

Admin Tips & Tricks

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Overview

As the SAP Concur admin for your organization, you will be the subject matter expert your users rely on to help run an efficient program. This guide will help you better utilize the SAP Concur solutions you own, increase user adoption, and streamline your travel and expense processes.

Ready to save time and money? Read on for our Admin Tips and Tricks.

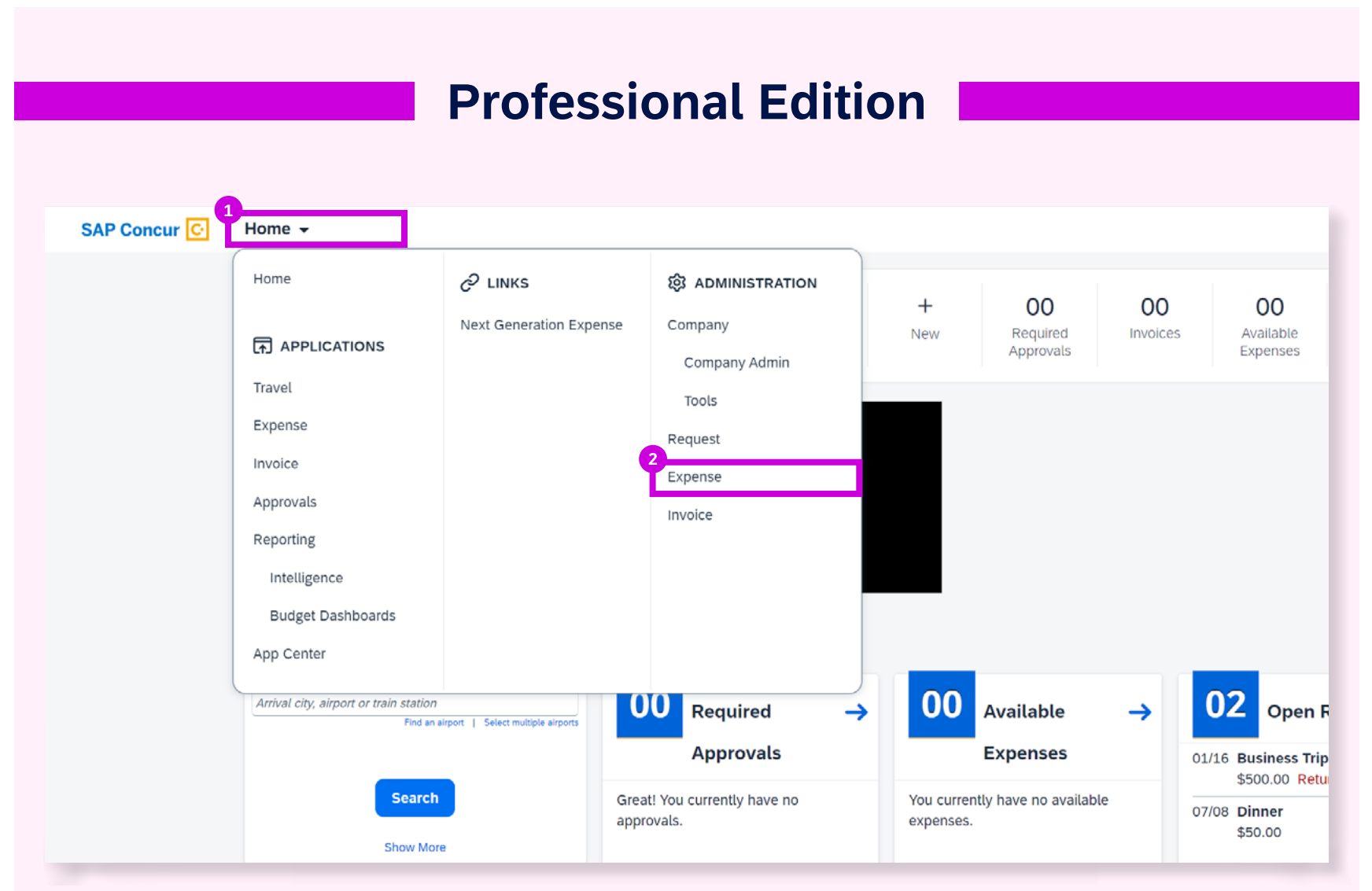
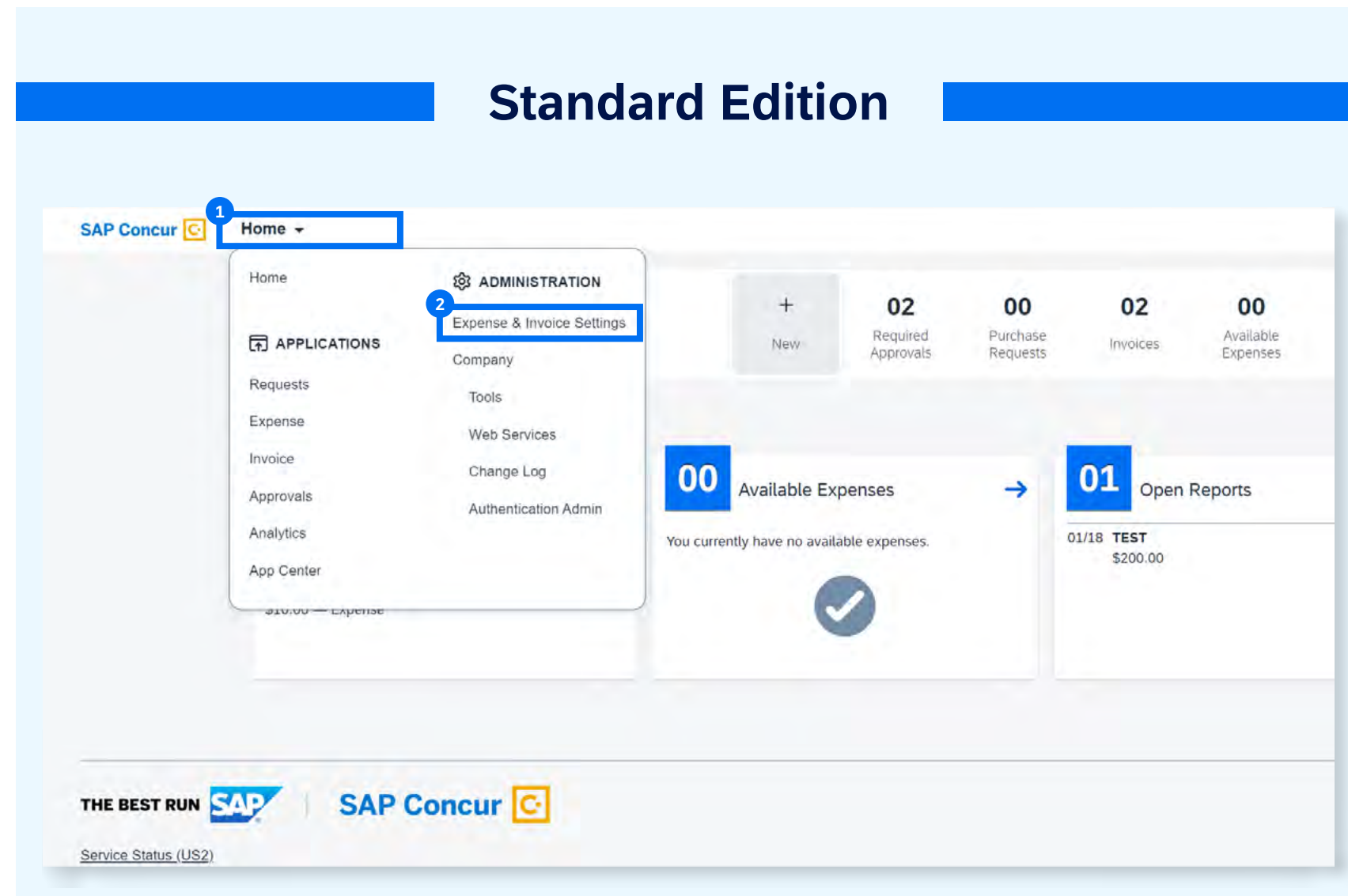
Agenda



01 | Know Your Edition

SAP Concur has two editions: **standard** and **professional**.

It is essential to know which edition of SAP Concur your organization is using so you can follow the proper instructions on completing important tasks, as the process can be different.

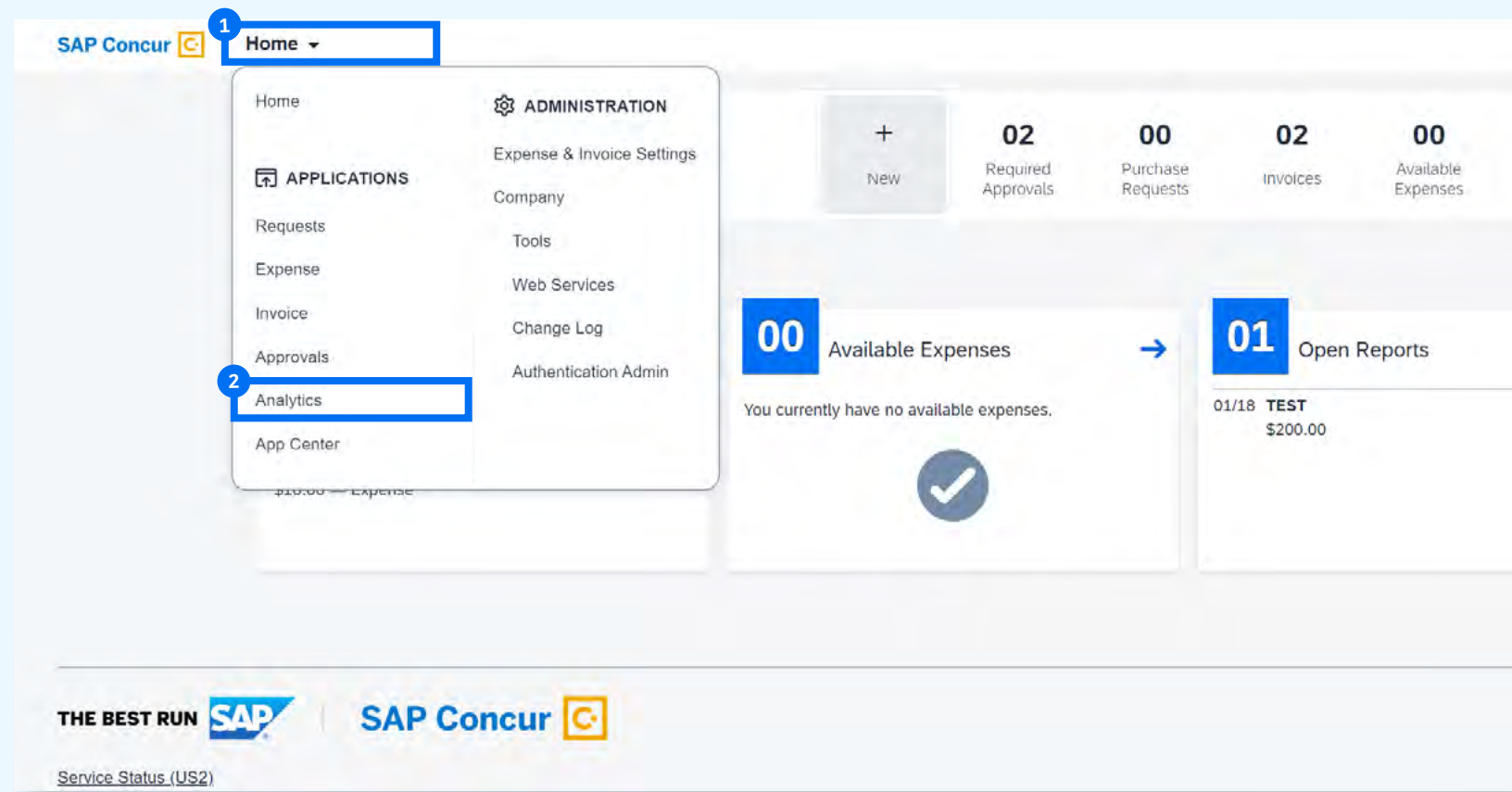


02 | Know Your Reporting Solution

SAP Concur has different reporting solutions. Each has its own capabilities structured to help your organization achieve its business goals. Report navigation will be different depending on what reporting solution you have.

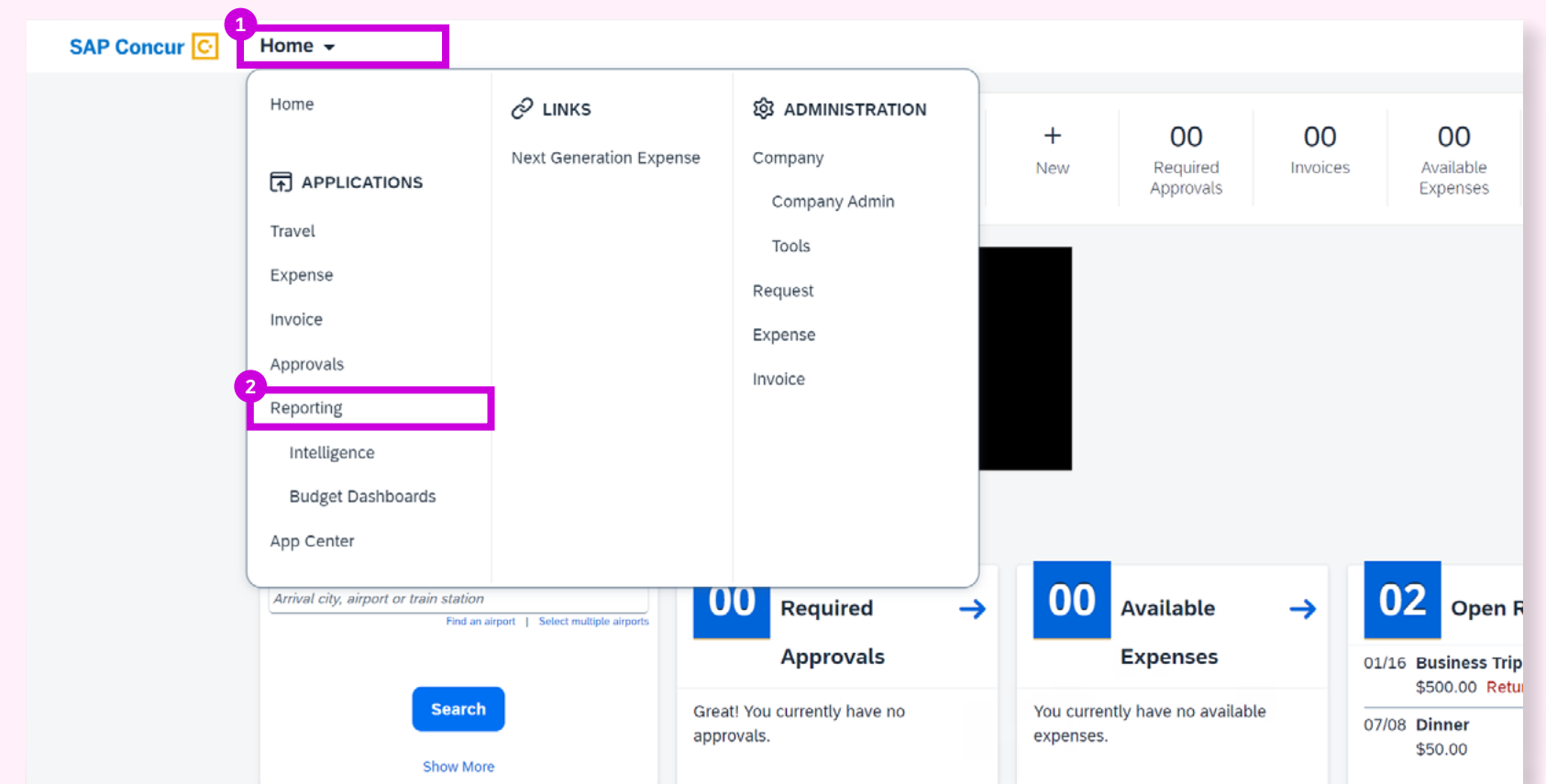
Standard Edition

If you see “**Analytics**” here, you have the **Analytics Essentials** or **Analytics** reporting solution.



Professional Edition

If you see “**Reporting**” here, you have the **Analysis**, **Intelligence** or **Consultative Intelligence** reporting solution.



03 | Assigning Authorized Support Contacts

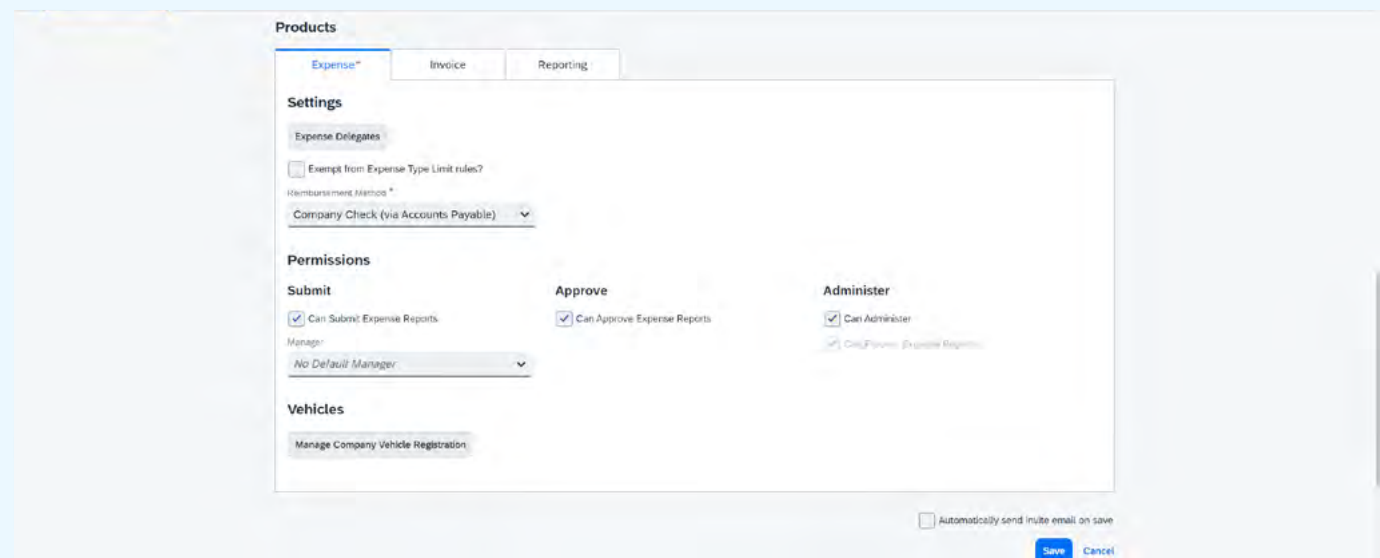
It is important to have responsible employees assigned as Authorized Support Contacts (ASCs) to help communicate necessary updates to end users.

ASCs are the only users who can request changes be made to your system. ASCs can contact Concur Support for assistance by creating a case in the SAP Concur support portal, or by chat or phone. It is recommended that 2-5 people at your organization be assigned as an ASC. Please note, if you are an admin using the **standard edition**, you are automatically assigned ASC permissions. If you are using the **professional edition**, the ASC permission would need to be granted to a user.

Standard Edition

Standard ASC assignment

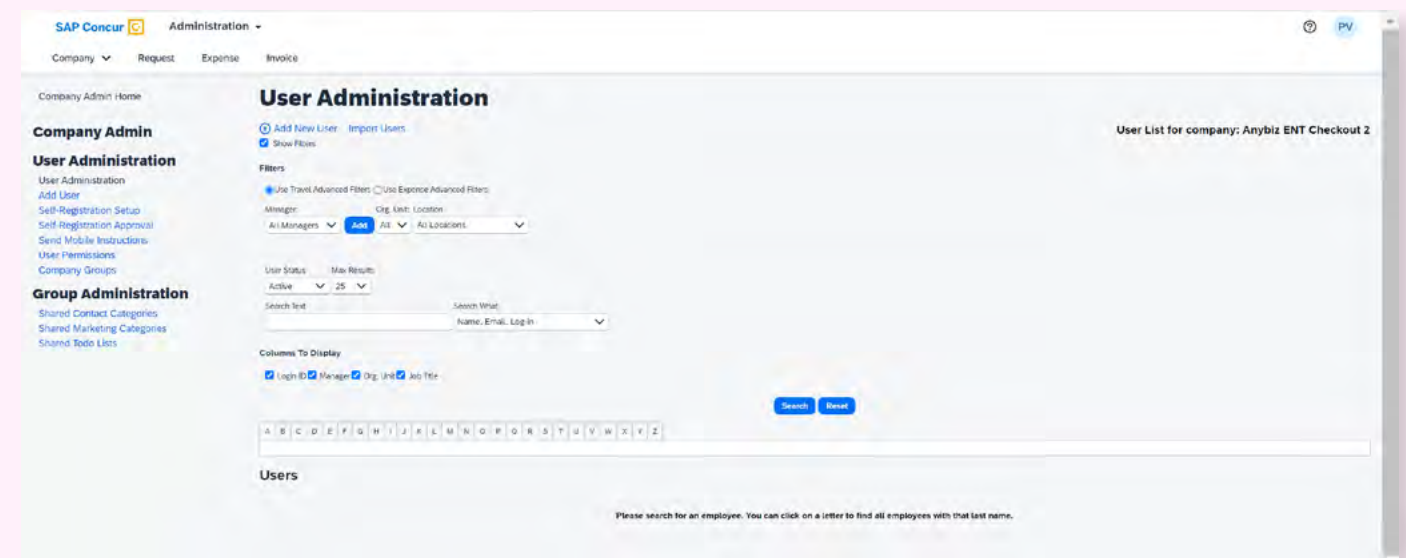
Settings > User Accounts > Choose Name > Choose Product Tab > Permissions > Can Administer > Save




Professional Edition

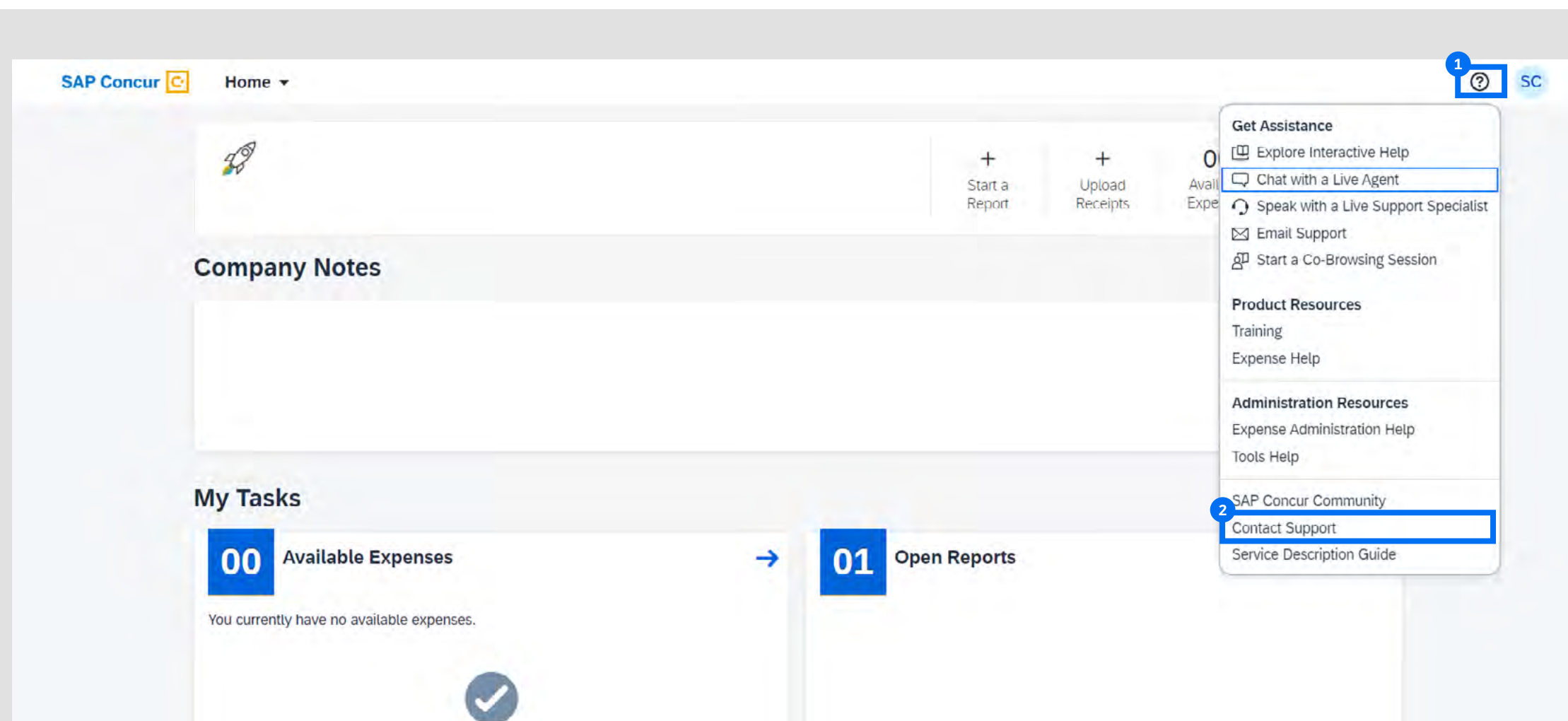
Professional ASC Assignment

Administration > Company Admin > User Administration > Search Name > Choose Name > Click Authorized Support Contact > Save



Tip - After the ASC permission is assigned, activation is required by the user.

1. Click  in the top right, then, from the dropdown select Contact Support.
2. Logging in to Concur Support for the first time triggers a User Information Confirmation form.
3. Fill out all required fields and click Save to begin accessing the Concur Support portal.



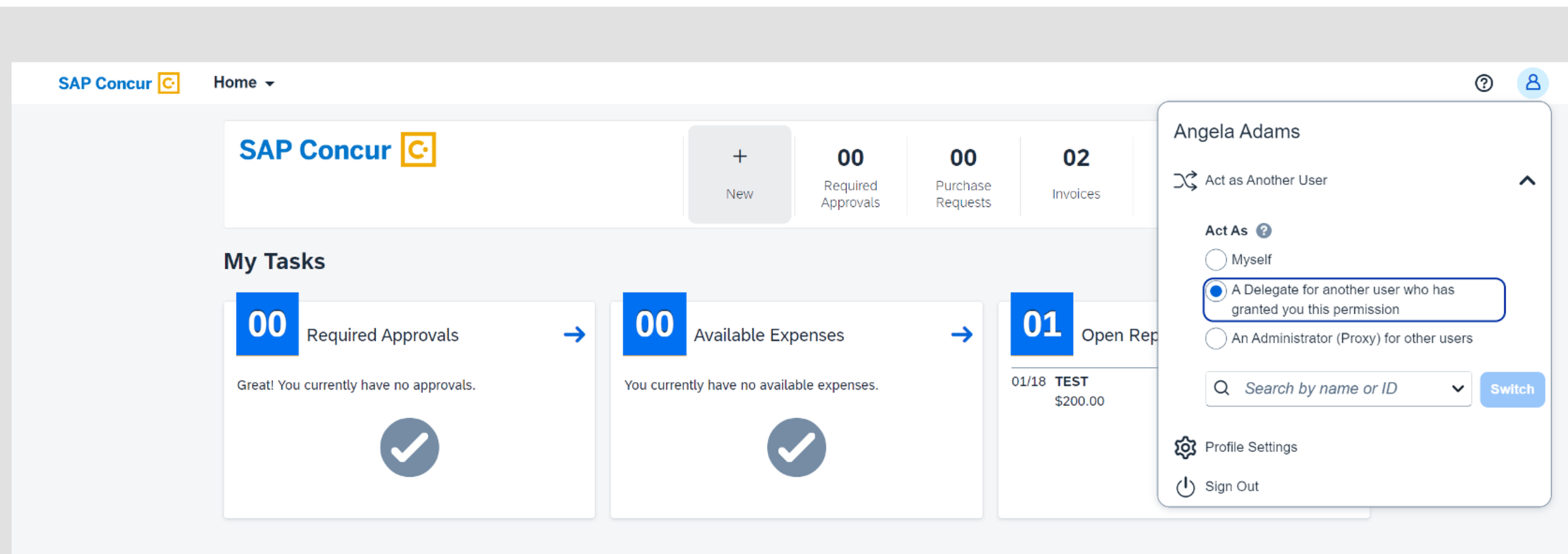
04 | Assigning a Delegate

Delegates are users who are granted permission to perform tasks such as creating, submitting, and approving expense reports on behalf of another user.

In the **standard edition**, delegate permissions can only be assigned by users themselves. In the **professional edition**, both users and Admins can assign delegate permissions.

⚠ Please note, you cannot approve an expense report you created when acting as a delegate for someone else. This is to prevent fraudulent or incorrect expense reports from being approved.

Within SAP Concur, to begin acting as a delegate, click on the profile icon at the top right of the homepage. Click on the “A Delegate for another user...” option, then enter that user’s name. Select the user from the list and click Start Session.



05 | Training and Communication

Training end users is an ongoing process that requires planning. Program rollouts, policy updates and changes, and new hire enablement all require some level of training or communication.

Training

We have many training options and teams you can work with to customize a training plan.

- Client Success Team
- Customer Support: +1 (855) 895-4815
- [SAP Concur Community](#)
- [SAP Concur Training Toolkit](#)
- [SAP Help Portal](#)
- Customized Training Options – email training@concur.com for a quote.

Communication

How you communicate your policy and training guides to your employees will vary depending on the field you're in, the type of work being done, and how folks interact with company-wide emails. Here are a few ideas we have seen work well:

- Emails – keep them short and to the point. Use email subject lines only if possible.
- Create Champions – select a few people to gather input and feedback from users to bring back to the policy stakeholders.
- Workshops – as you roll out new parts of the policy or program, setting up virtual or in-person workshops can be effective.
- Admin Office Hours – for continuing ed or answering questions, setting up recurring office hours for new users especially can be helpful for them and for the admins in reducing one-off emails, phone calls for help, etc.