The presentation will begin shortly. Audio will be streamed directly via your computer speakers. Enjoy the webcast!

SAP Concur
How to Build and Leverage a Powerful Reporting Program
A Solution Series Webinar

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Agenda

• How to get started or refresh your reporting strategy

• The benefits of a self-service reporting model

• How to access training and tips for your specific reporting tool

• Advanced reporting features to enable a more streamlined process and prepare for the future of Analytics
Customer Analytics Portfolio

- Analysis (no cost)
- Intelligence (buy-up)
- Consultative Intelligence (product and service bundle)
- Cognos-based
- Nightly archived

- Analytics Essentials (no cost)
- Analytics (buy-up)
- Proprietary solution
- Specifically designed for small and medium size customers
- Near real-time access to data

- New solution currently in development
- Ultimately will replace Intelligence
- No-cost, buy-up and product/service bundles will be available
- Near real-time access to data
One Embedded Analytics Platform – Varying Content Packages

**Customer Access Point**

All Customers Should access the same analytics system regardless of which product their user “lives” in.

**Content Visualization**

System should enable content / reports / data based on the product portfolio of the customer and the persona accessing. Content should be also surfaced within the workflow of individual products to drive better decisions at time of action.

**Data Consolidation**

Customer data should be consolidated, normalized and enriched to support combined analytics & product feedback integrations across ISM.

**BU Data Platform**

BU responsible for maintaining the company specific BU & level of data quality. Cleansed data will be written back from ISG to BU where and when necessary.
“The goal is to turn data into information, and information into insight.”

Carly Fiorina, former executive, president, and chair of Hewlett-Packard Co.
Travel Reservation Types

Administration > Expense > Policies > desired policy > Expense Types > Travel Reservation Type Mapping

What:
- Allows creation of pre-populated expense reports with trip data

Why:
- Precise mapping increases accuracy in reporting
- Highly recommended for clients who wish to have accurate booking leakage reporting.

Reference Documents:
- Best Practices – Expense Configuration for Analysis / Intelligence
- Policies Setup Guide
Match Categories
Administration > Expense > Reporting Configuration

What:
- Enable system powered matching of expenses and itineraries

Why:
- Control trip matching processes when user declines Smart Match
- Highly recommended for clients who wish to have accurate booking leakage reporting.

Reference Documents:
- Reporting Configuration Setup Guide
- Training Video
What:
- Group similar expenses in to designated categories

Why:
- Precise mapping increases accuracy in reporting
- Highly recommended for clients who wish to have accurate booking leakage reporting.

Reference Documents:
- Best Practices – Expense Configuration for Analysis / Intelligence
- Expense Type Setup Guide

Spend Categories
Administration > Expense (or invoice) > Expense Types
Fiscal Calendar
Administration > Expense (or Invoice) > Reporting Configuration

What:
- Ability to define accounting periods independent of the standard calendar year

Why:
- Control prebuilt filters date filters for reports and dashboards
- Define BI Manager budget periods

Reference Documents:
- Reporting Configuration Setup Guide
- Training Video
Concept Fields
Administration > Expense > Map Expense Concept Fields

What:
- Map your Org Unit and Custom fields to one of five core "concepts"

Why:
- Allows report writers to create reports with these concepts without having to know the actual Org Unit or Custom field names.

Reference Documents:
- Concept Fields for Analysis / Intelligence
- Training Video
**What:**
- Allows a broader base of users to access the Cognos reporting tools

**Why:**
- Allows "line managers" to monitor and evaluate the T&E spend for which they are directly responsible.
- No Reporting Roles are necessary to view reports as a BI Manager

**Reference Documents:**
- [Analysis / Intelligence Overview](#)
Reporting Configuration Preferences
Administration > Expense (or Invoice) > Reporting Configuration

What:
- Preferences

Why:
- Controls BI Manager Preferences
- Pushes Fiscal Calendar settings to standard reports

Reference Documents:
- Reporting Configuration Setup Guide
- Training Video
What:
- Set of alerts that are delivered to BI Managers via email

Why:
- Monitor when spend reaches a defined percentage of budget
- Alerts on potentially suspicious credit card transactions

Reference Documents:
- Actionable Analytics User Guide
- Actionable Analytics BI Manager User Guide
Dashboard Metrics

What:
- This feature allows the user to see a variety of key metrics in a single view

Why:
- Simple to Configure
- Large catalog of prebuilt visualizations
- Each visualization can be run independently

Reference Documents:
- Dashboard Metrics User Guide
Automation Tools

Why:
- Allows report admins to minimize the amount of time running reports, to focus on analyzing data

Reference Documents:
- Intelligence Training Manual
- Bursting User Guide

Report View
Jobs
Schedule
Bursting
Event Based Alerts
Be Strategic with Custom Reports

What:
- Organize and build a strategy around your data

Why:
- Reduces duplicate reports
- Simplify navigation
- Consolidate similar reports

Review Custom Reports
- Look at what has been run, and by whom, in the last 18 months

Disable vs Delete
- Inactive reports can be disabled, in the event they are needed

Leverage “Archive Folders”
- Move disabled, inactive reports into an “Archive Folder” before deleting

Why Reinvent the Wheel?
- Expense Accrual
- Expense Entry Analysis
- Credit Card Transactions

Reference Documents:
- Intelligence Training Manual
- Standard Report Catalog
Best Reports to Track Business Metrics

What:
- Reports to track your success against your business objectives

Why:
- Note your data, and track your progress over time
- Identify opportunities to improve

Reference Documents:
- Best Reports to Track Business Metrics
- Standard Report Catalog

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Rating Summary</td>
<td>• View how satisfied users are with Concur Expense or Travel.</td>
</tr>
<tr>
<td>Payment Type Analysis</td>
<td>• Track key operation performance metrics related to the corporate card program</td>
</tr>
<tr>
<td>Adoption (Air, Car, Hotel)</td>
<td>• Captures users not purchasing tickets through Concur Travel, but going direct to the agent</td>
</tr>
<tr>
<td>Top 10 Longest to Approve</td>
<td>• Identify outliers in your approval workflow process</td>
</tr>
<tr>
<td>Excessive Personal Car Mileage</td>
<td>• Identify how much is being spent on card mileage to create and enforce sensible policy</td>
</tr>
</tbody>
</table>
Review the “Quiet” activity

What:
- Develop a system to manage old, or irrelevant reports and data

Why:
- Some data may be negatively impacting your reports
- Creates unnecessary system slow downs

Reference Documents:
- Intelligence Training Manual
- Standard Report Catalog

Unprocessed Spend for Inactive Employees
Unassigned Credit Cards
Incomplete Employee Profiles
Aging Personal Spend
Aging Late Fees
Expense Types without Account Codes
Inactive Employees with Active Roles
Top Spenders without Corporate Cards
Final thoughts

Consider analytics in all policy and configuration changes

Be strategic in how you use data

Be proactive rather than reactive
Questions?
Thank You.

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