

Concur Invoice: Image Handling – Process Images

User Guide

Last Revised: April 13, 2019

Applies to these SAP Concur solutions:

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

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Revision History

Date	Notes/Comments/Changes
October 31, 2022	Minor edits; cover date not updated
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
March 4, 2021	Updated the copyright year; no other changes; cover date not updated
April 20, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 7, 2020	Updated the copyright; no other changes; cover date not updated
April 13, 2019	Updated images and changed the term "request" to "invoice" where applicable as part of the new user experience for Concur Invoice.
March 5, 2019	Changed the term "Concur" to "SAP Concur" and the term "payment request" to "invoice" where applicable; no other content changes.
February 1, 2019	Updated the copyright; no other changes; cover date not updated
April 11, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 25, 2018	Updated the copyright; no other changes; cover date not updated
December 13, 2016	Changed copyright and cover; no other content changes.
December 5, 2016	Updated the <i>Permissions</i> section and guide content to new corporate style; no content changes.
June 12, 2015	Updated with information about enhanced Process button behavior.
March 13, 2015	New document.

Image Handling – Process Images

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 SAP Concur administrator.

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

Section 2: Overview

The Process Invoice Documents tool allows any employee assigned the Invoice Image Processor role to mark paper images as received for an invoice, and to upload and view additional images to be associated with an invoice.

Associate Images with an Invoice

The system acknowledges the paper images as received for invoices by changing the **Image Received** setting (a flag in the database) from *No* to *Yes* for the invoice. The change occurs when:

- Employees enter the invoice ID from the printed image into the system either manually or by using a scanner to populate the **Invoice ID** field on the **Image Received** page by scanning the barcode on the invoice.
- Employees view images by using options on the **Attach Images & View** page.

Once the employee enters the value, the system updates the information appropriately, based on the policy of the invoice and the scan configuration.

Upload Images for an Invoice

The Process Invoice Documents tool allows the user to use options on the **Attach Images & View** page to attach additional images to an invoice. When doing this, the **Image Upload** window appears with instructions detailing how to upload one or more images for the invoice. The tool also allows the user with the Image Processor

role to view images currently associated with the invoice by entering the invoice ID. The image processor may also set the image as received to speed up the processing of the invoice.

The configurable capabilities within Invoice Image Processor include:

- Inserting data that can be used for record management (Invoice Container ID)
 - Conditional invoice image processor alerts to signal the need for special processing
-  For more information about scan configurations or policies, refer to the *Concur Invoice: Image Handling – Scan Configuration Setup Guide* and *Concur Invoice: Policies Setup Guide*, or contact your Concur Invoice administrator.

Available Actions

Any employee granted the Invoice Image Processor role may perform the following actions:

- Update the image received information in the system by typing or scanning the invoice ID and by providing a unique invoice container ID
- Upload one or more additional images to append to the images currently associated with an invoice
- View all images associated with an invoice
- Set images as received for faster processing of an invoice

Section 3: Required Roles

The Employee administrator must assign the Invoice Image Processor role to the employee. Any employee assigned this role can scan invoices for anyone within the company; there are no group restrictions.

The administrator must grant the Invoice Image Processor role to an employee before they can access the Process Invoice Documents tool. The Employee administrator grants this assignment in User Permissions.

The screenshot shows the Concur User Permissions interface. The top navigation bar includes 'Administration' and 'Help'. A dropdown menu for 'Company Admin' is open, showing options like 'Company', 'Request', 'Expense', and 'Invoice'. The main area has tabs for 'Travel', 'Expense', 'Request', 'Invoice' (which is circled in red), 'Reporting', and 'Supplier'. On the left, a sidebar lists 'Company Admin Home', 'Company Admin' (with sub-options like Approval Queues, Billing Administrator, Company Locations, Org Unit Admin, Report Admin, Text Customization, Security Keys, Password Administrator, Manage Custom Fields, Directory Server Admin, Company Settings, Share Custom Fields, Login URL Manager), 'User Administration' (with sub-options like User Administration, Add User, Self-Registration Setup, Self-Registration Approval, Send Mobile Instructions, User Permissions, and Company Groups), and 'Localization Tool', 'Tools', 'Budget Admin', 'Web Services', 'Report Admin'. The central workspace has sections for 'Step 1. Modify Roles By:' (set to 'Role'), 'Step 2. Role to Assign to Users:' (listing various roles including 'Invoice Approver', 'Invoice Configuration Administrator', 'Invoice Configuration Administrator (Restricted)', 'Invoice Image Processor' (which is circled in red), 'Invoice Payment Manager', 'Invoice Processor', 'Invoice Processor (Audit)', 'Invoice Processor Manager', 'Invoice Proxy Logon', 'Invoice Purchasing User', 'Invoice Receipt Processor', 'Invoice Tax Administrator', 'Invoice User', 'Invoice Vendor Manager', 'Password Manager', and 'Printers - Order Printers'), 'Step 3. Search Text:', 'Search What: Name, Email, Log-in', 'Search' button, and 'Show Users in Only This Employee Group Configuration: All Users I Can Access'. Below the list of roles are buttons for 'Add >', 'Modify >', and '<< Remove'. A 'Users with this Role' section is also visible.



For more information about adding, editing, or deleting user roles within the User Permissions tool, refer to the *Shared: User Administration User Guide* or contact your Invoice administrator.

Section 4: Managing Invoice Images

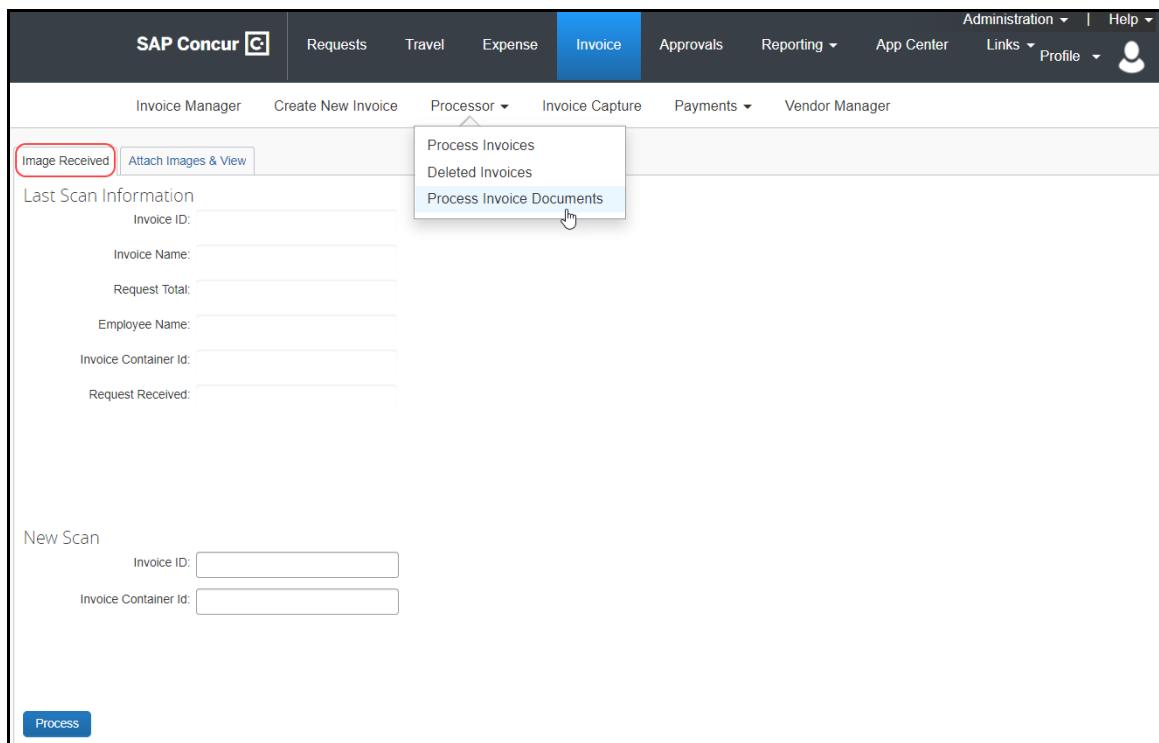
The Employee administrator may assign the Invoice Image Processor role to multiple employees and can thus assign each invoice image processor to enter and update image information for invoices for all employees within the company.

Access the Process Images Tool

To access the Process Invoice Documents tool, click **Invoice > Processor > Process Invoice Documents**.

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

The **Image Received** page appears.



The screenshot shows the SAP Concur interface for managing invoice images. At the top, there's a navigation bar with links for Requests, Travel, Expense, **Invoice** (which is highlighted in blue), Approvals, Reporting, App Center, Links, Profile, and Help. Below the navigation bar, there's a sub-menu for the **Processor** role with options like Process Invoices, Deleted Invoices, and Process Invoice Documents. The main area is titled "Image Received" and contains fields for Last Scan Information (Invoice ID, Invoice Name, Request Total, Employee Name, Invoice Container Id, Request Received) and New Scan (Invoice ID, Invoice Container Id). A "Process" button is at the bottom.

Scan an Invoice Image

You can provide the Invoice ID information by using either a barcode scanner to populate the **Invoice ID** field on the **Image Received** page, or by manually entering the Invoice ID code displayed on the invoice image into the field. After you have entered the data, the system updates the invoice information appropriately, based on the policy of the invoice and the scan configuration.

NOTE: Depending on your configuration, you may not display the invoice ID on the invoice. Contact your Concur Invoice administrator to have the invoice ID added to the printed invoice.

! IMPORTANT: The barcode that appears on the invoice incorporates a large, wide font for a scanner to read it properly. You should verify that your barcode scanner works with the SAP Concur barcode specifications.

► **To scan an invoice:**

1. Click the **Image Received** tab.
2. Scan the barcode at the top of the invoice into the **Invoice ID** field. This is a required field.



3. Enter the invoice container ID information into the **Invoice Container ID** field. This field may or may not be required by the scan configuration.

Section 4: Managing Invoice Images

NOTE: You may use the Image Container ID for data management and tracking purposes. For example, if you use a numbered filing system, you will type the numerical value of the file or storage box that contained the images in this field.

The screenshot shows a user interface for managing invoice images. At the top, there are two buttons: 'Image Received' and 'Attach Images & View'. Below these are sections for 'Last Scan Information' and 'New Scan'. The 'Last Scan Information' section contains fields for Invoice ID, Invoice Name, Request Total, Employee Name, Invoice Container Id, and Request Received. The 'New Scan' section contains fields for Invoice ID (containing '6011604D07C8496EB221') and Invoice Container Id (containing '1.4..3'). A red oval highlights the 'Invoice Container Id' field in the 'New Scan' section. At the bottom is a blue 'Process' button.

- Click **Process**. The system's Image Received flag for that invoice changes to reflect the new information. In addition, the system updates the **Last Scan Information** section to reflect the invoice that was most recently processed.

NOTE: When you click the **Process** button, this action will also include the behavior of the **Set Request Received** button on the **Attach Images & View** page.

The screenshot shows the same user interface as the previous one, but with a red oval circling the 'Last Scan Information' section. The 'Last Scan Information' section now displays the processed invoice details: Invoice ID ('6011604D07C8496EB221'), Invoice Name ('title #4'), Request Total ('176.00 USD'), Employee Name ('Administrator, Concur'), and Invoice Container Id (''). The 'New Scan' section remains the same, with the 'Invoice Container Id' field containing '1.4..3'. The 'Process' button is at the bottom.

- Place the images into the designated image container, if applicable.

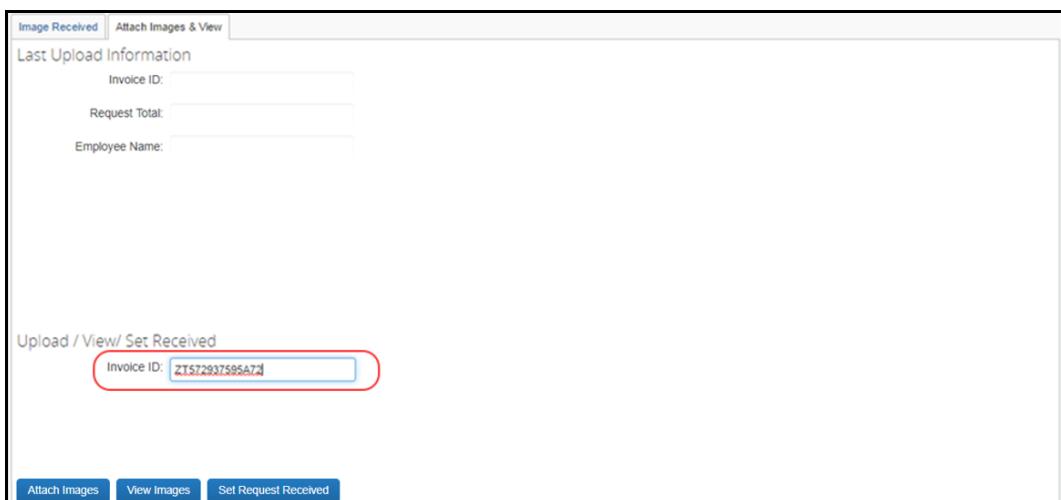
Upload and Attach Images to an Invoice

The image processor may use the Process Invoice Documents tool to upload images to associate them with an existing invoice. This procedure does *not* turn the Image Received flag in the system to Yes. To change the flag immediately, the image processor must view the images on the **Attach Images & View** page or enter the invoice ID on the **Images Received** page. If the image processor does not view the images, then the system will update the flag when the imaging job next executes.

► **To attach images to an invoice:**

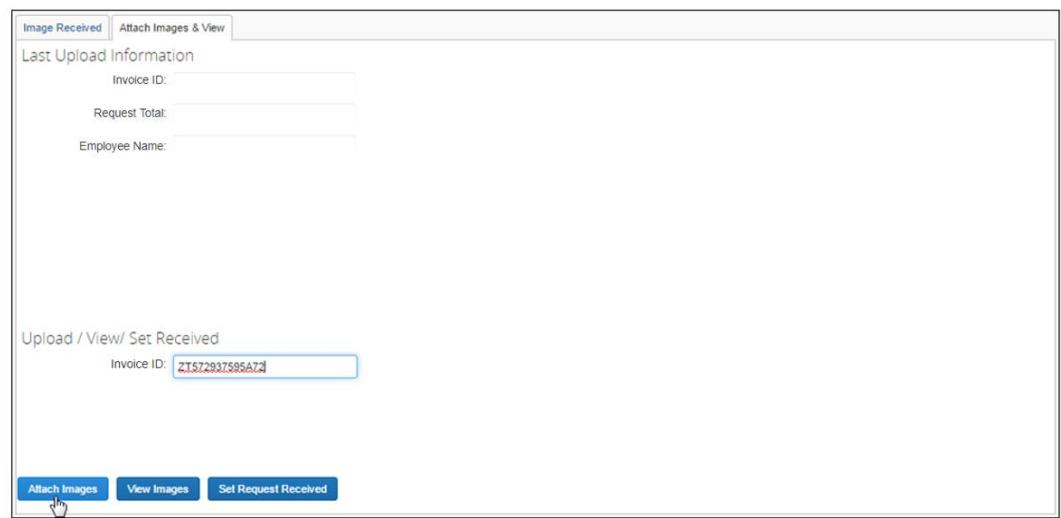
1. Click the **Attach Images & View** tab.
2. Enter the invoice identifier found on the invoice into the **Invoice ID** field.

NOTE: If your company uses a handheld scanner to track images, you can use that scanner to populate the **Invoice ID** field.



The screenshot shows a user interface for managing invoice images. At the top, there are two tabs: "Image Received" (which is selected) and "Attach Images & View". Below the tabs, the "Last Upload Information" section displays fields for "Invoice ID", "Request Total", and "Employee Name". Underneath this, the "Upload / View/ Set Received" section contains an "Invoice ID" input field containing the value "Z1572937595A72", which is circled in red. At the bottom of the screen are three buttons: "Attach Images", "View Images", and "Set Request Received".

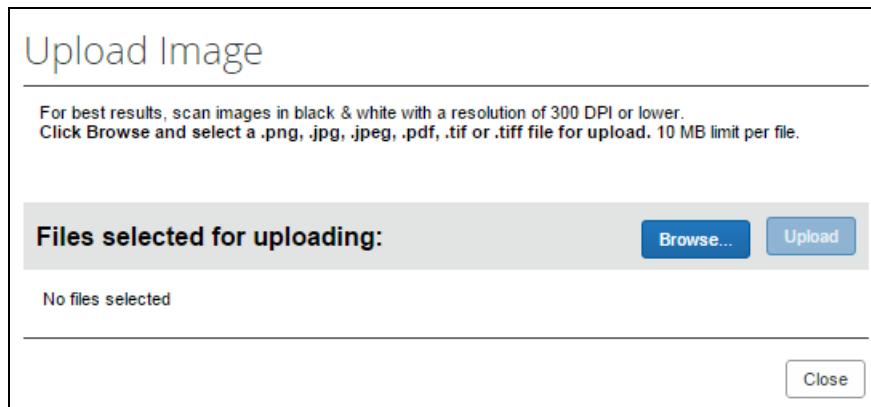
3. Click **Attach Images**.



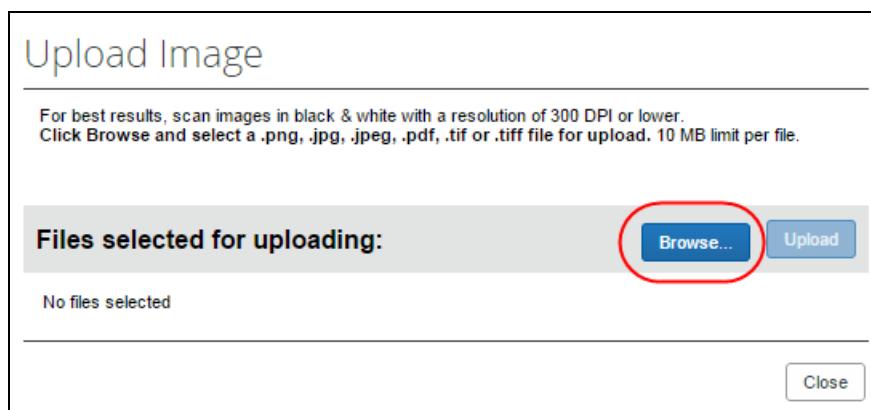
This screenshot is identical to the one above, showing the "Attach Images & View" tab. The "Last Upload Information" and "Upload / View/ Set Received" sections are visible, with the "Invoice ID" field still containing "Z1572937595A72" and highlighted by a red oval. The "Attach Images", "View Images", and "Set Request Received" buttons are at the bottom, and a cursor arrow is pointing specifically at the "Attach Images" button.

Section 4: Managing Invoice Images

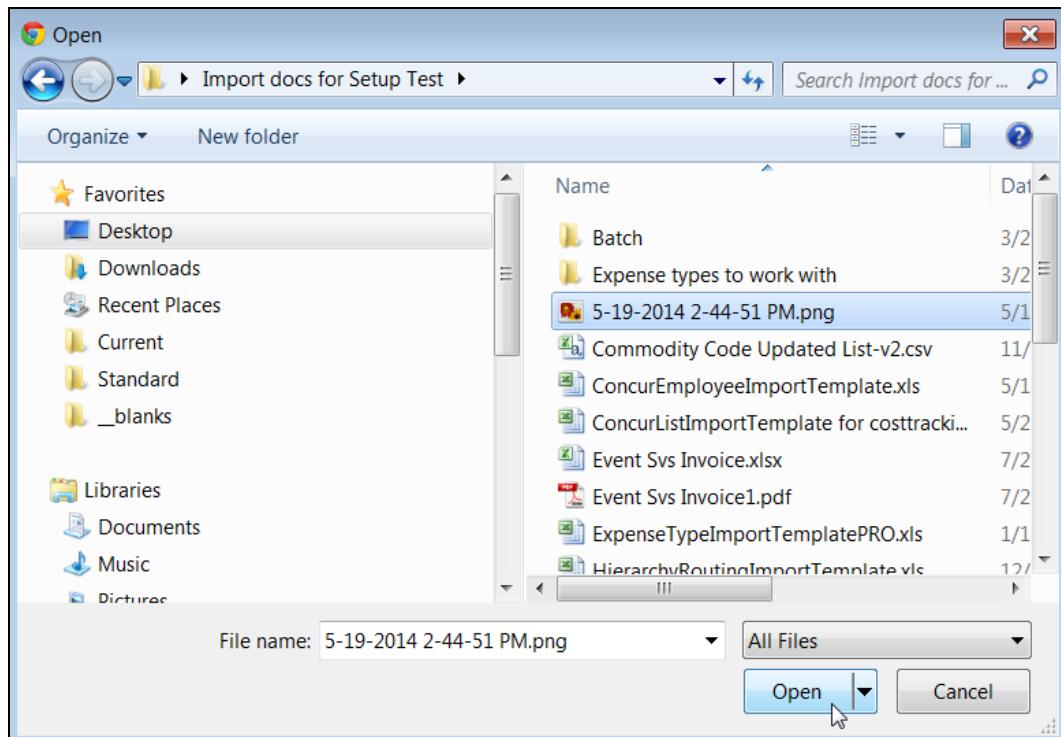
The **Upload Image** window appears.



4. Click **Browse**.



5. Navigate to the image, and then click **Open**.



6. Click **Upload**.

A screenshot of an 'Upload Image' interface. The title is 'Upload Image'. Below it, instructions say: 'For best results, scan images in black & white with a resolution of 300 DPI or lower. Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 10 MB limit per file.' A list area shows 'Files selected for uploading' with one item: '5-19-2014 2-44-51 PM.png'. To the right are buttons for 'Browse...', 'Upload' (with a cursor over it), 'Remove', and 'Close'.

7. (Optional) Repeat steps 3 - 6 until you have uploaded all images.

8. Click **Close**.

View Images for an Invoice

The image processor may view the images of the invoices associated with an invoice by using options on the **Attach Images & View** page. The act of viewing an invoice image will update the Image Received flag to Yes.

► **To view images associated with an invoice:**

1. Click the **Attach Images & View** tab.
2. On the **Attach Images & View** page, enter the invoice identifier found on the invoice into the **Invoice ID** field.

This screenshot shows the 'Attach Images & View' page. At the top, there are two tabs: 'Image Received' (which is selected) and 'Attach Images & View'. Below the tabs is a section titled 'Last Upload Information' containing fields for 'Invoice ID', 'Request Total', and 'Employee Name'. Underneath this is a section titled 'Upload / View/ Set Received' with a sub-section for 'Invoice ID' which contains the value 'ZD4058385039F5472'. At the bottom of the page are three buttons: 'Attach Images', 'View Images', and 'Set Request Received'. The 'View Images' button has a red circle drawn around it, indicating it is the next step.

3. Click **View Images**.

This screenshot shows the same 'Attach Images & View' page as the previous one, but with a mouse cursor hovering over the 'View Images' button at the bottom. The 'View Images' button is highlighted with a red circle, indicating it is the current action being performed.

A viewer opens that allows you to scroll through all the images associated with the invoice.

The screenshot shows a software application window with a title bar. Below the title bar is a toolbar with several icons. The main area contains a form for an invoice. At the top center, it says "COMPANY NAME" and "INVOICE". Below this, there are two sections: "BILL TO" and "SHIP TO". Under "BILL TO", the address is listed as "Sam Smith, 123 Main Street, Seattle, WA 98002". Under "SHIP TO", fields include "Name", "Street Address", "Address 2", "City, ST ZIP Code", "Invoice #2345", "Invoice Date 05/19/2014", and "Customer ID". Below these sections is a table with columns: DATE, YOUR ORDER #, OUR ORDER #, SALES REP., F.O.B., SHIP VIA, and TERMS. The next section is a table with columns: QTY, ITEM, UNITS, DESCRIPTION, DISCOUNT %, TAXABLE, and UNIT PRICE. One row is visible with "1" in QTY, "Pens" in DESCRIPTION, and "100.00" in UNIT PRICE. There are navigation arrows at the bottom of this table.

You will also see the image you last uploaded in the **Last Upload Information** section.

This screenshot shows the "Last Upload Information" section. It includes a "Image Received" button and a "Attach Images & View" link. Below this, the section title "Last Upload Information" is displayed. Underneath, the "Invoice ID" is shown as "6011604D07C8496EB221". The "Request Total" is listed as "\$176.00". The "Employee Name" is "Administrator, Concur".

Set Images Received

The image processor may set an image as received to speed up the process in which an invoice goes through the system. This might be useful, for example, if no image is available and the processor needs to process an invoice quickly for a vendor waiting for payment. When the image processor clicks the **Set Image Received** button, the system updates a flag in the database that the image is available, although it is not, and sidesteps the process for faster processing of the invoice.

► **To set images received:**

1. Click the **Attach Images & View** tab.
2. On the **Attach Images & View** page, enter the invoice ID from the invoice in the **Invoice ID** field.

This screenshot shows the 'Attach Images & View' page. At the top, there are two tabs: 'Image Received' (which is selected) and 'Attach Images & View'. Below the tabs, there is a section titled 'Last Upload Information' with fields for 'Invoice ID', 'Request Total', and 'Employee Name'. Underneath this, there is a section titled 'Upload / View/ Set Received' with a field for 'Invoice ID' containing the value 'ZD4058365039F5472'. At the bottom of the page are three buttons: 'Attach Images', 'View Images', and 'Set Request Received', with the 'Set Request Received' button being highlighted by a red oval.

3. Click **Set Request Received**.

This screenshot shows the same 'Attach Images & View' page as the previous one, but the 'Set Request Received' button has been clicked. The 'Invoice ID' field now contains the value 'ZD4987393F5472'. The 'Set Request Received' button is still highlighted by a red oval at the bottom of the page.

A window appears to inform you that the system has marked the invoice with an image received.



4. Click **OK**.

