

Shared: Locations

Setup Guide

Last Revised: January 28, 2021

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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Revision History

Date	Notes/Comments/Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
January 28, 2021	Removed references to updating LOCODEs to match the United Nations LOCODE list. Updated instances of Concur to SAP Concur. Other assorted updates.
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
December 5, 2019	Updated the note regarding the Amtrak station list and Concur Request in the <i>Overview > Locations Type</i> section.
March 20, 2019	Changed the term "payment request" to "invoice" where applicable; no other content changes.
February 11, 2019	Updated the copyright; no other changes; cover date not updated
September 27, 2018	Added note about missing Amtrak stations to the <i>Location Types</i> section.
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated.
February 8, 2018	Updated guide name in references to the <i>Shared: Locations Import, Version 2 Specification</i> guide.
January 29, 2018	Updated the copyright; no other changes; cover date not updated
October 14 2017	Added the following note: The administrator may view, but not edit, the Concur-maintained locations. Information about changes that are needed may be submitted for consideration to Concur Client Support.
August 10 2017	Updated the <i>Some Locations Automatically Available</i> section.
March 30 2017	Updated the <i>Some Locations Automatically Available</i> section.
January 24 2017	Clarified the impact of marking automatically available lists as Not-Maintained (by Concur.)
December 19 2016	Added support for China Railway.
December 14 2016	Changed copyright and cover; no other content changes.
March 24 2016	Added a note about the tool not currently being available for Invoice clients.
January 25 2016	Changed references to the import/extract guide; no other changes
August 14 2015	Added note that Request does not support Japan Public Transportation Stations location type.
April 24 2015	Removed information about the old UI; no other content changes
October 3 2014	Added information about the two user interfaces; no other content changes

Date	Notes/Comments/Changes
February 7 2014	Added information about: <ul style="list-style-type: none"> • Cities separate from airports • IATA field is read-only
November 8 2013	Stress that custom codes must incorporate a number to avoid conflict with UN LOCODE standards,
July 19 2013	Addition of the Settings tab and options to this document
February 27 2013	Name change from "Travel Request" to "Request" – <i>no other content changes</i>
December 28 2012	Made rebranding and/or copyright changes; no content changes
February 17 2012	Added additional search criteria when search for locations and the ability to search by a specific timeframe.
February 2012	Changed copyright; no content change
June 20 2011	Added information about rail location codes; some associated locations are populated automatically while some must be either entered manually or imported
May 20 2011	Added information about the Location Type and IATA
December 31 2010	Updated the copyright and made rebranding changes; no content changes
December 17 2010	Addition of second line in the Search function to allow further refinement of search criteria
October 15 2010	This feature is also used by the Travel Request feature
Sept 17 2010	Feature now available in new interface - updated guide
January 15 2010	Added information about "Administrative Regions" (counties)
December 2009	Changed to stand-alone setup guide; no content change

Locations

Section 1: Permissions

A company administrator might not have the correct permissions to use this feature. The administrator might have limited permissions, for example, they might only be able to modify certain groups and/or use only certain options. (For example, they might be able to view items but not create or edit them).

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

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by an SAP Concur employee. In this case, the client must initiate a service request with SAP Concur support.

Section 2: Overview

The Locations tool is used by the administrator to add additional locations (cities, airports, and rail stations) to the Location list used in Concur Expense, Concur Invoice, and Concur Request. This list enables an employee to quickly select a city to automatically populate an expense report, invoice, or request.

Using the Locations tool, the administrator can:

- Perform a targeted search for locations by country, status, and other criteria
- Add or edit locations

NOTE: The administrator can also use the Locations Import. Refer to the *Shared: Locations Import, Version 2 Specification*.

- Add different names for the same city (such as "Florence" and "Firenze")
 - Activate (make visible to users) or deactivate (remove visibility to users) a location
-

NOTE: Although the Locations tool is visible in Concur Invoice, it is currently not available for Concur Invoice clients.

Location Types

Location types fall into two main categories:

- **Standard:** This type includes:
 - ◆ United Nations locations (generally cities)
 - ◆ International Air Transport Association (IATA - airport) locations

- **Rail vendors:** Used to identify various rail vendors' train station within a city; the rail location types available are:
 - ◆ AMTRAK
 - ◆ China Railway
 - ◆ Deutsche Bahn
 - ◆ Eurostar
 - ◆ Japan Public Transportation Stations
 - ◆ SNCF
 - ◆ Swiss Federal Railways
 - ◆ Thalys
 - ◆ UK RAIL
 - ◆ VIA RAIL

NOTE: Currently, the Amtrak stations list in Concur Request is incomplete. There are two avenues to add missing Amtrak train stations:

- A client administrator adds the missing train stations manually or by importing them from the **Locations** page in Administration.

For more information about manually adding a location, refer to the *Add Locations* section in this guide.

For more information about importing locations, refer to the *Shared: Locations Import, Version 2 Specification*.

- Concur Request will automatically add the station, when received in a booking and via the "Travel to Request - Book Then Approve" process flow. Until a missing Amtrak station is added, users cannot manually create a Concur Request segment entry to or from this station.

Please be aware that even after a missing Amtrak station is added, users will not be able to book associated train tickets in Concur Travel when integrated with Request using the "Request to Travel - Approve Then Book" process flow, or the "Request to Travel - Book Then Approve" process flow (in the case where the enforce offline/online feature is activated and the booking is required to be booked directly in Concur Travel).

For more information, refer to the *Authorization Request: Booking Switch Setup Guide*.

NOTE: Concur Request does not support the Japan Public Transportation Stations location type.

NOTE: Concur Travel does not support the China Railway location type.

Some Locations Automatically Available

The locations associated with **some of** the locations types listed above are automatically available in SAP Concur solutions - the administrator does not have to enter them manually or import them.

NOTE: At your request, SAP Concur support can mark Standard location types as "Not-Maintained", but by doing so you are waiving future automatic updates from SAP Concur solutions.

AUTOMATICALLY AVAILABLE

The locations for these location types are automatically available; the administrator does not have to enter them manually or import them:

- The standard list of UN Locations (displays as "Standard" in the **Location Type** column on the **Locations** page)
- These rail station locations are automatically available in Travel. For Travel clients integrated with Request and/or Expense, these locations will be added to Request and Expense when they are used in Travel bookings or in Generic Agency Proposals:
 - ◆ AMTRAK
 - ◆ Deutsche Bahn
 - ◆ SNCF
 - ◆ UK Rail

NOTE: The administrator can view, but not edit, the SAP Concur-maintained locations. Information about changes that are needed can be submitted for consideration to SAP Concur support.

NOTE: Currently, the Amtrak stations list in Concur Request is incomplete. There are two avenues to add missing Amtrak train stations:

- A client administrator adds the missing train stations manually or by importing them from the **Locations** page in Administration.

For more information about manually adding a location, refer to the *Add Locations* section in this guide.

For more information about importing locations, refer to the *Shared: Locations Import, Version 2 Specification*.

- Concur Request will automatically add the station, when received in a booking and via the "Travel to Request - Book Then Approve" process flow. Until a missing Amtrak station is added, users cannot manually create a Concur Request segment entry to or from this station.

Please be aware that even after a missing Amtrak station is added, users will anyway not be able to book associated train ticket in Concur Travel when

integrated with Request using the "Request to Travel - Approve Then Book" process flow, as well as the "Request to Travel - Book Then Approve" process flow (in the case where the enforce offline/online feature is activated and the booking is required to be booked directly in Concur Travel).

For more information, refer to the *Authorization Request: Booking Switch Setup Guide*.

MUST BE ENTERED MANUALLY OR IMPORTED

The locations for these location types must be entered manually or imported by the administrator:


- Additional UN locations loaded by the client, such as additional names for the same city, such as "Florence" and "Firenze" (displays as "Standard" in the **Location Type** column on the **Locations** page)
- These rail station locations:
 - ◆ China Railway
 - ◆ Eurostar
 - ◆ Swiss Federal Railways
 - ◆ Thalys
 - ◆ VIA RAIL

NOTE: Some rail locations may be entered automatically if the company uses Concur Travel integrated with Concur Request.

Before You Begin

Before you add a location, review the following information:

- To add a location, you must have a five-character location code.
- Locations maintained on the United Nations LOCODE standard should use the five-letter code assigned by the United Nations. These codes can be obtained from the United Nations website.
- If a custom code is added, the alphanumeric, five-character code must include both upper and lower-case letters and at least one number (for example, "Abc5E").

 **IMPORTANT:** Custom codes must include a number to avoid conflicting with United Nations LOCODEs for cities.

- Multiple city names can be associated with a single location. For example, if a company requires that a city name be made available to an international group of users, they can add the city's name to the location in all the applicable languages. Providing city names in multiple languages enables users to search using the city name they are familiar with, while maintaining a single location as the reference for reporting purposes.

- Once a location is added, it cannot be removed, but it can be deactivated. This behavior prevents potential errors where existing location codes, on deletion, lose their mapped relations in the database to expenses previously submitted.
- Once a location is added, neither the location code nor the country can be edited. This behavior ensures there is no impact to existing reports/requests that might reference a deleted location code, or impact tax or Travel Allowance configuration mappings that depend on the country for an expense location.
- When a location is deactivated, all cities associated with that location are also deactivated. However, if multiple cities are associated with a single location, a single city can be deactivated while others remain active.
- Locations are updated periodically by SAP Concur. If you want to prevent SAP Concur solutions from updating these codes, disable (uncheck) the **Allow automatic updates to locations** setting on the **Locations > Settings** page.

NOTE: The **Allow automatic updates to locations** setting is enabled (checked) by default.

Section 3: Configuration/Procedures

The procedures below detail how to use the options in the **Locations** tab and the **Settings** tab.

Access the Locations Page

▶ **To access Locations:**

1. Click **Administration > Expense** (or **Invoice** or **Requests**).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Locations** (left menu). The **Locations** page appears.

The screenshot displays the SAP Expense Admin interface for the 'Locations' tab. The top navigation bar includes 'Company', 'Request', 'Travel', 'Expense', and 'Invoice'. The left sidebar lists various administrative tasks, with 'Locations' highlighted. The main content area features a search interface with dropdown menus for 'Country' (set to 'All Countries') and 'System Created' (set to 'All Cities'). There are also input fields for 'Last Modified' and 'Active Status' (set to 'Active Cities only'). A search criteria section includes 'Find Location Where' with dropdowns for 'Location Name' and 'Begins with', followed by a search button. Below the search area are buttons for 'New', 'Modify', 'Activate Selected Cities', and 'Deactivate Selected Cities'. At the bottom, a table header is visible with columns: Active, City, Location Code, Country, State/Province, Is Airport, Airport Name, Parent Location Code, and Adn.

NOTE: When the **Locations** page first appears, no locations are listed. To display a list of locations, perform a search.

Work with the Locations Tab

The procedures below detail how to use the options on the **Locations** tab.

Search for Locations

Use the **Locations** page to access all locations available in Expense, Invoice, or Request. In this page, you can search for locations that are:

- Added manually
- Imported
- Automatically generated by the system

NOTE: When you use the Hotel Booking feature and the travel allowance rate to calculate costs, the system automatically creates cities, etc. to match hotel locations and gather rates.


Field	Description
Find Location Where	<ol style="list-style-type: none"> Select one of these: <ul style="list-style-type: none"> ◆ Location Name ◆ Subdivision Name (State/Province) ◆ Administrative Region ◆ Location Code Select the operator: <ul style="list-style-type: none"> ◆ Begins with ◆ Contains ◆ Ends with ◆ Equals Enter part or all of name.
<i>Optional - use the second row to refine the search criteria:</i>	
Find Location Where	<ol style="list-style-type: none"> Select one of these: <ul style="list-style-type: none"> ◆ Location Name ◆ Subdivision Name (State/Province) ◆ Administrative Region ◆ Location Code Select the operator: <ul style="list-style-type: none"> ◆ Begins with ◆ Contains ◆ Ends with ◆ Equals Enter part or all of name.

- Click **Search**. The **Locations** page refreshes and returns a list of locations matching the search criteria. The figure below shows a sample list of those locations where the location name equals *dallas*:

The screenshot shows the SAP Locations Setup interface. The search criteria are: Country: UNITED STATES, System Created: All Cities, Active Status: Active Cities only, and Find Location Where: Location Name Begins with dallas. The search results table is as follows:

Active	City	Location Code	Country	State/Province	Is Airport	Airport Name	Parent Location Code	Adn
Active	Dallas	USDAE	UNITED STATES	Oregon	No			f
Active	Dallas	USDAL	UNITED STATES	Texas	No			f
Active	Dallas	USDLX	UNITED STATES	Georgia	No			f
Active	Dallas	USDSP	UNITED STATES	Pennsylvania	No			f
Active	Dallas	IATA_DFW	UNITED STATES	Texas	Yes	Dallas Ft Worth...	USDAL	f
Active	Dallas	IATA_DAL	UNITED STATES	Texas	Yes	Love Field	USDAL	f
Active	Dallas	IATA_ADS	UNITED STATES	Alabama	Yes	Addison	USADS	f
Active	Dallas	IATA_DFW	UNITED STATES	Texas	Yes	Dallas/Fort Worth	USDAL	f
Active	Dallas	IATA_DFW	UNITED STATES	Texas	Yes	Intern. de Dallas	USDAL	f

Use the table below to understand what each column displays:

Field	Description
Active	Indicates if the location is active or inactive
City	City name There can be one or more city names associated with a location code.
Location Code	A unique alphanumeric, five-character code without any spaces, created using any combination of the following characters: ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz 0123456789 Example: "Abc5E" This code is determined by the client's internal coding system and is not localized. NOTE: Include a number to avoid any conflict with United Nations naming conventions for cities.
Country	The country that contains the location
State/Province	If applicable (depends on the Country field), the state or province in which the city is located
Is Airport	Indicates if this location is an airport (see below for an example)
Airport Name	If this location is an airport, this column lists the airport name (see below for an example)
Parent Location Code	If this location is an airport, this column lists the location code of the "parent" location (see below for an example)
Administrative Region	Depending on the country, the applicable region (generally defines as "county") appears. NOTE: The counties for the United States are provided by SAP Concur solutions. If you want regions/counties for any other country, use the Locations import to import them.  Refer to the <i>Shared: Locations Import, Version 2 Specification</i> .
Time Zone Offset	Type the number of minutes from Greenwich Mean Time (GMT). This is the location time zone offset from GMT, in minutes. Time zones to the West of GMT are negative. Example: Seattle would be -8 hours GMT, or -8h x 60m = -480m. This number calculates reimbursements for features based on time and location, such as travel allowance.

Field	Description
Location Type	<p>One of these appears:</p> <ul style="list-style-type: none"> • For a UN location or an airport location: Standard • For rail: <ul style="list-style-type: none"> ◆ AMTRAK ◆ China Railway ◆ Deutsche Bahn ◆ Eurostar ◆ Japan Public Transportation Stations ◆ SNCF ◆ Swiss Federal Railways ◆ Thalys ◆ UK RAIL ◆ VIA RAIL

EXAMPLE

The screenshot shows the SAP Locations Settings interface. The search filters are set to: Country: UNITED STATES, System Created: All Cities, Active Status: Active Cities only, and Find Location Where: Location Name Begins with dallas. The table below shows the results, with the 'Is Airport' column circled in red and two rows highlighted in yellow.

Active	City	Location Code	Country	State/Province	Is Airport	Airport Name	Parent Location Code	Adn
Active	Dallas	USDAE	UNITED STATES	Oregon	No			
Active	Dallas	USDAL	UNITED STATES	Texas	No			
Active	Dallas	USDLX	UNITED STATES	Georgia	No			
Active	Dallas	USDSP	UNITED STATES	Pennsylvania	No			
Active	Dallas	IATA_DFW	UNITED STATES	Texas	Yes	Dallas Ft Worth...	USDAL	
Active	Dallas	IATA_DAL	UNITED STATES	Texas	Yes	Love Field	USDAL	
Active	Dallas	IATA_ADS	UNITED STATES	Alabama	Yes	Addison	USADS	
Active	Dallas	IATA_DFW	UNITED STATES	Texas	Yes	Dallas/Fort Worth	USDAL	
Active	Dallas	IATA_DFW	UNITED STATES	Texas	Yes	Intern. de Dalla...	USDAL	
Active	Dallas	IATA_DFW	UNITED STATES	Texas	Yes	Intern Dallas Ft...	USDAL	
Active	Dallas	IATA_DFW	UNITED STATES	Texas	Yes	Int. Dallas Ft W...	USDAL	
Active	Dallas	IATA_DAL	UNITED STATES	Texas	Yes	Logan Field	USDAL	

In this example, note the following:

- In the first yellow bar above shows the city of Dallas, Texas (**Location Code** column = USDAL; **Is Airport** column = No).
- In the second yellow bar above:
 - ◆ Shows the Dallas Ft Worth International Airport in Dallas (**Location Code** column = IATA_DFW; **Is Airport** column = Yes; **Parent Location Code** column = USDAL)
 - ◆ Shows the Love Field in Dallas (**Location Code** column = IATA_DAL; **Is Airport** column = Yes; **Parent Location Code** column = USDAL)

Add Locations

Note that when you add a location, it cannot be deleted. If you do not want users to view the location in Expense/Invoice/Request, you must deactivate the location.

You can also add locations using the Locations import.



Refer to the *Shared: Locations Import, Version 2 Specification*.

► To add a location:

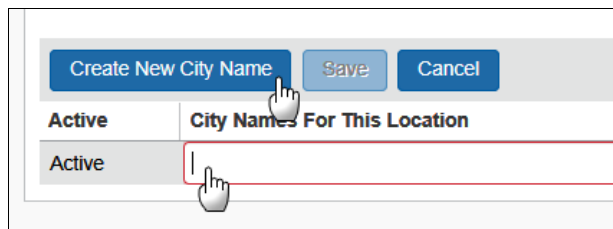
1. On the **Locations** tab of the **Locations** page, click **New**. The **Add Location** page appears.

2. Complete all required fields.

Field	Description
Location Type	<p>Select one of the following:</p> <ul style="list-style-type: none"> • For an additional UN location or an airport location, select Standard • For rail, select one of the following: <ul style="list-style-type: none"> ◆ AMTRAK ◆ China Railway ◆ Deutsche Bahn ◆ Eurostar ◆ Japan Public Transportation Stations ◆ SNCF ◆ Swiss Federal Railways ◆ Thalys ◆ UK RAIL ◆ VIA RAIL

Field	Description
Location Code	<p>Enter a unique alphanumeric, five-character code without any spaces using any combination of the following characters:</p> <p>ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz 0123456789</p> <p>Example: "Abc5E"</p> <p>This code is determined by the client's internal coding system and is not localized.</p> <p>Note: Include a number to avoid any conflict with United Nations naming conventions for cities.</p>
Country	Select a country from the list. Type the first letter of the country to move to the desired selection more quickly.
State/Province	<p>This field may or may not appear, depending on the selection in the Country list.</p> <p>If the field appears, choose a state or province.</p>
Administrative Region	<p>This field appears if you select <i>United States</i> from the Country list. If you import administrative regions (counties) for another country, then this field appears when you select that country.</p> <p>Select the appropriate county/region name.</p>
Time Zone Offset	<p>Type the number of minutes from Greenwich Mean Time (GMT). This is the location time zone offset from GMT, in minutes. Time zones to the West of GMT are negative.</p> <p>Example: Seattle would be -8 hours GMT, or -8h x 60m = -480m.</p> <p>Use this number to calculate reimbursements for features based on time and location, such as travel allowance.</p>
Active Status	Select Active or Inactive to make the location active or inactive. When you do this, all cities associated with this location also become active or inactive.

3. Click **Create New City Name**. A text box appears in the **City Names For This Location** column.



4. Complete the appropriate fields.

Field	Description
Active	Active is selected by default, and the city is available when you save. To prevent this city from being active (appearing to users), click <i>Active</i> to open the list, then select <i>Inactive</i> .

Field	Description
City Names For This Location	Type the name of the location name (city).

5. **Optional:** Repeat step 3 to add as many cities as are required. Additional city names are added if the city must be available for selection under different languages (for example, Florence and Firenze).
6. Click **Save**.

Edit Locations

Note the following:

- The administrator is limited to:
 - ◆ Editing the state/province, time zone offset, and active status
-
- NOTE:** The administrator cannot change the **Location Type**, **Location Code**, and **Country** fields (they are read-only) due to configuration mappings that must be maintained in the database.
-
- ◆ Adding more cities using the **Create New City Name** link
 - When viewing or modifying an airport location, the IATA field appears but it is read-only.

When performed through SAP Concur solutions (as opposed to an import), changes to locations take effect immediately.

▶ To edit a location:

1. On the **Locations** tab of the **Locations** page, either:
 - ◆ Click the desired location and click **Modify**.
– or –
 - ◆ Double-click the desired location.

The **Modify Location** page appears.

The screenshot shows the 'MODIFY LOCATION' page. It includes the following fields and values:

- Location Type: Standard
- Location Code: USDAL
- Country: UNITED STATES
- State/Province: Texas
- Administrative Region: DALLAS COUNTY
- Time Zone Offset: -360

Buttons: Create New City Name, Save, Cancel

Active	City Names For This Location
Active	Dallas

2. Make any necessary changes.



Refer to *Adding Locations* for more information about fields and options on this page.

3. Click **Save**.

Activate and Deactivate Locations

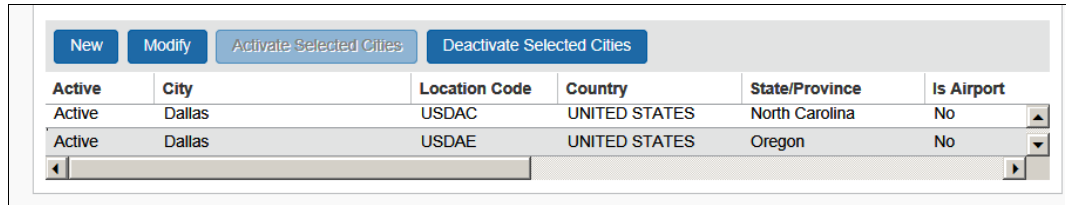
Locations cannot be deleted. Instead, deactivate a location to prevent it from appearing in SAP Concur solutions. A location is deactivated in its entirety, removing all city names from user view. When reactivated, all cities are again available in the list of cities.

▶ To deactivate or activate a location:

1. On the **Locations** tab of the **Locations** page, search for the desired location.

NOTE: Using Ctrl + Shift, select one or more locations as required in the location grid.

2. Click **Activate Selected Cities** or **Deactivate Selected Cities**.



The location state changes and the page refreshes.

NOTE: You can also activate or deactivate a city while modifying a location as described in *Editing Locations* in this guide.

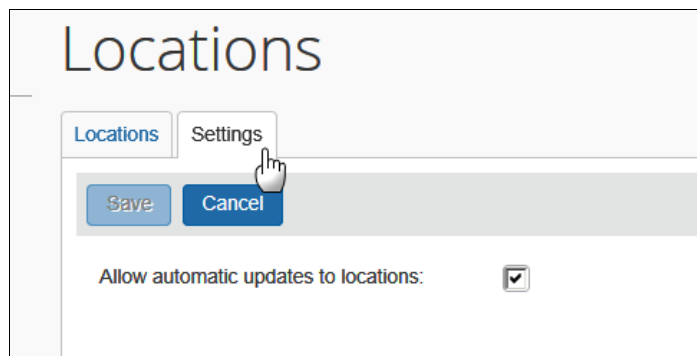
Work With the Settings Tab

The procedures below detail how to use the options in the **Settings** tab.

Access the Settings Tab

- ▶ **To access Locations:**

On the **Locations** page, click the **Settings** tab.



Automatic Updates to Locations

You can enable or disable automatic updates to locations on the **Settings** tab. When the **Allow automatic updates to locations** setting is enabled (checked), updates provided by SAP Concur solutions are automatically pushed out to the client's Locations database.

⚠ IMPORTANT: If you disable the **Allow automatic updates to locations** setting, you must maintain the list of locations. In addition, if you disable automatic updates for a period of time, and then re-enable the setting, SAP Concur solutions cannot retroactively update location data that changed while automatic updates were disabled – only updates that occur after the setting is re-enabled will be applied.

▶ ***To disable automatic update of Locations:***

On the **Settings** tab, disable (uncheck) the **Allow automatic updates to locations** setting.