

# **Concur Invoice: Policy Group Configuration**

## **Setup Guide for Standard Edition**

**Last Revised: December 10, 2021**

Applies to these SAP Concur solutions:

- Concur Expense
    - Professional/Premium edition
    - Standard edition
  - Concur Travel
    - Professional/Premium edition
    - Standard edition
  - Concur Invoice
    - Professional/Premium edition
    - Standard edition
  - Concur Request
    - Professional/Premium edition
    - Standard edition
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# Revision History

Date	Notes/Comments/Changes
August 20, 2022	Minor edits, cover date not updated.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
December 10, 2021	Updated instructions for <b>Product Settings</b> page
March 4, 2021	Updated the copyright year; no other changes; cover date not updated
April 22, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 8, 2020	Updated the copyright; no other changes; cover date not updated
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
March 21, 2019	Updated "payment request" to "invoice". Updated "Concur" to "SAP Concur". Updated images.
January 29, 2019	Updated the copyright; no other changes; cover date not updated
April 11, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 15, 2018	Updated "Show Advanced Settings" text.
November 4, 2017	Updated guide to include new <b>Product Settings</b> page, which replaces the Setup Wizard.
July 29, 2017	Added information about country packs.
June 3, 2017	Added information about Invoice default policy group being removed once admin has added one or more policy groups.
March 18, 2017	Updated with menu option name change to access Setup Wizard.
December 13, 2016	Changed copyright and cover; no other content changes.
November 20, 2015	Updated graphics to reflect newly styled step numbers.
March 13, 2015	Updated the images to the enhanced UI and made general updates to the content.
September 16, 2014	Added information about two user interfaces; no other content changes
August 22, 2014	The <b>Can change vendors</b> setting has been changed to <b>Can change vendors on assigned requests</b> .

<b>Date</b>	<b>Notes/Comments/Changes</b>
May 16, 2014	New document. (This content originated from the <i>Invoice Setup Guide for Concur Standard</i> .)

# Policy Group Configuration

This page of Product Settings is visible only when enabled by SAP Concur.

## Section 1: Overview

If you created one or more policy groups on the **Policy Group** page, you can select one of these policy groups in the **Policy Group Configuration** page and configure specific options that apply only to that group.

The **Policy Group Configuration** page also allows clients to decide if vendor banking information should be entered when the user requests a new vendor.

In addition, you can also elect to allow or prevent users from creating invoices or change vendors.

The screenshot displays the SAP Concur interface for Policy Group Configuration. At the top, there is a navigation bar with the SAP Concur logo and menu items: Requests, Expense, Invoice, Approvals, Analytics, and App Center. On the right side of the navigation bar, there are links for Administration and Help, and a user profile icon. The main content area is titled 'Policy Group Configuration' and includes a breadcrumb trail: Expense & Invoice Settings > Policy Group Configuration. Below the title, there is a sub-header: 'UNITED STATES' and 'United States Default Group', followed by a 'Save' button. The main configuration area contains the following sections:

- Select whether Vendor Banking information is hidden, required, or optional for:**
  - Invoice Owner: Hidden (dropdown menu)
  - Vendor Manager: Hidden (dropdown menu)
- Allow Invoice Owners in group to create requests and change vendors:**
  - Can create payment requests.
  - Can change vendors on assigned requests.

**NOTE:** If the Country Pack feature has been activated, you will be able to select certain settings per country pack and policy group.

## Section 2: Configure Policy Groups

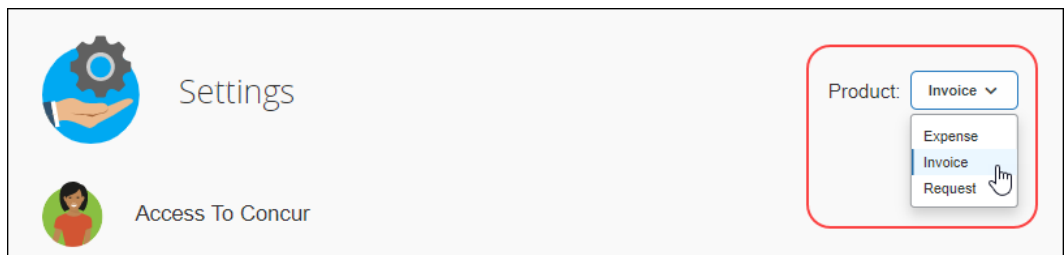
On the **Policy Group Configuration** page, you select the following:

- A country pack (if this feature has been activated)
- A policy group to configure
- Vendor banking information options
- Whether or not Concur Invoice owners can create invoices and change vendors

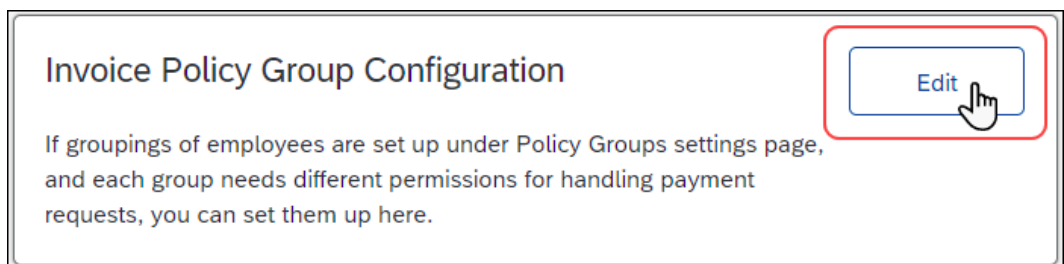
### Access the Policy Group Configuration Page

▶ **To access the Policy Group Configuration page:**

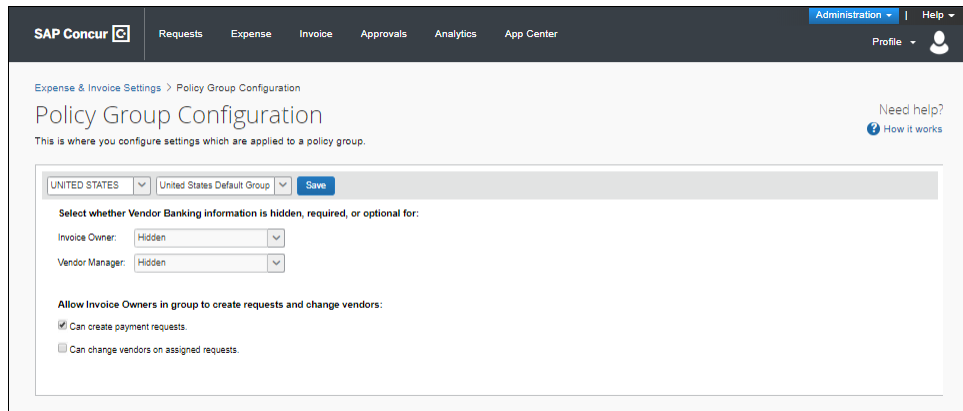
1. Click **Administration > Invoice Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice*.



3. In the **Capturing Spend** section, on the **Invoice Policy Group Configuration** tile, click **Edit**.

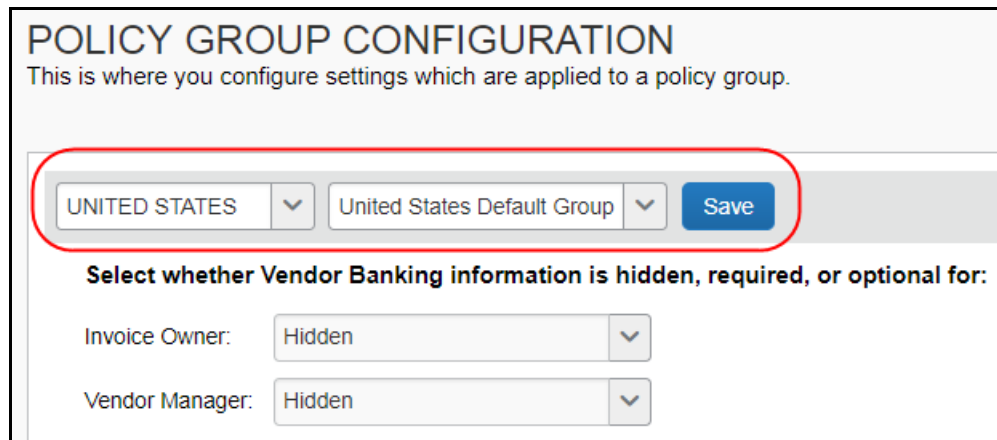


The **Policy Group Configuration** page appears.



## Select Country to Configure

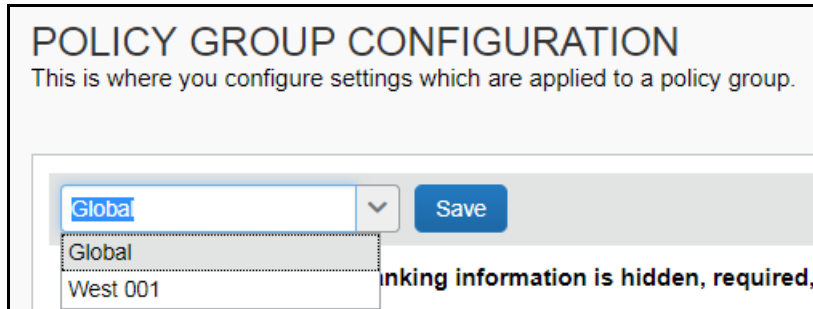
If your company is using the Country Pack feature and more than one country pack has been activated, you will be able to select a country and a policy group and then configure any settings to apply to that country and policy group.




For more information about country packs, refer to the *Concur Invoice: Country Packs With VAT Setup Guide*.

## Select Policy Group to Configure

The policy group you select in the list next to the **Save** button is the one to which any configuration changes you perform on this page will be applied, and no other.



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**NOTE:** The default policy group will not be available once the admin has created one or more policy groups. If your company is using Capture Processing, ensure that you change the policy in Capture Processing to match the one in Concur Invoice.

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## Select Vendor Banking Information Options

To allow clients to decide if vendor banking information should be entered when the user requests a new vendor is done by assigning the requirement to add this information to two roles, the *Invoice User* and the *Vendor Manager*. You can decide to hide the entry of banking information, or make this either optional or required. This gives a client the flexibility to decide, by role, if vendor banking information must be added by a user.

The administrator selects an option for each role which determines if the **Vendor Banking Information** section of the **Request New Vendor** screen should be hidden to the user or, if it appears, if the fields the user fills out in this section are either of type required or optional.

The **Vendor Banking Information** section displays to the user or not based on the following choices:

- **Hidden:** The section does not appear, and there is nothing for the user to see or fill out.
- **Required:** The section appears, and all fields that must logically be filled out are marked as Required (red highlight). The user cannot successfully complete the new vendor request without putting the necessary data into the fields.
- **Optional:** The section appears, but no enforcement of data entry is required unless the user fills in one or more Required fields. Under this condition, all Required fields *must* be filled out.



Select whether Vendor Banking information is hidden, required, or optional for:

Invoice Owner: Hidden

Vendor Manager: Hidden

Allow Invoice Owners to create requests and change vendors: Required

► **To select vendor banking information:**

To configure a vendor form, on the **Policy Group Configuration** page, click the **Invoice Owner** and/or **Vendor Manager** field and, from the list, select *Hidden*, *Required*, or *Optional*.

## Enable or Disable Request Creation and Vendor Change by Owner

You can choose to allow or prevent Invoice Owners from creating invoices and/or changing the currently assigned vendor to a different vendor for any assigned invoice. These options are selected (enabled) by default. The options that you choose are applied to all the users in the policy group that you have selected on this page.

Allow Invoice Owners in group to create requests and change vendors:

Can create payment requests.

Can change vendors on assigned requests.