Shared: Policy Groups

Setup Guide for Concur Standard Edition

Last Revised: June 8, 2019

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
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## Revision History

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<th>Notes/Comments/Changes</th>
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<tr>
<td>April 27, 2020</td>
<td>Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated</td>
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<tr>
<td>January 15, 2020</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
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<td>Updated text and images throughout to reflect UI name change from &quot;Cost Tracking&quot; to &quot;Custom Fields&quot;.</td>
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<tr>
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<td>Updated guide to include new <strong>Product Settings</strong> page, which replaces the Setup Wizard.</td>
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<td>Updated graphics to reflect newly styled step numbers.</td>
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Policy Groups

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

Section 1: Overview

A policy group is a group of users that have a different expense or invoice policy. These users may need different expense types to choose from, or may have different expense limits. The Policy Groups page of Product Settings allows the administrator to create up to five policy groups for expense, and five for invoice. Once you have created the groups, you can assign them expense types and limits on other pages in Product Settings.

Example

You want to allow Sales to have unique expense types and allow Executives to have expense limits that exceed those of other departments.

Section 2: Configuration

Enable Policy Groups by Product

On the Policy Groups page, you can enable different policy groups for users.

Access the Policy Groups Page

To access the Policy Groups page:

1. Click Administration > Expense Settings or Expense & Invoice Settings or Invoice Settings.
Section 2: Configuration

2. In the **Product** list, click *Expense or Invoice or Request*.

3. In the **Capturing Spend** section, click *Show 1 Advanced Setting*.
4. Click **Policy Groups**.

The **Policy Groups** page appears.
Configure Policy Groups for Expense/Expense & Request

On the Expense/Expense & Request tab of the Policy Groups page, the admin creates up to 5 policy groups for each country.

Access the Expense/Expense & Request Tab

To access the Expense/Expense & Request tab:

1. Click Administration > Expense Settings or Expense & Invoice Settings or Invoice Settings.

2. In the Product list, click Expense or Invoice or Request.

3. In the Capturing Spend section, click Show Advanced Setting.
4. Click **Policy Groups**.

The **Policy Groups** page appears.
5. Click **Expense/Expense & Request** (tab).

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![Policy Groups](image1)

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**Create Policy Groups for Expense/Request**

- **To create policy groups:**

  1. (Optional) On the **Expense/Expense & Request** tab, from the **Select the desired country to create a new group** list, click the desired country.

  2. In the **Group Name** field, type a group name.

     **NOTE:** The default policy group will not be available once the admin has created one or more policy groups.

  3. For Request groups, enter the **Travel Agency Email address**. This email address receives all the email notifications sent to the travel agency for requests for users in this group.

     **NOTE:** The **Travel Agency Email address** field is the method for associating users with a travel agent. Even if all users are in one group, you should create a group for them in order to associate a travel agent with them, and assign them to the group on the **User Details** page.
For more information about the travel agency email notifications, refer to the *Shared: Default Configuration Settings Setup Guide*.

4. Click **Save**.

5. Repeat these steps until all desired groups have been created.

6. (Optional) If you intend to eventually populate your user list with an import file, then make a note of the system-generated **Group Code** assigned to each policy group.

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**Delete Policy Groups for Expense/Request**

- **To delete a policy group:**

  On the Expense/Expense & Request tab, click **Delete** for the policy group. You cannot delete a policy group if a user is assigned to it.

**Configure Policy Groups for Invoice**

On the Invoice page, the admin creates up to 5 policy groups.

**Access the Invoice Tab**

- **To access the Invoice tab:**

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

3. In the **Capturing Spend** section, click **Show Advanced Setting**.
4. Click **Policy Groups**.

The **Policy Groups** page appears.
5. Click **Invoice** (tab).

![Policy Groups](image)

**Create Policy Groups for Invoice**

- **To create policy groups:**
  1. On the **Invoice** tab, in the **Group Name** field, type a group name.
  2. Click **Save**.
  3. Repeat these steps until all desired groups have been created.

**TIP:** Make a note of the **Group Code** value so that, if you import users, you can assign the user to a group by the required code value in the spreadsheet you will use to import the user.

**NOTE:** On the **Users** page of Product Settings, you will be required to assign a user to a group or to all policy groups by selecting the specific group or the **All** option in the **Invoice Policy Group** list. If you have configured the Policy Groups feature for Invoice, you cannot add or edit a user without performing this step.
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 Invoice.

POLICY GROUPS AND COUNTRY PACKS

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 in the Select the desired country to create a new group list, and then create policy groups for that country.

For more information about country packs, refer to the Country Packs With VAT Client Fact Sheet.

Delete Policy Groups for Invoice

To delete a policy group:

On the Invoice tab, click Delete for the policy group. You cannot delete a policy group if a user is assigned to it.