SAP Concur

Analytics User FAQ

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Key product definitions

A **tile** represents an individual key performance indicator (KPI) that is displayed on a dashboard. A KPI is similar to a report in that a query is built in order to retrieve the data, however, it is displayed graphically in a bar chart, pie chart, etc. Each KPI/tile represents one data point.

A **dashboard consists** of multiple KPIs that can represent a variety of data types, i.e., accrual, current quarter spend, policy violations.

A **report** contains data that is relevant to the customer and is in a column and row format similar to an Excel spreadsheet.

What is Analytics?

Control spend as – or even before – it happens. With Analytics, you'll see spending data from your core SAP Concur products in one place. Data comes into Analytics from Concur Travel, Expense, and Invoice. Analytics then organizes and presents in a digestible way to give you actionable insights. With these insights, you can spot trends by spending category, be alerted when you're approaching thresholds, and identify employees that might need to adjust spending habits.

With this visibility, you'll be better equipped to rein in spending before it gets out of hand and make decisions that will maximize the impact of your spend.

Is Analytics a new product or a replacement?

Analytics is a dynamic reporting tool designed specifically with SMB organizations in mind. For now, we offer Analytics as well as our legacy Intelligence platform.

Analytics is a dynamic reporting tool made to provide visibility into your spend, provide the data you want with near real-time reporting, and alert you when you're hitting spending thresholds – all so you can make better business decisions.

How do I access Analytics?

To access the Analytics tool, log into your SAP Concur account and click the *Analytics* tab at the top of the home page.

What dashboards are available with Analytics?

Analytics provides six standard dashboards, all of which you can access on the Analytics home page by selecting *Analytics Home.* The reports are listed under *Standard Content.* All dashboards are indicated by the chart icon – except for the Spend Analysis Dashboard, which is indicated by the three-box icon.

What level data will I see on these dashboards?

The data you see depends on your role. Analytics provides two role-based dashboard views:

- **Manager** - Allows approvers and managers a view of data for themselves and the people for whom they approve expense reports – typically their direct and indirect reports.
- **Financial Administrator** - Provides a global view of data for the entire organization.

To change the dashboard view:

1. Click the *View As* dropdown arrow on the Analytics home page.
2. Select either *Financial Administrator* or *Manager.*

Can I filter the data I see on a dashboard?

Yes. When displayed, you can view KPIs by month or quarter. Choose your view by selecting the *Month* or *Quarter* on a tile.

The Travel Overview dashboard also has secondary filters on the tiles that allow you to filter data by spend category. Spend category filters include air, hotel, car, rail, meals, and other. Other is the cumulative amount of spend from categories other than the specific spend categories mentioned. You can manipulate these by selecting your desired category in the upper-right corner of a travel tile.

Can I customize the tiles on my dashboards?

You can add, remove, resize, and move tiles to personalize your dashboard views.

To customize tiles:

1. Click *Analytics Home.*
2. Select either the *Expense Overview, Financial Administrator Overview,* or the *Spend Analysis* dashboard.
3. Click *Edit.*
4. Once in edit mode, you'll be able to:
    a. Delete a tile by clicking the *X* in the upper-right corner of the tile.
    b. Resize a tile using the resizing arrow in the lower-right corner of the tile.
    c. Move a tile by dragging and dropping.
    d. Add a tile by selecting the *...* icon then selecting *Add Tile.*
5. Click *Save As...* after making all your desired changes.
6. Title your new dashboard and, if you wish to do so, turn the *Save with my company* toggle on.
7. Click *Save.* You'll find the custom view of the report in the *User Content* section when clicking *Analytics Home.*

Are the same standard reports available to me as before?

You will recognize some of the same standard reports in Analytics. However, there are fewer pre-built reports by design. The added functionality to filter, group, and customize reports allows you to manipulate reports to see all the data you need and nothing more.

How do I view a standard report?

To view a standard report, click *Analytics Home* then, in the *Standard Content* section, click the standard report you would like to view. Standard reports will be indicated by the grid icon.

Can I customize standard reports?

With Analytics, you can modify standard reports and save them as new, custom reports. For convenience and ease of use, standard reports show the most common data elements of a report. However, you are able to add or delete data fields, add or delete aggregations, and move and sort columns.

To customize a standard report:

1. In an open standard report, click *Edit.*
2. Scroll to the bottom of the data grid and click *Modify Columns.*
3. Here you can add and delete data fields and aggregations as well as reorder items. You can preview changes in the data grid.
4. When you've completed making the desired changes, click *Done Editing.*
5. Click *Save As.*
6. Add a title and description, adjust the *Share with my company* toggle on, and click *Save.*

Can I group data in a standard report?

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 organized by employee or expense type.

Standard reports each have multiple grouping options. You will only see the grouping options that apply to the data you are viewing. To group a report:

1. Open a report.
2. Click the group icon.
3. Select the appropriate group option from the dropdown list. Your report will be grouped accordingly.

Can I filter the data in a standard report?

Analytics allows you to apply filters to reports to produce 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 of the pre-built filters.

To filter a standard report:

1. In an open standard report, click the filter icon.
2. Click the field or dropdown arrow to select the filter you want to use.
3. Click *Update.*

How do I export reports?

To export a report, click the ... icon. Select *Export* from the dropdown list then select whether you would like your report exported in a PDF or Excel format.

How do I schedule a report?

If you would like a report to run automatically, you can schedule a report. Scheduling makes running recurring reports much more convenient and you can share the report via e-mail with others.

To schedule a report:

1. In an open report, click the ... icon then select *Schedule Report.*
2. Using the dropdown menu at the top of the form, select whether you'd like the report to execute daily, weekly, or monthly.
3. In the *SEND TO* field, add those within your organization that you wish to share the report with. If you are running the report just for yourself, enter your name in this field.
4. Complete the remaining fields to determine how frequently the report will run, the time the report will run, and the start and end date of the schedule (if needed).
5. Click *Next* and, if necessary, refine your scheduled report by completing any of the data fields.
6. Click *Next* to review.
7. Click *Confirm* to schedule your report.

Can I add custom fields to a report?

Analytics Essentials users have the ability to add custom fields to applicable reports.

To add additional data fields to a standard report:

1. In a standard report, click the ... icon.
2. Select *Custom Fields* from the drop-down menu.
3. Click the + icon.
4. Select the field you would like to add then click *Add selected custom field.*
5. Once you have finished adding all the custom fields you want, click *Return to Report.*

Can I share a report or dashboard with my company?

Users who modify a standard report or dashboard can share a copy of their custom report or dashboard with other employees who have access to Analytics. Simply turn on the *Shared with my company* toggle that appears next to a report or dashboard title on.

The shared content will display in the *Company Content* section after clicking *Analytics Home.*

Reports can also be shared with employees who do not have access to Analytics via a scheduled e-mail (see *How do I schedule a report?* above). Dashboards, however, cannot be shared with employees who do not have access to this product

What browsers work with the new Analytics platform?

The new Analytics platform is compatible with Internet Explorer, Google Chrome, Firefox, Microsoft Edge, and Safari.

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