Getting the Most from Concur Client Support

Concurforce & Standard Editions

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Overview

Concur Client Support provides assistance for up to five company-designated contacts as stated in your Service Description Guide. A minimum of two contacts are required to be designated as Authorized Support Contacts (ASC) to .grant access to the Concur Support Portal, chat and phone support.

Once the ASC access is assigned, the Contact Support link will appear within the Concur product on the Help tab for convenient access to the Concur Support Portal via Single Sign-On (SSO). When transferring to the Concur Support Portal for the first time, the User Information Confirmation box will display for user security validation and updates. Upon validation, the distribution of Service Alert emails will be automatically enabled, and ASCs will be notified when their Concur services are affected. The information may be viewed or modified under My Profile on the Concur Support Portal Home page.

When a case is created, it is assigned to a Client Support team dedicated to help a specific group of clients. A priority level is also assigned to each case based on Concur's internal guidelines and the severity of impact.

Client Support Representatives are responsible for cases from the time of submission to resolution. You can expect to receive case updates from the assigned representative even when consultations with other Concur specialists and/or escalations to other departments are necessary.

The Client Support agreement provides the following benefits:

- Access to the Concur Support Portal for Authorized Support Contacts
    - The Concur Support Portal is a client service and information center focused on providing client self-service tools, timely and informative communications, as well as opportunities to interact among client peers.
    - On the portal, you may contact us for service, search our Knowledge Base, access resource and training materials, participate in the Community, read about news and upcoming events and submit service enhancement ideas through Solution Suggestions.
- Chat and Phone Support access for Authorized Support Contacts

Authorized Support Contact Management

Upon transition from Implementation to Client Support, Concur will initially assign the ASC access to the required two and up to five company-designated contacts. Thereafter, additional ASC access (for a maximum total of five) will be managed by your company's Concur Administrators.

There are two options to manage the access for Authorized Support Contacts:

1. ASC Access and Incident Report via Company Groups (Best Practice)
2. ASC Access only via User Permissions

Option 1: Authorized Support Contact Company Group

BEST PRACTICE

This option grants access to Client Support and allows visibility to the Reporting tab where the Incident Report is located. This report provides information on current, unresolved and past Service alerts along with root cause, detection and prevention details.

NOTE: If Company Groups is not available, please contact Client Support for assistance.

Concur Administrators manage the Authorized Support Contact Group by following this procedure:

1. Log into Concur at: www.concursolutions.com or through SSO.
2. Navigate to: Administration > Company Admin > Company Groups.
3. Under **Action**, click **Edit** next to the Authorized Support Contact Group.
4. Find and select the user to update and click **Add to Group** or **Remove from Group.**
5. Click **Save**.

Option 2: Authorized Support Contact Permission via User Permissions

This option grants access to the Client Support Portal *without* granting access to the Incident Report.

Concur Administrators manage the ASC permission by following this procedure:

1. Log into Concur at: www.concursolutions.com or through SSO.
2. Navigate to Setup > Users.
3. In the **Search** box, enter the user's data and click the **magnifying glass** icon.
4. To open, double click on the user's name.
5. Scroll to the **User Permissions** section.
6. Select **Can Administer** (Expense or Travel) or **Is Invoice Admin** (Invoice) or **Travel & Expense Administrator** (Travel and Expense).
7. Click **Save**.

Request Support

We ask you please refrain from contacting Client Support until you have been advised by your Implementation Project Manager (IPM) that you have been transitioned to Client Support. When cases are created prior to transition, they are closed and you will be directed back to your IPM to review your questions.

To report an issue, ask a question or make a request, you should create a case. The preferred method for case creation is on the Concur Support Portal. Regardless of the complexity, this provides the most efficient results and allows you to provide detailed information and attach any relevant documents.

Before creating a case on the Concur Support Portal or contacting Client Support, review the Knowledge Base for answers and check your email for a Service Alert.

For Client Support to resolve an issue, the steps to reproduce the issue must be provided. Where possible, copy and paste information from your Concur product into cases for complicated items such as report IDs or job numbers to ensure accuracy.

Choosing the most appropriate Topic, Case Type, or Case Sub-Type will ensure your case is routed without delays to the Support team best suited to handle your request.

Chat and Phone Support are most effective when reserved for rudimentary questions that can be quickly answered. If you choose to chat or call, be prepared to provide your name, company name, product/service, the answer to one of your security questions and all case details. The representative will create a case to document what transpired.

NOTE: End users calling Client Support will be advised to contact an Authorized Support Contact unless your company has purchased the User Support Desk (USD) service. For companies that have purchased the User Support Desk service, the Support link is visible to all end users to search the Knowledge Base, chat with Support or create a case.

Contact Information

During Chat Support hours, click on **Chat with Support** from the Home page. The Concur Chat Support dialog box will display while waiting for the representative to accept the chat. If all representatives are engaged with other clients, a message will display asking you to please check back in a few minutes.

When calling Client Support, your call may route to voicemail or the option to route to voicemail may be given if all representatives are on the phone with other clients. Please do not hang up. We will return your call promptly if you leave your name, phone number and company name. If calling about a specific case, please leave the case number.

After 4pm PT Friday or on weekends, a message may be left and will be handled when normal business hours resume. If your site is down, select "1" to leave a message and provide your name, phone number and company name along with the details of your site down issue. You do not need to take further action or speak directly with a Support Representative. Your detailed message will be sent directly to Operations for review and to take action for resolution or escalation.

Maintenance Windows

If users experience slower than normal performance or service unavailable during Concur's standard Friday night maintenance windows, it is not necessary to contact Support. When a planned outage is known rendering the service unavailable for an expected 60 minutes or more, ASCs will be notified.

North America Data Center: 9 PM to 1 AM PT

EMEA Data Center: 9 PM to 1 AM GMT (GMT+1 during Daylight Saving Time)

Chat with Support Monday – Friday 7 AM – 1 PM PT Excludes US Government Holidays		
Americas Monday - Friday 5 AM - 4 PM PT	**Expense & Invoice Support** +1 877 901 4960 - USA & Canada **Expense, Invoice & Travel Support** Toll Free: 018000835525 **-** Mexico	**Travel Support** +1 877 812 5060 - USA & Canada
Asia Pacific Australia Monday – Friday 9 AM - 6 PM AEST/AEDT	**Expense, Invoice & Travel Support** +61 (02) 9113 7319 - All APA **Expense, Invoice & Travel Support** +800 2555 6311 Australia, China, Hong Kong, Japan, Malaysia, New Zealand, Philippines, Singapore, South Korea, Taiwan & Thailand 001803442494 - Indonesia 120 11520 - Vietnam	
Europe Monday - Friday 9 AM - 6 PM GMT+1	**Expense, Invoice & Travel Support** +800 2221 8787 *(voice prompts provided for language choice)* Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Slovak Republic, Spain, Sweden, United Kingdom **Direct Numbers:** +44 1753 50 1777 - Mainland Europe 01753 50 1777 - United Kingdom 0805 542 523 - France 0800 723 8605 - Germany	

Client Support Australia number 61291137319 to be replaced by inContact number **61288803271**. Old number to be disconnected on 6/15.
Client Support Czech Republic number 420212220899 to be replaced by inContact number **420296181618**. Old number to be disconnected on 6/15.
Client Support United Kingdom number 441753501777 to be replaced by inContact number **442037936932**. Old number to be disconnected on 6/15.
User Support Desk United Kingdom number 441753501785 to be replaced by inContact number **442037936933**. Old number to be disconnected on 6/15.
User Support Desk United Kingdom number 441753501790 to be replaced by inContact number **442037936933**. Old number to be disconnected on 6/15.

Service Alert Emails and Incident Report

Authorized Support Contacts automatically will receive Service Alert emails when their Concur services are affected or when a large impacting event occurs.

In instances when we are unable to determine specific clients affected, the Service Alert email will reference a "subset of clients" which means your service may or may not be impacted. The Service Alerts, along with the Incident Report, are the ASCs' resources to review and track known issues.

NOTE: It is not necessary to contact Client Support if we are aware of an issue or during the standard Friday night maintenance windows.

To opt-out of Service Alert emails, uncheck the "Opt Out of Service Alert Emails" from My Profile.

Service Alert Emails

Authorized Support Contacts will receive a Service Alert email from Concur Support – Service Alerts concursupport-servicealerts@concur.com. The email subject will contain the type of Alert and the OPI number (Operations Incident).

There are four types of Alerts that may apply to an issue:

1. **Alert:** States the issue.
2. **Alert Update:** Provides additional information when the issue is on-going.
3. **Alert Resolved:** Advises the issue has been resolved.
4. **After the Fact Alert Resolved:** Advises an issue was identified and resolved before the Service Alert email could be sent. The times the issue occurred are included.

NOTE: Please add ***.concursolutions.com**, ***.concur.com** and ***.amazonses.com** as trusted sites (whitelist) in your email program to prevent emails from going to your Junk/Spam folders.

Root Cause Analysis

Our Operations team works diligently to provide the Root Cause Analysis (RCA) for each Operations Incident (OPI) in a timely manner. The RCA identifies the cause of the OPI and any detection or prevention measures implemented. The investigation to complete the RCA depends upon the complexity of the OPI. Once completed, the Incident Report is updated and the Incident Root Cause Analysis is emailed to the Authorized Support Contacts (ASC) who received the Service Alert(s).

Incident Report

To view current, unresolved and past incidents along with the root cause, detection and prevention details, follow this path within Concur: Reporting > Travel Reports > General > Incidents.

1. Click on the **Reporting** tab

2. From this tab, click the **Travel Reports** link
3. Scroll down to the **General** section on the left
4. Click on **Incidents** (refer to screenshot on next page)

Upon opening the report, if there is a current, unresolved Alert, it will be displayed in the Real-time Alert box located in the upper right hand corner of the page, outlined in red. The Alert will be displayed until resolved. The day after the incident is resolved; the Incident Report will be updated. Once Operations completes their investigation into the root cause, the Incident Root Cause Analysis email will be sent and posted to the report for the Concur identified incidents.

To view the Incident Report, you must click the **Submit** button. The report default setting is by month; however, other options include searching by quarter, year to date, a single date or a date range.

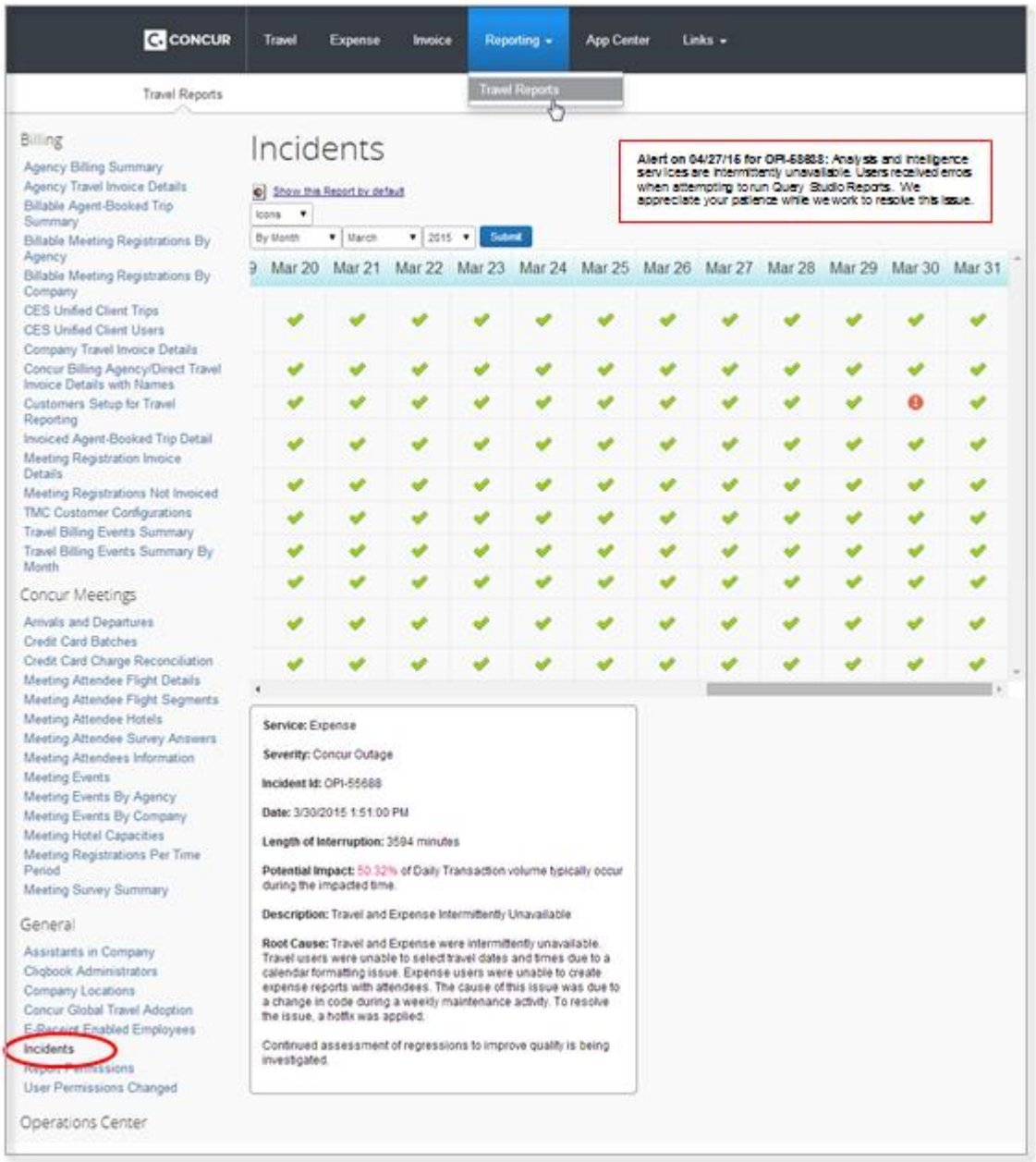
To view the details of a particular incident, click on one of the icons and a box will display at the bottom with additional information.

Icon Legend:


Green – Available and running normally


Yellow – 3rd Party Incident


Red – Concur Incident



Priority Levels and Targeted Resolution Timeframes

Cases are assigned priority levels to indicate the level of severity, which reflects the maximum length of time for initial acknowledgement and targeted resolution timeframes. However, if resolution requires Research and Development resources, the targeted resolution is as Concur reasonably determines to be appropriate under the circumstances.

The table below defines each of these timeframes for each priority level:

Level	Definition of Priority Level	Client Support Responsiveness	Targeted Resolution (upon incident identification)
Priority 1 (P1)	This status is reserved for severe problems in a production environment – i.e., production is down, transactions are halted throughout the organization, and there is no work-around.	A Client Support Representative will reply to contact within **1 business hour** upon receipt of a Priority 1 case informing the case owner that the case has been received.	Within **4 hours**
Priority 2 (P2)	Business-impeding problem in a production environment. A major function is experiencing a reproducible problem which causes major inconvenience; common operations fail consistently.	A Client Support Representative will reply to contact within **4 business hours** upon receipt of a Priority 2 case informing the client that the case has been received.	Within **8 business hours**
Priority 3 (P3)	A fundamental function is experiencing an intermittent problem, a common operation sometimes fails or a less common operation fails consistently but the customer can continue with business as usual while the problem is being addressed.	A Client Support Representative will reply to contact within **8 business hours** upon receipt of a Priority 3 case informing the client that the case has been received.	Within **24 business hours**

Escalation Process

Client Support may need to escalate your case to other departments within Concur. In these instances, the assigned representative remains responsible for providing you with case updates.

If Concur is unable to resolve P1, P2, or P3 cases in accordance with the respective targeted resolution timeframes set forth above, Concur will continue to work diligently until the case is resolved.

In the unlikely event you do not receive a response from Support within the established timeframe, please ask for an update in the Case Comment section. Then, if you feel the case needs to be escalated, click **Escalate** 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 whether the case was initially submitted on the Concur Support Portal, via chat or by phone.

Create a Case

1. From your Concur product, click the **Support** link to access the Concur Support Portal.
2. From the Concur Support Home page, click **Create a Case**.
3. Enter details in the **Case Description** field including steps to reproduce an issue, unique identifiers, date and time information, impacted users, or other details pertinent to the case.
4. Enter a brief description of the case in the **Subject** field.
    - If relevant articles are available based on your subject, articles will display in the **Suggested Articles** section. To review, click the article link and a new window will open.
        - If the article answers your question, click **Yes – Take me to the Knowledge Base** or navigate to another tab on the Concur Support Portal.
        - If your question has not been answered, click **No – I want to log a Case**.
    - If no relevant articles display, click **Continue Creating a Case**.
5. Select the **Service Admin** box, if your company has purchased the Service Administration service and you want the case to route to the Service Administration queue.
6. Select the most appropriate **Topic, Case Type** and **Case Sub-Type** from the drop down lists.
7. Select the most appropriate **Severity** from the drop down list.
8. Select the appropriate **Case Region**.
9. Enter the **Site/URL/Acct.** # if applicable.
10. If you want a Client Support Representative to call you before they start working your case, select the **Call Me** box. Please ensure your correct phone number is in your profile.
11. Enter additional email addresses in the **CC Email** field to include others on updates from Client Support.
12. Click **Submit & Add Attachments** to attach any documentation that can assist Client Support in case resolution. Follow the 3 steps to attach a file. Each file is limited to 25 MB.
13. Click **Submit** and a case number will be assigned.

NOTE: For Data files, the preferred method is to upload the import or export job file to your FTP site without encryption. This allows Support to access and view files in a secure manner. Additionally, do not attach files with sensitive data such as complete credit card or social security numbers.

View Cases

1. To view submitted cases, click the **Support** tab along the top menu bar.
2. Click **View Cases.**
3. From the **View** drop down list, choose from:
    - All Open Admin Cases
    - All Closed Admin Cases
    - All Open End User Cases*
    - *All Closed End User Cases*
    - Recently Viewed Cases

**Data is only available if the User Support Desk service has been purchased. If purchased, please do not edit End User cases since they are in Support hands.*

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 follow the 3 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, click the **Printable View** link.

Pending Client Statuses

Pending Client Comment

If Client Support requires additional information to resolve a case, the status will change to Pending Client Comment. The Case Comments section will specify what is needed to proceed. No progress can be made until the case is updated with the requested information.

Pending Client Confirmation

Pending Client Confirmation is the final status for all cases. When clients agree to the actions taken to resolve the case, they can confirm and the case will close. Should clients choose not to respond, the case will automatically close in 10 days. However, the case can be re-opened within 7 days of closure. After that time, a new case must be created.

Download Case Report

1. To download a report, click the **Support** tab along the top menu bar.
2. Click **Download Case Report**.
3. 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
4. Click **Execute Report.**
    - Executing a report runs the query to pull the requested data, and the data will appear on the screen.
5. Click **Download Report**.
    - Downloading a report transfers the data into an Excel file. If there are more than 250 cases, an email notification will be sent when the file has finished downloading.
    - The following columns will download into an Excel File: Subject, Case #, Date Created, Reported By, Date Last Updated, Status and Site/URL/Acct.

NOTE: The *End User Cases* report type is only available to download if the User Support Desk service has been purchased.

Are We Meeting Your Expectations

For every case closed by Client Support, a Closed Case Satisfaction Survey is sent via email. This survey is designed to give you an opportunity to provide feedback regarding your level of satisfaction with the knowledge and communication of the support representative and the timeliness of the resolution.

It is our goal to provide you with world-class technical support. We look forward to serving you!

Client Support Documentation & Webinars

This document is updated when changes impact support provided to our clients. A current version will be in the Knowledge Base on the Concur Support Portal. The following additional Client Support documentation and webinars are available:

Getting the Most from Concur Client Support Webinar

For a corresponding webinar, follow this path from the Support portal: Resources > Webinars > Concur Support Training.

How to Guide for Navigating the Concur Support Portal

For additional information on the Concur Support Portal, search the Knowledge Base for *the How to Guide.*

