The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Questions

- How do I make sure virtual employees are taking care of expenses in a timely manner?
- How can I better understand how the recent changes have impacted employees' perceptions of the solution?
- How can I better manage the new trends in spend with all of the recent workforce changes?

Spend Control Concerns

- How can I better understand spending behavior?
- Are my employees using payment methods effectively?
- How do I analyze broader categories of spend within the organization?

Compliance Issues

- How can I manage policy violations?
- Are approvers reviewing receipts when approving expense reports?
- How can I share data across my organization?

Customization Queries

- How do I know which reports are best for me?
- Where can I find my custom fields?
- How can I find out how to manage my own reports?

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Qu

How do I make su virtual employee taking care of ex in a timely mann

How can I better how the recent c have impacted e perceptions of th

How can I better the new trends i with all of the rec workforce changes

zation Queries

do I know which rts are best for me?

re can I find my om fields?

can I find out to manage my reports?

How do I make sure virtual employees are taking care of expenses in a timely manner?

Hack: Utilize workflow reporting to see what's working and what's not.

Standard Reports Folder > Expense Processing Folder

Next Steps:

- Go straight to the bottlenecks with reports that identify the impact of delays.
- Offer ways to improve the workflow (i.e.: Utilizing Concur Mobile, Policy adjustment, etc.).

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

How can I better understand how the recent changes have impacted employees' perceptions of the solution?

Hack: Review user rating surveys to see how employees feel about the solution.

Standard Reports Folder > Administration Folder > User Rating Summary – Expense

Next Steps:

- Use the insight you've gained to zero in on what drives user satisfaction with Concur Expense.
- Consider promoting mobile tools for expense submissions.
- Look at possible policy adjustments to address concerns and create a better user experience – such as reducing the number of expenses to simplify selection.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Qu

How do I make s
virtual employee
taking care of ex
in a timely mann

How can I better
how the recent c
have impacted e
perceptions of t

How can I better
the new trends i
with all of the re
workforce changes?

zation Queries

do I know which
rts are best for me?

re can I find my
om fields?

can I find out
to manage my
reports?

How can I better manage the new trends in spend with all of the recent workforce changes?

Hack: Use Concur Intelligence to give more employees more insight.

Next Steps:

- Run the Employee Details report to determine how BI Managers are currently set up in your company.
- Define BI Manager in the employee's profile. The Professional edition offers the flexibility to set your BI Manager however it works best. In the Standard edition, the BI Manager is the same as the Default Approver.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Questions | Spend Control Concerns | Compliance Issues | Customization Queries

How do I make s
virtual employee
taking care of ex
in a timely mann

How can I better
how the recent c
have impacted e
perceptions of th

How can I better
the new trends i
with all of the recent
workforce changes?

organization?

do I know which
rts are best for me?

re can I find my
om fields?

can I find out
to manage my
reports?

How can I better understand spending behavior?

Hack: Run the Expense Entry Analysis report.

Standard Reports Folder> Expense Processing Folder

Next Steps:

- Utilize the prompt page to focus on a specific time period or filter specific expense types.
- Analyze the data based on the specific spending targets for your organization.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Qu

How do I make s
virtual employee
taking care of ex
in a timely mann

How can I better
how the recent c
have impacted e
perceptions of th

How can I better
the new trends i
with all of the re
workforce changes?

zation Queries

do I know which
rts are best for me?

re can I find my
om fields?

can I find out
to manage my
reports?

Are my employees using payment methods effectively?

Hack: See payment type patterns by running a Payment Type Analysis.

Standard Reports Folder > Expense Processing Folder > Payment Type Analysis

Next Steps:

- Identify specific users or initiatives that may require additional training.
- Single out top cash spenders without a corporate card – then target those employees to drive more compliant spend across your card program.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Qu

How do I make s
virtual employee
taking care of ex
in a timely mann

How can I better
how the recent c
have impacted e
perceptions of th

How can I better
the new trends i
with all of the re
workforce changes?

zation Queries

do I know which
rts are best for me?

re can I find my
om fields?

can I find out
to manage my
reports?

How do I analyze broader categories of spend within the organization?

Hack: Map multiple expense types to a smaller set of well-accepted, recognized spend categories.

Next Steps:

- Carefully evaluate the mapping – considering which spend category is best for each expense type – as incorrect mapping results in inaccurate reporting.
- Avoid overuse of the “other” category. Do not use it as the default category, and do not use it for expense types critical to your organization.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Qu

How do I make s
virtual employee
taking care of ex
in a timely mann

How can I better
how the recent c
have impacted e
perceptions of th

How can I better
the new trends in
with all of the re
workforce chang

How can I manage policy violations?

Hack: Use the Top Exception Violators report.

Standard Reports Folder > Compliance Folder

Next Steps:

- Review reports on a frequent basis to identify shifts in behavior and mitigate potential risks.
- When communicating with policy violators, remember that they're dealing with rapid changes in their daily work. Offer them the training, resources, and data to help minimize their frustration.
- Identify triggers and enhance policy training to minimize exceptions.
- Review configuration to ensure audit rules and exceptions are set up appropriately.

zation Queries

do I know which
rts are best for me?

re can I find my
om fields?

can I find out
to manage my
reports?

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Questions | **Spend Control Concerns** | **Compliance Issues** | **Customization Queries**

How do I make s virtual employee taking care of ex in a timely mann

How can I better how the recent c have impacted e perceptions of th

How can I better the new trends i with all of the recent workforce changes?

do I know which rts are best for me?

re can I find my om fields?

can I find out to manage my reports?

Are approvers reviewing receipts when approving expense reports?

Hack: Run the Reports Approved by Receipts Not Viewed in the Standard Reports folder.

Next Steps:

- Use report insights to identify approvers who have not reviewed receipts.
- Deliver targeted education on company policy and the importance of receipt review.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Qu

How do I make s
virtual employee
taking care of ex
in a timely mann

How can I better
how the recent c
have impacted e
perceptions of th

How can I better
the new trends i
with all of the re
workforce chang

zation Queries

do I know which
rts are best for me?

re can I find my
om fields?

can I find out
to manage my
reports?

How can I share data across my organization?

Hack: Utilize bursting to easily distribute report contents to an entire group. (Requires Concur Intelligence)

Next Steps:

- Build a report, then schedule a burst-format distribution.
- Use bursting as a communication tool to reach end users, delivering automated, relevant reports to employees and/or their hierarchy.
- Consider using bursting for users who are entering expenses for the first time (or after a long hiatus) to remind them of policy timelines and tips.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Questions | **Spend Control Concerns** | **Compliance Issues** | **Customization Queries**

How do I make s
virtual employee
taking care of ex
in a timely mann

How can I better
how the recent c
have impacted e
perceptions of th

How can I better
the new trends i
with all of the recent
workforce changes?

do I know which
rts are best for me?

re can I find my
om fields?

can I find out
to manage my
reports?

How do I know which reports are best for me?

Hack: See the Standard reports catalog for previews and specifics on various reports, and you won't have to guess what you need.

Next Steps:

- When building a report, always start from an existing report.
- When using a report for the first time, select a brief time period and start with your own data, so you can recognize what each field represents.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Qu

How do I make s
virtual employee
taking care of ex
in a timely mann

How can I better
how the recent c
have impacted e
perceptions of th

How can I better
the new trends i
with all of the re
workforce chang

zation Queries

do I know which
rts are best for me?

re can I find my
om fields?

can I find out
to manage my
reports?

Where can I find my custom fields?

Hack: If you're seeing reports with generic field labels instead of your cost entries, divisions, departments, etc., run the Configuration report from Expense Administration.

Next Steps:

- Evaluate the report to see the generic field label and the customized label you've created.
- Keep a "cheat sheet" handy, so you know which Custom Field belongs to which values.
- Create Custom Field Mapping to help with report building.

SAP Concur

THE BEST RUN SAP

The Reporting Answer Guide

Click below for quick hacks to the most common reporting questions.

Virtual Workforce Questions | Spend Control Concerns | Compliance Issues | Customization Queries

How can I find out how to manage my own reports?

Hack: Leverage the training videos found on the Concur Training site.

Next Steps:

- Make sure you have the appropriate role assigned – contact your Concur administrator if you require additional access.
- Use Data Model documentation to decipher the data available.
- If you're building a detailed or complex report, you can find additional training here.