

Travel: Approvals, Rules, and Classes/Policies

Travel Service Guide

Includes

- ◆ *Professional Travel*: travel classes, class features (edit classes), approvals, rules, policy violation reasons, Vendor Exclusions
- ◆ *Standard Travel*: travel policies, travel features, approvals, rules, policy violation codes

Last Revised: April 29, 2024

Applies to Concur Travel:

- Professional/Premium edition
 - TMC Partners
 - Direct Customers
- Standard edition
 - TMC Partners
 - Direct Customers

Contents

- Approvals, Rules, and Classes/Policies 1**
- Section 1: IMPORTANT – About this Guide 1**
- Section 2: Overview..... 1**
 - Lowest Logical Fare 2
 - Dual Fare Display 2
 - Important – Approval..... 2
- Section 3: Professional and Standard Travel 3**
 - Terminology Differences 3
- Section 4: Travel Class/Policy 3**
 - Travel Rules, Rule Actions, and Policy Icons 3
 - Travel Rules 3
 - Rule Actions 4
 - Policy Icons..... 5
 - Travel Class/Policy Selection by Admins 10
 - Professional Travel..... 10
 - Standard Travel..... 11
 - Travel Class/Policy Selection by Users 11
 - Professional Travel..... 11
 - Standard Travel..... 12
 - Violation Reasons/Multiple Violation Reasons 12
 - Benefits and Considerations 12
 - Professional Travel..... 13
 - Standard Travel..... 14
 - Information Available to Concur Travel Users 15
 - Concur Travel Integrated with Concur Request..... 15
- Section 5: Approvals – Features 16**
 - Active and Passive Approval..... 16
 - Definition..... 16
 - Approval Deadline Calculation 16
 - Same-Day Travel..... 19
 - When Approval is NOT Supported 19
 - Approval Workflow Options..... 20
 - Professional Travel..... 20
 - Standard Travel..... 21
 - Email 21
 - Approval via Email – Professional Travel Only 22
 - Travel Vacation Reassignment..... 23
 - Approval Queue Management – Professional Travel Only 23
 - Queues 24

Auto-Cancel.....	24
Professional Travel.....	24
Standard Travel.....	24
PNR Finishing.....	25
Section 6: Approvals – What the User Sees	25
Typical Approval Scenario.....	25
Instant Purchase Scenario	30
Section 7: Approvals – What the Approver Sees	31
Typical Approval Scenario.....	31
Instant Purchase Scenario	33
Section 8: Approvals – Changes.....	34
Changes Before Approval/Rejection	34
Changes After Rejection	34
Changes After Approval.....	36
Section 9: Approvals – Offline (Agent Booked).....	36
Overview.....	36
Queues	37
Finishing	38
General Remarks.....	38
Known Limitations	39
Concur Travel Integrated with Concur Request.....	40
Section 10: Approvals – TripLink.....	40
Section 11: Approvals – Reports	40
Section 12: Rules – General Information, Categories, Rule Action Hierarchy, Best Practices, and Tips	40
Pre-Defined and Custom Rules	40
Rule Categories.....	40
Rule Action Hierarchy.....	41
Enforcement Order	41
Run Order.....	42
Best Practice: Tips for Creating and Activating Rules.....	42
Section 13: Configuration – Professional Travel.....	45
Overview.....	45
This Section	45
Lowest Logical Fare (LLF)	45
Access Travel Policy Administration.....	46
Travel Class.....	47
Create a New Travel Class	47
Clone an Entire Travel Class.....	49

Delete an Entire Travel Class.....	50
Class Features	52
Enable Class Features	52
Approval Workflow	55
Define the Approval Workflow	55
Rules	56
IMPORTANT!	56
Modify and Enable Existing Rules	56
Clone (Replace or Copy) Travel Rules Across Rule Classes	58
Use Travel Rule Builder	62
Use Track Changes	66
Policy Violation Reasons	67
Add a New Policy Violation Reason	67
Edit Policy Violation Reasons	68
Deactivate or Activate a Policy Violation Reason	68
Create a Custom Violation Reasons Type	69
Section 14: Configuration – Standard Travel.....	70
Overview	70
This Section	70
Benchmark Lowest Airfare	70
Policy.....	70
Edit a Travel Policy Name	70
Create a New Policy	71
Delete a Policy	72
Travel Features	74
Enable Travel Features	74
Approvals	75
Assign an Approver/Manager.....	75
Rules	76
IMPORTANT!	76
Enable and Modify Existing Rules	76
Define Custom Rules.....	78
Violation Reasons	82
Add a New Policy Violation Reason Manually.....	83
Edit Policy Violation Reasons Manually.....	84
Deactivate or Activate Policy Violation Reasons Manually	86
Add, Edit, and Deactivate Policy Violation Reasons Via Import	88
Section 15: Appendix A – Concur Travel Integrated with Concur Request	90
Overview.....	90
Rule Actions.....	90
Background.....	91
Rule Actions.....	92
PNR Finishing.....	93
Force Finishing before Approval	93
Policy Compliant Remarks.....	93

Offline (Agent-Booked) Approvals.....	93
Concur Travel Integrated with Concur Request: Workflow Diagrams	94
Offline	94
Online	95
New Concur Travel Experience: Book Then Approve Support (Professional Edition).....	97
Limitations.....	98
Configuration	98
Section 16: Appendix B – Vendor Exclusions (Professional Travel Only).....	98
Professional and Standard Travel.....	98
Best Practice.....	99
IMPORTANT	99
Configuration	99
Exclude a Travel Vendor	99
Section 17: Appendix C – Glossary	101

Revision History

Date	Revision Notes/Comments
April 29, 2024	Added a note to <i>Approval Queue Management – Professional Travel Only</i> section. Updated <i>Changes Before Approval/Rejection</i> section.
April 19, 2024	Updated <i>Travel Class/Policy Selection by Users</i> with Renfe Rail information. Removed yellow highlight throughout.
April 3, 2024	Updated <i>Appendix A – Concur Travel Integrated with Concur Request</i> section
February 21, 2024	Updated <i>Rule Actions</i> topic in the <i>Travel/Class Policy</i> section
July 24, 2023	Added note to Overview section about SAP Fiori UI themes. Updated references to “yellow” caution symbol.
April 26, 2023	Finalized information on new car experience
January 30, 2023	Updated draft to include content for the new Car experience.
January 14, 2022	Updated the copyright year; no other changes; cover date not updated
April 7, 2021	Added note under the <i>Typical Approval Scenario</i> topic in the <i>Approvals – What the User Sees</i> section
January 12, 2021	Removed reference to deprecated Travel Service Guide in <i>Configuration – Professional Travel</i> section
November 2, 2020	Updated <i>Approval Deadline Calculation</i> topic within the <i>Approvals – Features</i> section
March 23, 2020	Added note to <i>Approval via Email – Professional Travel Only</i> Added best practice to <i>Changes Before Approval/Rejection</i> Added appendix – <i>Glossary</i> Added note to <i>Same Day Travel</i> Added text to <i>Best Practice: Tips for Creating and Activating Rules</i>
March 05, 2020	Corrected TSG setting name “Allow Immediate Cancel of non-air/rail trips that are rejected”
January 15, 2020	Added information about Approval via Email feature Updated copyright to 2004 - 2020
June 20, 2019	Removed "Concur" from the cover; no other changes; cover date not updated
June 12, 2019	Updated description for Approval hold queue
May 21, 2019	Added information about Dual Fare Display under the Overview section
March 10, 2019	Updated the copyright; no other changes; cover date not updated
January 29, 2019	Added more information about <i>Allow/Display Message</i>
December 18, 2018	Updated the screen shot the Edit Classes (Professional) and Travel Features tab (Standard)
December 14, 2018	Clarified the information in the Changes After Rejection section
December 11, 2018	Removed Hand Baggage Only Fares setting

Date	Revision Notes/Comments
December 3, 2018	Added a note about limiting the number of declined options that appear if a user selects an out-of-policy rate
October 17, 2018	Added a note that approval – either passive or required – are not supported with alternate GDS bookings
July 30, 2018	Added information about custom violation reason types
July 1, 2018	Added: <ul style="list-style-type: none"> • More definition around the rule actions use when Travel is integrated with Request • More definition in the <i>Force Finishing before Approval</i> section
May 14, 2018	Added: <ul style="list-style-type: none"> • A note about emails • Information about the British Airways Hand Baggage Only setting
April 2, 2018	Added more information about Train compliance
December 22, 2017	Complete revision; added several new sections

Approvals, Rules, and Classes/Policies

Section 1: IMPORTANT – About this Guide

Be aware of the following:

- **Infinite variables:** Certain scenarios have an infinite number of variables or extremely unusual circumstances, like rare cancellation or refund situations. So, not all scenarios can be presented in this guide. Also, certain processes may be influenced by third- or fourth-party providers. In some cases, you must contact the provider directly.
- **User interface, fees, rates, schedules:** When other providers change their user interface (for example, web site) or their fees/rates/schedules, they are under no obligation to make SAP Concur aware of those changes. If a screen sample in this guide is outdated because of a change made by a provider, we will update that screen sample when we become aware of the change and at our earliest convenience.
- **Permissions:** A company's admin may or may not have the correct permissions to manage the feature described in this guide. If an admin needs to manage this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the admin should be aware that some of the tasks described in this guide cannot be completed by the company. In this case, the client must contact their TMC (if a TMC provides their support) or SAP Concur (if SAP Concur provides their support).

Section 2: Overview

This guide contains information that describes the new Concur Travel experience for Car, Hotel, and Air. This information will be displayed in notes or indicated with "new experience" as these features are released.

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

This document describes the ways in which Concur Travel can assist a company in enforcing its travel policy. It includes information about:

- Travel classes/policies, which are the "containers" for the travel rules and other travel class features
- Pre-trip approval options in Concur Travel
- Company travel rules:
 - ◆ How to create and manage
 - ◆ How they are used to enforce compliance

- ◆ How enforcement issues are communicated to users

Lowest Logical Fare

Lowest Logical Fare (LLF) is part of the travel class and is closely associated with rules. It is mentioned in this guide but is **not covered in detail**.



For complete details, refer to the *Lowest Logical Fare (LLF) / Benchmark Lowest Airfare Travel Service Guide*.

Dual Fare Display

All fares displayed in Dual Fare Display are subject to approvals, rules, and policies individually.

The screenshot displays a flight selection interface. A warning popup is overlaid on the Delta flight options, stating: "Warning: This option triggers one or more major company travel rules. You must get approval before taking this trip. Air Fare is greater than \$310". The Delta section shows two flight options: 08:10 AM MM and 12:00 AM WW. The fare options for Delta are Basic Economy at \$15,987 and Main Cabin at \$17,987, both with "Select" buttons and warning icons. The Alaska Airlines section shows two flight options: 09:40 AM SAN → 11:20 AM SFO (Nonstop, 1h 40m) and 03:10 PM SFO → 04:50 PM SAN (Nonstop, 1h 40m). The fare options for Alaska are Main at \$223.61 (with a "Select" button) and Refundable Main at \$528.00 (with a "Not Allowed" status and a red exclamation mark icon). A "More fares/details" link is visible at the bottom of the Alaska Airlines section.



For more detailed information on Dual Fare Display, refer to the *Dual Fare Display (Sabre Only) Travel Service Guide*.

Important – Approval

Be aware that approval – either passive or required – is not supported with alternate GDS bookings.




For information about alternate GDS, refer to the *Alternate GDS Bookings Travel Service Guide*.

Section 3: Professional and Standard Travel

This guide discusses both Professional and Standard Travel. In those cases where a feature applies to one but not the other, that difference is noted.

Terminology Differences

Though the features discussed in this guide are generally the same for Professional and Standard Travel, the terminology may differ.

Edition		Definition / Description
Professional	Standard	
Travel class (also known as <i>rule class</i> or <i>travel rule class</i>)	Travel policy	"Container" for the various travel rules and travel features that are used to enforce the company's T&E policies and guidelines Every Travel user is assigned to a <i>travel class/policy</i> .
Class features	Travel features	General features associated with each class/policy, such as allowing users to book ground transportation (limos) or user-supplied hotels
Lowest Logical Fare (LLF)	Benchmark Lowest Airfare	Client-defined parameters that Travel uses to determine the lowest airfare within those parameters <i>LLF/Benchmark is mentioned but is not covered in detail in this guide.</i>  Refer to the <i>Lowest Logical Fare (LLF) / Benchmark Lowest Airfare Travel Service Guide</i> .

Section 4: Travel Class/Policy

A company can have more than one travel class/policy, which allows the company to provide different travel-related options to different sets of employees. For example, the company may have a travel class/policy specifically for executives, a different one for sales staff, and yet another for everyone else in the company.

Travel Rules, Rule Actions, and Policy Icons

Travel Rules

Concur Travel provides many default rules, for example, to define the maximum allowable cost of a rental car, the highest allowable class of service (First class, Business class, etc.), the required use of preferred vendors, etc. Customers can customize and activate any of these rules. In addition, customers can create custom rules using Travel Rule Builder.





For information about creating and managing rules, refer to the configuration information in this guide.

Rule Actions

When defining a travel rule, the admin defines the **rule action** taken if the rule is broken. The rule actions described below apply to most – but not all – rules:

For the new Concur Travel experience, only the following rule actions are supported:

- Display Message
- Notify Manager
- Log for Reports
- Hide Results and Allow
- The option **Show, but do Not Allow** operates as Hide.

Rule Action	General definition (more detail on the following pages)
Require Approval	The user can book this segment and tickets will be issued if the user's manager/approver approves the entire trip before the ticketing deadline.
Require Passive Approval (Standard Travel = Passive Approval)	The user can book this segment and tickets will be issued if the user's manager/approver does not reject it before the ticketing deadline.
Notify Manager	The user can book this segment with no restrictions. In addition, a notification email is sent to the user's manager/approver.
Log for Reports	The user can book this segment with no restrictions. In addition, the booking information is saved for reporting purposes.
Show, but Do Not Allow	The search result appears to the user, but it cannot be selected. This way, the user knows the search returned all possible options, but the result is out-of-policy and cannot be chosen. Admins can use messaging to educate the traveler about why the desired option is out-of-policy. NOTE: Concur Travel recommends using this rule action instead of <i>Hide Results</i> (defined below).
Hide Results	These out-of-policy results do not appear to the user in the search results. NOTES: <ul style="list-style-type: none"> • When using this rule action with hotels, the hotel property is not hidden from results; only the rates are hidden. The user will see a message that indicates that no rates are available.  For more information, refer to the <i>Best Practice: Tips for Creating and Activating Rules</i> section of this guide. • For customers using the travel configuration setting to Enforce LLF based on User's Chosen Flight, this rule action should not be used with Lowest Logical Fare (LLF) rules.  For information about Lowest Logical Fare, refer to the <i>Lowest Logical Fare / Benchmark Lowest Airfare Travel Service Guide</i>.

Rule Action	General definition (more detail on the following pages)
Allow/Display Message	The user can book this segment with no restrictions. In addition, a message is displayed to the user.

TRAVEL INTEGRATED WITH REQUEST

Two additional rule actions are specific for Travel integrated with Concur Request.

⚠ IMPORTANT: Do not use these two options before reading the *Travel Integrated with Request* appendix in this guide.

Rule Action	General definition
Require Pre-approval & Log	This option is used when Request is integrated with Travel.
Require Pre-approval & Notify	This option is used when Request is integrated with Travel.

Policy Icons

During the booking process, a **policy icon** appears to the left of the blue (price) selection button – as applicable – on the search results pages.

- **In Policy:** If the search result provides only one fare/rate, then there is no icon if it is in policy.


If there are multiple fares/rates, then the green check mark icon is used in the expanded view to indicate the rate is within policy.

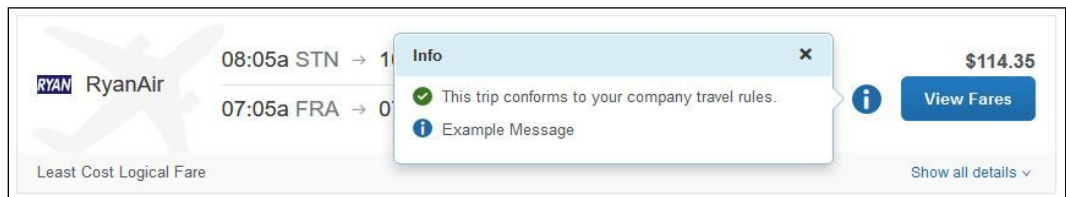
If the user selects this option, no further action is required; the user completes the booking as usual.


- **Rule Action – Allow / Display Message:** The blue information  icon indicates that the option is in policy but with additional information.






RYAN RyanAir 08:05a STN → 10:40a FRA Nonstop 1h 35m \$114.35
 07:05a FRA → 07:40a STN Nonstop 1h 35m  [View Fares](#)
 Least Cost Logical Fare [Show all details](#) v

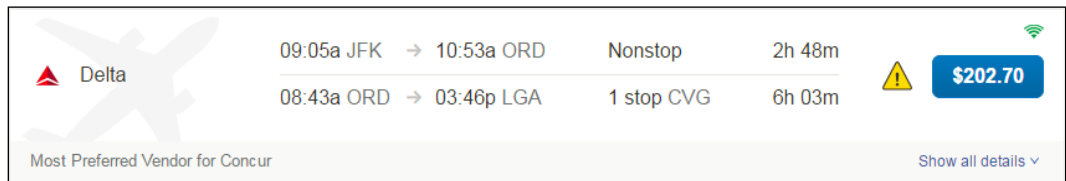
The text message with the information displays if the user clicks the icon. There is an additional green check mark  icon displayed together with a default text message to clearly indicate that the option is in policy:




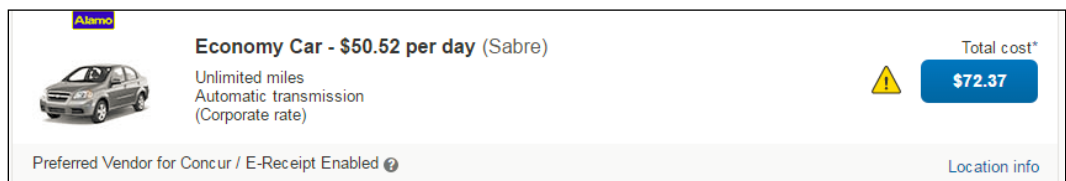
RYAN RyanAir 08:05a STN → 10:40a FRA Nonstop 1h 35m \$114.35
 07:05a FRA → 07:40a STN Nonstop 1h 35m  [View Fares](#)
 Least Cost Logical Fare [Show all details](#) v


Info x
 This trip conforms to your company travel rules.
 Example Message

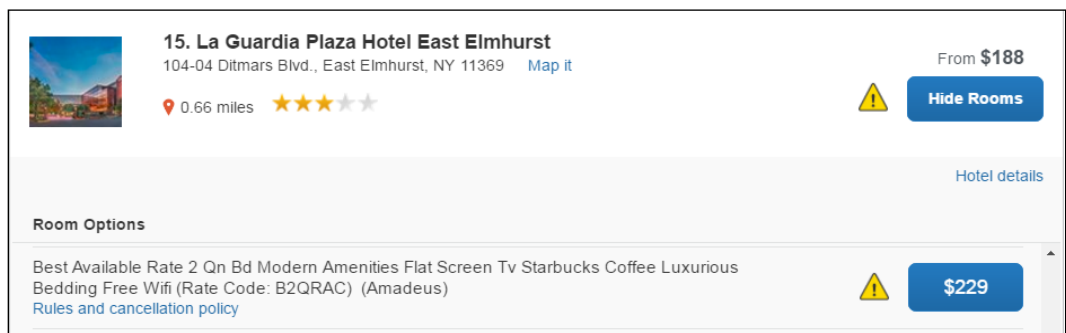
- **Rule Actions – Log for Reports and Notify Manager:** The yellow (orange with Fiori theme) caution  icon indicates a rule violation, meaning that the selected option (flight, car, etc.) is not within policy.




Delta 09:05a JFK → 10:53a ORD Nonstop 2h 48m \$202.70
 08:43a ORD → 03:46p LGA 1 stop CVG 6h 03m 
 Most Preferred Vendor for Concur [Show all details](#) v




Alamo **Economy Car - \$50.52 per day (Sabre)** Total cost*
 Unlimited miles Automatic transmission (Corporate rate) \$72.37 
 Preferred Vendor for Concur / E-Receipt Enabled  [Location info](#)



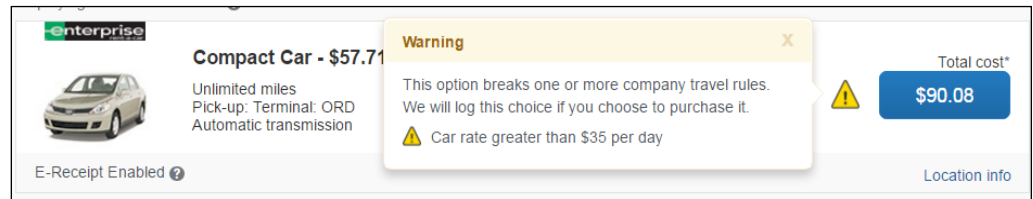
15. La Guardia Plaza Hotel East Elmhurst From \$188
 104-04 Ditmars Blvd., East Elmhurst, NY 11369 [Map it](#)  [Hide Rooms](#)
 0.66 miles ★★★★★ [Hotel details](#)

Room Options

Best Available Rate 2 Qn Bd Modern Amenities Flat Screen Tv Starbucks Coffee Luxurious Bedding Free Wifi (Rate Code: B2QRAC) (Amadeus) \$229 
[Rules and cancellation policy](#)

For these options:

- ◆ The violated rule, similar to the one below, displays if the user clicks or hovers over the icon.



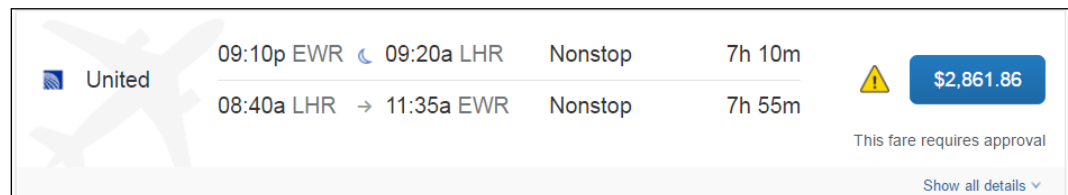
The screenshot shows a car rental card for Enterprise. The card displays "Compact Car - \$57.71" with details: "Unlimited miles", "Pick-up: Terminal: ORD", and "Automatic transmission". A yellow warning popup is overlaid on the card, stating: "Warning: This option breaks one or more company travel rules. We will log this choice if you choose to purchase it." Below the warning, it says "Car rate greater than \$35 per day". To the right of the card, a blue button shows the "Total cost*" as "\$90.08". There is also a "Location info" link at the bottom right.

- ◆ If the user actually selects this out-of-policy option:
 - The rule information also appears in the policy violation popup.
 - The user must provide a reason for selecting this out-of-policy option.
- ◆ The user completes the booking; the booking is sent to the agency as usual for ticketing.
- ◆ The admin had configured the rule with either the *Notify Manager* or *Log for Reports* rule action. So:
 - For the *Notify Manager* rule action, Concur Travel sends an email to the user's manager/approver but no action is required.
 - For the *Log for Reports* rule action, the information is saved for reporting.



Either way, the email and reporting information include the reason stated by the user for selecting this out-of-policy option, as well as the lower-priced options the user could have selected.

NOTE: The customer can use the **Limit options turned down for Approval** module property to limit the number of declined options that appear in the approval email, reports, and the **Travel Policy Violation** window. Refer to the *Concur Travel: Module Properties User Guide* for more information.

- **Rule Actions – Require Approval / Passive Approval:** Similar to above, the yellow (orange with Fiori theme) caution icon indicates a violation of a rule and the additional text (such as "This fare requires approval") alerts the user that approval is needed. The selected option (flight, car, etc.) is out-of-policy and the **entire** trip requires approval by the user's manager/approver.



The screenshot shows a flight option for United. It displays two flight segments: "09:10p EWR → 09:20a LHR" (Nonstop, 7h 10m) and "08:40a LHR → 11:35a EWR" (Nonstop, 7h 55m). A yellow warning icon is present, and a blue button shows the total cost as "\$2,861.86". Below the button, it says "This fare requires approval". There is also a "Show all details" link at the bottom right.

Intermediate Car - \$75.55 per day (Apollo)

Unlimited miles
Pick-up: Terminal: SEA
Automatic transmission


Total cost*

\$104.96

This rate requires approval

E-Receipt Enabled

Location info



3. Hilton London Green Park

Half Moon Street, London, England W1J 7BN [Map it](#)

0.77 miles ★★★★★

From **\$262**

Hide Rooms

All rates require approval

Most Preferred Vendor for ACME

Hotel details

Room Options

Best Available Rate Single Hilton Guest Room Single Bedded Room For 1 Adult (Rate Code: A05LV6) (Amadeus)

[Rules and cancellation policy](#)

\$262

This rate requires approval

For these options:

- ◆ The violated rule displays if the user clicks or hovers over the icon.
- ◆ If the user actually selects this out-of-policy option:
 - The rule information also appears in the policy violation popup.
 - The user must provide a reason for selecting this out-of-policy option.
- ◆ The user can complete the booking; however, the entire trip must be **approved** before it is sent to the agency for ticketing – or in the case of *Require Passive Approval*, must be **rejected** prior to the approval deadline to avoid the trip being sent to the agency for ticketing.
- ◆ Concur Travel sends an email to the manager/approver, encouraging prompt action. The email includes the reason stated by the user for selecting the out-of-policy option, as well as the lower-priced options the user could have selected.

NOTE: The customer can use the **Limit options turned down for Approval** module property to limit the number of declined options that appear in the approval email, reports, and the **Travel Policy Violation** window. Refer to the *Concur Travel: Module Properties User Guide* for more information.

- ◆ Once the manager/approver approves the trip – or in the case of *Require Passive Approval*, when the approval deadline is met – it will be sent to the agency for ticketing.

- **Rule Action – Show, but Do Not Allow:** The red exclamation ! icon indicates an option has been restricted from the user, meaning that this option (flight, car, etc.) is not allowed and, therefore, cannot be selected.

For these options:

- ◆ The violated rule, similar to the one below, displays if the user clicks or hovers over the icon.

- ◆ The user can view details, room information, etc. but cannot select the option.

- **Rule Action – Hide Results:** Additional rules can be set that hide out-of-policy fares by using the *Hide Results* rule action.

⚠ IMPORTANT: Concur Travel discourages the use of this rule action because it can cause confusion, especially if the user is expecting to see a particular result. Instead, Concur Travel recommends using the *Show, but Do Not Allow* rule action as it allows the user to see the result, but restricts the user from selecting it. The admin can also add messaging to further explain why this option has been restricted.

Travel Class/Policy Selection by Admins

If a company has more than one travel class/policy, then there is likely a need to "move" a user from one travel class/policy to another.

Professional Travel

The admin follows the normal steps to locate the desired user in User Administration.

In the **Travel Settings** section, the admin makes the desired change in the **Rule Class** field in section.

Travel Settings

User Group Membership

Budget Owners
 Travel Administrators

Reset

Rule Class
Default Travel Class (CommaSavvy) ▼

Employee Position/Title

Manager Name
Hamilton, Erik **Edit** **None**

Org. Unit/Division ▼ **PAR/Level 2 STAR** _____ **XML Profile Sync ID** _____ **Exchange Login** _____ ?

Standard Travel

The admin follows the normal steps to locate the desired user using the **Manage Users** setup step.

The admin makes the desired change in the **Travel Policy** field in section.

The screenshot shows the 'User Detail for: StandardSept22' form. The 'Travel Policy' dropdown menu is highlighted with a red circle, showing 'Travel Policy (US) Normal' selected. Other fields include Login ID, Email Address, Password, Retype Password, Name (Title, Suffix, First Name, Last Name, Middle Name), GDS Profile Name, XML Profile Sync ID, Employee ID, Account Activation Date, Account Termination Date, and Permissions (Guest booking, Report user, Admin Permission).

Travel Class/Policy Selection by Users

For the new Car experience, the option to allow the user to select a travel class at the beginning of the reservation process is not supported.

Professional Travel

Users cannot change their own travel classes in Profile. The admin can, however, configure Professional Travel to allow the user to select a travel class at the beginning of the reservation process. In Travel System Admin, the admin chooses the appropriate option in the **Rule Class Selection** list on the travel configuration page.

This feature is often used for customers who implement policy based on the department that incurred the travel expense. Some examples are:

- Travelling on behalf of a different department (HR, Marketing, Sales, etc.)
- Billable versus non-billable travel

In the new Concur Travel experience for Renfe Rail, administrators can allow users to select a rule class tied to the same configuration or agency.

For Renfe, all three options under the **Rule Class Selection** dropdown will be supported.

These are:

- User cannot select rule class, User can select from rule classes tied to this configuration
- User can select from rule classes tied to this agency
- User cannot select rule class



For configuration information about this setting, refer to the *Wizard Options – Rule Class Options* section of the *Travel System Admin User Guide*.

Standard Travel

Standard users cannot change their travel classes in Profile. In addition, in Standard Travel, users are assigned to only one travel policy and cannot select a different policy during booking.

Violation Reasons/Multiple Violation Reasons

Benefits and Considerations

As mentioned previously, a user may need to violate a travel rule while booking a trip. For example, perhaps the preferred vendor has no inventory available, so a non-preferred vendor must be used. If so, the user explains the action by choosing from a list of client-defined policy violation reasons, for example, so the user's approver better understands the situation.

Violation reasons are often used to provide evaluable data on policy violations to the travel agency for reporting. Your travel agency can assist with information on which violation reason codes they support. Violation reasons can also be evaluated in the Concur Travel reporting in the Travel Policy Exceptions report.

Violation reasons are grouped by types. Types generally represent a booking workflow (for example, air, hotel, car). Violation reasons with the *General* type are displayed over all workflows and for travel policy rules on the itinerary level. Violation reasons with the *Itinerary* type are displayed only for travel policy rules on the itinerary level if assigned to the rule(s).

The only rules for which the policy violation popup window is not displayed, and no violation reason needs to be selected by the user if violated are rules containing the *All trips* rule part. This logic supports use cases in which actions should be triggered for all trips (for example, require approval, notify manager), independent of any policy violations.

When the admin sets up a violation reason in Concur Travel, the admin must assign a code. To support unambiguous evaluation, codes must be unique across all violation reason types.

Concur Travel supports violation reasons with a maximum length of 120 characters. Setup of the same violation reason in multiple languages on the same Travel configuration is currently not supported.

Professional Travel

By default, the user must provide only one reason code – even if the user violates multiple rules. The admin can, however, configure Professional Travel to request multiple reasons if multiple rules of the same booking workflow (flight, hotel, car) are violated. To do so, the admin will activate the option **Allow Multiple Violation Reason Codes** on the travel configuration page, set up one or several custom violation reason types, and then assign the different types to different rules.

With this setup option, if a user violates one or more rules, the user sees one list of violation reasons per reason code type.

- If the user breaks one rule, the user sees one list.
- If the user breaks two rules and the rules have the same violation reason code type, the user sees one list.
- If the user breaks multiple rules with different violation reason code types, the user sees a list for each violation reason code type and must choose a value for each one.

Users see only one text box for comments, despite the number of rules violated.

Example:

- The admin sets up a rule in the **Flight** rule group:
 - ◆ Air Fare is greater than €1000 - Require Approval.
 - ◆ Violation reason type is Air.
- The admin sets up a rule in the **Flight – Class of Service** rule group:
 - ◆ Cabin classes allowed: First class - Notify Manager.
 - ◆ Violation reason type is custom (for example, with name *1st class – custom*)

The user books a flight with a fare higher 1000 € in first class. This breaks two rules with different violation reason types, so the user sees two lists and must chose a value for each one.

Travel Policy Violation ✕

⚠ This flight is not in compliance with the following travel rule(s):

⚠ Air Fare is greater than €1000
 Please choose the reason for selecting this travel option. If more than one reason applies, choose the most applicable. This reason applies to this entire trip.

⚠ Cabin classes allowed: First class
 Please choose the reason for selecting this travel option. If more than one reason applies, choose the most applicable. This reason applies to this entire trip.

Please explain why you have chosen this flight. NOTE: We will log flights which you did not take.

Chosen:

Cost: £1928.30							
Outbound Flight							
UNITED	8321	Toronto	09/18/2018	Los	09/18/2018	Boeing	
		Pearson Intl	8:00 AM	Angeles	10:11 AM	787	

For more information about the **Allow Multiple Violation Reason Codes** setting, refer to the *Wizard Options – General Options* section of the *Travel System Admin User Guide*.

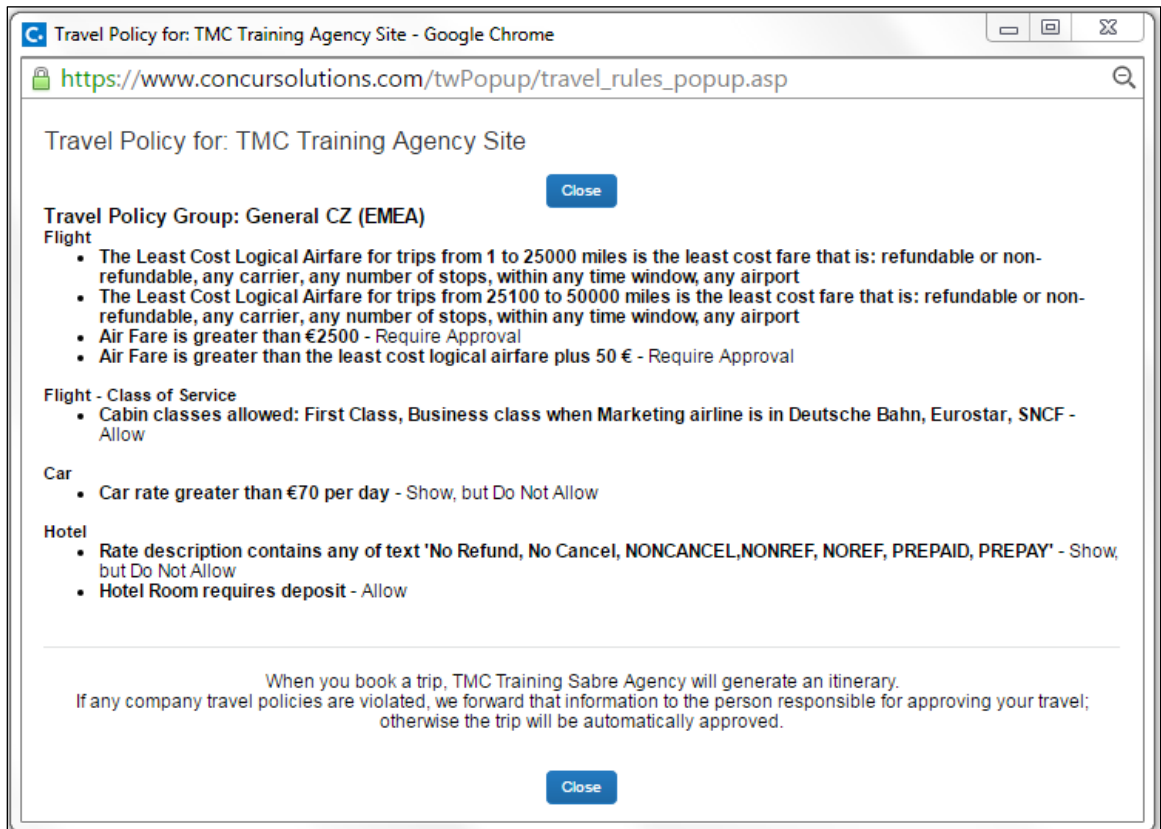
For configuration information about how to set up custom violation reason types and assign them to rules, refer to the *Configuration – Professional Travel* section of this guide.

Standard Travel

In Standard Travel, the ability for users to provide multiple reasons is not available.

Information Available to Concur Travel Users

Concur Travel provides a link to the user's travel class/policy in the footer of the SAP Concur home page and on most other Travel pages. This link provides a list of rules (and the associated rule action) that have been enabled for the user's travel class/policy.



Concur Travel Integrated with Concur Request

If Concur Travel is integrated with Concur Request and if approval is required, be aware that **all** approval occurs in Concur Request – not Concur Travel. Concur Travel recommends that customers work with their TMC partner, SAP Concur implementation specialist, or SAP Concur support to ensure that the integration meets the company's needs when Concur Request and Travel are both in use.



For complete details, refer to the *Travel Integrated with Concur Request* appendix in this guide.

Section 5: Approvals – Features

Active and Passive Approval

Definition

As described previously, when a rule is assigned the *Require Approval* rule action, the trip requires **active approval**. That is, if the approver does not approve the trip before the approval deadline passes, then the trip is not sent to the agency for ticketing.

When a rule is assigned the *Require Passive Approval* rule action, the trip requires **active rejection**. That is, if the approver does not reject the trip before the approval deadline passes, then the trip is automatically approved and sent to the agency for ticketing.

Note the following for passive approval:

- The approver may approve the trip at any time prior to auto-approval to expedite ticketing.
- If there are multiple levels of approval, they will all be bypassed.
- There are no additional remarks added to the PNR for passive approval.


Approval Deadline Calculation

An **approval deadline** is used to ensure trips are approved in time for the segments to remain valid. For all trips, Concur Travel assigns an approval deadline, which is calculated using several different factors.

AIR

When a trip is placed on approval hold, Concur Travel calculates a time that is in advance of the **last ticketing date** for an air reservation. The air segments for a trip will be canceled by the airline or Concur Travel's auto-cancel system (if configured) if the booking has not been ticketed by the **last ticketing date**.

Calculation:

- Concur Travel starts with the **ticketing deadline** provided by the vendor, for example, 11:59 PM today.
 - ◆ For GDS fares, the ticketing deadline date is returned in the stored fare or via a flight firming SSR in the PNR.
 -  For complete details, refer to the *Flight Firming Travel Service Guide*.
 - ◆ For non-instant purchase direct connect vendors, the ticketing deadline date is returned through the API.

- ◆ For instant purchase direct connect vendors, approval is not supported.

NOTE: Southwest Direct Connect is **not** considered an instant purchase direct connect vendor.

- Concur Travel then checks the agency configuration ticketing deadline.

Booking PCC/SID/OfficeID 13H1	Profile PCC/SID/OfficeID 13H1	ARC/IATA Agency Number (booking source) 	Ticketing Time Deadline ? 07:00 pm
PCC Time Zone (UTC-05:00) Eastern Time (US & Canada)			
Ticketing PCC (Sabre and Apollo only: leave blank if same as booking PCC above.)		Ticketing City Code (required for ticket change)	

- Concur Travel also checks one of two travel configuration settings:

- ◆ For Professional Travel:

- For active approval, **Allow users to put trips on hold for X days**
- For passive approval, **Auto-approve trips on passive hold after a maximum of X days**



For configuration information about these settings, refer to the *Wizard Options – General Options* section of the *Travel System Admin User Guide*.

- ◆ For Standard Travel:

- The **Auto-approve trips on passive hold after a maximum of X days** is ON and set to one day. This setting is not available for change.
- The **Allow users to put trips on hold** field and the **Number of days to hold trip** field are available on the **Agency Settings** step.



For configuration information about these settings, refer to the *Travel Setup Guide For Concur Standard*.

- Concur Travel compares the three and uses whichever is **earlier** to set the **ticketing deadline** in our systems. For example, the ticketing deadline from the GDS is 11:59 PM today. The travel configuration setting is set to one day and the agency configuration is set to 11:55 PM. In this scenario, Concur Travel would use the agency configuration time of 11:55 PM because it is the earliest of the three.
- For active approval, Concur Travel then subtracts two hours, to 9:55 PM, which becomes the **approval deadline**. This two-hour window allows time for Concur Travel's processes to move the reservation into the fulfillment agency's ticketing queue before the ticketing deadline passes.

- For Passive Approval, Concur Travel does not subtract two hours from the approval deadline. If **Auto-approve trips on passive hold after a maximum x days is enabled**, “after x days” becomes the approval deadline without subtracting two hours. This may also be the ticketing deadline.

NOTE: The **approval deadline** – or what appears to the approver as the time they need to approve the trip – does not change the **ticketing deadline**. The approver is told they need to approve by X date/time, based on the logic noted above. However, the ticket is not auto-cancelled until the true ticketing deadline has passed.

Example: The **ticketing deadline** for a trip is 11:55 PM tonight. The **approval deadline** noted in the approver notification is 9:55 PM tonight. The auto-cancel does not go into effect until 11:55 PM. The approver notification is just to encourage the approver to approve in a timely manner to ensure the ticket is issued in time.

ALL TRAVEL TYPES EXCEPT AIR

When a non-air trip is placed on approval hold, Concur Travel calculates a time that is in advance of the **trip start date**.

Calculation:

- Concur Travel starts with the pick-up/check-in time for the first segment of the trip.
- Concur Travel also checks one of two travel configuration settings:
 - ◆ For Professional Travel:
 - For active approval, **Allow users to put trips on hold for X days**
 - For passive approval, **Auto-approve trips on passive hold after a maximum of X days**



For configuration information about these settings, refer to the *Wizard Options – General Options* section of the *Travel System Admin User Guide*.

- ◆ For Standard Travel:
 - The **Auto-approve trips on passive hold after a maximum of X days** is ON and set to one day. This setting is not available for change.
 - The **Allow users to put trips on hold** field and the **Number of days to hold trip** field are available on the **Agency Settings** step.



For configuration information about these settings, refer to the *Travel Setup Guide For Concur Standard*.

- Concur Travel then subtracts two hours, to determine the **approval deadline**. This two-hour window allows time for Concur Travel's processes to move the reservation into the fulfillment agency's ticketing queue before the ticketing deadline passes.

NOTE: We do not consider hotel cancellation policies for the approval deadline.

Same-Day Travel

If a user submits a trip within 24 hours of departure (or the pick-up/check-in time for non-air itineraries) and **active** approval is required, the system will process the booking as if the approval deadline is within 30 minutes to an hour of when the booking was submitted. This means the trip will likely be auto-cancelled (if enabled) prior to the approver having time to approve or reject the trip.

NOTE: For this reason, Concur Travel recommends customers with an active approval policy provide a user message (via configurable messaging/travel policy) or prevent users from submitting same-day travel reservations. An alternative would be to consider passive approval to avoid this scenario.

If a user submits a trip within 24 hours of departure (or the pick-up/check-in time for non-air itineraries) and **passive** approval is required, the system will process the booking as if the approval deadline is within 30 minutes to an hour as well. This means the trip will be queued to ticketing almost immediately.

NOTE: Due to the time needed for ticket issuance, short notice or same day travel bookings are discouraged if they require approval. Reason for this complication is that the approval deadline is either too soon or even in the past. Concur Travel recommends to either exempt such bookings from requiring approval or set up rules like "Flight is booked less than [HoursAdvance] hours in advance" or "Flight is booked less than [DaysAdvance] days in advance" to not allow users to book online on short notice. They can always call the travel agency for such a booking.

When Approval is NOT Supported

Require Passive Approval and *Require Approval* rule actions are not available for all rule categories. For example, they are not available for Ticket Change and Web Air travel rules. For these two categories, the charges are incurred at the time of change/reserve and, therefore, cannot be approved or rejected after the fact.

NOTE: Concur Travel recommends using TripLink to capture trips that occur outside of the supported approval process. For more details on TripLink manager/approver notifications, refer to the *TripLink User Guide*.

Approval Workflow Options

Professional Travel

The admin defines the approval flow in one of the following ways:

- **Route to one approver per travel class:** The client can have all trips that require approval – from all users in a travel class – routed to a single approver.
- **Route to the user's manager:** The client can have all trips that require approval routed to each user's manager. If this option is selected, the affected trip is routed to the manager listed in the user's profile.

Company Information		
Employee ID	Cost Center	Exchange Login ?
1479336	11	
Manager [Required]	Org. Unit/Division	Employee Position/Title
Vernon Bear		Senior program mana
ACCOUNTING UNIT [Required]	Ulysses [Required]	
ACCTG	12	

NOTE: Concur Travel recommends that a company provide an upload or feed to ensure that the manager field is populated for all users if this option is selected. If a manager is not assigned, the trip will not be sent for approval and the fare may be lost.

- **Route to the user's manager and then the manager's manager:** The client can use the two-level approval option.

NOTE: Clients should verify that user permissions are set properly for all managers/approvers. If the user's manager/approver (the first level) has administrative permissions and they approve the trip, it will be sent for ticket fulfillment immediately and will bypass the second manager/approver.

In the configuration (described later in this guide), if 2 is selected, all trips that require approval are routed to each user's manager and then:

- ♦ If the user's manager approves the trip, the trip will then be sent to the manager's manager (as listed in the manager's profile).
- ♦ If the user's manager approves the trip and the manager's manager approves the trip, then it is sent to the agency for ticketing.
- ♦ If the first manager rejects the trip, the trip will not be sent to the second manager. As usual, the user will receive an email advising that the trip was rejected.

- ◆ If the first manager approves the trip and the second manager rejects it, the first manager will not receive email notification of the rejection but the user will.



For configuration information, refer to the *Configuration – Professional Travel* section of this guide.

Standard Travel

The admin defines the approval flow in one of the following ways:

- **Route to one approver per travel policy:** The client can have all trips that require approval – from all users associated with a travel policy – routed to a single approver.
- **Route to the user's manager:** The client can have all trips that require approval routed to each user's manager. If this option is selected, the affected trip is routed to the manager listed in the user's profile.

NOTE: Concur Travel recommends that a company provide an upload or feed to ensure that the manager field is populated for all users if this option is selected. If a manager is not assigned, the trip will not be sent for approval and the fare may be lost.



For configuration information, refer to the *Configuration – Standard Travel* section of this guide.

Email

There are several types of emails used when the *Notify Manager* or *Require Approval/Require Passive Approval* rule actions are used.

- **Rule Action – Notify Manager:** Concur Travel sends an email to the manager as notification only; no action required. No notification is sent to the user. The user is allowed to proceed with booking.
- **Rule Action – Require Approval:** Concur Travel sends an email to the manager and requires them to approve or reject within the approval time window. The user's reservation is placed in approval hold until it has been approved or rejected. Whether approved or rejected, the user is notified.

- **Rule Action – Require Passive Approval:** Concur Travel sends an email to the manager and requires them to reject within the approval time window or it is assumed approved. The user's reservation is placed in approval hold until it has been rejected or the approval time window has passed. Whether approved or rejected, the user is notified.

NOTE: All emails set to **Contact:** Yes in the approver's profile will receive approval request emails. Any of those received emails can be used to approve the trip.



All of the email types discussed in this guide are shown in the *Automated Emails Travel Service Guide*.

Approval via Email – Professional Travel Only

If the company uses Professional Travel and allows email-based approvals, the manager/approver can approve or reject via email, rather than having to log into Professional Travel to process the task within the user interface. For email notifications, Concur Travel uses the language assigned in the approver's profile.

The manager/approver receives the email, clicks **Reply**, and then:

- To approve the trip, the manager/approver puts an [A] in the brackets or types the word *approve*.
- To reject the trip, the manager/approver puts an [R] in the brackets or types the word *reject*.

NOTE: Concur Travel recommends using the **approval/rejection by email** feature exactly as described above. Approve/Reject (or localized equivalents) must be included in the email response in order for this feature to work as expected. It is not recommended to include any extra words.

IMPORTANT – TOKENS

There is a token at the bottom of the email, which is used by Concur Travel to match the manager/approver's response (approve or reject) to the correct user and the correct pending trip. It is imperative that this token is not removed because the system will not be able to read the response and, therefore, the trip will still show as needing approval.

Note the following about tokens:

- This is important for managers/approvers who manage approval via the mobile device. Many mobile devices truncate email messages due to the limited space available on screen. For this reason, managers/approvers should always ensure they download the entire message before replying.
- Be aware that Concur Travel generates the token **only** for new trips. The token does not appear on an email for a resubmitted trip, which means the manager/ approver cannot approve/reject via email. For a resubmitted trip, the manager/approver must sign in to the web version of Concur Travel to approve or reject the trip.



For configuration information, refer to the *Approval Email Options* section of the *Travel System Admin User Guide*.

Travel Vacation Reassignment



Refer to the *Travel Vacation Reassignment Travel Service Guide*.

Approval Queue Management – Professional Travel Only

If the company uses Professional Travel **and** if a manager/approver is not available to approve a trip **and** if the manager/approver has not enabled the Travel Vacation Reassignment feature, the Travel Administrator can reassign the approval request to another manager/approver.

The admin clicks **Administration > Company Admin > Approval Queues** (left menu).

The screenshot shows the Concur interface for reassigning approval requests. The top navigation bar includes 'Administration' and 'Help'. The main header shows 'Company Admin Home' and 'Reassign Approval Requests'. A left-hand menu lists various admin functions, with 'Approval Queues' highlighted. The main content area contains a list of instructions: 1. Select a manager (left), 2. Check the items you wish to reassign (center), 3. Select the user who will take over responsibility for approving these items (right), and 4. Click Reassign. Below these instructions, there is a 'Manager' section with radio buttons for 'Company Admin' and 'Brown, Terry L.', and a 'Select' button. To the right, there is a section for 'Requests in Manager's Queue' showing 'No requests currently needing approval.' and an 'Assign Checked Requests To' field with a 'Reassign' button.

On the **Reassign Approval Requests** page, the admin selects the desired approver in the **Manager** section. The outstanding trips appear (none shown above). The admin selected the desired trips, chooses the backup approver, and clicks **Reassign**.

NOTE: In the new Concur Travel experience, the backup approver will receive an email notification for the trips assigned to them.

Queues

If approval (active or passive) is to be used, Concur Travel uses the following queues, as configured by the travel agency:

Defined Queues	Description
In Process	Concur Travel sends PNRs to this queue at the time of PNR creation.
Approval Hold	Unticketed PNRs placed in this queue have been sent through the approval process and are awaiting approval/rejection: <ul style="list-style-type: none">• If the trip is rejected, it will remain here for the travel agency to manage/cancel.• If the trip is approved, it will be placed in the ticketing queue but will also remain here for the travel agency to manage/remove.
Ticketing	If the trip is approved, it is sent to this queue. If the trip is rejected, it is left in the Approval Hold queue.
Cancel	Concur Travel sends PNRs to this queue if they have been cancelled via auto-cancel or need to be cancelled manually by the fulfillment agency

NOTE: PNRs may appear in multiple queues. For example, if a user creates a booking that requires approval and submits for purchase, it will be sent to the In Process and Approval Hold at the same time.



For configuration information, refer to the *Travel System Admin User Guide*.

Auto-Cancel

Auto-cancel for approvals automates the cancellation process based on certain criteria to avoid no-show fees, debit memos for the fulfillment agency, and the loss of value of an unused ticket.

Professional Travel

Auto-cancel is configurable for Professional Travel. Concur Travel recommends enabling this feature as a best practice.



For configuration information, refer to the *Auto-Cancel Fact Sheet*.

Standard Travel

Auto-cancel is auto-on. This setting is not available for change in Standard Travel.

PNR Finishing

If customers or agency fulfillment partners need to document approval-related information in the GDS PNR, the **Force Finishing before Approval** option can be selected in **PNR Finishing Configuration** section of the travel configuration page.

As an example, this is useful for documenting approver contact details in the event an agency fulfillment partner needs to follow up with the manager/approver to obtain the trip approved in time for travel.



For configuration information about this setting, refer to the *PNR Finishing Configuration Options* section of the *Travel System Admin User Guide*.

⚠ IMPORTANT: This configuration option is mandatory for Concur Travel and Request integrated customers. For more information, refer to the *Concur Travel Integrated with Concur Request* appendix in this guide.

Section 6: Approvals – What the User Sees

Typical Approval Scenario

As described previously, fares are noted with a policy icon if a travel rule has been broken. In this example, the car is out of policy due to a rule set to *Log for Reports*.

Alamo
Economy Car - \$50.52 per day (Sabre)
Unlimited miles
Automatic transmission (Corporate rate)
Total cost* \$72.37
Preferred Vendor for Concur / E-Receipt Enabled ⓘ Location info

The user can click the policy icon to see the rule information.

enterprise
Compact Car - \$57.71
Unlimited miles
Pick-up: Terminal: ORD
Automatic transmission
Total cost* \$90.08
E-Receipt Enabled ⓘ Location info

Warning
This option breaks one or more company travel rules.
We will log this choice if you choose to purchase it.
⚠ Car rate greater than \$35 per day

When the user clicks the blue selection (price) button, the **Travel Policy Violation** window appears. The user must provide a reason for choosing the out-of-policy flight (or car or hotel, whichever applies). Explanation text may also be required, depending on configuration settings.

NOTE: By setting the **Rule Violation Explanation Required** option in Module Management to **True**, this allows the traveler to enter a comment in the text box provided.

Travel Policy Violation

⚠ This flight is not in compliance with the following travel rule(s):

- Please select reason why this trip was booked less than 7 days in advance.

Please choose the reason for selecting this travel option. If more than one reason applies, choose the most applicable. This reason applies to this entire trip.

-- Please Choose a Reason --

Please explain why you have chosen this flight. Note, Concur logs all trip exceptions.

Save Cancel

The selected fare was: \$962.00
 The least cost logical fare was: \$701.80

The **Travel Policy Violation** window may also provide additional information, such as lower-priced fares, if that information is applicable to the violation.

For the new Concur Travel experience, this section is displayed if the user has selected an offer that violates their company travel policy. The user will be shown which rule(s) were broken, allowed to select a travel policy violation reason from the dropdown options, and/or provide additional justification via the Comments text box.

Travel Policy

⚠ Your rental car selection exceeds 15% of the cheapest option.

Provide a reason for the travel policy violation

Select a reason

Comments

The user continues, as usual, with the booking.

For *Require Approval*, on the **Trip Confirmation** page, a message indicates that the ticket will not be issued until the trip is approved.

Trip Summary

Flights Reserved

Round Trip
SEA - MEX
Outbound: Tue, 04/14/2015
Return: Wed, 04/15/2015

Finalize Trip

[Review Travel Details](#)

Trip Confirmation

To COMPLETE BOOKING, please press the "Confirm Booking" Button after reviewing this page. To CANCEL, press the Cancel button.

This reservation will not be ticketed until your request is approved.

Trip Overview

Trip Name: Trip from Seattle to Mexico City

Start Date: Apr 14, 2015

For *Require Passive Approval*, on the **Trip Confirmation** page, a message indicates that the ticket will not be issued until the trip is approved or the ticketing deadline is about to expire.

Trip Confirmation

To COMPLETE BOOKING, please press the "Confirm Booking" Button after reviewing this page. To CANCEL, press the Cancel button.

After you complete this booking, it will be reserved; however, it will not be ticketed until it is either approved by your company or the ticketing deadline is about to expire.

Trip Overview

Trip Name: Trip from Washington to Denver

Start Date: Feb 4, 2015

End Date: Feb 9, 2015

Created: Dec 11, 2014, Katie Admin (Modified: Dec 11, 2014)

Description: (No Description Available)

Comments to Agent: DEMO. TEST TRIP. DO NOT BOOK. DO NOT CANCEL UNTIL AFTER Dec 11 10PM

Agency Record Locator: GBLGNS

Passengers: Katie Admin

Total Estimated Cost: \$290.40 USD

This trip requires approval.
Trip will be approved automatically unless rejects it before the deadline: 12/12/2014 9:00 PM Eastern

NOTE: The fare is not guaranteed until the ticket is issued.

On the Concur Travel home page, the trip appears on the **Upcoming Trips** tab.

For *Require Approval*:

Company Notes
Upcoming Trips
Trips Awaiting Approval
Remove Trips

Policy for Expense Reports US Expense Policy

Trip Name/Description	Status	Start Date	End Date	Action
Trip from Seattle to Mexico City (Z83JKM)	Awaiting approval by Terry L. Brown Approval deadline is 12/14/2014 07:00 pm Eastern.	04/14/2015	04/15/2015	Cancel Trip

For Require Passive Approval:

Company Notes		Upcoming Trips	Trips Awaiting Approval	
Trip Name/Description	Status	Start Date	End Date	Action
Trip from Washington to Denver (GBLGNS)	Trip will be approved automatically unless William T Never rejects it before the deadline: 12/12/2014 06:39 pm Eastern	02/04/2015	02/09/2015	Cancel Trip

When the manager/approver either approves or rejects the trip, Concur Travel sends the user an email with the status. In addition, the status appears on the Travel home page.

Company Notes		Upcoming Trips	Trips Awaiting Approval	Remove Trips
				Policy for Expense Reports US Expense Policy
Trip Name/Description	Status	Start Date	End Date	Action
Trip from Seattle to Mexico City (Z83JKM)	Rejected	04/14/2015	04/15/2015	

If the manager/approver rejects the trip, the user clicks the trip name; the **Rejected Request** window appears.

Rejected Request

Rejected Request

Item Name: Trip Description Meeting Name Submitted By: Submitted on: Approval Status/History: History/Notes:	Car Reservation at DENVER No description William Never Thursday, January 29, 2015 12:41 pm Eastern Time Rejected by William Never on Thursday, January 29, 2015 12:48 pm Eastern time. Request Created on Thursday, January 29, 2015 at 12:40 pm Eastern time by William Never.
Car segment <i>Car Segment in Denver</i> added on Thursday, January 29, 2015 at 12:40 pm Eastern time. No rules were broken.	
The Itinerary has still been reserved. The travel approver must approve the trip, or the traveler must withdraw the trip request to cancel the reservation.	
Email has been sent : rachel.brusch@concur.com	
Rejected via EMail on Thursday, January 29, 2015 at 12:48 pm Eastern Time by: William Never	
Itinerary Rule Violation All trips - Require Approval	

Resubmit
Withdraw Request
Cancel

The user can click **Resubmit** or **Withdraw Request**. If the user clicks **Withdraw Request**, the user sees a message advising that if they continue, the trip will be cancelled.

WARNING: You are about to withdraw your request. If you do this, all reservations (including flight, hotel, rental car, and rail) will be cancelled.

If you cancel a trip on the day of the planned trip and have hotel reservations that have been guaranteed for late arrival, you must call the hotel directly or risk paying a no-show charge. Concur cannot cancel hotel reservations made when you contacted the hotel directly.

If you have any questions, please contact your travel agent.

If you are SURE that you want to withdraw this request then please click OK. Otherwise, click CANCEL.

NOTE: Travel arrangers booking on behalf of a traveler will also receive the rejection or approval email *if* they indicate that they want to receive such notifications. The setting is set to default on but can be modified at **Profile > Profile Settings > System Settings** (left menu).


Email Notifications

- Send an email every time something is put in or removed from my approval queue
- Send a daily summary of items in my queue
- Let me know when one of my requests is approved or denied
- Send Confirmation Emails ?
- Send Trip-on-Hold Reminder Emails ?
- Send Ticketed Travel Reminder Email ?
- Send Cancellation Emails ?

Instant Purchase Scenario

Instant purchase options appear the same way to end users, to include:

- The policy icon appears on the flight results page.



5. Doubletree Arctic Club Seattle Downtown
700 3rd Ave at Cherry St, Seattle, WA 98104 [Map it](#)

0.19 miles ★★★★☆

From **\$244**

[Hide Rooms](#)

Most Preferred Vendor for Concur

[Hotel details](#)

Room Options

Best Available Rate - 1 Queen Bed-nonsmoking With Shower Only Hi Speed 9.95/day-sweet Dreams Experience Bed (Rate Code: A09LV0) (Sabre)

[Rate details / Cancellation policy](#)

✔ **\$244**

Prepayment Required

- The notification appears on the finalized itinerary, indicating that manager approval is required.

Finished!

You have successfully booked your trip!

Trip Record Locator : OYCAKU

The itinerary will not be ticketed until your travel manager has approved the trip.
Your itinerary has been saved.

Please Note: Fares are not guaranteed until tickets are issued and are subject to change without notice.

Travel Contact Information
0900 - 1700: 866-390-7206
Online Support - 866-390-7206 Hours 9am- 5pm ET
888-444-5555 XX

TRIP OVERVIEW

- The approval-based status appears on the **Upcoming Trips** tab on the Travel home page.

Travel Alerts

i **Triplt** creates instant mobile itineraries for business and personal trips. Simply connect your Concur account to **Triplt**. [Connect to Triplt](#) No thanks

i You haven't signed up to receive e-receipts. [Sign up here](#)

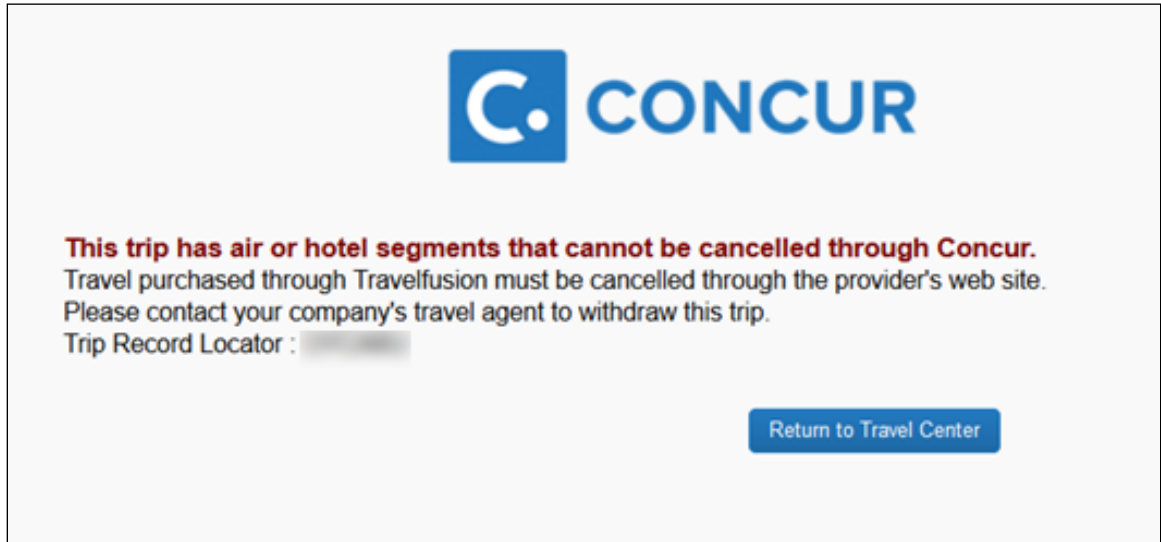
Company Notes

Upcoming Trips

Trips Awaiting Approval

Trip Name/Description	Status	Start Date	End Date	Action
WebDirect Flight: SEN to AMS (OYCAKU)	<p>Awaiting approval by Tereza Pytacek Haismanova</p> <p>Approval deadline is 19/11/2015 07:00 pm E. Europe.</p> <p>Trip will be automatically cancelled if not approved by then.</p>	20/11/2015	21/11/2015	Cancel Trip

The only significant difference the end user may see is if they attempt to cancel the reservation:



Section 7: Approvals – What the Approver Sees

Typical Approval Scenario

When the user confirms the trip, Concur Travel sends an approval email to the manager/ approver. The manager/approver logs into Concur Travel and sees the trip on the Travel home page, on the **Trips Awaiting Approval** tab.

Name	Trip Name	Locator	Booked	Travel Dates	Approve/Reject By
Chris Collins	Trip from Seattle to Mexico City	Z83JKM	12/10/2014	04/14/2015 - 04/15/2015	Sunday, December 14, 2014 07:00 pm Eastern time

The manager/approver clicks the trip name to open the request. The **Request Requiring Your Approval** window appears.

Request Requiring Your Approval

Request Requiring Your Approval
 This trip must be approved by: **Sunday, December 14, 2014 07:00 pm Eastern time.**

Approve
Reject
Close

Request Status/History Travel Itinerary

Item Name: Trip from Seattle to Mexico City
 Trip Description: *No description*
 Meeting Name:
 Submitted By: Chris Collins
 Submitted on: Thursday, December 11, 2014 12:16 am Eastern Time
 Last Ticket Date: Sunday, December 14, 2014 09:00 pm Eastern Time
 Approval Status/History: Requires Approval by Terry Brown.
 History/Notes: Request Created on Thursday, December 11, 2014 at 12:15 am Eastern time by Chris L Collins.

Flight segment *Air Segment* added on Thursday, December 11, 2014 at 12:15 am Eastern time.

This itinerary violates company policy and must be approved before it is ticketed. The itinerary has still been reserved. The travel approver must approve the trip, or the traveler must withdraw the trip request to cancel the reservation.

Email has been sent : terrybrown@randomverbs.com


Flight Rule Violation
 International flights must be approved. - Require Approval
 Cabin classes allowed: First class, Business class

	Seattle Tacoma Intl Arpt (SEA) to Salt Lake City Intl Arpt (SLC)
Flight:	DELTA Flight # 1634 Y
Departure:	Seattle Tacoma Intl Arpt (SEA) Tue 04/14/2015 at 6:00 AM
Arrival:	Salt Lake City Intl Arpt (SLC) Tue 04/14/2015 at 8:55 AM

The manager/approver reviews all of the information and then clicks **Approve** or **Reject**.

- **Approve:** If the manager/approver approves the trip, it then goes through finishing and then moves into the fulfillment agency's ticketing queue. Concur Travel sends the traveler an email advising that the trip was approved.
- **Reject:** If the manager/approver rejects the trip, the manager/approver enters a comment. Concur Travel sends the traveler an email advising that the trip was rejected. The user can either change the trip, if allowed, or cancel the trip.

For the new Concur Travel experience, the approver will receive an email when the Notify Manager policy is violated. The approval options, **Require Active** and **Require Passive**, are not currently supported.


SAP Concur 

Travel Notification for Traveler [REDACTED]

This is a copy of the traveler's itinerary. It requires no action on your part.





Trip Overview

Status: Confirmed Confirmation: 1767404474COUNT



 **Pickup**
 Thursday, December 29, 2022 10:00 AM
 3211 GRANT MCCONACHIE WAY,


Dropoff
 Friday, December 30, 2022 10:00 AM
 3211 GRANT MCCONACHIE WAY,

Economy Car - KIA RIO

 Seats: 4  Large Bags: 2  Doors: 4  Automatic Transmission

Booking includes

 Unlimited Mileage  Air Conditioning

 Car picked up in country/region CA
 Larger car required as sharing with additional traveler - test multiple comments

Total Cost

Rental Car	CA\$86.85
Estimated Total Cost	CA\$86.85

Please do not reply to this message. This email was sent from a notification-only email address that cannot accept incoming email.
 You are viewing this transactional email based on a recent booking or account-related update.

Instant Purchase Scenario

Instant purchase bookings look no different to approvers. The only difference is that **any action the approver takes – approval or rejection – will always result in trip approval**. This occurs because there is no other action Concur Travel can logically take in the case of rejection – the trip has already been ticketed by the vendor and the applicable form of payment has already been charged for the ticket.

If customers do not want to allow instant purchase reservations to proceed in the case where there is a policy violation, Concur Travel recommends setting the travel configuration option, **Access to Guaranteed Ticketing carriers**, to use one of the more restrictive options available.



For configuration information about this setting, refer to the *Wizard Options – Air Search Options* section of the *Travel System Admin User Guide*.

Section 8: Approvals – Changes

Changes Before Approval/Rejection

Assume that a user has booked a trip with an out-of-policy flight. Concur Travel sends the manager/approver the approval email and places the PNR in the approval hold queue. Further assume that before the manager/approver approves, the user makes a change to the trip that creates another out-of-policy situation.

Concur Travel sends the manager/approver a second email, showing the updated itinerary and violation(s). Then:

- If the manager/approver approves or rejects using the **first** email, Concur Travel sends a notification email stating that the manager/approver needs to use the **second** email.
- If the manager/approver approves/rejects using the **second** email, the approval/rejection is successful. Concur Travel sends the notification email to the user as usual.

⚠ BEST PRACTICE: Concur Travel recommends that users do not mix active and passive approvals on the same travel configuration.

In the new Concur Travel experience, assume that a user has booked a trip with a passive approval. If, before the manager or approver approves, the user makes a change to the trip that makes the trip require approval, the trip will still require passive approval (unlike the original experience where it will be upgraded to active approval). The manager will receive an updated passive approval e-mail.

Changes After Rejection

Assume that a user has booked a trip with an out-of-policy flight. Concur Travel sends the manager/approver the approval email and the manager/approver rejects the trip.

- If either setting below has been enabled in the travel configuration, then Concur Travel automatically cancels the trip (according to segment type as noted in the settings). The user will likely have to create a new booking in order to reapply for approval, if he does not resubmit the rejected itinerary prior to the auto-cancellation.

The settings are:

- ♦ **Allow Auto Cancel of air/rail trips that are rejected:** If enabled, cancellation will take place after an approver rejects a trip that contains an air segment. Concur then cancels all cancellable segments of the entire trip (instant purchase carriers will not be cancelled) based on the ticketing deadline or within 24 hours of travel (whichever is sooner), that is, the trip is not cancelled immediately after rejection by the approver.

- ◆ **Allow Immediate Cancel of non-air/rail trips that are rejected:** If enabled, Concur Travel cancels the trip within 20 minutes of the reject action.

For Professional Travel, refer to refer to the *Wizard Options – General Options* section of the *Travel System Admin User Guide* for more information.

For Standard Travel, these settings are set to ON and are not available for change.

- If neither setting is enabled, the user can resubmit the trip for approval. After re-submittal, the trip will become editable and allow changes. When re-submitting a trip for approval, Concur Travel sends the manager/approver a text-only notification email to reconsider (approve or reject) the revised trip.

Rejected Request

Rejected Request

<p>Item Name: Trip Description Meeting Name Submitted By: Submitted on: Approval Status/History: History/Notes:</p>	<p>Car Reservation at DENVER <i>No description</i></p> <p>William Never Thursday, January 29, 2015 12:41 pm Eastern Time Rejected by William Never on Thursday, January 29, 2015 12:48 pm Eastern time. Request Created on Thursday, January 29, 2015 at 12:40 pm Eastern time by William Never.</p>
---	--

Car segment *Car Segment in Denver* added on Thursday, January 29, 2015 at 12:40 pm Eastern time.
No rules were broken.


The Itinerary has still been reserved. The travel approver must approve the trip, or the traveler must withdraw the trip request to cancel the reservation.

Email has been sent : rachel.brusch@concur.com

Rejected via EMail on Thursday, January 29, 2015 at 12:48 pm Eastern Time by: William Never

Itinerary Rule Violation
All trips - Require Approval

Resubmit
Withdraw Request
Cancel



Di 11.12.2018 16:15

Approval Queue <ApprovalDaemon@concursolutions.com>

The request 'Trip from Paris to Warsaw' has been placed in your approval queue.

To

The request 'Trip from Paris to Warsaw', submitted by Erwin Lottemann, is awaiting your attention.

Please log into Concur to review and approve it.

This is a system-generated email. Please do not reply.

Changes After Approval

Assume that a manager/approver approves a trip, which now displays as *Confirmed* status, is no longer in the Approval Hold queue, and has been sent to the agency for fulfillment.

This will occur:

- If the modification is within policy, the normal process applies.
- If the modification is out of policy (meaning a rule was violated), then:
 - ◆ If the rule action is *Log for Reports* or *Notify Manager*, the rule would work the same as if it was a new trip.
 - ◆ If the rule action is *Require Passive Approval* or *Require Approval*, then:
 - The yellow (orange with Fiori theme) caution icon remains.
 - The user/arranger selects a reason why they selected an out-of-policy option.
 - The messaging reflects a *Notify Manager* status.
 - Concur Travel sends the manager/approver a notification.
 - The trip will not be stopped for approval.
 - Logging and Request details will indicate *Notify Manager*.

Section 9: Approvals – Offline (Agent Booked)

Overview

This process is supported for all GDSs.

The Offline Approval feature allows clients to send offline (booked directly with the travel agency) PNRs to an approval queue. Concur Travel imports these PNRs and sends them through the trip approval process, similar to the way it is done for online trips.

The Offline Approval queue does not take into account travel policy, meaning it does not follow any rules put in place via travel policy admin. The reservation is sent "as is" to the approval queue and subsequently to the manager/approver. It is up to the travel agent to know when to place the PNR in this queue.

Just like online approvals:

- The offline approval process uses the configured approval flow, as defined in the configuration section of this guide. This feature cannot be used with custom approval scenarios.
- Both *Require Approval* and *Require Passive Approval* scenarios are supported.
- Concur Travel sends the manager/approver an email.

NOTE: The email contains the itinerary, but it does not contain the options the user *could* have chosen.

- The trip appears on the **Upcoming Trips** tab. The trip name is *Trip Booked via Agent*.
 - The manager/approver approves or rejects the trip as usual.
 - Concur Travel sends the email to the user, whether the trip is approved or rejected.
-

NOTE: The approval process for offline bookings works only once. Similar to what is described above in the *Changes After Approval* section, the approval process discussed above only works the first time a trip is sent to the offline approval queue.

Queues

If the Offline Approval feature is used, Concur Travel will utilize the following queues, as configured by the travel agency:

Defined Queues	Description
Approval hold	Unticketed PNRs placed in this queue have been sent through the approval process and are awaiting approval/rejection: <ul style="list-style-type: none">• If the trip is rejected, it will remain here for the travel agency to manage/cancel.• If the trip is approved, it will be placed in the ticketing queue but will also remain here for the travel agency to manage/remove.
Offline Approval queue	All GDSs are supported. IMPORTANT: Only unticketed, agent-booked PNRs must be placed in this queue by the fulfillment agency if approval is required via Travel. The approval process for offline PNRs is actually triggered from this queue. <ul style="list-style-type: none">• For an online booking, the approval process triggers automatically when the system finds that the trip has violated a rule requiring approval.• For an offline booking, there is no consistent way to know if the trip is compliant with all rules so Concur Travel relies on the fulfillment agency to make that determination and then place it in the Offline Approval queue, which tells Concur Travel it needs to go through the approval process.

Defined Queues	Description
Offline Approval Error queue	<p>In the event that Concur Travel is unable to process the agent-booked PNR, the PNR is queued here (instead of the Approval Hold queue), for reasons such as:</p> <ul style="list-style-type: none"> • missing CLIQUER • emulation failures • bad formatting of data • reservation (PNR) has already been ticketed <p>This allows TMCs to monitor a specific queue and take action to ensure they can be approved before the traveler's departure.</p>



For more information about queues, refer to the *Travel System Admin User Guide*.

Finishing

All offline approval reservations imported into Concur Travel are sent through file finishing. If offline approval is enabled, Concur Travel recommends the travel agency review the PNR template attached and update where necessary. Elements can be set up to add only if the data is missing.

Elements can also be set up to add or not add depending on whether it is an agent booked trip:



For PNR Finishing information, refer to the *PNR Finishing Template Editor Guide*.

General Remarks

For offline approvals, a general remark line containing CLIQUER must be present. This allows Concur Travel to match the offline trip to the user within Concur Travel.

This line can be added manually by an agent or can be built into the GDS profile. The latter is preferred because it requires no extra work on the part of the agent.

NOTE: This remark line should be present in all PNRs because it is used by Concur Travel for several reasons. All customers should work with their SAP Concur representative to ensure this is set up correctly. In particular, each customer should determine how the @ sign should be handled.

Galileo examples:

NP.H*CLIQUER-WILLIAM.NEVER//CONCUR.COM

NP.H*S96-CLIQUER-WILLIAM.NEVER//CONCUR.COM

Apollo example:

T-S96-CLIQUER-WILLIAM.NEVER//CONCUR.COM

Sabre/Abacus example:

5.CLIQUER-WILLIAM.NEVER@CONCUR.COM

Amadeus example:

RM*CLIQUER-WILLIAM.NEVER@CONCUR.COM

Worldspan example:

5PK-U26/CLIQUER-WILLIAM.NEVER@CONCUR.COM

Known Limitations

Please note the following:

- Regardless of the trip state or approval configuration settings, PNRs placed in the offline approval queue will trigger the approval email to the manager/approver. Do not place PNRs on this queue unless:
 - ◆ Approval is required
 - ◆ PNR is unticketed (air/rail)
 - ◆ PNR originated offline
- The offline approval process does **not** apply policy. It will only send the trip to the approver. The manager/approver could call the agency for more detail but it will not be available in the email or in Concur Travel.
- This feature does not work for non-profiled travelers.
- This feature does not work for custom trip approval sites.
- The Concur Travel Company ID and User ID must be present in the PNR in the supported formats for this to work.

Concur Travel Integrated with Concur Request

This situation requires special handling.



For more information, refer to the *Concur Travel Integrated with Concur Request* appendix in this guide.

Section 10: Approvals – TripLink



Refer to the *TripLink User Guide*.

Section 11: Approvals – Reports

Much of the approval information is available in the Travel reports.



For complete details, refer to the *Travel Reporting User Guide*.

Section 12: Rules – General Information, Categories, Rule Action Hierarchy, Best Practices, and Tips

Pre-Defined and Custom Rules



Both Professional and Standard Travel provide a set of pre-defined rules. The admin can customize and enable any of them as needed. In addition, the admin can create custom rules using Travel Rule Builder.

Both processes are described in the configuration pages in the guide.

Rule Categories

All rules – whether provided by default or created by an admin – are divided into these categories.

Rule category	Description/Action
Travel Itinerary	Use these rules to define: <ul style="list-style-type: none">The allowed number of days prior to a trip that users must make the bookingHow long trips can beOther general rules related to booking a trip

Rule category	Description/Action
Flight Flight - View More Air Fares Flight – Class of Service Flight – Flex Fare Buckets	Use these rules to define: <ul style="list-style-type: none"> Determines the lowest logical fare (LLF) benchmark to apply other fares against  For complete details, refer to the <i>Lowest Logical Fare (LLF) / Benchmark Lowest Airfare Travel Service Guide</i>. What is allowed for air fares and flight class The length of flight before business or first class is allowed Other restrictions related to flights
Ticket Change	Use rules in this category to define how post-ticket changes are handled.
Train	Use these rules to manage trip duration, use of preferred vendors, and the number of train changes associated with a specified list of rail vendors.
Car	Use these rules to define the allowed options for rental cars including restrictions such as preferred vendor, car size, or price per day.
Hotel	Use these rules to define the allowed options for hotels including restrictions such as limiting hotels by preferred property or chain, price, or city rate.
Web Air	Use these rules to determine how Web Air (Travelfusion) options appear to users.
TripLink	This option appears if your company uses TripLink. Use these rules to apply policy to TripLink itineraries and capture booking details for reporting.
Messages (Flight, etc.)	 For complete details, refer to <i>Configurable Message Boards Travel Service Guide</i> . This option is not available in rules in Standard Travel. Configurable Messaging is on a separate tab in the setup wizard.

Rule Action Hierarchy

Enforcement Order

Concur Travel rules follow a hierarchy, where rules with *higher* rule action take precedence over rules with *lower* rule action. In **ascending** order:

- Allow / Display Message
- Log for Reports
- Notify Manager
- Require Passive Approval
- Require Approval
- Show, but Do Not Allow
- Hide Results

- **Mark in Policy:** Currently, this rule action is used only for lane rules. When there are conflicts between rules, rules using the *Hide Results* rule action will be overridden. **Example:** "Preferred carrier on lane" rule – when set to *Mark in Policy*, that carrier on that lane is always shown as In Policy.

Run Order

Rules *run* in a slightly different order. When running rules, Concur Travel applies all *Hide Results* rules first, so hidden results do not interfere with other rules.

Example: If the lowest fare is hidden, Concur Travel will not consider it for another rule, such as "Air Fare is greater than \$100.00." Rules that require the LLF are applied last.

Best Practice: Tips for Creating and Activating Rules

Whether the admin creates a new rule or activates an existing rule, the admin should keep the following in mind.

- **Design and enable rules using a holistic approach:** User compliance and adoption will be higher with easy-to-follow, logical rules. The more complicated and restrictive it becomes, the more likely a user will find other options for booking travel – at which time, the company can lose the ability to enforce compliance.
- **Rules can run independently or can be combined:** Though each rule can stand on its own, rules can be combined for more precise or specific results. However, combined rules do not always provide the intended results.

Example 1: Assume the admin creates this rule: Cabin classes allowed: Premium Economy when Flight duration of all flights in a segment (excluding layovers) is greater than or equal to 600 minutes – Allow

The above rule combines two rule parts - Cabin classes allowed: Premium Economy and Flight duration of all flights in a segment (excluding layovers) is greater than or equal to 600 minutes. The enforcement level is set to: "Allow".

The rules engine checks across all segments of the trip. If the outbound segment matches one rule part (e.g. it is Premium Eco) and the return segment matches the other rule part (e.g. flight duration is over 600 minutes), then it is considered a match and the rule is triggered.

Since the two rule parts are connected with an AND condition, so the flight offer must match both rule parts for the rule to apply. If an "or" condition is used, then the flight offer can match any rule parts for the rule to apply.

Example2: Assume the admin creates this rule: "Flight departure date is on 05/01/16" combined with "Flight depart time is before 8:00 am."

The admin may assume that this rule applies a condition (test) on the outbound flight, or that both conditions will be verified jointly against a given flight, like "does the trip contain a May 1 flight departing before 8:00 AM." In fact, it means: "Does the trip contain a flight that departs on May 1? Does the trip also contain a flight that departs before 8:00 AM?"

Therefore, if there is an outbound flight on May 1 and the return flight leaves before 8:00 AM, this rule sees a match – which is likely not the admin's intent. In this case, the combined date and time rule should be used (Flight departure date/time is...), which will make both conditions apply to the same flight.

- **Simple is best:** For a combined rule, it is best to *not* combine more than three rules. This is not a technical limitation; the admin can combine any number of rules and the combined rule will work, but it may cause confusion for the traveler. Also, the more parts that are combined, the more opportunity for the rule *not* to work as expected. In this case, more is not necessarily better.
- **Hide Results should not be used:** Hiding results can create confusion with users. If they know a hotel or flight should be available but it is not displayed in Travel, the user may think the tool is faulty. This may encourage users to book travel elsewhere. That likely weakens the company's ability to enforce compliance.

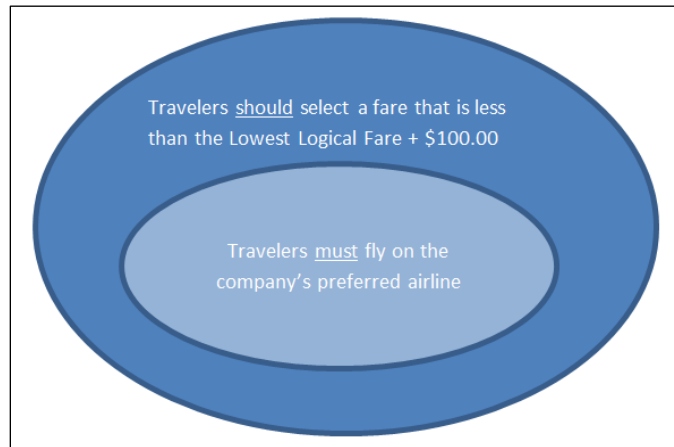
Using *Show, but Do Not Allow* and *Require Approval* with appropriate messaging are far better options. The user will see the expected hotel or flight in the search results but also see that they are not available for booking. Effective messaging gives travel managers the opportunity to explain *why* the options are not available.

- **Hotel rules and the Hide Results rule action:** Hotel rules apply to the *rates* of a given property, not the display of the property in the hotel results. Though the *Hide Results* rules action will completely hide an airline from search result, for hotel, it will indicate that the hotel has no rates.

This can be confusing to a user who happens to know that a property has rooms available. Though it is still better than hiding the property, the admin should pay special attention to proper messaging so the user understands the situation.

- **Be thoughtful with rule creation:** Creating rules that are similar will often cause the rules to cancel each other out.
- **Be careful when limiting vendors:** It may be tempting to create a rule that makes only preferred vendors available for booking. This will create an issue in those locations where preferred vendors are not available, leaving the user no options. The user may then seek other booking options, eventually resulting in the company losing control of compliance.

- **Message text:** Any message text should be written and/or formatted directly in the Concur Travel. Admins should **never** copy/paste text from Word or other editors. Also, **Concur Travel does not support HTML in these places.**
- **Map it out:** One of the best ways to ensure the admin is writing the more complex rules properly is for the admin to draw out the conditions using methods similar to Venn diagrams:



- **Evaluate new rules against existing rules:** The admin should review all other rules that are enabled for the travel class/policy. Based on the hierarchy information described above, determine if any new rules will take precedence over existing rules, or vice versa.
- **Test, Test, TEST:** The admin must allow plenty of time to test. It is not possible to over-test before enabling a rule.
- **Ask for help:** When in doubt, the admin should submit a support ticket or open a TMC Question.
- **Solution Suggestions:** The admin can create a Solution Suggestion if they need a condition that is not currently available. Concur Travel often evaluates requests for rule.

Section 13: Configuration – Professional Travel

Overview

Travel managers and/or agency fulfillment partners have a great deal of flexibility within Concur Travel when it comes to travel policy management.

This Section

This section provides details about these travel class activities:

- **Travel Class:** Create, clone, and delete a travel class.
- **Class Features:** Enable *class features*, for example, to allow users to book ground transportation (limos) or user-supplied hotels.
- **Approval Workflow:** Define the approval workflow for a travel class.
- **Rules:**
 - ◆ Enable and modify existing rules
 - ◆ Clone (replace or copy) rules across travel classes
 - ◆ Use Travel Rule Builder
 - ◆ Use Track Changes
- **Violation Reasons:** Create and modify policy violation reasons.

Lowest Logical Fare (LLF)

Lowest Logical Fare (LLF) is part of the travel class and is closely associated with rules. It is mentioned in this guide but is ***not covered in detail***.



For complete details, refer to the *Lowest Logical Fare (LLF) / Benchmark Lowest Airfare Travel Service Guide*.

Access Travel Policy Administration

The configuration tasks listed above – except for Travel Rule Builder – are completed using the **Travel Policy Administration** page.

Travel Policy Administration

Travel Policy Policy Violation Reasons Travelfusion Suppliers Vendor FoID Admin Travel Vendor

Rule Class (Edit Classes)

CLQ-43003 Greater Than Or Equal Save Clone Rules Track Changes

Choose who will handle the approvals:

Manager Designate Travel Approver

1 Manager(s)

Travel Itinerary (Edit)

- No Rules Enabled

▶ **To access the Travel Policy Administration page:**

1. Click **Administration** > **Company** (on the sub-menu) > **Company Admin**.

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration** by clicking **Administration** > **Travel** > **Travel Admin** or **Administration** > **Travel Admin**.

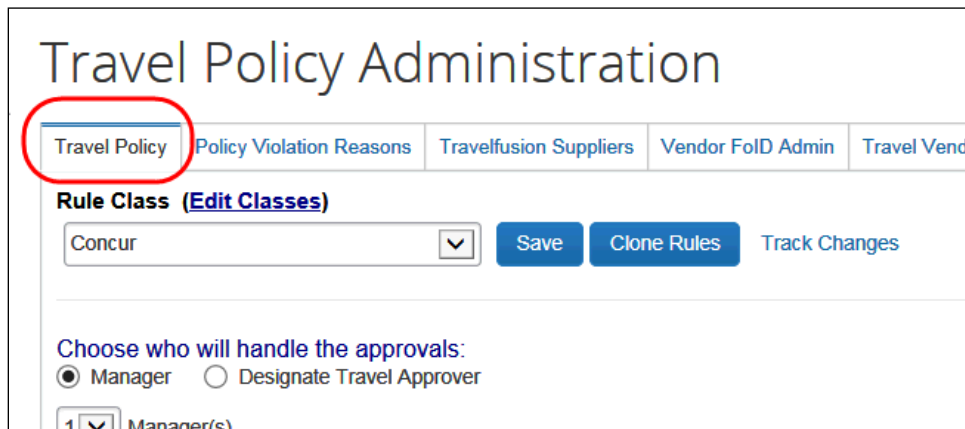
2. In the **Travel Administration** section of the left menu, click **Travel Admin**. The **Travel Policy Administration** page appears.

Travel Class

Create a New Travel Class










▶ **To create a new travel class:**

1. On the **Travel Policy** tab of the **Travel Policy Administration** page, click **Edit Classes** to the right of **Rule Class**.

















This page appears.

The screenshot shows the 'Company Travel Classes' page with the title 'Modify Travel Classes'. It contains a table with the following columns: Options, Travel Class Name, Travel Config, Property Config, Default, GSA: Allow Non-Refundable Air, and Self-Reg. The table lists three travel classes: Concur Amadeus, Concur Apollo, and Concur AU, all with 'Default US Configuration' and 'GSA: Allow Non-Refundable Air' checked.

Options	Travel Class Name	Travel Config	Property Config	Default	GSA: Allow Non-Refundable Air	Self-Reg
  	Concur Amadeus	Concur Amadeus	Default US Configuration		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
  	Concur Apollo	Concur Apollo	Default US Configuration		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
  	Concur AU	Concur Amadeus	Default US Configuration		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>


- On the bottom of the **Company Travel Classes** page, click **Add New Rule Class**.

  	Concur Amadeus	Concur Amadeus	Default US Configuration	<input checked="" type="checkbox"/>
  	Concur Apollo	Concur Apollo	Default US Configuration	<input checked="" type="checkbox"/>
  	Concur AU	Concur Amadeus	Default US Configuration	<input checked="" type="checkbox"/>
				
				
				
				
				

A new row appears at the top of the list.

Company Travel Classes

Modify Travel Classes

Options	Travel Class Name	Travel Config	Property Config	Default	GSA: Allow Non-Refundable Air ?
	<input style="border: 1px solid #ccc;" type="text" value="new user class"/>	<input style="border: 1px solid #ccc;" type="text" value="Outtask, Inc."/>	<input style="border: 1px solid #ccc;" type="text" value="Default US Configuration"/>	<input type="checkbox"/>	<input type="checkbox"/>

- In the **Travel Class Name** column, enter the name of the travel class.

NOTE: When adding a rule class for guest travelers, the class name must always be *Guest Class* or the rule will not work.

- In the **Travel Config** column, select the travel configuration to associate with the new class.
- In the **Property Config** column, select the property configuration to associate with the new travel class. In most cases, this will be the Default Configuration.

NOTE: Multiple property configurations can be configured for a customer by Concur Travel, as needed. This is generally used to differentiate profile and policy requirements for a subset of users within the company, such as different countries.

- Click **Save**. The new travel class appears in the list.

At this point, the travel class has only a name and an associated configuration. The next logical step is to:

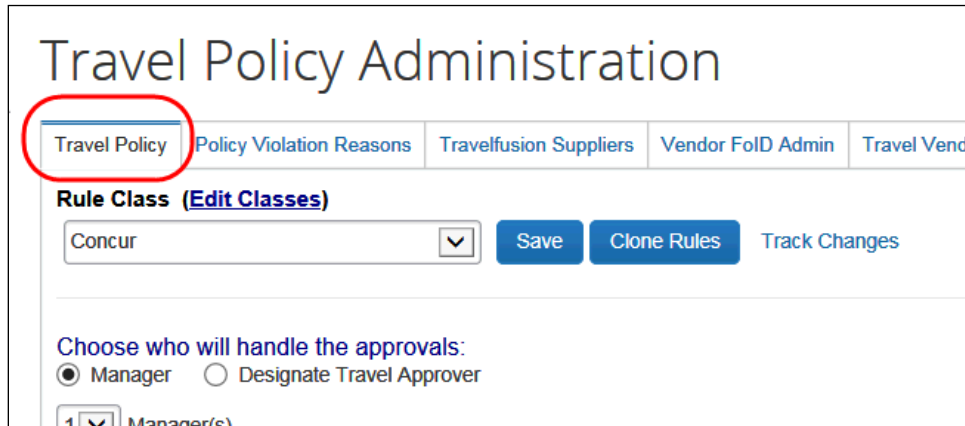
- ◆ Enable class features, like allowing users in this class to book ground transportation (limos) or user-supplied hotels, as described on the following pages.
- ◆ Define the approval flow and rules, as described on the following pages.
- ◆ Define the Lowest Logical Fare (LLF), as described in the *Lowest Logical Fare (LLF) / Benchmark Lowest Airfare Travel Service Guide*.


Clone an Entire Travel Class







To save time, consider cloning an existing travel class. You can clone an existing travel class – **which includes its class features, approval workflow, rules, and lowest logical fare (LLF) options** – even to a different travel configuration. Then, you can make the desired edits to the cloned copy.

► **To clone a travel class:**

- On the **Travel Policy** tab of the **Travel Policy Administration** page, click **Edit Classes** to the right of **Rule Class**.



- On the **Company Travel Classes** page, click the  icon in the **Options** column.

Options	Travel Class Name	Travel Config	Property Config	Default
  	Concur	CommaSavvy AUT Property Per Diem	Default Configuration	
  	Default Travel Class	CommaSavvy	Default Configuration	<input checked="" type="checkbox"/>

The new class appears at the top of the list and has the same options chosen as the class you copied. The name of the new class is the same as the original with a "Copy of" prefix.

Options	Travel Class Name	Travel Config	Property Config	Default	Res Air
Save	Copy of Concur	CommaSavvy	Default Configuration	<input type="checkbox"/>	<input type="checkbox"/>
	Concur	CommaSavvy AUT Property Per Diem	Default Configuration		
	Default Travel Class	CommaSavvy	Default Configuration	<input checked="" type="checkbox"/>	

3. Change the travel class name as desired. You can also change any of the options, including choosing a different travel configuration, property configuration, or the additional class feature check boxes.



Refer to *Enable Class Features* in this guide for information about the check boxes and definitions.

4. **At this point, the new class has not been created** - you must click **Save**. When you click **Save**, the new class appears, with the copied class features, approval workflow, rules, and lowest logical fare (LLF) options.
5. Make the desired changes (if any) to the rules, LLF, approval workflow, etc.

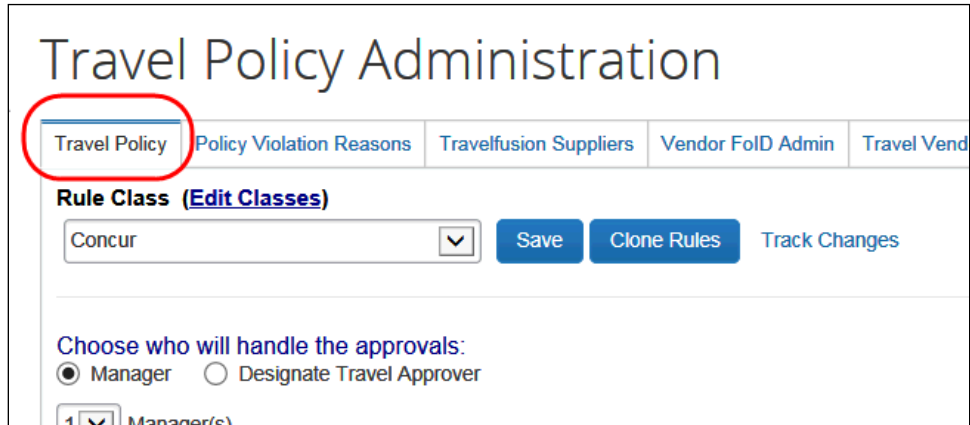
Delete an Entire Travel Class

When you delete a class, it deletes all of the associated class features, approval workflow, rules, and lowest logical fare (LLF) options.







You can delete a travel class if there are no users associated with that class. If you attempt to delete a class that has associated users, a list of associated users appears. Once you reassign those users to different classes, then you can delete the class.

▶ **To delete a travel class:**

1. On the **Travel Policy** tab of the **Travel Policy Administration** page, click **Edit Classes** to the right of **Rule Class**.



2. On the **Company Travel Classes** page, click the  icon in the **Options** column.

Options	Travel Class Name	Travel Config	Property Config	Default	GS NR Re Air
  	Concur	CommaSavvy AUT Property Per Diem	Default Configuration		
  	Default Travel Class	CommaSavvy	Default Configuration	<input checked="" type="checkbox"/>	

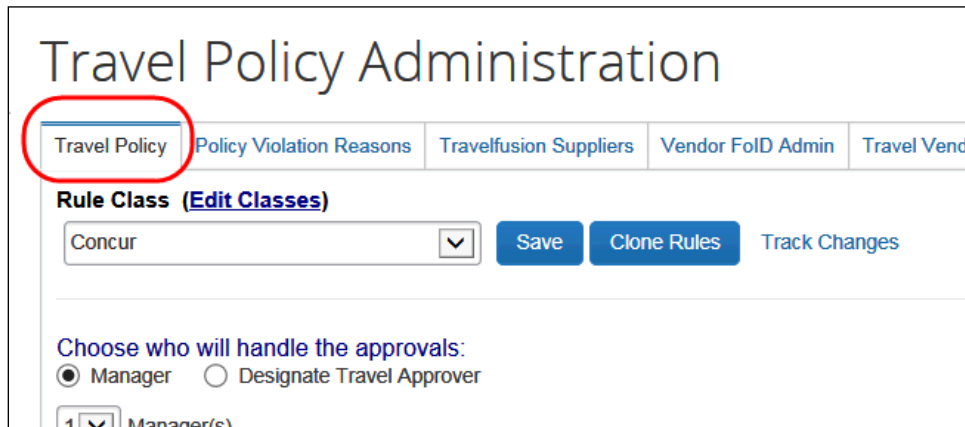
Class Features

Class features include allowing users to book ground transportation (limos) or user-supplied hotels or to.

Enable Class Features










▶ **To enable class features:**

1. On the **Travel Policy** tab of the **Travel Policy Administration** page, click **Edit Classes** to the right of **Rule Class**.






This page appears.

The screenshot shows the 'Company Travel Classes' page. The title is 'Company Travel Classes' and the subtitle is 'Modify Travel Classes'. Below the title is a table with the following columns: Options, Travel Class Name, Travel Config, Property Config, Default, GSA: Allow Non-Refundable Air (?), and Self-Reg (?). The table contains three rows of data, each with a green checkmark in the 'Self-Reg' column.

Options	Travel Class Name	Travel Config	Property Config	Default	GSA: Allow Non-Refundable Air (?)	Self-Reg (?)
  	Concur Amadeus	Concur Amadeus	Default US Configuration			<input checked="" type="checkbox"/>
  	Concur Apollo	Concur Apollo	Default US Configuration			<input checked="" type="checkbox"/>
  	Concur AU	Concur Amadeus	Default US Configuration			<input checked="" type="checkbox"/>

Upgrades to Prem. Econ. ?	Allow Ground ?	Manual Hotels ?	Tripit Privacy ?	Choose Rule Class Opt Out ?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default to Shared
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default to Shared
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default to Shared



- On the **Company Travel Classes** page, click the  icon in the **Options** column.



Options	Travel Class Name	Travel Config	Property Config	Default	GSA: Allow Non-Refundable Air ?	Self-Reg ?
	Concur Amadeus	Concur Amadeus	Default US Configuration	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Concur Apollo	Concur Apollo	Default US Configuration	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The check boxes for the class features become editable.

Property Config	Default	GSA: Allow Non-Refundable Air ?	Self-Reg ?	Upgrades to Prem. Econ. ?	Allow Ground ?	Manual Hotels ?	Tripit Privacy ?	Choose Rule Class Opt Out ?
Default Configuration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default to Shared	<input type="checkbox"/>
Default Configuration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default to Shared	<input type="checkbox"/>
Default Configuration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default to Shared	<input type="checkbox"/>

- Select (enable) the appropriate check boxes.

Option	Description/Action
Default	Select (enable) this check box to use as the default configuration.
GSA: Allow Non-Refundable Air	Select (enable) this check box to shop non-refundable fares. NOTE: This option is only relevant when the Use GSA City Pair Program Air Shopping Faring and Ticketing module property is enabled.  Refer to the <i>Government Features Travel Service Guide</i> .
Self-Reg	Select (enable) this check box to set the travel class as the default for users registering via self-registration.  For complete details, refer to the <i>Self-Registration Travel Service Guide</i> .

Option	Description/Action
Upgrades to Prem. Econ.	<p>Select (enable) this check box to have the one-class upgrade rule consider Premium Economy as one class up from Economy.</p> <ul style="list-style-type: none"> • If cleared (disabled), one-class upgrades will go from Economy to Business Class. • If selected (enabled), one-class upgrades will go from Economy to Premium Economy (when available) rather than Business Class.
Allow Ground	<p>If your company is configured for ground transportation bookings, select (enable) this check box to limit access to ground transportation bookings by travel class.</p> <p> For complete details, refer to the <i>Ground Content Suppliers Travel Service Guide</i>.</p>
Manual Hotels	<p>Select (enable) this check box to prompt users to supply hotel information when they book an overnight flight without a corresponding hotel segment.</p> <p> For complete details, refer to the <i>User Supplied Hotels Travel Service Guide</i>.</p>
TripIt Privacy	<p>TripIt users can link their TripIt account to Facebook, Twitter, and other social media. Before Concur Travel sends a trip to TripIt, Concur Travel lets the user choose whether the trip should be shared or private. The default is <i>shared</i>.</p> <p>Select one of the following:</p> <ul style="list-style-type: none"> • Default to Shared: <i>Shared</i> is the default but the user can change to <i>Private</i> • Default to Private: <i>Private</i> is the default but the user can change to <i>Shared</i> • Always Private: Force to <i>Private</i>; the user cannot change to <i>Shared</i>
Choose Rule Class Opt Out	<p>Select (enable) this check box; these are the results:</p> <ul style="list-style-type: none"> • Users in this rule class will not have the option to select a different class from the Choose your travel class list (in the travel wizard). • This rule class is removed from the Choose your travel class list (in the travel wizard) so that users who should not have access to that class cannot select it from the list.

4. Click **Save** on the left side of the line.

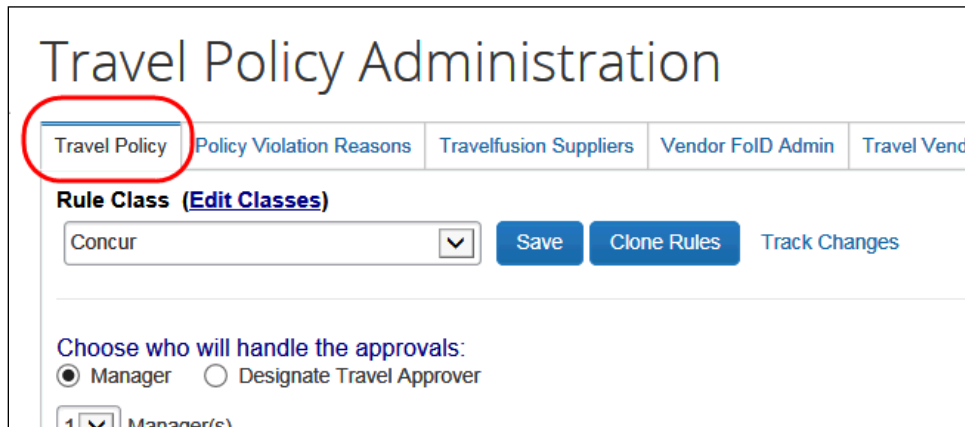
Approval Workflow

Define the Approval Workflow

Before defining the approval workflow, refer to *Professional Travel* in the *Approval Workflow Options* section of this guide for a complete understanding of how it works.

▶ **To define the approval workflow:**

1. On the **Travel Policy** tab of the **Travel Policy Administration** page, select the desired class from the **Rule Class** list.



The page refreshes, showing the rules for the selected class.

2. In the **Choose who will handle the approvals** section, click the appropriate manager approval option.

For...	Description/Action
A user's manager	Click 1 in the Manager(s) list. Notifications will be sent to the person designated in Profile as that user's manager.
More than 1 manager	Click 2 in the Manager(s) list. Notifications will be sent to the person designated in Profile as that user's manager and then the manager's manager. Both approvals are sent simultaneously and the trip will not be ticketed until both managers have approved it.

For...	Description/Action
A specific person for all approvals	<ol style="list-style-type: none"> Click Designate Travel Approver. <div data-bbox="794 310 1273 466" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Choose who will handle the approvals:</p> <p><input type="radio"/> Manager <input checked="" type="radio"/> Designate Travel Approver</p> <p><input type="text"/> <input type="button" value="..."/></p> </div> Click the search button. Type the name of the approver. Click Search. In the results, click Select next to the appropriate approver.

- Click **Save** to the right of the **Rule Class** list.

Rules

IMPORTANT!

Before enabling rules, be sure to read and understand these sections of this guide:

- Travel Rules, Rule Actions, and Policy Icons*
- Rules – General Information, Categories, Rule Action Hierarchy, Best Practices, and Tips*

Modify and Enable Existing Rules

▶ **To modify and enable rules:**

- On the **Travel Policy** tab of the **Travel Policy Administration** page, select the desired class from the **Rule Class** list.

The screenshot shows the 'Travel Policy Administration' page. The 'Travel Policy' tab is highlighted with a red circle. Below the tabs, the 'Rule Class' dropdown menu is set to 'Concur'. To the right of the dropdown are buttons for 'Save', 'Clone Rules', and 'Track Changes'.

The page refreshes, showing the rules for the selected class.

2. Next to the desired category (in this case, **Flight**) click **Edit**.

Travel Policy | Policy Violation Reasons | Travelfusion Suppliers | Vendor FoID Admin | Travel V

Rule Class (Edit Classes)

Concur [v] Save Clone Rules Track Changes

Choose who will handle the approvals:
 Manager Designate Travel Approver

1 [v] Manager(s)

Travel Itinerary (Edit)
• No Rules Enabled

Flight (Edit)
• No Rules Enabled

This page appears, listing all currently available rules for the selected category.

Travel Policy | Policy Violation Reasons | Travelfusion Suppliers | Vendor FoID Admin | Travel Vendor Exclusions | Custom Text | Regional Hotel Rates | Travel Alternatives

Rule Class (Edit Classes)

Concur [v] Save Save to Marry ... Cancel Track Changes

Please define your Lowest Logical Fare (LLF):

Refundability: Does Not Matter [v] Has Contract: Does Not Matter [v] Number of Stops: Does Not Matter [v] Time Window: Does Not Matter [v]

Airport: Does Not Matter [v] Include Rail: No [v]

Run Dedicated LLF Shop:

Flight

Require Approval [v] Flight is between airports NYC,JFK,LGA,EWR [v] and [v]

LAX [v] - and - [v]

Marketing airline is in VX [v]

Message when matched: [v] A - Air [v]

Require Approval [v] Marketing airline is in B6 [v]

and

3. On this page:
 - ◆ Select (enable) the check box for the rule you want to enable.
 - ◆ Select a rule action.



For complete details, refer to the *Travel Rules, Rule Actions, and Policy Icons* section of this guide.

- ◆ Specify the other requested information for each rule.

NOTE: HTML is not supported.

- ◆ Click **Save**. You will see the new rule listed for the selected rule class.
4. Click **Save** to the right of the **Rule Class** list.
 5. Repeat for all rules that you want to modify or enable.

Clone (Replace or Copy) Travel Rules Across Rule Classes

There are two ways to update rules across travel classes:

- **Save to Many:** Copy rules from a *source* travel class and **replace all rules** in one or more *target* travel classes
– **and** –
- **Clone Rules:** Copy one or more rules from a *source* travel class to **add** them to one or more *target* travel classes

SAVE TO MANY (REPLACE RULES)

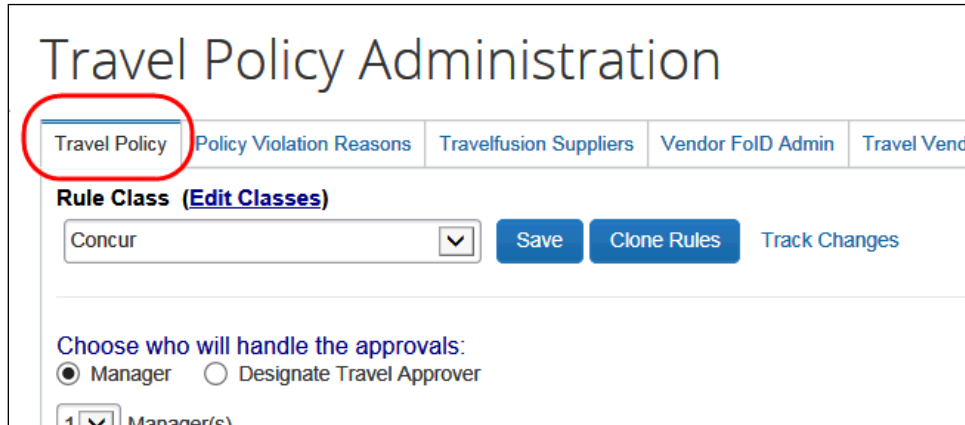
With this process, you can copy rules from a *source* travel class and **replace all rules** in one or more *target* travel classes. This process would typically apply to new sites or updating all travel policy rules – allowing for clean-up and consistency among travel classes.

Note the following:

- You are **replacing** rules. For example, assume that travel class A has five car rules and travel class B has ten car rules. With this process, if you copy the five car rules from A to B, the result is that B will contain **only** the five copied car rules – the copied rules exist *in lieu of* B's original rules.
- The rules that you copy from the source can be new or existing; you can create new rules at the same time that you copy.
- You can only copy within one rule group (such as Car or Hotel) at one time.

► **To replace rules across travel classes:**

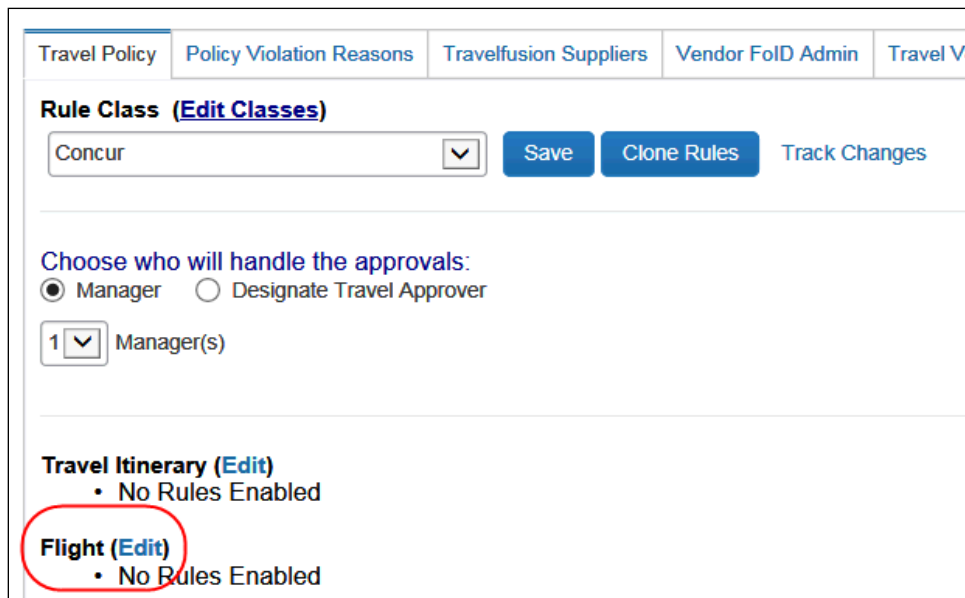
1. On the **Travel Policy** tab of the **Travel Policy Administration** page, select the desired class from the **Rule Class** list.



The screenshot shows the 'Travel Policy Administration' page. The 'Travel Policy' tab is highlighted with a red circle. Below the tabs, the 'Rule Class' dropdown menu is set to 'Concur'. There are buttons for 'Save', 'Clone Rules', and 'Track Changes'. Below this, there is a section for 'Choose who will handle the approvals:' with radio buttons for 'Manager' (selected) and 'Designate Travel Approver'. A dropdown menu shows '1' and 'Manager(s)'.

The page refreshes, showing the rules for the selected class.

2. Next to the desired category (in this case, **Flight**) click **Edit**.



The screenshot shows the 'Travel Policy Administration' page with the 'Travel Policy' tab selected. The 'Rule Class' dropdown menu is set to 'Concur'. Below this, there is a section for 'Choose who will handle the approvals:' with radio buttons for 'Manager' (selected) and 'Designate Travel Approver'. A dropdown menu shows '1' and 'Manager(s)'. Below this, there is a section for 'Travel Itinerary (Edit)' with a bullet point 'No Rules Enabled'. The 'Flight (Edit)' link is highlighted with a red circle, and it also has a bullet point 'No Rules Enabled'.

3. Make any desired changes to the rules, as described in the *Modify and Enable Existing Rules* section of this guide.

- When ready, click **Save to Many**. This will prompt you with a list of destination travel classes.

NOTE: The current travel class is implied. **Your changes apply to both the current travel class and the selected travel classes.** In effect, for any rules you just created, this action saves to the current class and copies to the target class.

- Click the desired travel classes.

Travel Class Name	Travel Config	Property Config
<input checked="" type="checkbox"/> Executive Travel Class	CommaSavvy	Default Configuration
<input type="checkbox"/> Executive Travel Class_Copy1	CommaSavvy	Default Configuration

- Click **Save**.

NOTE: Remember, this action **replaces all rules** in this rule group for the target class.

CLONE RULES (COPY RULES)

With this process, you can copy one or more rules from a *source* travel class to add them to one or more *target* travel classes.

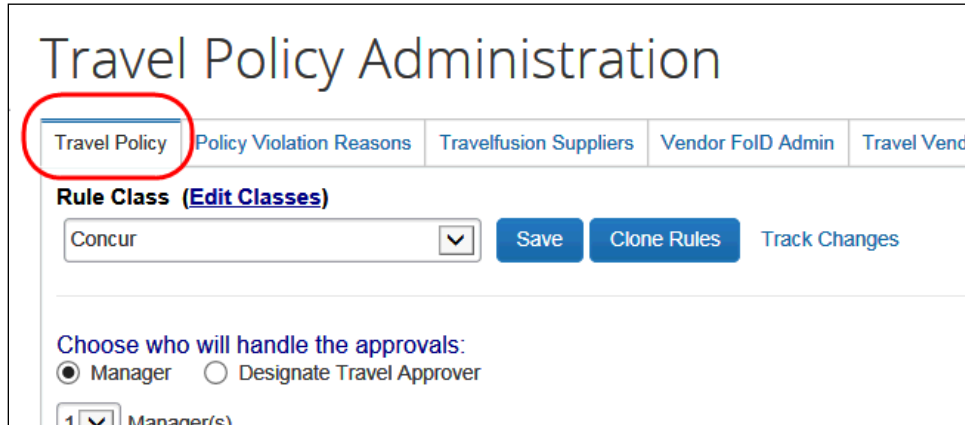
Note the following:

- You are **not** replacing rules. For example, assume that travel class A has five car rules and travel class B has ten car rules. With this process, if you copy the five car rules from A to B, the result is that B will contain fifteen car rules – the copied rules exist *in addition to* B's original rules.

- Please note that if a similar rule appears in the target class, the result could be duplicate or conflicting rules.
- You can copy any or all rules, in any or all rule groups (such as Car or Hotel) at one time.

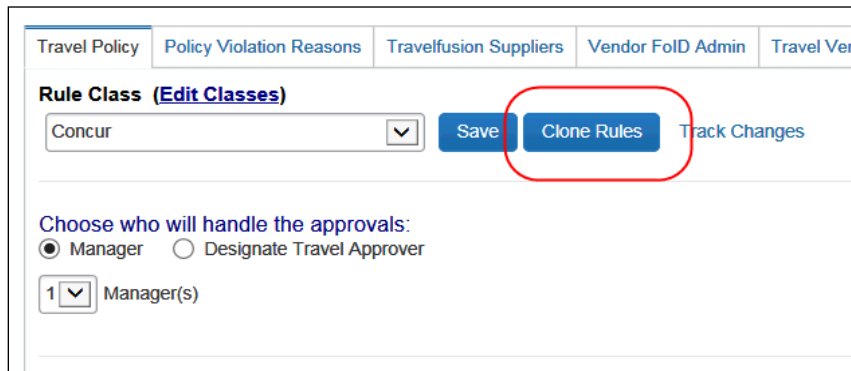
▶ **To copy rules:**

1. On the **Travel Policy** tab of the **Travel Policy Administration** page, select the desired class from the **Rule Class** list.



The page refreshes, showing the rules for the selected class.

2. Click **Clone Rules**. All rules for that class appear on the page.



3. Click all rules you want to copy.

Travel Policy | Policy Violation Reasons | Travelfusion Suppliers | Vendor FoD Admin | Travel Vendor Exclusions | Custom Text | Regional Hotel Rates | Travel Alternatives

Rule Class ([Edit Classes](#))
 Concur [v] Track Changes

Choose who will handle the approvals:
 Manager Designate Travel Approver
 1 [v] Manager(s)

Select the rules you want to clone then click the Apply button. You will be prompted with a list of Travel Classes for which you want to clone the selected rules.
 Note: All rules selected will be added to the travel classes you select.

Check All Check None **Apply** Cancel

Travel Itinerary
 Trip duration >= 1 days and Itinerary has no hotel segments - Log For Reports

Flight
 Air Fare is greater than the least cost logical airfare plus 50 dollars - Log For Reports
 Marketing airline is in Eurostar - Show, but Do Not Allow
 Any flight is in country Cuba - Hide Results

4. Click **Apply**. Travel provides a list of destination travel classes to select.
5. Click the travel classes to which you want to copy these rules.

Select Travel Classes

Company: CommaSavvy
 Select the Travel Classes below you wish to apply changes to.

Check All Check None **Save** Cancel

Warning: Applying these changes to rule classes will replace all rules in this rule group in those classes with the values you have entered for this class.

Travel Class Name	Travel Config	Property Config
<input checked="" type="checkbox"/> Executive Travel Class	CommaSavvy	Default Configuration
<input type="checkbox"/> Executive Travel Class_Copy1	CommaSavvy	Default Configuration

6. Click **Save**. The selected rules copy to the target class.

Use Travel Rule Builder

If the rule is not already available (as described in the *Modify and Enable Existing Rules* section of this guide), use the Travel Rule Builder to create any number of new travel rules.

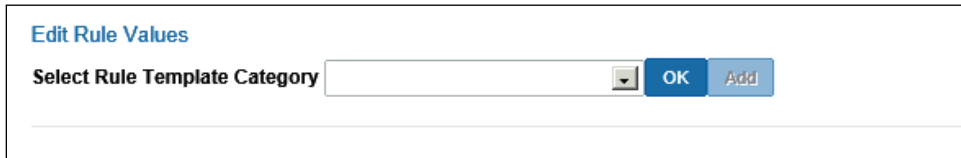
Note the following:

- **IMPORTANT:** Before you create a new rule, **always** check the **Travel Policy** tab to make sure the rule does not currently exist (and is just not yet enabled).
- After you create a rule, you must manually enable it; it is not enabled by default. All rules you create using Travel Rule Builder are available to all travel classes in a company, so you would enable the rule **only** for the desired travel class.

CREATE A NEW RULE

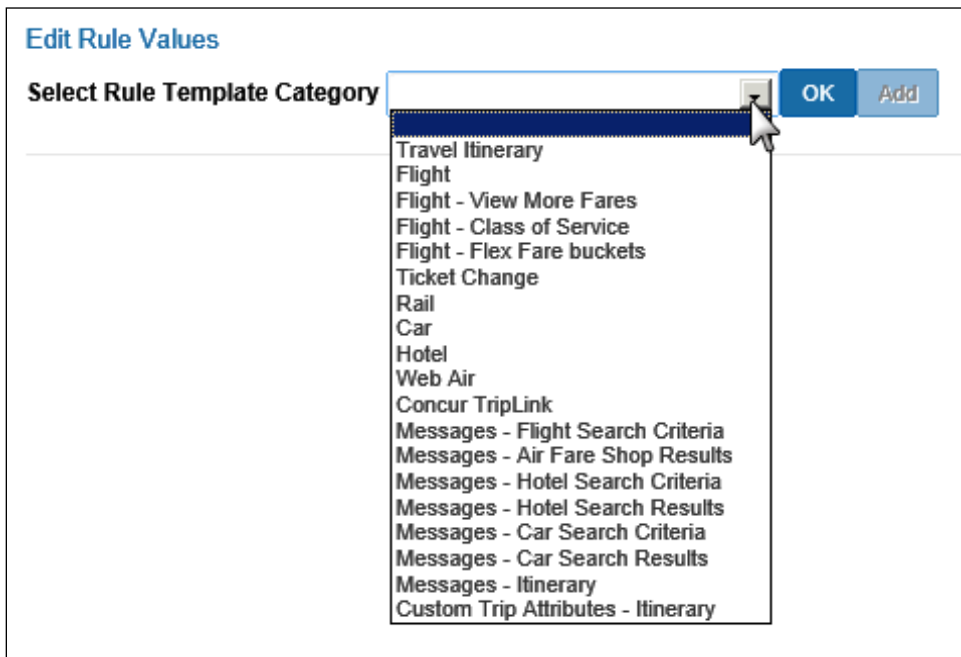
► *To create a rule:*

1. In the **Travel Administration** section of the left menu, click **Travel Rule Builder**. This page appears.



The screenshot shows the 'Edit Rule Values' page. At the top, there is a blue link 'Edit Rule Values'. Below it, the text 'Select Rule Template Category' is followed by a dropdown menu. To the right of the dropdown are two buttons: 'OK' and 'Add'.

2. In the **Rule Template Category** list, click the category for the new rule and click **OK**.



The screenshot shows the 'Edit Rule Values' page with the 'Select Rule Template Category' dropdown menu open. The dropdown list contains the following items: Travel Itinerary, Flight, Flight - View More Fares, Flight - Class of Service, Flight - Flex Fare buckets, Ticket Change, Rail, Car, Hotel, Web Air, Concur TripLink, Messages - Flight Search Criteria, Messages - Air Fare Shop Results, Messages - Hotel Search Criteria, Messages - Hotel Search Results, Messages - Car Search Criteria, Messages - Car Search Results, Messages - Itinerary, and Custom Trip Attributes - Itinerary. A mouse cursor is pointing at the 'OK' button.



For information about using the "messages" options, refer to the *Configurable Message Boards Travel Service Guide*.

A list appears, showing the rules that already exist for this category.

Edit Rule Values				
Select Rule Template Category		Travel Itinerary	OK	Add
	Rule Name	Violation Code	Last Modified Date	Last Modified By
Edit Copy Delete	days advance	109	7/31/2007 3:26:03 PM	Bear, Vernon
Edit Copy Delete	Car Hotel		12/3/2013 1:45:45 PM	Never, Katie
Edit Copy Delete	Rail violation	ZZ	12/3/2013 1:45:49 PM	Never, Katie
Edit Copy Delete	Heidi		12/3/2013 1:45:50 PM	Never, Katie
Edit Copy Delete	testtest1	123	12/3/2013 1:45:50 PM	Never, Katie
Edit Copy Delete	No Hotel	170	1/22/2008 7:49:56 PM	Bear, Vernon

3. Click **Add** to create a new rule for this category. This page appears.

Rule Name	Violation Code
<input checked="" type="radio"/> All of the checked conditions are true <input type="radio"/> Any of the checked conditions are true	
<input type="checkbox"/> * All trips <input type="checkbox"/> Itinerary booked [condition] [DaysAdvance] days in advance <input type="checkbox"/> Trip duration [condition] [DaysLong] days <input type="checkbox"/> Itinerary has air segments <input type="checkbox"/> Itinerary has air segments from carrier(s) [CarrierList] <input type="checkbox"/> Itinerary has no air segments from carrier(s) [CarrierList] <input type="checkbox"/> Itinerary has no air segments <input type="checkbox"/> Itinerary has hotel segments <input type="checkbox"/> Itinerary has no hotel segments <input type="checkbox"/> Itinerary has ground segments <input type="checkbox"/> Itinerary has no ground segments <input type="checkbox"/> Itinerary has car segments <input type="checkbox"/> Itinerary has no car segments <input type="checkbox"/> Trip booked between [DayOfWeek1] at [Time1] and [DayOfWeek2] at [Time2] <input type="checkbox"/> Trip not booked between [DayOfWeek1] at [Time1] and [DayOfWeek2] at [Time2] <input type="checkbox"/> Total Itinerary cost is [condition] [currency][money] Allowed Itinerary Cost	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

4. Complete the following fields.

Field	Description/Action
Rule Name	Enter a name for the rule.
(Any / All)	Choose an option to determine how the selected conditions are evaluated. <ul style="list-style-type: none"> Click All of the checked conditions are true if users must meet all selected conditions of the rule. Click Any of the checked conditions are true if users must meet one or more of the selected condition for the rule.
(conditions)	Click the conditions that apply to this rule.

5. Click **Save**. The new rule is now available to be enabled, as described in the *Modify and Enable Existing Rules* section of this guide.

EDIT A RULE

▶ *To edit a rule:*

1. In the **Travel Administration** section of the left menu, click **Travel Rule Builder**.
2. In the **Rule Template Category** list, click the category for the new rule and click **OK**. A list appears, showing the rules that already exist for this category.
3. Click **Edit** for the rule you want to edit.
4. Make the desired changes. (The fields are described in the section above about adding a rule.)
5. Click **Save**.

COPY A RULE

Sometimes, it is easier to copy and rule and then edit the copy that to create a new rule.

▶ *To copy a rule:*

1. In the **Travel Administration** section of the left menu, click **Travel Rule Builder**.
2. In the **Rule Template Category** list, click the category for the new rule and click **OK**. A list appears, showing the rules that already exist for this category.
3. Click **Copy** for the rule you want to copy. The copy appears.
4. Make the desired changes, including the rule name. (The fields are described in the section above about adding a rule.)
5. Click **Save**.

DELETE A RULE

▶ *To delete a rule:*

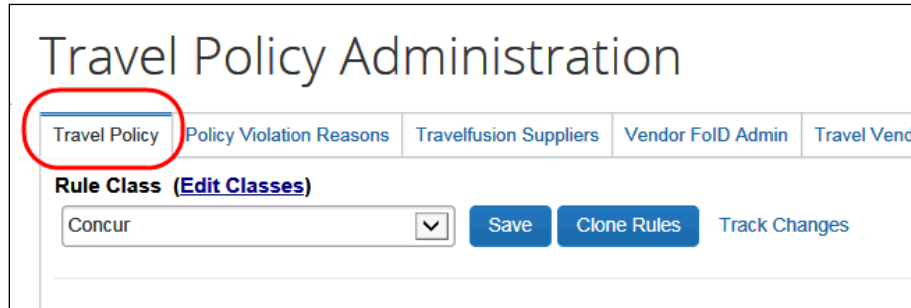
1. In the **Travel Administration** section of the left menu, click **Travel Rule Builder**.
2. In the **Rule Template Category** list, click the category for the new rule and click **OK**. A list appears, showing the rules that already exist for this category.
3. Click **Delete** for the rule you want to remove.

Use Track Changes

Use **Track Changes** to see the last 20 changes made to travel rules for any given travel policy associated to a site. You can use this information to see when a rule was changed and by whom.

► **To use Track Changes:**

On the **Travel Policy** tab of the **Travel Policy Administration** page, click **Track Changes**.



The following information appears.

Travel Policy History			
This section tracks the 20 most recent changes to a given travel policy.			
Action	Details	By Whom	Date/Time Stamps
Added	Air Fare is > 25.00 <i>Require Approval</i>	cc@CommaSavvy.com	11/18/2016 7:13:00 PM
Modified	Hotel Rate is >= the government hotel level per diem rate + 1 dollars <i>Log For Reports</i> To Hotel Rate is >= the government hotel level per diem rate + 1 dollars <i>Require Approval</i>	mlore@outtask.com	12/9/2015 4:10:00 AM
Modified	Hotel Rate is >= the government hotel level per diem rate + 1 dollars <i>Require Approval</i> To Hotel Rate is >= the government hotel level per diem rate + 1 dollars <i>Log For Reports</i>	mlore@outtask.com	12/9/2015 3:22:00 AM
Modified	Hotel Rate is = the government hotel level per diem rate + 1 dollars <i>Require Approval</i> To Hotel Rate is >= the government hotel level per diem rate + 1 dollars <i>Require Approval</i>	mlore@outtask.com	12/8/2015 10:30:00 AM
Added	Hotel Rate is > the government location based per diem rate + 0 dollars <i>Require Approval</i>	mlore@outtask.com	12/8/2015 5:31:00 AM

Column	Description/Action
Action	Whether a rule was added, removed, or modified
Details	Which rule was added or deleted, or the values that were modified
By Whom	Who made the change (Login ID)
Date/Time Stamp	When the change occurred

Policy Violation Reasons

Use the **Policy Violation Reasons** tab to create the list of reasons available to the user.

⚠ IMPORTANT: Violation reasons *must* be configured for travel rules. If there are no violation reasons configured for a given rule, users/arrangers will not be able to finalize reservations that violate those rules.

Add a New Policy Violation Reason

▶ **To add a new violation reason:**

1. On the **Policy Violations Reasons** tab of the **Travel Policy Administration** page, select the desired configuration. The page refreshes, showing the policy violation reasons for the selected configuration.

	Code	Description	Type
Edit Deactivate	SF	Spouse / Family travel	G - General
Edit Deactivate	YL	Accepted lowest possible fare	G - General
Edit Deactivate	UP	Declined lowest fare due to first / business class upgrade	A - Air
Edit Deactivate	YB	Declined lower fare for first / business class seat	A - Air

2. Click **Add New Policy Violation Reason**. The top row becomes editable.

Code: Description: Type:

Insert into:

- This travel configuration only
- All travel configurations
- This configuration and the following travel configurations

Concur OTE and Void Test
sabre profiles clone test
sabre profiles clone test 2

[Save](#) [Cancel](#)

- Complete the following fields.

Field	Description/Action
Code	Enter a code for the violation reason. NOTE: Codes determine the order of the reasons as they appear to users. Travel sorts reasons alphabetically based on the code. It is also helpful to use codes to group related reasons.
Description	Enter the description for the violation reason. This description will appear in the list for users.
Type	Select the type of policy rule with which the violation will be associated. You can create a new type by selecting add new . A text field appears. Enter the name. The new type now appears on the list of types.
Insert into	This option appears with multiple configurations. Click the appropriate option.

- Click **Save**. The new policy violation reason appears in the list.

Edit Policy Violation Reasons

▶ ***To edit violation reason:***

- On the **Policy Violations Reasons** tab of the **Travel Policy Administration** page, click **Edit** next to the desired policy violation reason.
- Enter the required changes, as described in *Add a New Policy Violation Reason*.
- Click **Save**.

Deactivate or Activate a Policy Violation Reason

▶ ***To deactivate/activate a violation reason:***

On the **Policy Violations Reasons** tab of the **Travel Policy Administration** page:

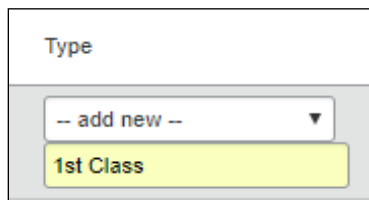
- Click **Deactivate** next to the policy violation reason to deactivate.
- Click **Show Deactivated Reasons** to view deactivated policy violation reasons.
- Click **Activate** to reactive a policy violation reason.

Create a Custom Violation Reasons Type

► To set up a custom violation reason:

1. Ensure that the **Allow Multiple Violation Reason Codes** check box is selected (enabled) on the travel configuration page.
2. Create the new violation reason as described in the *Add a New Policy Violation Reason* section in this guide.

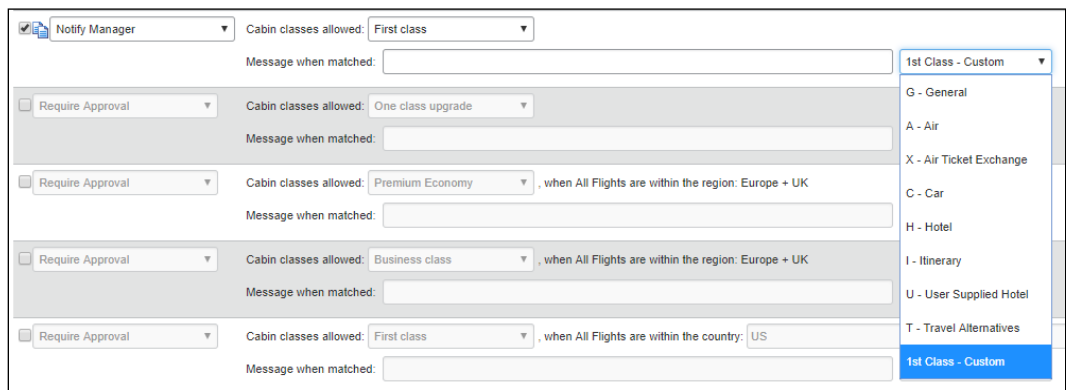
Create a new violation reason type – for the desired travel configuration – by clicking *add new* in **Type** list. Enter a name of your choice.



The image shows a dropdown menu titled "Type". The menu is open, showing a list of options. The top option is "-- add new --" with a downward arrow. Below it, "1st Class" is selected and highlighted in yellow.

To give users the choice of different reasons under the custom type you just created, add additional reasons; the custom type you created will now be available as an option in **Type** list.

3. On the **Travel Policy** tab, select the appropriate rule class from the **Rule Class** list. The users in the rule class will see this new type in the violation reasons presented to them.
4. Click **Edit** for the desired rule group (such as Travel Itinerary, Flight, etc.)
5. Locate the applicable rule(s) and assign the custom violation reason type.



The image shows a screenshot of the Travel Policy configuration page. It displays a list of rule classes with columns for "Require Approval", "Cabin classes allowed", and "Message when matched". The "Cabin classes allowed" column shows various options like "First class", "One class upgrade", "Premium Economy", "Business class", and "First class". The "Message when matched" column has text boxes for each rule class. On the right side, there is a dropdown menu for "1st Class - Custom" which is expanded to show a list of options: "G - General", "A - Air", "X - Air Ticket Exchange", "C - Car", "H - Hotel", "I - Itinerary", "U - User Supplied Hotel", "T - Travel Alternatives", and "1st Class - Custom" (which is highlighted in blue).

Section 14: Configuration – Standard Travel

Overview

Travel managers and/or agency fulfillment partners have a great deal of flexibility within Concur Travel when it comes to travel policy management.

This Section

This section provides details about travel policy activities:

- **Policy:** Create, edit, and delete a travel policy
- **Travel Features:** Enable *travel features*, which include allowing users to book ground transportation (limos) or user-supplied hotels, etc.
- **Approvals:** Assign an approver/manager
- **Rules:**
 - ◆ Enable and modify existing rules
 - ◆ Create new rules
- **Violation Reasons:** Create and modify the policy violation codes

Benchmark Lowest Airfare

Benchmark Lowest Airfare is part of the travel policy and is closely associated with rules. It is mentioned in this guide but is ***not covered in detail***.



For complete details, refer to the *Lowest Logical Fare (LLF) / Benchmark Lowest Airfare Travel Service Guide*.

Policy

Edit a Travel Policy Name

▶ ***To edit a policy name:***

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Travel Policy** setup step.

TRAVEL POLICY

This step allows you to view, add, and rename travel policies for your site.

- 1 **Travel Policy**
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields

+ Are you sure travel policies exist for your site? Two travel policies are automatically created for each configuration. These can be renamed by clicking Edit to the left of each option. To add additional policies, click on the Add New link.

[\[+\] Add New Travel Policy](#)

	Travel Policy Name	Travel Configuration
Edit Delete	Travel Policy (US) Normal	sjlSept15 (US)
Edit Delete	Travel Policy (US) VIP	sjlSept15 (US)

3. Click **Edit** to the left of the desired policy.

The name becomes editable.

[\[+\] Add New Travel Policy](#)

Travel Policy Name

[Edit](#) | [Delete](#) Travel Policy (US) Normal

Travel Policy (US) VIF [Save](#) [Cancel](#)

4. Make the desired change.
5. Click **Save**.

Create a New Policy

You can create an unlimited number of policies for your company.

► **To create a policy:**

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Travel Policy** setup step.

TRAVEL POLICY

This step allows you to view, add, and rename travel policies for your site.

- 1 **Travel Policy**
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields

+ Are you sure travel policies exist for your site? Two travel policies are automatically created for each configuration. These can be renamed by clicking Edit to the left of each option. To add additional policies, click on the Add New link.

[\[+\] Add New Travel Policy](#)

	Travel Policy Name	Travel Configuration
Edit Delete	Travel Policy (US) Normal	StandardSept22 (US)
Edit Delete	Travel Policy (US) VIP	StandardSept22 (US)

3. Click the **Add New Travel Policy** link. A new row appears at the bottom of the grid.

Travel Policy Name		Travel Configuration
Edit Delete	Travel Policy (US) Normal	sj Sept15 (US)
Edit Delete	Travel Policy (US) VIP	sj Sept15 (US)
	Travel Policy Name <input type="text"/>	Travel Configuration <input type="text" value="sj Sept15 (US)"/> Save Cancel

4. Enter a name.
5. Select the desired travel configuration/country.
6. Click **Save**. The screen refreshes to show the new travel policy.

Delete a Policy

You can delete a policy if there are no users assigned to the policy. If there are users assigned, you must assign them to another policy before deleting.

▶ To delete a travel policy:

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Travel Policy** setup step.

TRAVEL POLICY L

This step allows you to view, add, and rename travel policies for your site.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields

i Are you sure travel policies exist for your site? Two travel policies are automatically created for each configuration. These can be renamed by clicking Edit to the left of each option. To add additional policies, click on the Add New link.

[+] Add New Travel Policy

Travel Policy Name		Travel Configuration
Edit Delete	Travel Policy (US) Normal	StandardSept22 (US)
Edit Delete	Travel Policy (US) VIP	StandardSept22 (US)

3. Click the **Delete** link to the left of the desired policy.
4. Then:
 - ◆ If there are no users associated with the policy, a confirmation message appears. Click **Yes**.

Delete Travel Policy

Are you sure you want to delete this travel policy?

Yes
Cancel

- ◆ If there are users associated to that policy, you must transfer those users to another policy. Select a new policy and click **Delete**.

Delete Travel Policy

There are still users associated with this travel policy. Please choose a new travel policy for these users.

Delete
Cancel

The page updates after the deletion is confirmed.

	Travel Policy Name	Travel Configuration
Edit Delete	Travel Policy (US) Normal	sj Sept15 (US)
Edit Delete	Travel Policy (US) VIP	sj Sept15 (US)

Travel Features

Travel features include allowing users to book ground transportation (limos) or user-supplied hotels, etc.

Enable Travel Features

► **To enable travel features:**

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Travel Rules** setup step.
3. Click the **Travel Features** tab.

4. Select the desired policy.
5. Modify the settings as needed. Help text is available to explain nuances.

Setting	Default	Description/Action
Enable Self-Registration	Disabled	Select (enable) this check box to allow users to create their own login. Refer to the <i>Self-Registration Travel Service Guide</i> .
Enable Ground Bookings	Disabled	Select (enable) this check box to allow ground transportation. Refer to the <i>Ground Content Suppliers Travel Service Guide</i> .
Enable Manual Hotels	Disabled	Select (enable) this check box to allow users to supply hotel information they booked outside Concur Travel, for example, a hotel room block. Refer to the <i>User Supplied Hotels Travel Service Guide</i> .

Setting	Default	Description/Action
TripIt Privacy	Default to Private	Select one of these: <ul style="list-style-type: none"> • Default to Shared • Default to Private • Always Private

6. Click **Save**.

Approvals

Assign an Approver/Manager

Before defining the approval workflow, refer to *Standard Travel* in the *Approval Workflow Options* section of this guide for a complete understanding of how it works.

► **To assign an approver or manager:**

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Travel Rules** setup step.
3. Click the **Manager Notification** tab.

4. Select the desired policy.
5. Click the appropriate radio button to choose whether:
 - ◆ Each user is assigned the manager/approver that appears in the user's profile.
 - or –
 - ◆ There is one manager/approver for the entire policy – if so, click **Select Manager** to assign the approver.
6. Click **Save**.

Rules

IMPORTANT!

Before enabling rules, be sure to read and understand these sections of this guide:

- *Travel Rules, Rule Actions, and Policy Icons*
- *Rules – General Information, Categories, Rule Action Hierarchy, Best Practices, and Tips*

Enable and Modify Existing Rules

There are several pre-defined travel rules. You can modify and enable these pre-defined rules:

Travel Itinerary
All trips
Trip duration <select from list> <blank> days and Itinerary has air segments and Itinerary has no hotel segments
Flight
Air Fare is <select from list> \$<blank>
Air Fare is <select from list> the least cost logical airfare plus \$<blank>
Carrier is not preferred
Flights are international (Definition: For flights crossing a border)
Flights are inter-regional (Definition: For flights crossing from one continent to another)
More than <blank> passengers on a flight
Flight Class of Service
Business class allowed when Flight distance is <select from list> <blank> <miles/km>
First class allowed when Flight distance <select from list> <blank> <miles/km>
Premium Economy allowed when Flight distance <select from list> <blank> <miles/km>
Cabin classes allowed: <select from list> when Marketing airline is in <blank>
Flex Faring
Fare bucket is in: <blank>
Fare bucket is not in: <blank>
Marketing airline is in: <blank> and Fare bucket is in: <blank>
Carrier is not preferred
Airfare is <select from list> \$<blank>
Airfare is <select from list> the least logical airfare plus <amount> <currency>

Car
Car rate <select from list> \$<blank> per day
Car vendor is not preferred
Car size exceeds company preferred size of <select from list>
Hotel
Hotel property is not preferred and Hotel search results contain preferred properties
Hotel rate is <select from list> \$<blank>
Hotel Rate is <select from list> the lowest rate at the hotel plus <blank> <select from list>
Concur TripLink (only if TripLink is enabled)
All trips
Car supplier is not preferred
Car rate is <select from list> \$<blank> per day
Hotel chain is not preferred
Hotel property is not preferred
Hotel rate is <select from the list> \$<blank>
Air carrier is not preferred
Web Air
Travelfusion Airfare is greater than the least cost reservation system option on the same carrier/route <plus/minus> <#> <currency>
Ticket Change
Air exchange total cost (fare plus penalties) is <operator> \$ <#>
Fare difference is <operator> \$ <#>

► **To use the pre-defined travel rules:**

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Travel Rules** setup step.
3. On the **Travel Rules** tab, select the desired policy.

TRAVEL RULES

This step allows you to define your travel policies, determine the benchmark lowest fare and assign trip approvers.

- Travel Policy
- Travel Rules**
- Configurable Messaging
- Custom Text
- Organization Units
- Policy Violation Codes
- Company Locations
- Form of Payment
- Discounts and Travel Content
- Custom Trip Fields
- Custom Profile Fields
- Unused Tickets
- Site Customization
- Manage Users
- Invite Users

Travel Rules | Benchmark Fare | Manager Notification | Search Options | Travel Features

Please select the travel policy you want to update. Be sure to save your changes before moving on.

Travel Policy (US) Normal

Travel Rules

i To enable a rule, choose Log for Reports, Notify Manager, Passive Approval or Require Approval. Please note: Passive Approval and Require Approval will prevent instant purchase fares from being booked. If you have enabled a rule, you can change the values associated with it. Be sure to save your changes before moving on to the next step.

Travel Itinerary

Disabled All Trips

- All rules are disabled by default. To enable, choose one of the rule action options from the dropdown.

Travel Itinerary

Disabled All Trips

Log for reports

Notify Manager

Passive Approval

Require Approval


Disabled

Trip Duration greater than or equal to

hotel segments

Disabled Air Fare is greater than or equal to

Disabled Air Fare is greater than or equal to

 For definitions of the actions, refer to the *Travel Rules, Rule Actions, and Policy Icons* section of this guide

The remaining fields then become active.

- Select from the lists or fill in the fields as applicable.
- Click **Save**.

Define Custom Rules

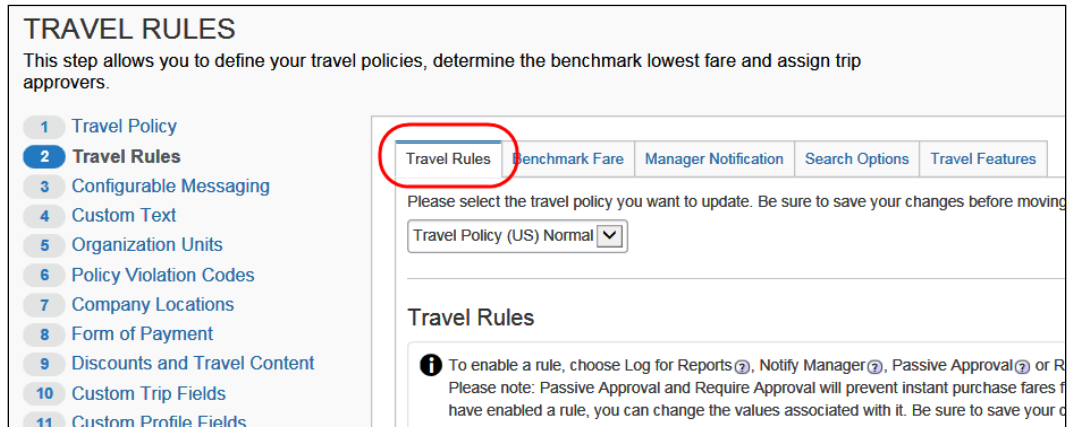
If the pre-defined rules do not provide the options you need, you can create custom rules. In addition, you can create the same rule more than once but with different default values. For example, US Travel policy says that property X requires approval; Canada Travel policy can have the same rule but highlight a different property.

CREATE A CUSTOM RULE (TRAVEL RULE BUILDER)

When you create a custom rule, it becomes available – but disabled – for **all** policies. After you create the rule, you must manually enable the rule for one or more policies.

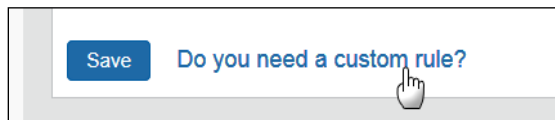
▶ **To create a custom rule:**

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Travel Rules** setup step.



The screenshot shows the 'TRAVEL RULES' section of the Travel Setup Wizard. The title is 'TRAVEL RULES' and the subtitle is 'This step allows you to define your travel policies, determine the benchmark lowest fare and assign trip approvers.' On the left, there is a list of steps: 1 Travel Policy, 2 Travel Rules (highlighted), 3 Configurable Messaging, 4 Custom Text, 5 Organization Units, 6 Policy Violation Codes, 7 Company Locations, 8 Form of Payment, 9 Discounts and Travel Content, 10 Custom Trip Fields, and 11 Custom Profile Fields. The main content area has a tabbed interface with 'Travel Rules' selected and circled in red. Other tabs include 'Benchmark Fare', 'Manager Notification', 'Search Options', and 'Travel Features'. Below the tabs, there is a dropdown menu for 'Travel Policy (US) Normal'. A message below the dropdown says 'Please select the travel policy you want to update. Be sure to save your changes before moving on.' Below that, there is a section titled 'Travel Rules' with an information icon and text: 'To enable a rule, choose Log for Reports, Notify Manager, Passive Approval or Require Approval. Please note: Passive Approval and Require Approval will prevent instant purchase fares if you have enabled a rule, you can change the values associated with it. Be sure to save your changes.' The bottom of the screen shows a 'Save' button and a link 'Do you need a custom rule?' with a hand cursor pointing to it.

3. Scroll to the bottom of the page and click **Do you need a custom rule?**



The screenshot shows the bottom of the Travel Rule Builder window. It features a 'Save' button on the left and a link 'Do you need a custom rule?' on the right. A hand cursor is pointing to the link.

The **Travel Rule Builder** window appears.

Travel Rule Builder

Select rule category:

All of the checked conditions are true Any of the checked conditions are true

You may provide default values where you wish. Once you click Save, you must still enable the rule to become effective.

Default Value

4. Select the desired rule category from the dropdown list.

NOTE: Certain categories will be available based on the features enabled. For example, Ticket Change and TripLink appear in the dropdown only if they are enabled for the site.

Select rule category:

Travel Itinerary

Flight

Flight - View More Fares

Flight - Class of Service

Flight - Flex Fare buckets

Rail

Car

Hotel

Web Air

Once you select the category, the screen refreshes, showing all of the available options.

Travel Rule Builder

Select rule category:
Flight

All of the checked conditions are true
 Any of the checked conditions are true

Flight Number [condition] [FlightNumber]
 Flight Number is in the list of [FlightNumber]
 Air Fare is [condition] [currency][money]
 Air Fare is [condition] the Calculated Price-to-Beat
 Air Fare is [condition] the least cost logical airfare plus [difference] [?] [currencyOrPercent]
 Air Fare is within [difference] to [difference2] [?] [currencyOrPercent] of the least cost logical airfare
 Air Fare is [difference] [currencyOrPercent] [condition] the least cost fewest stops fare
 Air Fare is [condition] the least cost [numStops]-stop fare [plusMinus] [difference]
 Air Base Fare is [condition] [currency][money]
 One or more fare basis codes contain [FareBasisText]

You may provide default values where you wish. Once you click Save, you must still enable the rule to become effective.

Default Value

5. Choose whether all conditions are true or any. The default of **All of the checked conditions are true** is selected.
6. Select the rule parts you wish to combine by checking the box to the left. This will update the default values section below.
7. You can populate the default value here or add it when you enable the rule.
8. Click **Save**. The **Travel Rules** tab appears.
9. At this point, the rule exists but has not been enabled. Custom rules will appear for **all** travel policies. Once created, you can then enable the new custom rule for one or more policies. Enable the rule, as described in *Enable and Modify Existing Rules*.

DELETE A CUSTOM RULE

If you delete a custom rule, it is deleted from all travel policies. Verify the other travel policies to be sure it is not used elsewhere before deleting. Otherwise, consider disabling the rule for the desired class.

▶ **To delete a custom rule:**

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Travel Rules** setup step.
3. On the **Travel Rules** tab, select the desired policy.

TRAVEL RULES

This step allows you to define your travel policies, determine the benchmark lowest fare and assign trip approvers.

- 1 Travel Policy
- 2 Travel Rules**
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization
- 14 Manage Users
- 15 Invite Users

Travel Rules | Benchmark Fare | Manager Notification | Search Options | Travel Features

Please select the travel policy you want to update. Be sure to save your changes before moving on.

Travel Policy (US) Normal

Travel Rules

i To enable a rule, choose Log for Reports (?), Notify Manager (?), Passive Approval (?) or Require Approval (?). Please note: Passive Approval and Require Approval will prevent instant purchase fares from being booked. If you have enabled a rule, you can change the values associated with it. Be sure to save your changes before moving on to the next step.

Travel Itinerary

Disabled | All Trips

4. Click **Delete** to the right of the desired rule. A confirmation message appears.

Disabled | more than 4 passengers on a night

Require Approval | Any leg departure City is

ORD [Delete](#)

Flight Class of S **Message from webpage**

Not allow | Not allow | Not allow | Not allow

? Are you sure you want to remove this rule template?
This will remove all places this rule is used.

OK Cancel

5. Click **OK**.

Violation Reasons

Use the **Policy Violation Codes** step to create reasons for users to choose from when they violate established travel policies. These are tracked with reporting for each trip/rule violated and can also be written to the PNR for TMC back-office reporting.

You can use the existing codes "as is," edit the existing codes, enter new codes manually, or import new codes.

⚠ IMPORTANT: Consult with your travel agency before modifying Policy Violation Codes as these are crucial to your TMC back-office reporting.

The existing violation reasons are:

Code	Description	Type
YC	Declined lower fare due to carrier preference	A
YD	Declined lower fare due to airport preference	A
YE	Declined lower fare due to equipment type	A
YR	Declined lowest fare due to penalty or restrictions	A
YT	Declined lowest fare due to flight time preferences	A
YX	Declined lowest fare due to connections or stops	A
CU	Declined lowest rate due to car type	C
CX	Declined lowest rate due to chain preference	C
CY	Declined lowest rate due to customer preference	C
HC	Declined lower hotel rate due to chain preference	H
HL	Declined lower hotel rate due to location	H
HR	Declined lower hotel rate due to customer request	H
HT	Declined lower hotel rate due to room type preference	H
IB	Business Trip	I
IC	Hotel booked directly with property/chain	I
IF	Staying with friends/family	I
IM	Meeting Travel	I
IN	Hotel booked through conference/meeting	I
IP	Personal Travel	I

Add a New Policy Violation Reason Manually

▶ ***To add a new violation reason manually:***

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Policy Violation Codes** setup step.
3. On the **Policy Violation** tab, select the desired policy.

POLICY VIOLATION CODES Learn about this

This step allows you to define out-of-policy violation options. These will display to the user if the user chooses an option that violates your travel policy.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes**
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization

Policy Violations
Import Violations

Please select the travel configuration you want to update.

StandardSept22 (US)

i To add a new violation code, click Add New Policy Violation Reason. To edit an existing violation, click Edit. Click on the Import Violations tab if you want to import violations via a spreadsheet.

Show Deactivated Reasons

[+] Add New Policy Violation Reason

	Violation Code	Violation Description	Violation Type
Edit	YC	Declined lower fare due to carrier preference	A - Air

4. Click **Add New Policy Violation Reason**. The **Policy Violation Reason Detail** window appears.

Policy Violation Reason Detail for Company: sjl0402

Confirm each violation reason code with your fulfillment travel agency. These codes are added to the travel reservation for your agency reporting. Text added to the description field is displayed to the user. Select a type to indicate that the violation reason applies to air, car, hotel, itinerary or all rule violations. Codes defined as "general" apply to all violations. Be sure to click Save before moving on to the next step.

Code	Description	Type
<input type="text"/>	<input type="text"/>	G - General <input type="button" value="v"/>

5. Make the appropriate choices as described in the following table.

Field	Description/Action
Code	Enter a code for the violation reason. NOTE: Codes determine the order of the reasons as they appear to users. Concur Travel sorts reasons alphabetically based on the code. It is also helpful to use codes to group related reasons.
Description	Enter the description for the violation reason. This description will appear to users.
Type	Select the type of policy rule that is associated with the violation.

6. Click **Save**. The new policy violation reason appears in the list.

Edit Policy Violation Reasons Manually

► To edit violation reason manually:

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Policy Violation Codes** setup step.

3. On the **Policy Violation** tab, select the desired policy.

POLICY VIOLATION CODES [Learn about this](#)

This step allows you to define out-of-policy violation options. These will display to the user if the user chooses an option that violates your travel policy.

1 Travel Policy
2 Travel Rules
3 Configurable Messaging
4 Custom Text
5 Organization Units
6 Policy Violation Codes
7 Company Locations
8 Form of Payment
9 Discounts and Travel Content
10 Custom Trip Fields
11 Custom Profile Fields
12 Unused Tickets
13 Site Customization

Policy Violations | Import Violations

Please select the travel configuration you want to update.
StandardSept22 (US) ▼

i To add a new violation code, click Add New Policy Violation Reason. To edit an existing violation, click Edit. Click on the Import Violations tab if you want to import violations via a spreadsheet.

[+] Add New Policy Violation Reason Show Deactivated Reasons ?

Violation Code	Violation Description	Violation Type
Edit YC	Declined lower fare due to carrier preference	A - Air

4. Click **Edit** for the desired policy violation reason. The **Policy Violation Reason Detail** window appears.

Policy Violation Reason Detail for Company: sjl0402 X

Confirm each violation reason code with your fulfillment travel agency. These codes are added to the travel reservation for your agency reporting. Text added to the description field is displayed to the user. Select a type to indicate that the violation reason applies to air, car, hotel, itinerary or all rule violations. Codes defined as "general" apply to all violations. To deactivate a reason, click Deactivate. This will remove the violation reason from your site. Be sure to click Save before moving on to the next step.

Code	Description	Type
YC	Declined lower fare due to carrier preference	A - Air ▼

Save Deactivate Cancel

5. Make the required changes. (The fields are described in the *Adding a New Policy Violation Reason* section above.)

NOTE: If you edit a reason code being used by multiple configurations, you must also indicate whether to save the change to this configuration, multiple configurations, or all configurations.

Code	Description	Type
YC	Declined lower fare due to carrier preference	A - Air ▼

Save changes to:

This travel configuration only
 All travel configurations
 This configuration and the following travel configurations

No Name 29, inc. (GB)
 No Name 29, inc. (CA)

Save Deactivate Cancel

6. Click **Save**.

Deactivate or Activate Policy Violation Reasons Manually

▶ To deactivate a violation reason manually:

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Policy Violation Codes** setup step.
3. On the **Policy Violation** tab, select the desired policy.

POLICY VIOLATION CODES [Learn about this](#)

This step allows you to define out-of-policy violation options. These will display to the user if the user chooses an option that violates your travel policy.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes**
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization

Policy Violations | Import Violations

Please select the travel configuration you want to update.
StandardSept22 (US) ▼

i To add a new violation code, click Add New Policy Violation Reason. To edit an existing violation, click Edit. Click on the Import Violations tab if you want to import violations via a spreadsheet.

[+] Add New Policy Violation Reason Show Deactivated Reasons ⓘ

Violation Code	Violation Description	Violation Type
Edit YC	Declined lower fare due to carrier preference	A - Air

4. Click **Edit** for the desired policy violation reason. The **Policy Violation Reason Detail** window appears.

Policy Violation Reason Detail for Company: sjl0402

Confirm each violation reason code with your fulfillment travel agency. These codes are added to the travel reservation for your agency reporting. Text added to the description field is displayed to the user. Select a type to indicate that the violation reason applies to air, car, hotel, itinerary or all rule violations. Codes defined as "general" apply to all violations. To deactivate a reason, click Deactivate. This will remove the violation reason from your site. Be sure to click Save before moving on to the next step.

Code	Description	Type
YC	Declined lower fare due to carrier preference	A - Air ▼

Save Deactivate Cancel

5. Click **Deactivate**.

▶ To reactivate a deactivated violation reason manually:

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Policy Violation Codes** setup step.
3. On the **Policy Violation** tab, select the desired policy.

POLICY VIOLATION CODES [Learn about this](#)

This step allows you to define out-of-policy violation options. These will display to the user if the user chooses an option that violates your travel policy.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization

Policy Violations

Import Violations

Please select the travel configuration you want to update.

StandardSept22 (US) ▼

i To add a new violation code, click Add New Policy Violation Reason. To edit an existing violation, click Edit. Click on the Import Violations tab if you want to import violations via a spreadsheet.

[+] Add New Policy Violation Reason
 Show Deactivated Reasons ?

	Violation Code	Violation Description	Violation Type
Edit	YC	Declined lower fare due to carrier preference	A - Air

4. Select (enable) the **Show Deactivated Reasons** check box to view deactivated policy violation reasons.

To add a new violation code, click Add New Policy Violation Reason. To edit an existing violation, click Edit. Click on the Import Violations tab if you want to import violations via a spreadsheet.

[+] Add New Policy Violation Reason
 Show Deactivated Reasons ?

	Violation Code	Violation Description	Violation Type
Edit	YD	Declined lower fare due to airport preference	A - Air
Edit	YE	Declined lower fare due to equipment type	A - Air
Edit	YR	Declined lowest fare due to penalty or restrictions	A - Air

The deactivated reasons appear.

5. Click **Edit** for the desired deactivated policy violation reason. The **Policy Violation Reason Detail** window appears.

Policy Violation Reason Detail for Company: sjl0402 [X](#)

Confirm each violation reason code with your fulfillment travel agency. These codes are added to the travel reservation for your agency reporting. Text added to the description field is displayed to the user. Select a type to indicate that the violation reason applies to air, car, hotel, itinerary or all rule violations. Codes defined as "general" apply to all violations. To deactivate a reason, click Deactivate. This will remove the violation reason from your site. Be sure to click Save before moving on to the next step.

Code	Description	Type
YC	Declined lower fare due to carrier preference	A - Air ▼

Activated
Cancel

6. Click **Activated**.

Add, Edit, and Deactivate Policy Violation Reasons Via Import

NOTE: Between 9 AM – 5 PM (your local time), uploads are limited to 5MB or smaller. If you attempt to upload a file that is larger than that, a message appears. You can often reduce file sizes by changing file formats from .csv to Excel. If changing the format is not an option, you can upload larger files after business hours (9 AM – 5 PM your local time).

► **To add, edit, or deactivate violation reasons using the import:**

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Policy Violation Codes** setup step.
3. Click the **Import Violations** tab.

POLICY VIOLATION CODES [Learn about this](#)

This step allows you to define out-of-policy violation options. These will display to the user if the user chooses an option that violates your travel policy.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes**
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization
- 14 Manage Users
- 15 Invite Users

Policy Violations **Import Violations**

i This page allows you to import policy violations from a spreadsheet or data file. Download the sample file, populate the data and save to your computer.

To import a file:

1. Use the Browse button below to select the appropriate file to import. Be sure to note the file type.
2. Click Process File.

Input File

Force Overwrite of Existing Policy Violations ⓘ

Download [Sample CSV File](#)

4. Click **Sample CSV File**.
5. Save the sample file (.xlsx format) to your local drive.
6. Review the information on the **Instructions** tab of the spreadsheet.
7. On the **Policy Violation Reasons** tab of the spreadsheet, enter the desired data. The following fields are required:

Field	Description/Action
Travel Configuration	<p>Enter the exact name of a single configuration to which this should apply.</p> <p>To find this, go to the Travel Policy tab of the Travel Setup Wizard.</p> <p>To apply the policy violation changes to all configurations, enter <all>, including angle brackets.</p>

Field	Description/Action
Policy Violation Code	Enter a code for the violation reason. NOTE: Codes determine the order of the reasons as they appear to users. Concur Travel sorts reasons alphabetically based on the code. It is also helpful to use codes to group related reasons.
Policy Violation Description	Enter the description for the violation reason. This description will appear to users.
Policy Violation Type	Select the type of policy rule that is associated with the violation.
Status	Status signifies whether this policy violation is Active or Inactive. Enter either: <ul style="list-style-type: none"> • 1 will update an existing policy violation, if one exists, or insert one if it does not. • 0 will de-activate the policy violation.

8. Save your changes.
9. Click **Browse/Choose File** (depending on the browser) and locate the updated file.
10. Determine whether you are forcing an overwrite of existing violations (most likely you are).

Input File

Force Overwrite of Existing Policy Violations ?

Check this box if you want to overwrite all existing policy violations. Do not check this box if you want to add or amend the existing list.

Download [Sample CSV File](#)

11. Click **Process File**.

Then:

- If the upload is successful, the *Import complete* message appears
- If there was an issue with your upload, the details of the error will appear on-screen.

Section 15: Appendix A – Concur Travel Integrated with Concur Request

Overview

When Concur Request is integrated with Concur Travel, certain behaviors differ from Concur Travel without Concur Request integration:

- Concur Travel's Email Approval process is no longer used; Concur Request handles the approval process completely
- Different travel policy rule actions are used when enabling rules in Travel
- PNR documentation requirements vary

Rule Actions

There are two rule actions specifically used when Concur Travel is integrated with Concur Request.

The benefit of these rule actions in the context of integrated Concur Travel and Request is that they respond dynamically as different actions depending on the workflow ("Approve then Book" or "Book then Approve"). It is no longer necessary to create multiple Concur Travel rule classes for multiple Concur Request user groups if the travel policy is the same.

IF a company has multiple user groups with ***different request policies/workflows*** (for example "Approve then Book" for group 1 and "Book then Approve" for Group 2)

AND if all employees in group 1 and group 2 have the same travel policy

THEN The benefit of the new rules actions is that only one travel policy class must to be created for both groups:

- ◆ If a user is in a group with "Approve then Book" workflow, the rule will show in Travel as *Log for Report* or *Notify Manager*.
- ◆ If a user is in a group with "Book then Approve" workflow, the rule will show in Travel as *Require Approval*.

Action	General definition (more detail on the following pages)
Require Pre-approval & Log	Used when Concur Request is integrated with Concur Travel.
Require Pre-approval & Notify	Used when Concur Request is integrated with Concur Travel.

IMPORTANT – Note the following:

- These two options are not at all related to Concur Travel's pre-authorization feature.
- These new rule actions are designed to be used when Concur Request is integrated with Concur Travel, but they are available to all Concur Travel clients. When not integrated with Concur Request, they will behave as *Require Approval*.

Background

The Concur Request/Travel integration can be configured so that information flows between Concur Request and Concur Travel in several ways. The client can use any or all of these processes:

- Scenario 1 – Starting in Concur Request ("Approve Then Book"):
 - ◆ In Concur Request: The user creates and submits the request.
 - ◆ In Concur Request: The request goes through the approval workflow.
 - ◆ In Concur Travel: After Concur Request approval, the user is redirected to Concur Travel to book the segments using the Travel Wizard.
- Scenario 2 – Starting in Concur Travel ("Book Then Approve"), when configured so the request is always created regardless of travel rules:
 - ◆ In Concur Travel: The user books the trip segments using the Travel Wizard.
 - ◆ In Concur Request: The segment information is pushed from Concur Travel to Request and prepopulates the request. The user checks the request, adds additional details, and submits the request.
 - ◆ In Concur Request: The request goes through the approval workflow.
 - ◆ In Concur Request: Manager approves which triggers the issuance of tickets via Concur Travel.
- Scenario 3 – Starting in Concur Travel ("Book Then Approve"), when configured so the request is created only when rules are broken that require approval:
 - ◆ In Concur Travel: The user books the trip segments using the Travel Wizard.
 - ◆ If approval is required, then refer to Scenario 2.
 - ◆ If approval is not required, then the trip is directly confirmed.
- Scenario 4 – Enforce Offline/Online Policy at Request submission ("Book Then Approve"):
 - ◆ For this process, it does not matter where the request starts. When the user submits the request (in Concur Request), the offline/online setting (booking switch) evaluates and determines if any part of the booking must be completed in Concur Travel. If so, the user is redirected to Concur Travel.

- ◆ In Concur Travel: The user books the trip segments using the Travel Wizard.
- ◆ In Concur Request: The segment information is pushed from Concur Travel to Request and prepopulates the request. The user checks the request and submits it.
- ◆ In Concur Request: The request goes through the approval workflow.

Rule Actions

The rule actions define the process if associated travel rules are broken.

NOTE: In the following examples, be aware that since Concur Request is integrated with Concur Travel, there is no approval in Travel. Whenever approval is required, it is completed in Request.

For Scenario 1 – Starting in Concur Request, which means the request is already approved by the time the user is redirected to the Travel Wizard:

If a user selects a flight, car, etc. that breaks a *Require Pre-Approval & Notify* or *Require Pre-Approval & Log* rule.

Then:

The *Require Pre-Approval & Notify* rule responds like *Notify Manager*; the *Require Pre-Approval & Log* rule responds like *Log for Reports*.

– and –

The yellow (orange with Fiori theme) caution icon appears.

– and –

The user is required to select a violation reason, which is stored in the itinerary.

For the *Require Pre-Approval & Notify* rule, if a default approver is stored in Travel, then they will be notified by email. No additional action is required, however, and the trip is confirmed.

If a Travel admin runs reports for *Notify Manager* or *Log for Reports* violations, these transactions appear.

For Scenario 2, 3, and 4 (which means the request is **not** approved by the time the user is using the Travel Wizard):

If a user selects a flight, car, etc. that breaks a *Require Pre-Approval & Notify* or *Require Pre-Approval & Log* rule

Then:

The rule responds like *Require Approval*.

– and –

The yellow (orange with Fiori theme) caution icon appears.

– and –

The user is required to select a violation reason, which is passed back to the Concur Request approver.

If a Concur Travel admin runs reports for *Require Approval* violations, these transactions appear.

PNR Finishing

Force Finishing before Approval

If **Enable Request Integration** is activated (in the **Wizard Options** section of the travel configuration page), consider the information below before enabling **Force Finishing before Approval** (in the **PNR Finishing Configuration** section of the travel configuration page).

Forcing PNR finishing before approval is useful to ensure that tickets can be issued and payments can be processed prior to approval. Please take into consideration that if the approver later rejects the trip and the setting to auto-cancel the booking upon rejection is activated, this setting might generate costs if the ticket is not fully refundable.

If you want to ensure that tickets can be cancelled free of charge before approval, it is recommended to **not** activate this setting. Please take into consideration that the flight reservation is only on hold prior to approval and there is a risk that it might be cancelled by the airline without prior notice if the ticket deadline is reached.



For configuration information about this setting, refer to the *PNR Finishing Configuration Options* section of the *Travel System Admin User Guide*.

Policy Compliant Remarks

Optionally, agency fulfillment partners can provide a remark in the GDS PNR to advise Concur Travel if a trip conforms to company travel policy. This remark can be used conditionally to trigger approval workflow in Concur Request.



For specific format requirements, refer to the *GDS Reporting Requirements Worksheet* for the applicable GDS or the *Request TMC Integration Setup Guide*.

Offline (Agent-Booked) Approvals

For customers using Concur Travel integrated with Concur Request, there are additional GDS PNR documentation requirements when using the Offline Approval Queue. The following PNR documentation is mandatory for all PNRs sent to the offline approval queue:

- Travel Request ID
- Travel Request Agent Remark

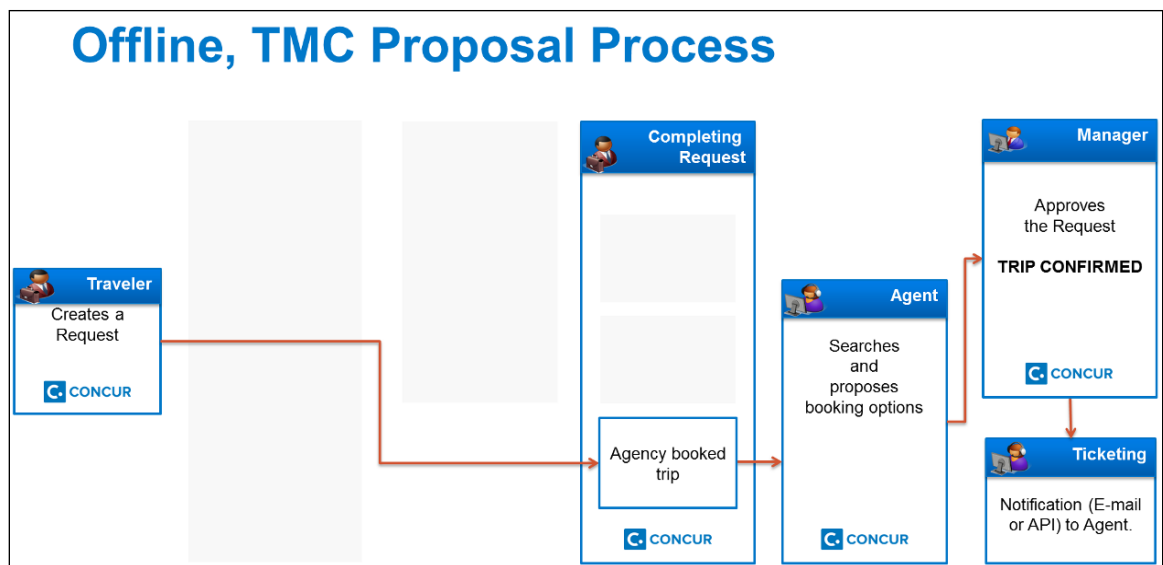
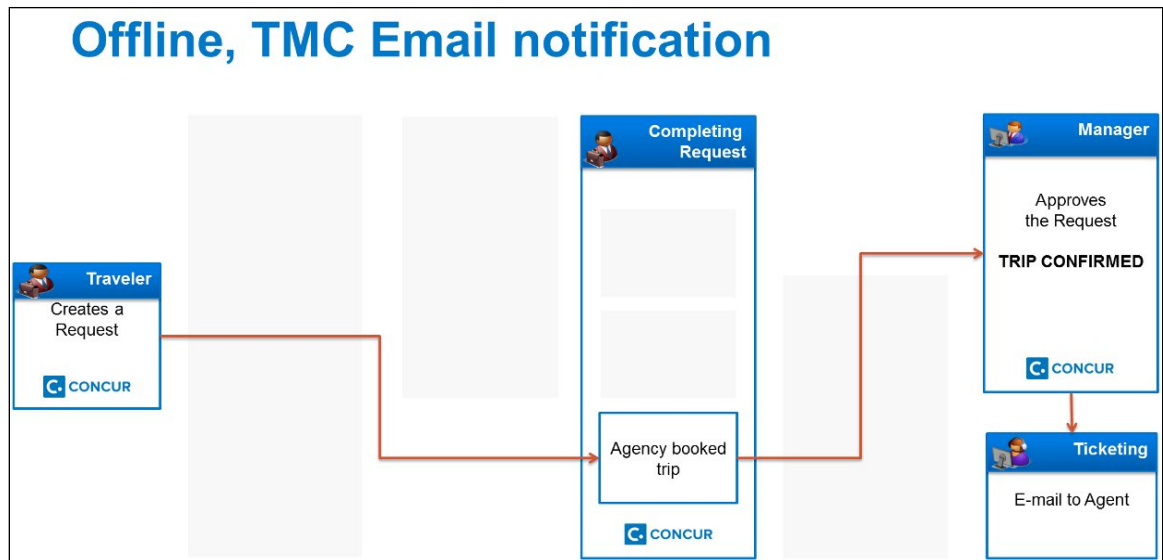
While not mandatory, best practice is to also include the Travel Request Policy Remark with every GDS PNR. Generally, managers want to ensure that a travel request pending approval conforms to company travel policy. When the TMC books the trip, they are also expected to enforce company travel policy. Most managers want travel policy compliance to be confirmed and displayed in the travel request. In addition, some clients will skip some approval workflow steps if the trip conforms to company travel policy.

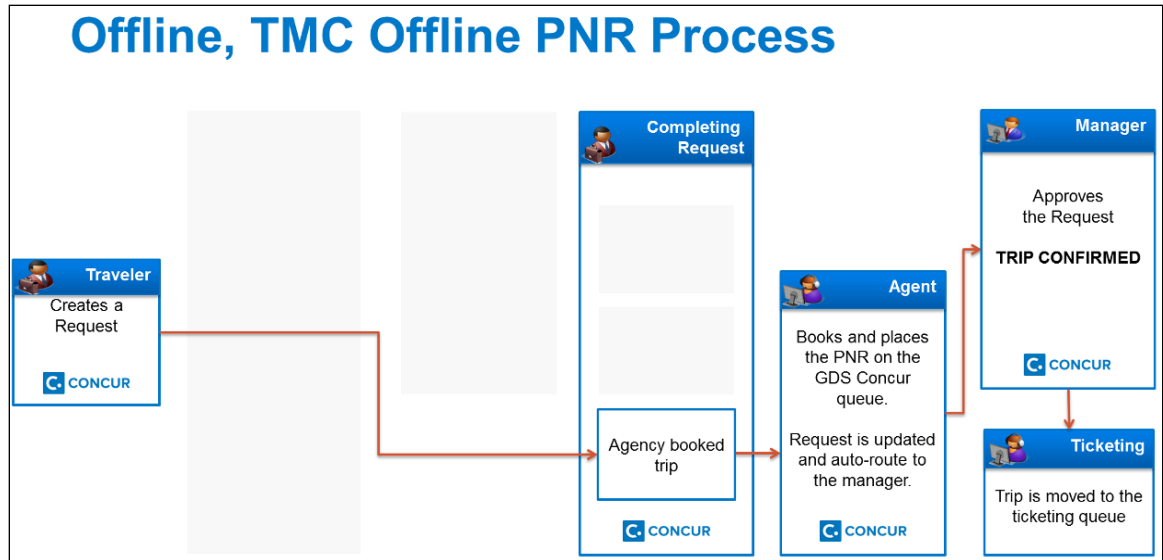


For more information on Request GDS PNR documentation, refer to the *Agency Partners GDS Worksheet* for the appropriate GDS.

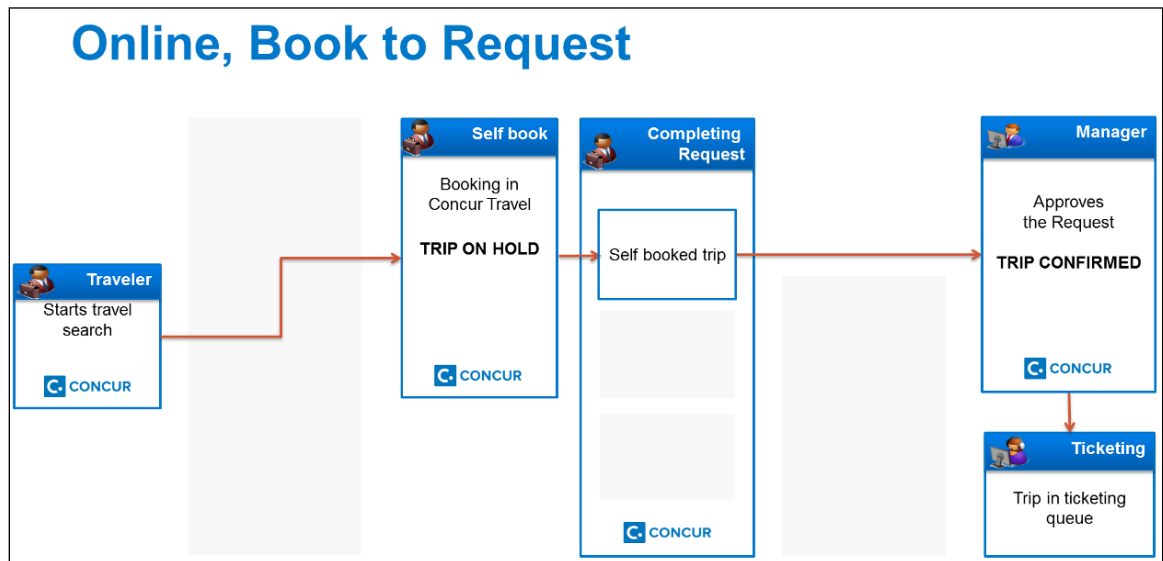
Concur Travel Integrated with Concur Request: Workflow Diagrams

Offline

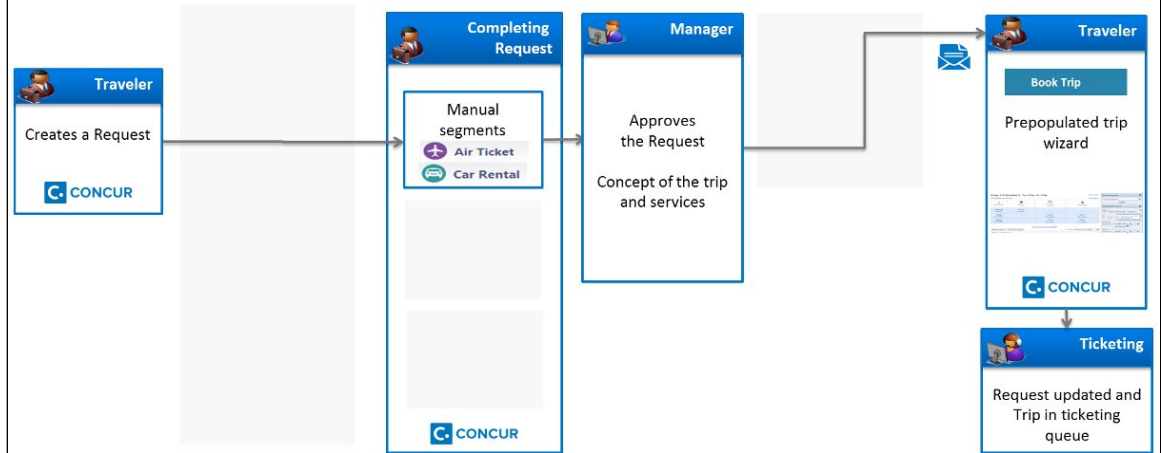




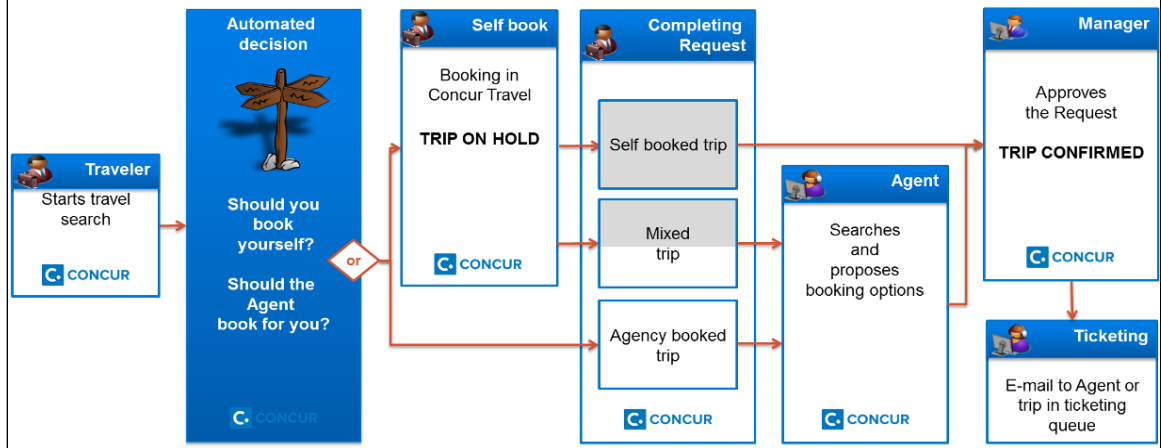
Online

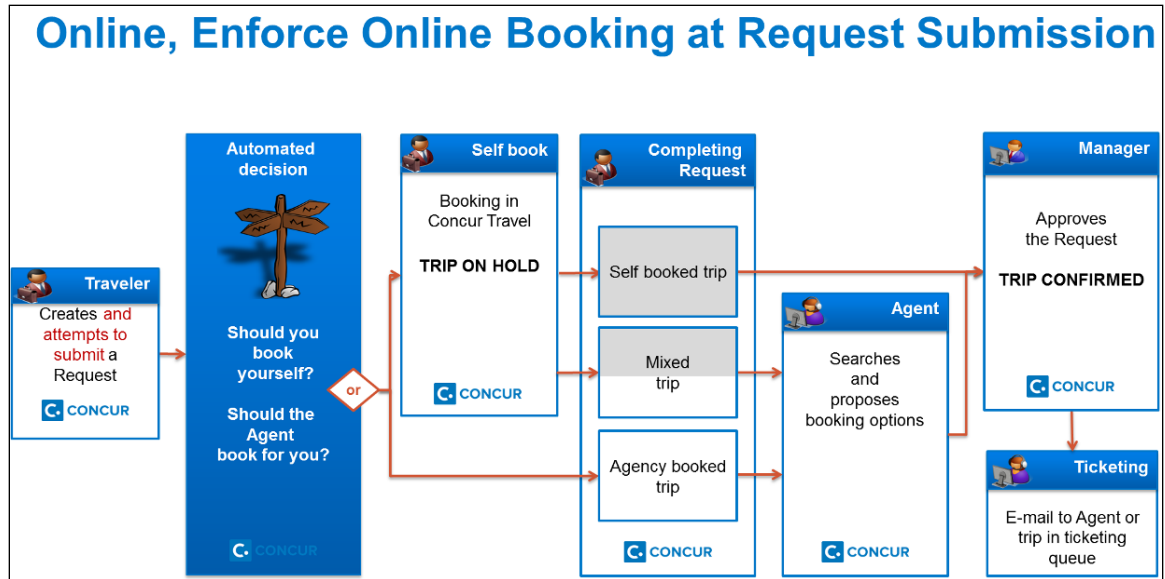


Online, Approve then book



Online & Offline, Booking Switch





New Concur Travel Experience: Book Then Approve Support (Professional Edition)

One of the existing workflows in legacy Concur Travel is the integrated "Travel-to-Request Book then Approve":

1. The user begins by booking their trip in Concur Travel.
2. The system then places reservations on hold that require ticketing where possible (for example, non-direct ticketing GDS air, SNCF French rail reservations).
3. Then the reserved travel segments populate the segments area of an automatically created request.

There are two setup options for the creation of a request based on a Concur Travel booking:

- Always create Request (for every booking).
- Create Request based on rules (only for bookings that require approval per travel policy setup).

This functionality is supported for all verticals in the new Concur Travel experience.

Feature parity is supported through the following:

- Require Passive approval rules will behave as Active Approval rule for Request: If a Concur Request was created for a Require Passive approval rule violation and the approval deadline has passed, Concur Travel will not confirm the trip if the Request approver has not taken action. Instead, the trip will be sent for cancellation.

- When Concur Travel sends a trip for cancelation, the trip may or may not be cancelable. When the trip is not cancelable, Concur Travel will instead autocomplete the trip.
- Booking Switch, when enabled, will be evaluated at the Concur Travel Home page and in the Edit search or Search again pages.
- Approval deadline will be populated for all created requests. If the Request approver does not take action or sends back the request, the trip will be auto canceled when the approval deadline is reached.

Limitations

Enforce Online/Offline will not be supported. The user will be re-directed to the legacy Concur Travel experience. If legacy Concur Travel does not support the vendor, the workflow will not work (for example, Trainline). Clients are requested to not configure this feature, if a return to the legacy Concur Travel experience is not possible.

Approve then Book will not be supported. The user will be re-directed to the legacy Concur Travel experience where possible.

Offline PNR update support is limited to the support in new Concur Travel experience.

Configuration

Follow the procedures for accessing the travel configuration page through the Travel System Admin. When you click the **Enable Request Integration** checkbox, a list of options appears:

- **Always Create Request:** A request is always created, regardless of travel rules.
- **Create Request Based on Concur Travel Rules:** If a rule using the "Require Approval" enforcement level is broken, then a request is required. If no rules using the "Require Approval" enforcement level are broken, then the process of creating a request is bypassed and the trip is sent directly to ticketing.

NOTE: Any rules that are broken that use other levels of enforcement (Require Passive Approval, Notify Manager, etc.) will not redirect the user to a request.

Section 16: Appendix B – Vendor Exclusions (Professional Travel Only)

Professional and Standard Travel

This feature applies only to Professional Travel only.

Best Practice

Consider not excluding the vendor; not using this feature. Instead, create a rule for the vendor using the *Show But Do Not Allow* rule action and perhaps add messaging. That way the user knows the vendor is included by simply not allowed by company policy.

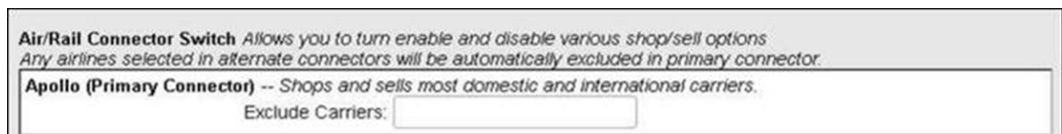
IMPORTANT

Note the following about this feature:

- Be careful when excluding vendors. It might be tempting to exclude all except preferred vendors. Be aware that this can cause issues in those locations where the preferred vendors are not available.
- Excluding vendors may cause a problem when users know that a particular vendor should be in the search results (for example, if they go to the vendor's web site and see availability). Based on that, the user may think that Concur Travel is not working as expected. The user may then seek other booking options, eventually resulting in the company losing control of compliance.
- The Vendor Exclusion feature affects **only** single-vendor searches (like having all air legs using one airline only).

If the admin excludes a carrier as vendor, the admins should also exclude the vendor as well in the rules as marketing and operating carrier. Otherwise, it will appear in the "Mixed carriers" section in the airline Matrix on the search results page.

- The Vendor Exclusion feature stops the display in the search results but not exclude the vendor from the actual search. To exclude from the search, set this option on the travel configuration page:



Air/Rail Connector Switch Allows you to turn enable and disable various shop/sell options
Any airlines selected in alternate connectors will be automatically excluded in primary connector.

Apollo (Primary Connector) -- Shops and sells most domestic and international carriers.

Exclude Carriers:

However, this option applies only to air and rail – and only GDS, not direct connect.

Configuration

Exclude a Travel Vendor

▶ **To exclude a vendor:**

1. Click **Administration** > **Company** (on the sub-menu) > **Company Admin**.

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

- In the **Travel Administration** section of the left menu, click **Travel Admin.** The **Travel Policy Administration** page appears.
- Click the **Travel Vendor Exclusions** tab.

- In the **Travel Configuration** list, select the desired configuration. The page refreshes, showing the excluded vendors for the selected configuration.
- Complete the following fields.

Field	Description/Action
Air Carriers Hotel Chain Car Vendors	Do one of these: <ul style="list-style-type: none"> Select (enable) the check box for each vendor that you want to exclude from online searches. Click Check All to select all vendors in the list. Click Check None to clear all check boxes in the list.
Apply settings to	This option appears with multiple configurations. Click the appropriate option.

- Click **Save Settings**.

Section 17: Appendix C – Glossary

Please note the following glossary terms:

- **Segment** is the array of flights between departure and arrival locations and vice versa for roundtrip. For multi-city travel, a segment is the array of flights between each stopover.
- **Leg** is any flight that is part of segment. A segment can contain one or multiple legs.
- **Trip** is a collection of travel services (air, rail, hotel, car and ground), and it synonymous with *Itinerary*.
- **Marketing airline** is the airline that generates a ticket and processes the payment for that ticket.
- **Operating airline** is the airline that operates the aircraft.

