Common Report Examples

Permissions

You will require an Access Role with the following permissions:

- Reports

Each of the reports below are commonly used by our customers so we thought we would put them together in one place to make it easier for you to browse and see if they will be useful for your organisation. Below you will find information about the report columns and criteria required but it will be beneficial to view Create a Report for more general information regarding report creation.

Mileage VAT Reclamation

1. Navigate from the homepage to **Reports**. Click on the 'Category' menu and select 'Audit & Compliance' from the list.

2. Click **Mileage VAT Reclamation**.

3. A new browser tab will open and display the 'Enter Filter Details' section. Enter the dates you wish to filter between and then click **save**.
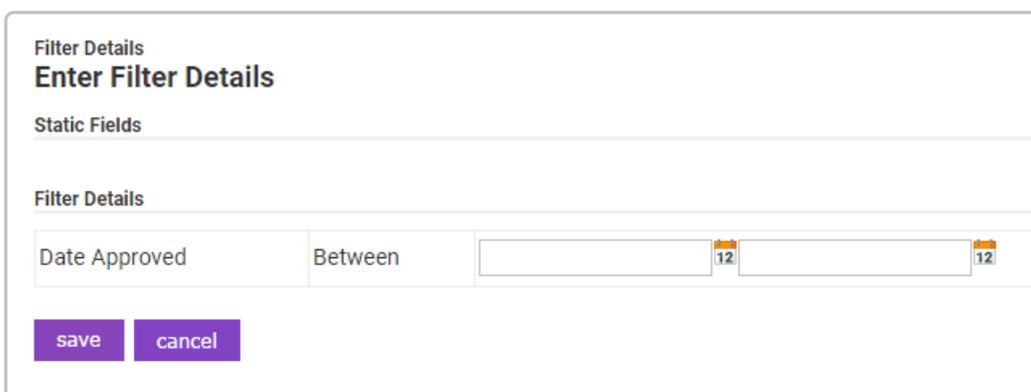
4. A list of claimants who have incurred mileage will appear, displaying the amount of VAT that is reclaimable for each claimant.

View Report
Mileage VAT Reclamation
Report Filter (Double click to expand)
Drag a column header here to group by that column

Username	Total Potential VAT	Total Reclaimable VAT
158293	0	0.00
166198	0	0.00
167183	0	0.00
171299	0	0.00
AlexE	0	0.00
AzureESRV1	0	0.00
AzureESRV2	0	0.00
Claimant.143952	0	0.00
Claimant-Corry	0	0.00
Julie	11.57	0.00
Matt	0	0.00

This will allow you to see how much VAT you can claim back on the mileage incurred by claimants, in accordance with the HMRC 6th VAT Directive.

Total Mileage for an Employee (Date Range)

1. From the General Details tab, select **Expense Items** to report on.

2. Navigate to the Columns tab and then drag **Username**, **Number of Miles** (Mileage Details) and **Total** into the Preview section. This will create 3 report columns.

3. Click ⚙ on the 'Number of Miles' column and then click **Sum**.

4. Click ⚙ on the 'Total' column and then click **Sum**.

5. Drag the following fields into the Filters section:

Field	Filter Criteria	Value
Number of Miles	Contains Data	
Calculate Mileage Total	Equals	Yes
Expense Item	Equals	Click ➕ next to each mileage expense item that you want to report on.
Date of Expense	Select the date range that you want to report on. In this example, we selected dates before 01/03/2021. **Tip:** Select the 'I'll decide when I run the report' check box to specify the date range when you run the report. This is useful if you use the report often and report on different date ranges.	

		⊙≡	And/Or	Column	Filter Criteria	Value
📝	✖	☐		Claim Submitted	Equals	Yes
📝	✖	☐	And	Claim Paid	Equals	Yes
📝	✖	☐	And	Number of Miles	Contains Data	
📝	✖	☐	And	Expense Item	Equals	Mileage
📝	✖	☐	And	Date of Expense	Before	01/03/2021
📝	✖	☐	And	Calculate Mileage Total	Equals	Yes

Preview

Drag a column header here to group by its column

⚙ Number of Miles	⚙ Total	⚙ Username
22.00	£7.70	stuartdi
26.60	£9.31	stuartdi
85.30	£25.59	Debs
192.00	£71.81	lynne
314.40	£117.58	lynne
17.00	£5.28	greg
28.00	£11.20	greg
4.90	£1.96	greg
10.50	£7.35	greg
381.10	£152.44	greg

This provides us with the total number of miles reimbursed for each employee before 01/03/2021 as well as the total reimbursed value of that mileage.

Active Users

1. From the General Details tab, select **Claims** to report on.

2. Navigate to the Columns tab and then drag **Date Submitted** and **Username** into the Preview section. This will create 2 report columns.

3. Drag **Date Submitted** into the Filters section and set the Filter Criteria to the time period that you want to report on. In this example, we are reporting on claims submitted by employees before 01/03/2021.

> **Tip:** Select the 'I'll decide when I run the report' check box to specify the date period when you run the report. This is useful if you use the report often and report on different date periods.

4. Drag the **Username** field to the 'Drag a column header here' area above the report to group the data. This will then display a list of employees and each of the claims that they have submitted in the last 3 months.

		And/Or	Column	Filter Criteria	Value
Filters ▼					
📝 ❌ ☐			Date Submitted	Before	01/03/2021

Preview

Username ∧	
⚙ **Username** ∧	⚙ **Date Submitted**
◢ Username: Adele - 7 items	
Adele	09/12/2015
Adele	09/05/2007
Adele	10/12/2008
Adele	10/12/2008
Adele	10/12/2008
Adele	07/06/2013
Adele	07/05/2009
◢ Username: Admin10 - 3 items	
Admin10	25/05/2006
Admin10	24/01/2007
Admin10	05/03/2007

This provides us with a list of employees who have submitted a claim in the last 3 months. Each employee can be expanded to show the individual claims which have been submitted.

Claims in a Date Range

1. From the General Details tab, select **Claims** to report on.

2. Navigate to the Columns tab and then drag **Claim Number** into the Preview section. This will create a single report column.

3. Drag **Date Submitted** into the Filters section and set the filter criteria to **Between**. You can then set the date range for the report data.

> **Tip:** Select the 'I'll decide when I run the report' check box to specify the date period when you run the report. This is useful if you use the report often and report on different date periods.

4. Add a **Count** to the Claim Number column.

This provides us with the number of claims that were submitted between 01/01/2017 and 01/01/2018 which was 6.

Total Spend in a Date Range

1. From the General Details tab, select **Expense Items** to report on.

2. Navigate to the Columns tab and then drag **Total** into the Preview section. This will create a single report column.

3. Click ⚙ on the 'Total' column and then click **Sum**.

4. Drag **Date of Expense** into the Filters section and then set the Filter Criteria to **Between**. You can also replace Date of Expense for a different field, such as Date Approved, depending on your preferences.

> **Tip:** Select the 'I'll decide when I run the report' check box to specify the date period when you run the report. This is useful if you use the report often and report on different date periods.

Filter Detail: Date of Expense

Filter criteria*	Between ▾ ?
I'll decide when I run the report	☐
Date 1*	01/01/2021 📅 ?
Date 2*	01/03/2021 📅 ?

save **cancel**

Filters ▼

			And/Or	Column	Filter Criteria	Value
📝	✖	☐		Claim Submitted	Equals	Yes
📝	✖	☐	And	Claim Paid	Equals	Yes
📝	✖	☐	And	Date of Expense	Between	01/01/2021 and 01/03/2021

Preview

Drag a column header here to group by its column

⚙ Σ **SUM of Total**

£3,421.43

> This provides us with the total reimbursement for expense items between 01/01/2021

and 01/03/2021.