Concur Expense: Car Configuration

Setup Guide

Last Revised: July 1, 2020

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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<th>Notes / Comments / Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1, 2020</td>
<td>Added information about the existing UI and NextGen UI; made modifications throughout; cover revision date updated</td>
</tr>
<tr>
<td>April 9, 2020</td>
<td>Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated</td>
</tr>
<tr>
<td>January 2, 2020</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>January 4, 2019</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>April 16, 2018</td>
<td>Added a note to the <em>Creating Car Expenses</em> section, stating that the payment type always defaults to Cash for mileage expenses.</td>
</tr>
<tr>
<td>April 4, 2018</td>
<td>Changed the check boxes on the front cover; no other changes; cover date not updated</td>
</tr>
<tr>
<td>January 4, 2018</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>December 14, 2016</td>
<td>Changed copyright; no other content changes.</td>
</tr>
<tr>
<td>October 27, 2016</td>
<td>Updated the Initial Distance field note and removed the Concurforce check box from the cover.</td>
</tr>
<tr>
<td>May 13, 2016</td>
<td>Updated instances of he/she to they.</td>
</tr>
<tr>
<td>May 15, 2015</td>
<td>Updated the screen shots to the enhanced UI; no other content changes</td>
</tr>
<tr>
<td>January 22, 2015</td>
<td>Added a note that deleting a configuration results in the automatic deletion of the associated personal cars in Profile</td>
</tr>
<tr>
<td>September 24, 2014</td>
<td>Added information about two user interfaces; no other content changes.</td>
</tr>
<tr>
<td>April 15, 2014</td>
<td>Changed copyright and cover; no other content changes.</td>
</tr>
<tr>
<td>February 7, 2014</td>
<td>A passenger rate can now be added to the Company Car type using variable rates just as it is supported for the Personal Car type</td>
</tr>
<tr>
<td>November 22, 2013</td>
<td>Added information about using a hierarchical list to assign different mileage rate reimbursement configurations to different users – this bypasses the traditional reconfiguration of users under the Group Configurations tool</td>
</tr>
<tr>
<td>January 13, 2013</td>
<td>Reimbursement rates are no longer locked, allowing the client to choose their own reimbursement rate (for example, lower amount of reimbursement rate or HMRC for reclaim value).</td>
</tr>
<tr>
<td>December 28, 2012</td>
<td>Made rebranding and/or copyright changes; no content changes.</td>
</tr>
<tr>
<td>October 19, 2012</td>
<td>Added information on:</td>
</tr>
<tr>
<td></td>
<td>• Update to Google Maps version 3 with this release</td>
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<tr>
<td></td>
<td>• Employee admin role can now view and (optionally) edit and register a new car on behalf of a user</td>
</tr>
<tr>
<td>August 17, 2012</td>
<td>Administrator can force the use of Google Map calculation instead of manually-mapped route calculation</td>
</tr>
<tr>
<td>February 2012</td>
<td>Changed copyright; no content change</td>
</tr>
<tr>
<td>Date</td>
<td>Notes / Comments / Changes</td>
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<td>----------------------</td>
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</tr>
<tr>
<td>December 17, 2011</td>
<td>Availability of Accumulate Mileage By option when configuring for the variable rate personal or company car</td>
</tr>
<tr>
<td>March 18, 2011</td>
<td>Updated Car Configuration to the current user interface</td>
</tr>
<tr>
<td>December 31, 2010</td>
<td>Updated the copyright and made rebranding changes; no content changes.</td>
</tr>
<tr>
<td>December 2010 (SU62)</td>
<td>Clarify that the country and currency selected for Single and Variable car configuration reimbursement rates must match the default country and currency of the employee for whom the car is being configured.</td>
</tr>
<tr>
<td>April 2010 (SU54)</td>
<td>Added information on Google Maps integration and Company Locations</td>
</tr>
<tr>
<td>February 2010 (SU52)</td>
<td>Added information on car registration form for current user interface</td>
</tr>
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Car Configuration

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 SAP Concur administrator.

Also, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP. In this case, the client must initiate a service request with support.
Section 2: Two User Interfaces for Concur Expense End Users

SAP is in the process of transitioning from the existing user interface (existing UI) to the new user interface (NextGen UI).

NextGen UI brings some long-awaited usability enhancements – some are significant (involving new pages and processes) while others are minor (involving only look-and-feel).

⚠️ IMPORTANT: Be aware that the NextGen UI enhancements affect only the end-user experience. Approvers and processors will still use the existing UI.

This Guide – What the User Sees

During this transition period – as clients are moving from the existing UI to NextGen UI – this guide will show both UIs. If there is an end-user screen sample that shows the existing UI, then there will be a NextGen UI sample as well.
Transition Guide for End Users

A detailed end-user guide is available. It describes all changes in NextGen UI.

Section 3: Overview

In some organizations, employees use a company car or personal car for business purposes and are reimbursed for maintenance or mileage as defined by the company policy.

Expense types such as maintenance and fuel are set up and configured like any other expense type; however, car mileage is an expense type that has some special configurations and helper panes associated with it. Submitting a mileage expense type is a way for the employee to pay for expenses such as maintenance and fuel for a car used for business purposes. This guide discusses the car mileage configurations that are supported in Concur Expense.

Concur Expense supports two types of car mileage configurations:

- **Company Car:** When tracking company car mileage, the employee tracks distance traveled and is reimbursed for miles traveled multiplied by the rate per mile. Company car mileage can also be tracked by storing a running total of distance traveled per car, and then restarting the running total yearly by entering zero rates and distances. In this case, the employee is reimbursed for actual expenses. There are two types of company car mileage reimbursements:
  - **Variable Rates:** A rate is defined for every mile traveled. This configuration supports a single rate and variable rates by rate bands, such as .20 USD per mile for every mile traveled, or .20 USD per mile when fewer than 4000 miles are traveled, and .25 USD per mile when 4001 miles or greater is traveled. The rate is based on specific criteria such as distance, petrol, diesel, engine size, and so on.
  - **Distance/No Reimbursement:** Car expenses are reimbursed at the actual amount. Expenses may include items such as fuel, maintenance, and insurance. There is no distance per mile reimbursement.

- **Personal Car:** A personal car configuration is created when employees use their own car for business purposes and are reimbursed for items such as maintenance, gas, and mileage as defined by the company, or are given a flat rate per mile traveled to cover car expenses. There are two types of personal car mileage reimbursements:
  - **One Rate:** Mileage is reimbursed at a flat rate, such as .20 USD per mile.
  - **Variable Rate:** Mileage is reimbursed based on specific criteria, such as .20 USD per mile when fewer than 4000 miles are traveled, and .25 USD per mile when 4001 miles or greater is traveled. Rates are based on distance and other criteria such as petrol, diesel, or engine size.

Both types of mileage configurations are set up and maintained on the Car Configuration page of Expense Admin.
Concur Expense supports multiple car registration forms to present to users in Profile, and to user administrators managing cars in User Administration on behalf of their users. These forms can be used when employees in different countries have different car mileage reporting requirements. The forms can include additional fields such as engine size, CO2 emission rate, and dates of circulation. The car registration forms are set up and maintained on the Forms and Fields page in Expense Admin.

**Criteria**

Companies reimburse their employees by using various criteria that are associated with rates, such as .20 USD per mile for engine sizes below 1000cc and .18 USD per mile for engine size of 1001cc-2000cc. Examples of criteria include:

- Engine size
- Diesel or petrol
- Emissions
- Vehicle type or vehicle value

The criteria used to establish reimbursement rates vary by country and company, and are dependent on applicable tax laws.

**Examples of Car Configurations**

A company may choose to create several car configurations to address various company policies:

- Track odometer readings for all company cars and fully reimburse employees for car expenses such as fuel and maintenance. To do this, the company creates a Distance/No Reimbursement car configuration type. This configuration ensures that the Company Car helper pane appears when the Company Car Mileage expense type is selected. The helper pane provides a field for employees to enter odometer start and odometer end readings. The Distance/No Reimbursement configuration type uses a distance rate reimbursement of zero.

- Track mileage under 4000 miles, between 4001 and 8000 miles, and over 8001 miles applying a different rate for each category. The company uses the Company Car Variable Rates configuration type to capture this information.

- Have an employee pay the company in order for the employee to use a company car. In this case, the company can apply a negative personal rate to a company car configuration. If the employee enters a mileage expense with only personal miles, then the amount would be a negative expense, meaning the employee owes the company money.

- Have all employees in France see a different car registration form so that they will enter data required by the French government. The company can create a form with the necessary fields:
  - CO2 emission
  - First date of circulation
  - First date of circulation with the current registration
Section 3: Overview

- Horsepower
- Energy
- Car type (custom field)
- Engine Size
- Registration Date
- Company first date of circulation
- End date of circulation

Then the company can create a car configuration for users in France and select this form.

Dependencies

Car mileage expense types are dependent on:

- **Expense Types defined within Expense Admin:** A car mileage expense type, either Personal or Company, must exist in the system for the mileage field(s) to appear on the page. Personal Car Mileage and Company Car Mileage expense types are provided as part of the system and are set to Active in the default policy. Once a car configuration is created for a group and country, then the employees who are assigned to the group and country can select company car and/or personal car expense types from the Expense helper pane. However, if the expense type has been deleted from the system, then the expense type will not appear in the expense types list regardless of whether a car configuration was created.

  📖 For more information about configuring expense types, refer to the *Concur Expense: Expense Types Setup Guide*.

- **Policies within Expense Admin:** If a car configuration is created for a group, the group must be assigned to a policy that has the mileage expense types active in order for the expense type to appear on the page.

  📖 For information about setting expense types to Active, refer to the *Concur Expense: Policies Setup Guide*.

Calculations and Amounts

The reimbursement amount calculated by Concur Expense is an estimated amount. Mileage expense entries in other reports not yet approved or submitted may affect the current report that contains a mileage expense. The reimbursement amount may change once the report is submitted.

**Company Car - Variable Rates**

Note the following:

- If there was no distance limit, then the **Amount** field is calculated as:
Section 3: Overview

Rate * Business Distance + Personal Rate * Personal Distance.
  - PLUS -
  Business Miles * No. of Passengers * Additional Passenger Rate

- If there is a distance limit or limits, then the Amount field is calculated as:

  Rate Under Limit * Business Distance under limit + Rate Over Limit *
  Business Distance over limit + Personal Rate * Personal Distance
  - PLUS -
  Business Miles * No. of Passengers * Additional Passenger Rate

**NOTE:** Calculating Distance under limit is only an estimate until the report is submitted, and then the Amount of Company Car entries may be updated.

**Personal Car**

Note the following:

- If there was no distance limit (one fixed rate), then the Amount field is calculated as:

  \[(Rate + (Rate Per Passenger * Number of Passengers)) * Distance\]

- If there is a distance limit or limits, then the Amount field is calculated as:

  \[(Rate Under Limit + (Rate Per Passenger * Number of Passengers)) * Distance under limit + (Rate Over Limit + (Rate Per Passenger * Number of Passengers)) * Distance over limit\]

**NOTE:** Calculating Distance under limit will only be an estimate until the report is submitted, and then the Amount of Personal Car entries may be updated.

**Calculating Mileage Using Google Maps**

Concur Expense has integrated with Google Maps to allow users to enter mileage expenses using the Google Maps interface. Note the following about this feature:

- The user can optionally select start and end points, and waypoints in between, for each mileage expense
  - OR -
  The administrator can enforce use of Google Maps route calculator for defining start, end and waypoints

- The locations entered by the user are stored and can be accessed again using a Most Recently Used list.

- Users can modify the distance on the Mileage expense entry.

- Company locations can be entered and listed for the user to choose from.

Refer to the *Company Locations* section of this guide for more information.
• The commute distance for the user can be subtracted from the mileage expense. Commute distance is calculated using the user’s home address value and the company location value.

• Audit rules can identify when the mileage has been edited to exceed the calculated amount, and whether the commute distance has been deducted.

  Refer to the Concur Expense: Audit Rules Setup Guide for more information.

• The Google Maps integration feature can be activated per car configuration.

  Refer to the Modifying Car Configurations section of this guide for more information.

• The Commute Deduction feature can be activated for car configurations that have Google Maps integration activated.

  Refer to the Modifying Car Configurations section of this guide for more information.

Setting Initial Distance

The **Initial Distance** field represents the odometer reading for the employee's car that is the accumulated distance within the reporting period, or the point when the employee begins using Concur Expense, depending on the car and rate type, variable or fixed. Capturing this information ensures that the correct rate is applied to the employee's car expense, when rates are based on miles or kilometers.

**NOTE:** If an incorrect Initial Distance figure is entered, the Employee administrator may have rights to correct the figure, but the Initial Distance figure can only be modified if there are no expenses created for the car yet. Once an expense is created for the car, the initial distance cannot be modified.

This data is intended to capture the mileage of the newly configured car at a point within a company’s reporting period cycle. This is different from the current overall mileage of the car. For example, if a new employee has already put 800 miles on their car in the current reporting cycle and been reimbursed for that mileage outside of Expense, Concur Expense needs the mileage (800 miles) so that additional mileage is correctly calculated. In this case, if the employee adds another 201 miles to the car, 200 miles can then be calculated at the Up to 1000 miles” rate while the single mile left over can now be correctly calculated at the correct rate for "Over 1,000 miles". If this scenario is not applicable, the employee should just set the initial distance as 0.

An **Initial Distance** field may appear for first-time registration of a personal or company car when the employee clicks the **New button** on the Company Car Registration page in Profile.
NOTE: The Initial Distance field is not intended for the car's current odometer reading. It is the accumulated distance within the reporting period that has been reimbursed using other means. This number is the distance to date for the reporting period.

Journal Entries

Journal Entries are created for Company Car Mileage entries. In cases where both business miles and personal miles have been accrued, two journal entries are created. Journal Entries are also created for Personal Car Mileage entries.

Default Configurations

Several car configurations may be included with your system by default. The configurations are provided as guidelines. You may use them as defined, or edit them to meet the specific needs of your organization.

Car Registration Form Configuration Process

Administrators can create custom forms for use when users register cars. The custom forms allow clients to gather additional data about the cars, and are most often used to meet European regulatory requirements. The forms are created then selected for each car configuration.

The configuration process is:

1. In List Management:
   - If you will be using the Energy list field, you must create the associated list.

      Refer to the Shared: List Management Setup Guide for more information.

2. In Forms and Fields:
   - Create the desired forms to use for car registration.
   - Add the desired fields to the forms.

      Refer to the Concur Expense: Forms and Fields Setup Guide for more information.

3. In Car Configuration:
   - Create or update the car configuration, selecting the desired car registration form.
Section 4: What the User Sees – Existing UI

Once a car configuration is set up within the Expense Admin, the employee is affected in two ways:

- Generally, the user must register their car in Profile before the user can create a car expense.

  Exception: The employee does not need to register a car in Profile if the configuration they use is the Personal Car One Rate configuration type. This is because the reimbursement rate is the same for all cars – it is not dependent on specific criteria such as engine size or vehicle type.

- When an employee creates a mileage expense, they are presented with the appropriate fields to ensure the correct information is gathered.

Registering Cars

The employee registers their car by using the Personal Car or Company Car link in Profile. Their user administrator uses the User Administration page to register a car on behalf of the employee they are administrating for.

- The Personal Car link only appears if the Personal Car Configuration is set up with a variable rate for the group and country to which the employee is assigned. The Personal Car link does not appear if the Personal Car One Rate configuration type has been created.

- The Company Car link appears if there is a Company Car Configuration set up for the group and country to which the employee belongs regardless of the type of company car configuration specified.
When selected, the user is presented with the car registration form. The fields displayed are configured for each car configuration:

![Company Car Registration Form]

To register a car in Profile, the employee completes or chooses:

- Car criteria such as engine size, car type, and emission value depending on the car configuration criteria and form that are selected.
- Distance traveled during the current period if mileage expenses were incurred and reimbursed before registering the car. Initial Distance is applicable only the first time Concur Expense is used, and the employee has incurred reimbursable mileage expenses for the current period.
- Any additional fields configured for the form.
**Preferred Car**

The user can select one personal and one company car as their Preferred Car, using the check box on the car registration form.

This car will be the default vehicle selected when the user creates a Mileage expense entry.
Creating Car Expenses

When the user creates a car expense, the appropriate fields are displayed (based on the configuration) to ensure that the user enters the correct information. For example, the From Location and To Location fields and Mileage.

**NOTE:** The reimbursement amount is only an estimate. Mileage expense entries in other reports not yet approved or submitted may affect the current report that contains a mileage expense. The reimbursement amount may change once the report is submitted.

![Mileage Calculator](image)

**NOTE:** The payment type always defaults to Cash for mileage expenses.

Calculating Mileage using Google Maps

Administrators can set Car configurations to use Google Maps for mileage calculation. When this feature is enabled, one of two actions occur when entering car mileage:

- The **Mileage Calculator** link option is available and can be used to populate the **From Location** and **To Location** fields.
• The **Mileage Calculator** window appears automatically, and the user is restricted from using the **From Location** and **To Location** fields, forcing mileage entries calculated using the calculator.

When they click the button, a window with a Google Maps interface appears, allowing them to enter the start and end points for their trip:
If the user has a Home Address configured, the first waypoint will default to that address:

When the user starts entering text, the configured Company Locations and Most recently used addresses appear:
Once the user has entered two waypoints, the mileage is calculated at the bottom of the screen:

The user can mark individual waypoints as Personal. Their mileage is deducted from the reimbursable amount:
If the car configuration is set to allow deduction, the user can click Deduct Commute to subtract their commute from the mileage:

When finished, the user clicks Add Mileage to Expense and the values are transferred to the expense entry:
Approvers

An approver cannot partially reject a personal car mileage expense, nor can they change the amount of the expense or any information that was provided by the employee by using the mileage helper. Depending on the configuration, the approver may be able to change the **Type of Trip** and **Receipt Status** fields, if available and if appropriate.

User Administrator: Managing Cars on Behalf of an Employee

The user administrator can view, and optionally edit and/or register a car on behalf of the employee they are administrating. This is done using the **Personal Car** and/or **Company Car** links made available to the user administrator through the **User Administration** page. The user administrator selects a user to manage and uses these links to open the identical car configuration page the user sees through their Profile access to car configuration.

![Car Configuration Page](image)

When they click the link, the **Car Registration** page appears.

![Car Registration Page](image)

The user administrator has permissions to view the car configuration, but may be restricted from editing an existing car, or registering a new car for the user. For example, the figure above shows the **New** button which is available to the administrator based on selection of the **Allow user administrator to add car** setting available during the initial car configuration setup.
Enabling and Restricting Car Configuration for the User Administrator

A user administrator can be restricted from using selected areas of car registration options. Permissions are granted as follows:

- **Permissions to Register a Car:** If the *Allow user administrator to add car* setting is selected in Car Configuration, the administrator will see the *New* button in the **Car Registration** page and may use this to add another car on behalf of the user.

  ![Car Configuration Options](image)

  **NOTE:** This setting can be different for each car configuration, allowing selective administrator access to cars based on the car configuration.

- **Permissions to Change Expense Car Form Fields:** If a field is set to *Modify* for the user administrator they have permissions to change values in that field, while *Read-Only* and *Hidden* restrict the ability to perform changes.
**IMPORTANT:** By default, only the **Initial Distance** field is set to *Modify* for the user administrator - the Expense Configuration admin must change any other Car form field, such as Vehicle ID, to grant access to the user administrator.
**What the User Administrator Sees**

The user administrator selects a user to manage and is given permissions to use the Personal or Company Car links to view the car configuration for that user. Beyond this, the overall configuration dictates what they can and cannot do.

The example above hides the **New** button, and sets all fields excepting **Initial Distance** to Read-Only. The administrator is denied the ability to edit any other fields or register a car for the user they are managing.

In the figures below, full permissions are granted. The **New** and **Remove** buttons are enabled through car configuration:
When opening a car for editing, all fields are available to the user administrator:

**BEST PRACTICE: EDITING THE INITIAL DISTANCE FIELD**

As best practice, the **Initial Distance** field should be made set to Modify for the user administrator (this is the default setting for this field). This allows the user administrator to reset the distance figure should corrections be required without need to contact SAP. When correcting this field, the system will prompt for the change - click OK to dismiss the confirmation message.
NOTE: Resetting the initial distance does not recalculate the mileage within existing reports, but does provide the correct base mileage for reports created after the correction.

Section 5: What the User Sees – NextGen UI

Once a car configuration is set up within the Expense Admin, the employee is affected in two ways:

- Generally, the user must register their car in Profile before the user can create a car expense.

  Exception: The employee does not need to register a car in Profile if the configuration they use is the Personal Car One Rate configuration type. This is because the reimbursement rate is the same for all cars – it is not dependent on specific criteria such as engine size or vehicle type.

- When an employee creates a mileage expense, they are presented with the appropriate fields to ensure the correct information is gathered.

Registering Cars

The employee registers their car by using the Personal Car or Company Car link in Profile. Their user administrator uses the User Administration page to register a car on behalf of the employee they are administrating for.

- The Personal Car link only appears if the Personal Car Configuration is set up with a variable rate for the group and country to which the employee is assigned. The Personal Car link does not appear if the Personal Car One Rate configuration type has been created.

- The Company Car link appears if there is a Company Car Configuration set up for the group and country to which the employee belongs regardless of the type of company car configuration specified.
When selected, the user is presented with the car registration form. The fields displayed are configured for each car configuration:

![Company Car Registration Form]

To register a car in Profile, the employee completes or chooses:

- Car criteria such as engine size, car type, and emission value depending on the car configuration criteria and form that are selected.
- Distance traveled during the current period if mileage expenses were incurred and reimbursed before registering the car. Initial Distance is applicable only the first time Concur Expense is used and the employee has incurred reimbursable mileage expenses for the current period.
- Any additional fields configured for the form.
**Preferred Car**

The user can select one personal and one company car as their Preferred Car, using the check box on the car registration form.

This car will be the default vehicle selected when the user creates a Mileage expense entry.
Creating Car Expenses

When the user creates a car expense, the appropriate fields are displayed (based on the configuration) to ensure that the user enters the correct information. For example, the From Location and To Location fields and Mileage.

**NOTE:** The reimbursement amount is only an estimate. Mileage expense entries in other reports not yet approved or submitted may affect the current report that contains a mileage expense. The reimbursement amount may change once the report is submitted.

**NOTE:** The payment type always defaults to Cash for mileage expenses.

Calculating Mileage using Google Maps

Administrators can set Car configurations to use Google Maps for mileage calculation. When this feature is enabled, one of two actions occur when entering car mileage:

- The **Mileage Calculator** link option is available and can be used to populate the **From Location** and **To Location** fields
The **Mileage Calculator** window appears automatically, and the user is restricted from using the **From Location** and **To Location** fields, forcing mileage entries calculated using the calculator.

When they click the button, a window with a Google Maps interface appears, allowing them to enter the start and end points for their trip:
Section 5: What the User Sees – NextGen UI

If the user has a Home Address configured, the first waypoint will default to that address:

When the user starts entering text, the configured Company Locations and Most recently used addresses appear:

Once the user has entered two waypoints, the mileage is calculated at the bottom of the screen:
The user can mark individual waypoints as Personal. Their mileage is deducted from the reimbursable amount:

If the car configuration is set to allow deduction, the user can click **Deduct Commute** to subtract their commute from the mileage:
When finished, the user clicks **Add Mileage to Expense** and the values are transferred to the expense entry:

![New Expense Form](image)

**Approvers**

An approver cannot partially reject a personal car mileage expense, nor can they change the amount of the expense or any information that was provided by the employee by using the mileage helper. Depending on the configuration, the approver may be able to change the **Type of Trip** and **Receipt Status** fields, if available and if appropriate.

**User Administrator: Managing Cars on Behalf of an Employee**

The user administrator can view, and optionally edit and/or register a car on behalf of the employee they are administrating. This is done using the **Personal Car** and/or **Company Car** links made available to the user administrator through the **User Administration** page. The user administrator selects a user to manage and uses these links to open the identical car configuration page the user sees through their Profile access to car configuration.
When they click the link, the Car Registration page appears.

The user administrator has permissions to view the car configuration, but may be restricted from editing an existing car, or registering a new car for the user. For example, the figure above shows the New button which is available to the administrator based on selection of the Allow user administrator to add car setting available during the initial car configuration setup.

**Enabling and Restricting Car Configuration for the User Administrator**

A user administrator can be restricted from using selected areas of car registration options. Permissions are granted as follows:

- **Permissions to Register a Car:** If the Allow user administrator to add car setting is selected in Car Configuration, the administrator will see the New button in the Car Registration page and may use this to add another car on behalf of the user.
NOTE: This setting can be different for each car configuration, allowing selective administrator access to cars based on the car configuration.

- **Permissions to Change Expense Car Form Fields:** If a field is set to *Modify* for the user administrator they have permissions to change values in that field, while *Read-Only* and *Hidden* restrict the ability to perform changes
**IMPORTANT:** By default, only the **Initial Distance** field is set to *Modify* for the user administrator - the Expense Configuration admin must change any other Car form field, such as Vehicle ID, to grant access to the user administrator.
What the User Administrator Sees

The user administrator selects a user to manage and is given permissions to use the Personal or Company Car links to view the car configuration for that user. Beyond this, the overall configuration dictates what they can and cannot do.

The example above hides the New button, and sets all fields excepting Initial Distance to Read-Only. The administrator is denied the ability to edit any other fields or register a car for the user they are managing.

In the figures below, full permissions are granted. The New and Remove buttons are enabled through car configuration:
When opening a car for editing, all fields are available to the user administrator:

![Car Registration](image)

**BEST PRACTICE: EDITING THE INITIAL DISTANCE FIELD**

As best practice, the **Initial Distance** field should be made set to Modify for the user administrator (this is the default setting for this field). This allows the user administrator to reset the distance figure should corrections be required without need to contact SAP. When correcting this field, the system will prompt for the change - click OK to dismiss the confirmation message.
Section 6: Car Configuration Procedures

The Car Configuration page allows an administrator to specify the company or personal car reimbursement rate, to indicate whether there is a distance limit at which the rate changes, and to provide other criteria that set the rate.

Concur Expense provides these options for company car reimbursement:

- **Distance/No Reimbursement**: The employee is reimbursed for actual company car expenses, and not for mileage. No rates need to be entered.
- **Variable Rates**: The employee is reimbursed for company car mileage based on certain criteria, such as engine size, emissions value, petrol, or diesel.

Concur Expense provides these options for personal car reimbursement:

- **One Rate for All Cars**: The employee is reimbursed at a single rate for all car–related expenses regardless of distance or criteria.
- **Variable Rates Depending on Car Type**: The employee is reimbursed at a rate based on a car type as defined by various criteria such as engine size, emissions value, petrol or diesel. The administrator defines the criteria using the personal car configuration wizard.

Accessing Car Configurations

Car configurations should be created after the appropriate car registration forms have been created.

- **To access Car Configurations**:
  1. Click Administration > Expense.
2. Click **Car Configuration** (left menu). The **Car Configuration** page appears.

![Car Configuration page screenshot](image)

The **Car Configuration** page displays all car configurations created on a Global and Group level. Configurations only appear on the page for the groups that you have access to administer. Employees assigned the role of Expense Configuration administrator for the Global group can view, edit and delete all car configurations.

- The **Editable By** column identifies the administrators who can modify the car configuration.
- The **Applies to** column identifies the groups to which the configuration data applies.

**NOTE:** If you need greater granularity in your group hierarchy when assigning mileage reimbursement within a company, you can use the group hierarchy tree functionality. To do this, clear (disable) the **Use Named Groups for Car Configuration** check box on the **Site Settings** page. For more information, refer to the section **Assigning Different Car Reimbursements Rates Using UnNamed Groups** in this manual.

- The **Country** column indicates the country to which this configuration applies.

A car configuration is associated with a group *and* a country, as are employees. The car configuration options in Concur Expense only appear to the employee if the criterion set for the car configuration matches the country and group to which the employee belongs.
One Rate or No Reimbursement Configuration

To create a One Rate or No Reimbursement configuration:


2. Complete the required fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration Name</td>
<td>Type a descriptive name for the car configuration. This name appears on the Car Configuration page.</td>
</tr>
<tr>
<td>Car Type</td>
<td>Select the desired car type:</td>
</tr>
<tr>
<td></td>
<td>• Personal Car - One Rate: The car is employee owned and maintained. The employee is reimbursed for expenses.</td>
</tr>
<tr>
<td></td>
<td>• Company Car - Distance/No Reimbursement: The employee is reimbursed for actual expenses; company car distance entries would be created only to track odometer readings, and so on. The employee would also be expected to create expenses for gas, maintenance, insurance, and so on.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editable By</td>
<td>Select the group rights that an administrator must have in order to modify the configuration.</td>
</tr>
<tr>
<td>Applies to</td>
<td>Select the group(s) to which the car configuration applies. <strong>NOTE</strong>: If you need greater granularity in your group hierarchy when assigning mileage reimbursement within a company, you can use the group hierarchy tree functionality. To do this, clear (disable) the <strong>Use Named Groups for Car Configuration</strong> check box on the <strong>Site Settings</strong> page. For more information, refer to the section <strong>Assigning Different Car Reimbursements Rates Using UnNamed Groups</strong> in this manual.</td>
</tr>
<tr>
<td>Country</td>
<td>Select a country for this configuration. The country value indicates which employees use this configuration for car distance entries. You can easily access the country name by typing the first letter of the country, such as <strong>U</strong> for United States, to go immediately to all countries that begin with <strong>U</strong>. Continue typing until you reach the country you want. <strong>NOTE</strong>: In the case where an employee from the United States travels to Canada, the United States rates would apply. An employee is also linked to a locale defined in User Administration; however, locale does not always identify the country in which the employee is located, although in most cases it is the same. The locale determines how date and time are formatted. For example, an employee could be a US citizen working in Germany, so his locale is US-ENG, but the country in which the rates for reimbursement apply, is Germany. The employee can view dates in the US format (mm/dd/yyyy) not the German format (yyyy/mm/dd), but the German configuration rates for car mileage will apply. <strong>IMPORTANT</strong>: The country selected here for the car configuration <strong>must</strong> match the default country of the employee. This may <strong>not</strong> be the same as the default locale of the employee.</td>
</tr>
<tr>
<td>Currency</td>
<td>Select the currency in which the rate is entered (for example, Euros or US Dollars). The rate is displayed to the employee using the standard alpha currency code, such as EUR or USD. The calculation performed and displayed to the employee uses the currency specified. <strong>IMPORTANT</strong>: The currency selected here for the car configuration <strong>must</strong> match the default currency of the employee.</td>
</tr>
<tr>
<td>Form</td>
<td>Select the car registration form you would like users to see in Profile.</td>
</tr>
</tbody>
</table>

### Car Configuration Procedures

**Field** | **Description**
--- | ---
Allow Google Maps Integration | Select an option:
- **No:** The Google Maps **Mileage Calculator** link is hidden, and the user enters the To and From location manually
- **Yes:** The Google Maps **Mileage Calculator** link is available and can be used optionally, in place of the To and From Location options
- **Required:** The **Mileage Calculator** window appears automatically when the user chooses the car mileage expense types - the To and From Location options are disabled and automatically populated from the mileage calculator waypoints

Allow deduction | Select the check box to allow users to deduct commute distances from their mileage expenses.
**NOTE:** Only available when using Google Maps Integration.

Allow user administrator to add car | Select the check box to allow the user administrator to add a car on behalf of the employee they are administering in User Admin.
**NOTE:** This privilege is additional to their ability to view and edit existing car configurations on behalf of an employee.

3. Click **Next**. The **Rates** step appears.
NOTE: If you chose **Company Car - Distance/No Reimbursement** as the Car Type in Step 2, the configuration is complete and you are returned to the **Company Car Configuration** page. No additional steps are required.

4. Click **New**. A new line appears.

5. Complete the fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>Select a date from the Date helper pane that you want this rate to take effect. The rate will be applied to any personal car mileage expense with a date greater than or equal to the date you select.</td>
</tr>
</tbody>
</table>
6. Click **Save**.

7. Click **Done**.

**Variable Rate Configuration (Company or Personal car)**

*To create a Variable Rates Configuration:*

1. On the **Car Configuration** page, click **New**. The **General** step of the **Car Configuration** wizard appears.

![Car Configuration Wizard](image)

2. Complete the required fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate</td>
<td>Type a number using the appropriate decimal places for a rate per mile or kilometer.</td>
</tr>
</tbody>
</table>
## Car Configuration Procedures

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Car Type</strong></td>
<td>Select one of the car types to indicate the car owner and how the reimbursement is being handled:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Personal Car – Variable Rates</strong>: The employee is reimbursed at a fixed rate for all personal car distance entries, such as .20 USD a mile.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Company Car - Variable Rates</strong>: The employee is reimbursed at a fixed rate for all company car distance entries, such as .20 USD a mile.</td>
</tr>
<tr>
<td><strong>Accumulate Distance By</strong></td>
<td>Choose the distance accumulation calculation method for the Variable Rate (only) personal or company car configuration. There are three options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Configuration</strong>: Calculate accumulated mileage for one or more cars according to the overall car configuration</td>
</tr>
<tr>
<td></td>
<td>- <strong>Car Criteria</strong>: Calculate accumulated mileage for one or more cars according to the specific car criteria under which the car is registered</td>
</tr>
<tr>
<td></td>
<td>- <strong>Car</strong>: Calculate accumulated mileage for this car only and no others</td>
</tr>
<tr>
<td><strong>Editable By</strong></td>
<td>Select the group rights that an administrator must have in order to modify the configuration.</td>
</tr>
<tr>
<td><strong>Applies to</strong></td>
<td>Select the group(s) to which the car configuration applies.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong>: If you need greater granularity in your group hierarchy when assigning mileage reimbursement within a company, you can use the group hierarchy tree functionality. To do this, clear (disable) the Use Named Groups for Car Configuration check box on the Site Settings page. For more information, refer to the section Assigning Different Car Reimbursements Rates Using UnNamed Groups in this manual.</td>
</tr>
<tr>
<td><strong>Country</strong></td>
<td>Select a country for this configuration. The country value indicates which employees use this configuration for car distance entries. You can easily access the country name by typing the first letter of the country, such as U for United States, to go immediately to all countries that begin with U. Continue typing until you reach the country you want. <strong>NOTE</strong>: In the case where an employee from the United States travels to Canada, the United States rates would apply. An employee is also linked to a locale defined in User Administration; however, locale does not always identify the country in which the employee is located, although in most cases it is the same. The locale determines how date and time are formatted. For example, an employee could be a US citizen working in Germany so his locale is US-ENG, but the country in which the rates for reimbursement apply, is Germany. The employee can view dates in the US format (mm/dd/yyyy) not the German format (yyyy/mm/dd), but the German configuration rates for car mileage will apply. <strong>IMPORTANT</strong>: The country selected here for the car configuration must match the default country of the employee. This may not be the same as the default locale of the employee.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency</td>
<td>Select the currency in which the rate is entered (for example, Euros or US Dollars). The rate is displayed to the employee using the standard alpha currency code, such as EUR or USD. The calculation performed and displayed to the employee uses the currency specified. <strong>IMPORTANT:</strong> The country selected here for the car configuration must match the default country of the employee. This may not be the same as the default locale of the employee.</td>
</tr>
<tr>
<td>Form</td>
<td>Select the car registration form you would like users to see in Profile.</td>
</tr>
<tr>
<td>Allow Google Maps Integration</td>
<td>Select the check box to allow users to use the Google Maps Mileage Calculator when creating mileage expenses.</td>
</tr>
<tr>
<td>Allow deduction</td>
<td>Select the check box to allow users to deduct commute distances from their mileage expenses. Only available when using Google Maps Integration.</td>
</tr>
<tr>
<td>Allow user administrator to add car</td>
<td>Select the check box to allow the user administrator to add a car on behalf of the employee they are administrating in User Admin. <strong>NOTE:</strong> This privilege is additional to their ability to view and edit existing car configurations on behalf of an employee.</td>
</tr>
</tbody>
</table>

3. Click **Next**. The **Distance Limits** step appears.

4. Complete the required fields.
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distance Limit1</td>
<td>Enter the limit where the rate changes, such as 1000 miles, if applicable. Limits are not required. You can set up criteria without designating limits.</td>
</tr>
<tr>
<td>Distance Limit2</td>
<td>Enter the next limit where the rate changes, such as 2000 miles, if applicable.</td>
</tr>
<tr>
<td>Distance Limit3</td>
<td>Enter the next limit where the rate changes, such as 15000 miles, if applicable.</td>
</tr>
<tr>
<td>Period for Distance Limits</td>
<td>Defines the timeframe for which distance limits are reset to zero and the lowest distance limit rate is applied. For example, if the period is monthly, then the tracking of miles for an employee is reset to zero at the beginning of the month. This means that when the employee submits an expense report at the beginning of the month, the first rate would apply again, even if the distance at the end of the previous month exceeded the beginning distance rate. Select monthly, quarterly, or annually. This field is required if a distance limit is entered. If <strong>Annually</strong> is selected, then <strong>Starting Month</strong> and <strong>Starting Day</strong> fields appear in the helper pane. These are required fields.</td>
</tr>
<tr>
<td>Starting Month</td>
<td>Select the month the year begins. This field only appears if <strong>Period for Distance Limits</strong> is set to <strong>Annually</strong>.</td>
</tr>
<tr>
<td>Starting Day</td>
<td>Select the day of the month the year begins. This field only appears if <strong>Period for Distance Limits</strong> is set to <strong>Annually</strong>.</td>
</tr>
</tbody>
</table>
5. Click **Next**. The **Criteria** page appears.

6. Click **New**. The **New Car Criteria** window appears.

7. Type a criterion, and then click **OK**. Repeat steps 6-7 until the Criteria list is completed.
8. Click **Next**. The **Rates** step appears.

9. Click **New**. A new line appears.

10. Complete the required fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle Type</td>
<td>Select the type of vehicle the rate applies to.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Select the date the rate should take effect.</td>
</tr>
<tr>
<td>Rate 1 to X</td>
<td>Type the rate that applies to this distance. The X value in the field name reflects the number you entered for <strong>Distance Limit 1</strong> in the Distance Limits step.</td>
</tr>
<tr>
<td>Rate from X to Y</td>
<td>Type the rate that applies to this distance. The X value in the field name is the number you entered in the first <strong>Distance</strong> field plus 1. The Y field name reflects the number you entered for <strong>Distance Limit 2</strong> in the Distance Limits step. Note that, when adding the rate, the number of digits to the right of the decimal is <strong>always</strong> four, regardless of the chosen currency.</td>
</tr>
<tr>
<td>Rate from Y to Z</td>
<td>Type the rate that applies to this distance. The Y value in the field name is the number you entered in the first <strong>Distance field</strong> plus 1. The Z value in the field name reflects the number you entered for <strong>Distance Limit 3</strong> in the Distance Limits step. Note that, when adding the rate, the number of digits to the right of the decimal is <strong>always</strong> four, regardless of the chosen currency.</td>
</tr>
</tbody>
</table>
### Assigning Different Car Reimbursements Rates Using UnNamed Groups

Depending on a company's policy, an administrator can elect to use an "UnNamed" group hierarchy tree in order to select and assign different car mileage reimbursement rates to their car users. This provides greater granularity for the assignment of mileage rate reimbursements to different users within a company. Terminology for this feature is used as follows:

- **Named Group:** A Group that originates from the Group Configurations tool, and under which is mapped the car configuration attributes (car mileage reimbursement rate in this discussion) to groups of users in a company.

- **UnNamed Group:** A group-like list of hierarchical nodes created using the List Management tool, and configured to mimic a Group structure (Global > UK > Directors; Global > UK > Marketing as examples in this section) by allowing association of a node (group) of users to the specified car mileage reimbursement rates.

### Example - Assigning to Different Users

Assume you have different user types, Directors, Marketing, and Sales, that you want to reimburse at different care mileage rates. If the company's car configuration business policy is the only difference between these employee types, creating or modifying Groups for this business purpose adds an additional configuration maintenance burden for a relatively simple need. Instead, you can create named “groups” using a hierarchical list and expose this list within the Car Configuration tool for association to these groups of users.

### How It Works

The administrator works with several tools within Concur Expense to create and expose the hierarchical list that mimics the employee group structure they want to

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate Over Z</td>
<td>Type the rate that applies to this distance. The Z value reflects the number you entered for Distance Limit 3 in the Distance Limits step.</td>
</tr>
<tr>
<td>Personal Rate (Company car only)</td>
<td>Type a rate that is used when an employee uses the company car for personal use, such as .10. This rate is multiplied by the distance entered by the employee in the Personal Distance field in the Car Mileage helper pane and then added to the distance entered in the Business Distance field multiplied by the rate. Example: (Personal Rate<em>personal distance) + (Business Miles</em>rate)</td>
</tr>
<tr>
<td>Rate per passenger</td>
<td>If applicable, type a rate for a passenger, such .03. Note that, when adding the rate, the number of digits to the right of the decimal is always four, regardless of the chosen currency.</td>
</tr>
</tbody>
</table>

11. Click **Done**. The **Car Configuration** page appears.
work with (Global > UK > Directors; Global > UK > Marketing as examples). A setting in Site Settings is used to tell Concur Expense to replace the traditional Group-based hierarchy in Car Configuration with the list-based hierarchy the administrator has created.

The general steps required to configure this feature are as follows:

**NOTE:** Access to one or more tools may be restricted – consult with your Concur Expense administrator or submit a Service Request to Support to configure those tools you do not have access to.

- **Step 1 - List Management:** Create the hierarchical list using the Employee Groups list type in the List Management tool.

  Refer to *Shared: List Management Setup Guide* for more information.

- **Step 2 - Forms and Fields:** Edit the Employee header form to select the list, add and configure fields, and preview and assign your work to the Default Employee Information form. Then, do the same for the Employee Entry form, being sure to apply the Hidden attribute to the fields at this level and assign the connected list to the Car Mileage form.

  Refer to *Concur Expense: Forms and Fields Setup Guide* for more information.
• **Step 3 - User Administration:** Review the fields and access rights you have added in Step 2 by opening User Administration and noting the field appearance and behavior.

  Refer to *Shared: User Administration User Guide* for more information.

• **Step 4 – Feature Hierarchies:** Add the field structure in the desired order (Level One; Level Two) to the Employee hierarchy feature, and confirm your changes.

  Refer to *Shared: Feature Hierarchies Setup Guide* for more information.

• **Step 5 – Group Configurations:** Match the hierarchical list naming structure you created using the List Management tool by entering these names as nodes under the Global group in Group Configurations, repeating this for the Employee group configuration as well.

  Refer to *Expense: Group Configurations Setup Guide* and *Shared: Group Configurations for Employees Setup Guide* for more information.

• **Step 6 – Site Settings:** Clear (disable) the **Use Named Groups for Car Configuration** setting – this replaces the traditional Group-based list with the list you created using the List Management tool, allowing you to now select and assign mileage rates to the “group” displayed in list format.

  For more information about site settings, refer to *Concur Expense: Site Settings Setup Guide*.

### Modifying Car Configurations

Both the employee and their user administrator can view and edit the car configuration. However, only the user administrator may edit the Initial Distance field.

Please note the following when modifying car configurations:

- Changes to the configuration take effect immediately for all expense reports not filed.
- Expense reports that have already been processed will not be affected by the change.
- For Company Car Variable Rates and Personal Car Variable Rates, an administrator can edit the **Configuration Name**, **Applies to**, **Editable by**, and **Allow Google Maps integration** fields. All other fields are read-only.
- If rates have been assigned to a Personal Car One Rate configuration, then the Effective Date for the configuration cannot be changed.

**NOTE:** A Company Car Distance/No Reimbursement configuration cannot be edited once an expense report that uses that configuration has been submitted.
Section 6: Car Configuration Procedures

To modify a car configuration:

1. On the Car Configuration page, select the name of the desired car configuration.
3. Make any necessary changes.

**NOTE:** For complete field definitions, refer to the information in this guide about adding configurations.
4. Click Done.

Deleting Car Configurations

Note the following:

- If a car rate is used in a submitted expense report, then the car configuration is removed from view but still exists in Concur Expense.
- If a car rate has not been used, then the car configuration is permanently deleted from the system.
- If a personal car is available in a user’s profile and if you delete the associated car configuration, the system automatically deletes the personal car information in the profile.

⚠️ **IMPORTANT:** Consider alerting your users that the personal car information will be deleted and that they must re-enter the information when the new configuration is available.

To delete a car configuration:

1. On the Personal and Company Car Configuration page, select the desired configuration.

**NOTE:** Click Select All to delete all configurations.

2. Click Delete Selected Rows.
Section 7: Company Locations

Overview

Use the Company Locations section of Company Admin to set up company locations for your organization. There are three uses for company locations:

- You can assign users to company locations in order to automatically add a work address to their user record. Users have the ability to update their own home or work addresses in their profile.
- Users can select company locations when adding a mileage expense (requires Google Maps integration).
- Companies using commute deduction can subtract the distance between the user’s home address and work address for mileage expenses (requires Google Maps integration).

Geocoding

Geocoding is the process of assigning latitude and longitude to a point, based on street addresses, city, state, and zip code. The Geocoding option adds the latitude and longitude to a company location. This enables users to search for hotels by company location.

Best Practice Tips:

- It is not required to add zip code when adding company locations, however results will be more accurate if zip code is included.
- For best results, do not include suite or floor numbers with the street address. You can enter this information after you geocode but before you save to include it as part of the address.
- When entering company locations, enter the addresses consistently. The company location list is in alpha order by country code. Then, they are listed by city, state, and location name. If you enter the state for one location but not for another, they will appear under separate headings in the locations list.
- For addresses containing the number (#) sign, change this to the word Number or abbreviation No. Google Maps does not recognize the # sign.

Creating a New Company Location

To create a new company location:

1. Click Administration > Company > Company Admin.
2. Click **Company Locations** (left menu). The **Locations for Company** page appears.

![Locations for Company](image1)

3. Click the **Add New Company Location** link. The **Location Detail for Company** page appears.

![Location Detail for Company](image2)
4. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter a name for the location that will be relevant to the user. This name will appear when selecting locations to find a hotel.</td>
</tr>
<tr>
<td>Address, City, State, Province, Region</td>
<td>Enter the address for the location.</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>Enter the ZIP or postal code for more accurate geocoding.</td>
</tr>
<tr>
<td>Country</td>
<td>Select the appropriate country for the location.</td>
</tr>
<tr>
<td>Latitude/Longitude</td>
<td>Enter the latitude and longitude (with no decimal places) of the location.</td>
</tr>
<tr>
<td>Geocode</td>
<td>Click this button to encode the latitude and longitude for the location. If there is more than one possible result, Travel might show choices in a popup box. Select the choice that most closely matches the location you are trying to enter.</td>
</tr>
<tr>
<td>Allow Delivery/Collection of rental cars at this location</td>
<td>All GDSs except Worldspan</td>
</tr>
<tr>
<td></td>
<td>Select as appropriate.</td>
</tr>
<tr>
<td></td>
<td>This check box will not appear unless car delivery and collection has been enabled for at least one travel configuration (Travel System Admin, on the Car Connectors section of the travel configuration) and:</td>
</tr>
<tr>
<td></td>
<td>• For Sixt, a valid discount number is present.</td>
</tr>
<tr>
<td></td>
<td>• For vendors that are not direct connect, the vendor code must be entered in the Allow delivery and collection for the following car rental chains field.</td>
</tr>
</tbody>
</table>

5. Click Save.

**Editing a Company Location**

- **To edit a location:**
  1. Click Company Locations.
  2. Click the Edit link next to a location.
  3. Edit the address for the location. (All fields are described in the section above about adding a location.)
  4. Click Save.
Deleting a Company Location

To delete a location:

1. Click Company Locations.
2. Click the Edit link next to a location.
3. Click Delete.