Shared:
Product Settings

Setup Guide for Concur Standard Edition

Last Revised: April 11, 2022

Applies to these SAP Concur solutions:

- ☒ Expense
  - ☐ Professional/Premium edition
  - ☒ Standard edition
- ☐ Travel
  - ☐ Professional/Premium edition
  - ☐ Standard edition
- ☒ Invoice
  - ☐ Professional/Premium edition
  - ☒ Standard edition
- ☒ Request
  - ☐ Professional/Premium edition
  - ☒ Standard edition

Table of Contents

Revision History

Date	Notes/Comments/Changes
Aprl 11, 2022	Added information about Basic and Advanced views.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
December 17, 2021	Updated document title from "Overview" to "Product Settings". Revised tables. General updates to support recent changes to the Product Settings page.
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
March 22, 2021	Updated "Company Cards" to "Payment Types" and updated images throughout.
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
December 19, 2019	Updated with new **Sign In** page images.
October 8, 2019	Update one instance of "payment request" to "invoice".
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
May 13, 2019	Updated procedures in the Resetting Your Password section. Removed the password hint feature from this section as it is no longer available.
February 12, 2019	Updated the copyright; no other changes; cover date not updated
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
March 14 2018	Updated the copyright; no other changes; cover date not updated
November 4 2017	Updated guide to include new **Product Settings** page, which replaces the Setup Wizard.
March 18 2017	Updated with menu option name change to access Setup Wizard.
December 15 2016	Changed copyright and cover; no other content changes.
November 20 2015	Updated graphics to reflect updated step names and instructional text where applicable.
October 16 2015	Added information about the Simple Setup Wizard. Removed Default Settings section because it duplicated information in the *Expense: Default Settings Setup Guide*. Updated graphics to reflect newly styled step numbers.

Date	Notes/Comments/Changes
January 22 2015	Removed information about two user interfaces; no other content changes.
January 16 2015	Updated the screen shots to the enhanced UI; no other content changes.
September 16 2014	Added information about two user interfaces; no other content changes.
May 16 2014	New document. (This content originated from the *Expense Setup Guide for Concur Standard*.)

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.

SAP Concur Standard Edition Product Settings

Section 1: Overview

This guide provides general information about the Product Settings page and the settings available to SAP Concur client administrators in Product Settings.

For more details about specific settings, this guide refers to the product documentation for the feature the setting applies to.

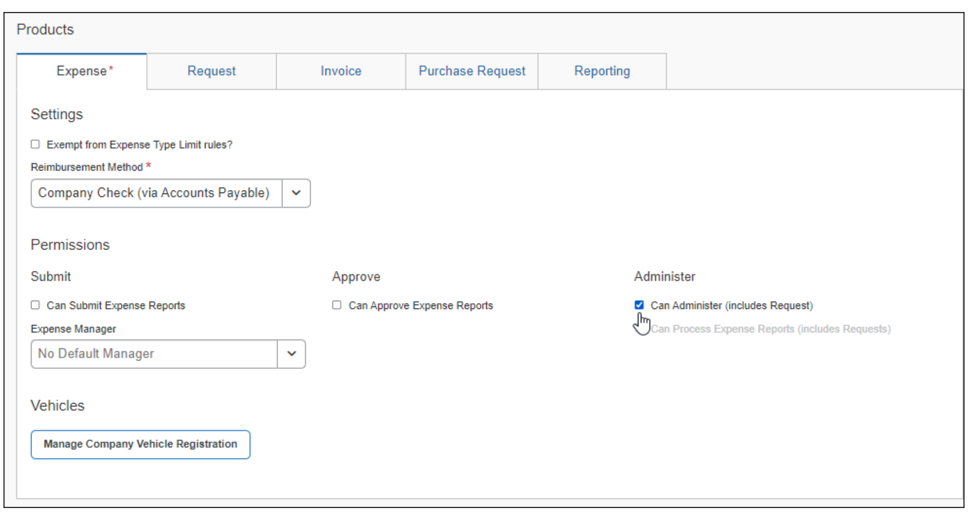
Because SAP Concur solutions are customizable, this guide might refer to settings that are not available in your company's configuration. For example:

- Your company might not use the product that the settings apply to.
- Some features are optional or require an additional purchase.
- Some features must be enabled by SAP Concur internal staff before they become available for configuration.
- Some settings are dependent on the existence of other settings.
- Some settings cannot be used in combination with other settings.

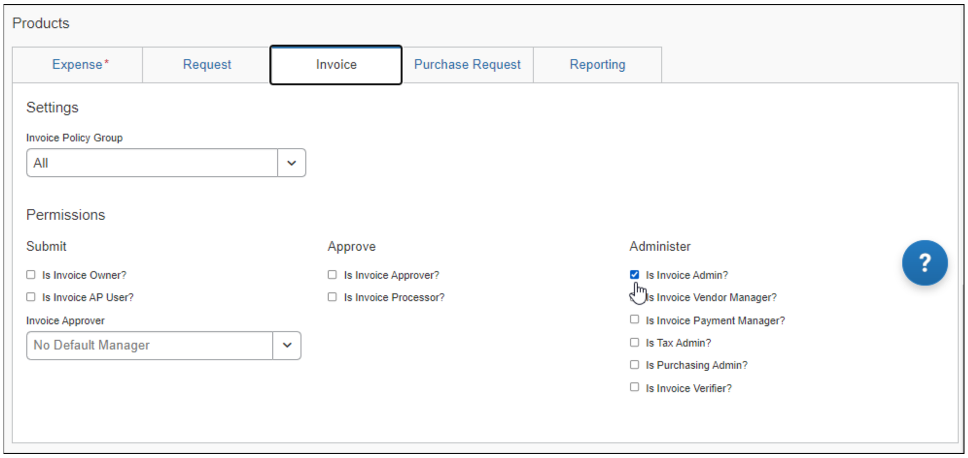
NOTE: Consult with your SAP Concur representative to determine which features best meet your company's needs.

Required Permissions

Concur Expense and Concur Request Product Settings are accessible to SAP Concur users who have been assigned the **Can Administer** permission on the **Expense** tab on their **User Account** page.



Concur Invoice Product Settings are accessible to SAP Concur users who have been assigned the **Is Invoice Admin** permission on the **Invoice** tab on their **User Account** page.

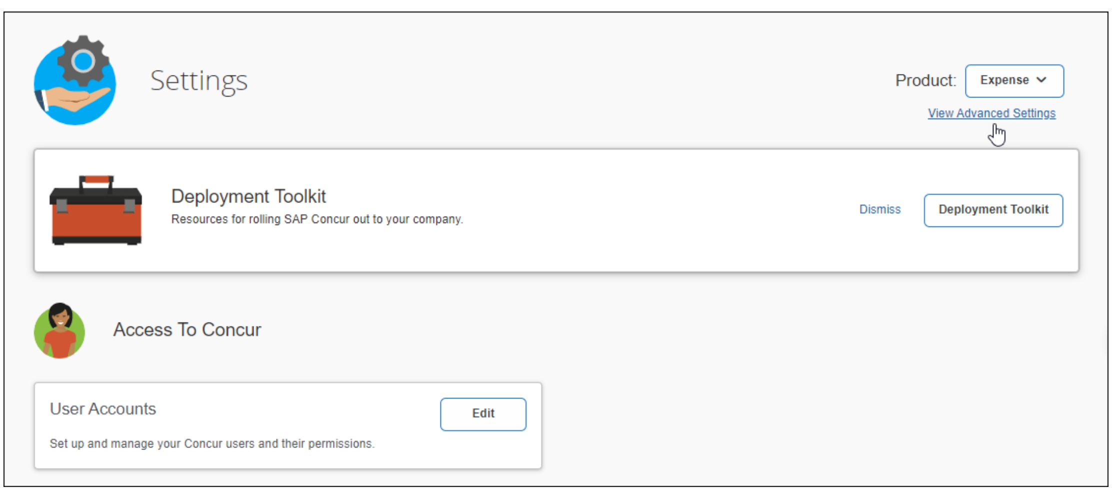


Some settings apply company-wide or are not product specific. Company-wide Product Settings are accessible to SAP Concur users who have been assigned either the **Can Administer** or the **Is Invoice Admin** permission.

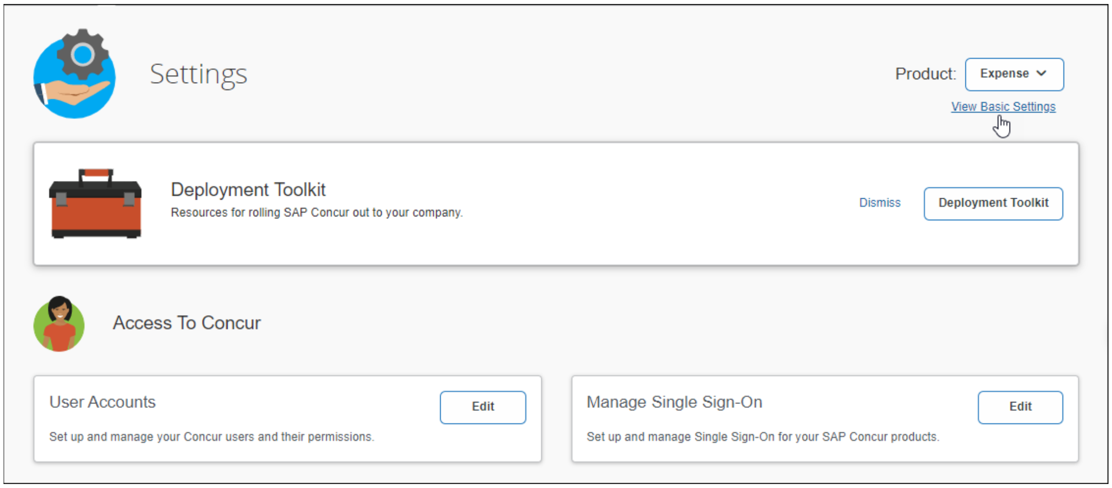
Section 2: Product Settings Groups and Tiles

Product Settings Basic and Advanced Views

When an admin navigates to Product Settings, they see either the **View Basic Settings** or **View Advanced Settings** link under the **Product** menu. The admin can click the link to toggle between the two views.



When the admin clicks **View Advanced Settings**, the advanced tiles appear on the **Product Settings** page, and the link under the **Product** menu changes to **View Basic Settings**. Clicking **View Basic Settings** hides advanced tiles.



NOTE: The settings tiles that appear in advanced view vary depending on your configuration.

In most cases, when an admin changes their view, if the admin signs out and back into SAP Concur solutions or changes pages within SAP Concur solutions, the previously selected view persists and the admin sees the selected view when they return to Product Settings.

For admins who have chosen not to accept concursolutions.com functional cookies or who clear cookies from their browser cache, the view will be reset to the default view the next time they sign in to SAP Concur solutions.

For information about how to enable and disable functional cookies, refer to the *Cookie Preferences and User Consent* fact sheet.

Product Settings Groups

Product Settings are accessed through tiles on the Product Settings page. Product Settings tiles are organized by group based on the functionality or feature the tile enables you to configure.

The individual setting tiles in Product Settings are grouped under the following headings:

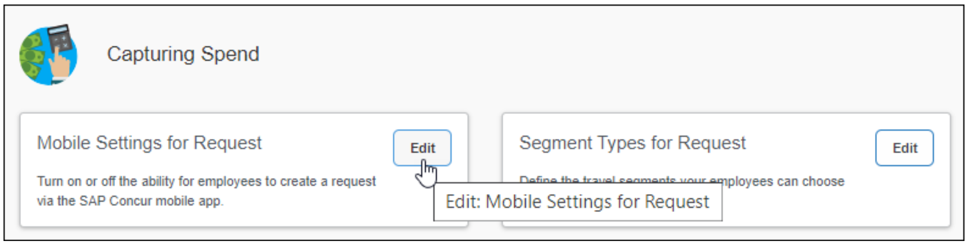
- Access to Concur
- Capturing Spend
- Connections
- Monitoring Spend
- Policy

- Reimbursements

NOTE: Depending on which SAP Concur product(s) you use and how your company is configured, you might not see all of the listed groups.

Product Settings Tiles

Product Settings are accessed through tiles on the Product Settings page.



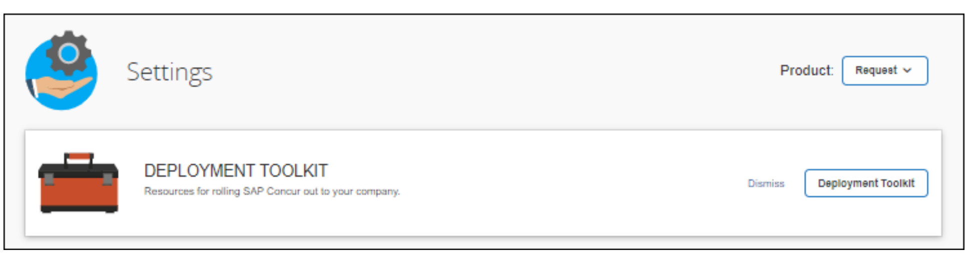
The Product Settings that appear in each group diepend on which products you use, which product is selected in the **Product** list, and how your company is configured.

Some Product Settings apply company-wide and are not product specific. Product settings that are company-wide appear on the Product Settings page regardless of which product is selected in the **Product** list.

For example, **User Accounts** settings apply company-wide, and the **User Accounts** tile appears in Product Settings regardless of which product is selected from the **Product** list.

Deployment Toolkit

The **Deployment Toolkit** tile appears at the top of Product Settings for all products. This tile provides a link to resources to help SAP Concur client administrators administer their SAP Concur solutions.



The

Deployment Toolkit tile can be permanently dismissed by clicking **Dismiss**. After dismissing the tile, the client admin can still access the **Deplyment Toolkit** for SAP Concur Standard Edition from the following page:

Concur Global Learning Services Standard Deployment Toolkit

Company-Wide Product Settings Tiles

The following table lists tiles that provide access to company-wide settings.

Depending on your configuration, you might not see all of these tiles. For example, the **Budget** tile provides access to configure the Budget feature. The Budge feature is a purchased service. If your company did not purchase this service, you will not see the **Budget** tile.

Group	Tile Name	Description and Guide
Access To Concur	User Accounts	**User Accounts** settings enable clients to add, remove, and manage SAP Concur users and their permissions. For more information, refer to the *Shared: Users Setup Guide.*
	Translations	**Translations** settings enable clients to specify how some terms in SAP Concur solutions are translated. For more information, refer to the *Shared: Localization Setup Guide.*
	Manage Single Sign-On	**Manage Single Sign-On** settings help clients to configure SSO through their organization to their SAP Concur solutions. For more information, refer to the *Shared: Single Sign-On Setup Guide.*
Capturing Spend	Custom Fields	**Custom Fields** settings enable clients to add custom fields to some forms to track data that is not captured by the default fields. For more information, refer to the *Shared: Custom Fields Setup Guide.*
Connections	Accounting	**Accounting** settings enable clients to add information about their company, specify their accounting software and enable alternate account codes. For more information, refer to the *Shared: Accounting Setup Guide.* **NOTE**: This page must be completed first when configuring product settings.

Group	Tile Name	Description and Guide
Monitoring Spend	Reporting	Depending on the company's configuration, **Reporting** settings enable clients to configure either **Analysis/Intelligence** or **Analytics Essentials.** For more information, refer to the *Shared: Reporting Configuration Setup Guide* or the *Standard Edition: Analytics Essentials and Analytics User Guide*.
	Budget	**Budget** settings enable clients to configure the Budget feature. The Budget feature enables clients who have purchased the service to set up and track budgets. For more information, refer to the *Shared: Budget Setup Guide.*
Policy	Policy Groups	**Policy Groups** settings enable clients to create policy groups which can be used to differentiate the expense and invoice requirements for different groups of users. For more information, refer to the *Shared: Policy Groups Setup Guide.*

Concur Expense-Specific Product Settings Tiles

When you select *Expense* in the **Product** list, you gain access to Expense-specific settings that enable you to:

- Establish how your organization accounts for expenses.
- Select the process that reports go through for approvals.
- Set the system response when it detects that the user is attempting to submit a request that is not in compliance with the set rules.
- Set differing reimbursement rates for personal and company car mileage.
- Establish how your organization reimburses employees for expenses.
- Manage company card programs and payment types.
- Customize the format of the export file that administrators receive when they close batches in Payment Manager.

Group	Tile Name	Relevant Guide
Capturing Spend	Payment Types	**Payment Types** settings enable clients to configure and manage credit card programs and payment types used to classify employee spending. For more information, refer to the *Concur Expense: Payment Types Setup Guide.*

Group	Tile Name	Relevant Guide
	Expense Types for Expenses	**Expense Types for Expenses** settings enable clients to establish how their organization accounts for expenses. For more information, refer to the *Concur Expense: Expense Types Setup Guide.*
	Mileage	**Mileage** settings enable clients to set differing reimbursement rates for personal and company car mileage and related information. For more information, refer to the *Concur Expense: Mileage Rates Setup Guide.*
	VAT	**VAT** settings enable clients to activate/ deactivate ValueAdded Tax (VAT) and select which expense types to place in the standard tax groups. For more information, refer to the *Concur Expense: Taxation Setup Guide.*
Connections	Expense File Export	**Expense File Export** settings enable clients to customize the format of the expense data extract file. This file is used to export data from Concur Expense if clients cannot sync directly using a financial connector. For more information, refer to the *Concur Expense: File Export Configuration Setup Guide.*
Policy	Expense Approvals	**Expense Approval** settings enable clients to select the process that expense reports go through for approvals. For more information, refer to the *Concur Expense: Approval Routing Setup Guide.*
	Travel Allowances	**Travel Allowances** settings enable clients to define how Concur Expense tracks travel allowances. For more information, refer to the *Concur Expense: Travel Allowance United States Setup Guide.*
	Expense Compliance	**Expense Compliance** settings enable clients to set rules for the expense reporting and receipt handling process. For more information, refer to the *Concur Expense: Compliance Controls Setup Guide.*
	Cash Advances	**Cash Advances** settings enable clients who use cash advance to configure cash advance settings for each country. For more information, refer to the *Concur Expense: Cash Advance Setup Guide.*

Group	Tile Name	Relevant Guide
Reimbursements	Employee Reimbursements	**Reimbursements** settings enable clients to define how their organization reimburses employees for expenses For more information, refer to the *Concur Expense: Employee Reimbursement Setup Guide.*

Concur Invoice-Specific Product Settings

When you select *Invoice* in the **Product** list, you gain access to Invoice-specific settings that enable you to:

- Establish how your organization accounts for expenses.
- Select the process that invoices go through for approvals.
- Set the system response when it detects that the user is attempting to submit a request that is not in compliance with the set rules.
- Configure options that apply to a specific policy group.
- Define how capture and verification will be managed.
- Customize the format of the export file that administrators receive when they close batches in Payment Manager.
- Configure purchase order matching rules.

If your company uses Purchase Request, you also gain access to settings that enable you to:

- Select the process that purchase requests go through for approvals.
- Set the system response when it detects that the user is attempting to submit a purchase request that is not in compliance with the set rules.
- Set up generation of purchase order numbers and define information to transmit with purchase orders.
- Set up units of measure.

Group	Tile Name	Relevant Guide
Access To Concur	Vendors	**Vendors** settings enable clients to add, view, and manage vendor information. For more information, refer to *Section 3: Manage Vendors* in the *Invoice Administration User Guide for Standard*.
Capturing Spend	Purchase Order Matching	**Purchase Order Matching** settings enable clients to identify and resolve matching exceptions before paying suppliers. For more information, refer to *Invoice: Purchase Order Matching User Guide*.

Group	Tile Name	Relevant Guide
	VAT Tax Codes for Invoices	**VAT Tax Codes for Invoices** settings enable clients with country packs to track VAT through the use of tax codes. For more information, refer to *Invoice: Taxation Setup Guide for Standard Edition*.
	PO Configuration	**PO Configuration** settings enable clients to generate purchase order numbers and add the information to transmit with the purchase orders. For more information, refer to *Invoice: Purchase Request and Purchase Order Setup Guide*.
	Expense Types for Invoices	**Expense Types for Invoices** settings enable clients to establish how their organization accounts for expenses. For more information, refer to *Invoice: Expense Types Setup Guide*.
	Company Locations	**Company Locations** settings enable clients to add, edit, delete, import, and export shipping and billing addresses. For more information, refer to *Invoice: Company Locations User Guide*.
	Invoice Policy Group Configuration	**Invoice Policy Group Configuration** settings enable clients to configure options that apply to users based on the policy group assigned to their user accounts. For more information, refer to *Invoice: Policy Group Configuration Setup Guide*.
	Capture Processing	**Capture Processing** settings enable clients to define the fields a processor enters when verifying scanned invoices and the email address for notifications about invoices with exceptions. For more information, refer to *Invoice: Capture Processing (Client-Managed) Setup Guide*.
	Units of Measure	**Units of Measure** settings enable clients to add, remove, and edit units of measure related to goods and services associated with purchase requests and purchase orders. For more information, refer to *Invoice: Purchase Request and Purchase Order Setup Guide*.
Connections	Invoice File Export	**Invoice File Export** settings enable clients to manage the export file that exports invoice data to a financial system. For more information, refer *Invoice: File Export Configuration*.

Group	Tile Name	Relevant Guide
Policy	Invoice Approvals	**Invoice Approvals** settings enable clients to select the process that invoices go through for approval. For more information, refer to *Invoice: Approval Routing Setup Guide*.
	Purchase Request Compliance	**Purchase Request Compliance** settings enable clients to configure how the system responds when user actions do not comply with defined rules. For more information, refer to *Invoice: Purchase Request and Purchase Order Setup Guide*.
	Invoice Compliance	**Invoice Compliance** settings enable clients to configure how the Concur system responds when user actions do not comply with defined rules. For more information, refer to *Invoice: Compliance Controls Setup Guide*.
	Purchase Request Approvals	**Purchase Request Approvals** settings enable clients to select the process that purchase requests go through for approval. For more information, refer to *Invoice: Purchase Request and Purchase Order Setup Guide*.

Concur Request-Specific Product Settings

When you select *Request* in the **Product** list, you gain access to Request-specific settings that enable you to:

- Establish which segment types users can select in their requests.
- Set whether users are required to enter segments or expected expenses in their requests.

Group	Tile Name	Relevant Guide
Capturing Spend	Segment Types for Request	**Segment Types for Request** settings enable clients to set the available request segments based on policy group. For more information, refer to *Concur Request: Segment Types Setup Guide*.
Policy	Request Compliance	**Request Compliance** settings enable clients to configure compliance rules for Concur Request. If a user submits a request that is out of compliance, they see an exception message. For more information, refer to *Concur Request: Compliance Controls Setup Guide*.

Section 3: Access Product Settings

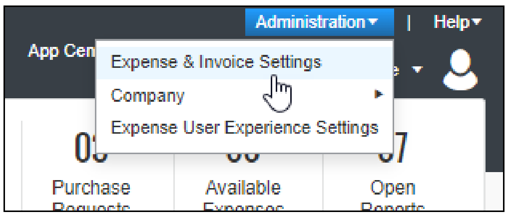
This section describes how to access Product Settings.

Accessing Product Settings

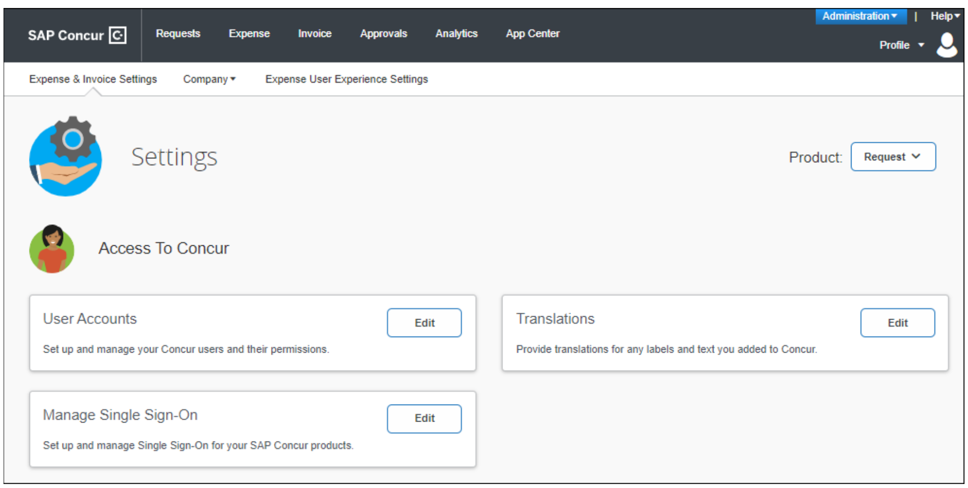
To access Product Settings:

1. Sign in to your SAP Concur site.

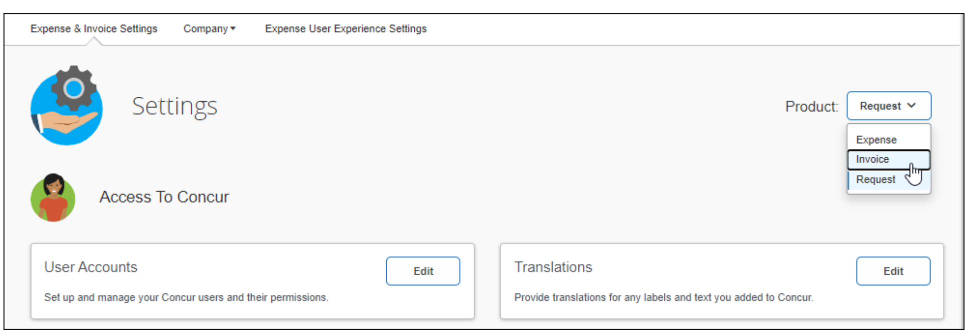
2. Click **Administration** > **Expense Settings** or **Expense & Invoice Settings** or **Invoice Settings**.



The Product Settings page appears.



3. Select your desired product in the **Product** list.



The company-wide and product-specific tiles for the product you selected from the **Product** list appear.