

Shared: Locations

Setup Guide

Last Revised: September 27, 2018

Applies to these SAP Concur solutions:

- Expense
 - Professional/Premium edition
 - Standard edition
- Travel
 - Professional/Premium edition
 - Standard edition
- Invoice
 - Professional/Premium edition
 - Standard edition
- Authorization Request
 - Professional/Premium edition
 - Standard edition

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Revision History

Date	Notes/Comments/Changes
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
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" – no other content changes
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.

Date	Notes/Comments/Changes
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 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 Concur administrator.

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by Concur. In this case, the client must initiate a service request with Concur Client 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 Expense, Invoice, and Request. This list lets an employee 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 or deactivate a location, removing it from user view

NOTE: Although the Locations tool is visible in Invoice, it is currently not available for 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 station list in Concur is incomplete. Any missing Amtrak train stations can be entered manually or imported by the client administrator.

Please be aware that if an Amtrak station has never been booked, the station may not be available for selection in Request until the administrator adds the missing station.

Until a missing Amtrak station is added, users cannot manually create a segment to or from this station, and if the "Approve then book" workflow is being used in Request, they cannot book a train ticket for this station.

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 Concur - the administrator does not have to enter them manually or import them.

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

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 may view, but not edit, the Concur-maintained locations. Information about changes that are needed may be submitted for consideration to Concur Client Support.

NOTE: Currently, the Amtrak station list in Concur is incomplete. Any missing Amtrak train stations can be entered manually or imported by the client administrator.

Please be aware that if an Amtrak station has never been booked, the station may not be available for selection in Request until the administrator adds the missing station.

Until a missing Amtrak station is added, users cannot manually create a segment to or from this station, and if the "Approve then book" workflow is being used in Request, they cannot book a train ticket for this station.

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

Prior to adding a location, review these important points:

- When adding a location, a location code is required. Locations maintained on the United Nations LOCODE standard should use the five-letter code assigned by the United Nations (for example, US NYC). If a custom code, the alphanumeric, five-character code must be mixed-case (for example, "Abc5E").

 **IMPORTANT:** Custom codes must include a number to avoid any conflict with United Nations LOCODE naming conventions for cities.

- Multiple cities (city names) can be associated with a single location. If a company requires that a city be made available to an international group, the best practice is to provide cities in all applicable languages. Providing cities in multiple languages ensures that employees can perform a 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, the only action that can be taken to remove the existing city is to deactivate the location. 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, a single city can be deactivated while others remain active (where multiple cities are associated with a single location).
- Locations are updated periodically by Concur to the latest United Nations LOCODE list. If you want to prevent Concur from updating these codes, use the **Allow automatic updates to locations** available on the Locations **Settings** tab (the check box is selected by default, meaning that Concur location maintenance updates will be automatically applied to your company's list of Locations).

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.

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.

To search, use this section of the page:

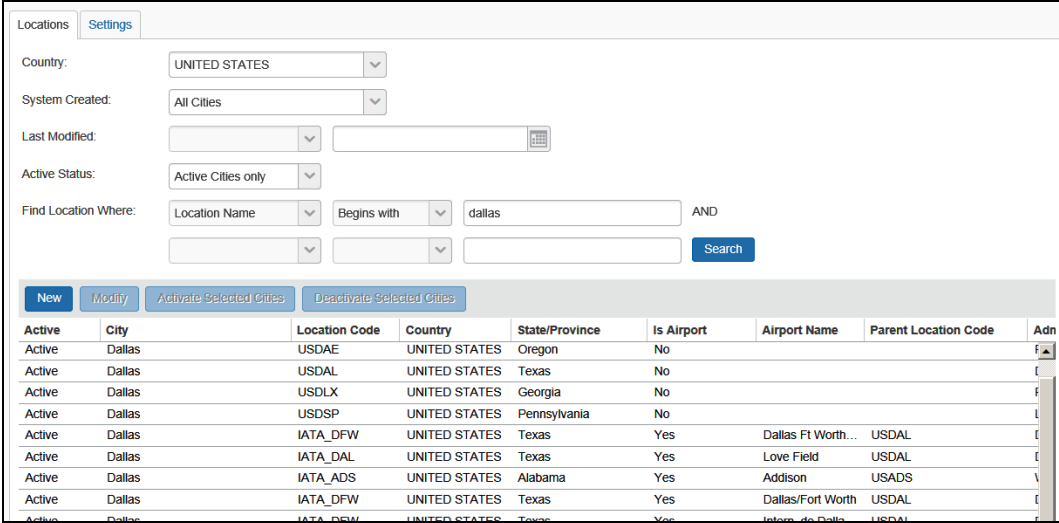
► **To search for a location:**

1. On the **Locations** tab of the **Locations** page, select or type the desired criteria:


Field	Description
Country	Click the desired country.
System Created	Click one of these: <ul style="list-style-type: none"> • System Created Cities: This lists the cities that are created automatically by Concur (for example, for travel allowances). • Non System Created Cities: This lists manually created cities or imported cities • All Cities: both of the above
Last Modified	Select a specific timeframe to search.
Active Status	Click one of these: <ul style="list-style-type: none"> • Active cities only: (<i>Default</i>) List all cities that are currently active • Inactive cities only: List all cities that are currently inactive • All cities: both of the above

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.

2. 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*:



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 Concur. 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 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:

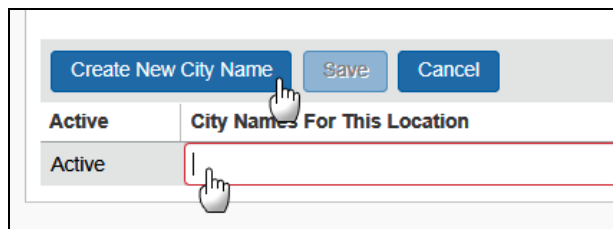
1. On the **Locations** tab of the **Locations** page, click **New**. The **Add Location** page appears.

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 Concur (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 displays the 'MODIFY LOCATION' form. At the top, there are tabs for 'Locations' and 'Settings'. The form fields are as follows:

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

Below the form are three buttons: 'Create New City Name', 'Save', and 'Cancel'. Underneath the buttons is a table with two columns: 'Active' and 'City Names For This Location'.

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

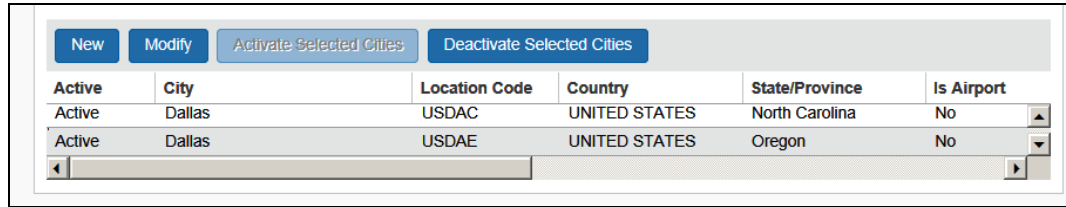
Locations cannot be deleted. Instead, deactivate a location to prevent its appearance in Concur. A location is deactivated in its entirety, removing all city names from user view. When reactivated, all cities are again available in the list of cities.

▶ 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.

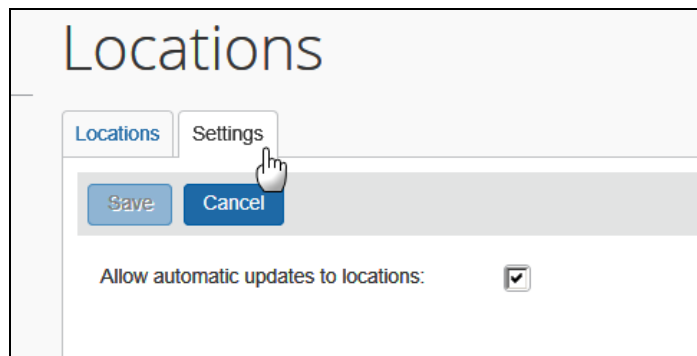
Work With the Settings Tab

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.



Available Setting

Use the **Settings** tab to allow or disallow automatic updates from Concur. When the **Allow automatic updates to locations** check box is enabled, updates provided by Concur are pushed out to the client's Locations database, for example, when periodic United Nations LOCODE updates are due.

⚠ IMPORTANT: Once disabled, it will be the responsibility of the client to maintain their list of locations. Further, Concur cannot retroactively identify and update location data for a client during the disablement period should the client elect to re-enable the setting – only changes going forward from the date the setting is reactivated will be delivered by Concur.

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

On the **Settings** tab, clear (disable) the **Allow automatic updates to locations** check box.