

Analytics Essentials by SAP Concur QuickStart Guide



Concur Technologies

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Introduction to Analytics

Analytics is the new reporting platform designed specifically for our small, medium-sized customers operating on SAP Concur's Standard platform. The Analytics portfolio consists of two product offerings:

- **Analytics Essentials:** Free version available to all SAP Concur customers who purchase core products of Expense, Invoice and Travel. Customers who are on Analytics Essentials are not able to edit or modify any of the out-of-the-box reports or dashboards. Functionality is limited to read only. This guide covers the features of Analytics Essentials only.
- **Analytics:** This is the buy-up version to Analytics Essentials that offers additional functionality not available with Analytics Essentials. These additional features include: editing and saving reports and dashboard views, scheduling reports for delivery, and sharing content with the rest of the company. Please visit: <https://www.concurtraining.com/en-us/standard/analytics> to find the Analytics Quick Start Guide.

The main differences between the new Analytics platform and the Cognos Analysis/Intelligence reporting platforms are:

- Analytics is built into Concur Travel & Expense (CT&E) There is no longer a separate application that opens as it does today with Analysis and Intelligence.
- The Analytics platform does not use licensed roles, which means there is not a limitation on how many users can access the new Analytics platform. There are two roles available in the new Analytics platform -- Manager and Financial Administrator. Data for Managers is limited to only their direct and indirect reports. Financial Administrators have full access to the analytical data. Users are still assigned roles; however, they are not licensed roles. The Analytics roles are assigned in the Reporting Access section of Expense Administration.
- Users have access to near real-time data in the Analytics platform. There will no longer be a one-day delay to see new data entered into Concur Travel and Expense. The new Analytics data refreshes every 15 minutes, allowing for near real-time information.

Although there are two Analytical offerings, throughout this course the term Analytics is used to denote the entire offering. Differences in the two Analytical options will be pointed out within this course.

Quick Start Guide

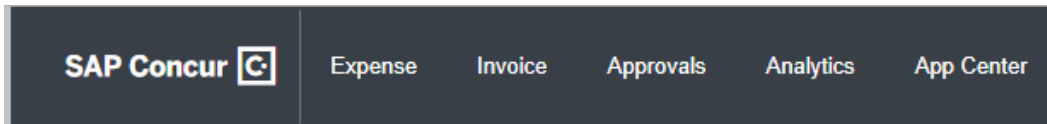
This guide is a Quick Start Guide intended to point out the basic features and functionalities of Analytics Essentials without going into detail. The intent of this guide is to quickly familiarize you with how the Analytics platform tool works and to step you through some of its basic features. More details are available on our training toolkit. For more information, visit:

<http://www.concurtraining.com/standard/analytics>.

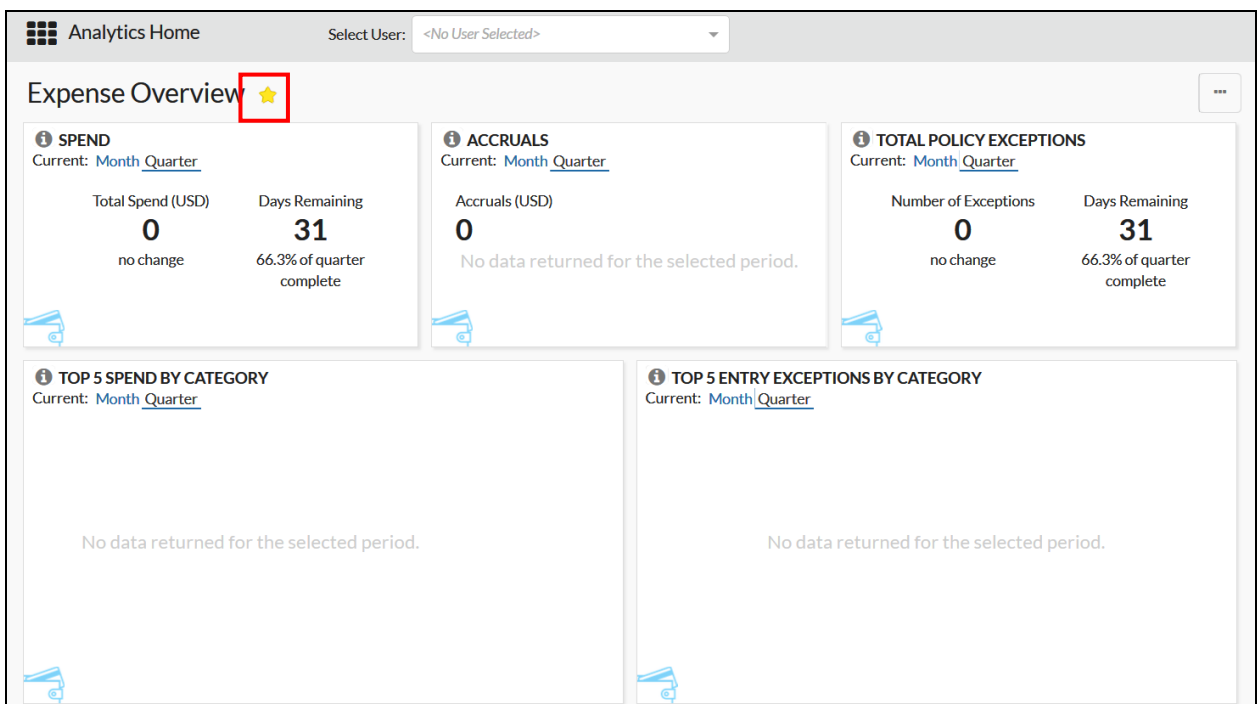
Accessing Analytics

To access the Analytics tool:

1. Log in to your Concur account.
2. At the top of the Concur home page, on the menu bar, click **Analytics**.



Note: The first time you access Analytics, the Expense Overview dashboard is the default view as denoted by the gold star to the right of the name of the dashboard. You can change your default view by clicking the star next to any report or dashboard. Once you click the star it changes color to gold and becomes your default view for Analytics.



Changing Dashboard Views

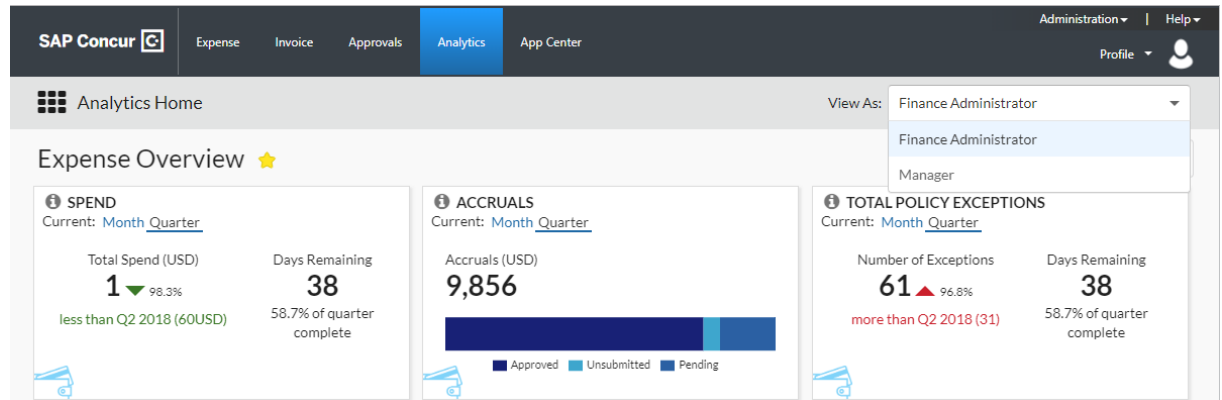
Analytics provides two role-based dashboard views:

- Manager view - Allows Approvers/Managers a view of data for themselves, and their direct and indirect reports.
- Financial Administrator view - Provides a global view of data for the entire organization.

To change the dashboard view:

1. Click the **View As** dropdown arrow.


2. Select either **Financial Administrator** or **Manager**.

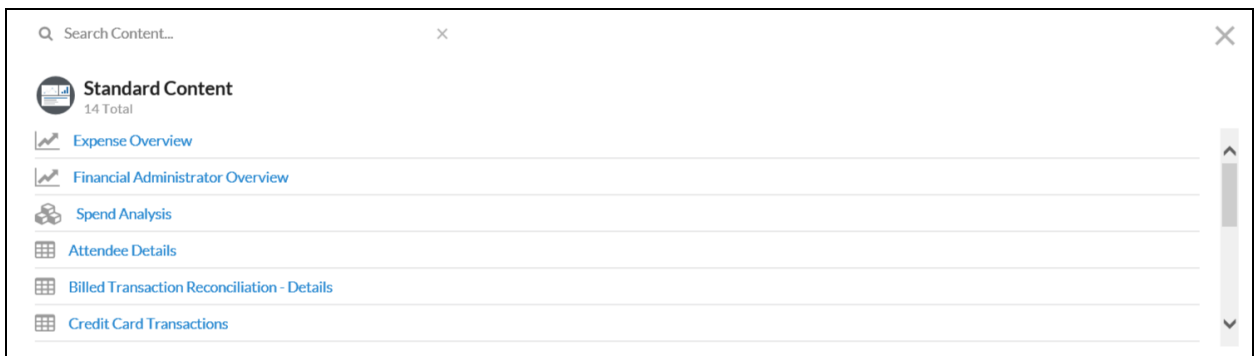


Viewing Standard Dashboards

Analytics provides three Standard dashboards: Expense Overview, Financial Administrator Overview and Spend Analysis. You can easily access each dashboard from the Standard Content section in the **Analytics Home** menu.

To view the Standard dashboards:

1. Click the **Analytics Home** icon .
2. In the Standard Content section, select the Standard dashboard that you want to view.



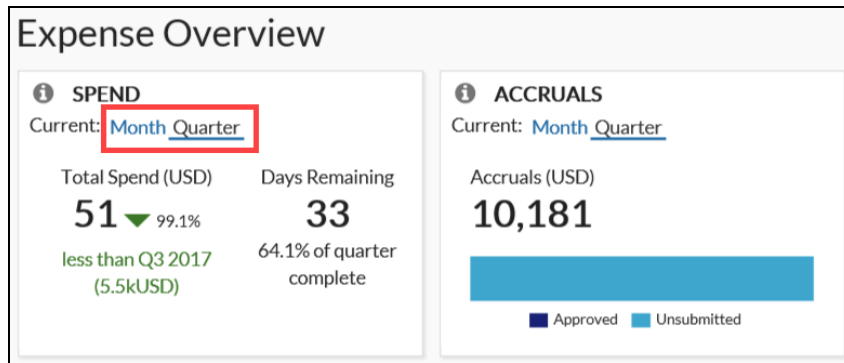
Filtering Standard Dashboard Data

The Expense Overview and Financial Administrator Overview dashboards display common key performance indicators (KPIs). Each KPI is stored in its own tile or section. You can filter each of these KPIs by current month and current quarter.

To filter the dashboard:

1. From the **Analytics** Home screen, select the Standard dashboard that you want to view.
2. Once the dashboard displays, below the tile name, click **Month**. This will change the data to display for the current month only.


Note: The default view for the Standard dashboards displays data by current quarter. You can toggle between current month and quarter.



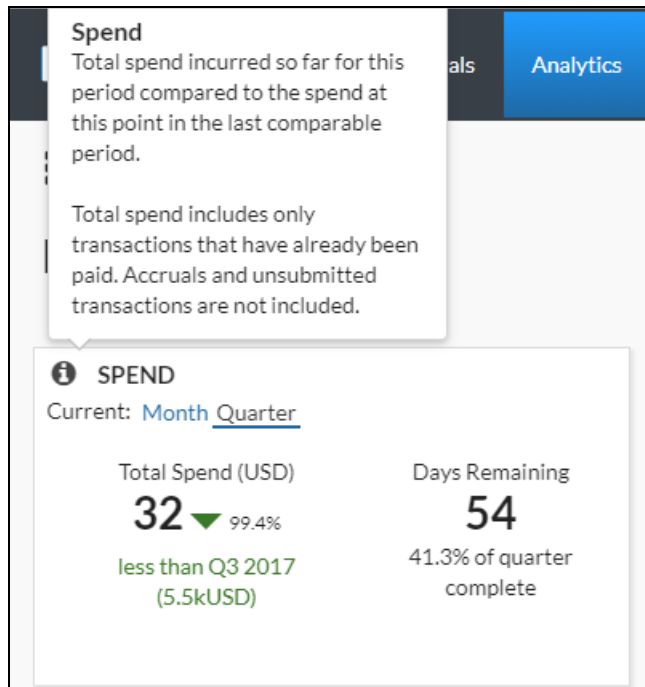
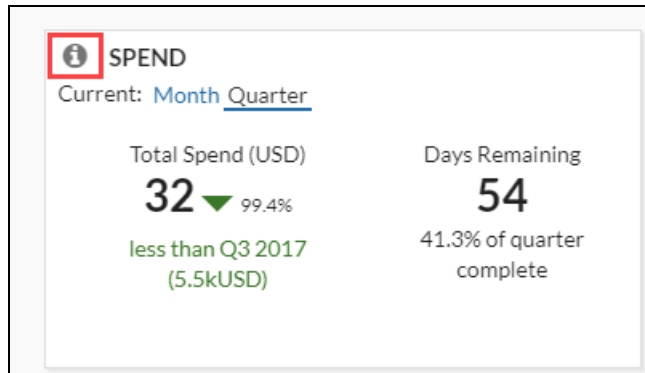
Viewing Tile Information

Analytics dashboards and reports are displayed in tiles. Tiles are basically a holding area for the data. To assist you in understanding what the dashboard KPI or report is displaying, there is an Information tool tip added to each tile. The tool tip gives a brief description of the KPI or the tile.

To view the tool tip for a tile:

1. Open the dashboard or report that you want to view.
2. In the upper left-hand corner of the tile, place your mouse pointer over the tool tip icon .


A window with a brief description of the KPI or report displays.

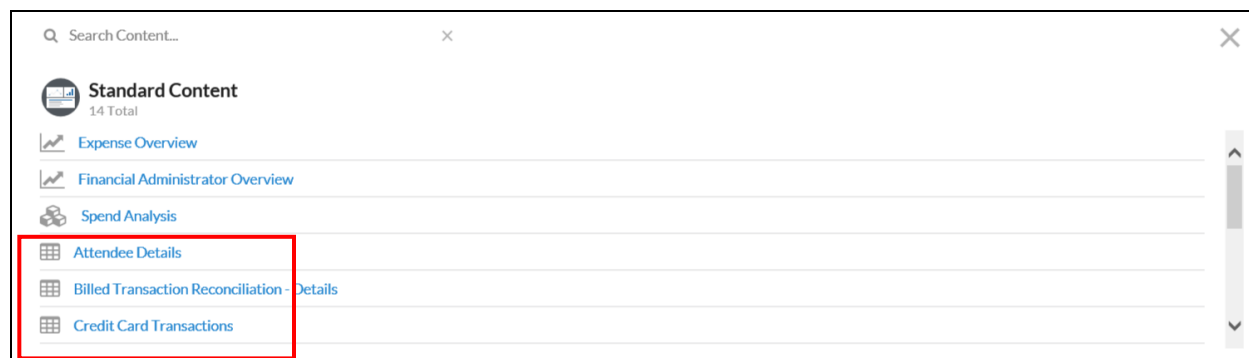


Viewing Standard Reports

Analytics provides several pre-built reports called Standard Reports. These reports are designed to provide insight into the most common and widely used reporting data items. These Standard Reports provide an easy way to view near real-time company information.

To view a Standard Report:



1. Click the **Analytics Home** icon .
2. From the **Analytics Home** screen, in the **Standard Content** section, click the Standard Report name you want to view.
3. The report displays in the main view area of your screen.



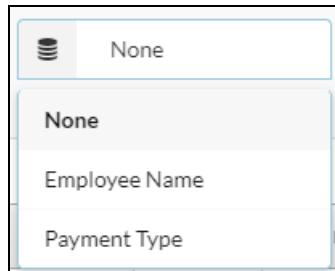
Grouping Standard Report Data

Analytics allows you to group your data to provide a clearer view of the data and assist you in understanding spend in different ways. For example, you might want to see spend by Employee or by Expense Type. Grouping gives you this flexibility. By default, Standard Reports do not have any grouping applied to them. The Standard Reports each have certain grouping options you can choose. The grouping options you see for a report are only those that are applicable to the data you are viewing.

To group a report:

1. To select the report you want to view, click the **Analytics Home** icon .
2. From the Standard Content list, click the report name that you want to view.
3. After the report displays, click the **Group** icon  located below the **View As:** field.
4. Select the appropriate group option from the dropdown list. Your report will be grouped accordingly.

Note: The grouping options vary from report to report.


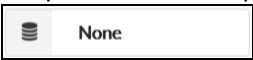
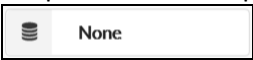


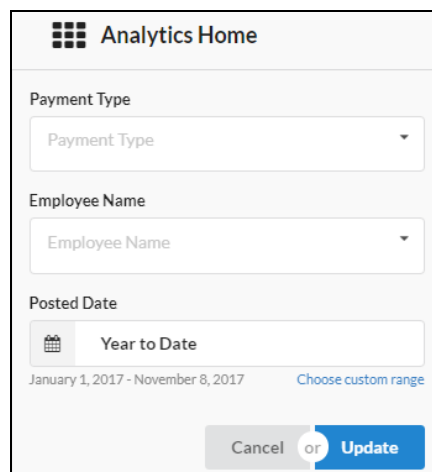
Filtering Standard Report Data

By default, Standard Reports give you a comprehensive view of the data based on your Analytic role. If you have the Financial Administrator role, you will see comprehensive company-wide data. If you have the Manager role, you will see comprehensive data based on your direct and indirect reports. Therefore, there are no parameters applied to the data to narrow it down to be more concise and relevant to your reporting needs. Analytics allows you to apply filters to your reports to give you a more exact view of your data. The Standard Reports have pre-built filters provided as options for working with your data. You can filter the reports using one or all the pre-built filters. For example, one of the most commonly used report filters is “date range.”

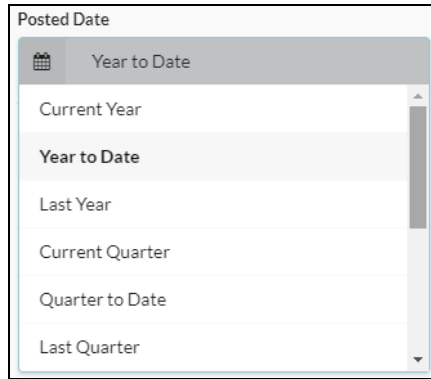
Note: Reports that have pre-built date filters default to the **Year to Date** filter. All other Standard Reports that do not use date filters still have other types of filters you can use, but do not have any filter applied by default.

To filter a Standard Report:

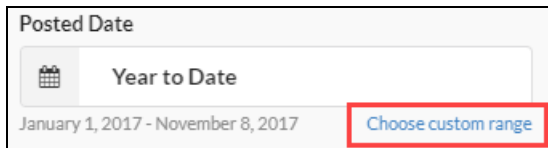
1. In an open Standard Report, click the **Filter** icon  located to the right of the **Group**  **By**  field. A filter window displays on the left-hand side of the screen.
2. The filter window displays all pre-built filter options. Click the field or dropdown arrow for the filter you want to use.
3. Select the appropriate filter option from the list located to the left of the displayed report data.
4. Click **Update**.



The screenshot shows the 'Analytics Home' interface with a filter window open. The window has three sections: 'Payment Type' with a dropdown menu, 'Employee Name' with a dropdown menu, and 'Posted Date' with a date range selector. The 'Posted Date' section is currently set to 'Year to Date' with a date range of 'January 1, 2017 - November 8, 2017' and a link to 'Choose custom range'. At the bottom of the window are 'Cancel' and 'Update' buttons.




Note: Date filters have pre-defined options, however, you also can enter a custom date range.

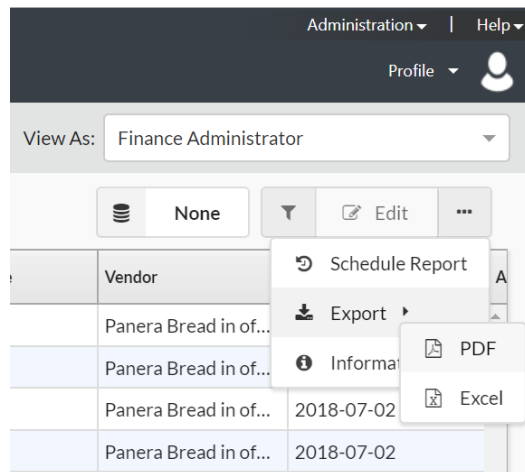


Exporting Reports

You can export reports to either PDF format or Excel. This feature allows you to save copies of the report locally to your computer or to a shared drive for others to view. Exporting reports also gives you the ability to manually manipulate the report using either Adobe Acrobat or Excel.

To export a report:

1. In an open report, place your mouse pointer over the **More**  icon located below the **View As:** field. Select Export from the dropdown list. Two options display: -- PDF and Excel.



A pop-up message appears stating the report has been saved to your Download folder.

Note: Files save differently to various browsers, but there is usually a progress indicator or easy way to view recent downloads. The screenshot below was taken from Google Chrome.

