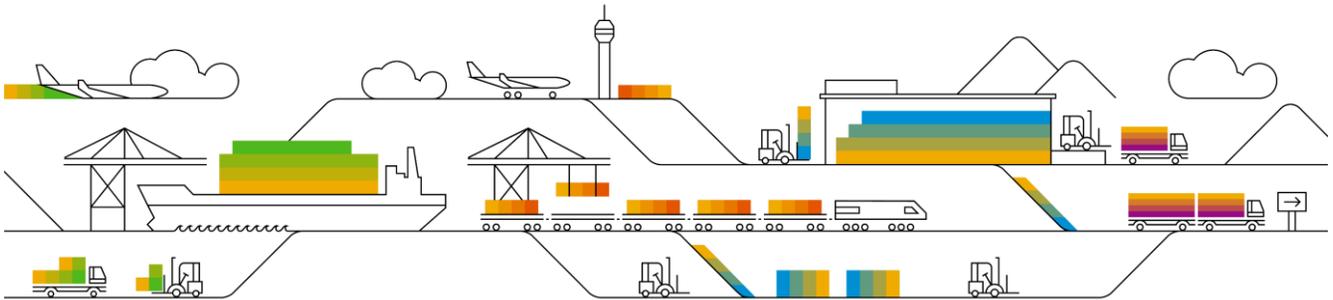# Concur TMC Services

In the fast-moving travel industry, you need solutions that pave the way to new services and revenue opportunities.

Task Manager

Concur Task Manager is a web-based tool designed to help Travel Management Companies manage their work from GDS queues, Email or Excel. Task Manager prioritizes and delivers tasks to assigned agents based on their skill set. Travel Agents no longer need to cycle GDS queues or Email to identify which tasks they should work next. All time is tracked, allowing for effective service level review, and performance management. Access to Business Intelligence software allows management teams to use Task Manager data for scheduling, billing, budgeting, and forecasting.

Business Challenges

Travel management companies require a solution to help them prioritize their workflow, including PNRs on GDS queues, email requests and miscellaneous tasks like resolving debit memos and managing phone calls.

TMC goals include issuing tickets quickly, avoiding missed ticketing deadlines and the potential loss of revenue, improving customer satisfaction and visibility into what has typically been invisible – what agents are doing, the time taken to complete tasks and the reasons why bookings required action from their agents.

Agent Challenges

Travel Agents:
- Waste time searching for the 'next' task
- Work tasks not suited to their skill set
- Cherry-pick tasks based on effort required, personal preference or vendor 'points' awarded
- Miss ticketing deadlines and SLA's

Manager/Supervisor Challenges

Management:
- Lacks insight into and control over tasks
- Lacks visibility into agent availability
- Have difficulty measuring productivity and identifying training needs
- Cannot accurately measure service levels
- Have trouble tracking errors and pay-outs

Complete tasks with speed and efficiency. Concur Task Manager improves activity workflow so your agents can focus on customers and you can optimize performance

Driving Efficiency Across Your Organization

By automatically assigning the right people to the right jobs at the right time, everyone wins. Task Manager streamlines your operational activities, making it easier to achieve your goals, service levels a healthier bottom-line.

Ideal Workflow Assignment - Automatically

Assigning tasks based on priority and individual agent's skill set means that each agent can more efficiently work queues and complete the tasks automatically selected just for them – easing operations for managers and employees alike.

Staffing Optimization made easy: easily optimize staffing to decrease agent idle time by scheduling based on task volume and agent productivity.

Task prioritization that aligns with your priorities: meeting service level agreements and service cycle times become a whole lot easier. The system prioritizes work that's most important based on your custom configuration. Tasks are assigned based on queue priority, client, agent skill set, and agent's familiarity with the client. And, all tasks can be managed across location, function, or team to meet your unique needs.

Identifying new ways to improve efficiency: by capturing time spent on breaks, in meetings, and training means that you're able to analyze where time is being spent and make more informed decisions. You can spend more time on the activities that work and cut out those that don't need so that you can deliver even more client value.

Up to the Minute Operational Overview

Access to real-time, standardized data and dashboards allows you to quickly view statistics by agent, department, client, or location. Giving you the information you need to be in control.

Unparalleled levels of visibility: Use transactional trends, agent productivity, and processing error data to continuously improve your operations.

Action based on Analytics: Tracking transaction types and exceptions allow you to identify opportunities so you can re-engineer your process, balance the workload, and deliver customized agent training, helping reduce errors and handling time.

Systems and People, Working Together

Extracting data from all GDS sources, email services, and Microsoft Excel means faster, more accurate task creation – resulting in faster task completion.

Queue prioritization tools fit the real world: To deliver the most efficient task handling possible, systems prioritize tasks in the queue based on customized configurations, but administrators can adjust priorities if needed at any time because keeping customers happy sometimes means breaking the rules

Integrations that matter to you: offering flexible 3rd party integration, and mid-office systems including Compleat, Task Manager allows for fast transaction processing from beginning to end

Optimized Workflow

By improving efficiency and streamlining activity workflows, Task Manager works hard to ensure that tasks are completed optimally while giving you added insight to continuously improve your operations. With Task Manager working behind the scenes, your agents can focus on what matters most – your travelers.

Real World Scenarios

Task Manager enables TMCs to manage effectively:

- Payments and Settlements
    - Commission Collection
    - Refunds
    - Exchanges
    - ADM/ACM Processing
    - Rate Desk
    - Settlement teams (airline payments)
    - After-hours teams
- Ticketing
    - Ticketing Failures
    - Quality Assurance
- Travelers Services
    - Phone Support
    - Schedule Changes
    - Email Response
    - Rate Desk
- Tracking and emergency situations

Task Manager diagnostics (reasons) and resolutions allow you to record detailed reasons why records are being placed onto your GDS, and Email queues.

User Features

Feature	Details
Multi-Language	English, French, and Spanish
Reset Password	The user can reset their passwords
Track Time	Tracks all time spent working and not working tasks
Serve tasks (PNRs) from all GDS	Apollo, Sabre, Abacus, Amadeus, Galileo, Worldspan
Upcoming Tasks	View what type of work will be delivered next
User Activity	Display all recent tasks, actions and time of action
Automatic Task Delivery	When the auto checkbox is enabled, tasks are served continuously
Get Task	Deliver tasks to users
Create Task	Create manual tasks (can be used for any work)
Deliver PNRs from the GDS	Serve tasks from Apollo, Galileo, Worldspan, Amadeus, and Sabre
Deliver Emails	Serve emails from any mailbox that supports POP3, IMAP, and EWS Protocol
Deliver Tasks from API	Data can be pushed to our API to have tasks created from external sources
Deliver Escalated Work	Tasks can be escalated from one virtual queue to another
Pause Tasks	Tasks can be paused and resumed
Prioritize Tasks	Priority-based task delivery system
Display Key Components of Tasks	Show user's key data from tasks (e.g. Body of email in text. Departure date of flights etc.)
Escalate Tasks	Tasks can be escalated from one virtual queue to another
Delay Tasks	Requeue feature allows tasks to be delivered at a future date and time
Dynamic Fields	When enabled by an Admin, record additional detail about the task
Display total touches per task	Show users what actions were taken on the same task previously
Tasks cannot be canceled	When a task is received, an action must be taken (increases user productivity)

Feature	Details
Track reasons for work (Diagnostics)	The user selects Diagnostic (Reason why the task is being worked)
Track actions taken (Resolutions)	The user selects Resolution (What action was taken)
Diagnostic and Resolution Filtering	Type-ahead feature narrows selection
Automatic removal of GDS PNRs	Task Manager automatically removes PNRs from GDS queues after action by a user
Automatically move completed emails	Task Manager automatically moves completed emails to a pre-designated folder on the Mail server
Record Breaks	Track Breaks, Meetings, Training, etc. and Duration
Record Unproductive Time	Time is recorded to show when users were not working

Supervisor Features

Feature	Details
Task Browser	List of all pending and recently completed tasks
Open Time/On Queue Time	Display what time task was created/opened/closed/escalated etc.
Task Status	Shows task status (Open, Closed, In progress, Paused, Delayed, Assigned)
Assign Tasks	Assign tasks directly to (Online) users.
Escalate Tasks	Tasks can be escalated from one virtual queue to another
Reopen Tasks	Reopen tasks
Task Details	View all actions/history of selected tasks
Create Task	Supervisors can create tasks for users/queues
Export to CSV	Export content to CSV
Import from CSV	Upload CSV file content. Tasks are created per csv line item
View Data by Team	Limit view to see data by Team

Feature	Details
View Data by Business Group	Limit view to see data by Business Group
Assign users to teams	Assign users to teams
Assign queues to teams	Assign queues to teams
View users for Agency	View users for Agency
User Status	Online, Offline or Break
User Skills	Display skills per user
Add/Remove Teams	Admins can restrict Supervisor ability to perform these actions
Assign/Unassign users	Assign/Unassign users to/from teams
Current Task	Display active task being worked by a user
Assign users as Primary/Secondary	Users must clear tasks from all assigned primary queues before they can receive tasks from secondary queues
Activity for Users	View recent history of tasks worked by users. Show action times, duration, Queue Name, Work Type name
Queues for Team	Show tasks on each queue for the selected team
Average Handle Time	Display the current Average Handle time for the selected team
Tasks for Queue	Show each task and queue, status and open time
Queue Volume Summary	Show volume of tasks per Queue, Queue Number, category and customer
Active Users	Display the number of active users from the total list of assigned users
Departure Date	Show departure date and time of each GDS PNR
Fare Expiration	Show fare expiration date and time of each GDS PNR
Ticketing Time Limit	Show ticketing time limit date of each GDS PNR
Validating Carrier	Show the validating carrier (airline) of each GDS PNR
Filters	Filter data by all entities (Business Group, Teams, Customers, Type, Tags and Queues)
Group data	Group/expand/collapse views
Modify Priority	Temporarily change Queue Priority

Feature	Details
Purge	Clear and recount all tasks on a queue
Map	Toggle Queue Volumes between list and Map view
Map Time to Clear	Heatmap highlights problematic queues (Based on # of days to clear the queue)
Agent Statistics	Select team and view list and graphical summary of historical activity up to 90 days old

Administrator Features

Feature	Details
Queues (Work)	Create/Copy/View/Delete GDS, Manual, Email and API queues
Customer	Assign a customer per queue
Work Type	Create/Copy/View/Delete Work Types
Service Levels	Define service levels per queue (Turnaround Time, Time of day SLA)
Sort Options	Select method of task delivery (Oldest on Q, fare expiration, departure date, ticketing time limit)
Combined Sort	Compare the earliest timestamp from sort options, deliver tasks based on combined sort period
Validating Carrier Sort	Sort by validating carrier (Airline) from a GDS PNR
DK Number Sort	Sort by DK Number (customer) from a GDS PNR
Sync	Select frequency of scans per queue
Tags	Select a Tag per queue for enhanced filtering
CSV Export	Export loaded data to CSV
Work Type Diagnostics	Create/Delete Diagnostics per Work Type (Reasons why tasks are on Queue)
Work Type Resolutions	Create/Delete Resolutions per Work Type (What action was taken)

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Feature	Details
People	Create/Modify/Delete users
Roles	Define roles per user (User, Supervisor or Admin)
Manage Teams/Queues	Enable/Disable if a Supervisor can add/delete teams and queues
Skills (User)Enter skills per user	Team Assignment Assign users to a team as Primary or Secondary
Lock/Unlock User Account	Lock/Unlock User Account
Password Reset	Password Reset
Customer	Create/Delete list of customers
Business Groups	Create/Delete a Business Group
Teams	Create/Delete a Team
User Assignment	Assign/Unassign users to/from teams
Queue Assignment	Assign/Unassign queues to/from teams
Skills (Team)	Enter skills required to work queues within a Team
Users for Business Group	View users that belong to the selected Business Group
Breaks	Create/Delete Break Reasons (e.g. Lunch, Meeting, Training)
Dynamic Fields	Create/Delete a dynamic field and values for selection by users (to record extra data about a task)
Scheduling	Create/Modify/Delete Schedules per Team. Deliver tasks on certain days/times

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SAP Cloud Analytics

SAP Cloud Analytics is a cloud-based solution leveraging the power of SAP Hana to provide real-time SaaS business intelligence.

- Cloud-based authoring. No need to install new software on your desktop.
- Create clear and insightful data visualizations and story-telling.
- Visual navigation to filter and drill into your data, focus on data you are interested in and find quick answers to business questions.
- Get answers in a couple of minutes and a few mouse clicks, and quickly respond to new business challenges and opportunities.
- Collaborate with other business users in real time, and easily share your findings with customers, suppliers, and partners.
- Self Service BI capabilities, ad hoc reporting, what-if analysis and more.
- Built-in social collaboration tools. Discuss and share insights in context, speed time to action.

TMC's using Task Manager are achieving at least a 10% increase in productive utilization (total time minus meetings, breaks and training), and reduced average handle times as agents are continually served tasks throughout their working day.

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