Shared: Feature Hierarchies

Setup Guide

Last Revised: February 28, 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

☒ Request
  ☒ Professional/Premium edition
  ☐ Standard edition

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Revision History

Date	Notes/Comments/Changes
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
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October 19, 2012	Added information about the Travel Request Cost Object Approver hierarchy
September 14, 2012	Added information about the Invoice Vendor Employee Access hierarchy

Date	Notes/Comments/Changes
January 20, 2012	Added information about the Invoice Routing hierarchy
August 12, 2011	Added information about the Request Authorized Approver hierarchy (for travel requests)
February 25, 2011	Original document *Shared: Feature Hierarchies and Group Configurations* is divided into this document and *Shared: Group Configuration for Employees Setup Guide*.
December 31, 2010	Updated the copyright and made rebranding changes; no content changes

Feature Hierarchies

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. In this case, the client must initiate a service request with SAP Concur support.

Section 2: Overview

Certain features have a hierarchy definition (similar to an organizational chart) and an associated data list (provides the data for the different levels of the organizational chart). Based on these hierarchies, the administrator can define the Group Configurations.

The administrator uses the Feature Hierarchies tool to define, edit, and reorder hierarchy levels.

Feature Hierarchy

A *feature hierarchy* controls an area of functionality within Expense, Invoice, Request, and Analysis/Intelligence. Some features have an associated hierarchy, which determines the structure that defines a group of employees. For example, the Employee hierarchy controls the set of employee groups and dictates the employee form that will be used by each of those groups – among other things.

The Feature Hierarchies tool is accessed from Expense Admin, Invoice Admin, or Request Admin and provides a central page to configure all the hierarchies.

The features that have associated hierarchies are listed below and defined on the following pages.

For employees:

- Employee

For Expense:

- Expense Reports
- Expense Authorized Approver
- Expense Cost Object Approver
- Tax
- Travel Allowance

For Invoice Processing:

- Vendor Payments
- Payment Authorized Approver
- Payment Cost Object Approver
- Invoice Payment (for Invoice Pay)
- Invoice Vendor Employee Access

For Analysis/Intelligence:

- Reporting

For Request:

- Request Authorized Approver
- Request Cost Object Approver

Source List

A source list provides the data that appears in the valid groups that can be used with the feature hierarchy.

NOT Feature Hierarchies

Connected Lists and Account Codes are a form of hierarchy but are ***not*** configured in the Feature Hierarchies tool. For more information, refer to:

Connected Lists Information	Account Codes Information
Expense: Forms and Fields Setup Guide	*Expense: Ledgers Setup Guide*
Invoice: Fields Setup Guide	*Expense: Account Codes Setup Guide*
Authorization Request: Forms and Fields Setup Guide	*Invoice: Ledgers Setup Guide*
	Invoice: Account Codes Setup Guide

Section 3: Types of Feature Hierarchies

Employee

The Employee hierarchy is used to set up groups used to administer employee-specific data. The fields selected as levels of the hierarchy must be included on the employee form. (The fields can be hidden if necessary, but they must be included on the form.) Employee groups are used to determine the forms that are available to each employee. These forms are found in User Administration and Profile.

The Employee hierarchy is also used to designate the appropriate hierarchical groups used in other features that are configured by the Expense/Invoice/Request Admin, such as Delegates.

Expense

The hierarchies used in Expense are:

- **Expense Reports:** The Expense Reports hierarchy is used to set up groups to be used in Expense. Expense groups are used to determine the Expense policies and configuration data that an employee can access. This feature is also used in User Permissions to assign group-based roles. For example, you can assign Password Managers based on a specific group of employees.
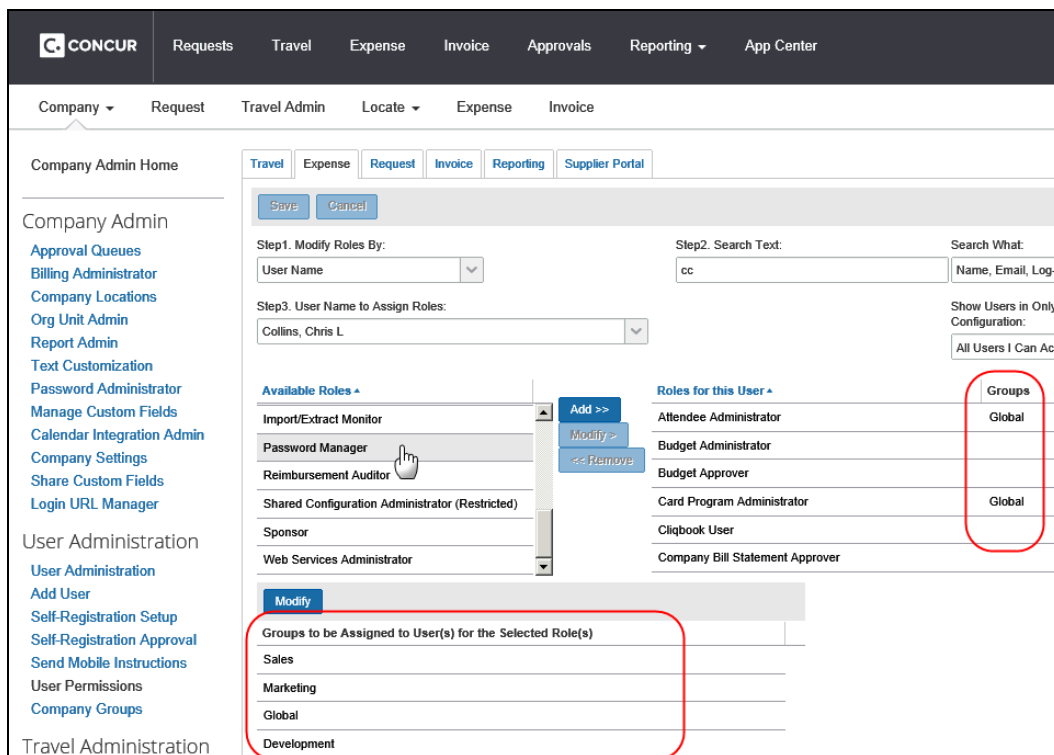
- **Expense Authorized Approver:** The Authorized Approver feature is available in Expense, Invoice, and Request - each has a separate hierarchy.

  📖   For more information on authorized approvers, refer to *Expense: Workflow - Authorized Approvers Setup Guide*.

- **Expense Cost Object Approver:** Cost object approvers are available in Expense, Invoice, and Request - each has a separate hierarchy.

  📖   For more information about cost object approvals, refer to *Expense: Workflow – Cost Object Approval Setup Guide*.

- **Tax:** The Tax hierarchy determines the tax configuration that is used for an employee based on a combination of the user's country and position in the hierarchy. A company can have different configurations for its employees in different parts of the organization, such as in different countries, departments, or divisions.

NOTE: Tax and Travel Allowance hierarchies operate differently than the rest of the hierarchies; they do not use a source list to map to users to these feature hierarchies.

The Tax hierarchy may include any fields available from the Employee fields list.

📖   For more information, refer to the *Expense: Value Added Tax (VAT) / Tax Administration Setup Guide*.

- **Travel Allowance:** The Travel Allowance hierarchy determines the travel allowance configuration that is used for an employee based on a combination of the user's country and the user's position in the hierarchy. For example, if an employee has a country as Germany and is a member of the R&D Division>Development department, then the travel allowance configuration corresponding to that combination is selected by the system.

> **NOTE:** Tax and Travel Allowance hierarchies operate differently than the rest of the hierarchies; they do not use a source list to map to users to these feature hierarchies.

The Travel Allowance hierarchy can include any fields available from the Employee fields list.

    For more information, refer to the *Expense: Travel Allowance Setup Guide*.

Invoice Processing

The hierarchies used in Invoice Processing are:

- **Invoice Payment:** This hierarchy is used for the Invoice Pay feature.

      For more information about Invoice Pay, refer to *Invoice: Invoice Pay Setup Guide*.

- **Invoice Routing:** This hierarchy is used to automatically route an invoice to the Invoice Owner.

- **Vendor Payments:** The Vendor Payment hierarchy is used to set up groups used within Invoice Processing. Payment groups are used to determine the Invoice policies and configuration data that an employee can access. It is also used in User Permissions to assign group-based roles related to Invoice.

- **Payment Authorized Approver:** The Authorized Approver feature is available in Expense, Invoice, and Request - each has a separate hierarchy.

      For more information on authorized approvers, refer to *Invoice: Workflows - General Information Setup Guide*.

- **Payment Cost Object Approver:** Cost object approvers are available in Expense, Invoice, and Request - each has a separate hierarchy.

      For more information about cost object approvals, refer to *Invoice: Workflow – Cost Object Approval Setup Guide*.

- **Invoice Vendor Employee Access:** The vendor group you create here is assigned vendors, then mapped to a user who can then choose from only those vendors when creating their invoice.

      For more information about creating vendor groups for assignment to users, refer to *Invoice: Vendor Employee Access User Guide*.

Analysis/Intelligence

The hierarchy used in Analysis/Intelligence is:

- **Reporting:** The Reporting feature is used to determine the data available in the reports that various administrators and employees can create, view, or delete starting from their assigned level in the reporting group hierarchy down.

   📖   For more information about the Reporting hierarchy, refer to the *Analysis/Intelligence: Overview User Guide*.

Request

The hierarchies used in Request are:

- **Request Authorized Approver:** The Authorized Approver feature is available in Expense, Invoice, and Request - each has a separate hierarchy.

   📖   For more information on authorized approvers, refer to *Authorization Request: Workflow - Authorized Approval Setup Guide*.

- **Request Cost Object Approver:** Cost object approvers are available in Expense, Invoice, and Request - each has a separate hierarchy.

   📖   For more information about cost object approvals, refer to *Authorization Request: Workflow – Cost Object Approval Setup Guide*.

Section 4: Setting Up Feature Hierarchies

Recommended Steps

Correctly setting up a feature hierarchy requires accessing different areas within the Expense Admin, Invoice Admin, and/or Request Admin tool. The recommended order of steps is as follows.

Step 1: Design the Hierarchy and Determine Which Fields Will Be Used

The first step is to define your ideal hierarchy structure on paper (or whiteboard) for each feature – start with Employee, then Expense, then any remaining hierarchies required by the client.

Keep the following in mind:

- Hierarchy levels – once in use – *cannot be removed* so proper design and testing are extremely important. Whenever possible, test and confirm the structure in TEST when the data can still be purged if changes are required.

- There is a temptation to simply use the company's organizational structure as the basis for the Employee or Expense Reports feature hierarchy.
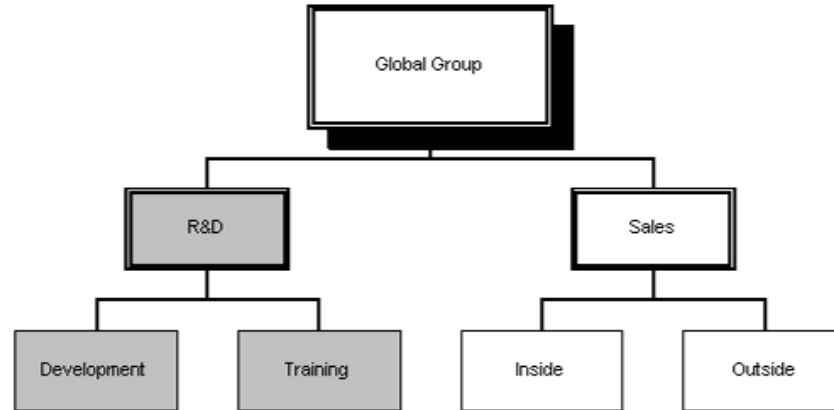
It is a logical structure and the required connected list source data is likely already available in the system. However, in the ***vast majority of cases***, using the "org chart" as the basis of the hierarchy is the ***least*** flexible option especially when trying to ensure the structure is future-proofed, especially in the event of organizational changes.

Be aware that a hierarchy in use ***cannot*** be changed (except to add levels to the bottom) while the actual organizational structure in a company can – ***and probably will*** – change regularly. Fixing this situation will then involve a service request, SAP Concur customizations, a new hierarchy, and likely new data - all of which can quickly become complicated and costly.

! **IMPORTANT:** Best practice is to ***not*** use the "org chart" structure unless you absolutely have to. Using the "org chart" structure is required if (and only if) the company intends to assign group-aware roles based on nodes in their organizational structure. Note that this is very rare.

Best practice is to design a single-level hierarchy with a single-level list – using Custom 21 as described below.

- Using connected (multi-level) lists is not a requirement. You can design a single-level hierarchy or a multi-level hierarchy – using any field type, like connected list, list, text, etc.

  Best practice for the Employee and Expense Reports feature hierarchy is single level. For some of the other hierarchies, you may not have a choice; multi-level with connected lists are required.

  A flat (single-level) list is much easier, is far more flexible, and can be easily changed without costly customizations. Populate a custom field (like Custom 21) with Company Codes, Countries, or Roles – whatever the client uses to identify groups of employees.

  In addition, if you do have multi-level hierarchies, you can combine field types, like connected list fields for the first two levels and a text field for the third.

- You don't have to use the Org Unit fields. Consider using a Custom field, like Custom 21. If you use the Org Unit fields, you may eventually find conflicts with other uses of the fields and source data.

- Understand that using the same fields for multiple purposes like hierarchies may eventually create a design conflict. For example:

  - Need Company (OU1), Cost Center (OU2), and Department (OU3) to drive authorized approver selection

  - Need Company (OU1), Cost Center (OU2), and Project (Cust1), Task (Cust2) to drive allocation connected list

  The result is either redundant sets of connected list data, which means the lists can become out-of-sync, or a long set of connected list data to satisfy both needs: OU1, OU2, OU3, Cust1, and Cust2

- You can use copy down to populate the fields. You can use employee fields or report fields. However, keep the following in mind:

  - Employee fields represent the current state.

  - Report fields represent a point in time, like when the report was saved.

  Employee data may change between the time the report was submitted and when the Authorized Approver hierarchy determines who the appropriate approver is. So, consider: do you want the expense report routed based on the data that was valid when the report was submitted or do you want to use the employee's current data?

- You can use validation rules (usually for authorized approvers) along with a variety of field types. For example:

  - Hierarchy: Company, Cost Center, Workflow Class

  - In this scenario, Company and Cost Center are connected list fields and Workflow Class is a text field, which is updated by a validation rule that evaluates the employee profile to update the Workflow Class field.

Step 2: Create the Hierarchies and Source Lists

When creating the hierarchy (as defined in *Procedures* in this guide), you are asked whether to create a new source list or use an existing one. A source list must exist in order to define a connected list. It doesn't have to contain list items at this point, but it must be created as a placeholder to work with imported company data.

You can create a list in List Management and then either enter list items manually or import list items. List data must be entered or imported before a feature hierarchy becomes active.

! **IMPORTANT:** This list data must be entered or imported before you can import employees, as the data on the employee record is validated against the values in the list.

Step 3: Set up the Ledger

If **Ledger** is used as one of the levels in a feature hierarchy, then you **must** create all ledgers at this point. If you are not using Ledgers as a level, you can do this at any point during the overall system configuration.

📖   For more information about cost object approvals, refer to:

   ♦ *Expense: Ledgers Setup Guide*

   ♦ *Invoice: Ledgers Setup Guide*

Step 4: Enter or Import List Data

List data can be manually entered or imported in List Management.

📖   Refer to the *Shared: List Management Setup Guide* for more information.

Step 5: Create a Connected List Definition

The connected list definition associates the data contained in a source list with a hierarchy type.

The hierarchy definition defines the fields that constitute the levels of the hierarchy and the source list that will be used to provide the list of valid groups. The connected list definition specifies the fields that will be populated using the source list that is associated with the connected list definition. Typically, the hierarchy levels and the connected list definition for a feature use the same levels. The source list populates the fields and – in so doing – determines the employee's group.

It is recommended to use connected lists on the employee form for at least the fields in the Employee hierarchy.

It is optional to have the connected list definition be the same as the hierarchy. A hierarchy can be created, and then a Connected List Definition can be created to populate the fields of the hierarchy. This connected list definition does not need to be the same as the hierarchy, such as, it may have the hierarchy as a subset. A hierarchy does not need to have a connected list definition for it.

📖   For more information, refer to:

♦ *Expense: Forms and Fields Setup Guide*

♦ *Invoice: Fields Setup Guide*

♦ *Authorization Request: Forms and Fields Setup Guide*

Step 6: Define Fields to be Used with the Connected List Definition

After selecting fields within the connected list definition, the fields associated with the connected list can be renamed and must be associated with the connected List definition.

📖   For more information, refer to:

♦ *Expense: Forms and Fields Setup Guide*

♦ *Invoice: Fields Setup Guide*

♦ *Authorization Request: Forms and Fields Setup Guide*

Step 7: Add Fields as List

Any field associated to a feature hierarchy should be added as a list in the forms.

Step 8: Define Forms

Before end users can access fields, they must be associated with Employee, Expense, Invoice, and Request forms.

📖   For more information, refer to:

♦ *Expense: Forms and Fields Setup Guide*

♦ *Invoice: Forms Setup Guide*

♦ *Authorization Request: Forms and Fields Setup Guide*

Step 9: Create or Edit Policies

Create or edit default Expense, Invoice, or Request policies to include the forms you created. Policies define the forms that are used when users create an expense report, invoice, or request.

📖   For more information, refer to:

♦ *Expense: Policies Setup Guide*

   ♦ *Invoice: Policies Setup Guide*

   ♦ *Authorization Request: Policies and Groups Setup Guide*

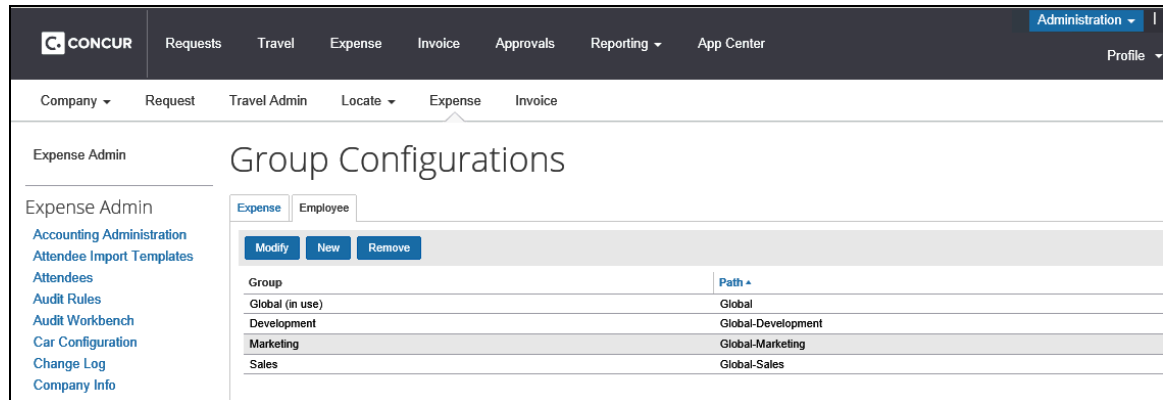### Step 10: Define Group Configurations for Expense and Invoice Processing

Define Group Configurations for Expense and Invoice Processing and assign forms and policy. You only need to define at the highest point in the hierarchy where either the form or the policy is different.

NOTE: Concur Request uses Concur Expense groups.

The **Group Configurations List** page displays columns of all features that are group aware and can have group-specific data. The policies and payment types features must be configured for each group, as must the cash advance workflow, if used. The rest of the columns are optional at this point and can be defined any time during the configuration. However, this page provides a visual of all the areas that can help you determine whether a new group is required.

   📖   For more information, refer to:

   ♦ *Expense: Group Configurations for Expense Setup Guide*

   ♦ *Invoice: Group Configurations Setup Guide*

Employee Import Note

Once you are done setting up features, you can create the employee import definition and run the import. The initial employee import should have a complete employee data set for your company. This will assign the employees to groups via the columns mapped in each feature column levels. This does not have to be done immediately. Other configuration can occur, but it must occur *after* this group configuration. This is done using the Import/Extract Administrator tool.

   📖   For more information regarding imports, refer to *Shared: Employee Import Specification*.

Section 5: Procedures
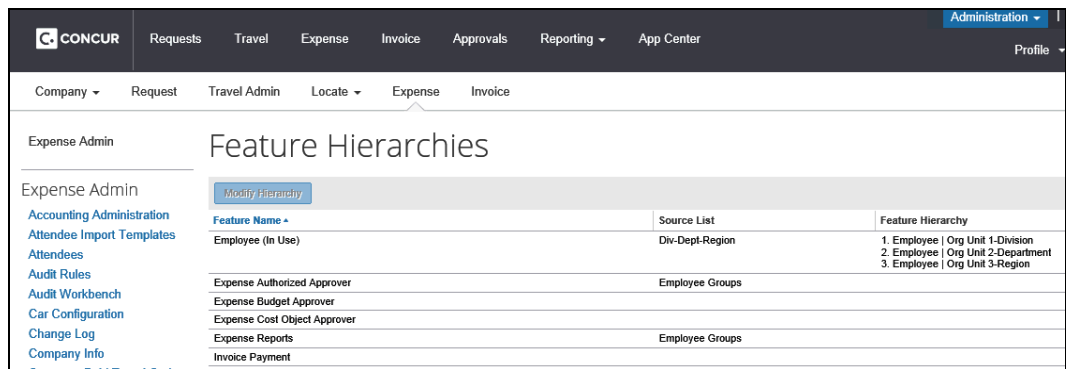
Access Feature Hierarchies

▶ ***To access the tool:***

1. Click **Administration** > **Expense** (or **Invoice** or **Request**).

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

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2. Click **Feature Hierarchies** (left menu). The **Feature Hierarchies** page
appears.

Add Hierarchy Levels

You can add new feature levels (definitions) at any time. These levels define the
parent/child relationship between fields. Only Global Administrators can add
hierarchy levels to features.

! **IMPORTANT:** You cannot delete or reorder existing levels once any group
configurations are assigned at that level in the Groups Configurations tools.
However, you can add new levels – up to ten – to the bottom of the hierarchy.

Also, whenever possible, test and confirm the structure in TEST when the data
can still be purged if changes need to be made.

▶ *To add a hierarchy level:*

1. On the **Feature Hierarchies** page, select the desired feature.

2. Click **Modify Hierarchy**. The **Hierarchy for Feature** window appears.

Hierarchy for Feature: Expense Reports

☐ Create new source list

Source List: Employee Groups   ▾

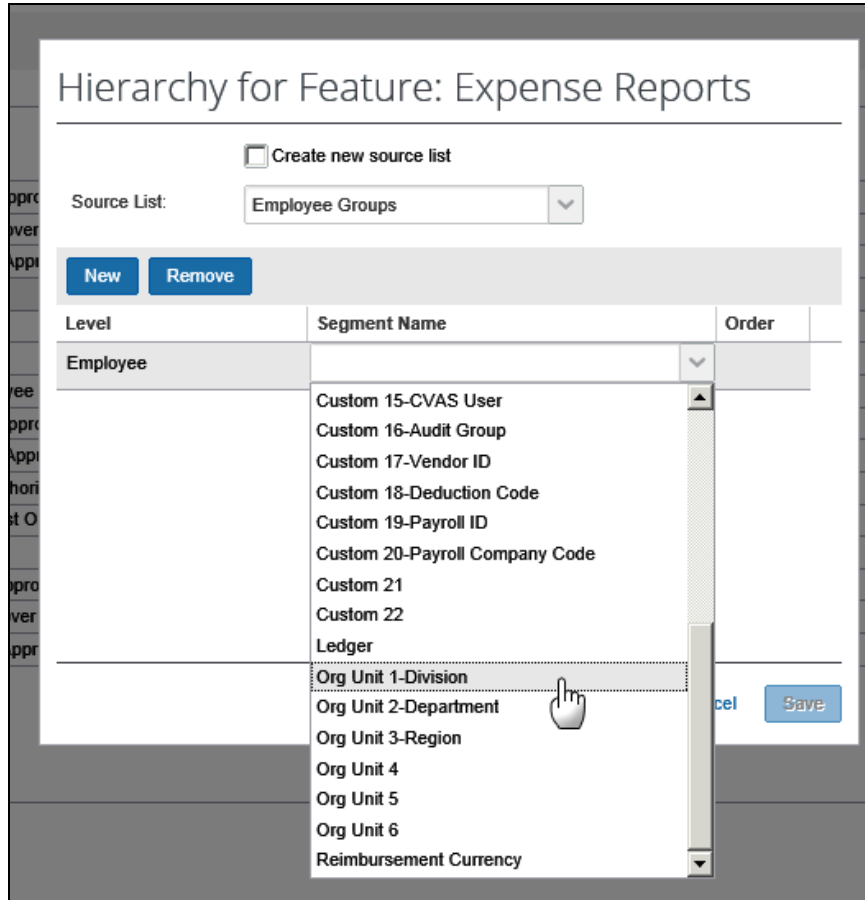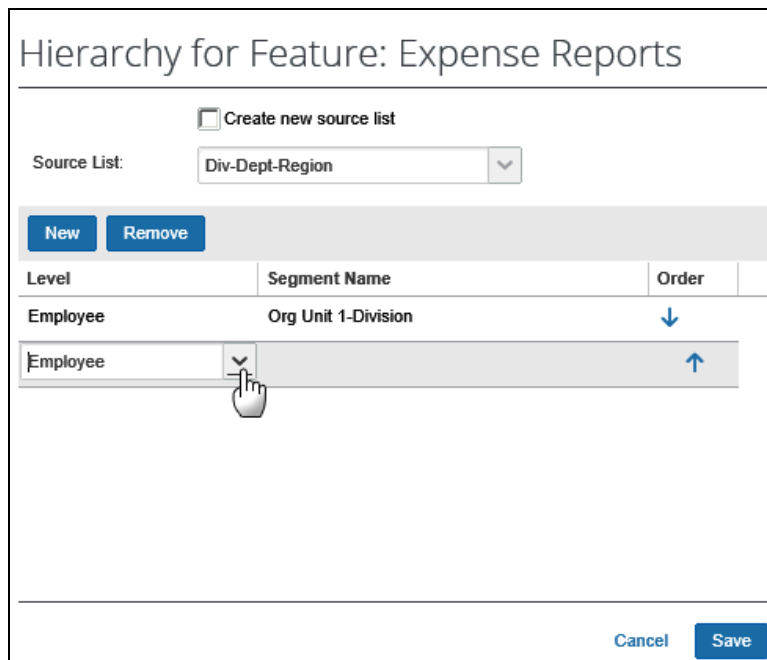[New] [Remove]

Level	Segment Name	Order	

Cancel   Save

3. Either create or select a **Source List**.

   ♦ To create a new list, select the **Create new source list** check box and type the new name in from the **Source List Name** field.

   ♦ To use an existing list, select the desired list from the **Source List** drop down.

4. To create a new hierarchy level, click **New**. A new line appears in the window.

5. Select the appropriate **Level**.

6. Select the appropriate **Segment Name**.

7. Repeat as many time as desired to define the hierarchy.

8. Click **Save**.

Reorder Hierarchy Levels

Hierarchy levels determine the parent/child relationship. Depending upon the type of hierarchy, such as Employee or Expense, and the type of the fields that define hierarchy levels, there may be restrictions on how these fields can be reordered. The selections available in the dropdown for reordering levels will reflect this. For example, if a hierarchy has fields from both the Employee and Report Entry forms, then all employee fields must be together, such as, they must not have entry fields in between, and these fields must be above all the Report Entry fields.

NOTE: For configuration hierarchies (Employee, Expense, Invoice, Reporting), if there is a group configuration defined at a level, then it cannot be reordered. Only levels below the last level with a configuration defined can be reordered.

▶ *To reorder a hierarchy level:*

1. On the **Feature Hierarchies** page, select the desired feature.

2. Click **Modify Hierarchy**. The **Hierarchy for Feature** window appears.

3. Click the arrow in the **Order** column to move a level up or down in the hierarchy.
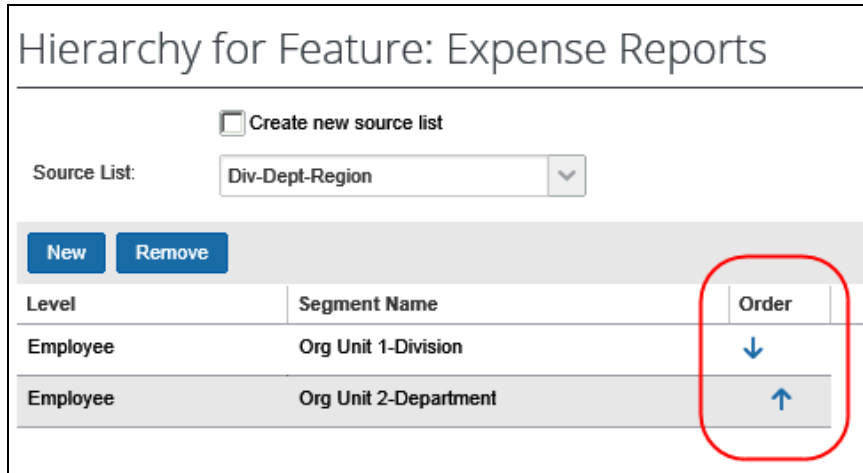
4. Click **Save**.

Remove Hierarchy Levels

! **IMPORTANT:** Hierarchy levels that are already in use cannot be removed. Only levels below the last hierarchy level that has a configuration defined can be removed.

▶ *To remove a hierarchy level:*

1. On the **Feature Hierarchies** page, select the desired feature.

2. Click **Modify Hierarchy**. The **Hierarchy for Feature** window appears.

3. Select the desired hierarchy level.

4. Click **Remove**.

Edit Hierarchies

Ideally, configuration hierarchies are created when the system is initially set up. Configuration data is defined at that time for different sets of groups. However, in some instances, configuration settings will need to be changed. Care must be taken not to lose configuration data when changes are made. Thus, it is important to note the following when making changes:

- If groups and configuration data are defined only at the Global Group level, you can modify hierarchies within the Feature Hierarchies tool at any time.

- You can delete one of the lowest levels within a hierarchy if no group or configuration data is defined for that particular level.

- You can remove all defined group or configuration data at the lowest level of a hierarchy and delete that level, if desired.

- You can add extra levels to configuration hierarchies at any time.

For example, in the Company>Division>Department hierarchy used for creating Expense groups, the following would apply:

- As long as we have not defined any groups other than the Global Group, we can freely modify the hierarchy within the Expense feature (such as changing the hierarchy to Company>Country>Division>Department).

- We can then go in and define a group where the Company = SAP Concur, Country = Europe, and Division = Sales.

- After the above changes are made, the hierarchy cannot be freely changed. The only two options we have are:

  ♦ We can add one or more levels below Department.

  ♦ We can delete the Department level since there is no configuration (i.e., no groups defined at that level.

- If we wanted to change the hierarchy to Company>Country Region (i.e., delete the Division and Department levels and add a Region level), we would have to delete all groups (configuration data) at the Division and Department levels, then delete those levels from the hierarchy. Afterward, we could add the Region level to the hierarchy.

▶ *To edit a hierarchy level:*

1. On the **Feature Hierarchies** page, select the desired feature.

2. Click **Modify Hierarchy**. The **Hierarchy for Feature** window appears.

3. Select the field to edit. Make any necessary changes.

4. Click **Save**.

Section 6: Test Configurations

To test whether or not a feature hierarchy has been configured properly:

- **Check group-specific employee details.** Log on as the Employee Administrator or via proxy and view the information for an employee. To verify that the employee is in the correct group, you can check for particular fields, expense types, or other information that would appear only if the employee were assigned to the correct group.

  For example, access the employee information and verify that the region, division, and department are correct.

In this example, assume that the Sales group uses a different employee form than the Development group. Further assume that the Sales employee form contains a custom field that is not found on the Development employee form. Using User Administration, search for an employee in the Sales group and ensure the correct form appears.

- **Check employee import**. The employee import may fail if the group is not configured properly. When the Import/Extract Administrator attempts to import the list data, the **View Run History** report would indicate Failure and error messages would be listed.

Section 7: Edit or Verify Other Group-Aware Areas

If you are creating new audit rules, car configurations, receipt limits, etc., you will have to define the groups that may use those configurations. For example, you can make an audit rule apply only to a certain group.

Also, you must be aware that any employee that can create expense reports or vendor payments and perform other tasks in the system, such as process reports or approve reports, then they cannot approve or process their own expense reports or invoices. So, you must make sure that there are groups created that allow another

processor or approver to have the rights to process or approve that person's reports or requests.

Section 8: What the User Sees

The information in feature hierarchies will be – for the most part – invisible to the end user. However, based on the group the employee belongs to, they will be able to access the information available to that group.

Items that might be visible to the user based on feature hierarchies include the following:

- Specific policies based on user group. For example, an employee in the Sales Department might see warning messages based on the set of limits that apply to their group, while the Marketing Department might see another.

- Fields on a form. For example, the **Tax Amount** field may not be visible on an expense entry if the employee's group is not configured to use the Tax feature.

If employee data does not map correctly to a feature, the end user may see a message saying that they are not assigned to a particular group for that feature and need to contact their SAP Concur administrator. The administrator will want to ensure that settings in the Features hierarchy are correct to prevent this from happening.

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