

WEBINAR KEY LEARNINGS

Demystifying Expenses Reporting: Future proof your processes and reporting with Assure Expenses



GETTING BACK TO BASICS

How can Assure Expenses support your internal reporting?

Assure Expenses has an extensive reporting suite existing within the software. The reporting suite allows you to create simple reports at the click of a button to support your internal reporting, such as your highest claims. The suite also allows you to customise reports and create your own where needed.

Following our recent webinar, we've put together a short Q&A document to support your reporting capabilities within Assure Expenses.



Q&A

Do the reports run in real time?

How can I make my report always show the information for the last month, without having to change the report filters each time I want to run the report? You can add a filter for “Last Month”

How can I create a report that always asks me to choose the date range when I run the report?

If you add a field as a report filter, you can specify the criteria but select this to be chosen at run time:

Filter Detail: Date of Expense

Filter criteria* ?

I'll decide when I run the report

Q&A

What's the difference running a report and a financial export?

When you run a report for expenses items from the Reports area of Assure Expenses, it will include ALL claims in the system that match the criteria set by the filters.

When you specify a report for expenses items as a financial export and run an export from the Financial Exports area of Expenses, it will include ALL claims in the system that have been approved since that last export.

In this way the payment file only ever includes newly approved claims and claims cannot be paid more than once.

Q&A

Can an exported report be sent to an FTP site for collection?

Yes. Create the report you need then schedule it for export.

The delivery method can be selected as FTP Server and the relevant details can then be provided:

Scheduled Reports

Scheduled Reports

General Details

Output Type:

Delivery Method:

Email message body

FTP Address:

Username:

Password:

Use Secure Connection (SSL)?

Start Date:

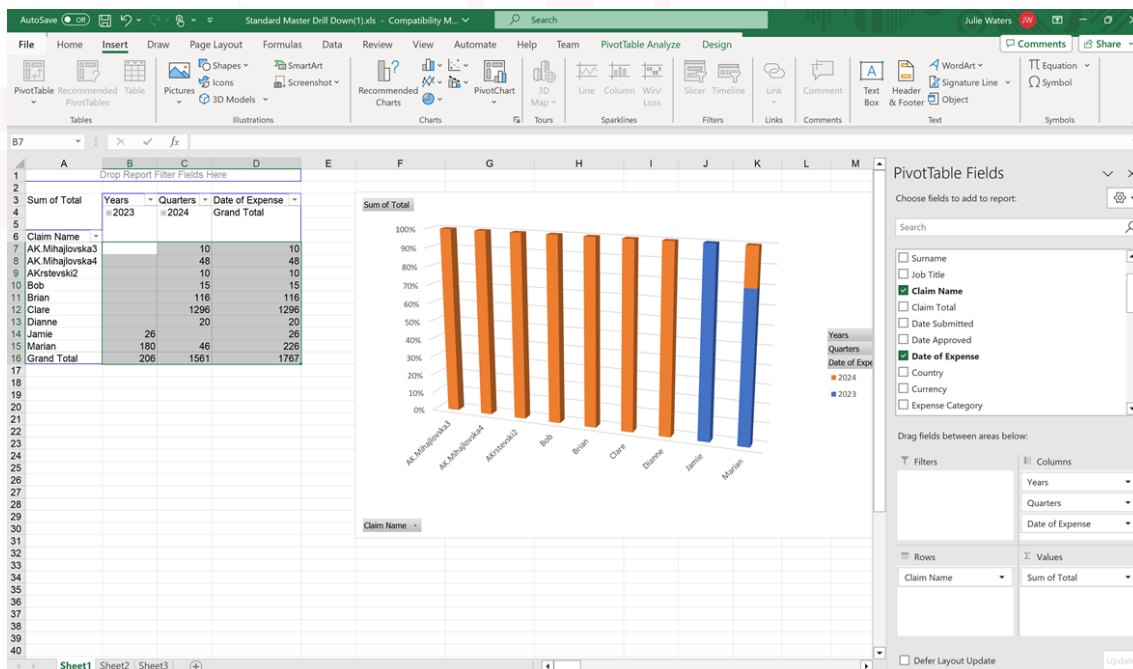
End Date:

Q&A

Can I create charts from the reports?

Yes, if you export the report to Pivot Chart you can pivot the data in Excel and create the charts you want.

We would recommend exporting the master drill-down report using the pivot option and choosing the date range you require. You can then use the data to create the chart(s) you want as per the following example:



Continue the conversation

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