Shared:
Policy Groups

Setup Guide for Concur Standard Edition

Last Revised: December 10, 2021

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

Date	Notes/Comments/Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
December 10, 2021	Updated **Product Settings** page instructions
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
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
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
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.
July 29 2017	Added information about country packs for Invoice.
July 8 2017	Updated the *Create Policy Groups for Expense/Request* section.
June 3 2017	Added information about the removal of the default policy group for Invoice and Expense.
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	Updated graphics to reflect newly styled step numbers.
June 12 2015	Added information about Request.
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* and the *Invoice Setup Guide for Concur Standard*.)

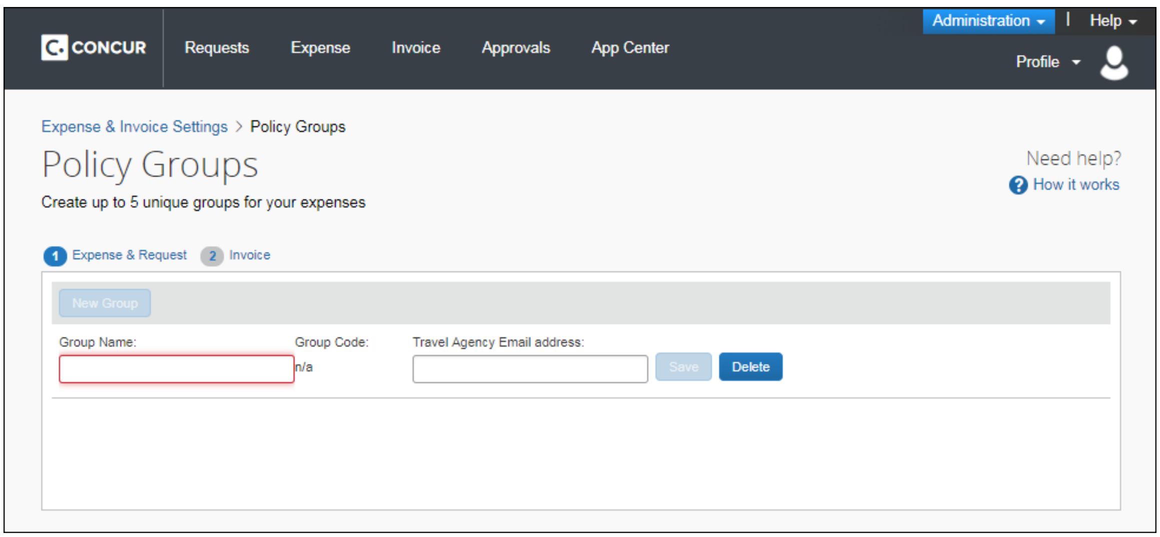
Policy Groups

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

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.

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

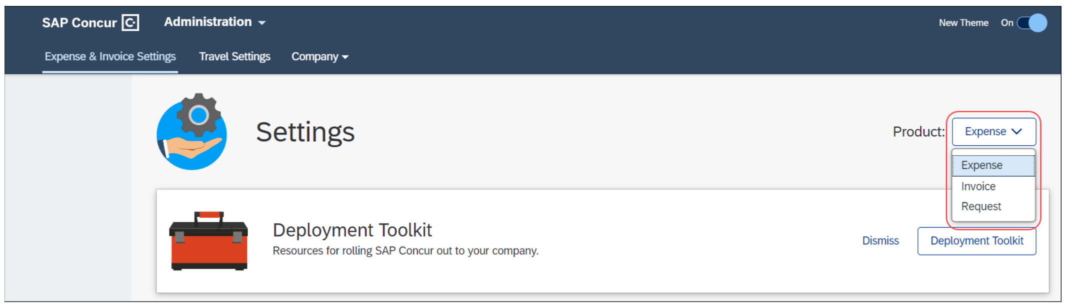
Enable Policy Groups by Product

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

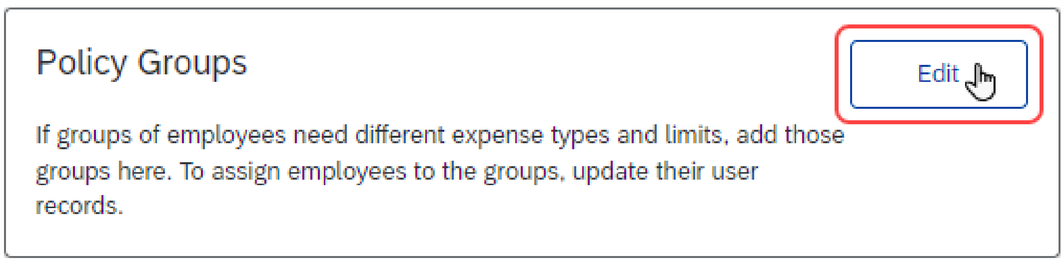
Access the Policy Groups Page

▶ *To access the Policy Groups page:*

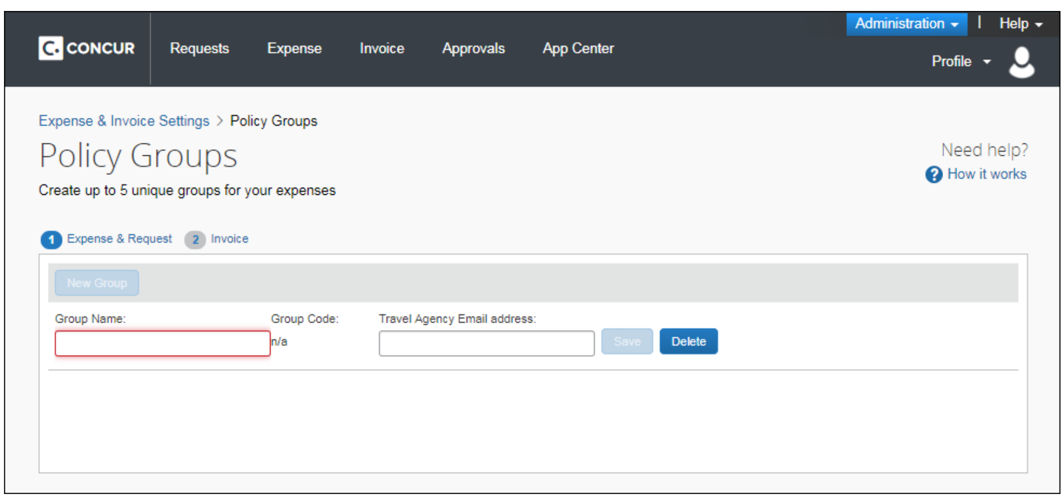
1. Click **Administration** > **Expense Settings** or **Expense & Invoice Settings** or **Invoice Settings**.
2. In the **Product** list, click *Expense* or *Invoice* or *Request*.



3. In the **Capturing Spend** section, on the **Policy Groups** tab, click **Edit**.



The **Policy Groups** page appears.



Configure Policy Groups for Expense/Expense & Request

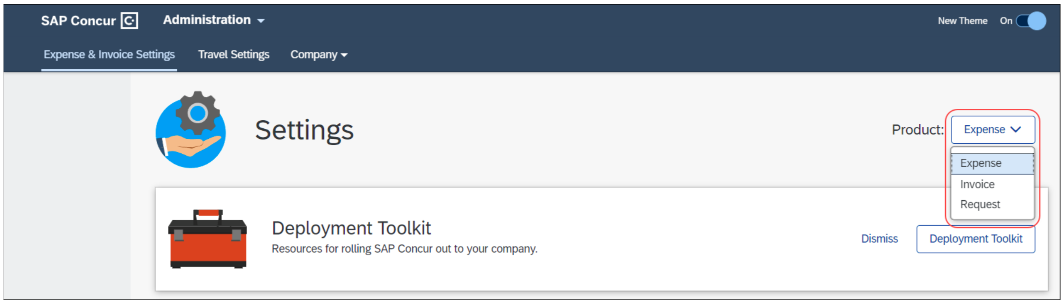
On the **Expense/Expense & Request** tab of the **Policy Groups** page, the admin creates up to 5 policy groups for each country.

Access the Expense/Expense & Request Tab

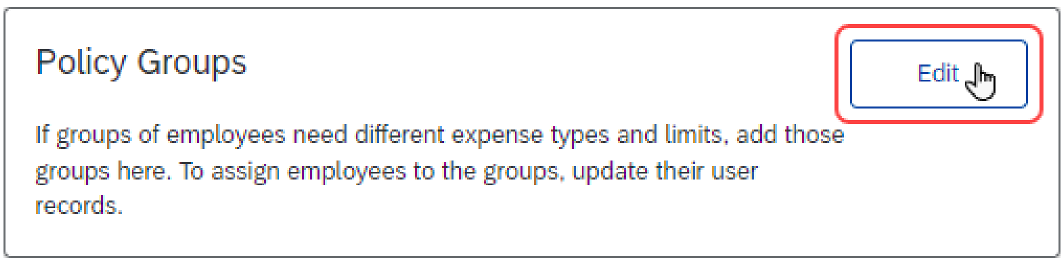
To access the Expense/Expense & Request tab:

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

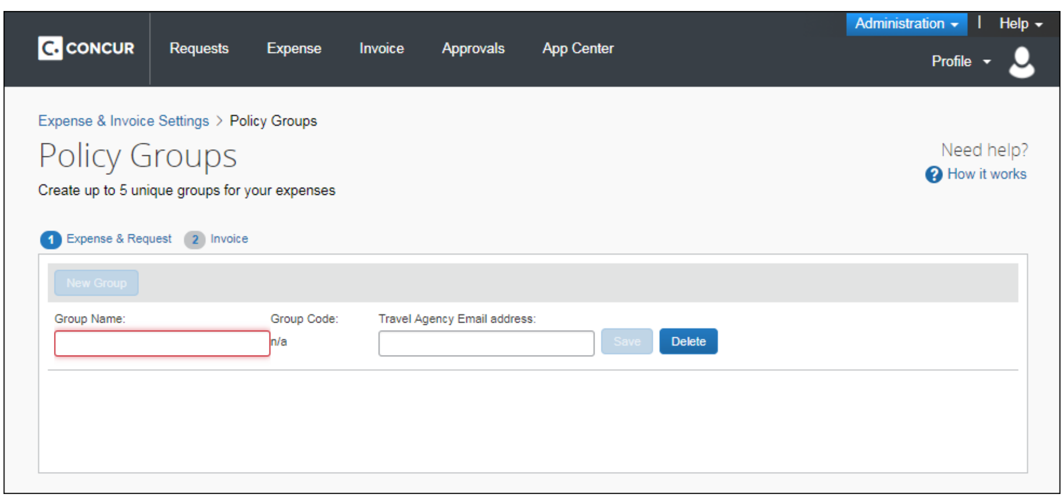
2. In the **Product** list, click *Expense* or *Invoice* or *Request*.



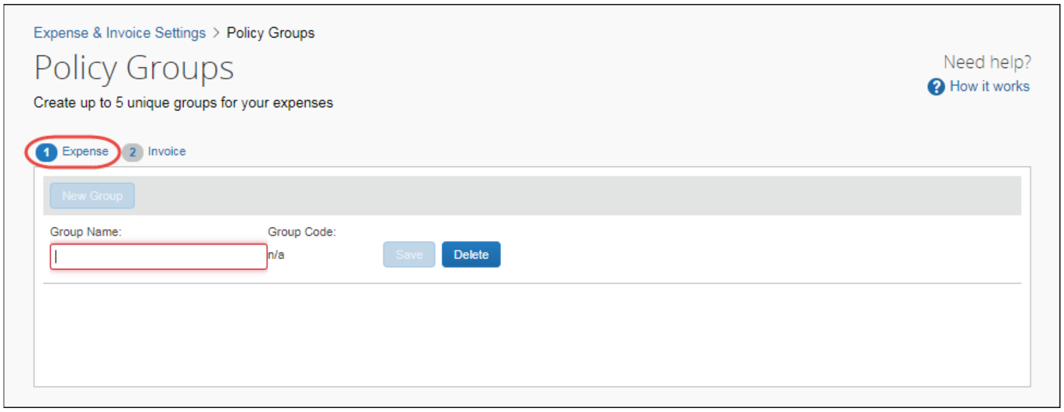
3. In the **Capturing Spend** section, on the **Policy Groups** tab, click **Edit**.

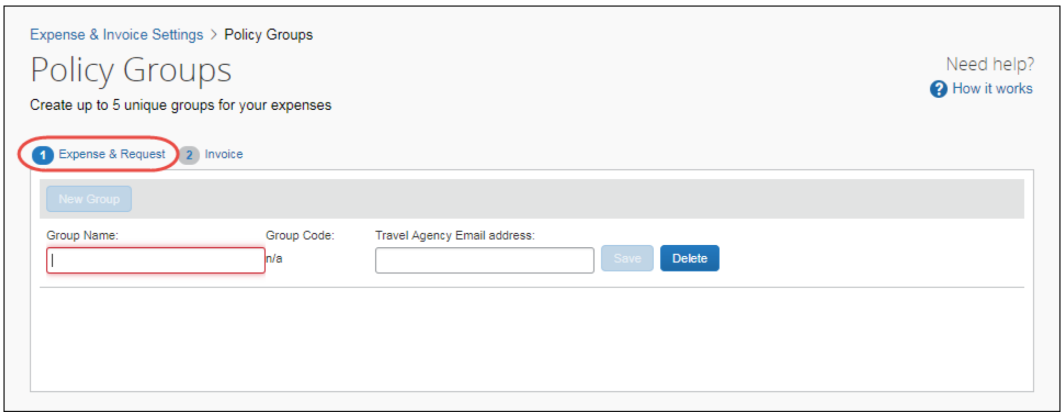


The **Policy Groups** page appears.



4. Click **Expense**/**Expense & Request** (tab).





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.

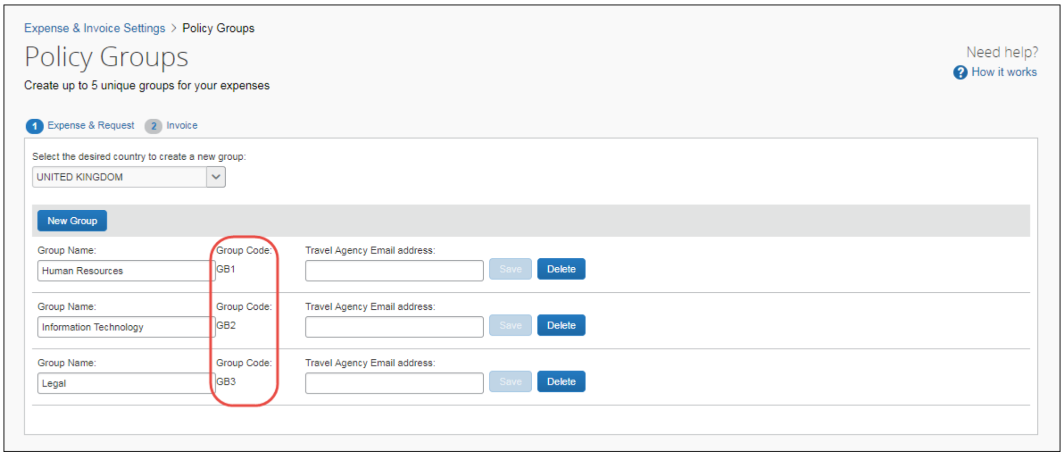
NOTE: The **Travel Agency Email address** field is the method for associating users with a travel agent. Even if all users are in one group, you should create a group for them in order to associate a travel agent with them, and assign them to the group on the **User Details** page.

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.



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

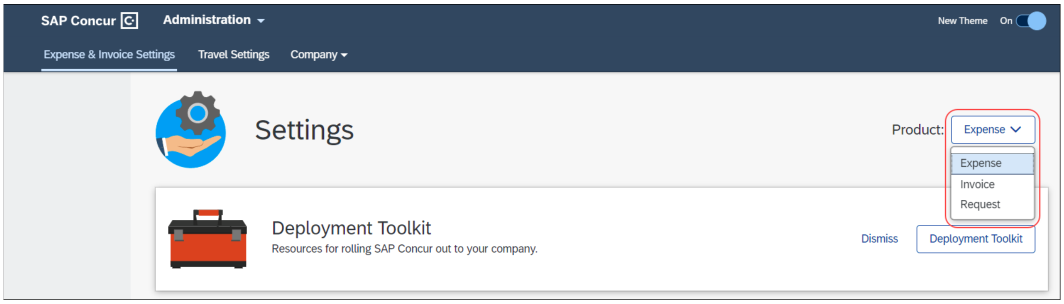
On the **Invoice** page, the admin creates up to 5 policy groups.

Access the Invoice Tab

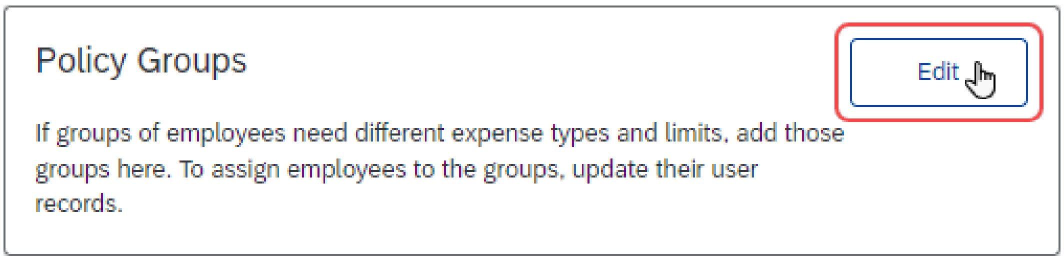
To access the Invoice tab:

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

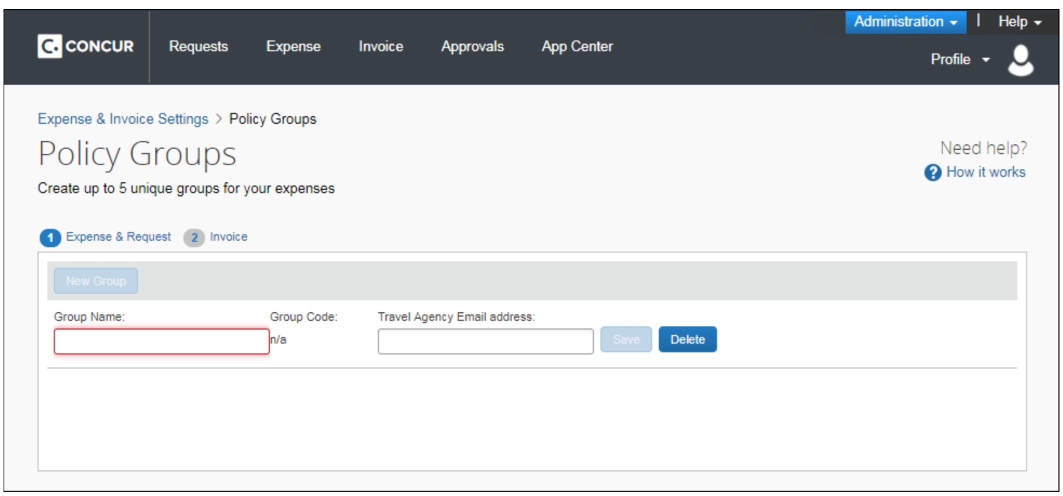
2. In the **Product** list, click *Expense* or *Invoice* or *Request*.



3. In the **Capturing Spend** section, on the **Policy Groups** tab, click **Edit**.



The **Policy Groups** page appears.

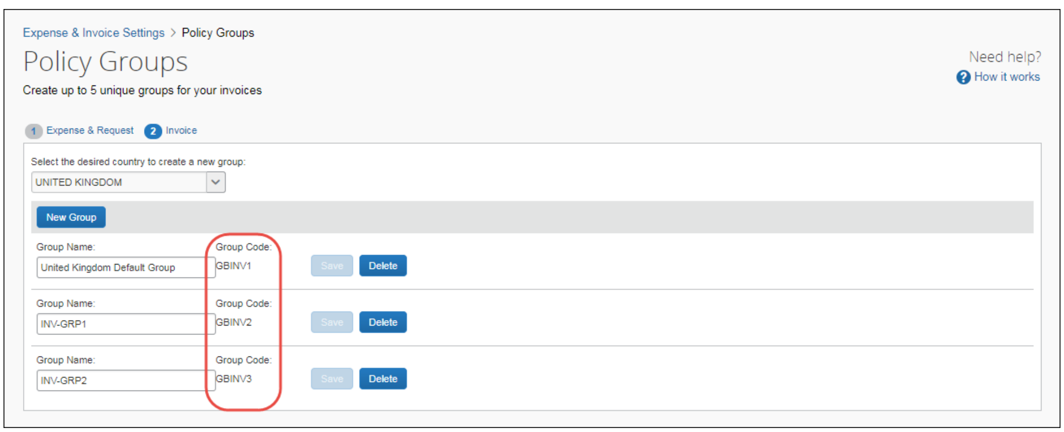


4. Click **Invoice** (tab).

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.



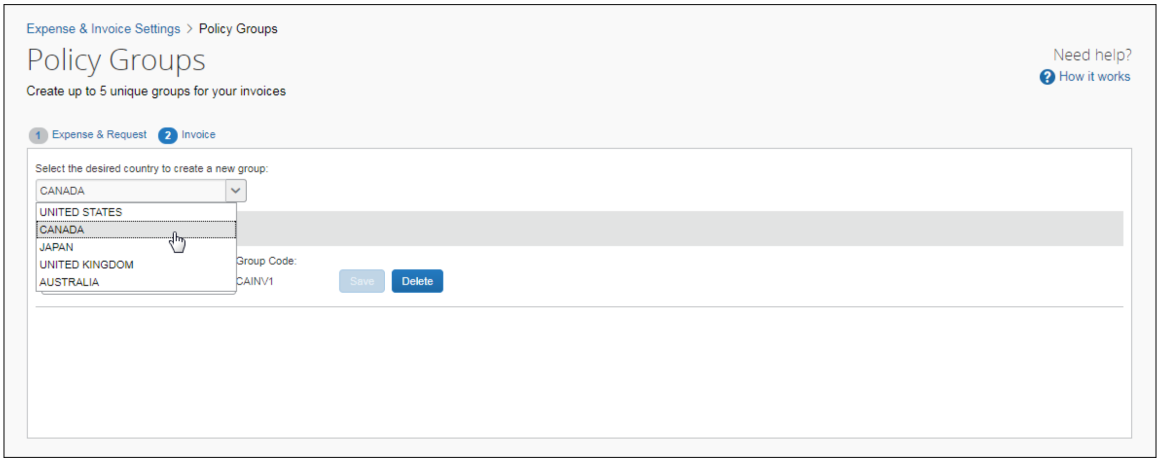
TIP: Make a note of the **Group Code** value so that, if you import users, you can assign the user to a group by the required code value in the spreadsheet you will use to import the user.

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.