Shared: Imaging Settings

Setup Guide

Last Revised: November 1, 2022

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
November 1, 2022	Removed references to faxing as part of the fax feature decommissioning on November 1, 2022.
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
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
September 30, 2019	Renamed the *Expense: Receipt Handling – Uploaded and Emailed Images Setup Guide* to *Expense: Receipt Handling – Digital Receipts Setup Guide*
February 11, 2019	Updated the copyright; no other changes; cover date not updated
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
March 5, 2018	Updated the copyright; no other changes; cover date not updated
December 14, 2016	Changed copyright and cover; no other content changes.
April 30, 2015	Removed information about the old UI; no other content changes
January 16, 2015	Updated the screen shots to the enhanced UI and made general updates to the content
October 3, 2014	Added information about the two user interfaces; no other content changes
January 23, 2014	Cover and copyright changes; no other content changes
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 2012	Changed copyright; no content change
May 20, 2011	Updated screenshots to reflect new interface Added information about the Travel Request feature
December 31, 2010	Updated the copyright and made rebranding changes; no content changes
May 14, 2010	New Shared Setup Guide
December 2009	Changed to stand-alone user guide; no content change
May 2009	New document

Imaging Settings

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.

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

This guide describes the steps in the configuration process that involve the company ID and public key.

For information about the *remaining* configuration steps (creating a receipt imaging configuration and assigning the configuration to a policy) as well as information about how the imaging service works, the user experience, and troubleshooting, refer to:

- *Expense: Receipt Handling – Digital Receipts Setup Guide*
- *Invoice: Image Handling – Uploaded and Emailed Images Setup Guide*
- *Authorization Request: Imaging Setup Guide*

Before You Begin

Adobe

Every client computer that employs the imaging service must have the correct version of Adobe Reader installed. Concur recommends version 8.0 or greater. Concur does not provide Adobe Reader as part of Imaging.

> **NOTE:** The first time an employee clicks **Submit** or attempts to view or print an image from within Expense/Invoice/Request and if Imaging is being used, the system checks for the availability of Adobe Reader on the employee's computer. To assist the employee with the application installation, the Concur administrator can provide a link when configuring Imaging that will direct the employee to the Adobe Web site to install the application, or to any other URL that is designated as the access point for Adobe Reader.

Scan

Imaging configurations can be used in conjunction with scan configurations. For Expense, configuration is performed in the *current* Expense interface using Expense Admin; for Invoice, these tasks are performed in the classic Vendor Payment interface using Payment Configuration administrator tool.

Section 3: Using the Imaging Settings

Administrators can enter or update their imaging settings on the **Imaging Settings** page - this name is identical across the Expense, Invoice, and Request.

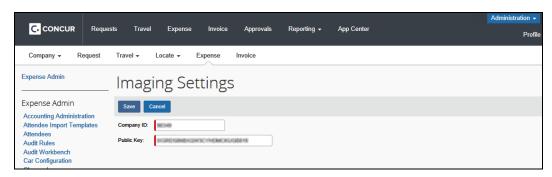Follow these steps to configure Imaging:

1. Contact your Concur Client Support to purchase the service or verify that it is included in your standard subscription service.

2. Provide the unique company ID and public key by using the **Imaging Settings** page in Expense Admin, Invoice Admin, or Request Admin.

3. Create a receipt imaging or invoice imaging configuration and assign it to a policy as described in:
   - *Expense: Receipt Handling – Digital Receipts Setup Guide*
   - *Invoice: Image Handling – Uploaded and Emailed Images Setup Guide*
   - *Authorization Request: Imaging Setup Guide*

Use the Imaging Settings page

▶ *To access Imaging Settings:*

1. Click **Administration** > **Expense** (or **Invoice** or **Request** – on the sub-menu).

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

2. Click **Imaging Settings** (left menu). The **Imaging Settings** page appears.

▶ *To update the Imaging Settings:*

1. On the **Imaging Settings** page, enter or update the desired fields.

Setting	Description
Company ID (Text box)	An identification number provided by Concur This field is case sensitive.
Public Key (Text box)	An identification number provided by Concur This field is case sensitive.

2. Click **Save**.

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