Standard Edition: Analytics Essentials and Analytics

User Guide

Last Revised: September 17, 2019

Applies to these SAP Concur solutions:

☒ Expense
  ☐ Professional/Premium edition
    ☐ Integrated with Professional/Premium Travel
    ☐ Using TripLink
  ☒ Standard edition
    ☐ Integrated with Standard Travel
    ☐ Using TripLink

Table of Contents

Revision History

	Notes/Comments/Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
March 29, 2021	Updated the copyright year; no other changes; cover date not updated
January 8, 2020	Updated the copyright; no other changes; cover date not updated

	Notes/Comments/Changes
September 17, 2019	Modifications throughout
June 25, 2019	Updated the *Data - Near Real Time* section
April 3, 2019	Modifications throughout
February 14, 2019	Updated the copyright; no other changes; cover date not updated
January 25, 2019	Added a note, that when editing a report, the user can also edit the description
December 13, 2018	Added information on Secondary Tile Filters
December 3, 2018	Existing user guide split into: • Standard Edition: Analytics Essentials and Analytics User Guide • Standard Edition: Analytics Essentials and Analytics Dashboards and Reports Catalog
November 15, 2018	Modifications throughout
November 13, 2018	Modifications throughout
November 9, 2018	Added information about: • Travel Dashboard • Travel Booking Details Report
October 25, 2018	Modifications throughout Added information about: • Analytics help documentation
September 20, 2018	Added information about: • Invoice dashboard • Allocations Details report
September 6, 2018	Added the *Reports – Personalized Standard Reports (Analytics Essentials Only)* section
August 21, 2018	Modifications throughout
July 20, 2018	Modifications throughout
July 17, 2018	Modifications throughout Added information about: • Dashboard/Report sharing • Invoice Aging report
May 1, 2018	Modifications throughout
January 22, 2018	Removed the DRAFT watermark; changed the copyright; no content changes; no change to the rev date on the cover
November 27, 2017	Initial publication

Analytics Essentials and Analytics – User Guide

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: Overview

Analytics Offerings

Analytics Essentials is a no-cost reporting option that is available to clients using SAP Concur's Standard Edition if they have not already purchased SAP Concur's Intelligence product. Essentials users can:

- View all standard dashboards and reports
- Use selected Actionable Analytics notifications/alerts

Analytics is a purchased product that is available to clients using SAP Concur's Standard Edition if they have not already purchased SAP Concur's Intelligence product. Analytics users can:

- View all standard dashboards as well as create custom dashboards
- View all standard reports as well as create and schedule custom reports
- Share custom dashboards and reports with the rest of the company
- Use all Actionable Analytics notifications/alerts

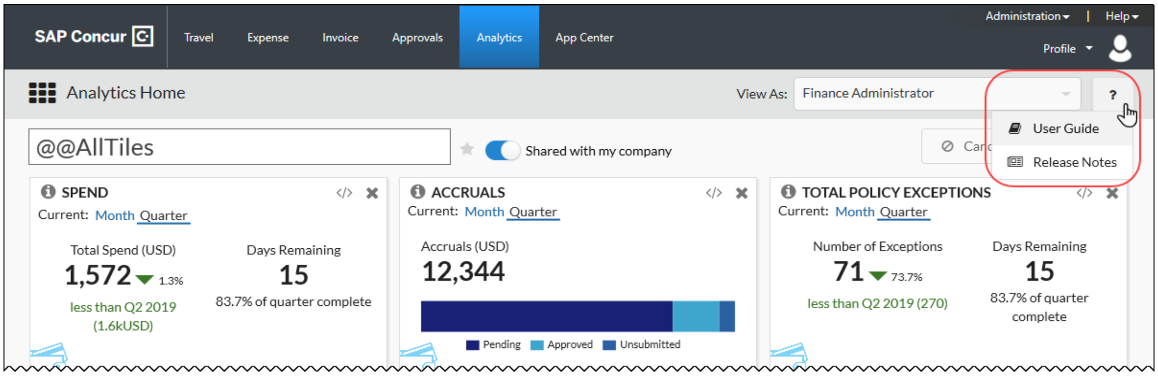
The features described in the guide apply to both Essentials and Analytics users unless otherwise noted.

Two Guides

There are two guides available for Analytics Essentials and Analytics:

- *Analytics Essentials and Analytics Dashboards and Reports Catalog*: This guide provides samples of all of the dashboards and reports.
- *Analytics Essentials and Analytics User Guide*: This guide provides information about permissions; locating, customizing, filtering, searching, saving, scheduling, etc. the dashboards/reports; and Actionable Analytics.

Click ? in the upper-right corner of the page to access all guides and release notes.



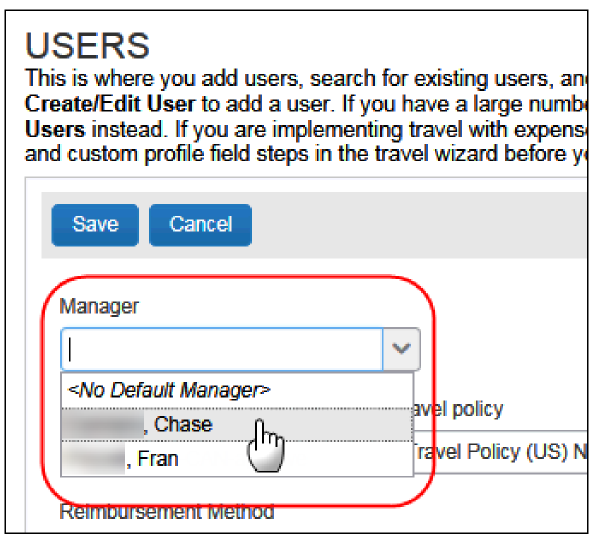
Data – Near Real Time

The data for the dashboards and reports is refreshed as soon as possible in near real-time. This information is collected from the transactional database and then uploaded to the dashboards and reports.

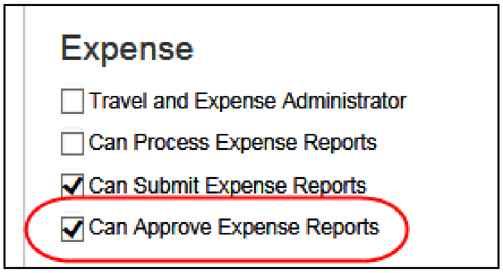
Permissions

Both products – Essentials and Analytics – are available via the **Analytics** menu. The **Analytics** menu is available to users with these permissions.

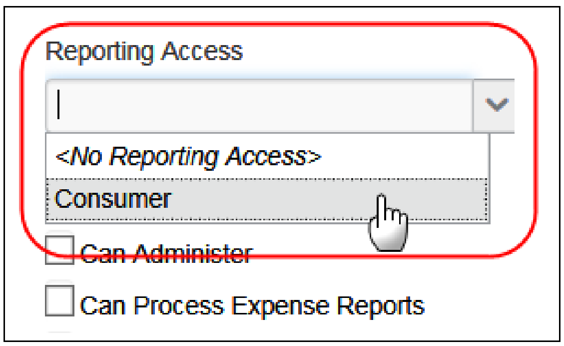
- **Manager:** If the user's name is selected in the **Manager** list (in the **Users** section of the Standard Edition setup pages) for ***at least one*** user:



NOTE: In order for a user's name to appear as an option in the **Manager** list, the user must be assigned the **Can Approve Expense Reports** permission (in the **Users** section of the Standard Edition setup pages).

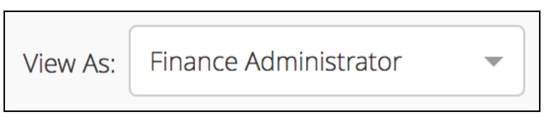


- **Finance Administrator:** If the user is assigned the *Consumer* role in the **Reporting Access** list (in the **Users** section of the Standard Edition setup pages):



This permission is designed for the CFO or other financial manager. Any user with this permission can see the data for ***all users*** in the entire company.

- **Manager *and* Finance Administrator:** Any user can have both permissions. In this case, the **View As** list appears on the right side of the page.



The user selects:

- *Manager* to view the data of the employees for whom they approve expense reports
- *Finance Administrator* to view the data for the entire company

Section 2: Dashboards – General Information

Dashboard Description Information in the Catalog

Refer to the *Analytics Essentials and Analytics Dashboards and Reports Catalog* for description information about the dashboards and tiles.

Essentials and Analytics

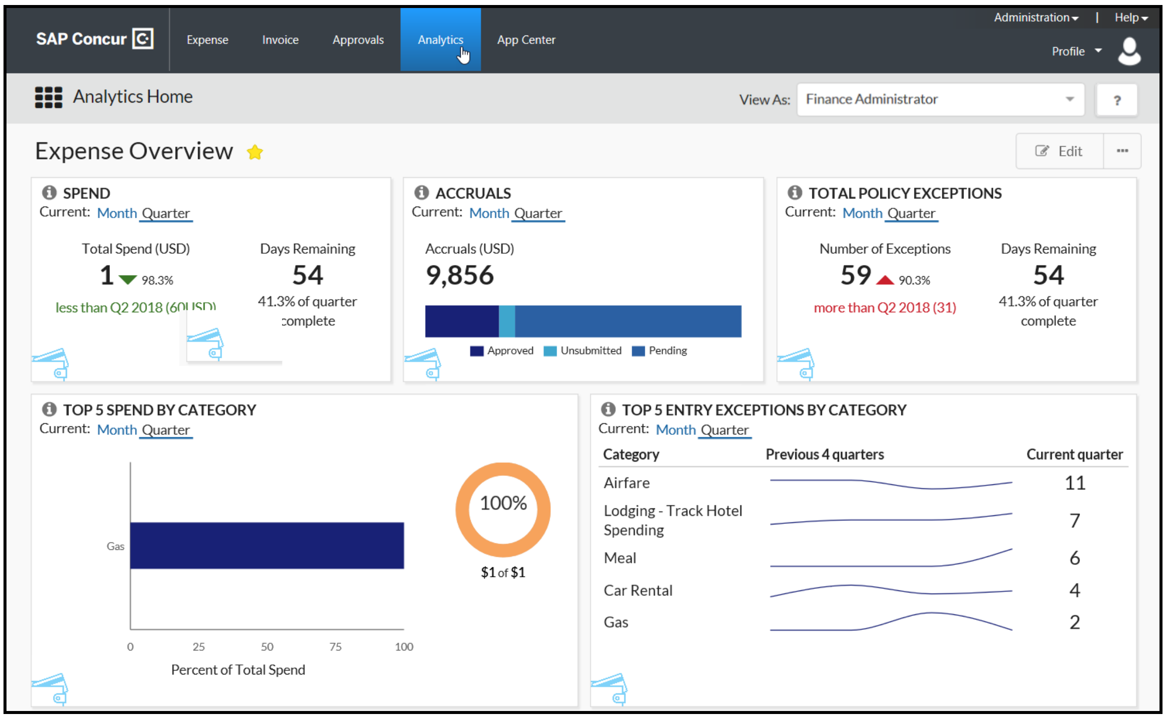
Essentials users can view all standard dashboards.

Analytics users can view all standard dashboards and create custom dashboards.

Access the Dashboards

▶ *To access a dashboard:*

Click the **Analytics** menu.



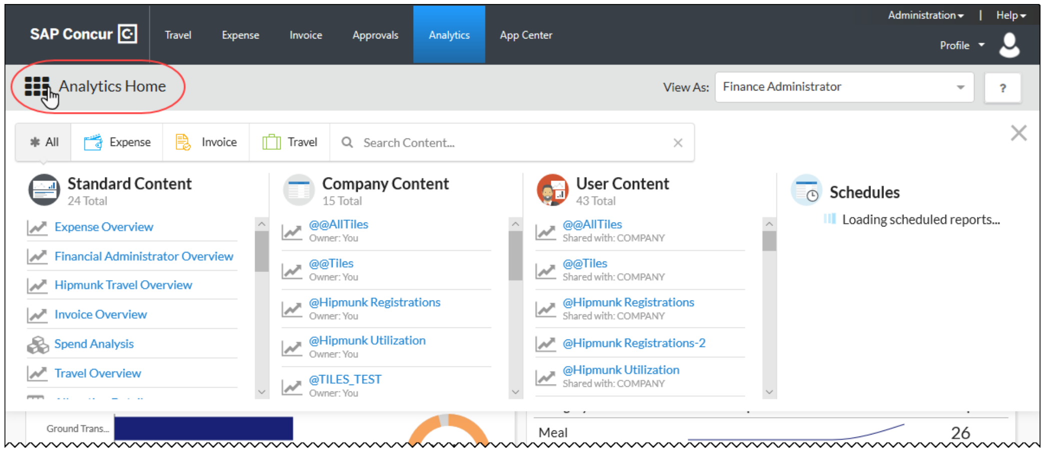
Switch Dashboards

▶ *To switch between dashboards:*

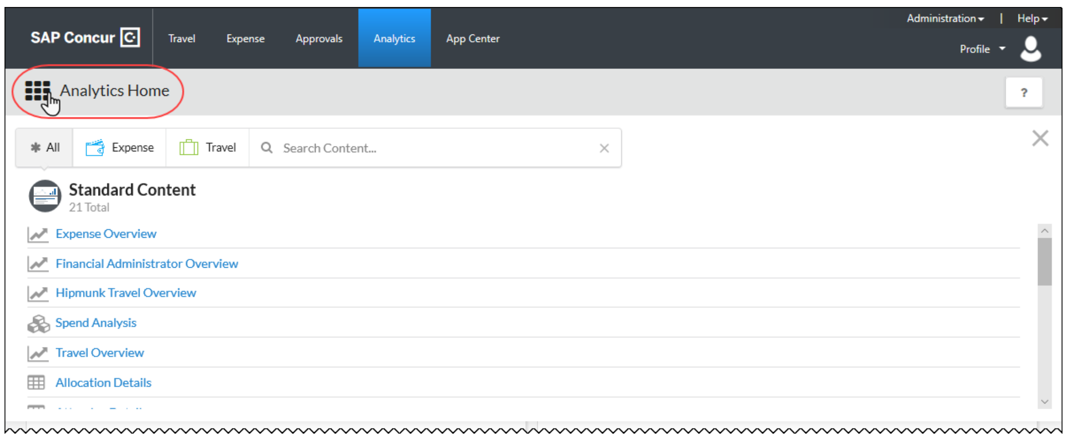
1. Click the menu icon in the upper-left corner of the page. The menu slides down.

NOTE: On the menu, the **Standard Content** option appears for all users. The remaining options appear only for Analytics users.

Analytics view:



Essentials view:



2. Click **All** (the default option) or click **Expense** or **Invoice** to narrow the options.

3. Select the desired dashboard.

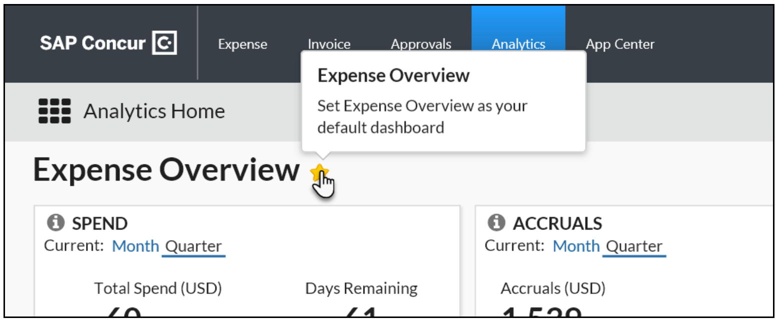
   - To view a standard dashboard, select from the first three items in the **Standard Content** column.
   - To view a shared dashboard (available to Analytics users only; described later in this guide), select from the **Company Content** section of the menu.
   - To view a custom dashboard (available to Analytics users only; described later in this guide), select from the **User Content** section of the menu.

To hide the menu without making a choice, click the menu icon again or click the X in the upper-right corner.

Set a Dashboard as Favorite

To set a dashboard as a favorite:

1. Click the star to the right of the dashboard name to set the dashboard as the default.



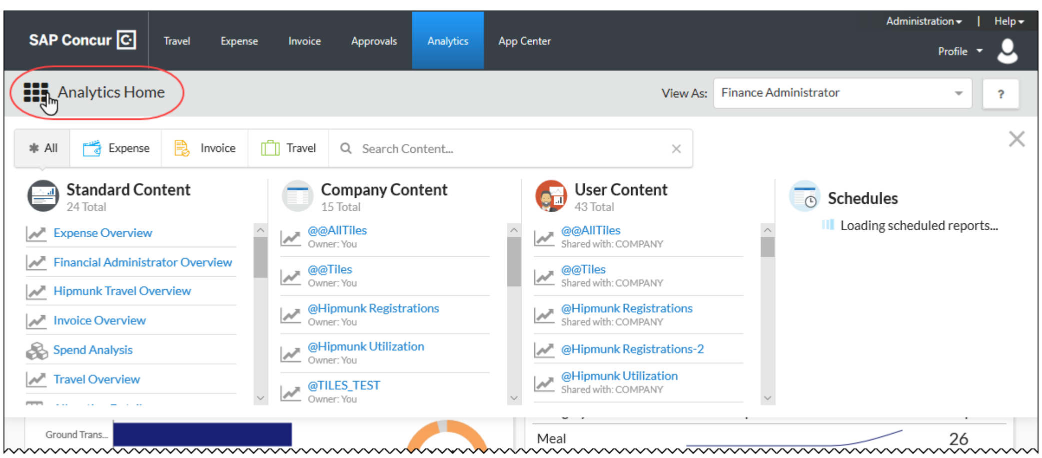
2. A confirmation message appears. Click the "yes" option.

Then, next time you access Analytics, this dashboard appears automatically.

Search

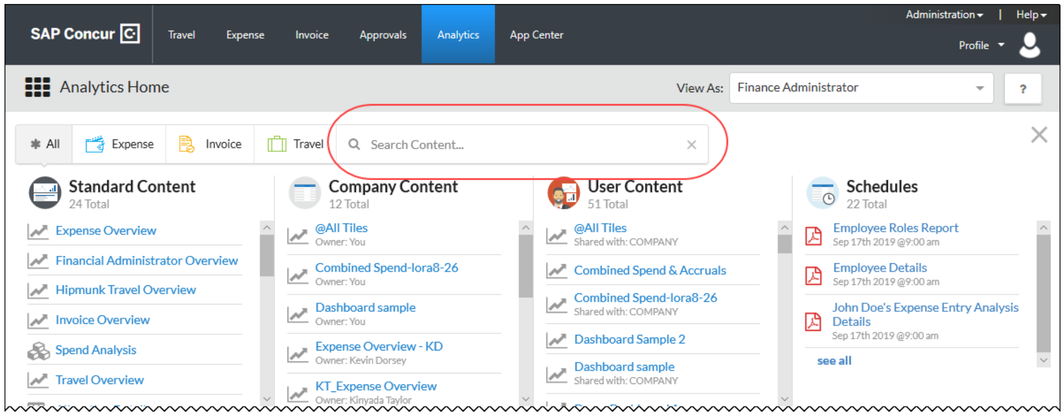
To search dashboards and reports:

1. Click the menu icon in the upper-left corner of the page. The menu slides down.



2. Click **All** (the default option) or click **Expense** or **Invoice** to narrow the search results.

3. Enter the desired search term in the search field. The menu changes to display the search results.

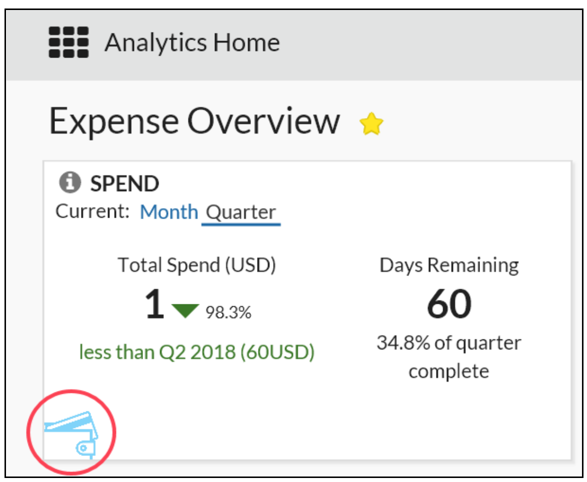


4. Click the desired dashboard or report.

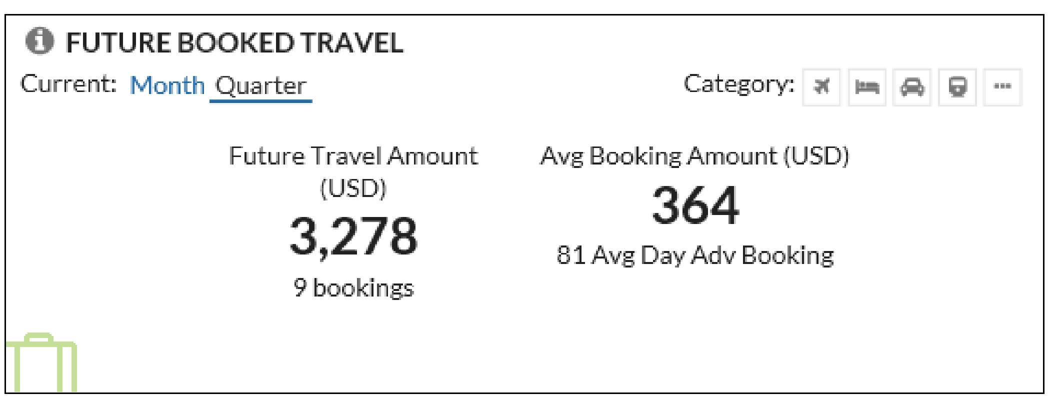
Icons

The icons on the lower-left corner of the tiles indicate the type of data used. There are two different icons:

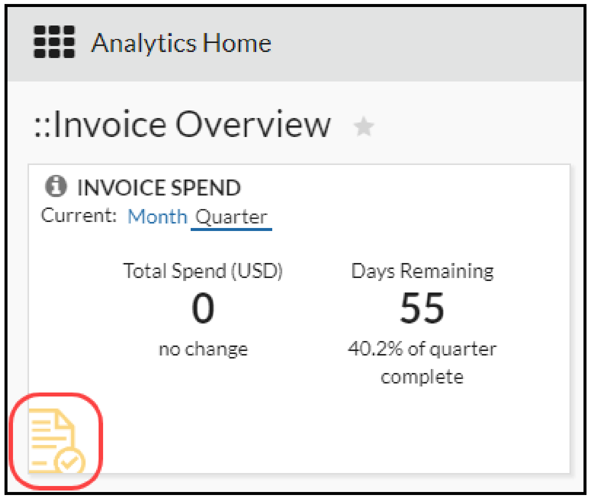
- The  icon indicates Expense data



- The icon indicates Travel data



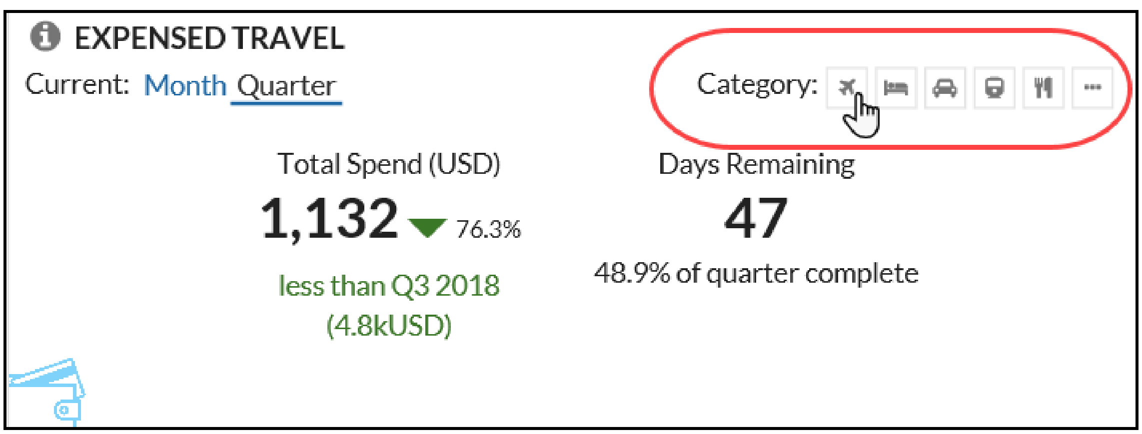
- The  icon indicates Invoice data



Secondary Tile Filters

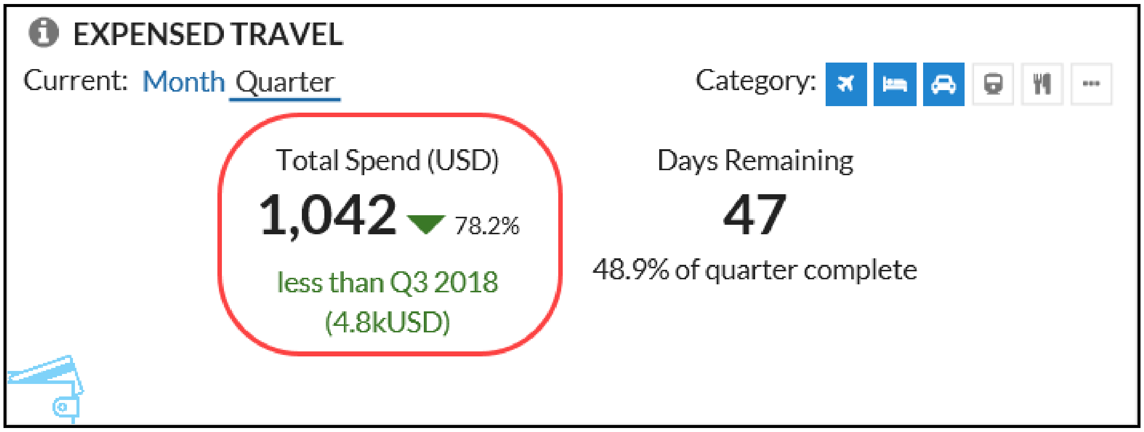
These filters enable users to filter the total spend/accruals by category.

From the **Travel Overview** window, the user clicks the desired categories on the **Expensed Travel** tile.



NOTE: By default, the total spend shown on this tile represents all categories.

Once the user has selected all the desired categories, then the total spend is updated accordingly.



Section 3: Dashboards – Customize (Analytics Only)

Persona Dashboards

Only personal dashboards can be customized.

Essentials and Analytics

Only Analytics users can add, move, remove, and resize tiles on persona dashboards. They can also share custom dashboards with the rest of the company.

Save Custom Persona Dashboards

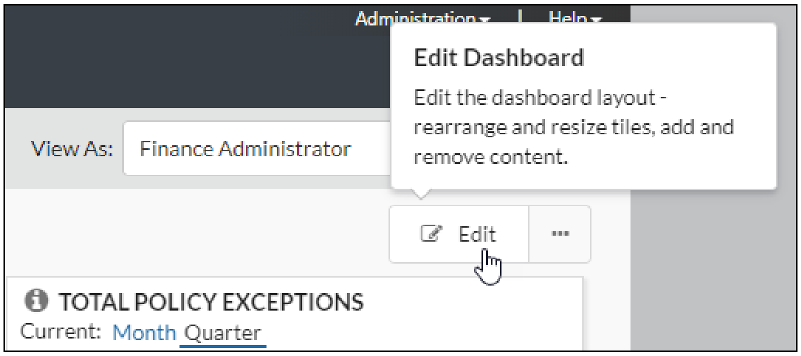
You can start by opening one of the standard dashboards or by opening one of the dashboards you have already customized. When done:

- If you started with a standard dashboard, then you must save your custom dashboard with a different name; you cannot overwrite a standard dashboard.
- If you started with one of your own custom dashboards, you can give it a new name or use the same name to overwrite the original.

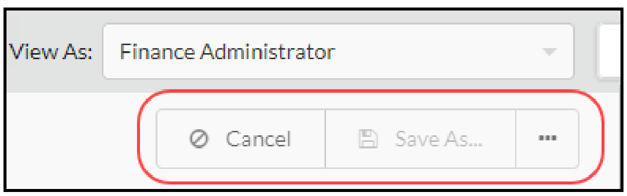
Add New Tiles

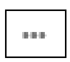
➤ ***To add tiles to your dashboard:***

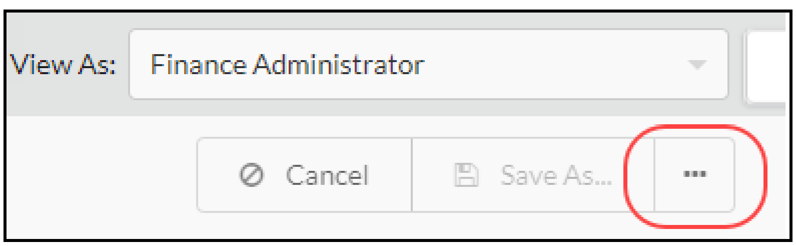
1. Click **Edit** in the upper-right corner of the page.



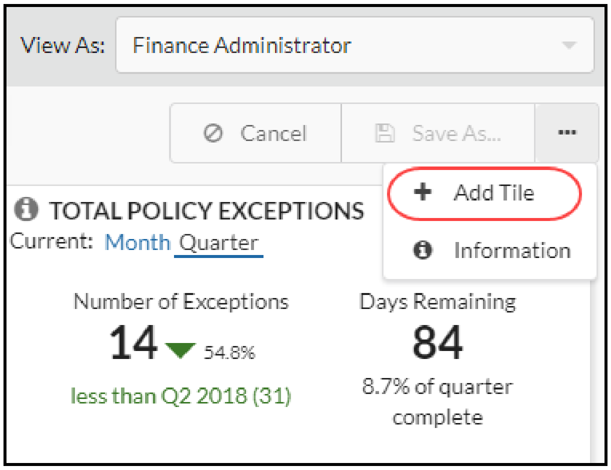
The edit bar appears.



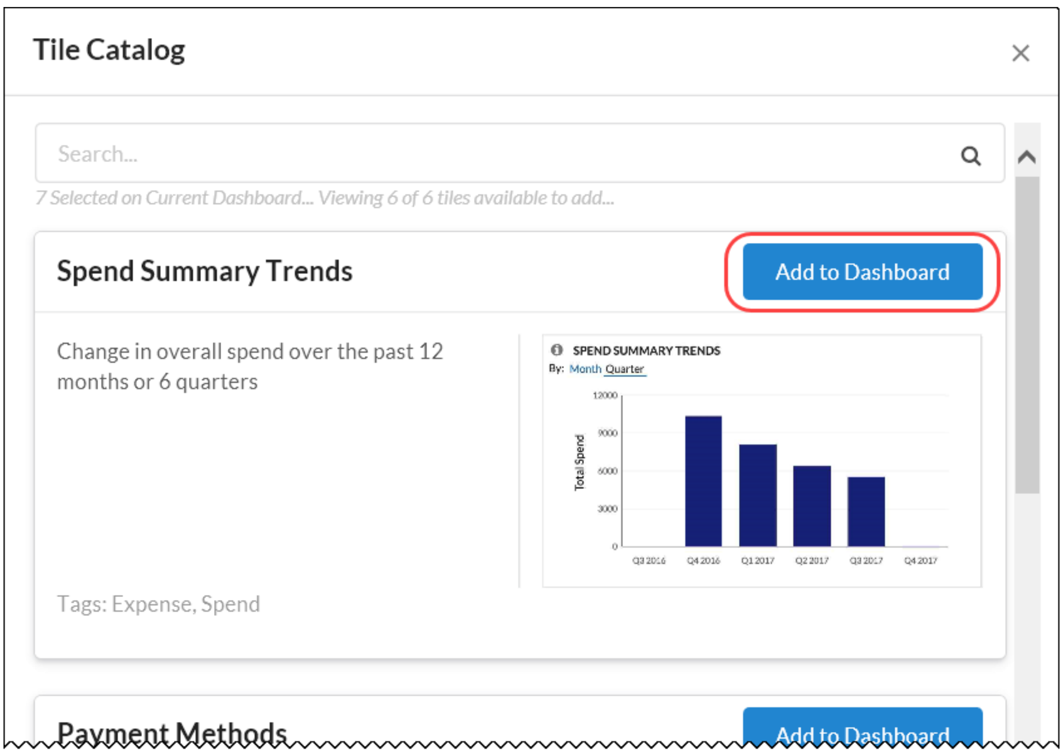
2. Click the  icon on the edit bar.



3. Click **Add Tile**.



The **Tile Catalog** window appears with a list of available tiles.



NOTE: This is just an example. The options can vary by dashboard.

4. Click **Add to Dashboard** for the desired dashboard. The tile moves immediately to the bottom of the dashboard.

NOTE: You can use the search area to locate the desired tile.

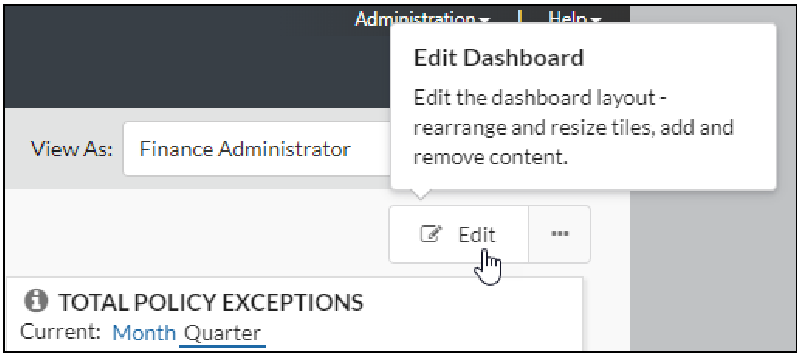
5. Repeat these steps to add additional tiles, if desired.

6. When done, click the X in the upper-right corner to close.
7. If you are ready to save, refer to *Save Your Custom Dashboard* below.

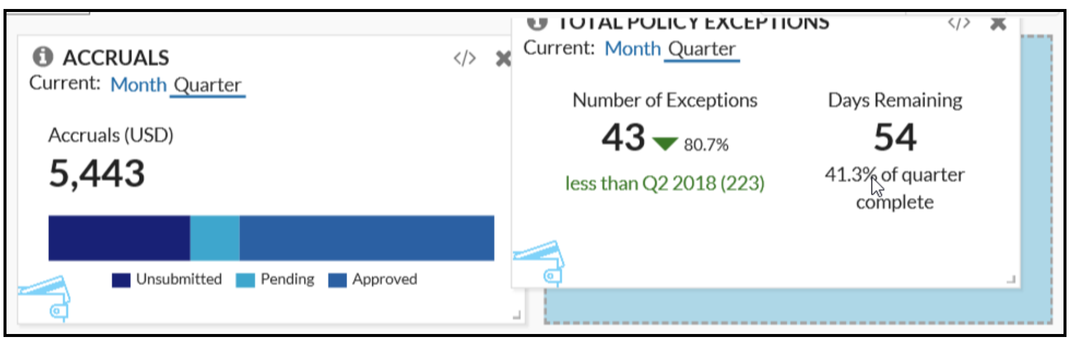
Move/Rearrange Tiles

To move or rearrange tiles:

1. Click **Edit** in the upper-right corner of the page.



2. Once in edit mode, the tiles can be moved. Drag-and-drop the desired tile to the new location.

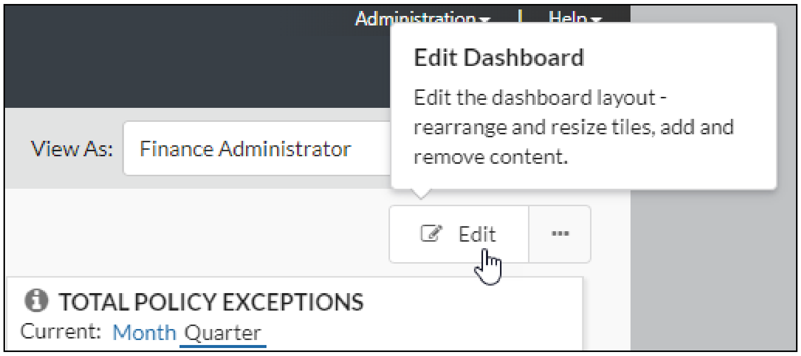


3. If you are ready to save, refer to *Save Your Custom Dashboard* below.

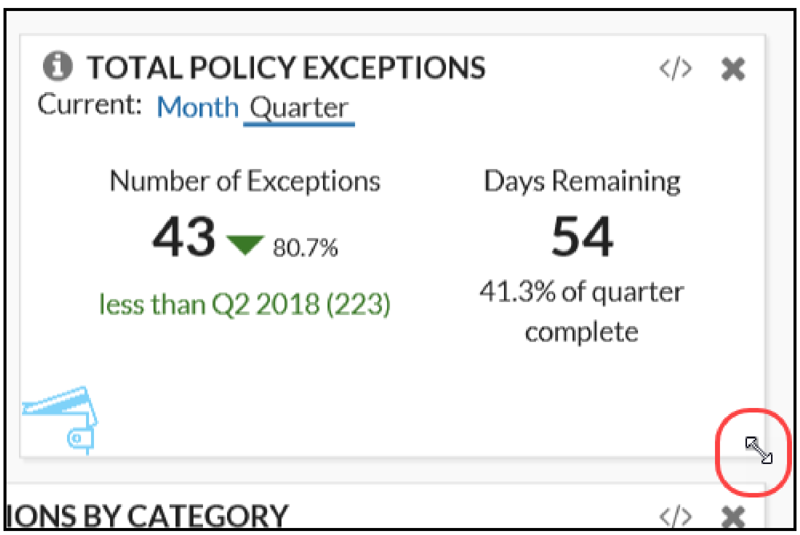
Resize Tiles

► ***To resize tiles:***

1. Click **Edit** in the upper-right corner of the page.



2. Once in edit mode, the tiles can be resized. Grab the lower-right corner and drag to the desired size.

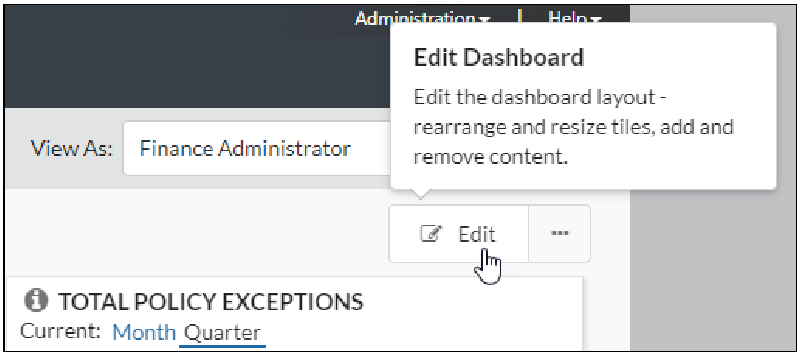


3. If you are ready to save, refer to *Save Your Custom Dashboard* below.

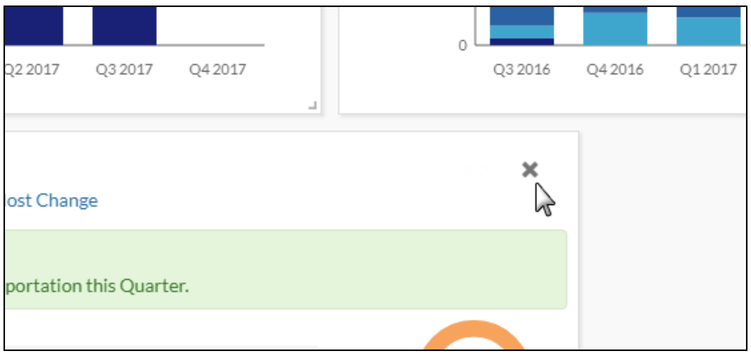
Remove Tiles

► ***To remove tiles:***

1. Click **Edit** in the upper-right corner of the page.



2. Once in edit mode, the tiles can be removed. Click the x in the upper-right corner of the desired tile.



NOTE: The tile is not actually deleted; it moves back to the list of available tiles on the **Tile Catalog** window.

---

3. If you are ready to save, refer to *Save Your Custom Dashboard* below.

Save Your Custom Persona Dashboard

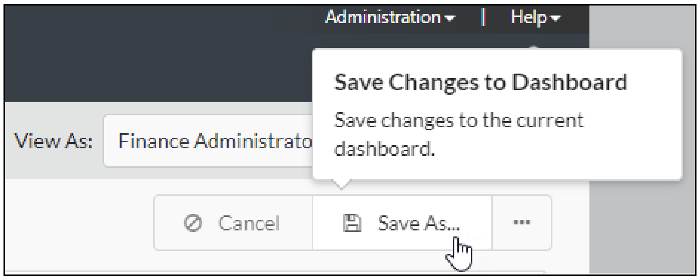
As noted previously, you cannot save (overwrite) a standard dashboard. So:

- If you started with a standard dashboard, then you must save your custom dashboard with a different name; you cannot overwrite a standard dashboard.
- If you started with one of your own custom dashboards, you can give it a new name or use the same name to overwrite the original.

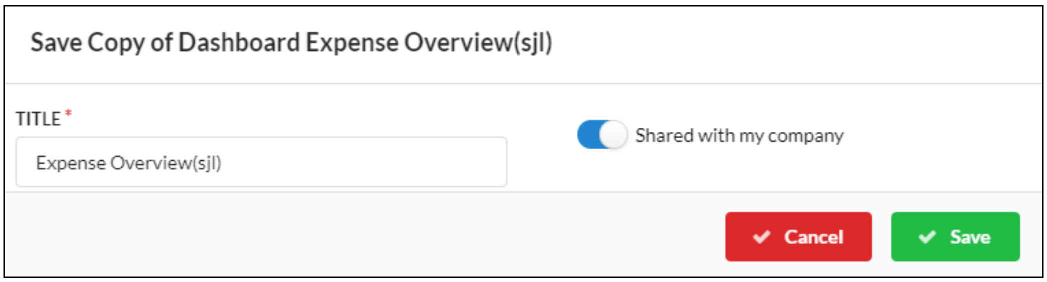
NOTE: To cancel your changes without saving, on the edit bar, click **Cancel**.

▸ *To save if you started with a standard dashboard:*

1. On the edit bar, click **Save As**.



The **Save Copy of...** window appears.

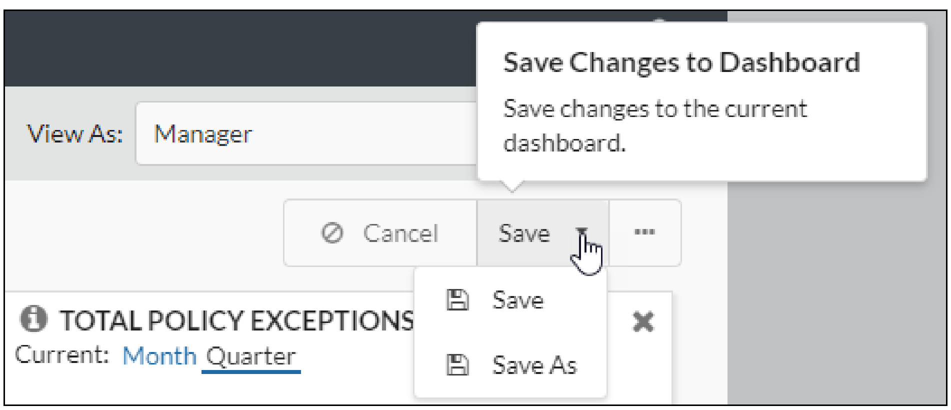


2. In the **Title** field, type the desired title.

3. Click **Save**.

➤ ***To save if you started with a custom dashboard:***

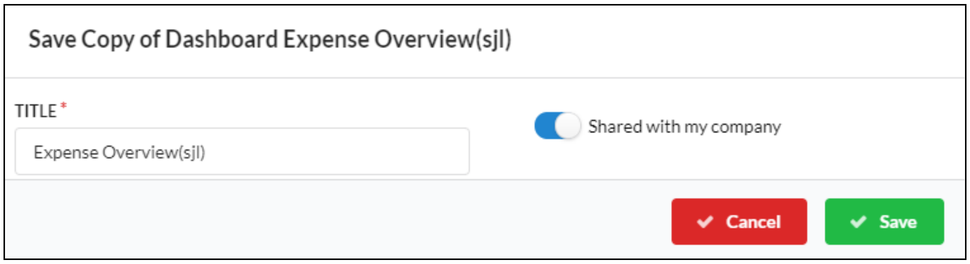
1. On the edit bar, click the down arrow to the right of **Save**.



2. Then, either:

   - Click **Save** to save the dashboard using the existing name.
     – or –

   - Click **Save As**. The **Save Copy of...** window appears.



3. In the **Title** field, type the desired title.

4. Click **Save**.

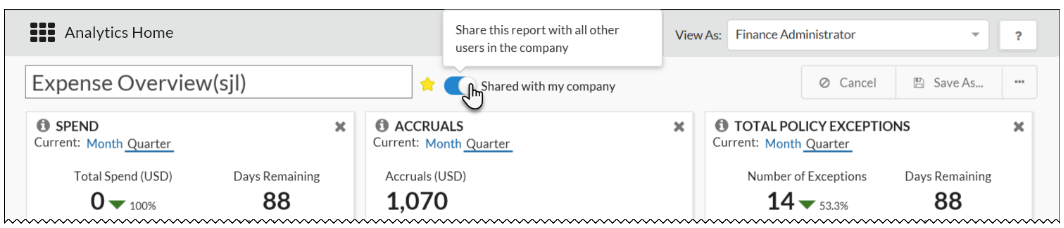
Share Custom Dashboards

Share a Dashboard

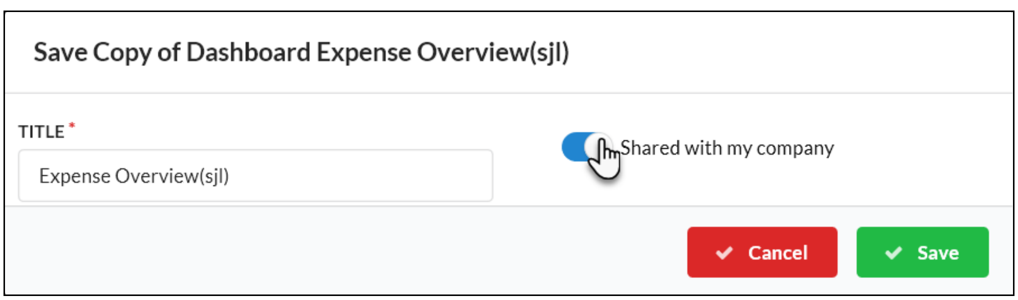
To share a custom dashboard:

Either:

- Before saving a dashboard, slide the **Shared with my company** option.



- While saving a dashboard, slide the **Shared with my company** option.

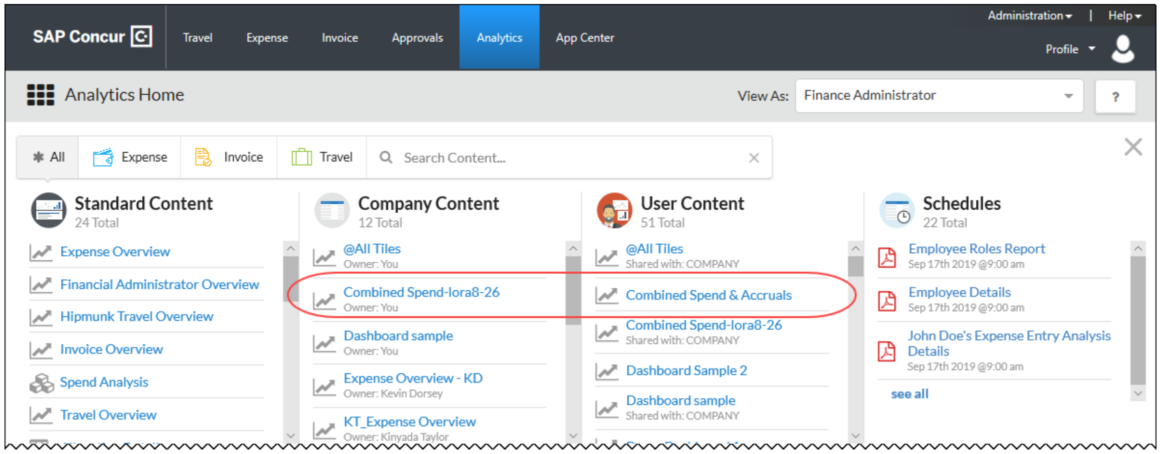


Once the dashboard is saved, it appears in the main menu:

- In the **Company Content** section, showing the owner.

  NOTE: In most cases, the owner's name appears. In certain cases, depending on the reporting structure in the company, *Another Owner* may appear instead. SAP Concur is planning to resolve this issue in a future release.

- In the **User Content** section, showing that it is shared with the company.



Modify the Shared Dashboard

Only the owner of the custom dashboard can modify it. The owner modifies the dashboard as usual.

Once saved, the modified dashboard is available to the company.

Discontinue Sharing

Only the owner of the custom dashboard can discontinue sharing. To discontinue sharing, the owner uses the same steps for sharing and simply slides the **Shared with my company** option to the "off" position.

Once saved, the dashboard is no longer available in the **Company Content** section of the main menu. In the **User Content** section of the main menu, it no longer shows as shared.

Delete the Shared Dashboard

Only the owner of the custom dashboard can delete it. The owner must first discontinue sharing and then can delete the dashboard as usual.

Once deleted, the dashboard is no longer available in the **Company Content** section or the **User Content** section of the main menu.

Section 4: Reports – General Information

Report Description Information in the Catalog

Refer to the *Analytics Essentials and Analytics Dashboards and Reports Catalog* for description information about the reports.

Essentials and Analytics

Essentials users can view, filter, group, export, and sort all standard reports.

Only Analysis users can view, filter, group, export, share, and sort all standard reports as well as author (customize) and schedule reports.

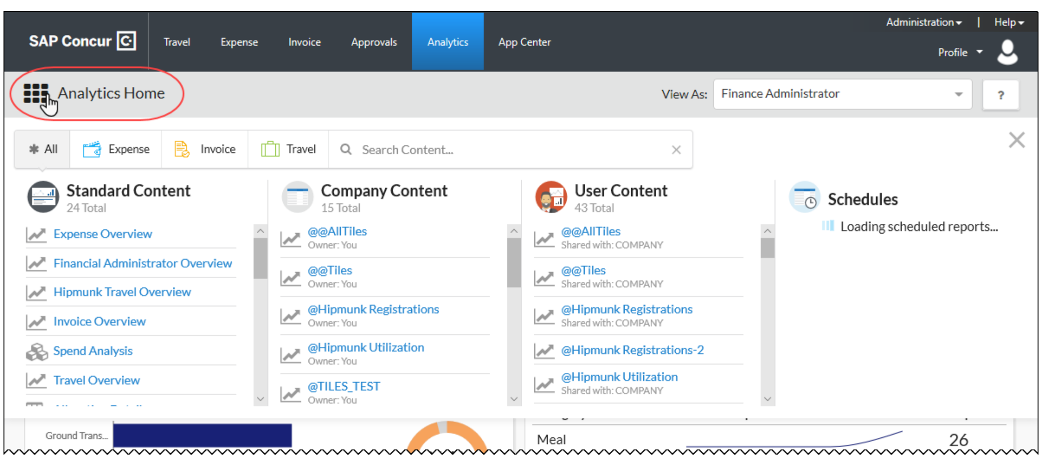
View a Report

To view a report:

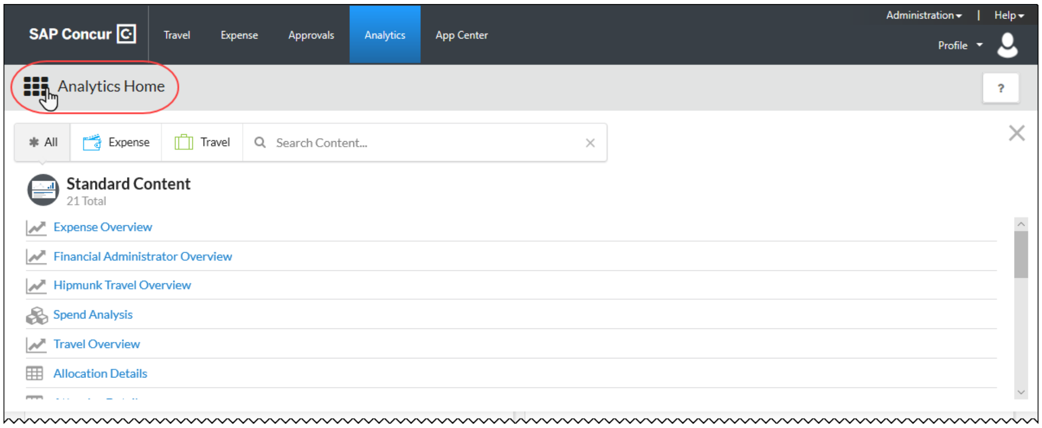
1. Click the menu icon in the upper-left corner of the page. The menu slides down.

NOTE: On the menu, the **Standard Content** option appears for all users. The remaining options appear only for Analytics users.

Analytics view:



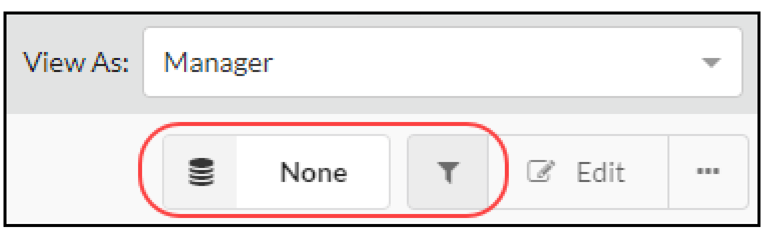
Essentials view:



1. Select the desired report.
   - To view a standard report, select from the reports in the **Standard Content** column.
   - To view a shared report (available to Analytics users only; described on the following pages), select from the **Company Content** section of the menu.
   - To view a custom report (available to Analytics users only; described on the following pages), select from the **User Content** section of the menu.

Icons

As described on the following pages, three of the icons shown below are used for filtering, grouping, and exporting. All users have access to these icons. The other two icons are used for authoring (editing) and scheduling reports. Those two icons are available only to Analytics users.

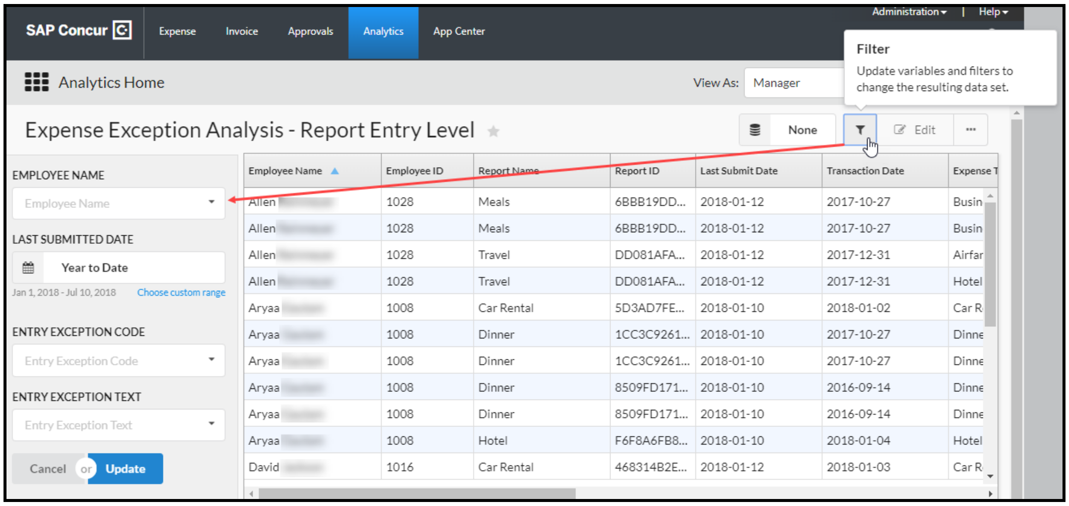


Filter

To filter:

1. Click the icon to use the available filters.

NOTE: Filters are available for all reports and functional dashboards. Persona dashboards do not use this kind of filter. Filters differ by dashboard or report.



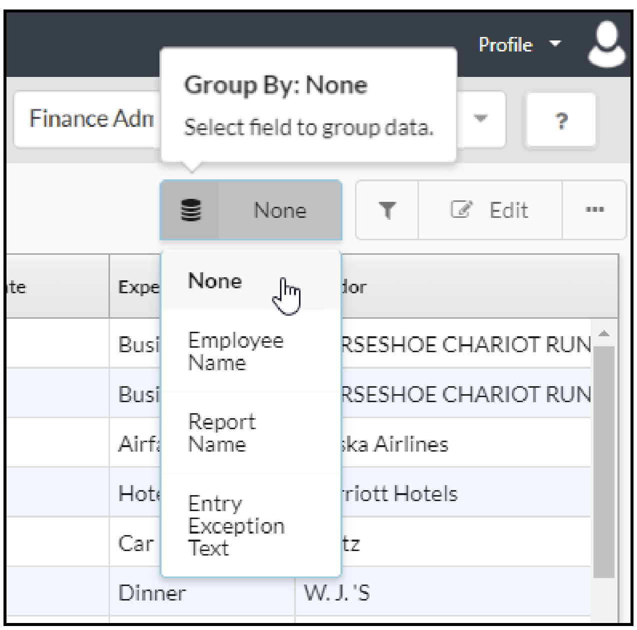
2. Select the desired filter.

3. Click **Update**.

Group By

▶ ***To group:***

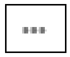
1. Click the icon to group the data.



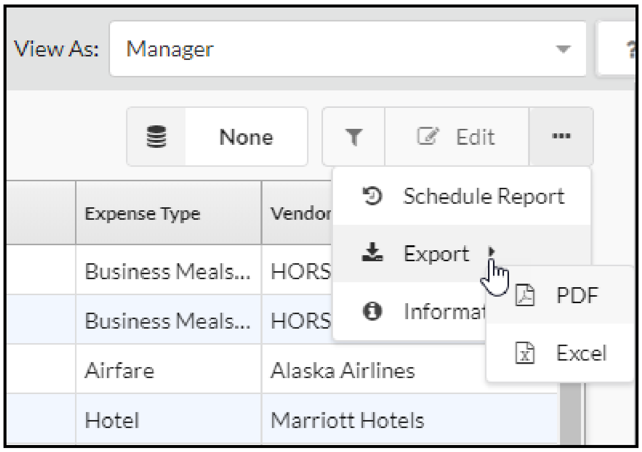
2. Click the desired group-by field.

Export

▶ ***To export:***

1. Click the  icon.

2. Click **Export** to export the report data to Microsoft Excel or PDF.

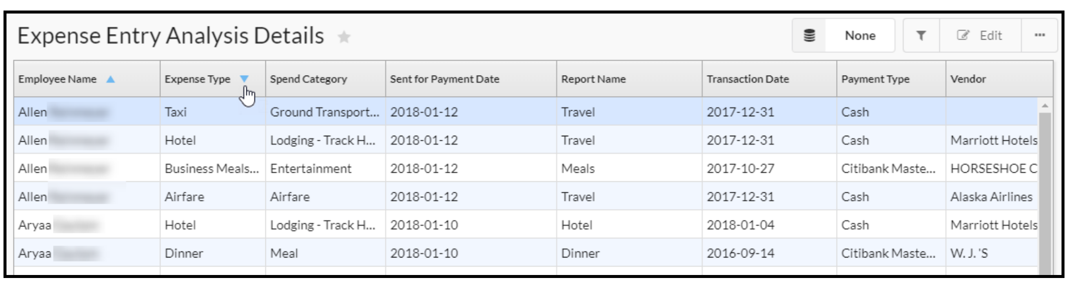


3. Select the desired format.

Sort

▶ ***To sort:***

1. Click the column headings to sort. Sorting can be done on one or two columns. Clicking on the heading of a column sorts it in ascending order.



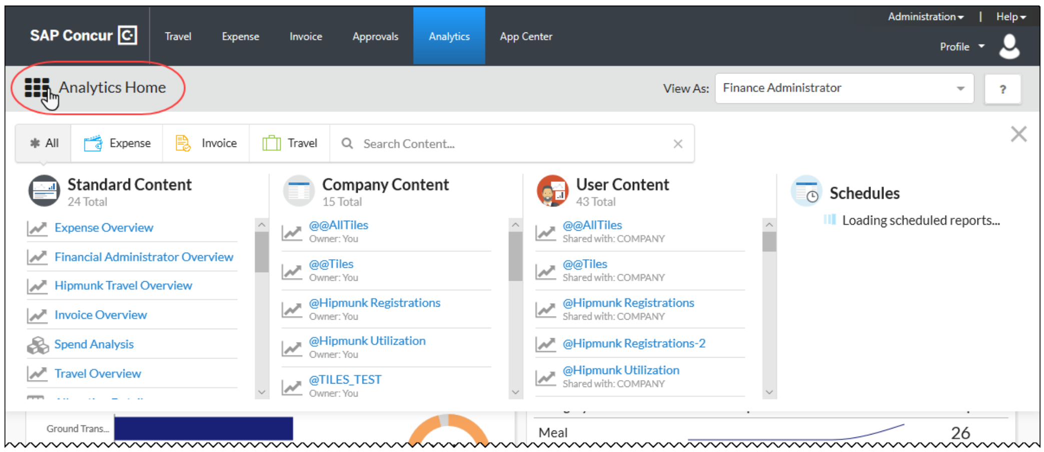
2. Clicking again sorts it in descending order.

3. Clicking it again removes the sorting.

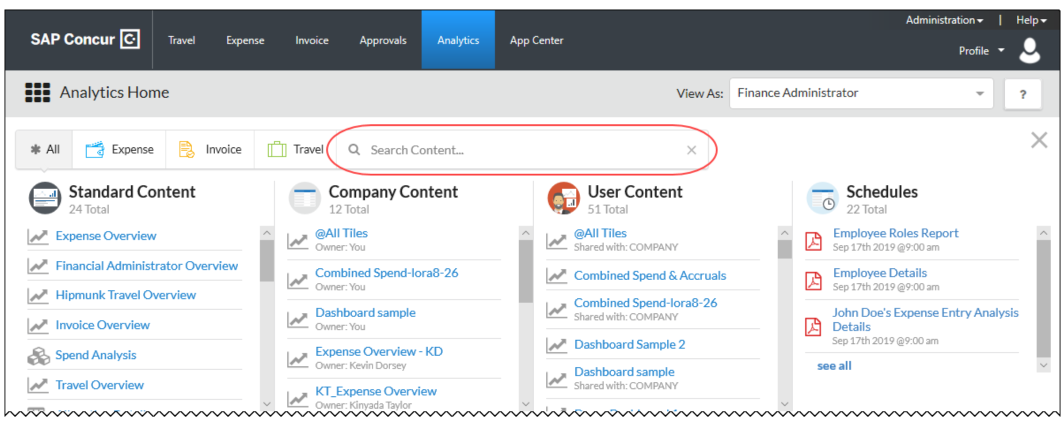
Search

‣ *To search dashboards and reports:*

1. Click the menu icon in the upper-left corner of the page. The menu slides down.



2. Enter the desired search term in the search field. The search results appear.



3. Click the desired dashboard or report.

Section 5: Reports – Personalized (Analytics Essentials Only)

Essentials and Analytics

The Personalized Standard Reports feature is available only to Analytics Essentials users.

Overview

The Personalized Standard Reports feature allows users to personalize their standard reports by adding cost tracking fields.

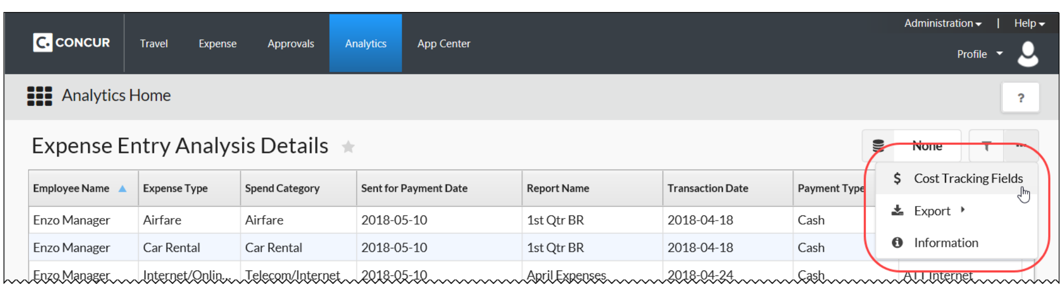
Note the following:

- This feature is available ***only*** to companies that have configured cost tracking fields.
- The personalized report can be viewed only by the user who personalized it. It cannot be shared with other users.
- Only the cost tracking fields can be added; no other fields or aggregations are available for personalization.
- Because of the nature of the data, cost tracking fields are not applicable for some standard reports.

Add, Move, Remove, and Save Cost Tracking Fields in a Standard Report

To add a cost tracking field to a standard report:

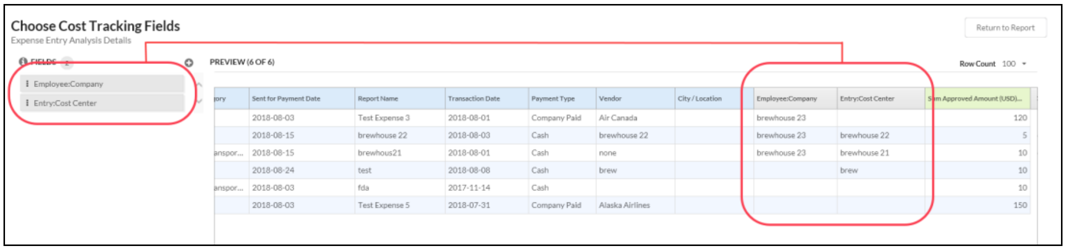
1. With the desired report open, click the  button on the right-side of the report.



2. Click **Cost Tracking Fields**.

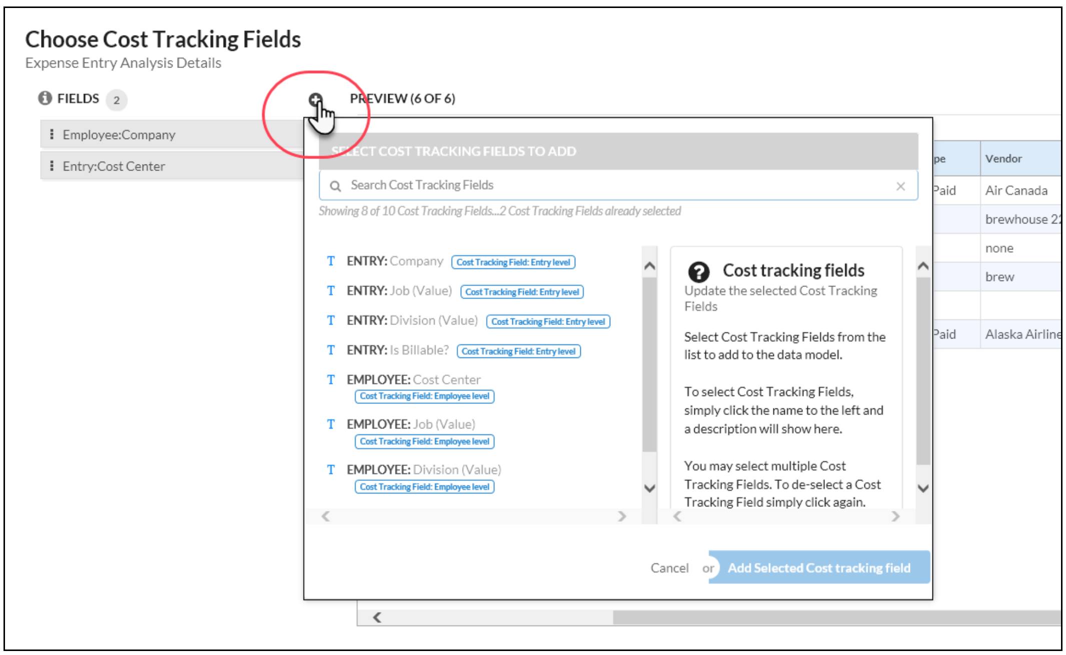
NOTE: The **Cost Tracking Fields** option is unavailable (gray) if the company has not configured cost tracking fields or if cost tracking fields are not applicable for the selected report.

The **Choose Cost Tracking Fields** page appears. If cost tracking fields have already been added to the report, they appear on the left-side of the page and in the report.



NOTE: The cost tracking fields appear in the report in a designated area (gray headers), which is between the standard columns (blue headers) and the aggregate columns (green headers).

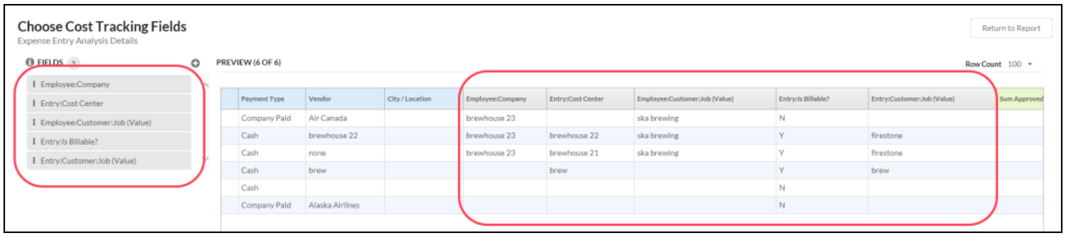
3. To add additional cost tracking fields, click the ⊕ above the fields area. The **Select Cost Tracking Fields to Add** window appears.



NOTE: Any cost tracking fields that have already been added to the report do not appear in this list.

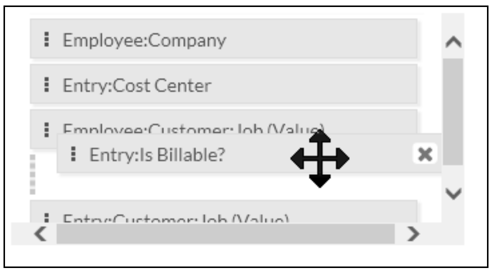
4. Select the field(s) you want to add.

5. Click **Add Selected Cost Tracking Fields**. The fields appear in the report.



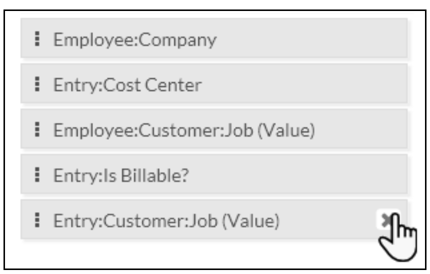
6. You can move (re-arrange) cost tracking fields within the designated area (gray headers) but nowhere else.

   To move a cost tracking field, on the left-side of the page, drag-and-drop the fields into the desired order.



   The columns move accordingly in the report.

7. To remove a field, on the left side of the page:



   - Hover the mouse over a field name. An X appears.
   - Click the X.

   The cost tracking field is removed from the report. In addition, deleted fields now appear in the **Select Cost Tracking Fields to Add** window – to be added again if desired.

8. To save your personalized report, click **Return to Report**. The changes are saved automatically. When you access the report again (even after signing out), the cost tracking fields appear – in the same order – as when you saved.

Section 6: Reports – Authoring (Analytics Only)

Essentials and Analytics

The Authoring feature is available only to Analytics users.

Overview

The Authoring feature allows you to create customized reports. When customizing, you can move, remove, and add fields (columns). You can also add aggregates and grand totals. When adding fields, you can add ***only*** the fields that would be appropriate for the current report.

You start by opening one of the standard reports or by opening one of the reports you have already customized. When done:

- If you started with a standard report, then you must save your custom report with a different name; you cannot overwrite a standard report.
- If you started with one of your own custom reports, you can choose to give it a new name or to use the same name to overwrite the original.

Understanding Aggregates

Some reports have a column on the right that appears to display totals. In fact, it displays an aggregate. There is a distinction between a *total* column and an *aggregate* column. A total column is truly the total of that transaction, card change, or whatever is being displayed. An aggregate is a total of all transactions that match all of the data in the fields ***to the left of it***. In some cases, the total and the aggregate are the same; in some cases, they are not.

In the sample below, the aggregate probably is the same as the total. Given the specific data in all of the columns to the left of the aggregate column, there probably is only one transaction that matches all of that criteria.

Employee Full Name	Expense Type	Spend Category	Sent for Paym...	Report Name	Transaction Da...	Payment Type	Vendor	City / Location	Sum Appro...
Charlie	Car Rental	Car Rental	2017-01-31	One Last Time	2016-09-15	Bank of the We...	Avis	San Diego	405.73
Charlie	Dinner	Meal	2017-01-31	Vegas	2016-09-15	Bank of the We...	SAMMY'S WDFR P...	Henderson	76
Charlie	Dinner	Meal	2017-01-31	San Diego	2016-09-15	Bank of the We...	DENNY'S CORP		27.62
Charlie	Dinner	Meal	2017-02-10	January Spend	2017-01-07	Cash			45
Charlie	Car Rental	Car Rental	2017-01-31	Vegas	2016-09-15	Cash	Alamo	Henderson	157
Charlie	Dinner	Meal	2017-01-31	Vegas	2016-09-14	Bank of the We...	PANEVINO RISTO...	Las Vegas	9
Charlie	Fuel	Gas	2017-01-31	San Diego	2016-09-15	Bank of the We...	UNION 76 002468...	San Diego	24.19
Charlie	Fuel	Gas	2017-01-31	Henderson	2016-08-05	Company Paid			100

However, if you remove some or all of the very specific columns, the aggregate acts more like subtotals, in this case by expense type.

Employee Full Name	Expense Type	Spend Category	Sum Appro...
Charlie	Dinner	Meal	157.62
Charlie	Car Rental	Car Rental	562.73
Charlie	Fuel	Gas	124.19

No Subtotals

Though report authoring provides *grand totals*, it does not provide *subtotals*. One way to obtain subtotals is to have an aggregate field and then pare down the number of fields to the left of it. For example:

- If you remove all fields except the employee name, the aggregate field displays the total for each employee.

Employee Full Name	Sum Appro...
Leonard T	267.56
Charlie L	1540.54
Michael C	1509.1
Jyothsna P	987.39
Abdulrahman I	171.9

- If you remove all fields except the expense type, the aggregate field displays the total for each expense type.

Expense Type	Sum Appro...
Fuel	607.24
Dinner	1407.12
Car Rental	5500.54
Airfare	22587.5
Taxi	218.67

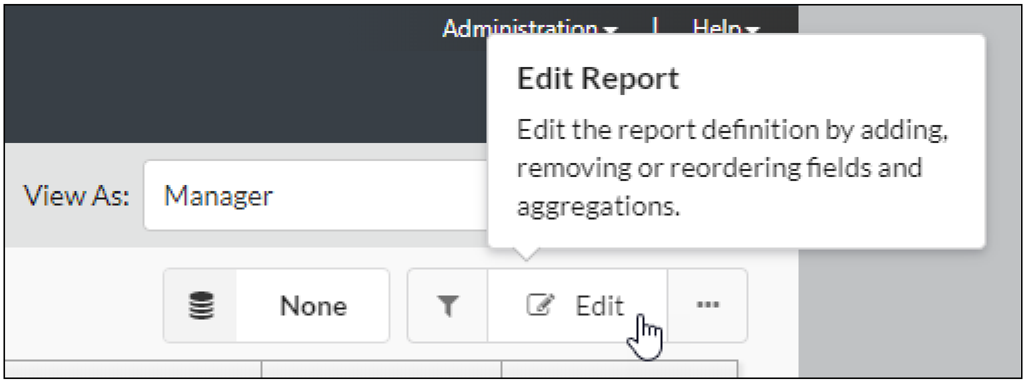
Author a Report

📖 Refer to the *Understanding Aggregates* section of this guide for information about aggregates are different from totals.

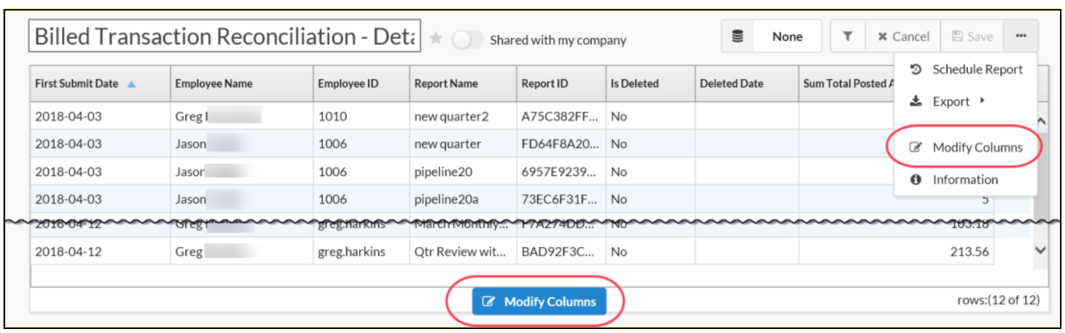
Edit Mode

To access edit mode:

1. Open an existing report.
2. To access edit mode, click **Edit** in the upper-right corner of the page.



3. Click **Modify Columns** – either on the ellipses button or at the bottom of the report.



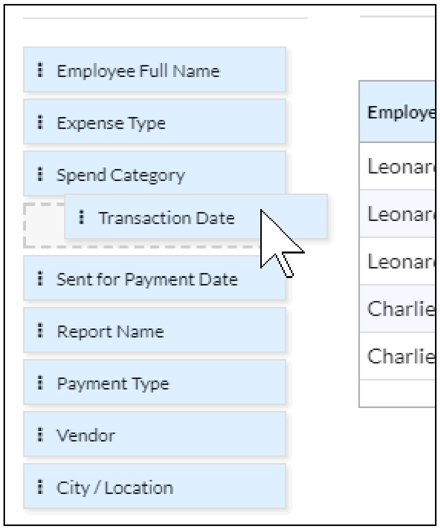
Using this page, you can:

- See the fields/aggregations that are currently on the report (listed on the left side of the page).
- Move the fields that are currently on the report.
- Remove fields/aggregations from the report.
- Add new fields/aggregations to the report.
- Show grand totals.

Move a Field/Aggregation

To move a field/aggregation:

1. While in edit mode, on the left side of the page, drag-and-drop the field up or down to the new location in the list.



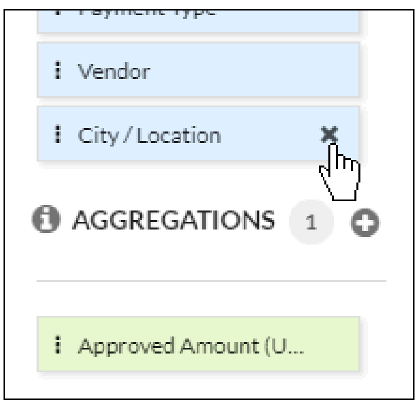
NOTE: You cannot intermix fields and aggregations.

2. If you are ready to save, refer to *Save Your Custom Report* below.

Remove a Field/Aggregation

To remove a field/aggregation:

1. While in edit mode, on the left side of the page, click the x on the right side of the field name.



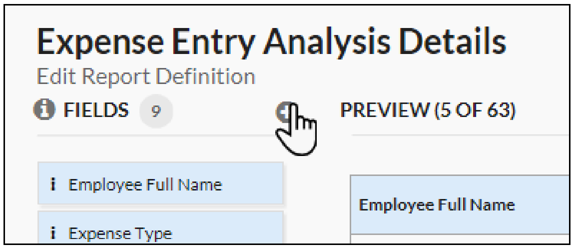
NOTE: You can always access a field you have removed, if desired. When you remove a field, it is moved to the list of available fields that can be added to the current report, as described below.

2. If you are ready to save, refer to *Save Your Custom Report* below.

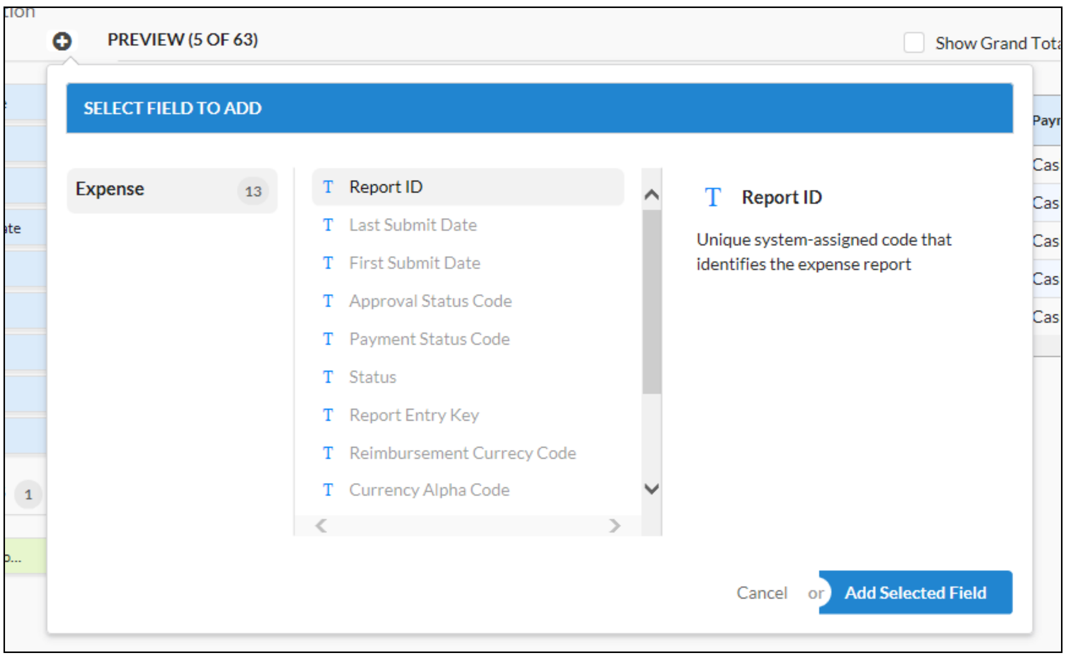
Add a Field

To add a field:

1. While in edit mode, click the ⊕ to the right for the current field count, in this case, 9.



A list of appropriate fields appears, along with a description of each.



NOTE: The list includes ***only*** the fields that would be appropriate to add to the current report.

2. You can add one new field at a time. Click the desired field.

3. Click **Add Selected Field**. The new field appears to the right of all other non-aggregate fields. Move the new field as desired.

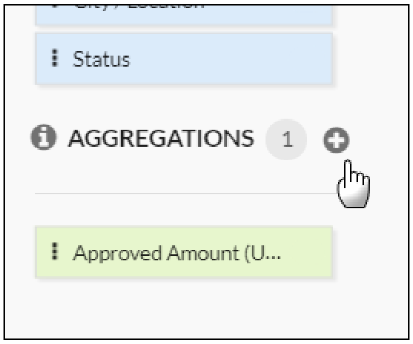
NOTE: You cannot intermix fields and aggregations.

4. If you are ready to save, refer to *Save Your Custom Report* below.

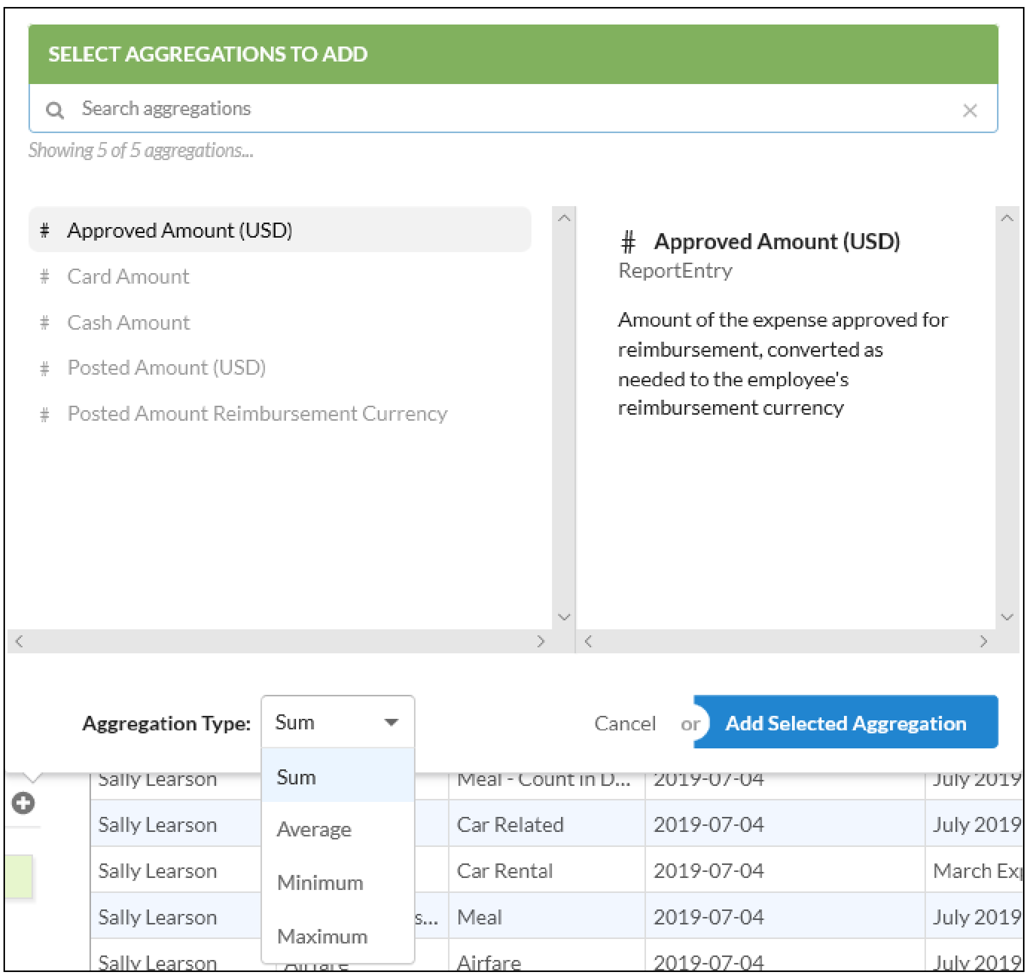
Add an Aggregation

To add an aggregation:

1. Click the ⊕ to the right for the current aggregation count, in this case, 1.



A list of appropriate aggregations appears, along with a description of each.



NOTE: The list includes ***only*** the aggregations that would be appropriate to add to the current report.

2. To select a new aggregation, you can:

   - *In the **Search*** aggregation field*,* enter the desired aggregation.
     -or-
   - Click the desired aggregation from the list.

NOTE: You can add only one new aggregation at a time.

3. In the **Aggregation Type** list, select one of these:

   - Sum
   - Average
   - Minimum
   - Maximum

NOTE: As described in the *No Subtotals* section of this guide, you can create a larger data set by removing columns to the left. For example, the more columns there are, the more specific the resulting data, perhaps resulting in a row that contains one report or one expense entry. In that case, the sum, average, minimum, and maximum are likely all the same. In a broader set (fewer columns), the minimum, maximum, and average become meaningful data.

4. Click **Add Selected Aggregation**. An aggregation is always the right-most column. If there are multiple aggregations, move as desired.

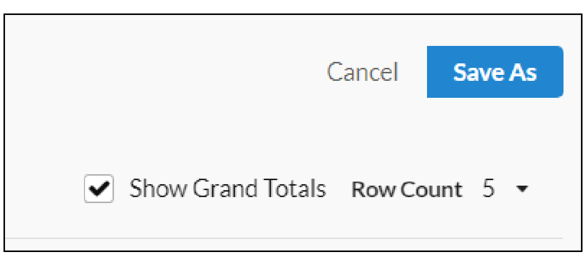
NOTE: You cannot intermix fields and aggregations.

5. If you are ready to save, refer to *Save Your Custom Report* below.

Add Grand Totals

To add grand totals:

1. Click the **Show Grand Totals** check box in the upper-right corner of the page.



2. If you are ready to save, refer to *Save Your Custom Report* below.

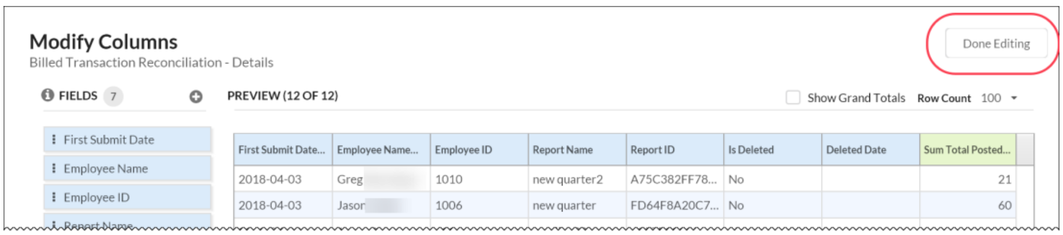
Save Your Custom Report

As noted previously, you cannot save (overwrite) a standard report. So:

- If you started with a standard report, you must provide a new name for the custom report.
- If you started with an existing custom report, you can either *save* (overwrite) the existing report or you can *save as* using a different report name.

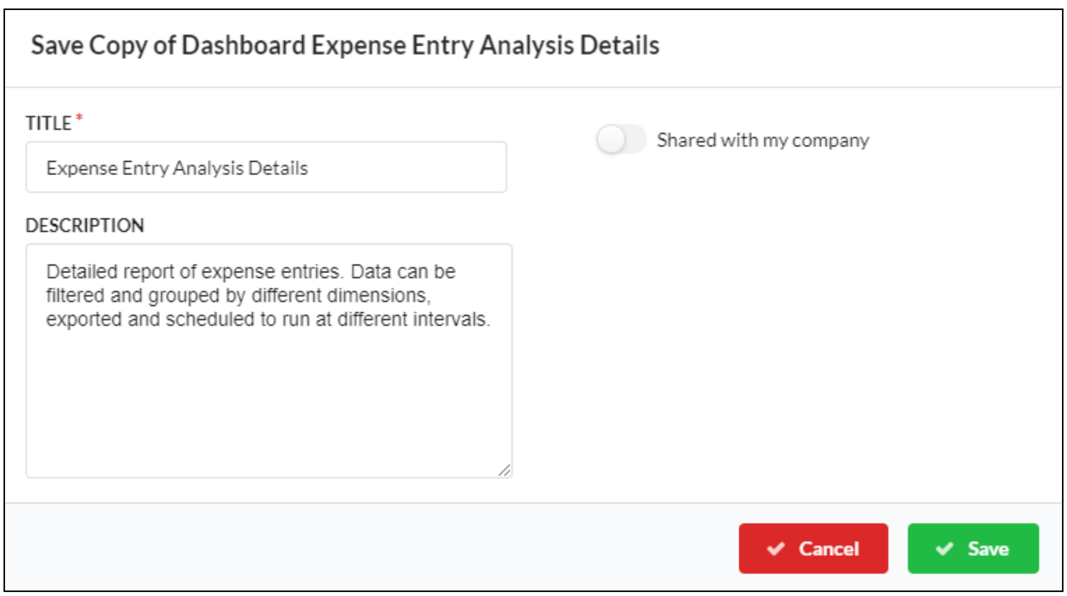
To save if you started with a standard report:

1. After making all of the desired modifications, click **Done Editing**.



   You are returned to the previous page.

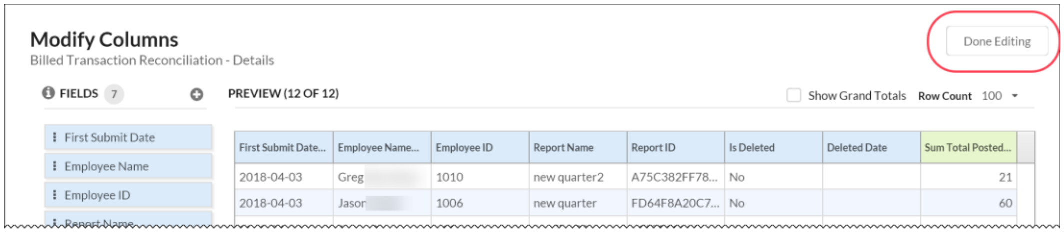
2. Click **Save As**. The **Save Copy of…** window appears.



3. In the **Title** field, type the desired title.
4. In the **Description** field, make the appropriate changes.
5. Click **Save**.

► *To save if you started with a custom report:*

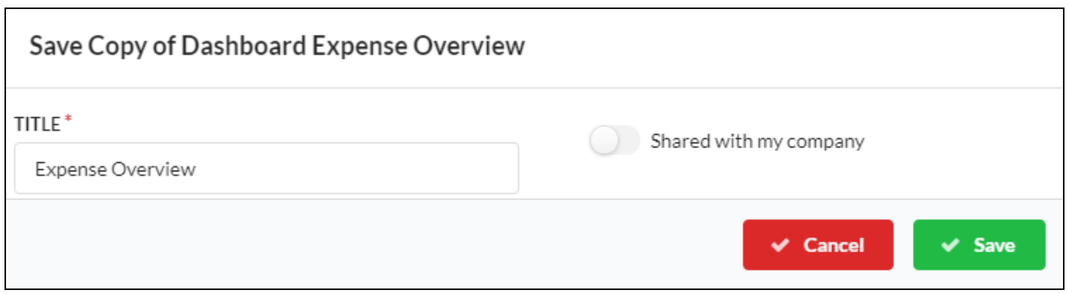
1. After making all of the desired modifications, click **Done Editing**.



You are returned to the previous page.

2. Click the down arrow to the right of **Save**.

3. Either:
   - Click **Save** to save the report using the existing name.
   – or –
   - Click **Save As**. The **Save Copy of...** window appears.



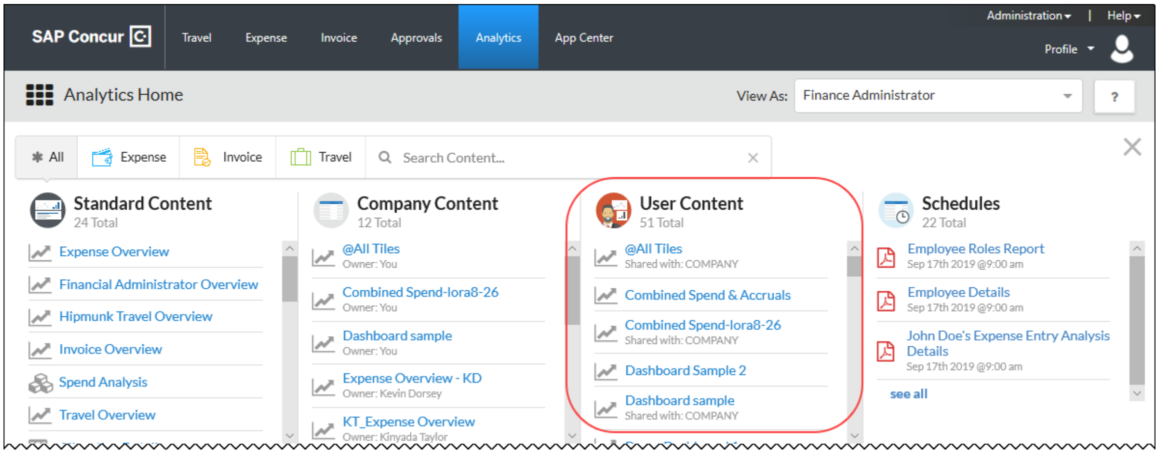
4. In the **Title** field, type the desired title.

5. In the **Description** field, make the appropriate changes (if applicable).

6. Click **Save**.

View a Custom Report

Once saved, your custom reports are available via the **User Content** section of the menu.

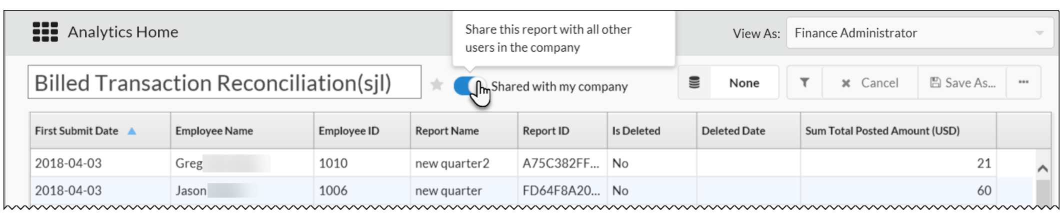


Share a Custom Report

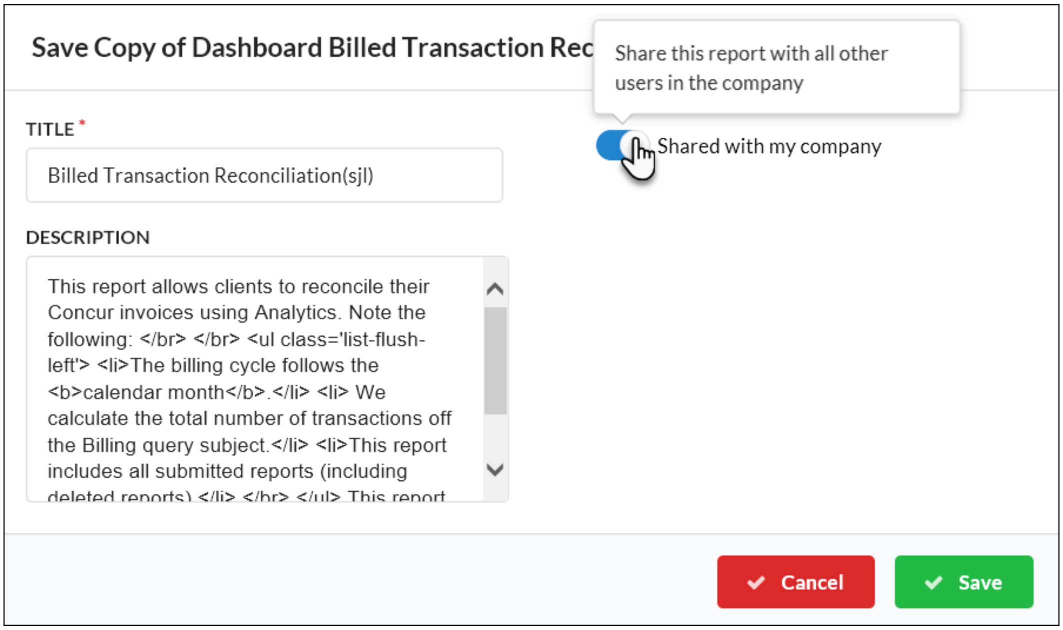
To share a custom report:

Either:

- Before saving the report, slide the **Shared with my company** option.



- While saving the report, slide the **Shared with my company** option.

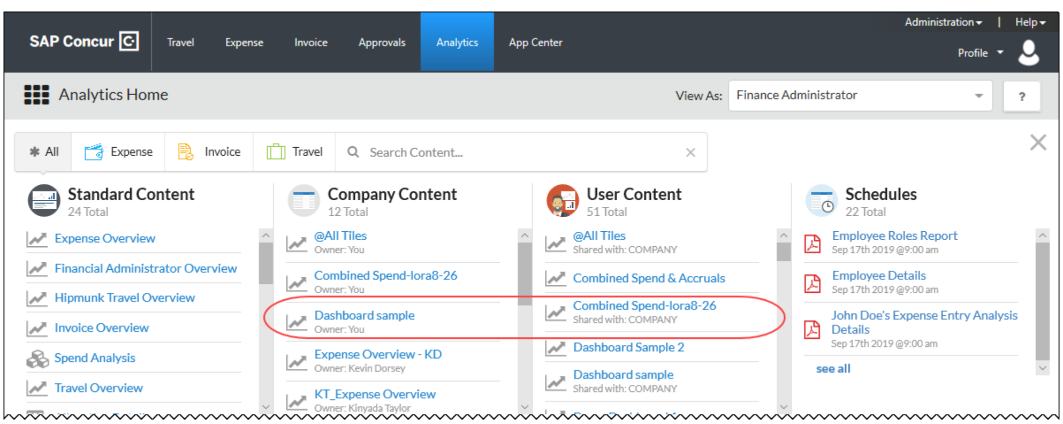


Once the report is saved, it appears in the main menu:

- In the **Company Content** section, showing the owner.

NOTE: In most cases, the owner's name appears. In certain cases, depending on the reporting structure in the company, *Another Owner* may appear instead. SAP Concur is planning to resolve this issue in a future release.

- In the **User Content** section, showing that it is shared with the company.



Modify the Shared Report

Only the owner of the custom report can modify it. The owner modifies the report as usual.

Once saved, the modified report is available to the company.

Discontinue Sharing

Only the owner of the custom report can discontinue sharing. To discontinue sharing, the owner uses the same steps for sharing and simply slides the **Shared with my company** option to the "off" position.

Once saved, the report is no longer available in the **Company Content** section of the main menu. In the **User Content** section of the main menu, it no longer shows as shared.

! **IMPORTANT:** Shared reports can be scheduled – by the owner or by anyone else in the company. If the shared report is scheduled and if the owner attempts to discontinue sharing, a message appears and provides the owner a list of users who have scheduled it. Each of those users must discontinue the schedule before the owner can discontinue sharing the report.

Delete the Shared Report

Only the owner of the custom report can delete it. The owner must first discontinue sharing and then can delete the report as usual.

Once deleted, the report is no longer available in the **Company Content** section or the **User Content** section of the main menu.

! **IMPORTANT:** Shared reports can be scheduled – by the owner or by anyone else in the company. If the shared report is scheduled and if the owner attempts to delete it, a message appears and provides the owner a list of users who have scheduled it. Each of those users must discontinue the schedule before the owner can delete the report.

Section 7: Reports – Scheduling (Analytics Only)

Essentials and Analytics

The Scheduling feature is available only to Analytics users.

Overview

The Scheduling feature allows you to email a filtered version of a report to selected users and selected intervals.

During the schedule process, you will identify the:

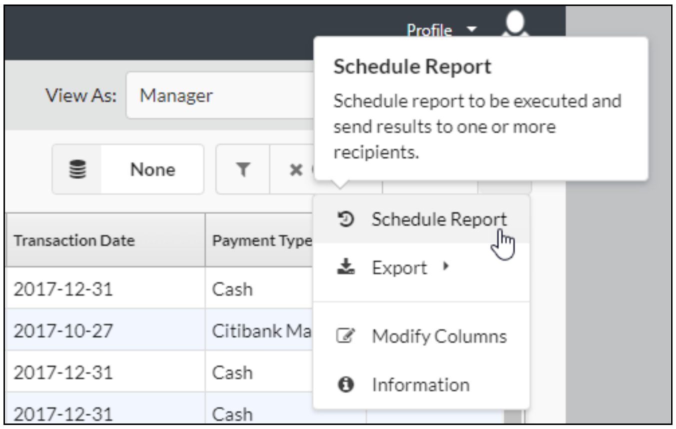
- Timing (now, daily, weekly, monthly)
- Recipients
- Data (the prompts used to generate the report)

Schedule a Report

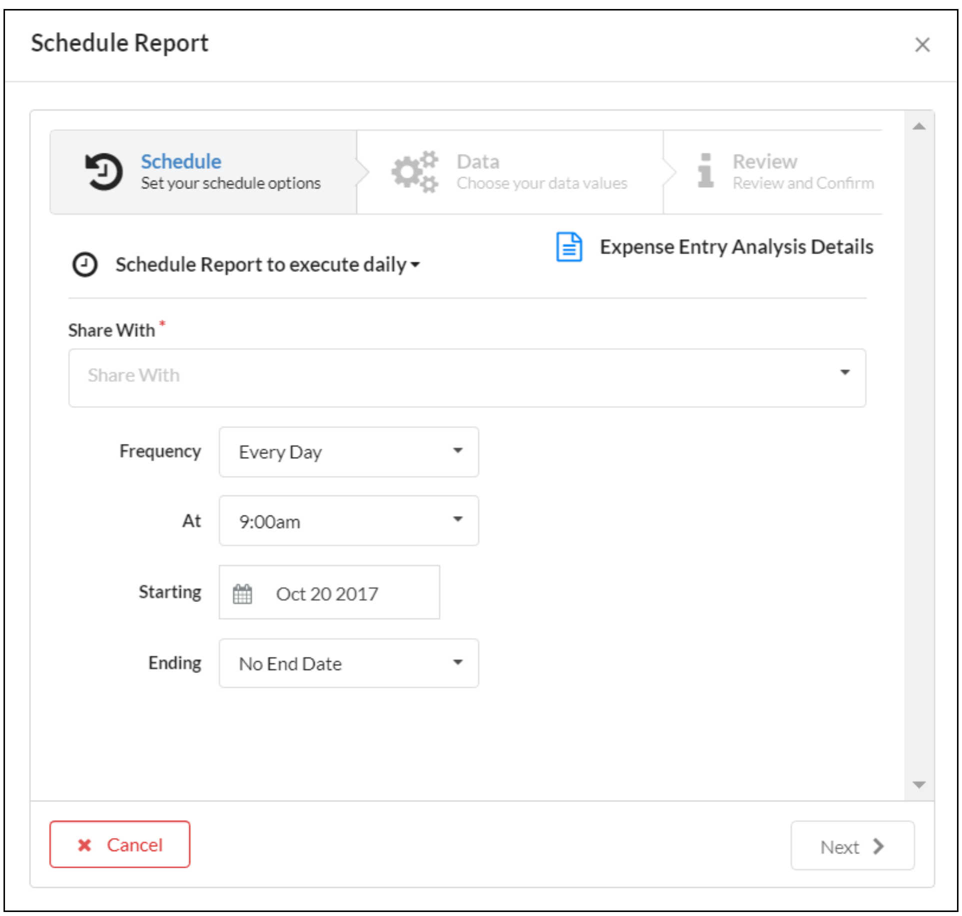
You can schedule a report from the report page but not from a report tile.

▸ *To schedule a report:*

1. With the desired report open, click the schedule icon in the upper-right corner of the page.



The **Schedule Report** window appears.



2. On the **Schedule** tab, in the **Schedule Report to execute** field, select the desired frequency. When you do, the date/time fields below change accordingly.

Schedule Report to execute	Date/Time fields
Now	No options - the report runs now
Every Day	**Frequency:** Select one of these: • Every Day • Every Weekday **At:** Select the time (based on the time zone of the sender). **Starting:** Select the starting date. **Ending:** Select the ending date, if any.
Every Week	**Frequency:** Select one of these: • Every Week • Every 2 Weeks **On:** Select the day of the week. **At:** Select the time (based on the time zone of the sender). **Starting:** Select the starting date. **Ending:** Select the ending date, if any.
Every Month	**Frequency:** Select one of these: • First Day of the Month • Last Day of the Month • Day of the Month Specified **At:** Select the time (based on the time zone of the sender). **Starting:** Select the starting date. **Ending:** Select the ending date, if any.

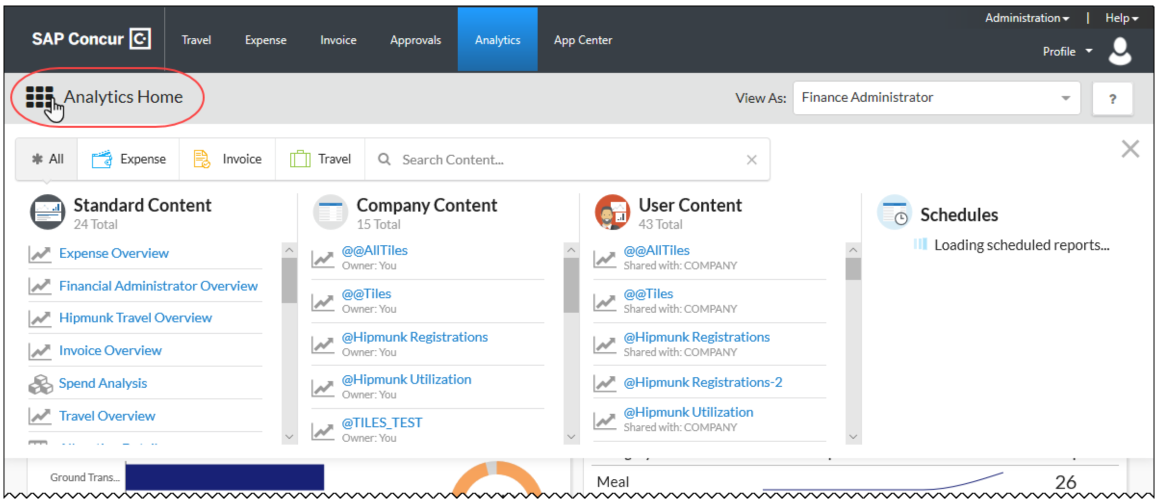
3. In the **Send to** field, select the desired recipients.
   - To filter the list, start typing a desired recipient's name.
   - To add a recipient who is not already in the list, start typing the recipient's name.
4. When done, click **Next**.
5. In the **Data** tab, define the prompts to run the report. The prompts that appear here differ by report.

   In date fields, you can:
   - Select from predefined ranges, like *Month to Date*, *Last Month*, etc.
     – or –
   - Click **Choose custom range** and define a range.
6. When done, click **Next**.

7. On the **Review** tab:
   - Review the information for accuracy.
   - Select the output format of Excel or PDF.
8. When done, click **Confirm**.

View a Scheduled Report

Once confirmed, your scheduled reports are available via the **Schedules** section of the menu.

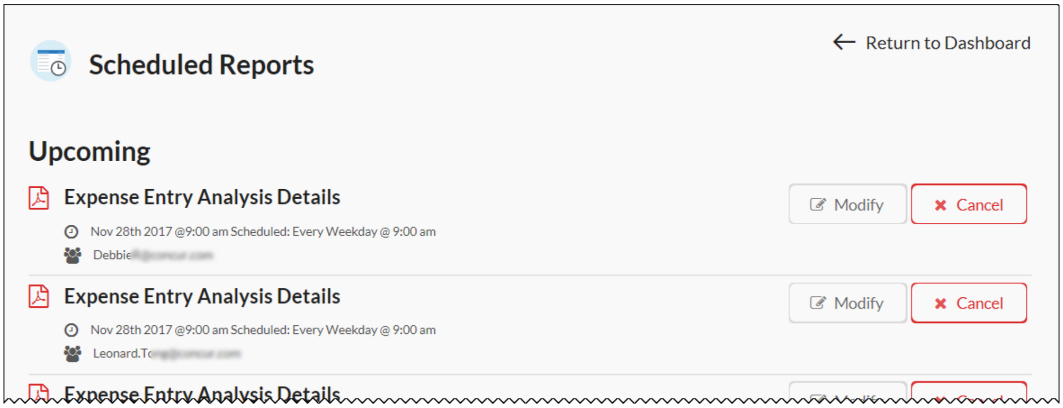


On the menu itself, the next three upcoming scheduled reports appear. To see more scheduled reports, click **see all**.

Modify or Cancel a Scheduled Report

To modify or cancel a scheduled report:

1. Click the menu icon in the upper-left corner of the page. The menu slides down.
2. In the **Schedules** section, click **see all**. The **Scheduled Report** page appears.

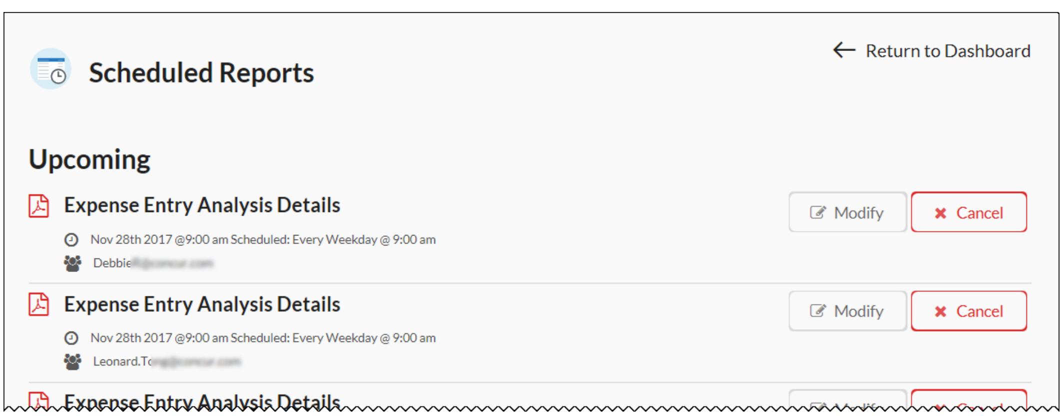


3. Then, in the **Upcoming** section of the page:
   - To modify a report:
     - Click **Modify**.
     - Make the desired changes.
     - When done, click **Confirm**.
   - To cancel a report, click **Cancel**.
4. When done, click **Return to Dashboard**.

Review Scheduled Report History

To review the history of a scheduled report:

1. Click the menu icon in the upper-left corner of the page. The menu slides down.
2. In the **Schedules** section, click **see all**. The **Scheduled Report** page appears.



3. Scroll down to the **History** section of the page.

4. Review the information.

5. When done, click **Return to Dashboard**.

Section 8: Actionable Analytics

Essentials and Analytics

Actionable Analytics emails are available to Essential and Analytics users as described in the following section.

Overview

Actionable Analytics includes a set of notifications that are delivered to managers via email. The information is embedded in the email – not sent as attachments – for quick access and easy review.

There are several actionable analytics notifications:

Notification	Description	Available to
Spend Summary	This notification is sent either every two weeks or monthly – as specified by the administrator – and compares the current quarter actual Expense spend to the prior quarter actual spend.	Essentials Analytics
Spend Management	A notification is sent when total spend – which is the actual spend ***plus*** accrual – for the current calendar quarter equals or exceeds a specified percentage of the manager-specified threshold (but is less than the threshold amount). A notification is sent when total spend exceeds the manager-specified threshold.	Analytics
Credit Card Spend	A notification is sent when spend on a credit card transaction exceeds or equals the manager-specified threshold.	Analytics

Configuration for Actionable Analytics

There are two parts to the configuration process for the client:

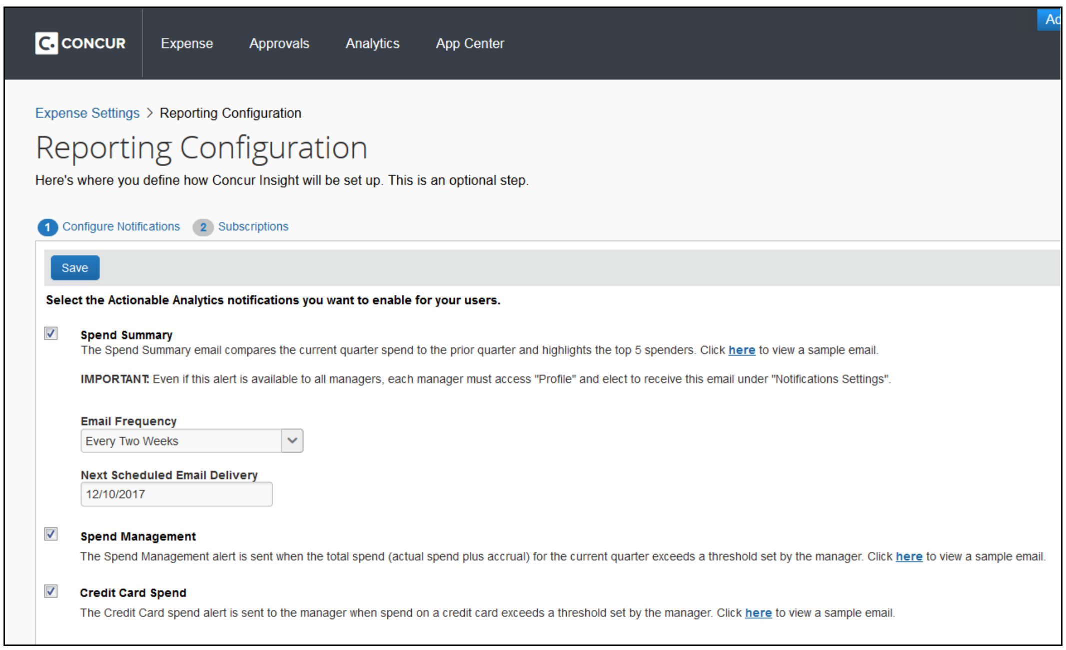
- The admin defines the Actionable Analytics options for the entire company.
- In Profile, each manager opts in to the desired email and enters any percentages and amounts as appropriate.

Admin – Enable Actionable Analytics

The admin follows these steps to enable the desired Actionable Analytics for the entire company.

To enable Actionable Analytics:

1. Click **Administration > Expense Settings**.
2. On the **Monitoring Spend** tile, click **Show 1 Advanced Setting**. The tile expands.
3. Click **Reporting**. The **Reporting Configuration** page appears.



4. Make the appropriate choices as defined below.

! **IMPORTANT:** In all cases, even though you have selected the notification for the company, each manager ***must*** opt in to each notification in Profile.

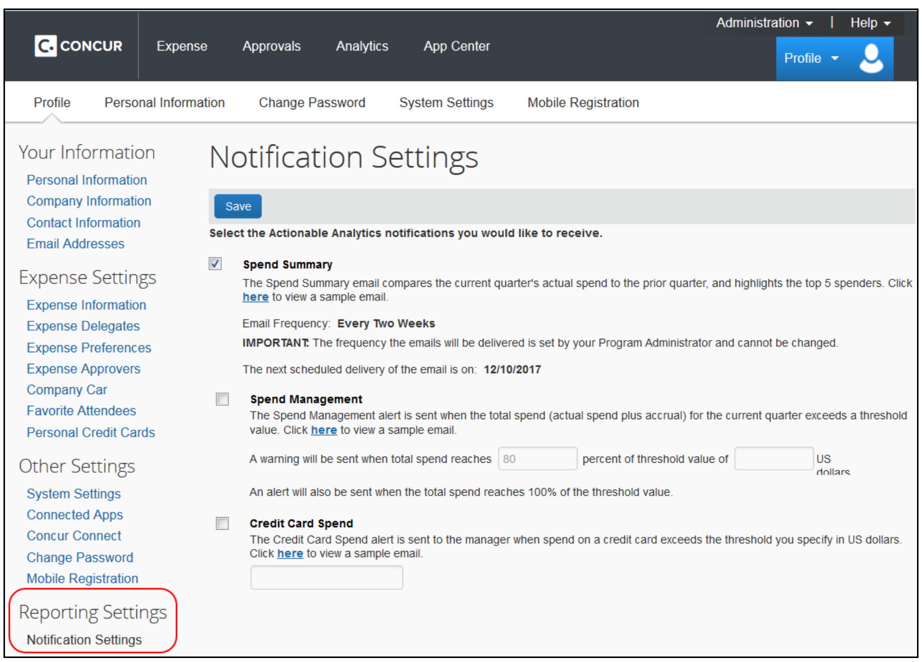
Notification	Description
Spend Summary	To use: 1. Select the check box to enable the notification. 2. In the **Email Frequency** list, select one of these: ♦ Every two weeks ♦ Once a month **NOTE:** The manager cannot change this frequency. The **Next Scheduled Email Delivery** field displays the next delivery date.

Notification	Description
Spend Management	*This option appears only for clients with Analytics.* Select the check box to enable the alert. **NOTE:** If you clear the check box, the alerts stop for the entire company – even if a manager opted in while the alert was enabled.
Credit Card Spend	*This option appears only for clients with Analytics.* Select the check box to enable the alert. **NOTE:** If you clear the check box, the alerts stop for entire company – even if a manager opted in while the alert was enabled.

Manager – Enable in Profile

In Profile, each manager follows these steps to opt in to any of the Actionable Analytics that have been enabled for the entire company.

The manager clicks **Profile > Profile Settings > Notification Settings** (in the **Reporting Settings** section of the left menu).



The manager makes the desired choices.

Notification	Description
Spend Summary	The manager selects the check box to enable the notification.

Notification	Description
Spend Management	*This option appears only for clients with Analytics.* The manager: 1. Selects the check box to enable the alert 2. Enters the desired percentage of the threshold amount 3. Enters the desired threshold amount
Credit Card Spend	*This option appears only for clients with Analytics.* The manager: 1. Selects the check box to enable the alert 2. Enters the desired threshold amount

Actionable Analytics – Descriptions

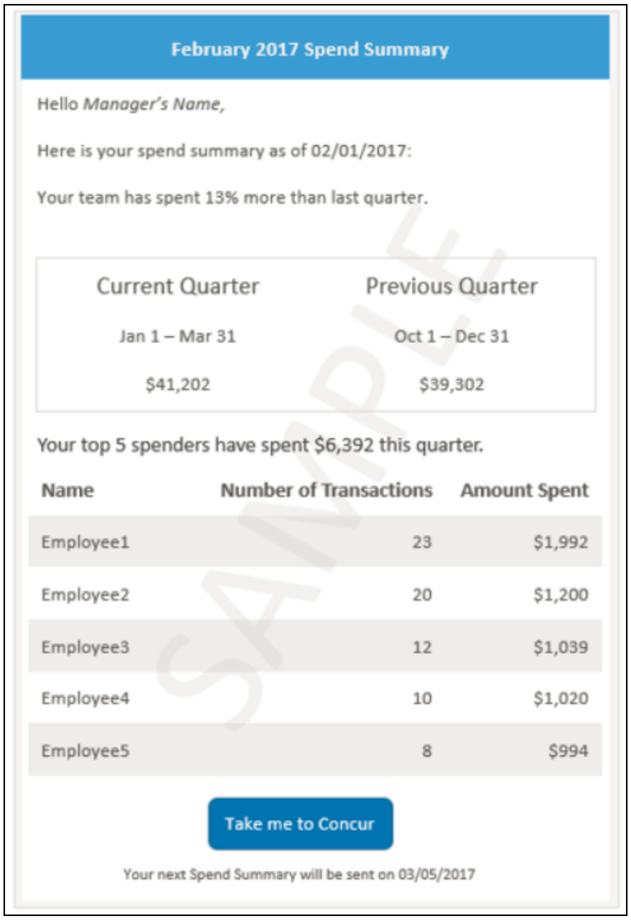
Email: Spend Summary

ESSENTIALS AND ANALYTICS

This notification is available to Essentials and Analytics users.

DESCRIPTION

This notification is sent either every two weeks or monthly as specified by the administrator and compares the current quarter actual Expense spend (expense reports sent for payment) to the prior quarter actual spend and lists the top five spenders.



February 2017 Spend Summary

Hello *Manager's Name*,

Here is your spend summary as of 02/01/2017:

Your team has spent 13% more than last quarter.

Current Quarter	Previous Quarter
Jan 1 – Mar 31	Oct 1 – Dec 31
$41,202	$39,302

Your top 5 spenders have spent $6,392 this quarter.

Name	Number of Transactions	Amount Spent
Employee1	23	$1,992
Employee2	20	$1,200
Employee3	12	$1,039
Employee4	10	$1,020
Employee5	8	$994

Take me to Concur

Your next Spend Summary will be sent on 03/05/2017

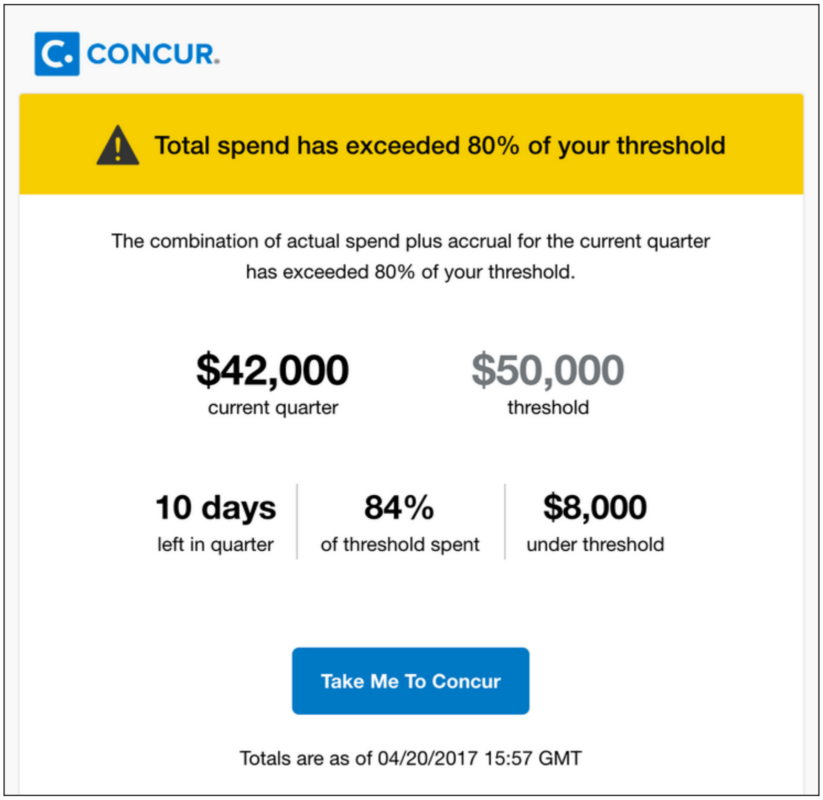
Email: Spend Management: Fixed Threshold Amount

Essentials and Analytics

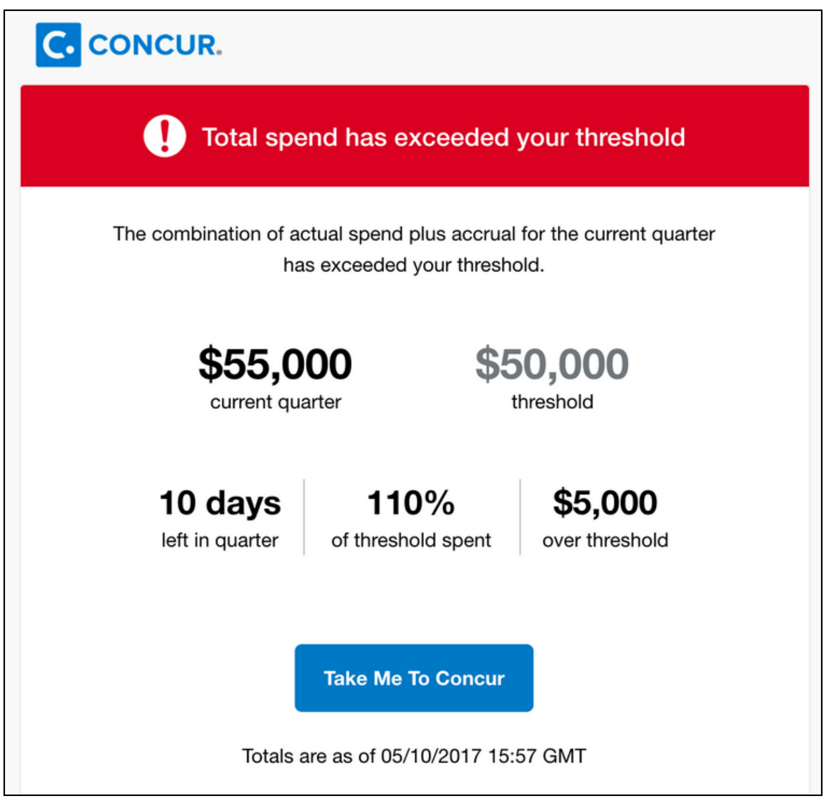
This notification is available only to Analytics users.

Description

This notification is sent when total spend – which is the actual spend ***plus*** accrual – for the current calendar quarter equals or exceeds a specified percentage of the manager-specified threshold (but is less than the threshold amount).



This notification is sent when total spend exceeds the manager-specified threshold.



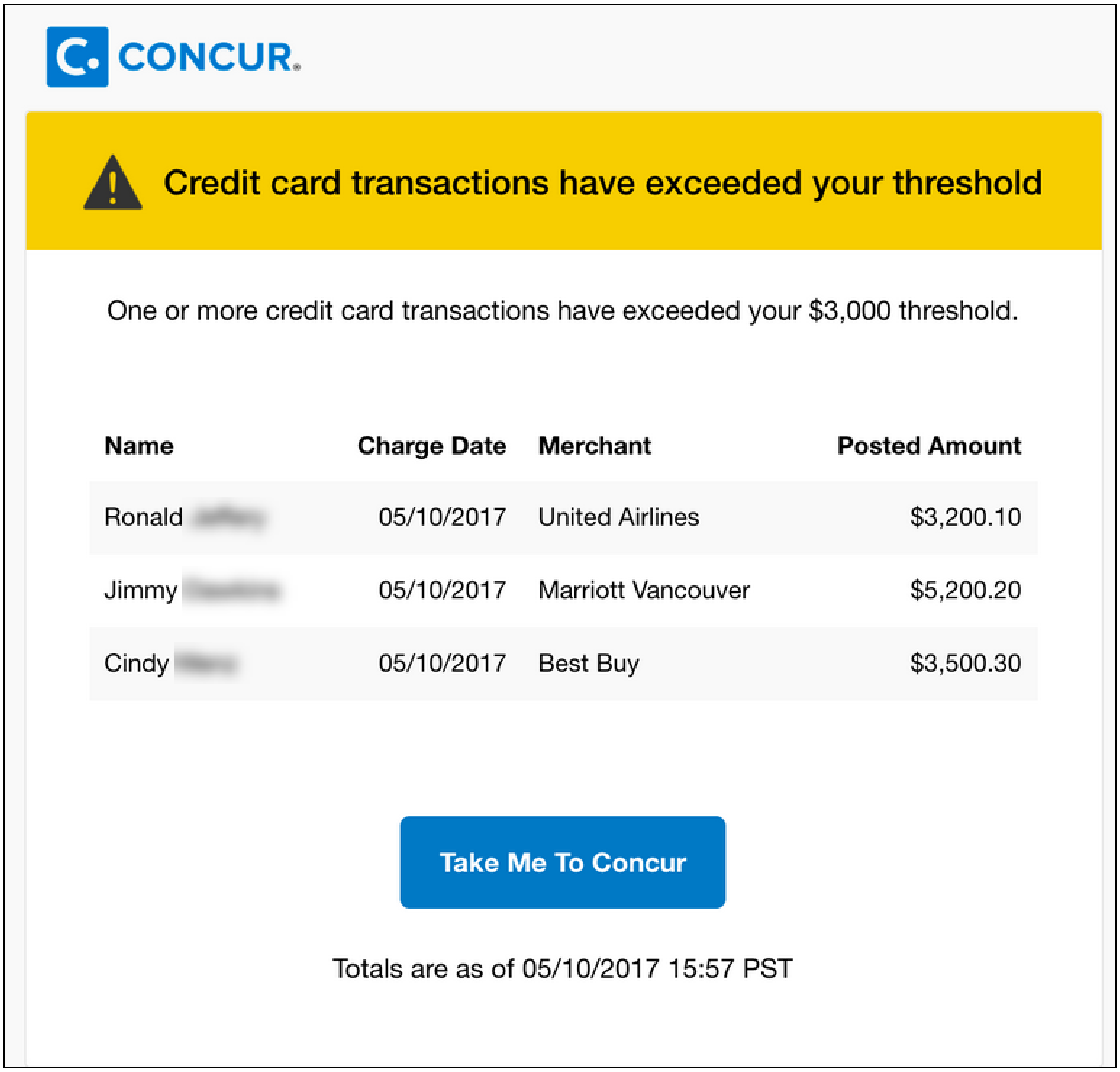
Email: Credit Card Spend Threshold

Essentials and Analytics

This notification is available only to Analytics users.

Description

This notification is sent when spend on a credit card transaction exceeds or equals the manager-specified threshold.


CONCUR

Credit card transactions have exceeded your threshold

One or more credit card transactions have exceeded your $3,000 threshold.

Name	Charge Date	Merchant	Posted Amount
Ronald	05/10/2017	United Airlines	$3,200.10
Jimmy	05/10/2017	Marriott Vancouver	$5,200.20
Cindy	05/10/2017	Best Buy	$3,500.30

Take Me To Concur

Totals are as of 05/10/2017 15:57 PST