

# **Concur Invoice: Routing Configuration**

## **User Guide**

**Last Revised: September 20, 2013**

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
March 14, 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.
April 10, 2015	Updated the images to the enhanced UI and made general updates to the content.
September 18, 2014	Added information about the two user interfaces; no other content changes.
April 15, 2014	Change copyright and cover; no other content changes.
September 20, 2013	Removal of the <b>Vendor Mapping List</b> page and options – you may now find this material in the <i>Invoice: Vendor Manager User Guide</i> .
March 22, 2013	Added note that vendor assignment to invoice owner does not have precedence over assignment via Intelligent Capture at batch or invoice level.
December 28, 2012	Made rebranding and/or copyright changes; no content changes.
May 18, 2012	Addition of the <b>Vendor Mapping List</b> tab that allows the association of a default Invoice Owner to one or more vendors.
February 17, 2012	New User Guide.

# Routing Configuration

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**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 Routing Configuration feature is used to direct Concur Invoice to automatically select an Invoice Owner when the AP User chooses a value from a simple list field or from a group of connected list fields that have been added to the Request header form for this purpose. This allows systematic mapping of the preferred Invoice Owner to invoices as part of a site's overall invoice assignment strategy, preventing mistaken assignments and speeding the overall process for the AP User. That is, by importing this association of employee to a specific hierarchy mapping, the AP User can be sure a systematic relation of segments (Company > Sales > North) will always result in choosing the correct Invoice Owner.

### Example

As an example, assume a company (Company) with multiple Sales locations (North, South, etc.) decides that every invoice created for the North Sales division should route to Ken. The administrator configures the system so that, when the AP User selects Sales > North, the system defaults the assignment to Ken. If Ken is unavailable (moves on; is promoted) the system will "walk" up the connected list hierarchy to the next assigned user at the Sales level, and so on.

**TIP:** By designating a default, Global Group employee under the hierarchy, that employee will always be available to assign the invoice to.

## The Routing Configuration Screens

Routing Configuration is divided into two areas, the import function used to import the hierarchical data, and the view function that provides search options and displays the imported hierarchical mappings.

- **Hierarchy Mapping List:** The options on this page let the user search for specific hierarchy mappings and display them in rows sorted alphabetically.
  -  All information about the **Hierarchy Mapping List** page is included in this user guide.
- **Import Hierarchy Mappings:** The options on this page let the user download the import template and upload the data into Concur Invoice
  -  For more information about importing the hierarchy mapping data, refer to *Concur Invoice: Hierarchy Mappings Import User Guide*.

## Required Roles

The AP User role is required to assign the invoices, and the configuration of the feature requires the Invoice Administrator (Restricted) role.

-  For more information on assigning roles, refer to *Shared: User Administration User Guide*.

## Section 3: Create the Invoice Routing Feature Hierarchy

A source list is required to map the hierarchy path segments for use. The user first specifies the source list and relevant segments using the Invoice Routing hierarchy in the Feature Hierarchies area. In the example below, the source list "sample" is selected, and three invoice header fields (Custom 10, 11, and 12) have been designated as segments to make up the full hierarchy path.

Level	Segment Name	Order
Request	Custom 10	↓
Request	Custom 11	↓ ↑
Request	Custom 12	↑

In use, the Custom fields will become the hierarchy so that, when a value is selected in the first field, the next field shows only those values the first field supports (Sales > North). The third field offers the name of the user auto-assigned to this invoice.

## Populate the Routing Configuration Page by Using the Hierarchy Import

Mappings appear in the Routing Configuration page after importing the data using options on the **Import Hierarchy Mappings** page. These options allow the user to download an Excel spreadsheet, populate it with data, then upload and import the hierarchies into Concur Invoice.

Importing a vendor is a multi-step process. The user:

**Step 1:** Downloads the Hierarchies Routing template to their local computer

**Step 2:** Populates the template with hierarchy mappings

**Step 3:** Uploads and imports the template and its data

**Step 4:** Views the import details



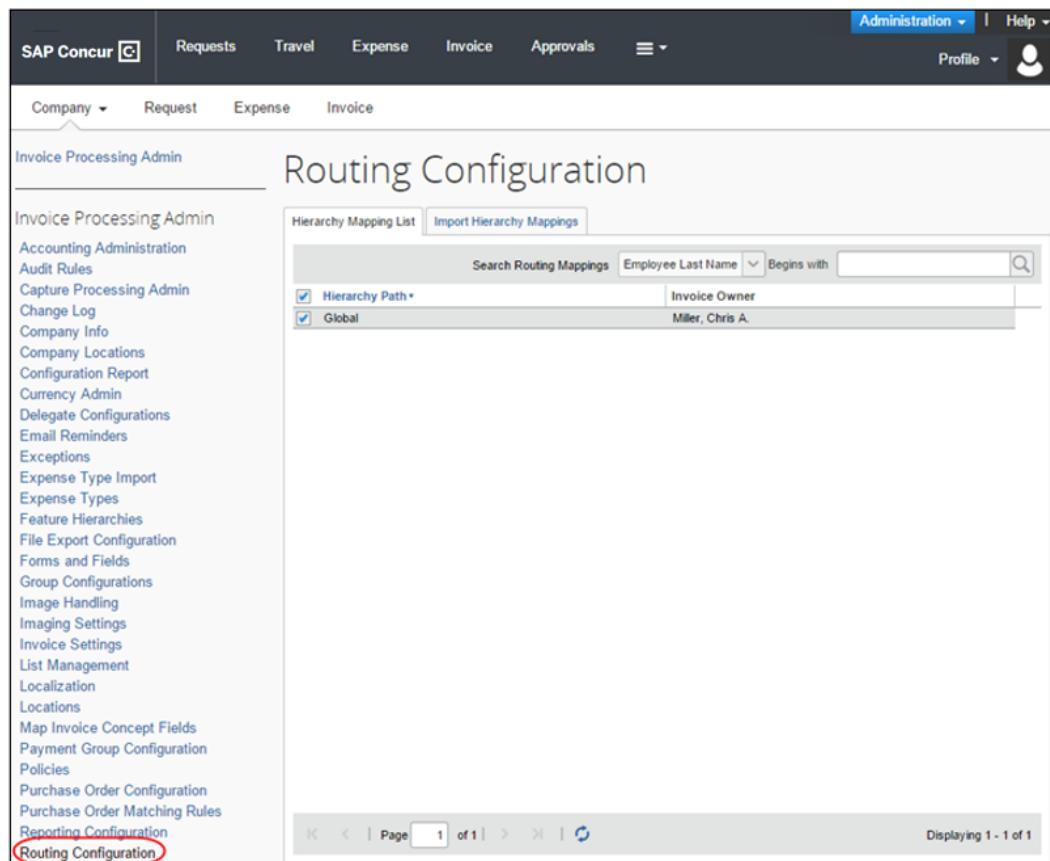
For more information about importing the hierarchy mapping data, refer to *Concur Invoice: Hierarchy Mappings Import User Guide*.

## Access the Routing Configuration Page

The Invoice Configuration administrator accesses the **Routing Configuration** page in Concur Invoice.

► **To access the Routing Configuration page:**

1. Click **Administration > Invoice**.
2. Click **Routing Configuration**.



The screenshot shows the SAP Concur interface. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Administration, Help, Profile, and a user icon. Below the navigation is a secondary header with Company, Request, Expense, and Invoice tabs. The main content area is titled "Routing Configuration". On the left is a sidebar with a long list of administrative options, including Accounting Administration, Audit Rules, Capture Processing Admin, Change Log, Company Info, Company Locations, Configuration Report, Currency Admin, Delegate Configurations, Email Reminders, Exceptions, Expense Type Import, Expense Types, Feature Hierarchies, File Export Configuration, Forms and Fields, Group Configurations, Image Handling, Imaging Settings, Invoice Settings, List Management, Localization, Locations, Map Invoice Concept Fields, Payment Group Configuration, Policies, Purchase Order Configuration, Purchase Order Matching Rules, Reporting Configuration, and Routing Configuration. The "Routing Configuration" link is highlighted with a red circle. To the right of the sidebar is a "Hierarchy Mapping List" section with a search bar for "Employee Last Name" and a table showing one result: "Hierarchy Path" (checked) and "Global" (checked), both mapped to "Invoice Owner" with the value "Miller, Chris A.". At the bottom of the list area are navigation buttons for pages and a note "Displaying 1 - 1 of 1".

3. The **Hierarchy Mapping List** page appears with a list of hierarchy mappings imported for display.

## Search for Hierarchy Mappings

The administrator can search for hierarchy mappings by employee name or by any of the first three levels of the mapping segments.

► **To search for hierarchy mappings:**

1. On the **Hierarchy Mapping List** page, input the search criteria into the Search Routing Mappings search box as follows:
  - ◆ **Employee Last Name:** Type the last name of the employee who is associated with the hierarchy mapping that you want to display. For example, if Ken Brown is associated with the mapping, type "Brown" in **Begins With**.
  - ◆ **Segment 1 - 3:** You can elect to search for the mapping by typing in any of the first three segments mappings. For example, if the mapping is Company > Sales > North, and you only remember North, select the correct sequence (Segment 3 in this example) and type North in **Begins With**.
2. Click the magnifying glass ( ) icon to begin the search.
3. The search results appear in rows that can be sorted by the **Hierarchy Path** column (click the up/down arrow to toggle the display).

Hierarchy Path		Invoice Owner
<input type="checkbox"/>	Miller	Chris A.

4. Clear the result set by clicking the x ( ) icon. This resets the display to show all hierarchy mappings currently imported into the system.

