Shared: Concept Fields for Analysis/Intelligence

Setup Guide

Last Revised: September 21 2015

Applies to these SAP Concur solutions:

- ☒ Expense
  - ☒ Professional/Premium edition
  - ☐ Standard edition
- ☐ Travel
  - ☐ Professional/Premium edition
  - ☐ Standard edition
- ☒ Invoice
  - ☒ Professional/Premium edition
  - ☐ Standard edition
- ☐ Request
  - ☐ Professional/Premium edition
  - ☐ Standard edition

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Revision History

Date	Notes/Comments/Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
February 11, 2019	Updated the copyright; no other changes; cover date not updated
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 5 2018	Updated the copyright; no other changes; cover date not updated
December 14 2016	Changed copyright and cover; no other content changes.
October 27 2016	Updated the guide content to new corporate style; no content changes.
September 21 2015	9 fields now available
April 10 2015	Changed the name of Concur Insight is now Analysis/Intelligence Removed information about the two user interfaces Changed the copyright No other content changes
October 3 2014	Added information about the two user interfaces; no other content changes
March 5 2014	Noted that the name of Analysis/Intelligence is now Concur Insight; no other content changes
January 23 2014	Cover and copyright changes; no other content changes
December 28 2012	Made rebranding and/or copyright changes; no content changes
January 20 2012	Addition of four new Concept fields and update of screenshot to match
December 31 2010	Updated the copyright and made rebranding changes; no content changes
December 2009	Changed to stand-alone setup guide; no content change
August 21 2009	Initial publication

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Concept Fields for Analysis/Intelligence

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (view but not create or edit).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's Concur administrator.

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by Concur. In this case, the client must initiate a service request with Concur Client Support.

Section 2: Overview

Use this feature to map client Org Unit and Custom fields to one of the "concepts" that are common across most businesses. The concepts that have been identified are:

- Division
- Department
- Business Unit
- Cost Center
- Project
- Company
- CRM Opportunity (Salesforce Connector)
- CRM Account (Salesforce Connector)
- CRM Event (Salesforce Connector)

Once the concept has been mapped to specific Org Unit and Custom fields, the Data Warehouse Expense Archive populates the information in the Reporting Database. The same concepts are then available in the Concur Data Warehouse Model to be added to custom reports. This allows report writers to create reports (in Query Studio or Report Studio) with these concepts without having to know the actual Org Unit or Custom field names.

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Availability

This feature is used ***only*** by clients who use:

- Analysis/Intelligence
  – ***and*** –
- Expense and/or Invoice

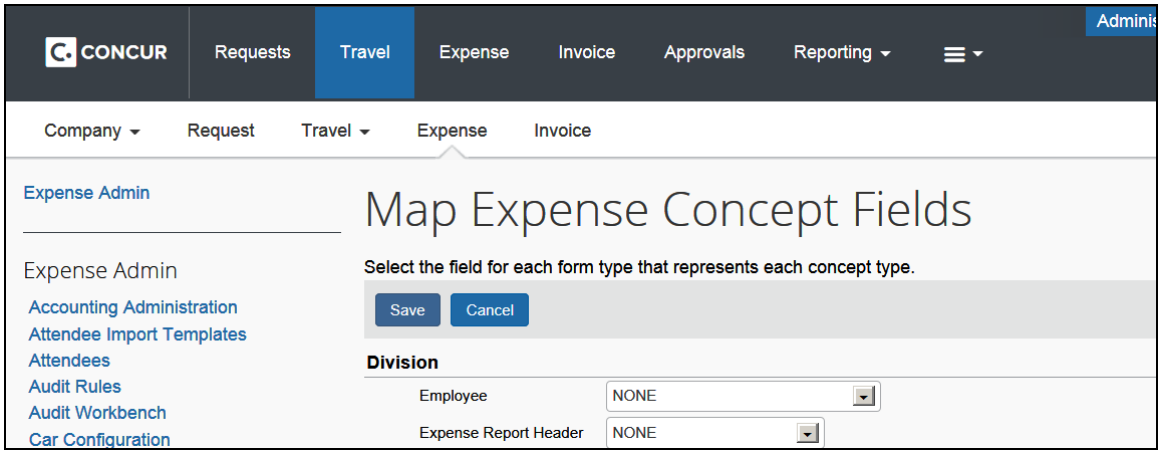
NOTE: This feature does not apply to Travel at this time.

Section 3: Mapping the Fields

The mapping process and results are identical for Expense and Invoice.

To access the mapping page:

Click **Administration** > **Expense** > **Map Expense Concept Fields** (left menu).



NOTE: Use the Invoice Admin menu for the Invoice mapping.

To map the fields:

1. For each of the concepts (Division, Department, etc.), select the employee field, report header field, expense field, and / or expense allocation that best matches the concept for your company.

2. Click **Save**.

Note the following:

- Concept field mappings are not immediately available in the Reporting Database. An archive must run before this information can be utilized.
- You cannot change the name of the concept fields. Report creators can, however, change the label names on any report they create.

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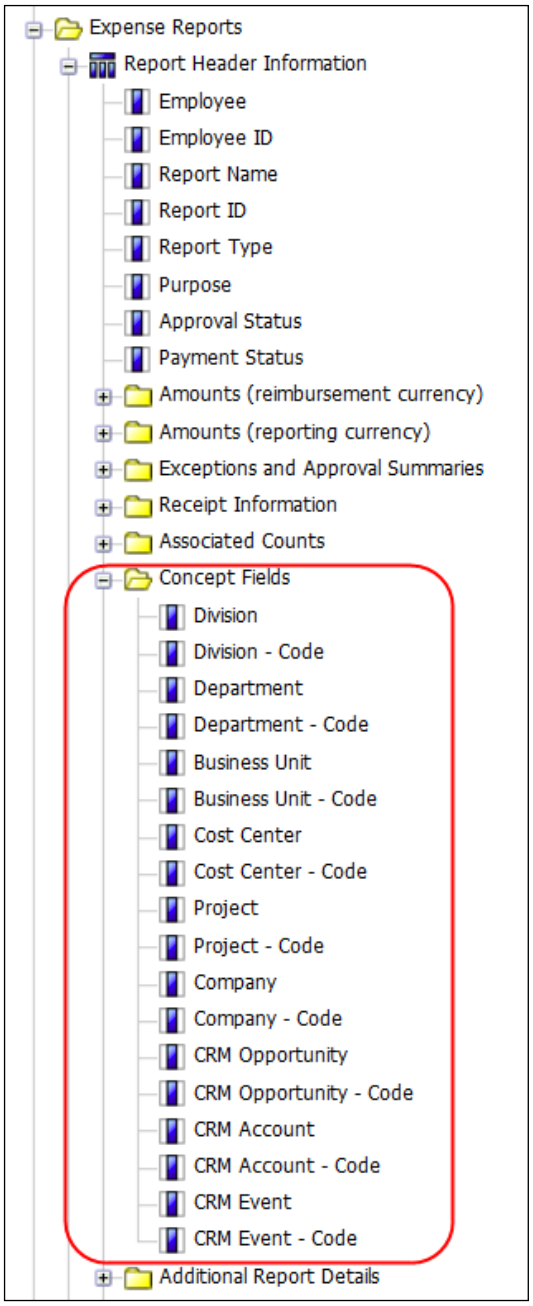
Section 4: Using the Concept Fields in the Model

Once the concept fields have been mapped and an archive has been successfully run, the report writer can add each concept to a report by simply selecting the concept. For example, if a report writer wants to add the Business Unit concept at the report header level, they would navigate to concept field within the model and add to the report.

Note that each "concept" has two fields – one for *name* and one for *code*.



Expense Folder

They are located in 4 places in the Expense folder.

- These 3 folders:
  - Expense > Expense Reports > Report Header Information > **Concept Fields**
  - Expense > Expense Reports > Entry Information > **Concept Fields**
  - Expense > Expense Reports > Expense Allocation > **Concept Fields**
- These fields within this folder: From **Employee Division** to **Employee Project - Code** in Expense > Expense Reports > Report Header Information > Additional Employee Details

Invoice Folder

They are located in 4 places in the Invoice folder.

- These 3 folders:
  - Invoice > Payment Request Header Information > **Concept Fields**
  - Invoice > Payment Request Line Items > **Concept Fields**
  - Invoice > Payment Request Allocations > **Concept Fields**
- These fields within this folder: From **Employee Division** to **Employee Project - Code** in Invoice > Payment Request Header Information > Additional Employee Details

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