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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Concept Fields for Analysis/Intelligence

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.
Section 3: Mapping the Fields

Availability

This feature is used only by clients who use:

- Analysis/Intelligence
- 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.

1. **To access the mapping page:**

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

![Map Expense Concept Fields](image)

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

1. **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.
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