand your contract and billing terms:

Contract Terms
• Review your Order Form (OF), and keep it handy for future reference. Your OF includes your billing terms (now located in the Concur Supplement as well) and outlines what products and features you purchased. The full terms and conditions of your contract are in your General Terms and Conditions.
• If you still have questions, ask your Implementation Project Manager or Client Development.

Billing
• We use two types of billing. During implementation, you're billed at a lower, pre-production rate. After you move into production, you'll be billed at the full rate outlined in your Order Form.
• To ensure uninterrupted service, you'll want to identify who will be paying your invoices.
• Once your designated ASC has successfully logged onto the Support Portal, he or she will be able to access your billing information by clicking on the Billing tab from the homepage.

Questions
If you still have billing questions, send a message to ARCustomerSupport@concur.com.

Expect Change

Prepare for It

Change Management Guide
Step-by-step advice for creating a strong change management plan.

Develop a Training Approach
Include training methods, delivery, curriculum and how to locate resources.

Manage It

Communication Plan
Target the right audience at the right time with the right vehicle and messaging.

User Library
Training videos to help your employees perform common tasks.

Run With It

Training Administration Demo
A self-guided demonstration of how to customise your Training Portal.

Mobile Administration
Resources for communicating SAP Concur Mobile's benefits and features.

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

3...2...1...Go

Success is 90% planning and 10% execution. Develop a plan for each of these phases:

Validate
Validating with a small team helps you work out any kinks and understand what questions to expect from end users. At a minimum be sure to test the following:
- Submitting and reimbursing expense reports
- Paying invoices
- Data imports from credit cards and Human Resources

Deploy
Decide whether a staggered or one-time rollout works best for your organisation.
- A **one-time rollout** lets you maximise your ROI, faster.
- A **staggered rollout** allows you to train your teams as they deploy and prepare your support team over time as users come on board.
- **Simplify your user's access** to SAP Concur and other cloud apps with single sign-on that's scalable and secure, inquire here.

Support
Before you roll out to your employees, think about how you'll support them when they have questions.
- Will you provide email or phone support to your users?
- How will you staff support so users can get help when they need it?
- If you're concerned about your ability to support all your users, contact Client Development to discuss the User Support Desk service.
- Who will be a backup contact?

Create an email alias strictly for user support questions (e.g., concur@yourcompany.com).

From Your Peers...

Have the Right Team
"Make sure to include both IT and business functional experts in your core team."
"Have more than one person fully trained to be an Administrator to support end users when you're not available, or in case of a job change."

Ensure User Adoption
"Keep your Executive Sponsor engaged so he or she can champion adoption across your organisation."
"Record training sessions for your users and upload them with the Training Administration tool."
"Communicate early and often with employees so they know what to expect."

Make It Your Own
"Validate SAP Concur with users outside your core team to identify what questions your other departments will have."
"Create a custom FAQ document or cheat sheet based on the questions from your testers."
"Tailor the internal resources available to your employees with the Training Administration tool."

Stay In Control
"Ensure you've completed necessary Administrator training before rolling SAP Concur out to your users."
"Stay up to date by reviewing product release notes on the Support Portal and attending SAP Concur webinars."
"We purchased Service Administration and User Support Desk services to help shoulder the load so we can focus on our business."

Watch Out for These Pitfalls

User Frustration

Switching to SAP Concur seems like a lot of work
Avoid this by executing a detailed change management plan and keeping your employees accountable for taking training.

I don't know how to get my questions answered
Make sure you've trained your users and have a support plan.

Stakeholder Misalignment

This is affecting the workload of my department
Include teams like IT, Finance and Accounting to ensure proper communication so they understand how they'll be impacted and how SAP Concur will integrate with other systems.

I'm looking for a good ROI on SAP Concur
Encourage stakeholder adoption, analysis of key metrics, and review your contract so you know what you bought.

Administrator Headaches

Configuration changes are adding stress to deployment
Avoid this by knowing exactly what you want out of SAP Concur before you go live.

We're getting too many questions
Make sure you've clearly designated roles so your team members know how to respond.

I'm not sure when to turn to Customer Support
Make sure you know what to expect by reviewing the **Know This** section of this document.

Get the Help You Need

Know your options:

Support Portal
Your Concur Support Portal includes **Knowledge Base**, **Chat Support**, **technical documentation** and more. If you still have questions about your configuration or new features, you can also **create a case** on the Support Portal, and Customer Support will come to the rescue.
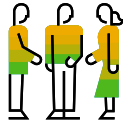
Your Peers
Thousands of others have been in your shoes. Get help from people who have been there before through **User Groups** organised by Client Development, and the **SAP Concur Community**.
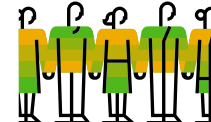
Your SAP Concur Team
Customer Support, Client Development and Client Sales want you to be successful. Turn to them for assistance – they are there to help!

Consider Service Administration. This service provides access to guidance on best practices, insight into monthly releases and help with acceleration of new feature adoption.

Let's Keep in Touch

We'll be partners long after implementation, so we thought you should know how to stay in touch.

Connect with us and with your peers

SAP Concur Fusion + SAP Concur Fusion Exchange
[SAP Concur Fusion](#), our annual client conference, offers great networking and learning opportunities.
[SAP Concur Fusion Exchange](#) delivers added value to clients in select cities all year.

User Groups
Organised with Client Development, [user groups](#) provide an ongoing network to share best practices and ask questions.

SAP Concur Community
Discuss with thousands of your peers in our client-only group to connect, share and collaborate.
[Join 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, customers come first. We listen to you and learn how we can improve our products and service so your experience keeps getting better. Learn more and provide feedback on our [webpage.](#)

Consider the Possibilities

As you move along your journey as a SAP Concur client, your needs and strategic goals will shift over time. SAP Concur has the tools to help you optimise your solution and be proactive towards future needs.
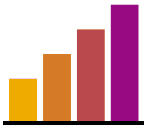
Productivity
Now that you're in the first steps of automating your processes, make it easy for employees to comply with internal policies. This will allow them to stay pro-ductive and focus on what matters most.

Learn more **here** how SAP Concur can help increase organisation-wide productivity.

Visibility and Compliance
Employees make purchase decisions on behalf of the company every day. Visibility into spend data allows you to make informed financial decisions.

Find out **here** how SAP Concur can help you move beyond automation and get actionable insight into company-wide spend and compliance data.

Growth
Growth is inevitable. Whether by in-creased headcount or expansion into a new market, growth can make it difficult to control spend and maintain efficient processes.

See **how** you can scale your processes and policies with the help of SAP Concur.

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Learn more at concur.co.uk

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