

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.

1

Click Administration

└→ Company

└→ Company Admin

Company- Request	Travel - Expense Invoice	Supplier Portal A Tools
Company Admin Home	Company Administration	Web Services App Center Listi
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	 Administer Approval Queue Here is where you reassign items from one manager to another, if a manager is unavailable for some reason. Meetings Admin Administer Meetings Company Locations and Maps Where are your offices? Modify your business locations. Menu Administrator Configure Concur menus to display URLs in our menu headings. Permission Administrator Who can access what? Setup your permissions (user classes) here. Travel Policy Administrator Administer your company's travel policy. Authentication Admin Configure authentication policies and perform bulk password actions. 	Billing Administrator Report Administrator View current and pasta Data Retention Administer company custom links Authentication A Administer company custom links Group and Shared Resources Administration Manage groups of people, and shared resourcalendars and group contacts. Organization Unit Administration Set up your company's organizational units Travel Meeting Center Admin Third Party Can manage Travel Meetings User Administration Here is where you add, modify and delete u Here is

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

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

Travel Administration Corporate Ghost Cards Virtual Payment Admin Manage TripLink Settings

Credit Card BIN Restrictions

User Permissions Company Groups

E-Receipt Admin Travel Admin Travel Rule Builder Travel Reporting **Travel Templates**

Unused Tickets Meeting Center Admin Manage Corporate Discounts Manage Segment Fees

Where are your offices? Modify your business locations. Menu Administrator

Permission Administrator Who can access what? Setup your permissions (user classes) here.

Configure Concur menus to display URLs in our menu headings.

Travel Policy Administrator Administer your company's travel policy.

Authentication Admin Configure authentication policies and perform bulk password actions.

calendars and group contacts.

Organization Unit Administration Set up your company's organizational units/departments.

Travel Meeting Center Admin Third Party Can manage Travel Meetings

User Administration Here is where you add, modify and delete users.

3

Under Select Rule Template Category, select Concur TripLink.

Company- Request Travel - Expense Invoice Company Admin Home Travel Rule Category Company Admin Company Admin Select Rule Template Category C Add Billing Administrator Select Rule Template Category C Add Company Locations Select Rule Template Category C Add Report Admin Flight - Class of Service Flight - Class of Service Flight - Class of Service Password Administrator Corr Train Car Hotel Company Settings Share Custom Fields Messages - Flight Search Criteria Messages - Hotel Search Criteria Messages - Hotel Search Criteria Messages - Hotel Search Criteria Messages - Hotel Search Criteria Messages - Hotel Search Criteria Messages - Hotel Search Criteria Messages - Hotel Search Criteria Messages - Car Search Results Messages - Car Search Results Messages - Car Search Results Messages - Car Search Criteria Messages - Car Search Results Messages - Car Search Results Messages - Car Search Results Messages - Car Search Results Messages - Literary Messages - Car Search Results Messages - Literary Custom Trip	SAP Concur C Rec	quests Travel Expe	nse Invoice Approvals	Reporting -	App Center	Links
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4 Click Add.

SAP Concur 🖸 Red	quests Travel Expense	Invoice Approvals Reporting -	App Center	Links -
Company - Request	Travel - Expense Invoi	се		
Company Admin Home	Travel Rule Tem	olate View		
Company Admin Approval Queues Billing Administrator	Edit Rule Values Select Rule Template Category Conct	ır TripLink 🗸 OK 🛛 Add]	
Menu Administrator		Rule Name	Violation Code	Last N
Org Unit Admin		Hotel Open Booking		9/10/
Report Admin	Edit Copy Delete			0.207
Text Customization	Edit Copy Delete	Open Booking Hotel Rate Ceiling		9/10/
Security Keys	Edit Conv. Doloto	Non-preferred Car		10/10
Password Administrator	Eult Copy Delete			
Import Data	Edit Copy Delete	International Travel	Ш	8/2/2
Manage Custom Fields				
Company Settings				
Share Custom Fields				
Login URL Manager				
Authentication Admin				
lser Administration				
Add User				
Self-Registration Setup				
Self-Registration Approval				
Send Mobile Instructions				
User Permissions				
Company Groups				

Administration - | Help -

Profile 🔻

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ified Date	Last Modified By
.3 10:16:31 AM	Admin, Tim
.3 10:17:36 AM	Admin, Tim
13 8:56:10 AM	Admin, Tim
2 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**.

Company - Request	Travel - Expense Invoice
Company Admin Home	Travel Rule Template View
Company Admin	Rule Name Violation Code 🚱
Approval Queues	All of the checked conditions are true
Billing Administrator	☐ Itinerary has air segments
Company Locations	Itinerary has no air segments
Menu Administrator	Itinerary has notel segments
Org Unit Admin	Itinerary has ground segments
Report Admin	 Itinerary has no ground segments Itinerary has car segments
Text Customization	Itinerary has no car segments Flights are inter-region
Security Keys	Flights are international
Password Administrator	Carrier is preferred
mport Data	Air Fare is [condition] [currency][money]
Manage Custom Fields	Air Fare is [condition] the Calculated Price-to-Beat
Calendar Integration Admin	Default
Company Settings	
Share Custom Fields	Save Cancel
Authentication Aumin	
Jser Administration	
User Administration	
Add User	
Self-Registration Setup	
Self-Registration Approval	
Send Mobile Instructions	
User Permissions	
Company Groups	



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.

SAP Concur C	uests Travel Expense Invoice Approvals Reporting - App Center Links -
Company - Request	Travel - Expense Invoice
Company Admin Home	Travel Rule Template View
Company Admin	Rule Name Violation Code 🚱
Approval Queues	
Billing Administrator	• All of the checked conditions are true
Company Locations	Air Fare is [condition] the Calculated Price-to-Beat
Monu Administrator	Car vendor is not preferred
Org Unit Admin	Car vendor is preferred
Deport Admin	Hotel Rate is [condition] [currency][notelrate]
Report Aumin	Hotel stay [condition] [NumNights] nights
Text Customization	Vertex chain is not preferred
Security Keys	Hotel property is preferred
Password Administrator	Hotel property is not preferred
Import Data	Trip duration [condition] [DaysLong] days
Manage Custom Fields	Total Itinerary cost is [condition] [currency][money] Allowed Itinerary Cost
Calendar Integration Admin	Default
Company Settings	Delauit You may provide default values where you wich. These default values may be overridden whenever this rule template is used
Share Custom Fields	fou may provide deladit values where you wish. These deladit values may be overheden whenever this rule template is used.
Login URL Manager	Hotel chain is not preferred Hotel property is not preferred
Authentication Admin	
User Administration	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 defualt values for hte new parts where applicable.
User Administration	If you change default values, the new values will cascade to all selected rule classes.
Add User	 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.
Self-Registration Setup	✓ Business Travel
Self-Registration Approval	✓ Candidtates
Send Mobile Instructions	Conference
User Permissions	Conference-Cross
Company Groups	
company croups	Emergency Response
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Once you create and save your rule in Trave Rule Builder, go to **Travel Admin**.

Approval Queues	Select Rule Template Category Concur	r TripLink 🗸 OK Add			
Billing Administrator					
Company Locations					
Menu Administrator		Rule Name	Violation Code	Last Modified Date	Last Modified
Org Unit Admin		Hotel Open Booking		9/10/2013 10:16:31 AM	Admin, Tim
Report Admin	Edit Copy Delete				
Text Customization	Edit Copy Delete	Open Booking Hotel Rate Ceiling		9/10/2013 10:17:36 AM	Admin, Tim
Security Keys		Non-preferred Car		10/10/2013 8:56:10 AM	Admin, Tim
Password Administrator	Edit Copy Delete	·			
Import Data	Edit Copy Delete	International Travel	II	8/2/2022 1:159:40 PM	Admin, Ficha
Manage Custom Fields					
Calendar Integration Admin					
Company Settings					
Share Custom Fields					
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					

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

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Request - Dept of Defense		KB Request US DoD
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Then scroll to **Concur TripLink** and click **(Edit)**.

Company Admin Home	Travel Policy Administration
Company Admin Approval Queues Billing Administrator	Travel Policy Policy Violation Reasons Travelfusion Suppliers Vendor FoID Admin Travel Vendor Exclusions Custom Text Regional Hotel Rates Rule Class (Edit Classes) Product Development Save Clone Rules Track Changes
Menu Administrator Org Unit Admin Report Admin	Choose who will handle the approvals: Manager Designate Travel Approver 1 Manager(s)
Security Keys Password Administrator Import Data	Travel Itinerary (Edit) No Rules Enabled Flight (Edit)
Manage Custom Fields Calendar Integration Admin Company Settings	No Rules Enabled Flight - View More Fares (Edit) No Rules Enabled
Share Custom Fields Login URL Manager Authentication Admin	Flight - Class of Service (Edit) • No Rules Enabled Ticket Change (Edit) • No Rules Enabled
User Administration User Administration Add User	Train (Edit) No Rules Enabled
Self-Registration Setup Self-Registration Approval Send Mobile Instructions	Car (Edit) • No Rules Enabled Hotel (Edit)
User Permissions Company Groups	No Rules Enabled Web Air (Edit) No Rules Enabled
Travel Administration Corporate Ghost Cards Virtual Payment Admin	Concur TripLink (Edit) • No Rules Enabled Messages - Flight Search Criteria (Edit)
E-Receipt Admin Travel Admin	 Flight is between airports and - Display in Popup Flights are international - Display in Popup Flight Arrival Country/Region is Colombia - Display in Popup

ravel Alternatives	

9

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.

SAP Concur C Requ	iests Travel Expense Invoice Approvals Reporting - App Center Links -	Administration - Help - Profile -
Company + Request Company Admin Home	Travel + Expense Invoice Travel Policy Administration Travel Policy Violation Reasons Travel Alternatives	
Company Admin Approval Queues Billing Administrator Company Locations Menu Administrator Org Unit Admin	Rule Classe (Edit Classes) Product Development Image: Save Save to Many Cancel Track Changes	
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Manage Custom Fields Calendar Integration Admin Company Settings Share Custom Fields	Require Pre-approval & Log Itinerary has car segments - and - Car vendor is not preferred Message when matched: G - General Itinerary has air segments - and - Require Pre-approval & Log Itinerary has air segments - and - 	
Authentication Admin User Administration User Administration	Flights are international - and - @ Booking Source is TripLink Message when matched: G - General \$	
Add User Self-Registration Setup Self-Registration Approval Send Mobile Instructions User Permissions Company Groups		
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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.



