Step by step guide:

Adding and editing policies in Concur TripLink







We've made it easier to update your travel policy.

Every time travel changes, travel policies change. And if you want your travelers to be able to follow those policies, you need to make sure Concur TripLink is always up to date.

In just a few simple steps, we'll show you how.

Your Travel Policy Admin screen contains a section that applies to Concur TripLink itineraries – whether they're brought in through TripIt Pro or through a Concur TripLink supplier. In it, you'll see the policy rules from which you can choose.

- Be sure to check these rules against your policy to make sure they're in line.
- If you use Concur Travel, make sure you have the same controls selected for both tools.

	Company Admin Home	Company Administration	
Click Home	Company Admin Approval Queues Billing Administrator Company Locations Menu Administrator Org Unit Admin Report Admin Text Customization Password Administrator Import Data Manage Custom Fields Company Settings Share Custom Fields Login URL Manager New Concur Travel Experience Authentication Admin User Administration Add User Self-Registration Setup Self-Registration Approval Send Mobile Instructions User Permissions Company Groups Travel Administration Virtual Payment Admin Manage TripLink Settings E-Receipt Admin	<section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header>	 Billing Administrator View current and past bills. Company Locations and Maps Where are your offices? Modify your business locations. Menu Administrator Configure Concur menus to display URLs in our menu headings. Permission Administrator Who can access what? Setup your permissions (user clahere. Travel Policy Administrator Administer your company's travel policy. Employee Maintenance Can Only Edit Users User Assistance Settings Manage your organization's user assistance settings



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Scroll down, and click **Travel Rule Builder** (left menu). Company Admin Home

Company Admin

Approval Queues Billing Administrator Company Locations Menu Administrator Org Unit Admin Report Admin Text Customization Password Administrator Import Data Manage Custom Fields Company Settings Share Custom Fields Login URL Manager New Concur Travel Experience

Authentication Admin

Administration

Self-Registration Setup Self-Registration Approval Send Mobile Instructions User Permissions Company Groups

Administration Virtual Payment Admin Manage TripLink Settings E-Receipt Admin Travel Admin Travel Rule Builder Travel Reporting Travel Templates

Credit Card BIN Restrictions

User Administration

User

Add User

Travel

Administer Approval Queue

Company Administration

Here is where you reassign items from one manager to another, if a manager is unavailable for some reason.

Meetings Admin Administer Meetings

Group and Shared Resources Administration Manage groups of people, and shared resources like group calendars and group contacts.

Organization Unit Administration Set up your company's organizational units/departments.

Travel Meeting Center Admin Third Party Can manage Travel Meetings

User Administration Here is where you add, modify and delete users.

Authentication Admin Configure authentication policies and perform bulk password actions.

New Concur Travel Experience Manage New Concur Travel Experience Preferences Billing Administrator View current and past bills.

Company Locations and Maps Where are your offices? Modify your business locations.

Menu Administrator Configure Concur menus to display URLs in our menu headings.

Permission Administrator Who can access what? Setup your permissions (user classes) here.

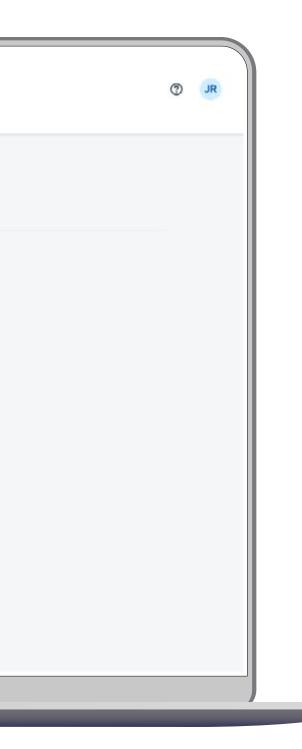
Travel Policy Administrator Administer your company's travel policy.

Employee Maintenance Can Only Edit Users

User Assistance Settings Manage your organization's user assistance settings



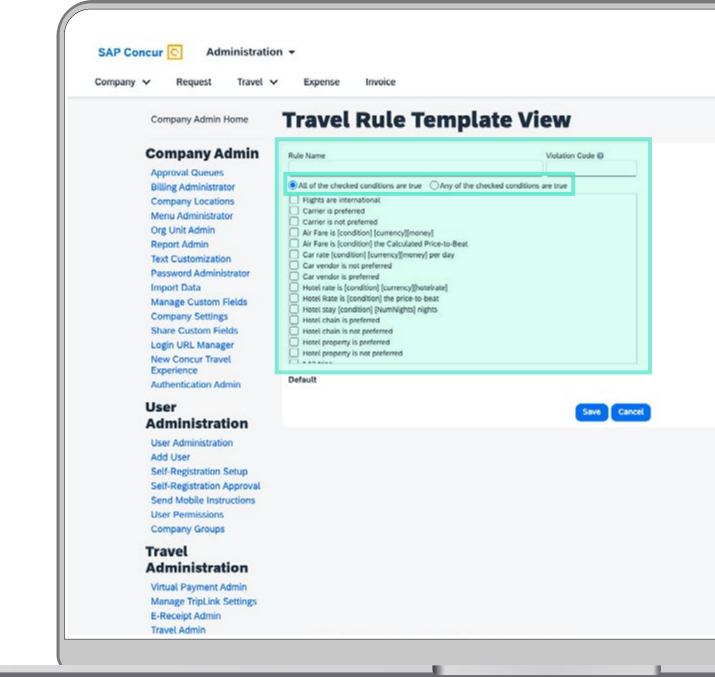
Administration + SAP Concur Company V Request Travel 🗸 Expense Invoice **Travel Rule Template View** Company Admin Home Under Select Rule Template Edit Rule Values **Company Admin** Category, select Concur TripLink. ж Select Rule Template Categor Approval Queues **Billing Administrator** Travel Itinerary **Company Locations** Flight Menu Administrator Flight - View More Fares Org Unit Admin Flight - Class of Service Report Admin Flight - Flex Fare buckets Text Customization Ticket Change Password Administrator Train Import Data Manage Custom Fields Hotel Click **OK**, then **Add**. Company Settings Share Custom Fields Concur TripLink Login URL Manager Messages - Flight Search Criteria New Concur Travel Messages - Air Fare Shop Results Experience Messages - Hotel Search Criteria Authentication Admin Messages - Hotel Search Results User Messages - Car Search Criteria Administration Messages - Car Search Results User Administration Messages - Itinerary Add User Custom Trip Attributes - Itinerary Self-Registration Setup Self-Registration Approval Send Mobile Instructions User Permissions Company Groups Travel Administration Virtual Payment Admin Manage TripLink Settings E-Receipt Admin Travel Admin



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Enable your desired rules around Concur TripLink compliance.

Here, you can view a list of all the available attributes you can use to create a policy criteria. You can have one criteria or multiple—if you have multiple, make sure you highlight **All of the checked conditions are true**, or **Any of the checked conditions are true**.



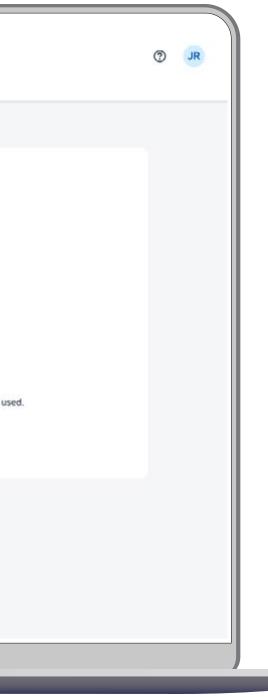


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For example, you can create a rule that says a certain "Carrier or Hotel is not preferred."

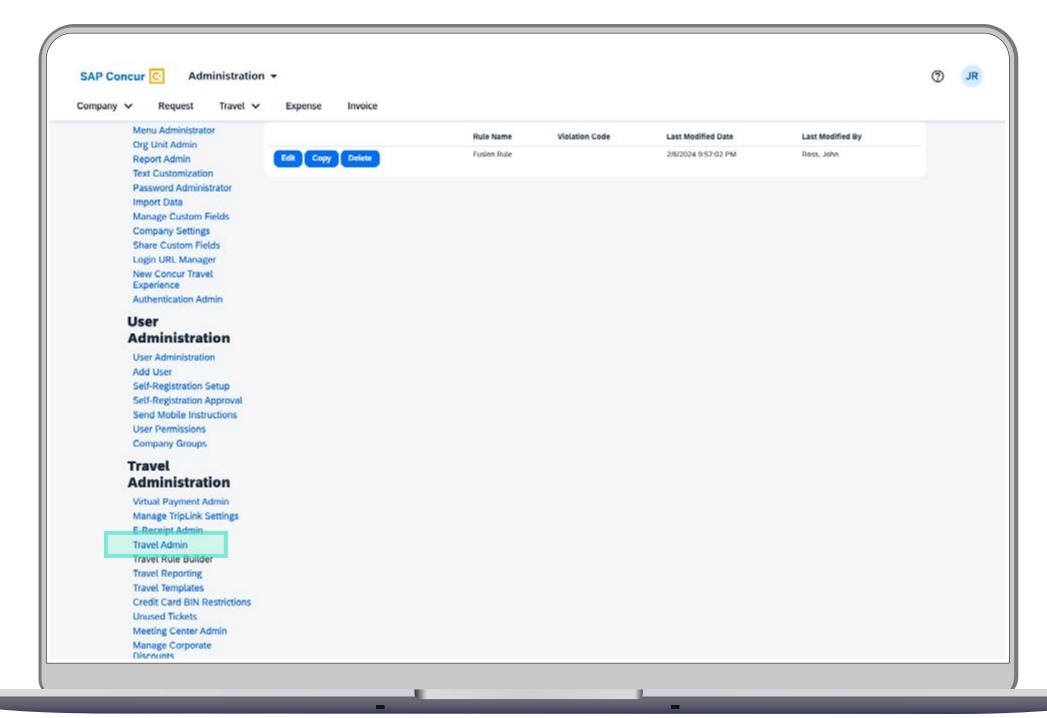
You can also save steps by selecting the desired rule classes (any or all) when you save this created policy rule.

Company 🗸 Request Travel	Expense Invoice		
Company Admin Home	Travel Rule Ter	mplate View	
Company Admin Approval Queues Billing Administrator Company Locations Menu Administrator Org Unit Admin Report Admin Text Customization Password Administrator Import Data Manage Custom Fields Company Settings Share Custom Fields Login URL Manager New Concur Travel Experience Authentication Admin User Administration Add User Self-Registration Approval Send Mobile Instructions User Permissions Company Groups	Rule Name All of the checked conditions are true Rights are international Carrier is preferred Air Fare is [condition] [currency][money] Air Fare is [condition] the Calculated Price Car rate [condition] [currency][money] per Car vendor is not preferred Car vendor is preferred Hotel rate is [condition] [currency][money] per Car vendor is preferred Hotel rate is [condition] [currency][money] Hotel rate is [condition] [wmNights] nights Hotel property is not preferred Hotel property is not preferred Hotel chain is not preferred Hotel property is not preferred Hotel property is not preferred Hotel property is not preferred	-to-Beat day	be overridden wherever this rule tem
Administration Virtual Payment Admin Manage TripLink Settings E-Receipt Admin Travel Admin			

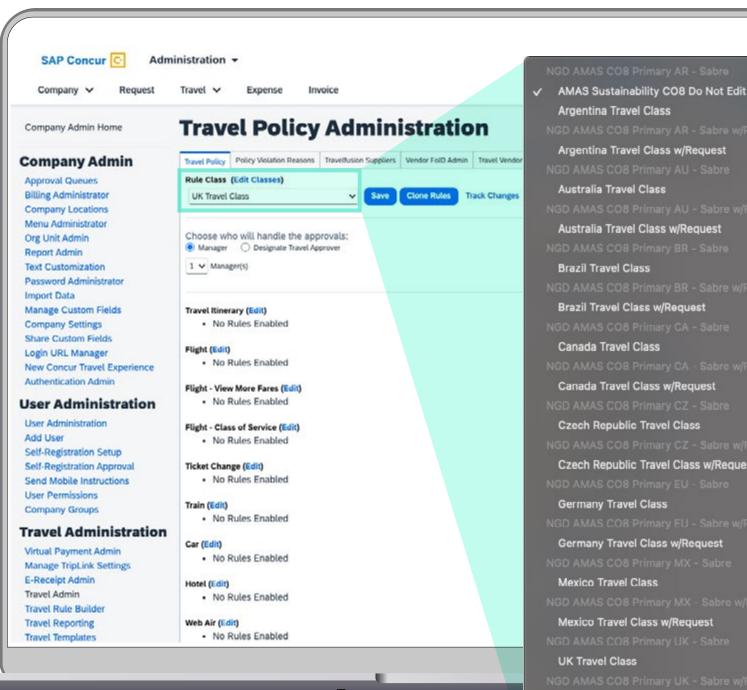


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Once you create and save your rule in Travel Rule Builder, go to **Travel Admin**.



In Travel Admin, click the dropdown and select the **Rule Class** (e.g. Product Development, Sales, etc.).



UK Travel Class w/Request

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Then scroll to **Concur TripLink** and click **(Edit)**.

Company Admin Home

Company Admin

Approval Queues Billing Administrator Company Locations Menu Administrator Org Unit Admin Report Admin Text Customization Password Administrator Import Data Manage Custom Fields Company Settings Share Custom Fields Login URL Manager New Concur Travel Experience Authentication Admin

User Administration

User Administration Add User Self-Registration Setup Self-Registration Approval Send Mobile Instructions User Permissions Company Groups

Travel Administration

Virtual Payment Admin Manage TripLink Settings E-Receipt Admin Travel Admin Travel Rule Builder Travel Reporting Travel Templates Credit Card BIN Restrictions Unused Tickets Meeting Center Admin Manage Corporate Discounts

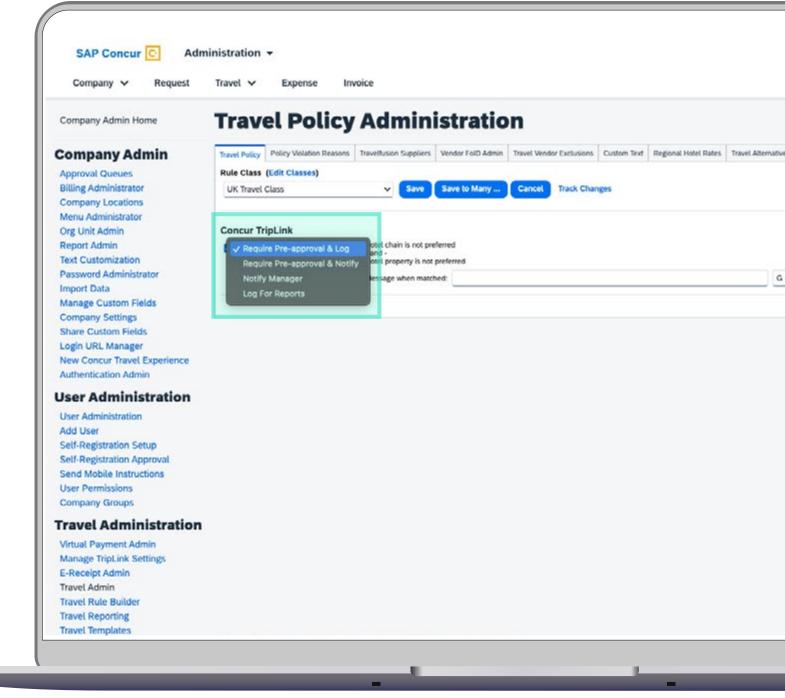
Travel Policy Administration Travel Policy Violation Reasons Travelfusion Suppliers Vendor FoID Admin Travel Vendor Exclusions Custom Text Regional Hotel Rates Travel Attem Rule Class (Edit Classes) UK Travel Class Save Clone Rules Track Changes Choose who will handle the approvals: Manager O Designate Travel Approver 1 V Manager(s) Travel Itinerary (Edit) No Rules Enabled Flight (Edit) No Rules Enabled Flight - View More Fares (Edit) No Rules Enabled Flight - Class of Service (Edit) No Rules Enabled Ticket Change (Edit) No Rules Enabled Train (Edit) No Rules Enabled Car (Edit) No Rules Enabled Hotel (Edit) No Rules Enabled Web Air (Edit) No Rules Enabled Concur TripLink (Edit) No Rules Enabled Messages - Flight Search Criteria (Edit)

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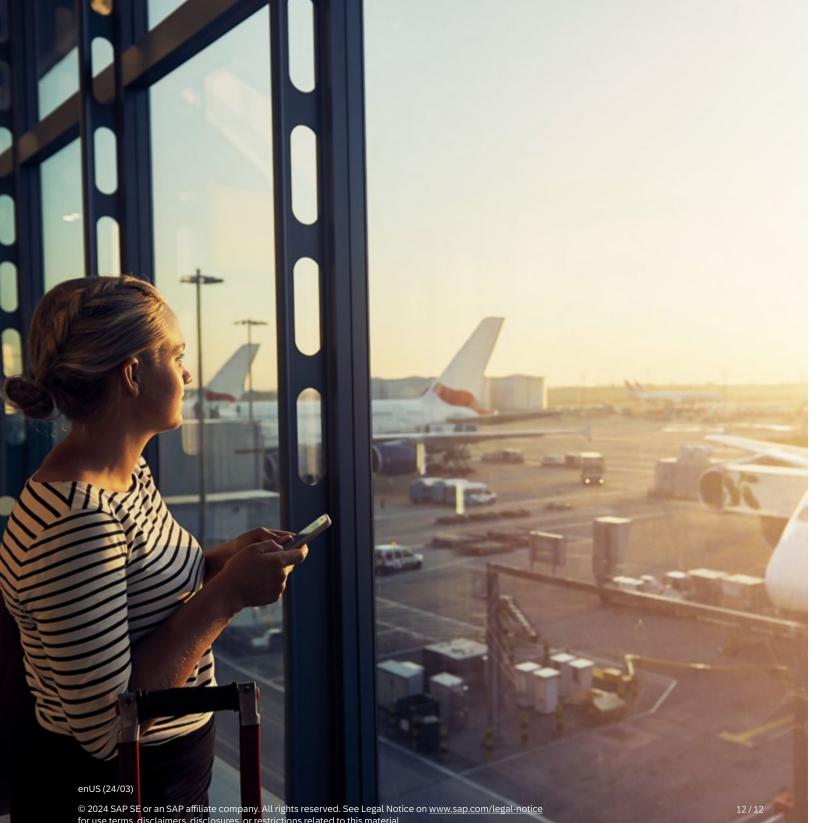
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To view the TripLink-specific criteria that you had previously set up, **enable your rule**, and **assign the action**.

To Recap: First, we set up the criteria in Travel Rule Builder, and here, we're assigning it to the rule class and setting the action to be applied/enforced.



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Compliance is just that easy.

Make sure you check back often to keep Concur TripLink aligned with your travel strategies – and your travelers on top of changing policies.

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