

Quick Change: Adding and Editing Policies in Concur® TripLink



We've made it easier to update your travel policy.

Every time travel changes, travel policies change. And if you want your travelers to be able to follow those policies, you need to make sure Concur® TripLink is always up to date.

In just a few simple steps, we'll show you how.

Your Travel Policy Admin screen contains a section that applies to Concur TripLink itineraries – whether they're brought in through Triplt® Pro or through a Concur TripLink supplier. In it, you'll see the policy rules from which you can choose.

- Be sure to check these rules against your policy to make sure they're in line.
- If you use Concur® Travel, make sure you have the same controls selected for both tools.

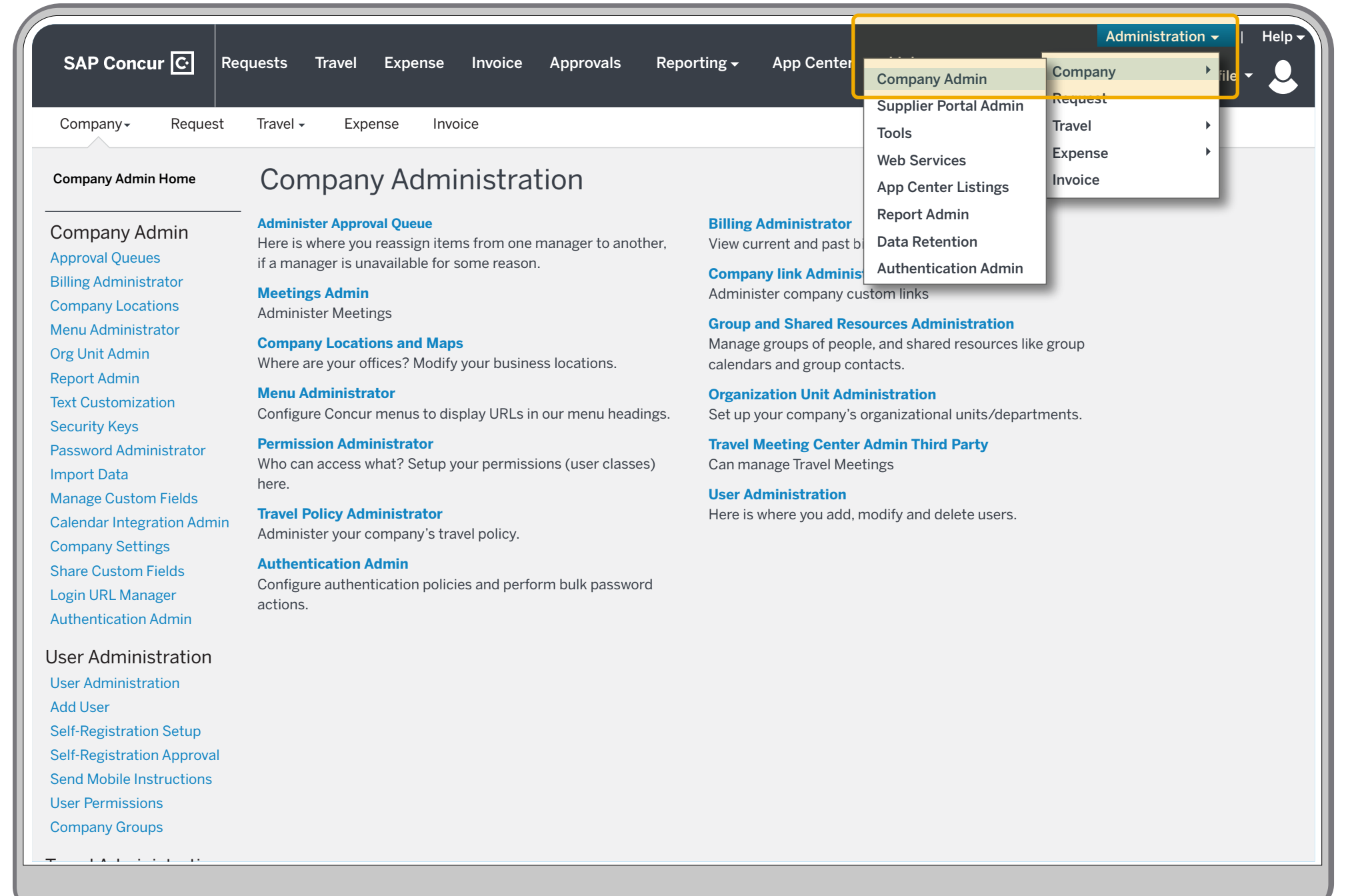
Adding and Editing Policies in Concur® TripLink

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Click **Administration**

↳ **Company**

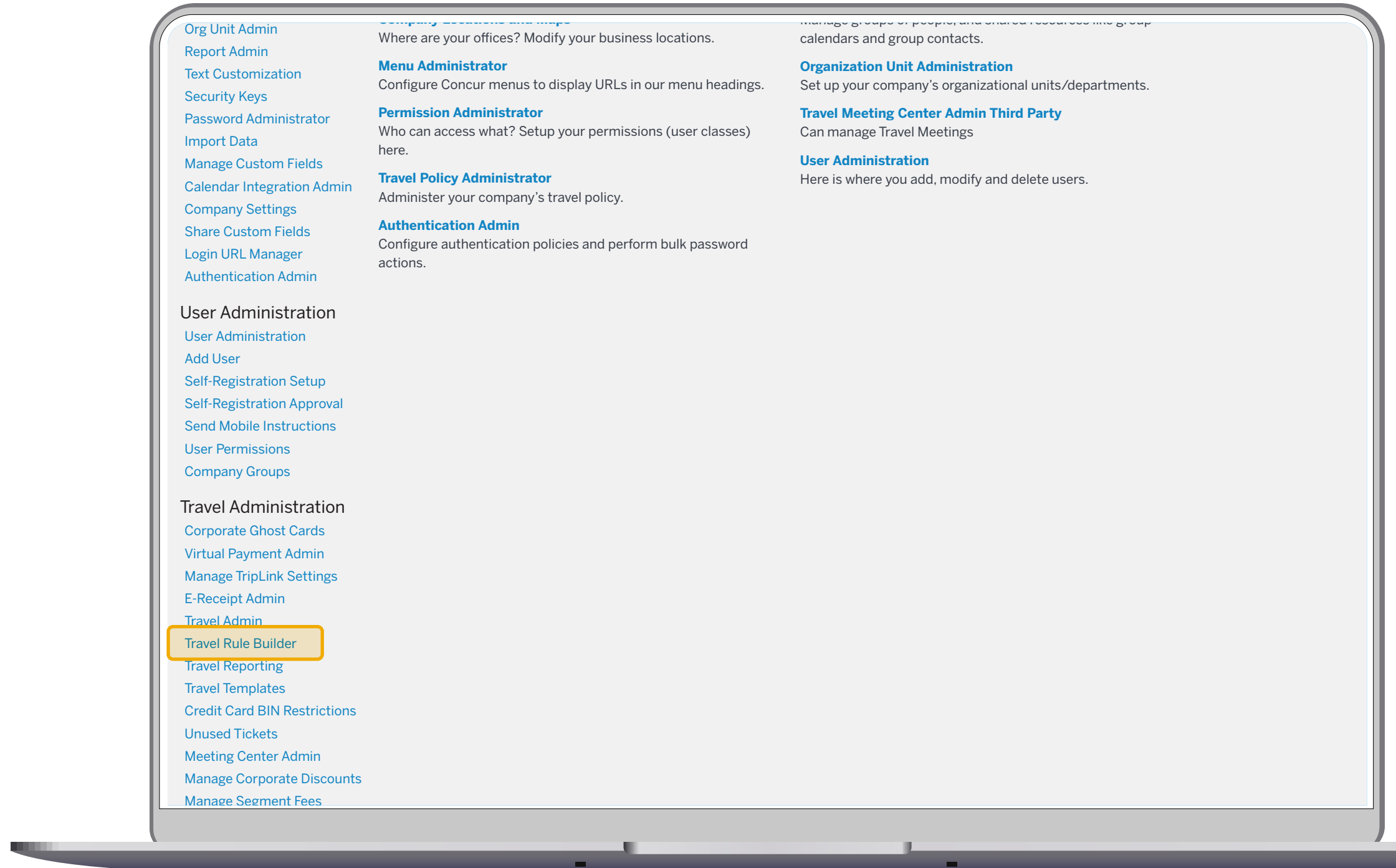
↳ **Company Admin**



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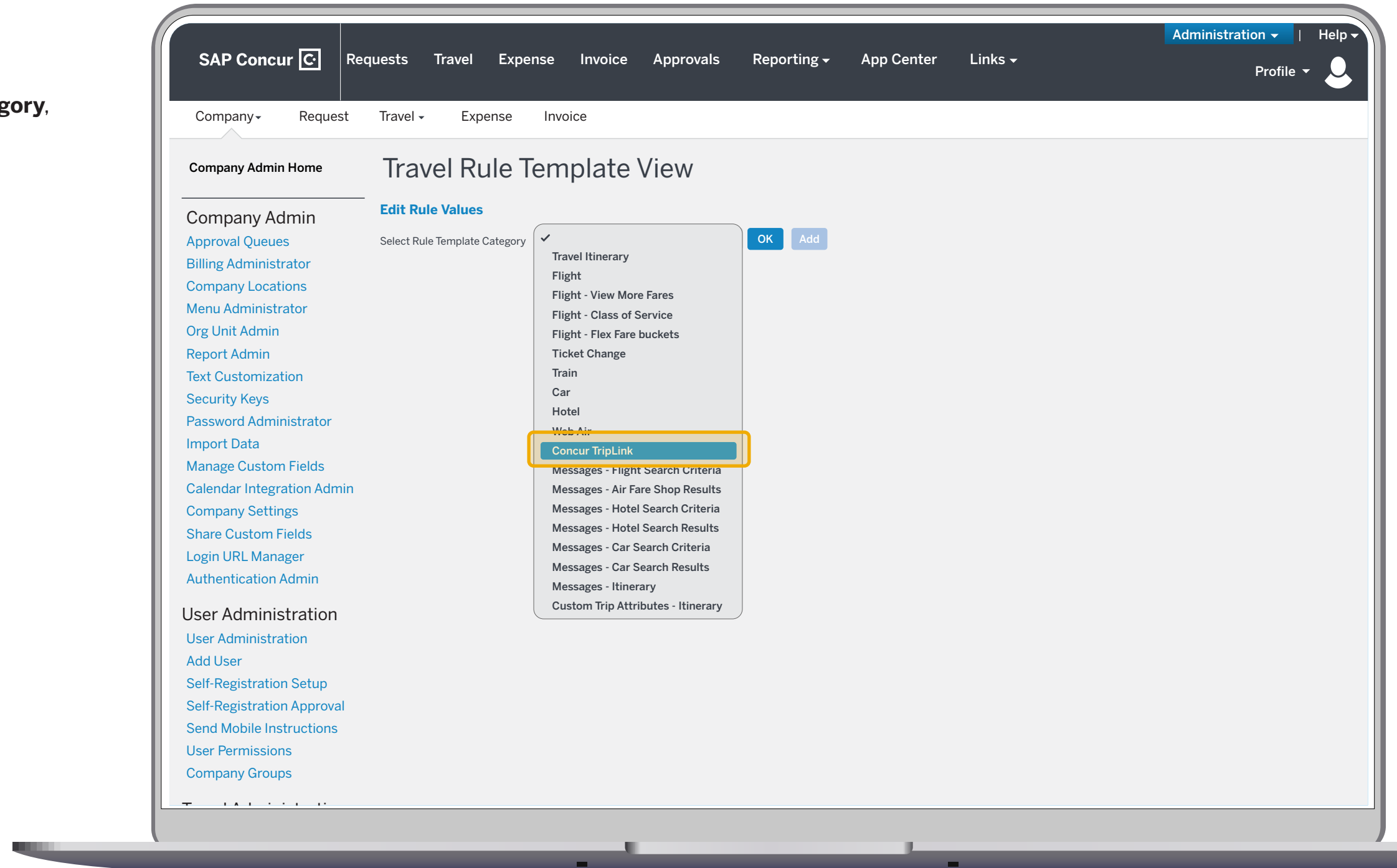
Scroll down, and click **Travel Rule Builder** (left menu).



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Under **Select Rule Template Category**, select **Concur TripLink**.



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Click **Add**.

The screenshot shows the SAP Concur TripLink interface for managing travel rule templates. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', and 'Links'. The main header shows 'Administration' and 'Help'. The left sidebar lists various administrative functions under 'Company Admin' and 'User Administration'. The main content area is titled 'Travel Rule Template View' and features an 'Edit Rule Values' section with a dropdown menu set to 'Concur TripLink' and two buttons: 'OK' and 'Add'. The 'Add' button is highlighted with a yellow box. Below this is a table listing existing rule templates.

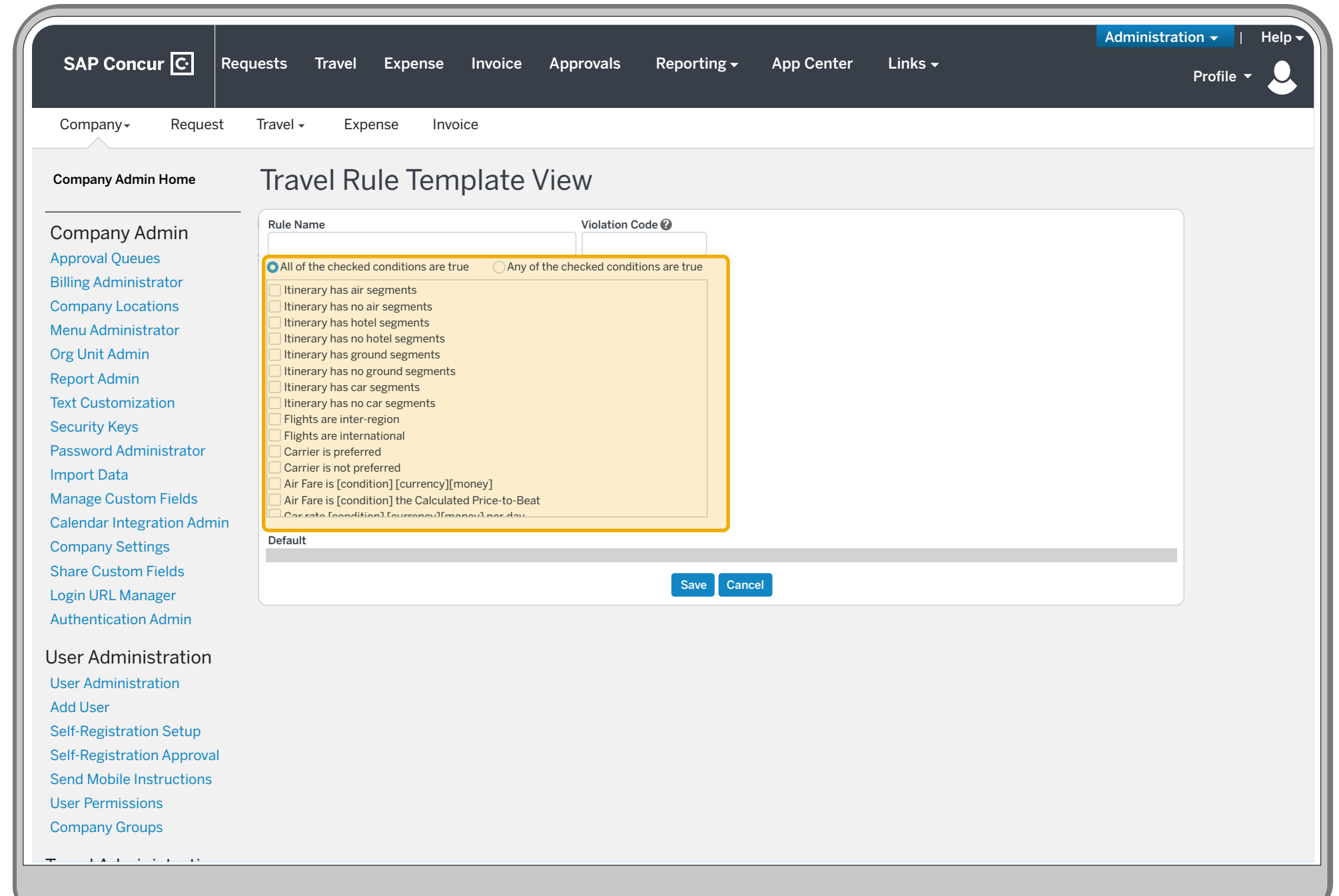
	Rule Name	Violation Code	Last Modified Date	Last Modified By
Edit Copy Delete	Hotel Open Booking		9/10/2013 10:16:31 AM	Admin, Tim
Edit Copy Delete	Open Booking Hotel Rate Ceiling		9/10/2013 10:17:36 AM	Admin, Tim
Edit Copy Delete	Non-preferred Car		10/10/2013 8:56:10 AM	Admin, Tim
Edit Copy Delete	International Travel	II	8/2/2022 1:159:40 PM	Admin, Fichan

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Enable your desired rules around Concur TripLink compliance.

Here, you can view a list of all the available attributes you can use to create a policy criteria. You can have one criteria or multiple—if you have multiple, make sure you highlight **All of the checked conditions are true**, or **Any of the checked conditions are true**.



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For example, you can create a rule that says a certain “Carrier or Hotel is not preferred.”

You can also save steps by selecting the desired rule classes (any or all) when you save this created policy rule.

The screenshot shows the SAP Concur TripLink interface for creating a Travel Rule Template. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', 'Links', 'Administration', and 'Help'. The main content area is titled 'Travel Rule Template View' and contains the following elements:

- Rule Name** and **Violation Code** input fields.
- Radio buttons for logic: All of the checked conditions are true, Any of the checked conditions are true.
- Checkboxes for rule conditions:
 - Air Fare is [condition] the Calculated Price-to-Beat
 - Car rate [condition] [currency][money] per day
 - Car vendor is not preferred
 - Car vendor is preferred
 - Hotel rate is [condition] [currency][hotelrate]
 - Hotel Rate is [condition] the price-to-beat
 - Hotel stay [condition] [NumNights] nights
 - Hotel chain is preferred
 - Hotel chain is not preferred
 - Hotel property is preferred
 - Hotel property is not preferred
 - All trips
 - Trip duration [condition] [DaysLong] days
 - Total Itinerary cost is [condition] [currency][money] Allowed Itinerary Cost
 - Booking Source is [Source]
- Default** section: "You may provide default values where you wish. These default values may be overridden whenever this rule template is used." Below this, the selected conditions are listed: "Hotel chain is not preferred" and "Hotel property is not preferred".
- The following Rule Classes make use of this template. Select individual rule classes to cascade your updates to those instances.**
 - If you add new rule parts and wish to cascade your changes, you must provide default values for the new parts where applicable.
 - If you change default values, the new values will cascade to all selected rule classes.
 - If you delete this template, all selected rule classes will have their rule deleted.
 - We have pre-selected travel classes that use this template with the default values.
- Pre-selected rule classes (all checked):
 - Business Travel
 - Candidates
 - Conference
 - Conference-Cross
 - Contractor Travel
 - Emergency Response
 - JAK Distribution-Worldspan

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Once you create and save your rule in Travel Rule Builder, go to **Travel Admin**.

Company Admin

- Approval Queues
- Billing Administrator
- Company Locations
- Menu Administrator
- Org Unit Admin
- Report Admin
- Text Customization
- Security Keys
- Password Administrator
- Import Data
- Manage Custom Fields
- Calendar Integration Admin
- Company Settings
- Share Custom Fields
- Login URL Manager
- Authentication Admin

User Administration

- User Administration
- Add User
- Self-Registration Setup
- Self-Registration Approval
- Send Mobile Instructions
- User Permissions
- Company Groups

Travel Administration

- Corporate Ghost Cards
- Virtual Payment Admin
- Manage TripLink Settings
- E-Receipt Admin
- Travel Admin**
- Travel Rule Builder
- Travel Reporting

Edit Rule Values

Select Rule Template Category:

	Rule Name	Violation Code	Last Modified Date	Last Modified By
<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>	Hotel Open Booking		9/10/2013 10:16:31 AM	Admin, Tim
<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>	Open Booking Hotel Rate Ceiling		9/10/2013 10:17:36 AM	Admin, Tim
<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>	Non-preferred Car		10/10/2013 8:56:10 AM	Admin, Tim
<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>	International Travel	II	8/2/2022 1:159:40 PM	Admin, Fichan

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In Travel Admin, click the dropdown and select the **Rule Class** (e.g. Product Development, Sales, etc.).

The screenshot displays the SAP Concur Travel Policy Administration interface. The top navigation bar includes 'SAP Concur' and various menu items like 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', and 'Links'. The main content area is titled 'Travel Policy Administration' and features a sidebar with 'Company Admin Home' and 'Company Admin' sections. The 'Rule Class (Edit Classes)' dropdown menu is highlighted with a yellow box, showing 'Product Development' selected. A 'Save' button and 'Clone Rules' link are visible next to the dropdown. A list of categories such as 'Travel Itinerary', 'Flight', 'Ticket Change', and 'Train' is shown, each with a 'No Rules Enabled' status. A large yellow arrow points from the dropdown menu to a detailed list of rule classes, which is also highlighted with a yellow box. This list includes categories like 'India Default', 'Anybiz Air\$Def Request - Gateway - Tony Camp', 'TC Air&Def_Request Gateway', 'Anybiz Air&Def - Gateway', 'JL Air&Def Gateway', 'Anybiz Air&Def REQUEST - Gateway', 'BK Air&Def_Request Gateway', 'BK Simple_Air&Def_Request Gateway', 'JL Air&Def_Request Gateway', 'td Air&Def_Request Gateway', 'AnyBiz APA - Gateway', 'APA Default', 'APA Simple', 'Australia Default', 'AnyBiz Canada - Gateway', 'Basic_CAN', 'Canada', 'Canada Manufacturing', 'Canada Sales', 'Default_CAN', 'Anybiz Cross Sabre - Gateway', 'Conference-Cross', 'Personal Travel_Cross', 'Training-Cross', 'Anybiz Cross Work Stoppage - Gateway', 'Emergency Response', 'Anybiz DoD', 'KB Request US DoD', and 'Request - Dept of Defense'.

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Then scroll to **Concur TripLink** and click **(Edit)**.

The screenshot displays the 'Travel Policy Administration' interface. On the left is a sidebar with the following sections:

- Company Admin Home**
- Company Admin**
 - Approval Queues
 - Billing Administrator
 - Company Locations
 - Menu Administrator
 - Org Unit Admin
 - Report Admin
 - Text Customization
 - Security Keys
 - Password Administrator
 - Import Data
 - Manage Custom Fields
 - Calendar Integration Admin
 - Company Settings
 - Share Custom Fields
 - Login URL Manager
 - Authentication Admin
- User Administration**
 - User Administration
 - Add User
 - Self-Registration Setup
 - Self-Registration Approval
 - Send Mobile Instructions
 - User Permissions
 - Company Groups
- Travel Administration**
 - Corporate Ghost Cards
 - Virtual Payment Admin
 - Manage TripLink Settings
 - E-Receipt Admin
 - Travel Admin

The main content area is titled 'Travel Policy Administration' and includes a breadcrumb trail: 'Travel Policy > Policy Violation Reasons > Travelfusion Suppliers > Vendor FoLD Admin > Travel Vendor Exclusions > Custom Text > Regional Hotel Rates > Travel Alternatives'. Below this is a 'Rule Class (Edit Classes)' section with a dropdown menu set to 'Product Development' and buttons for 'Save', 'Clone Rules', and 'Track Changes'. A section titled 'Choose who will handle the approvals:' has radio buttons for 'Manager' (selected) and 'Designate Travel Approver', with a dropdown menu showing '1 Manager(s)'. The main area lists several policy categories, each with an '(Edit)' link and a status of 'No Rules Enabled':

- Travel Itinerary (Edit)
- Flight (Edit)
- Flight - View More Fares (Edit)
- Flight - Class of Service (Edit)
- Ticket Change (Edit)
- Train (Edit)
- Car (Edit)
- Hotel (Edit)
- Web Air (Edit)
- Concur TripLink (Edit)** (highlighted with a yellow box)
- Messages - Flight Search Criteria (Edit)

The 'Messages - Flight Search Criteria (Edit)' section includes the following list items:

- Flight is between airports and - Display in Popup
- Flights are international - Display in Popup
- Flight Arrival Country/Region is Colombia - Display in Popup

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To view the TripLink-specific criteria that you had previously set up, **enable your rule**, and **assign the action**.

To Recap: First, we set up the criteria in Travel Rule Builder, and here, we're assigning it to the rule class and setting the action to be applied/enforced.

The screenshot displays the SAP Concur Travel Policy Administration interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', and 'Links'. The user is logged in as 'Administration'.

The main content area is titled 'Travel Policy Administration' and shows a 'Rule Class (Edit Classes)' for 'Product Development'. The 'Concur TripLink' section is active, and a dropdown menu is open, highlighting the 'Require Pre-approval & Log' option. The menu also includes 'Require Pre-approval & Notify', 'Notify Manager', and 'Log For Reports'.

The rule configuration includes the following criteria and actions:

- Require Pre-approval & Log: Hotel chain is not preferred and - hotel property is not preferred. Message when matched: Out of policy for not using preferred hotel chain or contracted hotel property. Action: G - General.
- Require Pre-approval & Log: Hotel rate is greater than \$75.00. Message when matched: [Empty]. Action: G - General.
- Require Pre-approval & Log: Itinerary has car segments and - Car vendor is not preferred. Message when matched: [Empty]. Action: G - General.
- Require Pre-approval & Log: Itinerary has air segments and - Flights are international and - Booking Source is TripLink. Message when matched: [Empty]. Action: G - General.



Compliance is just that easy.

Make sure you check back often to keep Concur TripLink aligned with your travel strategies – and your travelers on top of changing policies.