

Concur Travel: Import Data

Travel Service Guide

Last Revised: October 19, 2020

Applies to Concur Travel:

- ☒ Professional/Premium edition
 - ☒ TMC Partners
 - ☒ Direct Customers
- ☒ Standard edition
 - ☒ TMC Partners
 - ☒ Direct Customers

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Revision History

Date	Revision Notes/Comments
July 25, 2023	Updated Overview section with note on SAP Concur UI themes; no other changes
January 14, 2022	Updated the copyright year; no other changes; cover date not updated
April 14, 2021	Updated the copyright year; no other changes; cover date not updated
October 19, 2020	Republication to correct format.

Import Data

Section 1: IMPORTANT – About this Guide

Be aware of the following:

- **Infinite variables:** Certain scenarios have an infinite number of variables or extremely unusual circumstances, like rare cancellation or refund situations. So, not all scenarios can be presented in this guide. Also, certain processes may be influenced by third- or fourth-party providers. In some cases, you must contact the provider directly.
- **User interface, fees, rates, schedules:** When other providers change their user interface (for example, web site) or their fees/rates/schedules, they are under no obligation to make SAP Concur aware of those changes. If a screen sample in this guide is outdated because of a change made by a provider, we will update that screen sample when we become aware of the change and at our earliest convenience.
- **Permissions:** A company's admin may or may not have the correct permissions to manage the feature described in this guide. If an admin needs to manage this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the admin should be aware that some of the tasks described in this guide cannot be completed by the company. In this case, the client must contact their TMC (if a TMC provides their support) or SAP Concur representative (if SAP Concur provides their support).

Section 2: Professional and Standard Travel

Features in this guide may apply to Professional, Standard, or both. The applicable editions are listed in the specific feature information.

Section 3: Overview

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

The Import Data tool has been created to make the process of importing Concur Travel data available to Travel System Administrators. Import templates are available for download and used by the Administrator to populate with import data. The populated template file will be used to create an import task which is scheduled for import. Results from the import are available for the Travel System Administrators upon completion of the import.

Section 4: How it Works

The instructions below demonstrate how to:

- Obtain import templates
- Schedule the load of a template file
- Check the progress of the import
- Check the status once completed

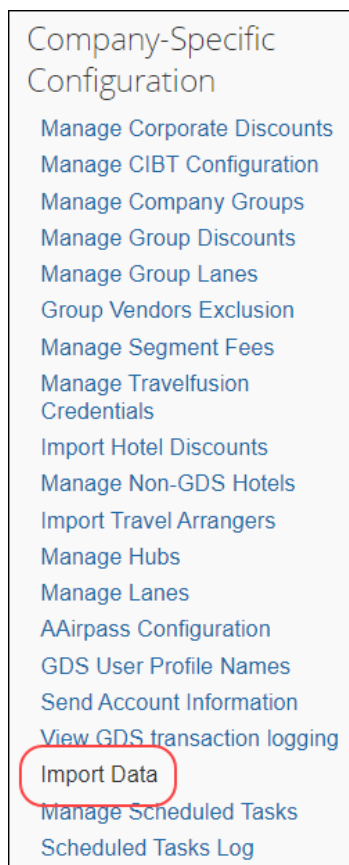
Access the Import Data

► **To access the data:**

1. Click **Administration > Travel** (on the sub-menu) > **Travel System Admin**.

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

2. Click **Import Data** in the left menu. The **Manage Import Tool Tasks** page appears.



3. Enter the company name in the **Company** field and then click **Search**. This will retrieve the list of import tasks that have been processed for this company or are scheduled to be processed. The results and status of these import tasks are then available for review.

► **To access the import templates:**

1. Click the **Import formats samples** link.

The **Import Tool Data Formats** page appears.

From the **Import Tool Data Formats** page, you can download the import template that is relevant for the import task you wish to create. Populate the data for import using the relevant template. The header row in each template provides popovers with instructions on how to populate the spreadsheet with accurate and appropriate data. The template must be saved as XML Spreadsheet data (*.xml) as documented in the **Important Information** section of this page. Only these XML documents are permitted for import.

NOTE: To remove credit cards, you now need to use the “credit cards” import template to remove cards. This can be accomplished by setting the value in the **Active** column to 0 (1 = active).

Importing users simplifies your company administration tasks by providing a way to add data you may already have in another database.

[Download](#) Excel import template: user general information, travel preferences, frequent flyer programs, managers, travel arrangers and custom fields and advantage programs (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: credit cards (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: company locations (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: user group membership (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: user level system settings (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: user login update (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: profile sync queue (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: custom field drop down values (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: travel profile sync last update (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: org units (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: unused tickets (last modified on 07/29/2020 02:01 pm).

[Download](#) CSV import template: unused tickets (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: regional hotel rates (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: government user data import (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: government user data for credit card tokens (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: CBAs to Org Units (last modified on 07/29/2020 02:01 pm).

[Download](#) Excel import template: centrally billed accounts (last modified on 07/29/2020 02:01 pm).


Important Information

Data Import can use Excel spreadsheets saved as XML Spreadsheet (*.xml) data. Simply populate the fields in downloaded template save it and upload the XML file in the import data section. You should not change column titles, delete columns or change worksheets names unless there is specific instructions to do that.


► **To add an import task:**

1. Click the **+ Add Task** link. The **Details** popup window appears.

Search for tasks:

Company  oA.com

oA (852340) [Search](#) [Add Task](#) [Import formats samples](#)

Details 

Description

Upload file

[Choose File](#) Service_Admins_Info.xlsx Mode

Company Import Type Scheduled for

oA (852340) All User Data Import Fror Saturday night

[Save](#) [Cancel](#)

2. Fill out the **Description** field with an accurate description of the import task to be created.
3. To select and upload the file, click **Browse**.

4. Select the check box to indicate if the import is a test. If it is a test import, an error report will be produced explaining what will happen if the import is not run in test mode. No changes are made to the database when the import task is run in test mode.

NOTE: It is recommended that the import task is initially setup as a test import, and if the results are satisfactory, the import can be run again in a live mode. Imports cannot be reversed when run non-test mode.

5. Confirm the accuracy of the selected company shown in the **Company** search box. Change if the selected company is not correct.
6. Select the import type that matches the import task.
7. Select the *Scheduled for* value that is appropriate for the import task you are creating. Selecting *Another task completion...* from the dropdown list will allow you to chain this import task to another so that they occur in a specific order.
8. Click **Save** to save this import task and it will then appear in the **Manage Import Tool Task** list displaying the information you configured.

The newly created import task will appear in the list. The **Scheduled for** column will indicate a rough estimate for when this import task will be processed. You can use the two icons on the right of the task information to do the following:

- ◆ View the **Properties** of the import task
- ◆ **Delete** the task.

Search for tasks: Company oA.com oA (852340) <input type="button" value="Search"/> Add Task Import formats samples									
Description	Import Type	Status	Test	Scheduled for	Started	Completed	Updated	User	
0.1 Update First and Last Names	All User Data Import From Excel		<input checked="" type="checkbox"/>	2020/08/01 17:06:00			2020/07/30 09:37:29	mlore	

NOTE: To edit the task configuration if it has not begun processing, click **Properties**.

9. Completion of the import task is indicated by the presence of a date/time on the **Completed** column and an indication in the **Status** column if there was an error.

The properties icon will display the details of the completed import. If the import contained an error, the results can be downloaded by clicking the **Download results** link, which will prompt the download of a Microsoft Excel XML file. This file should be opened in Excel and you can find the error messages are stored in the **Error** column on the Excel worksheet.

The screenshot shows a 'Details' dialog box with the following fields and sections:

- Description:** Update First and Last Names
- Mode:** Test (dropdown menu)
- Company:** Outtask, Inc.
- Import Type:** User Data from Excel (dropdown menu)
- Scheduled for:** 01/05/2007 2:45 PM Eastern (dropdown menu)
- Started:** 01/05/2007 3:40 PM Eastern
- Completed:** 01/05/2007 3:40 PM Eastern
- Updated:** 01/05/2007 3:40 PM Eastern
- Error:** (checkbox, currently unchecked)
- Log:**
 - 3:40:39 PM: Processing started (User Data from Excel).
 - 3:40:41 PM: Done. 3 rows processed
- OK** button at the bottom.

Section 5: Profile Sync Process

There are three parts to the Concur Travel profile sync:

- Setting up the profile template
- Uploading the Profile Sync Queue xml file
- Profile synchronization process

Concur Travel profile information can be saved from Concur Travel to the GDS, or synced from the GDS to Concur Travel. Although the process is typically called "Profile Sync", it can describe information moving in either direction.

In order to use the Concur Travel Profile Sync template, the customer must be using a Concur Travel profile template. In order to save profiles from the Concur Travel to the GDS, the travel configuration must have **Save profiles to GDS** checked. Likewise, in order to sync profiles from the GDS to Concur Travel, the travel configuration must have **Sync profiles from the GDS** checked.

The screenshot shows the 'GDS/Profile Synchronization' configuration section with two checked options:

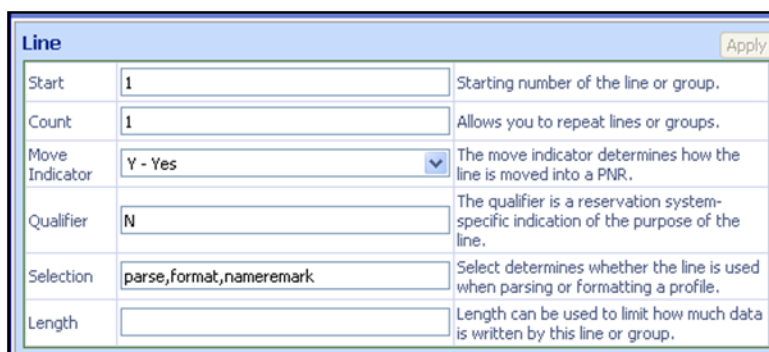
- ☒ **Save profiles to GDS**
If checked, Cliqbook will save the user's profile to the GDS when he or she saves it in Cliqbook.
- ☒ **Sync profiles from GDS**
If checked, Cliqbook will read the user's profile from the GDS and synchronize it into the database when the user views his or her profile.

Section 6: Setting Up the Profile Template

Concur Travel profile sync is driven by the Concur Travel profile template. If the company uses a third-party profile tool and doesn't use Concur Travel for profiles, that company won't be able to use the Concur Travel profile sync until there is a profile template in place.

► **To set up the profile template:**

1. Find the Concur Travel profile template and click **Edit**.
2. On the **Line Definitions** tab, you will see a list of lines for the profile template. Click the line number at the beginning of the line to see the properties for that line:



The screenshot shows a window titled "Line" with an "Apply" button in the top right corner. It contains a table with six rows, each with a label, a value field, and a description:

Label	Value	Description
Start	1	Starting number of the line or group.
Count	1	Allows you to repeat lines or groups.
Move Indicator	Y - Yes	The move indicator determines how the line is moved into a PNR.
Qualifier	N	The qualifier is a reservation system-specific indication of the purpose of the line.
Selection	parse,format,nameremark	Select determines whether the line is used when parsing or formatting a profile.
Length		Length can be used to limit how much data is written by this line or group.

The **Selection** line shows the value for the profile sync. This value determines which lines will be included when the profile sync runs. For most templates, it is standard to have the word 'format' on every line, which indicates that when the user saves his or her profile, this line will save from Concur Travel to the GDS.

Most lines will also contain the word "parse." This indicates that the line will sync from the GDS to Concur Travel when the profile sync is initiated. There are some fields that do not sync from the GDS to Concur Travel, typically lines with only those fields do not have 'parse' in the selection field.

The value in the **Selection** field must be added to the profile sync option, which will be described in the next step. You can add additional values here, such as "e-mail" to lines that will be part of a sync to the GDS for e-mail addresses, or "ces" to designate which lines will sync to the GDS after an expense integration.

! **IMPORTANT:** When adding additional values in the selection field do not put spaces between them, only commas.

- Make sure to save the line if you modify the information in the selection field for that line. When you are finished, click the **Template Configuration** tab.

- Choose which profile sync option to use. There are two default options that are part of every profile template: *Concur TraveltoGDS* and *GDS toConcur Travel*.

Setting	Value
GdsToCliqbook tag	parse
CliqbookToGds tag	format

The **Setting** is the actual name of the sync, and the **Value** is the value that determines which lines will sync.

- If you choose **GdsToConcur Travel**, Concur Travel will sync any line with "parse" as a value in the selection field from the GDS to Concur Travel.
 - If you choose *Concur TraveltoGDS*, Concur Travel will sync any line with "format" as a value in the selection field from Concur Travel to the GDS.
- To add additional lines. Click **Add Option** and enter the name of the sync in the **Setting** field. It should be brief but descriptive, such as *SyncCustomGDS toCB* or *SyncCESCB toGDS*.
 - Enter the *value*. Keep in mind that this value must be in the selection field for every line this sync applies to. Concur Travel will only sync the lines with that value in the field. Click **Save**.

Setting	Value
TravelScreen POP	
Check Profile Exist	
SyncCreditCliqbookToGds	credit
SyncEmergCliqbookToGds	emerg
Syncnamemark	namemark

General Options

Nameformats: Nameformats specifies how the name of the reservation system profile is created, based on the user's name. This field is specified by a comma-separated list of individual format strings. Format strings may have the following characters:

Symbol	Description	Symbol	Description
L	Last name	LI	Last initial
F	First name	FI	First initial
M	Middle name	MI	Middle initial
N	Nickname	NI	Nickname initial
E	Employee ID number (EIN)	EI	EIN (spaces removed)

- Once you have completed these steps, click the **Publishing** tab and publish the template. It is usually a good idea to make a note of what you changed in the template in the **Comments** field.

Section 7: Profile Sync Queue Import

► To import the Profile Sync Queue:

- Once the profile sync option is configured, download the profile sync queue template.

Download	Excel import template: user general information, travel preferences, frequent flier programs, managers, trav
Download	Excel import template: credit cards (last modified on 05/16/2007 4:51 AM).
Download	Excel import template: delete credit cards (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: company locations (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: user group membership (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: user level system settings (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: user login update (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: profile sync queue (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: custom field drop down values (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: travel profile sync last update (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: org units (last modified on 01/31/2007 4:14 AM).
Download	Excel import template: unused tickets (last modified on 05/08/2007 9:15 AM).
Download	CSV import template: unused tickets (last modified on 04/25/2007 10:58 AM).

- There are three columns in the template: **Login ID**, **Target**, and **Sync Option**. Enter any login ID that should be synced in the **Login ID** column. If this should be every active user in the company, download a list of login IDs from the **Employee Details** report and cut and paste it here. In the Target column, enter either Concur Travel or GDS. Regardless of what the name of the profile sync option is, this column determines which way the sync will process.

! **IMPORTANT:** Once the profile sync runs, it is very difficult if not impossible to undo the changes, so please check and double check the target in this column. If you choose Concur Travel when you should choose GDS, the information in the GDS will overwrite what is in Concur Travel, you will not be able to retrieve the lost information. Make sure to copy this value into every row of the spreadsheet.

3. In the **Sync Option** column, put the name of the profile sync option.
 - ♦ If you want to sync all lines from Concur Travel to the GDS, choose the standard template *Concur TraveltoGDS*. The profile sync options should be written exactly as it is on the template configuration tab in the profile template. Make sure to verify that every line you want saved has the value format in the selection field in the properties for that line.
 - ♦ If you want to parse all lines from the GDS to Concur Travel, choose the standard template *GDS to Concur Travel*. The profile sync option should be written exactly as it is on the template configuration tab in the profile template. Make sure to verify that every line you want to parse has the value "parse" in the selection field in the properties for that line.
 - ♦ If there is a custom profile sync option you want to use, make sure you have set it up correctly in the profile template, and enter it here. The profile sync option should be written exactly as it is on the template configuration tab in the profile template. Make sure to verify that every line you want to parse has the value you chose for the profile sync option in the selection field in the properties for that line.
 - ♦ Once you enter the profile sync option, make sure to copy it into every row of the spreadsheet. Save the spreadsheet as an xml file, and then import it using the same instructions as other templates.
 - ♦ Once the spreadsheet process is finished, the profiles you wish to sync will be added to the profile sync queue. This queue can sometimes take a while to process.

Section 8: Profile Synchronization Process

Concur Travel processes every login ID in the list. If the instructions are to run *Concur TraveltoGDS*, Concur Travel will save any line in the profile template with "format" as a value in the selection line to the GDS. If the profile doesn't exist in the GDS, as long as a value exists in the GDS profile name for that traveler, the profile will be created in the GDS. If information exists in the line for a particular profile, it will be overwritten.

Once the process runs, you can verify and check for errors using the **Scheduled Tasks** log in travel system admin.

► To synchronize profiles:

1. Click **Scheduled Tasks** log.

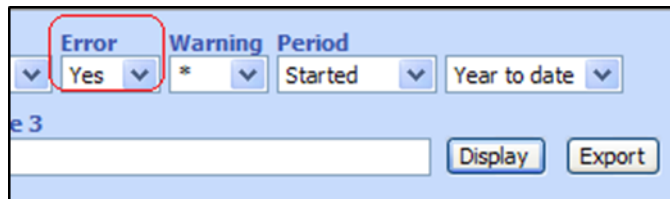
Company	Instance	Job	Error	Warning	Period
Concur Travel Service (2324)	*	*			Started

Value 1: Value 2: Value 3:

Display Export

2. Enter the name of the company and the period when the sync ran. If you aren't sure, put in a date range, but limit the range as much as possible to define your results as much as possible.

3. If you only want to see errors, choose **Yes** in the **Error** column. In the **Value 2** field, enter the target: either **Concur Travel** or **GDS**.



The screenshot shows a filter interface with the following elements:

- Error** dropdown: Set to **Yes** (highlighted with a red box).
- Warning** dropdown: Set to *****.
- Period** dropdown: Set to **Started**.
- Year to date** dropdown: Set to **Year to date**.
- Search bar: Contains the text **e 3**.
- Display** button.
- Export** button.

4. To see the results of the sync, click **Display**.

Section 9: Import Hotel Discounts

Use the **Import/Export Hotel Discounts** option to import hotel property discounts and notes. This feature imports data in an Excel spreadsheet or a comma-separate-value (CSV) text file.

NOTE: SAP Concur solutions strongly recommends that you use the CSV file.

You can access this feature by clicking **Manage Corporate Discounts > Import Properties** (in the property-specific hotel discount section) in the Travel System Admin left-side menu, or by clicking **Import Hotel Discounts** in the **Travel System Admin** left-side menu.

Section 10: Import Instructions

Use this section to provide any property-specific information you want the user to see during the booking process. This information includes:

- **Property ID:** GDS Property ID for a specific hotel property. This property ID will vary by GDS. (mandatory field)
- **Chain Code:** Chain code for the property (mandatory field)
- **Hotel Name:** Name of the hotel (mandatory field)
- **Discount Code:** Consortium discount code
- **CD Number:** Discount code for the company/customer
 - ♦ Additional information around what can be entered in this field:
 - HTML is not supported.
 - There is a character limit of 255 characters.
 - These special characters are accepted:
 - * \$ (dollar sign)
 - * * (asterisk)
 - * - (dash)
 - * , (comma)
 - * Any other characters present in the **Notes** column can cause hotel availability for the same city matching the preferred hotel not to be returned. For example, if an unsupported character is present in the **Notes** column for a preferred hotel in Chicago, it may prevent all hotel availability from being returned for Chicago.
- **Country Code:** Use the two letter ISO country code to determine the currency for a hotel rate. Country codes can be found on the second tab of the import doc, or at the following link: http://www.iso.org/iso/english_country_names_and_code_elements. If the column is not populated, SAP Concur solutions will assume the agency PCC's currency **Contract Rate:** contract rate for the property
- **Preference:** Preference ranking for the property (mandatory field):
 - ♦ 10 = Most Preferred
 - ♦ 5 = Preferred
 - ♦ 4 = Less Preferred
 - ♦ 1 = Not Preferred
- **Breakfast/Internet/Parking/Wireless Fee:** Use these fields to advise travelers during the booking process of free or negotiated amenities for specific properties. Freeform text as well as dollar amounts are accepted in these fields (i.e., included in company rate only, \$25).

- **Seasonal Rate 1-6:** Set up to six seasonal contract rates for property-specific hotels.
- **Seasonal Rate 1-6 start/end date:** Each seasonal rate must have a start date and end date (month, day, and year). When a hotel is booked, Concur Travel will use the check-in date to look up the appropriate contract rate. Concur Travel will default to the existing contract rate if there are no seasonal rates loaded, or if no seasonal rate matches the given check-in date.

Section 11: Import Best Practices

It is recommended that users adopt the following best practices:

- Export existing properties first - this process copies your template into the most current .csv format and creates a new replica (in case SAP Concur solutions has added or removed columns since your last import).
- Never change column labels.
- Proofread your import file before uploading it – changes cannot be reversed, except by re-importing.
- Immediate results appear on-screen for review (usually within 20 seconds). An email is also sent to you with errors listed below the property in red font.

