This sample chapter describes the reporting capabilities of Concur. It covers both the standard Concur Analysis offering, as well as Concur Intelligence. It also describes how to build and edit reports using two separate tools: Query Studio and Report Studio.
Concur’s reporting capabilities provide detailed insight into your T&E spending, allowing for both cost savings and increased efficiency for your organization.

6 Concur Reporting

Concur’s reporting solution offers comprehensive insight into all your T&E data. Concur’s reporting uses IBM’s Cognos reporting solution, a web-based tool that allows you to create queries, reports, and dashboards that can be run and viewed on desktops and mobile devices. It also allows you to extract and share reports in multiple ways.

The Cognos tool can report using simple queries; more complex, structured management-style ones; and interactive dashboards. Reports and queries can be exported into multiple formats, such as HTML, Excel, PDF, or CSV, and shared using distribution options such as report bursting. Data is updated from Concur into Cognos by nightly batch jobs; thus, the data available in Concur reports will always be correct as of the previous day. This process also includes permission assignments and changes.

Concur’s reporting uses a hierarchical structure to restrict users to reporting on data that is relevant to them and their teams. The one exception to the application of the hierarchical structure authorizations arises when a user has been directly assigned to a user’s profile as a BI Manager. Regardless of the hierarchical structure, BI managers will be able to report on the Concur data of any of their assigned users.

During your Concur implementation, one standard reporting currency will be selected for all countries using Concur. This currency may be different than the currency that your country uses in Concur. All standard reports will show values in this reporting currency; to report in your country’s relevant currency, different currencies can be added to the report by your report administrator.
In this chapter, we take a look at the reporting features available in standard Concur Analysis and Concur Intelligence, including a look at the standard reports available in Concur, creating your own queries and reports using Query Studio and Report Studio, and dashboards.

6.1 T&E Analysis vs. Concur Intelligence Tools

The reporting options for your T&E data in Concur come in two versions: the standard Concur Analysis offering and the premium version known as Concur Intelligence. There are several differences between the two reporting versions, including the following:

- Number of standard reports available across the Concur Travel and Concur Expense modules
- Number of user licences
- Studio tools provided to build custom reports
- Report scheduling and automated distribution options (known as report bursting)
- Availability of integrated T&E reporting
- Presence of reporting dashboards

Concur comes with access to the standard Concur Analysis reporting; Concur Intelligence reporting can be purchased as an add-on feature. In the following sections, we’ll first discuss features common to both reporting options before diving into some tools exclusive to Concur Intelligence.

6.1.1 Concur Analysis and Concur Intelligence: Shared Tools

Concur Intelligence and Concur Analysis share several standard features and tools, as we’ll explore in the following subsections. In some cases, Concur Intelligence includes additional functionality.

Default Reports

The number of standard prebuilt reports varies between Concur Analysis and Concur Intelligence, with the latter containing all the reports available in Concur Analysis and more. As of December 2016, this includes 138 standard Concur Analysis reports and 187 Concur Intelligence reports. These standard prebuilt reports are based on Concur’s key T&E reporting metrics and data. In order to manage the large number of standard reports available, Concur has comprehensive catalogues that provide a definition, for each report, its data, and its intended audience. This information can be found under the HELP menu on the CONCUR CONNECT homepage, as shown in Figure 6.1.

Figure 6.1 Concur Report Catalog

Report Design Tools

There are two report design tools available in Concur: Query Studio and Report Studio. Query Studio is available in both Concur Analysis and Concur Intelligence; Report Studio is available in Concur Intelligence. Both are flexible tools that you can use to design new queries and reports, in addition to the standard prebuilt reports available in Concur. In addition, extra user licences for Query Studio come with Concur Intelligence; Concur Intelligence provides twenty licences standard, versus five licences in standard Concur Analysis.

Because each reporting option provides access to different studio tools, the ability to modify the standard Concur reports will depend on whether the report was made with Query Studio or Report Studio. The appropriate studio tool access is required to modify a standard report; for example, if you have the standard Concur Analysis reporting feature, you do not have access to the Report Studio tool and therefore can’t modify any standard reports built in Report Studio. If you have Concur Intelligence but only a user licence for the Query Studio, then you can access all the reports that Concur has to offer, but you can only amend those standard reports that have been built in Query Studio.
Concur Reporting

We’ll cover the using the Query Studio and Report Studio tools in greater detail in Section 6.3 and Section 6.4.

User Roles and Licences

The Concur Analysis and Concur Intelligence offerings each allow for a different type and number of user licences. The different types of licences are as follows:

- The consumer licence allows a user to run any of the prebuilt and customer reports available.
- The business author licence allows a user to run all the reports available and gives access to the Query Studio to build simple reports.
- The professional author licence allows a user to run all reports available and gives access to both Query Studio and Report Studio to build a range of reports.
- The manager licence allows a user access to run the reports available for only their direct and indirect employees.

Table 6.1 provides a summary of the number of users allowed under each license type for both standard Concur Analysis and Concur Intelligence.

<table>
<thead>
<tr>
<th>User License Type</th>
<th>Concur Analysis</th>
<th>Concur Intelligence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer</td>
<td>10</td>
<td>40</td>
</tr>
<tr>
<td>Business author</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>Professional author</td>
<td>N/A</td>
<td>10</td>
</tr>
<tr>
<td>Manager</td>
<td>Unlimited</td>
<td>Unlimited</td>
</tr>
</tbody>
</table>

Table 6.1  Cognos Reporting Licenses: Numbers and Types

6.1.2 Concur Intelligence-Only Tools

The following reporting features are only available in Concur Intelligence:

- Scheduling and bursting of reports
  Scheduling within Concur reporting allows for the scheduled, automated running and distribution of reports. Bursting is a feature whereby the report scheduled is tailored to the recipient, showing only data relevant to him.
- Reporting dashboards
  Dashboards are an easy data visualization tool with which key metrics and key performance indicators (KPIs) can be monitored and managed on a single screen specifically configured for a target audience, which can contain up to six reports. Concur offers prebuilt dashboards designed for the most commonly used reports, as well as tools to build your own.

- Alert and exception notifications
  Exception-based highlighting is a tool within Concur’s reporting to alert budget managers when important figures in their budgets change in a significant manner. Triggered alerts will alert budget managers to suspicious card transactions for their budget or to budget changes that may require review and correction action to be taken. Concur’s reporting uses budget values set in the budget manager’s user profile to determine exceptions and alerts.

- Integrated T&E data
  If you use both Concur Travel and Concur Expense, integration of data from both modules in reporting is only available in the Concur Intelligence offering.

6.2 Using Existing Reports

Concur offers several standard reports, providing insight into all aspects of your T&E spending, including integrated reports if you use Concur Travel and Concur Expense.

The standard reports can be found in the Concur Analysis/Concur Intelligence Standard Report folders and are organized into a folder structure for reporting areas across T&E data, including additional reporting areas for how Concur is being used in your company.

Before we look at how to run the standard reports available, we’ll look through the preferences that you can set in Cognos to enhance your reporting.

6.2.1 Set Reporting Preferences

Your reporting preferences can be found in the My Area options, as indicated by the person icon, available from the Concur Connect page. There are three areas of preferences that you can set (see Figure 6.2), each of which will be discussed in the following sections. Any changes that you make to your preferences take effect immediately.
General Preferences

The General Preferences tab sets preferences for how reports and queries will be displayed and run. Some of these settings are also available when you select to run a report using the Run With Options function (for more details, see Section 6.2.2). Table 6.2 lists some of the general preferences options.

<table>
<thead>
<tr>
<th>Preference Setting</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Entries in List View</td>
<td>The value entered will define the number of entries shown in a list.</td>
</tr>
<tr>
<td>Report Format</td>
<td>Defines the default format in which a report will be exported from Cognos:</td>
</tr>
<tr>
<td></td>
<td>- HTML</td>
</tr>
<tr>
<td></td>
<td>- PDF</td>
</tr>
<tr>
<td></td>
<td>- EXCEL</td>
</tr>
<tr>
<td></td>
<td>- CSV</td>
</tr>
<tr>
<td>Product Language and Content Language</td>
<td>The language used to display Cognos reports and content data can be personalized here to match your local language. However, reports can be created in specific languages other than the default set and will override any preferences set in your profile.</td>
</tr>
</tbody>
</table>

Table 6.2 Preference Settings Available in Cognos (Cont.)

<table>
<thead>
<tr>
<th>Preference Setting</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal Default View</td>
<td>The reports and folders in the portal can either be displayed in a simple list view or in a detail view; the latter shows a short description of each folder or report as available for the individual item.</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Cognos has a default time zone of UTC. The preference set here can change the time zone that your Cognos installation uses. You should change this setting to your local time zone if you want to schedule report jobs to run and be distributed in your local time zone.</td>
</tr>
<tr>
<td>Enable Bi-Directional Language Support</td>
<td>This setting will allow you to view numbers in Arabic, Hebrew, Urdu, and Farsi in the correct left-to-right format while still viewing text in the right-to-left format correct for these languages.</td>
</tr>
</tbody>
</table>

Personal Preferences

The Personal Preferences tab contains logon details for the Cognos connection workspace. Your usual logon details will be listed as your Primary Logon; if you have additional logon information for any other workspaces, it can be listed under Secondary Logon.

The Alerts Email field can be used to define an email address that Cognos alerts are sent to for notifications of specific events.

Other preferences include settings to apply Credentials, Groups and Roles, and Capabilities. Many of these settings may be read-only for your Cognos connection. These settings perform the following functions:

- Credentials can provide authorizations to other users, groups, or roles to run report entries.
- Groups and Roles will show the groups in Cognos and the Cognos roles that are assigned to your primary and secondary logons as applicable.
- Capabilities will show functions and features available based on your primary and secondary logons. This is a useful view to check if you’re authorized for specific activities in Cognos reporting.
Portal Tab Preferences

The last tab is for Portal Tab Preferences, in which settings can be made for the portal tabs shown on the Cognos connection homepage. Here, you can modify the sequence of the tabs that are shown and add new/hide existing tabs as needed.

6.2.2 Running a Standard Report

The Reporting tile can be found on the My Concur homepage, and the types of reports shown will depend on the product (either Concur Analysis or Concur Intelligence) that your company uses or the reporting access assigned within Cognos.

Use the Reporting tile to open the screen shown in Figure 6.3, launching Concur’s reporting features.

![Figure 6.3](image)

The CONCUR Connection homepage includes the following four main areas:

1. **Folders and dashboard tabs**
   These tabs allow access to folders containing reports and to dashboards.

2. **Report folders**
   All the standard reports and metrics are arranged into a folder structure. For Concur Intelligence, there are four main folders (see Table 6.3); the folders are the same for Concur Analysis reporting, except that the Dashboard Metrics folder is not available.

### Table 6.3 Reporting Folders in Cognos

<table>
<thead>
<tr>
<th>Folder Name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONCUR DATA WAREHOUSE</td>
<td>Contains the Concur data warehouse model. It will appear empty, but must not be deleted.</td>
</tr>
<tr>
<td>INTELLIGENCE—STANDARD REPORTS</td>
<td>This folder will contain all the standard reports available in either Concur Analysis or Concur Intelligence reporting.</td>
</tr>
<tr>
<td>ANALYSIS—STANDARD REPORTS</td>
<td>This folder will contain all the standard reports available in either Concur Analysis or Concur Intelligence reporting.</td>
</tr>
<tr>
<td>&lt;YOUR COMPANY NAME&gt;</td>
<td>The report folder will be named after your company and customer number. This report folder can be used to share reports between users in your company.</td>
</tr>
<tr>
<td>DASHBOARD METRICS</td>
<td>Any metrics that can be added to reporting dashboards will be contained here.</td>
</tr>
</tbody>
</table>

3. **Reporting tools**
   Standard tools to create new report folders, schedule report jobs, set folder properties etc.

4. **Homepage navigation**
   Tools to navigate to Cognos help, personal settings and preferences with reporting.

**Personal Folders**

If you create a report or report view in any tool, and save the new report to your Personal Folder, found under My Folders, then the report can’t be seen or shared with any other reporting administrator. To access the report, another user will need to be set as your delegate.

To share reports across the organization, a reporting administrator should set up a shared folder structure under your company’s folder in the public folders.

To run a standard report, navigate via the relevant folder structure to the report and click on it. This will open a report prompt page on which you can enter your report selection criteria. Different prompt fields will appear depending on the data set for your chosen report. Figure 6.4 shows a report that uses both a date-type prompt (SENT FOR PAYMENT DATE) and a value-type prompt (EMPLOYEE).

Enter your report criteria, and click Finish to run the report.
You can also set a report to run with layout or output options different than your usual default stored values when you run the report by using the **Run with Options** selection button under the **Actions** column on the right-hand side of the screen. Advanced options (see Figure 6.5) also allow you to choose additional formats to run the report in, choose other languages for the report, and schedule the report to run at a specific time and date. To schedule a report to run as a recurring job, use the scheduling feature described in Section 6.4.2.

Using additional options to run your report will also allow the report to be distributed to recipients when the report has been run in the background. When the **Time and Mode** of the report is set as **Run in the Background**, Cognos will show the **Delivery** options. Here, choose **Send by Email** for the report to be sent out to users. The email distribution list, email title, and a message can be included in the email.

Once a report has been run, a report view can be created to save the report selection parameters and thus make the report output repeatable. The report view can be saved into shared folders to be shared across your organization. To do so, under the **Keep This Version** dropdown (see Figure 6.6), select the **Save as**
Report View... option. Cognos will ask for a save location to be specified; the default save location will be your My Folder area. Once saved, the report view can be accessed quickly from a folder by any user permissioned for the folder. Selecting the report will run it with the saved selections criteria.

Image Figure 6.6 The Report View Option Makes a Report Repeatable

6.3 Building and Editing Reports in Query Studio

Query Studio is a lightweight tool that allows you to create simple queries and reports. To launch Query Studio, select the Launch menu, then select Query Studio.

Cognos will ask you to confirm the data warehouse package to use for Query Studio. For this example, select Concur Data Warehouse.

The Query Designer screen contains three main areas (see Figure 6.7):

1. Data and related functions panel
   This area allows you to insert data, edit data, change a report layout, run the report, and manage a file.

2. Toolbar
   This area contains the most commonly used report functions in the standard toolbar and font settings in the font toolbar to be used in your report.

3. Report design panel
   In this design area, you’ll build your report.

Image Figure 6.7 Query Studio

Query Studio allows you to create two different types of reports:

- A list report will show data in simple lists and is best suited to simple value lists of data. List reports show simple queries, such as the total spend for an expense type for the whole company.

- A crosstab report is a list report with columns and rows of data; a measure at the intersections of each column and row to provide a summary of the data. Crosstab reports can provide more detailed information, such as the total spend of an expense type per country or business unit to provide a more detailed breakdown.

In the following subsections, we’ll cover how to create a new report in Query Studio before moving on to manipulating data within reports.

6.3.1 Creating a New Report

Query Studio allows you to create simple, list-style reports, manipulate data, and add charts for visual representation. The first step to create a new report is to select the New Report button on the toolbar button to open a blank report screen.

From the data menu on the left-hand side of the screen, each piece of data information that can be used in reporting is organized into a comprehensive folder.
structure within the areas of Expense, Invoice, Travel, Meetings, and Configuration. To add a new piece of data into your report, simply select the field from the data menu and either double-click on the data item or use the INSERT button found at the bottom of the menu to add the data item to the report. Data items are added from left to right, but you can use drag and drop to drop the data items into specific places. Continue to add data fields to your report until you have all the desired data.

Delete any data field added to the report by selecting the column and clicking on the DELETE button on the toolbar.

Titles can be added to reports by double clicking on the title to select the TITLE option in the report design panel; Cognos will open the EDIT TITLE AREA, providing access to fields for the report title and subtitle and options to show any filters, sorting, or data suppression when applied to the report (see Figure 6.8).

To save the report created, click the SAVE button on the toolbar; Cognos will then ask for a report NAME, short DESCRIPTION for the report, SCREEN TIP, and a save LOCATION, as shown in Figure 6.9. The save location for a new report will default to your MY FOLDER location. To save the report to another shared location within your company, choose another location. Reports can only be saved to locations a user has permission to access.

![Figure 6.9 Saving Newly Created Report](image)

### 6.3.2 Manipulating Data within Reports

Several data manipulation techniques are available to make alterations to your report, including renaming data columns, filtering, summaries, and calculations, all of which can be accessed via the toolbar at the top of the report designer page. You can perform the following actions:

- Column header names can be renamed to something more specific and informative for your organization by double-clicking on the required column header to open the renaming options.
Filters can be added to reports to both ensure that only relevant data is being reported and provide performance improvements. When adding a filter value based on a column selection, you can include or exclude data from the report in several ways depending on the data being filtered. Filters can also be combined for more complexity. One common filter to include in reports removes test users from any user administration reports.

Calculations can be added to your queries to provide sums, averages, and counts for the data of a single column or to multiply values in two columns and provide the resulting value in a third column. Multiplication calculations in reports can be useful for budget-related predictions, such as seeing how a cost increase for a specific expense could affect a budget.

Reports automatically summarize data to remove the repetition of measure values within the report and to improve the performance, look, and feel of the report. For example, when reporting on the total value of an expense, the summarization of the data will report the total expense type and value rather than reporting each individual line item instance and individual value of that expense type. The option to automatically summarize data and values can be deactivated for a report through the advanced runtime options for the report.

Suppressing cell options can be used to hide empty cells values from your finished report. The suppression options can be applied to cells, rows, or cells and rows of data within the report from the appropriate button on the toolbar.

Adding Charts
Several chart types can be added to a report for a visual representation of the data and to show patterns and trends in the data.

6.4 Building and Editing Reports in Report Studio

In the previous section, we covered how Query Studio can create simple data queries; now, we’ll look at Report Studio and how it can be used to create more complex, management-style reports.

A report created with Report Studio will consist of multiple pages used to define the layout and presentation of the report. The report layout pages will design how the report will look, including how the data is presented with report style and chart options; how the data is formatted, such as font, color, and text options; and how the data will flow from one page to the next if the report crosses multiple pages. A prompt page for the report can be also be built for report selections. One or multiple queries can be used in the report to provide added levels of detail and complexity or to use key functionalities such as report bursting. Reports created with Report Studio can contain multiple objects, such as charts and lists, and multiple nonreport objects, such as logos and images, to create a more stylized report.

The Report Studio homepage (see Figure 6.10) includes five main areas, as follows:

1. The Data and Related Function panel allows you to insert data, edit data, change a report layout, run the report, and manage the file.
2. The Properties panel allows you to configure various properties for data, queries, or report page selections.
3. The most used report functions are in the standard toolbar, and font settings are in the font toolbar.
4. The Report Designer panel is where you’ll build your report, including sidebar navigation through the different pages and queries that make up your report.
5. Explorer Bars can help you navigate the multiple layers that make up the report, including multiple queries or pages in the report; the condition explorer works with different variables that define conditions in your report.

Figure 6.10 Report Studio Homepage
Comparing the Report Studio homepage with the Query Studio homepage shown in Figure 6.7 you’ll see many more toolbar options in Report Studio, as well as additional options for manipulation of data parameters.

In the following subsections, we’ll provide a quick primer on the types of reports and their structure, discuss creating a report, and then walk through the process of bursting reports.

### 6.4.1 Report Types and Structures

The report designer offers several report types that can be created to represent the data in the most appropriate manner. Report types available include the basic list to show columns of data, the crosstab to show rows and columns of data with a measure at the intersection of each, and chart reports to show the data graphically. Different report styles will suit different reports best, depending on whether the data being reported on is relational or dimensional. Once the report type has been selected, Cognos will open the Report Studio homepage.

Report Studio can be used to create either relational or dimensional reports, whichever suits the report specification better. The relational reporting style should be used for relational data and is best represented by lists and list reports. Dimensional reporting styles are appropriate for dimensional data, which are best represented by crosstab, map, and chart reports. When authoring a new report, take a moment to consider how you view your data. If you consider your data in list, tables, and columns, then your chosen reporting style is relational. If you consider your data using different dimensions and measures and with various cells intersecting, then your reporting style is dimensional.

Reports created in Report Studio will consist of at least two components: the report layout and the report query, crossing multiple report pages.

A report layout is the set of pages that define how the report appears to the user, including how the data is presented, such as a chart or a crosstab layout; any report formatting and specification for how data should flow from one page to the next if necessary is part of the layout.

The queries included in a report will define the data that appears in that report, and multiple queries can be used in a single report. As an example of using multiple queries in a report, you can configure a report that is burst to recipients, in Section 6.4.3, in which one query is used to report data and the second query is used to collate who should receive the report. For a more detailed guide of how to configure a report to be burst to different users, see Section 6.4.3.

A report will consist of one or more report pages, which are used to design each step of the report, from the report prompt pages used to enter the report selections to the layout of the report itself in the report pages. The page explorer on the Explorer Bars bar can be used to navigate between the multiple pages that make up your report.

### 6.4.2 Creating a New Report

Access Report Studio in the same manner as Query Studio, using the same menu. When asked to confirm the data warehouse package to use, select Concur Data Warehouse.

Report Studio will then offer choices for the type of report to create (see Figure 6.11). Chose the appropriate report type depending the data to be reported on, click the OK button, and the Report Studio homepage will open.

![Figure 6.11 Different Report Styles Available in Report Studio](image)

Data items can be added to the report easily by selecting them from the data and related functions panel; either double-click an item, or drag and drop it into the Report Designer panel. As with Query Studio, data items are added left to right across the Report Designer panel. Many of the features and functions of Report Studio will behave in the same manner as in Query Studio. In the following subsections, we’ll cover some of the more advanced and unique features and functions of Report Studio.
Objects in Reports

Several objects can be added to your report to enhance the report features. Charts can be added to reports as individual objects to visually represent specific data and metrics within a wider report. There are several chart types available to represent different the metrics being demonstrated in a report, including straightforward visualizations, such as using line or bar charts to show data trends or pie charts to show percentages or proportions of a whole. You can also use combination charts to highlight the relationships among various sets of data or bubble and quadrant charts to show a comparison of key data metrics with respect to axis and size metrics.

Chart options can be selected from the Chart toolbar button; once you’ve created a chart in your report, several chart properties are available to be configured. Double-click on any aspect of your chart, and the Properties pane will allow customizations to be made. Figure 6.12 shows an example of some parameter options that can be applied to a data item, including data Type, Label, Expression, and Functions.

Scheduling Reports

Reports can be set to be run in the background and distributed to users on a daily, weekly, or monthly schedule. Scheduling reports will ensure that corporate reports are run on a regular basis using constant parameters and will ensure efficiency due to the scheduled job being set up once for multiple outputs. Any report in Cognos can be set to run on a schedule.

From the Cognos connection homepage, select More Actions for the specific report, then select the New Schedule option to open the New Schedule screen (see Figure 6.13).

In the schedule selection screen, as seen in Figure 6.13, set the following parameters to create the report schedule:

- **Frequency**
  - Select the frequency with which the report should be run.

- **Start and End dates**
  - Enter the date on which the report schedule should first run, and enter an end date if appropriate. The end date can be left set to the default No END DATE selection for the job to run on an ongoing basis.
Override the Default Values
Select this radio button to override the report’s default values for the report output and format to be selected.

Delivery
Choose the delivery method required, such as Send a Link to the Report by Email.

Email Delivery of Schedule Reports
When setting up report schedules, reports can be set to be delivered by email to users once they’re run. The default option for the report to be attached to the email sent to users is unchecked. Select this option for the report to be attached to the email, not just contained in the body of the email.

The schedule manager will keep an overview of all schedules that have been set up and their statuses. The manager is useful for seeing an overview of the progress of any scheduled jobs and any outputs.

From the Cognos Connection homepage, launch the schedule manager from the My Preferences menu by selecting the My Activities and Schedules menu option. The schedule manager will show all report jobs scheduled and current, past, and upcoming activities. For each job scheduled, the schedule manager will report the status of the job, whether there were any warnings or errors when the job ran, and, if selected, the outputs from each scheduled job run.

6.4.3 Bursting Reports
Bursting of reports allows you to distribute reports to different parts of the business; each part of the business will only see data in the report that is relevant to it. For example, you may have created a standard format for a budget report that your organization requires budget managers to use. By using the bursting feature, the report can be configured and scheduled and delivered to each budget manager, reporting that manager’s own budget data only.

Report bursting can be based on the reporting hierarchy or BI managers or by means of a custom field for a more specific audience. The configuration for report bursting and distribution list is built directly into the Cognos report and selected as part of the report properties when the report is run.

Chart- and crosstab-explicit reports cannot be burst, but reports that contain chart or crosstab objects can be. Only the HTML, PDF, and XLS report formats can be burst.

To configure a report to be burst, you will use two queries. The first query will be the data content query—that is, identifying the data being reported—and the second query will define the recipients of the report—that is, who it’s being reported to.

The criteria by which you wish define your burst recipients must be contained in the content query for your report. For example, to create a report that will be burst to certain BI managers in a reporting group, then the content query must contain the data element reporting group. The recipient query must then contain the users to receive this query. For example, after go-live with Concur, you may want to check the employee uptake of Concur Expense, monitoring the number of expenses claims that employees are raising per reporting month, reported by BI managers for each division within your business. Figure 6.14 and Figure 6.15 illustrate how to create the report bursting configuration and how to schedule the report to send a weekly summary of the claims raised to each BI manager.

To configure a report to be burst, follow these steps:
1. Create and test the content query to ensure that the correct data is being reported.
2. Create a second query, the distribution query. In both queries, a common data element for Employee Org Unit has been included (see Figure 6.14).
3. In the burst dialog box (see Figure 6.15), under the Burst Groups settings (which sets the data to be burst), select the following:
   - Query
     Select the content query to be used to define the data to be returned.
   - Label
     Enter the selection for the criteria that will be used to burst the report.
   - Groups
     Click on the Pencil icon and create the data element that the burst groups will be grouped by; in this example, the bursting will be grouped by Employee Org Unit.
4. In the Burst Options dialog box, under the Burst Recipient settings (for the burst recipients’ data selections), make the following settings:

- **QUERY**
  Select the query to be used to populate the burst recipients.

- **DATA ITEM**
  Enter the item to be used to uniquely identify each recipient, such as an employee email address.

- **TYPE**
  This should always be set as **Email Addresses**.

- **MASTER DETAIL RELATIONSHIPS**
  The last setting is to link the content and recipient queries; in this case, the common data item between the two queries is **Employee Org Unit**.

Your report has now been configured for bursting. This report can now be scheduled to run automatically and distributed to the burst recipients.

From the report folder, select the report and choose **Run with Advanced Options** to set the report to burst. Under the **Time and Mode** selection, choose to run the report in the background, either now or at a specified time and date. The option to select the report to burst now can be selected. If a report has been scheduled in a job, then on the **Job Scheduling** screen ensure that the option to override the default values is checked on the prompt screen selections, enable the **BURST THE REPORT** checkbox, and chose the checkbox option to **SEND THE REPORT BY EMAIL**.

**Converting Query Studio Reports**

Report Studio can be used to elevate simple Query Studio reports into more complex Report Studio reports, with all the additional features and functions available in Report Studio added to the report.

Any report can be opened in Report Studio, either directly in Report Studio using the **OPEN** option in the **FILE** menu or from the Cognos connection homepage by using the **MORE** option under the **ACTI**ons column for the individual report. Once the report is opened in Report Studio, the report can be enhanced as required and then saved.
6.5 Dashboards

Dashboards help visualize current performance against various data metrics and KPIs. Concur provides a standard dashboard with six key metrics that can be customized for use in your company. Each metric can be changed to one of 50 other standard metrics that Cognos reporting provides, and any of the metrics available can also be run as standalone reports, found in the INTELLIGENCE • DASHBOARD METRICS folder.

On the Cognos reporting homepage, the reporting dashboards are located on the DASHBOARD NAVIGATION tab.

Concur also provides actionable analytics, which are dashboards and alert metrics that can be delivered directly to your BI manager via email for the expense spending that affects their budget. Each BI manager individually can elect to receive reports via the notification settings in her Concur profile, and these reports can map to the budget reporting information that managers can set up in their Concur profiles to give greater insight into the expense spending in their budgets. The BI manager reports are active by default, but each user must opt in to receive notifications and specify the notification frequency.

Each budget manager can specify quarterly budget amounts relevant to his budget in his Concur profile, as shown in Figure 6.16. The actionable analytics reports will then use these figures to track expense spending against the budget and to send alerts when a certain percentage of budget has been reached.

The actionable analytics alerts are configured to be turned off by default; once enabled, they’re enabled for all budget managers across a company. When an administrator activates the alerts, the budget threshold percentage is also specified; individual budget managers can change their threshold percentages as relevant to their individual budgets, as shown in Figure 6.17.

6.6 Summary

In this chapter, we discussed the reporting options available in Concur to provide insights into your company’s T&E data. We discussed the different reporting options available using either the standard Concur Analysis or Concur Intelligence reporting options and compared the functionalities and options that the
two options offer. We also provided an introduction to the Query Studio and Report Studio tools to give you an idea of the powerful queries and reports that can be created. Finally, we discussed the reporting dashboards that Concur provides and how they can be customized for your organization.

In the next chapter, we'll discuss integrating Concur with third-party applications and services.
## Contents

Preface ........................................................................................................................... 13

1 Introducing Concur Travel and Expense ................................................................. 17

   1.1 Typical Issues and Constraints of T&E Processes ........................................... 17
   1.1.1 Efficiency Problems .................................................................................. 18
   1.1.2 Ineffective Management of T&E ............................................................... 19
   1.1.3 Poor User Experience ............................................................................. 20

   1.2 A Vision for the T&E Process of the Future .................................................. 21
   1.2.1 Paper-Free .............................................................................................. 22
   1.2.2 Mobile ..................................................................................................... 24
   1.2.3 Automated .............................................................................................. 24
   1.2.4 Connected .............................................................................................. 25
   1.2.5 Easy to Use ............................................................................................. 26
   1.2.6 The Vision .............................................................................................. 26

   1.3 Concur Travel & Expense at a Glance ............................................................ 27
   1.3.1 Solution Overview ................................................................................... 27
   1.3.2 Travel ...................................................................................................... 31
   1.3.3 Expense .................................................................................................. 33
   1.3.4 Request ................................................................................................... 34
   1.3.5 Reporting ................................................................................................ 35
   1.3.6 Configuring Concur ................................................................................ 36

   1.4 The Business Case for Concur ......................................................................... 37
   1.5 Summary ......................................................................................................... 41

2 Employee and User Data ............................................................................................ 43

   2.1 Employee Master Record Fields ..................................................................... 44
      2.1.1 System Settings .................................................................................... 44
      2.1.2 Personal Information ........................................................................... 45
      2.1.3 User Administration Data .................................................................... 48

   2.2 Configuring Employee Forms ......................................................................... 51

   2.3 Permissions ..................................................................................................... 53

   2.4 Creating Employee Data ................................................................................ 55

   2.5 Summary ......................................................................................................... 57
3 Concur Travel ................................................................. 59
3.1 Business Principles ..................................................... 59
3.2 Using Concur Travel for Business Trips ......................... 62
  3.2.1 Concur Travel Profile .............................................. 63
  3.2.2 Using the Travel Wizard and Result Pages ................. 67
  3.2.3 The Booking Process ............................................. 70
3.3 Concur TripLink Integration and Concur TripIt App .......... 88
3.4 Basic Configuration for Concur Travel ......................... 90
  3.4.1 Rule Classes .......................................................... 91
  3.4.2 Travel Rules .......................................................... 92
  3.4.3 Custom Text .......................................................... 95
  3.4.4 Languages ................................................................ 96
  3.4.5 E-Receipts ............................................................. 97
  3.4.6 Travel Vendor Exclusions ....................................... 98
  3.4.7 Regional Hotel Rates ............................................. 98
  3.4.8 Travel Alternatives ................................................ 99
  3.4.9 Ghost/BTA Cards .................................................. 100
  3.4.10 Credit Card BIN Restrictions .................................. 101
  3.4.11 Reporting Requirements ....................................... 101
  3.4.12 Your T&E Policy .................................................. 103
  3.4.13 Managing Preferred Vendors in Concur ................... 106
3.5 Advanced Configuration Options for Concur Travel ........ 108
3.6 Summary ........................................................................ 111

4 Concur Expense ............................................................. 113
4.1 Business Principles ..................................................... 113
4.2 Using Concur Expense to Settle Expenses ....................... 115
4.3 Basic Configuration for Concur Expense ......................... 125
  4.3.1 Policy Group .......................................................... 126
  4.3.2 Expense Types ....................................................... 127
  4.3.3 Account Codes ....................................................... 128
  4.3.4 Forms .................................................................... 128
  4.3.5 Trip Mappings ....................................................... 130
  4.3.6 Taxation .................................................................. 130
  4.3.7 Approval Workflows .............................................. 132
  4.3.8 Compliance Controls .............................................. 134
  4.3.9 Company and Personal Mileage Rates for Cars .......... 137
  4.3.10 Employee Reimbursement ..................................... 139
  4.3.11 Company Cards ................................................... 139

5 Concur Request .............................................................. 193
5.1 Business Principles ..................................................... 194
5.2 Getting and Giving Approvals with Concur Request ......... 194
5.3 Concur Request Configuration .................................... 200
  5.3.1 Agency Proposals .................................................. 201
  5.3.2 Booking Switch ...................................................... 203
  5.3.3 Budget Insight ....................................................... 205
  5.3.4 Country Groups ..................................................... 206
  5.3.5 Event Requests ...................................................... 206
  5.3.6 Risk Management .................................................. 207
  5.3.7 Segment Types ..................................................... 207
5.4 Deploying Concur Request .......................................... 208
5.5 Integration with Concur Travel and Concur Expense ....... 210
5.6 Summary ........................................................................ 212
6 Concur Reporting .................................................................................................................. 213
   6.1 T&E Analysis vs. Concur Intelligence Tools .......................................................... 214
      6.1.1 Concur Analysis and Concur Intelligence: Shared Tools .......................... 214
      6.1.2 Concur Intelligence-Only Tools .................................................................. 216
   6.2 Using Existing Reports .............................................................................................. 217
      6.2.1 Set Reporting Preferences .......................................................................... 217
      6.2.2 Running a Standard Report ....................................................................... 220
   6.3 Building and Editing Reports in Query Studio .................................................... 224
      6.3.1 Creating a New Report ............................................................................... 225
      6.3.2 Manipulating Data within Reports .............................................................. 227
   6.4 Building and Editing Reports in Report Studio ................................................... 228
      6.4.1 Report Types and Structures ...................................................................... 230
      6.4.2 Creating a New Report ............................................................................... 231
      6.4.3 Bursting Reports .......................................................................................... 234
   6.5 Dashboards ............................................................................................................... 238
   6.6 Summary ..................................................................................................................... 239

7 Integrating Concur with Third-Party Apps and Services ........................................... 241
   7.1 The Value of Third-Party Integration ................................................................. 241
   7.2 General Configuration of Third-Party Apps and Services .................................. 242
   7.3 E-Receipt Integration ............................................................................................ 247
   7.4 Further Selected Solutions .................................................................................... 249
      7.4.1 Concur ExpenseIt ...................................................................................... 249
      7.4.2 Pivot Prime from Pivot Payables .................................................................. 252
      7.4.3 VAT IT Foreign VAT Reclamation .............................................................. 255
      7.4.4 Visage Mobile International Travel Roaming Alerts (ITRA) ....................... 258
   7.5 Summary ..................................................................................................................... 259

8 Integrating Concur with Other SAP Solutions .......................................................... 261
   8.1 Integrating with HR Master Data .......................................................................... 263
      8.1.1 Integration with SAP ERP HCM .............................................................. 263
      8.1.2 Integration with SAP SuccessFactors ......................................................... 269
   8.2 Integrating with SAP ERP Financials ................................................................. 270
      8.2.1 Financial Master Data Replication .............................................................. 271
      8.2.2 Financial Posting .......................................................................................... 274

9 Making Concur Work for You: Tips for Implementation Projects .................................. 287
   9.1 Getting Your Scope Right ...................................................................................... 287
      9.1.1 Concur Solution Scope .............................................................................. 289
      9.1.2 Project Scope .............................................................................................. 295
   9.2 Project Planning and Methodology ....................................................................... 297
      9.2.1 Concur Editions .......................................................................................... 297
      9.2.2 The Project Plan ......................................................................................... 299
      9.2.3 Tips for Project Management ...................................................................... 302
   9.3 Global Rollout ......................................................................................................... 303
   9.4 Change Management and Communication ......................................................... 306
   9.5 Typical Pitfalls ........................................................................................................ 308
   9.6 Summary ..................................................................................................................... 309

Appendices
   A Further Reading ......................................................................................................... 311
   B The Authors ............................................................................................................... 313

Index .................................................................................................................................... 315
Index

A

Account codes, 128, 274
Actionable analytics, 238
Agency proposals, 201
Airline tickets, 60
Alerts, 217
Analysis, 214
licences, 216
Approval process, 194
Approval workflows, 132
approval routing with authorization limits, 132
basic approval routing, 132
manager's manager, 133
second approver, 133
Approvals, 198
Approved senders, 157
Approvers, 266
Approving manager, 50, 120
Asia Pacific, 190
Attendee forms, 128
Attendee types, 148
Audit group, 51
Audit rules, 148
create new, 150
custom rules, 149
exception, 148
hard-stop rule, 149
random rules, 149
validation rules, 149
Australia and New Zealand, 183
e-receipts, 190
flex faring, 190
fringe benefits tax, 185
goods and services tax, 183
mixed supplies, 184
personal car mileage, 188
tax allowance, 188
travel diary, 188
Uber, 185
Australian Taxation Office (ATO), 188
Authorized approver, 158

B

Benefits in kind (BIK), 33
BI managers, 234
BIK report, 182
Booking process, 70, 73, 202
Booking switch, 203
approval, 203
criteria, 204
parameters, 204
Bring your own device (BYOD) policy, 290
Budget approvers, 205
Budget Insight, 205
Budget manager, 238
Budget threshold percentage, 239
Bursting reports, 214, 234
configuration, 235
Business travel account (BTA) card, 100

C

Canada, 170
car mileage reimbursement, 172
car expenses, 171
e-Receipt Factor, 170
taxes, 170
VAT, 170
Canceling trips, 87
Car mileage, 293
Car rental, 81, 110
agencies, 82
search results, 82
Card feed import logs, 141
Cash advance, 193
CES standard report workflow, 158
CFDI XML files, 157
Change management, 296, 306
Changing trips, 87
Expense claim (Cont.)
checks, 124
creating expenses, 118
example, 133
payment, 124
recalling, 134
status, 120
submission, 120
Expense Configuration API, 255
Expense data, 253
Expense entry, 118
Expense forms, 128, 151
customization, 129
Expense groups, 146
Expense limits, 137, 146
Expense policy, 114, 148
country assignment, 137
create new, 143
Expense process, 113
Expense processor, 122
Expense report, 132, 279, 294
sent for payment, 279
Expense Report API, 255
Expense role, 54
Expense types, 118, 126, 127, 129, 145, 197
configuration, 127, 145

G
Germany, 177
BIK Report, 182
deductions, 180
M-report, 182
new expense claim, 178
overnight allowance, 179	hree-month rule, 183
travel allowances, 178
Ghost card, 100
Global distribution system (GDS), 60
Global rollout
country tiers, 305
plan, 304
Goods and services tax (GST), 170
Google Maps, 138
Group configurations, 146
GSA rates, 169
Guest booking, 291

H
Hierachy levels, 272
Hotels, 76, 109
map, 77
rates, 77
reservation, 80

I
Implementation project, 287
common pitfalls, 308
global rollout, 303
Infotype 2010, 283
Internal orders, 271
International Travel Roaming Alerts (ITRA), 258
Internet of Things (IoT), 26
IRS rules, 169
Itemizing expenses, 252

J

K
Key performance indicator (KPI), 35, 217
Leakage, 88
Legacy system, 290
Legacy System Migration Workbench (LSMW), 284
Line manager, 265
List management, 121
List report, 225
Localization, 153
Lowest logical fare (LLF), 103

L
Management reporting, 257
Mapping concept fields, 155
Master data
financial, 270
human resources, 263
replication, 271
SAP ERP HCM, 265
Mileage calculator, 138
Mileage expenses, 135
Mileage reimbursement, 137
Mixed supply purchase, 184
My Travel Network service, 89

M
Map
miles, 77
Milestone, 297
Mileage calculator, 138
Mileage expenses, 135
Mileage reimbursement, 137
Mixed supply purchase, 184
My Travel Network service, 89

N
Network activities, 271
Network economy, 241
Networks, 271

O
OANDA rates, 155, 254
Optical character recognition (OCR) technology, 257
P
Paper receipts, 22, 251
Paper-free, 297
Partner application, 255
Payment batches, 163
Payment Manager, 168
Payment methods, 114
Payment types, 148
Payroll in SAP ERP HCM, 51, 182, 282
import data, 283
Penny test, 163
Permissions, 53
role assignment, 53
tips, 55
Personal credit cards, 47
Personal information, 45
addresses and contact data, 46
e-mail address, 46
full name, 46
organizational assignment, 46
phone numbers, 46
Pivot Payables, 252
Pivot Prime, 252
billing statements, 253
currencies, 254
integration, 252
report, 252, 254
Planned vs actual spending, 194
Policy group, 126
assignment, 126
Preferred vendors, 106, 107
Pretrip approval, 34
Project management tips, 302
Project plan, 299
analysis and design, 301
go-live, 302
onboarding and kickoff, 300
test and validation, 301
Project planning, 297
Project schedule, 300
Project scope, 288, 295
change management, 296
contract, 295
side projects, 296
Project timeline, 300
Provincial sales taxes (PSTs), 170
Purchasing cards (P-cards), 100

Queries, 230
Query Studio, 215, 224
queries, 230
Query Studio, 215, 224
Organizational Management, 265
secure connection, 264
SAP Fieldglass, 285
SAP General Ledger (G/L), 275

Replication, 273
Remote function call (RFC), 264
Relational reports, 230
Regional hotel rates, 98
Reclaim rate, 130
Reclaim code, 131
Receipts, 251
Receipt type, 124
Receipt limits, 156
Receipt handling, 136, 156, 157
Rule classes, 50, 91
uses, 92

Sales order items, 271
SAP Ariba, 285
SAP Business One, 285
SAP Cloud Platform Integration, 264
SAP Customer Relationship Management (SAP CRM), 299
SAP ERP Financials, 270
Accounts Payable, 282
cost hierarchy, 276
integration features, 280
duplicate systems, 262
SAP ERP Financials Travel Management (FI-TV), 39
SAP ERP HCM, 43, 263
data integration, 267
direct connection, 264
HR data integration, 265
integration, 263
integration features, 268
middleware, 264
Organizational Management, 265
secure connection, 264
SAP Fieldglass, 285
SAP General Ledger (G/L), 275
SAP Process Integration (PI), 264
SAP Process Orchestration (PO), 264
SAP S/4HANA Cloud, 285
SAP S/4HANA Finance, 285
SAP SuccessFactors, 299
file export, 269
integration events, 269
report, 269
SAP SuccessFactors Employee Central, 263, 269
SAP system ID, 276
SAP Travel Management, 43, 284
Scope, 287, 300, 303
fixed implementation price, 289
sizing, 289
SeatID, 242
Segment type, 204, 207
Selections criteria, 224
Self-booking, 205
Self-registration, 56
Settling expenses, 115
Single sign-on (SSO), 302
Self-registration, 56
Standard reports, 217
running, 220
System settings, 44
accessibility mode, 44
notification preferences, 44
T&E problems, 67, 95, 103, 209, 297
T&E problems, 17
ineffective management, 19
T&E problems (Cont.)
inefficiency, 18
user experience, 20
T&E process goals, 21
automated, 24
connected, 25
ease of use, 26
mobile, 24
paper-free, 22
T&E vision statement, 26
Target group, 54
Tax authority, 130
Tax condition, 130
Tax groups, 130
Tax information, 123
Tax rate, 130
Tax reclaim, 123
Taxes, 130, 306
Test instance, 308
Third-party apps, 241
configuration, 242
connecting, 243
connecting to user account, 248
deactivation, 245
duplicate accounts, 247
Third-party services, 242
benefits, 242
configuration, 242
Train bookings, 69
Training and user documentation, 307
Transaction CRE_SETUP, 265, 271
Transaction CTE_MONI, 267
Transaction CTE_SETUP, 263, 270, 277
Travel alerts, 258
Travel management, 101
Travel management company (TMC), 20, 47, 61, 203
Travel preferences, 46
Travel Rule Builder, 94
Travel rules, 92
Travel vendor exclusions, 98
Travel Wizard, 55, 67, 76, 203
Travelfusion, 62
Trip itinerary, 258
Trip mapping, 130
Index

**U**
- Uber, 243
- United Kingdom, 172
  - fuel for mileage, 173
  - gifts, 175
  - incidentals, 175
  - P11D reporting, 175
  - receipts, 172
  - taxi fares, 177
  - VAT invoices, 176
  - vehicle hire, 177
- United States, 169
- Update Expense Reports Imaging API, 255
- User account, 43
- User administration, 48
  - account termination, 49
  - general settings, 49
- User creation, 57
  - automated file transfer, 57
  - templates, 57
- User experience (UX), 17

**V**
- Value-added tax (VAT), 19, 123
  - refund, 247
- VAT IT, 255
  - dashboard, 257
  - integration, 255
  - reclaim amounts and claims, 256
  - user record, 255
- Visage Mobile, 258
  - integration, 258

**W**
- WBS elements, 271, 277
- Web services, 29
  - permissions, 245
Sven Ringling is a consultant and the UK director of iProCon (www.iprocon.com), an SAP SuccessFactors, SAP ERP HCM, and Concur consulting partner. He works with large and medium-sized organizations to drive digital transformation and to optimize HCM, payroll, and T&E processes. He is the author of two editions of Mastering HR Management with SAP ERP HCM and an SAP Mentor.

Hannah Smith is a principal Concur and payroll consultant at iProCon. She has nine years of experience working with a range of customers across various industries and locations on the core HCM modules and is iProCon’s Concur SME for the UK.

Andy Wittmann is a senior consultant and the director of Global Services at Lyndon Group. His responsibilities include all aspects of global services, from implementations to helping organizations improve their overall travel and expense programs on an international scale. He brings extensive experience to all his clients, having deployed Concur Travel, Concur Expense, and Concur Invoice for clients in North America, South America, Asia, Europe, and the Middle East. He has more than 15 years of experience in consulting, technology, and project management. He leverages his technical, process development, and Concur expertise to create optimal solutions for clients.

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