

Concur Expense: Group Configurations for Expense

Setup Guide

Last Revised: November 14, 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

- Section 1: Permissions1**
- Section 2: Overview1**
- Section 3: Procedures:3**
 - Accessing the Group Configurations Tool3
 - Adding Groups4
 - Modifying Group Configurations 12
 - Changing the Basic Configuration 12
 - Changing the Active Policy..... 12
 - Editing Payment Types..... 13
 - Mapping Payment Types to Travel Reservation Types..... 14
 - Deleting Group Configurations 15

Revision History

| Date | Notes / Comments / Changes |
|-------------------|--|
| November 14, 2022 | Added information about the foreign exchange rate change based on the start or end date, or the default of the transaction date. |
| April 22, 2022 | Added clarification regarding the In Use indicator. |
| January 21, 2022 | Updated the copyright year; no other changes; cover date not updated |
| January 7, 2021 | Updated the copyright; added Concur to the cover page title; cover date not updated |
| September 1, 2020 | Added a note about the default payment <i>Cash</i> to the Editing Payment Types section. |
| May 1, 2020 | Updated a reference note in the table for the Adding Groups section. |
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| January 4, 2019 | Updated the copyright; no other changes; cover date not updated |
| November 17, 2018 | Added new list setting for trip-based Expense Assistant |
| April 4 2018 | Changed the check boxes on the front cover; no other changes; cover date not updated |
| January 5 2018 | Updated the copyright; no other changes; cover date not updated |
| July 18 2017 | Added a clarification note for Cash Advance expense types using Update Cash Advance exchange rate on expense entries enabled in Group Settings . |
| December 14 2016 | Changed copyright and cover; no other content changes. |
| May 13 2016 | Updated instances of he/she to they. |
| February 19 2016 | Updated page/guide reference from Company Paid Travel Options to new name, Travel Segments Payment Types. |
| April 10 2015 | Added the <i>Allow user to attach an image to a cash advance</i> setting. |
| February 20 2015 | Removed references to the current UI; added the <i>Utilize rich card data for receipt handling</i> setting. |
| January 16 2015 | Removed the TripIt Pro setting and updated the screen shots to the enhanced UI. |
| September 24 2014 | Added information about two user interfaces; no other content changes. |
| Jan 17 2014 | Addition of setting to specify cash advance form, updated Configuration for Group page layout. |
| May 17 2013 | Addition of setting allowing the cash advance exchange rate to automatically overwrite the existing exchange rate of the expense entry the advance is being associated with. |
| February 22 2013 | Addition of setting allowing a cash advance to be applied only to those entries that have a matching currency and no other |

| Date | Notes / Comments / Changes |
|-------------------|--|
| December 28 2012 | Made rebranding and/or copyright changes; no content changes |
| December 14 2012 | A default payment type can now be specified via the Group Configurations tool. |
| November 16 2012 | Addition of the <i>Allow user to link multiple cash advances to one expense report</i> to the Group Configurations dialog box. |
| February 2012 | Changed copyright; no content change |
| November 18 2011 | Clarified Cash Advance setting. |
| October 21 2011 | Added information about new setting Allow user to upload XML tax receipts to support Mexican digital CFD reimbursable receipt types. |
| August 22 2011 | Added information about TripIt Pro and Yodlee settings on the Configuration for Group page. |
| May 20 2011 | Updated information on mapping Travel Reservation Payment Types. |
| March 18 2011 | Updated content to the current user interface. |
| February 25 2011 | No content changes: Updated title of guide to show this document relates to Group Configurations > Expense  See <i>Shared: Group Configurations - Employee User Guide</i> for information about employee group configuration |
| December 31 2010 | Updated the copyright and made rebranding changes; no content changes |
| March 19 2010 | Added information about Attendee Types by group |
| December 2009 | Changed to stand-alone setup guide; no content change |
| Jun. 2008 (SU 32) | Added information about the two available user interfaces: ♦ <i>Classic</i> user interface ♦ <i>Current</i> user interface |
| Mar. 2008 (SU29) | Changed all references of travel request to authorization request |

Expense Group Configurations

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's Concur administrator.

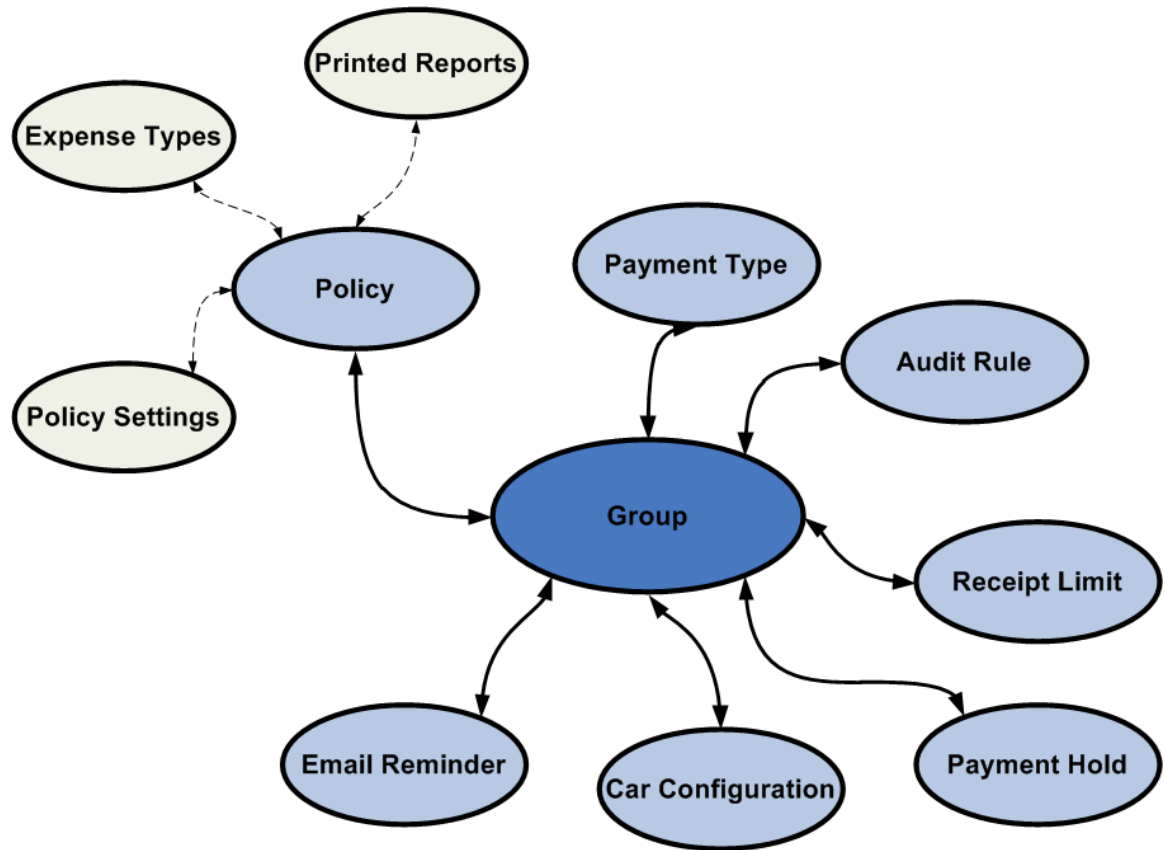
Also, the administrator should be aware that some of the tasks described in this guide can be completed only by Concur. In this case, the client must initiate a service request with Concur Client Support.

Section 2: Overview

A group is a collection of users that share the same set of policies and configuration data. Hierarchical Groups are created in a series of steps:

1. Determine how you want to divide employees into Groups for a feature, such as expense or reporting, and identify the data fields that differentiate employees into these Groups.
2. In the Feature Hierarchies section of Expense Admin, you define a hierarchy for the feature that comprises the data fields identified in the previous step and associate a source list with the hierarchy.
3. In List Management, you create the source list associated with the Feature Hierarchies. The process of creating this list is equivalent to creating Groups since each item in the source list is in effect a group.

The Expense tab of Group Configurations within the Expense Admin is used to identify and configure the groups necessary to provide employees with different policies, cash advance options, audit rules, payment types, car configurations, receipt limits, payment hold configurations, and email reminders.



If a group does not require different configurations of these items, then you can set the created configurations above those groups to be inheritable. For example, if Global Group>Sales Division uses payment types of Cash, VISA, and AMEX, and selects to have groups below it inherit that group's characteristics, then Global Group>Sales Division>Inside Sales will also have payment types of Cash, VISA, and AMEX. However, if you want the Inside Sales group to have only Cash and AMEX, then you would have to create a separate group configuration for those people.

When creating a group, you create a group name and define the path to that group, starting at the top level and drilling down to the appropriate group that requires a different configuration, such as Global Group>Sales Division>Inside Sales.

The Group Configurations tool is not visible if you have the Expense Configuration administrator (Restricted) role.



For more information on creating groups and basic group terminology, refer to the *Shared: Feature Hierarchies Setup Guide*.

The Employee tab of the Group Configurations page is used to associate configuration data with a group, such as which employee form applies to a group and whether or not the employee form is used by the groups below (inherited.) This relates to the employee hierarchy and is separate from the group configurations defined in this guide.



For more information on groups for employee hierarchies, refer to the *Shared: Group Configurations for Employees Setup Guide*.

Section 3: Procedures:

Accessing the Group Configurations Tool

The Expense tab of the Group Configurations page in Expense Admin controls group configurations for Expense.

An Expense Configuration administrator can view group configuration information for any Groups that they have rights to. The administrator's group access rights are defined in User Permissions when assigning the Expense Configuration administrator role. They will have rights for the group defined and any group below it.

► **To access the Group Configurations page:**

1. Click **Administration > Expense**.
2. Click **Group Configurations**. The **Expense** tab of the **Group Configurations** page appears.

| Group | Path | Policies | Payment Types | Attendee Types |
|-----------------|--------|----------|---------------|----------------|
| Global (in use) | Global | Modify | Modify | Modify |

NOTE: The **Group Configurations** page displays all group aware features within the product for Expense. You do not have to configure all of these configurations using the **Groups Configurations** page; however, in order to create a new group, you must edit the policies and payment types to define what policies and payment types are active for this group.

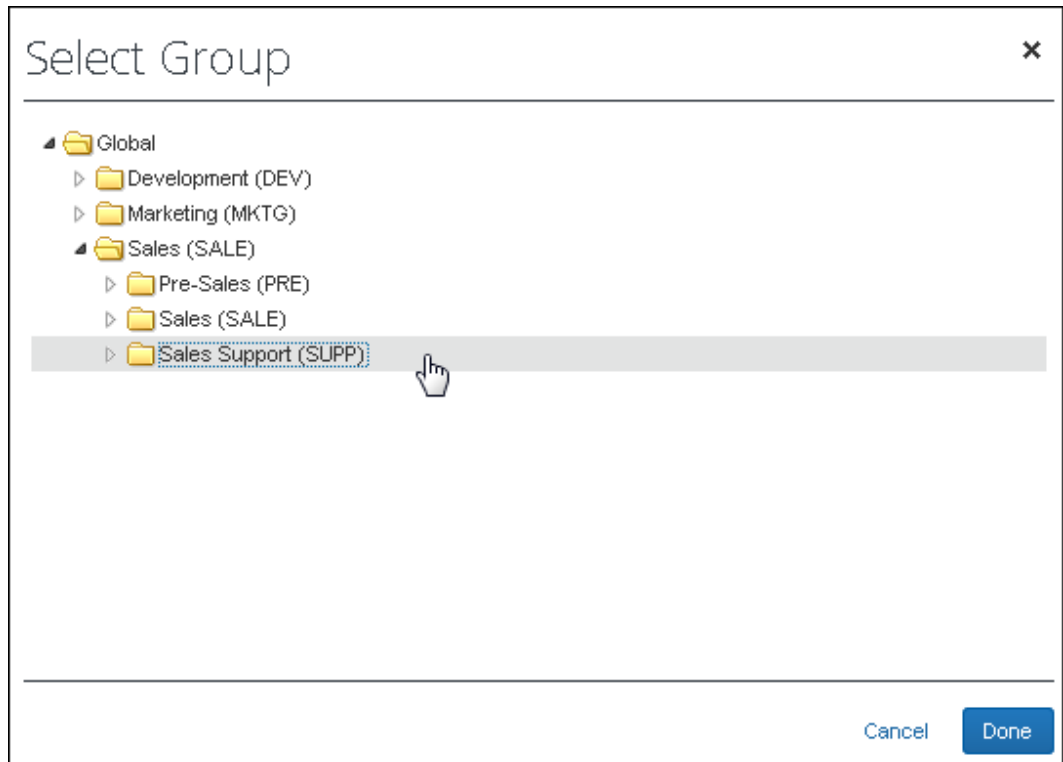
Adding Groups

You only create group configurations for groups where the policy, audit rules, payment types, car configurations, receipt limits, payment hold configurations, cash advance settings, and email reminders information is different for a particular group of employees. For example, if you have a hierarchy of Division>Department, and you want to create group configurations for Division A, Department A, and Department B. If there are more departments under Division A, but they can just use the Division A policies and the rest of the configuration data, then you do not need to create additional group configurations, such as Department C and D. When an employee creates an expense report, the policies that will appear will be either at that level or if those don't exist, then it would use the level above that group for its policy, which is Department A's. Allowing the inheritance of a group reduces the number of groups that you have to create.

You can only create group configurations for groups for which you are assigned rights and for groups below those groups. For example, if you are the Expense Configuration administrator for the Global Group>Europe>Sales, then you could only create group configurations for Sales and below, such as Inside Sales and Outside Sales. You could not create any group configurations for anything above you, such as Europe, United States, or Global Group. Neither could you create group configurations for groups in a different part of the hierarchy such as Global Group > United States > Sales.

▶ **To add an expense group configuration:**

1. On the **Expense** tab of the **Group Configurations** page, click **New**. The **Select Group** window appears.



NOTE: If you do not define a group then it will inherit from the next level that is defined. You *always* inherit the policy for undefined groups.

2. Select the desired group.
3. Click **Done**. The **Configuration for Group** window appears.

Section 3: Procedures:

Configuration for Group: Global ✕

Group: Global

Group Name:

Attendee List Form:

Digital Compliance Country/Region Rule:

For Expense Assistant, allow users to opt out or to use:

Allow user to register Yodlee Credit Cards (This setting cannot be revoked once granted)

Allow user to upload XML tax receipts.

Utilize rich card data for receipts handling

Enable Financial Integration

Enable Payroll Integration [?](#)

Enable Delta Posting [?](#)

Cash Advance Configurations

Cash Advance Workflow:

Cash Advance Form:

Allow user to carry a Cash Advance balance from one report to another

Allow user to link multiple cash advances to one expense report

Apply Cash Advance only to entries with matching currencies



Update Cash Advance exchange rate on expense entries

Allow user to attach an image to a cash advance


Cancel Save


4. Make selections as follows:

| Field | Description |
|--------------------|---|
| Group Name | Type a unique name that describes this group. When creating other configurations, you will see the group name and not the group path, so make sure it is understandable of what group is being defined. |
| Attendee List Form | Select the attendee form that users in this group will see. |


| Field | Description |
|--|---|
| Digital Compliance Country/Region Rule | Select the country-specific rule applicable to the handling of receipts in digital format. |
| For Expense Assistant, allow users to opt out or to use: | <p>Select how, or if, your user will use this feature.</p> <ul style="list-style-type: none"> • Monthly or By Trip – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both. (Default) • Monthly only – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user. • By Trip only – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user. • None – Expense Assistant will not be available to users in the group. |
| Allow user to register Yodlee Credit Cards | <p>If you want the users in this group to be able to import personal card charges using Yodlee, select this check box. Select (enable) this check box for each applicable group to ensure that the appropriate payment type is active.</p> <p>NOTE: This setting cannot be reversed once you have enabled it for your users.</p> <p> For more information, refer to the <i>Expense: Payment Types Setup Guide</i> and the <i>Expense: Personal Card Import Setup Guide</i>.</p> |
| Allow user to upload XML tax receipts | <p>If your users work with the Mexico requirements that XML digital CFD format for reimbursable receipts be uploaded and stored for auditing purposes, leave this check box selected (default).</p> <p> Refer to the <i>Expense: Receipt Handling – Digital Tax Invoice Setup Guide</i> for more information.</p> |
| Utilize rich card data for receipt handling | <p>Select this check box to activate the feature.</p> <p>Concur identifies company card transactions that have rich data and then Concur automatically:</p> <ul style="list-style-type: none"> • Formats the transaction information into a receipt-like layout • Displays the formatted transaction information to users, approvers, and processors <p>Then, if this Utilize rich card data for receipts handling check box is selected, Concur images the formatted transaction information and attaches it to the user's expense report (attaches to an <i>existing</i> image PDF if there is one or creates a <i>new</i> image PDF if there is not an existing one) when the user submits the report</p> |

Section 3: Procedures:

| Field | Description |
|---|--|
| Enable Financial Integration | <p>Select to allow financial data to be shared between Concur Expense and SAP.</p> <p>NOTE: This setting must be enabled in order to use the Delta Posting setting.</p> |
| Foreign Currency Exchange Rate Basis Date | <p>Allows the Expense admin to set the foreign currency exchange rate based on one of the following three settings options:</p> <ul style="list-style-type: none"> • Transaction Date (Default): Date the expense was incurred • Report Start Date: Trip start date as entered in the Report header • Report End Date: Trip end date as entered in the Report header <p>NOTE: This setting should be changed from default behavior only in circumstances to meet regulator requirements for an Expense Group in select countries or regions.</p> |
| Enable Payroll Integration | <p>Enable to connect Concur Expense with SAP Payroll. This integration is built on the SAP ICS (Integration with Concur Services) for SAP ECC, S/4HANA (on-premise), or SAP S/4HANA Cloud, and requires that clients have Financial Posting configured and utilized. The integration polls Concur Expense for eligible payroll documents and pulls them into SAP Payroll for processing. The admin uses options on the Payroll Integration screen to determine the payroll wage types among other settings.</p> |
| Enable Delta Posting | <p>Allows users to reopen an expense report and change the report, including custom fields. The level of changes allowed is based on the posting level, 1 – 3, each of which provides increasing levels of changes to the report.</p> <p>NOTE: The Enable Financial Integration setting must be enabled to use this feature.</p> <p> For more information, refer to the <i>Expense: Payroll Integration for SAP ECC, SAP S/4HANA, and SAP S/4HANA Cloud Setup Guide</i>, and the <i>Payroll Activation for Existing Customers</i> fact sheet.</p> |
| Delta Posting Level | <p>Choose a level based on the changes to allow the user:</p> <ul style="list-style-type: none"> • Level 1: Add and append receipt images and modify allocation and org unit fields • Level 2: All of above and • Level 3: All of above and modify number of attendees, amounts, add receipt images, and move entries between reports <p>NOTE: The Enable Financial Integration setting must be enabled to use this feature.</p> |
| Cash Advance Configurations | |

| Field | Description |
|--|--|
| Cash Advance Workflow | <p>Select the cash advance workflow to be used by this group during the cash advance request process. This workflow is defined on the Workflows page of Expense Admin. If only the default cash advance workflow appears, then no other workflows have been created.</p> <p>NOTE: This selection is optional; your company may not support cash advances, in which case this should be None.</p> |
| Cash Advance Form | <p>Select the cash advance form to be used by this group. The forms are configured on the Forms and Fields page of Expense Admin.</p> |
| Allow users to carry a cash advance balance from one report to another | <p>If you allow this group to request cash advances, then you may choose to select this check box.</p> <p>If you activate this option, an employee that has an outstanding cash advance balance for the report, meaning that they still need to return a cash advance to the company, can pay the cash advance back on future expense reports. If you do not activate this option, any employee who submits an expense report with a cash advance included must have the cash advance owed field at zero; otherwise, the report cannot be submitted.</p> <p>NOTE: The credit card cash advances might use this setting, depending on their payment type:</p> <ul style="list-style-type: none"> • For cards configured as IBCB, Expense never allows carry forward. • For cards configured as CBCP with offsets, Expense does allow the option to carry the advance forward and the application will look at this setting to see what the company has configured. |
| Allow user to link multiple cash advances to one expense report | <p>Select this check box to allow employees working within this Group to associate two or more cash advances to a single expense report.</p> |
| Apply Cash Advance only to entries with matching currencies | <p>Select this check box to allow cash advance to be applied only to those entries that have a matching currency and no other.</p> |
| Update Cash Advance exchange rate on expense entries | <p>Select this check box to reset the exchange rate on an expense entry to that of the cash advance it is being associated with.</p> <p> Refer to <i>Expense: Cash Advance Setup Guide</i> for more information.</p> <hr/> <p>NOTE: The exchange rate cannot be over written by the Cash Advance exchange rate for any expense that is partially approved or is a subordinate (child) expense even if Update Cash Advance exchange rate on expense entries is enabled in Group Settings.</p> |

| Field | Description |
|---|---|
| Allow user to attach an image to a cash advance | Select this check box to expose the Documents tab on the cash advance. The user can use the Documents tab to attach and delete images. The approver and Cash Advance administrator can also attach images to the cash advance using the Documents tab. |


 For more information on cash advances, refer to the *Expense: Cash Advance Setup Guide*. For more information on workflows, refer to the *Expense: Workflow - General Information Setup Guide*.

5. Click **Save**. The **Group Configurations** page appears.
6. Click **Modify** in the **Policies** column. The **Configuration for Group** window appears.

Configuration for Group: Global

| Policy Name | Last Modified By | Is Active For Group | Is Default Policy | Is Inheritable |
|----------------------|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| CA Expense Policy | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Standard Central ... | Global | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| UK Expense Policy | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| US Expense Aut... | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| US Expense Policy | Global | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| US Expense Polic... | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| US Expense Polic... | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Cancel Save

 For more information on viewing and editing a policy, refer to the *Expense: Policies Setup Guide*.

7. Make selections as follows:

| Field | Description |
|---------------------|--|
| Is Active for Group | Select or clear the check box make the policy active or inactive for the new group. NOTE: If a policy is marked as Active , it is available for inclusion into an expense report created by a member of the selected group. If a policy is marked as Inactive , it is not available. |

| Field | Description |
|-------------------|--|
| Is Default Policy | <p>Select the check box to make the selected policy the default for the group. This means that when an employee creates an expense report, the policy that appears as a default will be the one selected here.</p> <p>NOTE: You will be unable to select a policy as a default if it is marked Inactive. In addition, if there is only one Active policy listed for a group, it will automatically be set to Yes in the Is Default Policy column. It cannot be changed to No until another policy available for the group is marked Active.</p> |
| Is Inheritable | <p>Select or clear the check box to set whether groups below this group will inherit the group settings.</p> <p>NOTE: If a group below this group does not have a configuration associated with it, <i>and</i> this group configuration does not allow inheritance, then when an employee creates an expense report, it will inherit policies from the group above this group rather than from this group.</p> |

- Click **Save**. The **Group Configurations** page appears.
- Click **Modify** in the **Payment Types** column. The **Configuration for Group** window appears.

Configuration for Group: Global

| Payment Type | Is Active For Group | Default Payment Type |
|--------------------------|-------------------------------------|--------------------------|
| Cash | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CBCP | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Company Paid | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| IBCP | <input type="checkbox"/> | <input type="checkbox"/> |
| IBIP | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Pending Card Transaction | <input type="checkbox"/> | <input type="checkbox"/> |
| Personal | <input type="checkbox"/> | <input type="checkbox"/> |

Cancel Save

10. Select the check box for each payment type that should be available for inclusion in an expense report for this group.
11. *Optional:* Select a single check box under **Default Payment Type** for the active payment type that will appear as the default (at the top of the list) for the user.

NOTE: The **Is Active for Group** check box may be either read-only or editable, depending upon the status of the group above this group in the hierarchy. If the group above has marked the payment type as **Active** then the payment type is set as active for all groups below and cannot be edited. If the payment type for the group above is inactive, then the payment type can be set to either active or inactive for the group below.

Not all payment types can be made inactive, as they are required by Expense. These payment types appear as read-only text.

12. Click **Save**. The **Group Configurations** page appears.

Modifying Group Configurations

Group configurations are modified in three different locations.

Changing the Basic Configuration

▶ ***To view and edit basic information:***

1. Select the desired group configuration and click **Modify**. The **Configuration for Group** page appears.
2. Modify any information as required.
3. Click **Save**. The **Group Configurations** page appears.

Changing the Active Policy

You can modify policy settings on the **Expense** tab of the **Group Configurations** page.



For more information about policies, refer to the *Expense: Policies Setup Guide*.

► **To view and edit policy information:**

1. Click the **Modify** link in the **Policies** column for a list of policy files available to the group. The **Configuration for Group** page appears.

Configuration for Group: Global

| Policy Name | Last Modified By | Is Active For Group | Is Default Policy | Is Inheritable |
|----------------------|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| CA Expense Policy | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Standard Central ... | Global | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| UK Expense Policy | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| US Expense Aut... | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| US Expense Policy | Global | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| US Expense Polic... | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| US Expense Polic... | Global | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Cancel Save

2. Modify any information as required.
3. Click **Save**. The **Group Configurations** page appears.

Editing Payment Types

You can modify the payment type settings on the **Expense** tab of the **Group Configurations** page.

If a payment type is not marked active for the policy, it is not available for selection by employees in an expense report. For example, if the payment type of American Express is inactive, an employee cannot use American Express as a payment type in an expense report, even if that was the method of payment.

NOTE: The default payment type of *Cash* cannot be fully inactivated, as it will be used by the system in some circumstances regardless of status.

NOTE: Inactive payment types also cannot be mapped to travel reservation types used in Travel. Refer to *Mapping Payment Types to Travel Reservation Types* in this guide for additional information.

► **To view and edit payment type information:**

1. Click the **Modify** link in the **Payment Types** column. The **Configuration for Group** window appears.

Configuration for Group: Global

| Payment Type | Is Active For Group | Default Payment Type |
|--------------------------|-------------------------------------|--------------------------|
| Cash | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CBCP | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Company Paid | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| IBCP | <input type="checkbox"/> | <input type="checkbox"/> |
| IBIP | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Pending Card Transaction | <input type="checkbox"/> | <input type="checkbox"/> |
| Personal | <input type="checkbox"/> | <input type="checkbox"/> |

Cancel Save

2. Modify any information as required.
3. Click **Save**. The **Group Configurations** page appears.



For more information on viewing and editing payment types, refer to the *Expense: Payment Types Setup Guide*.

Mapping Payment Types to Travel Reservation Types

Travel is a service that employees can use to book travel. When an employee completes a trip, then the employee can click a link in Travel to create an expense report that already contains trip information, such as airfare, car rental, and lodging expenses. For a travel booking reservation type selected in Travel to map appropriately to a payment type in Expense, you must supply a mapping of the payment type. This mapping is completed in the Travel Segments Payment Types page in Expense Admin.



Refer to the *Expense: Travel Segments Payment Types Setup Guide* for more information.

Deleting Group Configurations

Once a group configuration is deleted, the employees contained within that group inherit the policies of the group above in the hierarchy. If no policy has been defined at a higher level in the group hierarchy, then the policies and payment types of the Global Group apply.

NOTE: Although an Expense Configuration administrator can delete a group configuration, they cannot delete the group itself. Those values are based on the source list created in the system. Groups can be deleted only by deleting the corresponding list items in the Employee Groups List.

▶ **To delete a group configuration:**

1. On the **Group Configurations** page, select the desired group.
2. Click **Remove**. A confirmation dialog box appears.
3. Click **Yes**. The selected group configuration is deleted.

NOTE: In Use is an indicator that a group configuration is directly referred to within the overall configuration, and therefore cannot be deleted until that related configuration is updated. This does not indicate that users are assigned to the group.

Some common examples of related configuration would be Company News records or conditions within Audit Rules.
