USE CASE: ALIGNING T&E POLICY WITH SAP CONCUR CONFIGURATION FOR A PUBLIC SECTOR ORGANIZATION

How Lyndon Group improved employee experience, strengthened compliance, and unlocked six-figure annual savings

CHALLENGES

The global program was multifaceted and characterized by a lack of consistent controls, leading to various challenges in its T&E program. This imposed significant administrative burdens on employees involved, complicating management and execution. Additionally, the program faced escalating compliance risks, which further complicated its successful operation across different regions, ultimately impacting the overall employee experience.

POLICY RULES NOT SUPPORTED IN CONFIGURATION

- Receipt limit ($10) referenced in policy but not enforced in Concur.
- Pre-approval requirement unclear; audit rule not functioning properly.
- VAT rules existed in policy, but VAT not configured in Concur.
- Mileage/Province matching enforced in policy but unnecessary in configuration.

OUTDATED OR INCORRECT AUDIT RULES

- "Invalid Account Code" rule active despite accounting hierarchy already in place.
- Several rules applied to inactive "Z Not Used" expense types.
- Attendee rules not tied to correct expense types.
- Entertainment rules misaligned with actual expense categories.

WORKFLOW VS. POLICY MISMATCH

- Workflow required Default Approver 2, but policy did not specify second-level approval scenarios.
- Missing second-level approvers caused workflow failures.
- Policy hierarchy did not match system routing logic.

CLIENT OVERVIEW

A state public sector organization engaged Lyndon Group (LG) to evaluate misalignment between its written Travel & Expense (T&E) policy and the actual configuration within SAP Concur. Employees frequently received conflicting instructions, approvers lacked consistency in enforcement, and audit rules did not reflect policy intent — creating rework, user confusion, and compliance risk.

PRIMARY GOALS

- Improve employee experience
- Strengthen compliance & internal controls
- Reduce administrative effort
- Optimize SAP Concur configuration
- Identify quantifiable cost savings

WHAT LG DISCOVERED

LG completed a full policy-to-configuration evaluation, including:

- Mapping each policy requirement to a corresponding Concur setting.
- Identifying unsupported or contradictory policy elements.
- Rationalizing audit rules and removing outdated or invalid logic.
- Recommending workflow changes aligned to actual approval hierarchy.
- Streamlining attendee and entertainment-related rules.
- Addressing mileage, VAT, and pre-approval inconsistencies.

THE LG ENGAGEMENT

1.Fix Pre-Approval Enforcement

- Inactivate unreliable preapproval audit rule.
- Add Report Header dropdown:
  - “Was pre-approval completed in Concur Request or via form?”
- Trigger a warning if “form” is selected and the attachment is missing.

2. Enforce Policy-Driven Audit Rules

- Hotel rate > $350 → manager approval required.
- Tips thresholds: $2 (baggage/valet) and $5 nightly housekeeping.
- Personal travel flags → require approver verification.
- Government hospitality → require supporting documentation.

3. Retire Incorrect or Obsolete Audit Rules

- Remove rules tied to inactive expense types.
- Remove unnecessary VAT rules.
- Remove or revise “Invalid Account Code.”
- Consolidate duplicate Request audit rules.

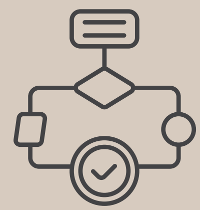
4. Correct Workflow Requirements

- Clarify when second-level approval is required.
- Ensure employees have valid Approver 2 values if workflows require them.
- Align workflow logic to the actual policy hierarchy.

RESULTS & IMPACT

Increased compliance through correct audit enforcement.

Reduced user frustration by aligning system with policy.



Cleaner workflows with fewer routing errors.

Accurate policy enforcement without manual intervention.

Lower maintenance burden through simplified audit rule structure.