

Optimize SAP Concur Reporting

Use reports to track your business metrics



Purpose: Review these recommended reports and decide which you'll use to track your progress. Locate the reports in [SAP Concur's reporting catalog](#) by finding the report name within the appropriate folder, as listed below.

Train: [Access reporting guides and training](#) on SAP Concur's reporting tools.

Report Folder	Report Name	Why Measure It? (Value to my organization)	What Should I Be Looking For?	How to Improve
Accrual	Expense Accrual by Date Range	Shows all transactions that have not been assigned to an expense report or have been assigned to an expense report that has not yet been paid.	<ul style="list-style-type: none"> Determine if there are outstanding liabilities and potential future cash requirements 	<ul style="list-style-type: none"> Policy: Have you set up e-mail reminders for any unsubmitted transactions? Are employees expensing in a timely manner? Are managers approving in a timely manner? What changes can you make to your policy to get fewer outstanding expenses?
Administrative	Billed Transaction Reconciliation	Allows you to review how many expense reports have been submitted as well as who submitted them.	<ul style="list-style-type: none"> Review the total amount of expense report submissions Determine how many expense reports each employee is submitting 	<ul style="list-style-type: none"> Do you have seasonal trends in expense report submissions? Are your employees following your expense reporting submission policy?
Expense Processing	Workflow Cycle Time Details (Intelligence only)	Enables you to monitor how long it takes an expense report to move through the major workflow steps.	<ul style="list-style-type: none"> Review the average number of days for submission and approval each month. These numbers should decrease after you first roll out SAP Concur to your users. The report is run off the prompt "Sent for Payment Date." 	<ul style="list-style-type: none"> If you're challenged with approval time frames, you can run the report "Top 10 Longest to Approve – Prompts" to see the top offenders.

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Expense Processing	Reports Approved But Receipts Not Viewed	<p>Provides a list of approvers who are not looking at receipts, at both the report and entry level, as part of the approval process.</p> <p>Report details and FAQ</p>	<ul style="list-style-type: none"> • Ensure receipts are being reviewed • Ensure managers understand how to approve reports properly 	<ul style="list-style-type: none"> • Reach out to the approvers to educate them on the importance of receipt review • Edit current internal audit to include expenses from those who most consistently do not view receipts • Ensure exceptions are on reports and require approvers to accept
Expense Processing	Expense Entry Analysis Grouped by Expense Type/ Employee	<p>Offers detailed spending information grouped by employee or expense type.</p>	<ul style="list-style-type: none"> • Evaluate where money is being spent • Leverage data for negotiating discounts with vendors • Determine if expenses have risk or potential leakage • Assist with budgeting • Identify areas where spend can be reduced or removed 	<ul style="list-style-type: none"> • Are you capturing all necessary data? • Have you identified Value vs Non-Value expense types? • Is spend in appropriate expense types?