Step by step guide:

Adding and editing policies in Concur TripLink

SAP Concur

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.
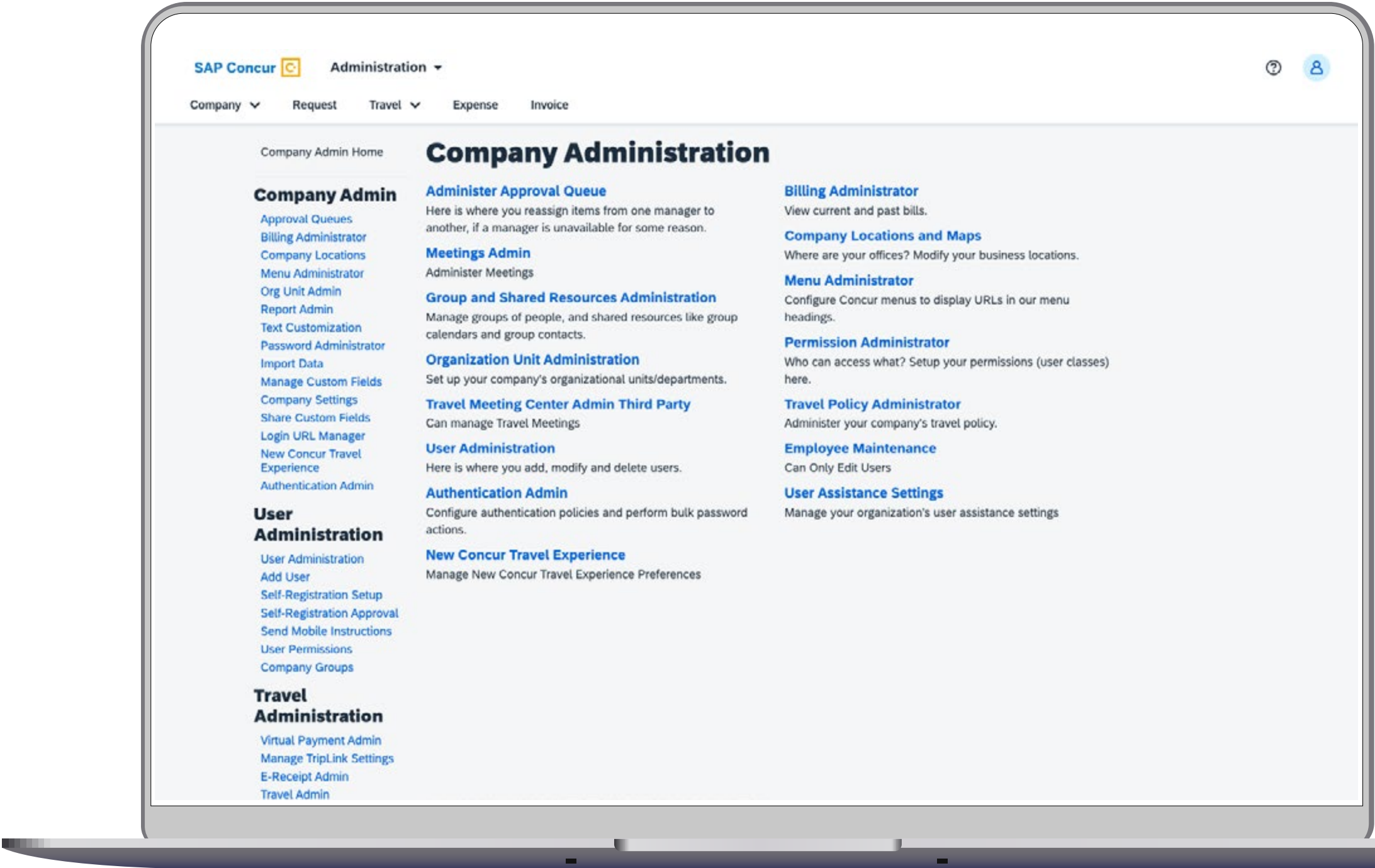
- Be sure to check these rules against your policy to make sure they're in line.

- If you use Concur Travel, make sure you have the same controls selected for both tools.

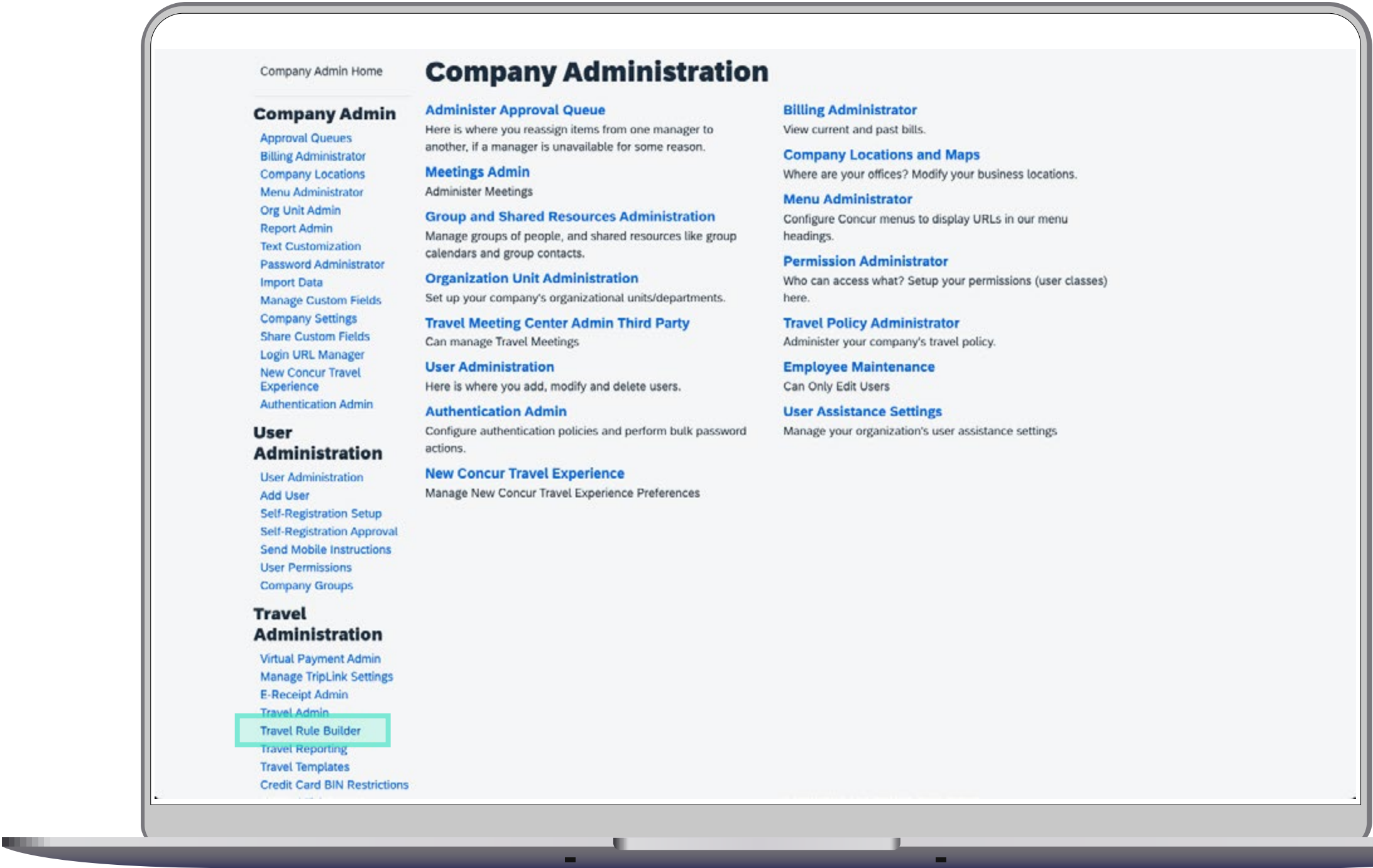# Adding and editing policies in Concur TripLink

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Click **Home**

 ↳ **Company Admin**

SAP Concur [C]   Administration ▾

Company ▾   Request   Travel ▾   Expense   Invoice

Company Admin Home

Company Administration

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

Administer Approval Queue
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

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Scroll down, and click
Travel Rule Builder (left menu).

Company Admin Home

Company Administration

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Approval Queues
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Company Locations
Menu Administrator
Org Unit Admin
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Text Customization
Password Administrator
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Share Custom Fields
Login URL Manager
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Add User
Self-Registration Setup
Self-Registration Approval
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Travel Administration

Virtual Payment Admin
Manage TripLink Settings
E-Receipt Admin
Travel Admin
Travel Rule Builder
Travel Reporting
Travel Templates
Credit Card BIN Restrictions

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Under **Select Rule Template Category**, select **Concur TripLink**.

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Click **OK**, then **Add**.

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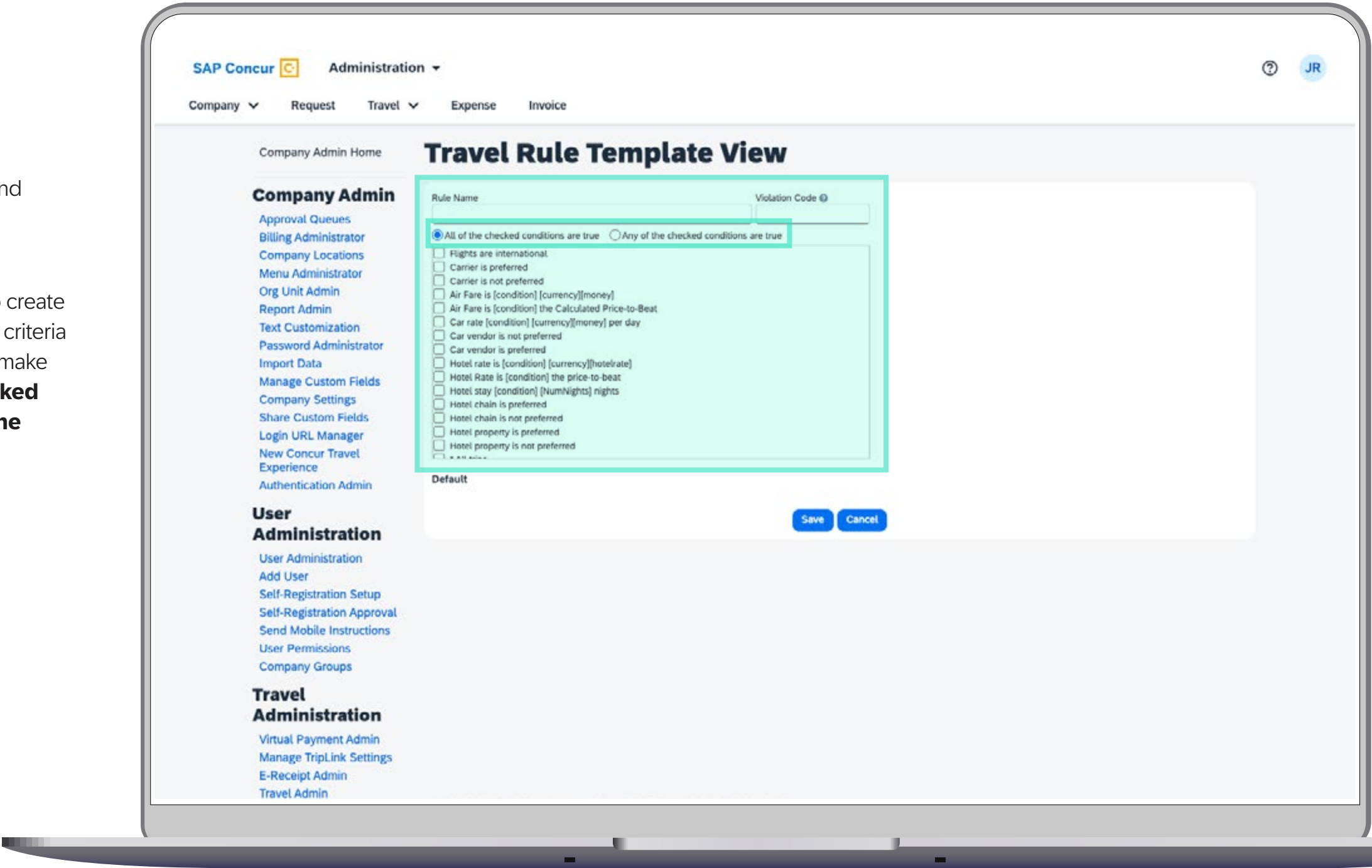
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For example, you can create a rule that says a certain "Carrier or Hotel is not preferred."

You can also save steps by selecting the desired rule classes (any or all) when you save this created policy rule.
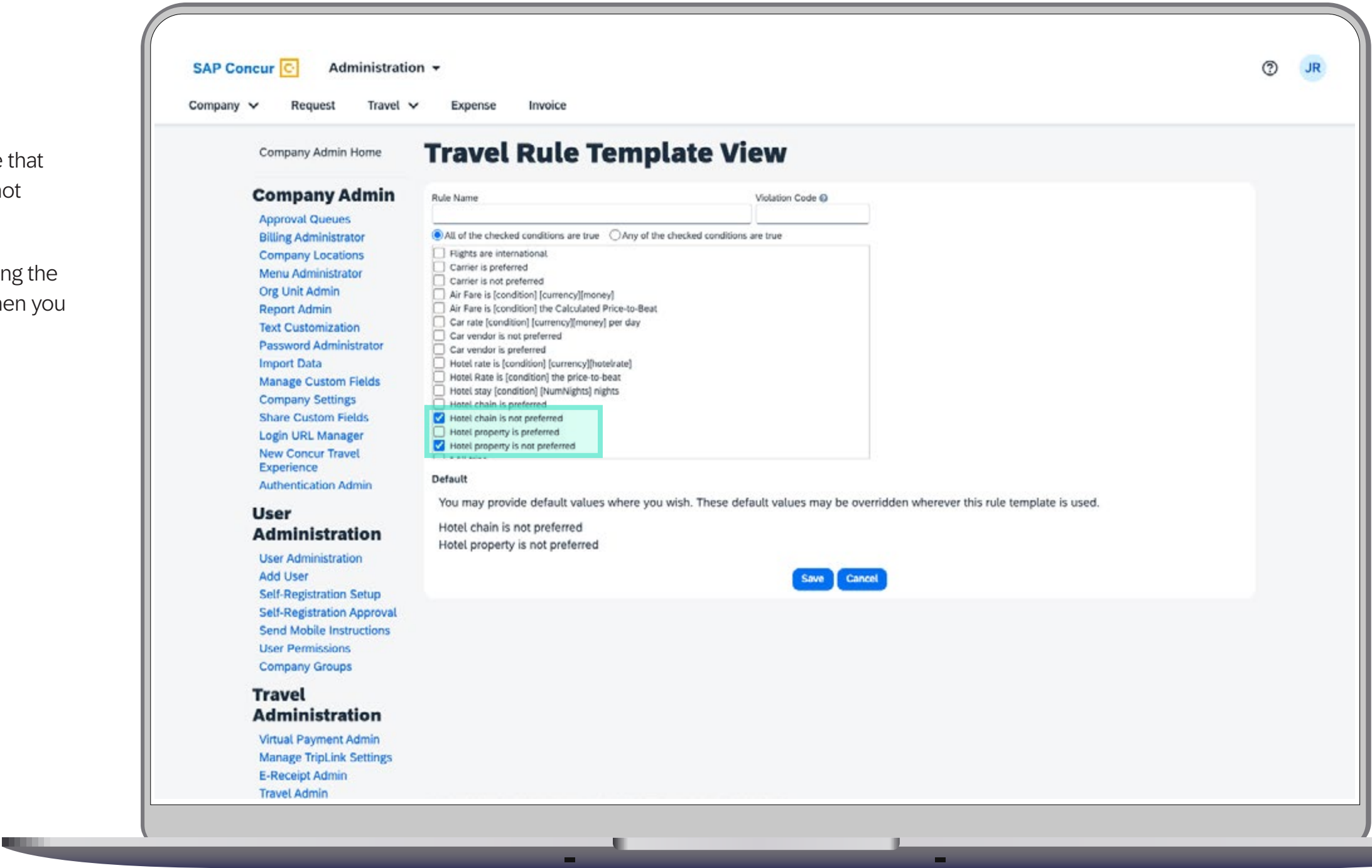
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Once you create and save your rule in Travel Rule Builder, go to **Travel Admin**.
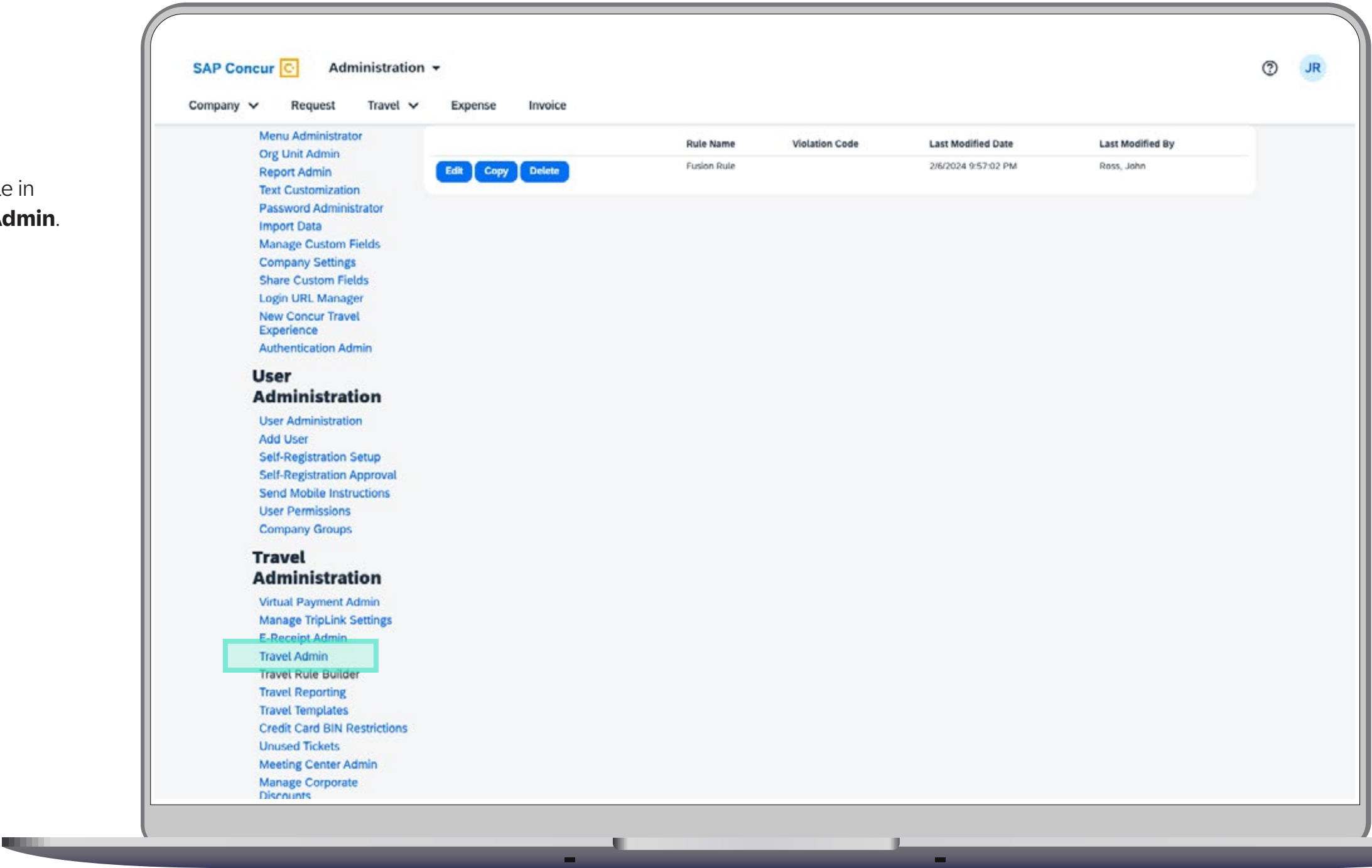
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In Travel Admin, click the dropdown and select the **Rule Class** (e.g. Product Development, Sales, etc.).
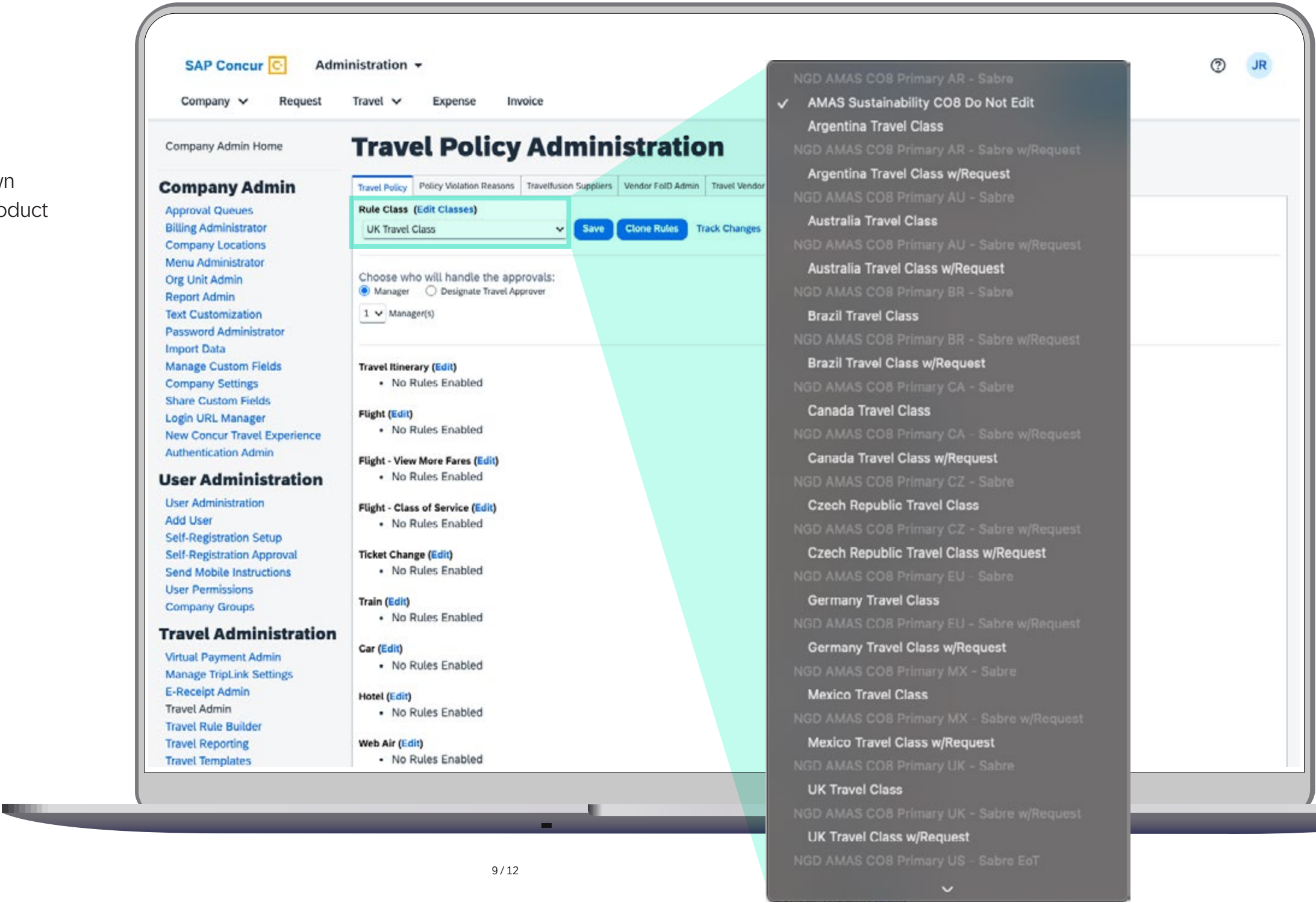
8

Then scroll to **Concur TripLink** and click **(Edit)**.
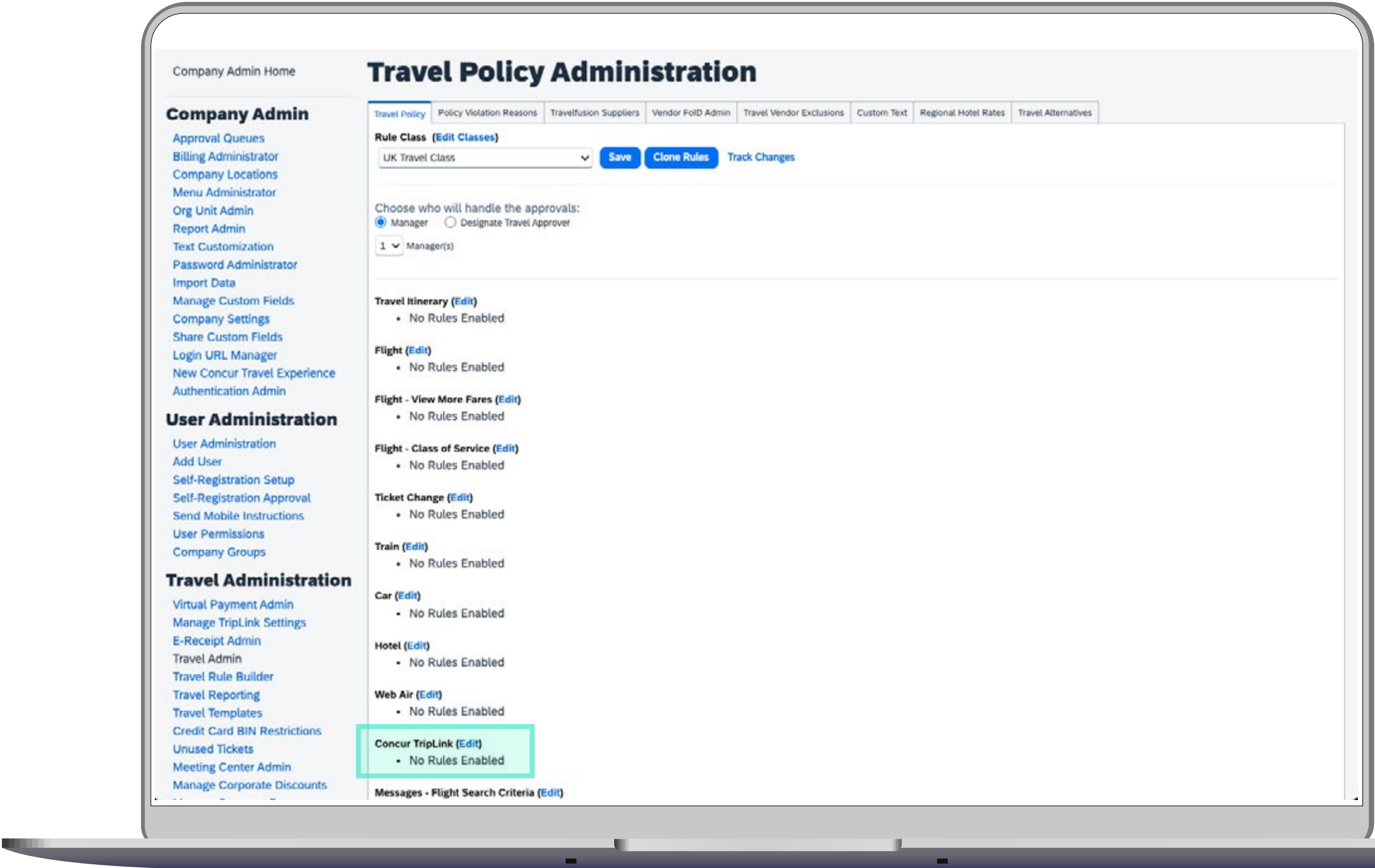
9

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.
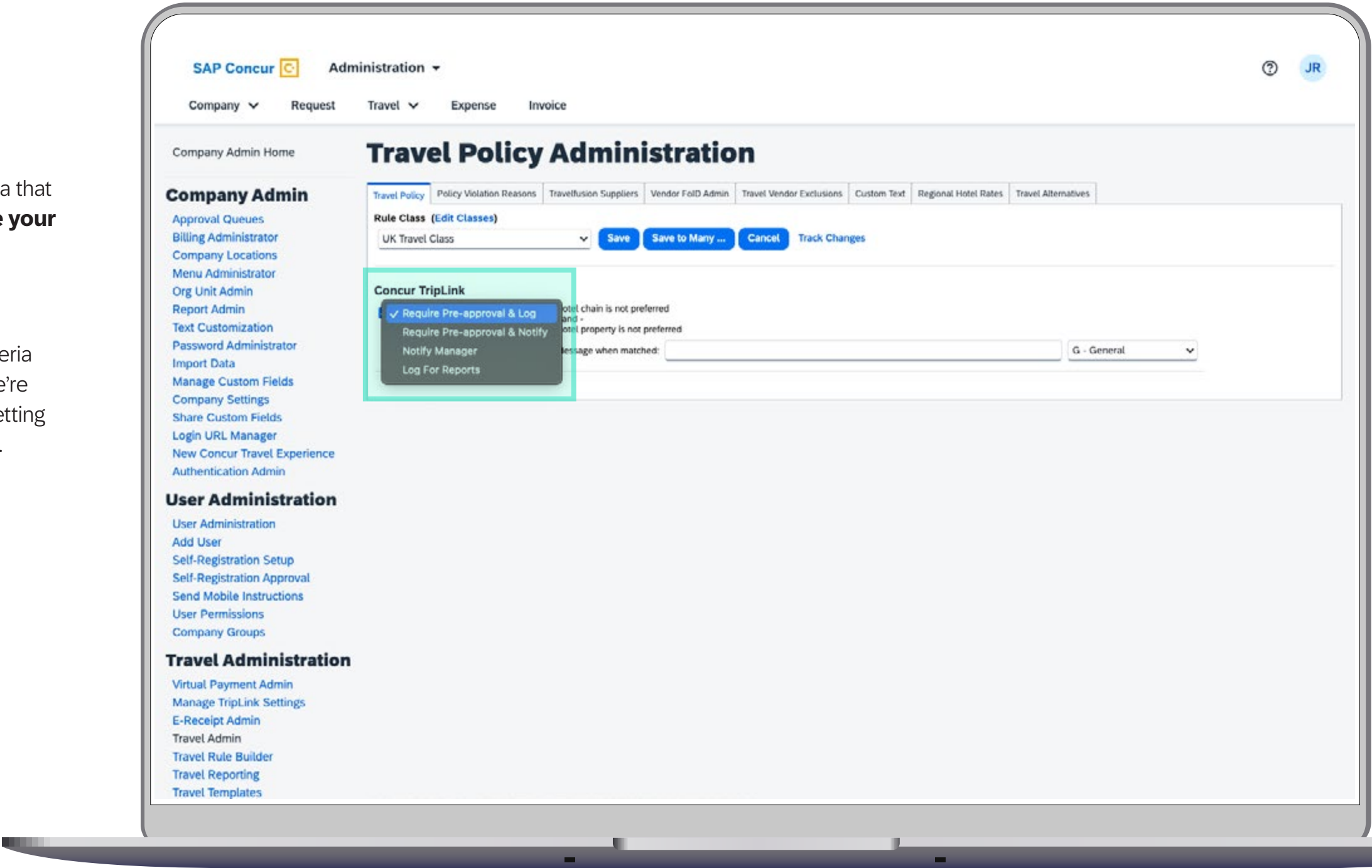
Compliance is just that easy.

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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