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# Revision History

| Date | Notes / Comments / Changes |
|---|---|
| January 21, 2022 | Updated the copyright year; no other changes; cover date not updated |
| February 20, 2021 | Updated the copyright year; no other changes |
| October 17, 2020 | Removed the *Dashboard: Hotel Vendor Normalization Analysis* section. As of the October 2020 release, the Hotel Vendor Normalization Analysis report was removed from the standard reports catalog. |
| January 8, 2020 | Changed copyright; no other content changes |
| February 9, 2019 | Removed references to Insight Premium from the guide and updated copyright |
| January 13 2018 | Changed copyright; no other content changes |
| December 15 2016 | Changed copyright; no other content changes |
| Novebmer 17 2016 | Updated report images to match the current application |
| February 22 2016 | Updated:<br>• Finance & Spend Overview<br>• Operational KPI |
| September 18 2015 | Changed the chapter number; no other content changes |
| August 14 2015 | Moved from single book to individual "chapters" – no content changes |


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# Chapter 17: Folder – Premium Dashboards

## Sub-folder: Actionable Analytics

Refer to these Actionable Analytics chapters in the Analysis/Intelligence guide.

## Dashboard: Executive Overview

Available to: ☐ Analysis ☑ Intelligence

| | |
|---|---|
| **Data Type:** | Paid Expense Data, Expense Workflow Information |
| **Spend Type:** | Approved Amount (rpt), Accrual Amt |
| **Date Fields:** | Various |
| **Unique Data:** | N/A |

### Description

This dashboard focuses on the five key areas of interest for finance and expense managers. They are:

- Operations
- Spend management
- Commodity management
- Administration
- Departmental review

The main landing page of this dashboard provides a snapshot into each of those areas with some key metrics associated with spend trending, expense time tracking, commodity breakout, etc. By clicking any of the five panels, more details appear – focusing on additional trending for each of the metrics on the landing page.

The icons in the left column can be used to navigate between the detailed metrics.

### Value Proposition

This dashboard looks at the five key areas of importance for a finance and/or expense administrator.

#### *Operational Overview*

The **Operational Overview** portion allows dashboard users to quickly evaluate the four key metrics and analyze if they are in alignment with the previous period. Dashboard users can quickly view the red and green arrows – and then spend their time focusing on the areas in need of improvement instead of those areas that are trending correctly.


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By tracking metrics – like time to submit and spend on card – management can help drive messaging and changes within their program that will help alleviate liability and drive savings through their incentive or rebate programs.

The drilldown view provides actionable information around approvers who are not responding in a timely manner and travelers who are slow to submit their expense reports. The longer it takes to expense card transactions or out-of-pocket transactions, the longer it takes to hit the P/L. This causes cash flow issues and a higher likelihood the travelers will default or incur card late fees on these transactions.

### *Spend Analysis*

The **Spend Analysis** portion provides a quick comparison of spend between the previous year and the trend of the current year. It quickly allows the dashboard user to compare current spending against the previous year's spend. The graphs provide quick visual cues to determine whether spending spikes are occurring or whether overall spend is trending up or down.

The drilldown view provides the trending information for each year included in the report – giving visibility into three metrics: spend, the number of transactions, and cost per transaction. This allows dashboard users to understand fluctuating travel spend. Are travelers spending more? Are they traveling more? Is the increase based on traveler behavior or is the industry driving up the cost per transaction? Is spend up while the number of transactions is trending down?

### *Expense Categories*

The **Expense Categories** portion is useful to understand commodity management and vendor relationships. The summary page gives a quick graphical view of the top commodities (expense categories) that account for most of the client's spend.

By clicking the graph, the detail page appears. This allows dashboard users to select the categories – one at a time – to understand the vendor footprint. This information identifies the areas that might be of value to try and negotiate a lower or discount rate with that supplier.

### *Administration*

The **Administration** portion focuses on three key administrative metrics.

- **Cards not Assigned:** It shows the number of new travelers who do not yet have an expense profile. There is a potential liability for those expenses not getting paid for that travelers.
- **% of Employees Submitting Reports:** It shows the number of travelers that have submitted an expense report vs the total number of employees in the company – giving visibility into the percentage of the employee base that is traveling during that time period.
- **Average Reports (Employee):** It shows the average number of reports per employee being submitted. Assuming the number of travelers is known, this metric can be used to identify overage situations against the clients contractual tier.


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### *Departments*

While it is important to identify individual travel details, understanding how expenses are distributed across organizational departments is also critical. The **Departments** portion provides a breakdown of each of the departments based on size. Clicking each of the circles gives a view into the top spenders by department and the key spend statistics.

## Dashboard Output

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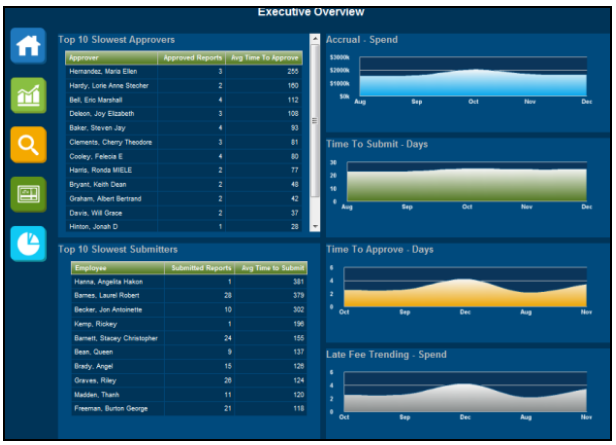


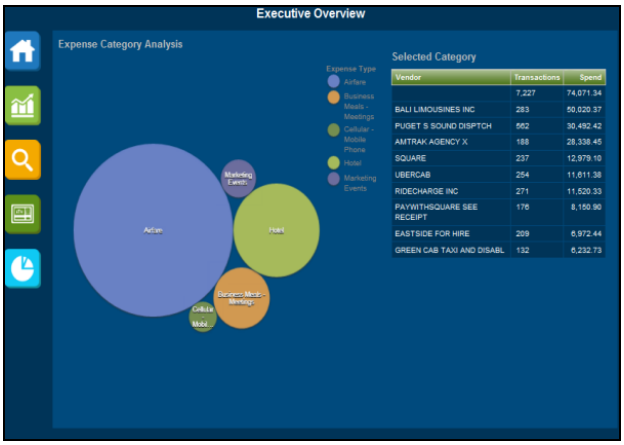



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# Dashboard: Expense Spend Summary

Available to: ☐ Analysis ☑ Intelligence

| | |
|---|---|
| **Data Type:** | Paid Expense Data – Parent Entries & Personal Entries Excluded |
| **Spend Type:** | Approved Amount (rpt) |
| **Date Fields:** | Expense Transaction Dates |
| **Unique Data:** | N/A |

## Description

This dashboard shows a client's expense data in two distinct views: Region/Country or Category/Type.

- The **Region** button (top of the page) provides an overview of spend and expense transactions for all regions. The graphs on the right side of the page are stacked bar graphs that show the regional breakdown for the four quarters of the selected year (shown at the top of the report).
  - By clicking the quarters on the graph, the data in the charts change to reflect the spend and transactions for the selected quarter.
  - By clicking the region name in the charts, the data and graphs change to show a country-by-country breakdown within the selected region.
- The **Category** button (top of the page) provides an overview of spend and expense transactions for all spend categories. The graphs on the right side of the page are stacked bar graphs that show the category breakdown for the four quarters of the selected year (shown at the top of the report).
  - By clicking the quarters on the graph, the data in the charts change to reflect the spend and transactions for the selected quarter.
  - By clicking the category name in the charts, the data and graphs change to show an expense type breakdown within the selected category.

## Value Proposition

This dashboard serves several purposes for several users within an organization:

- Expense administrators receive a consolidated view of the roll-up between regions/countries and categories/spend types. They can use this data to determine if there are configuration adjustments that need to be made to provide better visibility and insight around the budget or around commodities that the business is managing.
- Budget owners and travel/expense managers can access data related to common T&E questions like:
  - How much did we spend in x country or region? How does that compare to last quarter?
  - We put a travel freeze in place in October. Is our spend in the key T&E categories trending downward?


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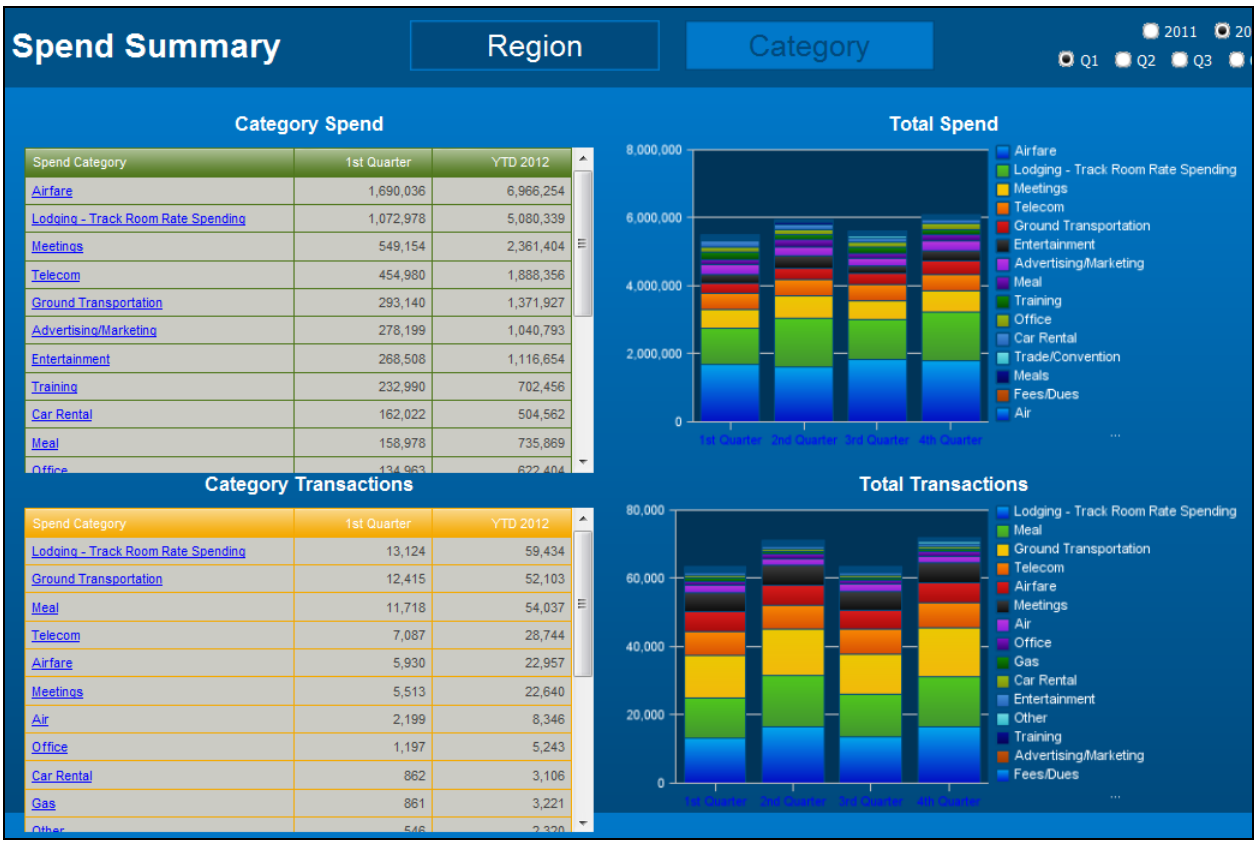
- What is the company spend in a particular category type? How did we do last year in the same?

## Dashboard Output





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# Dashboard: Finance & Spend Overview

Available to: ☐ Analysis ☑ Intelligence

| | |
|---|---|
| **Data Type:** | Paid Expense Data |
| **Spend Type:** | Approved Amount (rpt) |
| **Date Fields:** | Expense Transaction Dates |
| **Unique Data:** | N/A |

## Description

This dashboard looks at the top expense categories for a client in a clean and succinct manner. The top four categories are displayed for the client with the yearly trending of spend based on the current year (shown at the top of the page). The remaining categories are rolled into All Other Categories. The dashboard also shows the quarterly spend, yearly spend, and comparison to last year's spend for each of the commodities.

Clicking the green arrows on the left side of the page expands the four main category sections to show additional yearly tending for transaction count and the cost per transaction for the commodity. It also displays the top suppliers and the top employees who are spending money for each commodity.

The data and trends can be displayed by year and subsequently by quarter.

## Value Proposition

This dashboard displays the top expense categories for a client and answers questions like:

- What is going on?
- Why is it going on (what / supplier)?
- Once I understand *what* and *why*, then *how* can I effectively make changes (who)?

The ***what*** is answered in the top level of each category.

> Example: How are our T&E expenses trending? What did we spend? How does this relate to the previous period? Is our spending out of control?

The ***why*** is answered in the expanded trending and supplier detail.

> Example: Spend is going up – not because we are taking more air trips or staying at more hotels; those transactions are flat – but the cost per transaction is going up. That tells me that the industry costs are escalating; the increase I see is not a result of employee behavior.
>
> Example: I can see that the average cost with our preferred car rental company went down in Q4 right at the time we negotiated new rates. Despite the increase in rental


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transactions, the overall spend in that category has decreased compared to the previous quarter.

The ***change*** involves evaluation at the employee level to identify areas of opportunity – either with re-education, training, or policy modifications.

Example: Our average cost per transaction in the hotel category is $82 for the quarter. However, our top 20 spenders in this area spend an average of $250 per stay. We need to re-educate travelers about preferred programs and per diem limitations – especially our key offenders.

## Dashboard Output

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# Dashboard: Operational KPI

Available to: ☐ Analysis ☑ Intelligence

| | |
|---|---|
| **Data Type:** | Expense Workflow Information |
| **Spend Type:** | Approved Amount (rpt) |
| **Date Fields:** | Various |
| **Unique Data:** | N/A |

## Description

This dashboard provides an overview to key operational performance metrics every expense administrator uses to track the basic health of their program. There are four key metrics outlined in this report. They each show the current status of the metric compared with the year and quarter combinations selected for the dashboard (top of the page). Each metric can be viewed as a trending graphical chart, employee-level details, or the basic KPI comparison metric.

## Value Proposition

This dashboard allows dashboard users to quickly evaluate the four key metrics and analyze if they are in alignment with their previous period. Dashboard users can quickly view the red and green arrows – and then spend their time focusing on the areas in need of improvement instead of those areas that are trending correctly.

By tracking metrics – like time to submit and spend on card – management can help drive messaging and changes within their program that will help alleviate liability and drive savings through their incentive or rebate programs.

The drilldown view provides actionable information around approvers who are not responding in a timely manner and travelers who are slow to submit their expense reports. The longer it takes to expense card transactions or out-of-pocket transactions, the longer it takes to hit the P/L. This causes cash flow issues and a higher likelihood the travelers will default or incur card late fees on these transactions.


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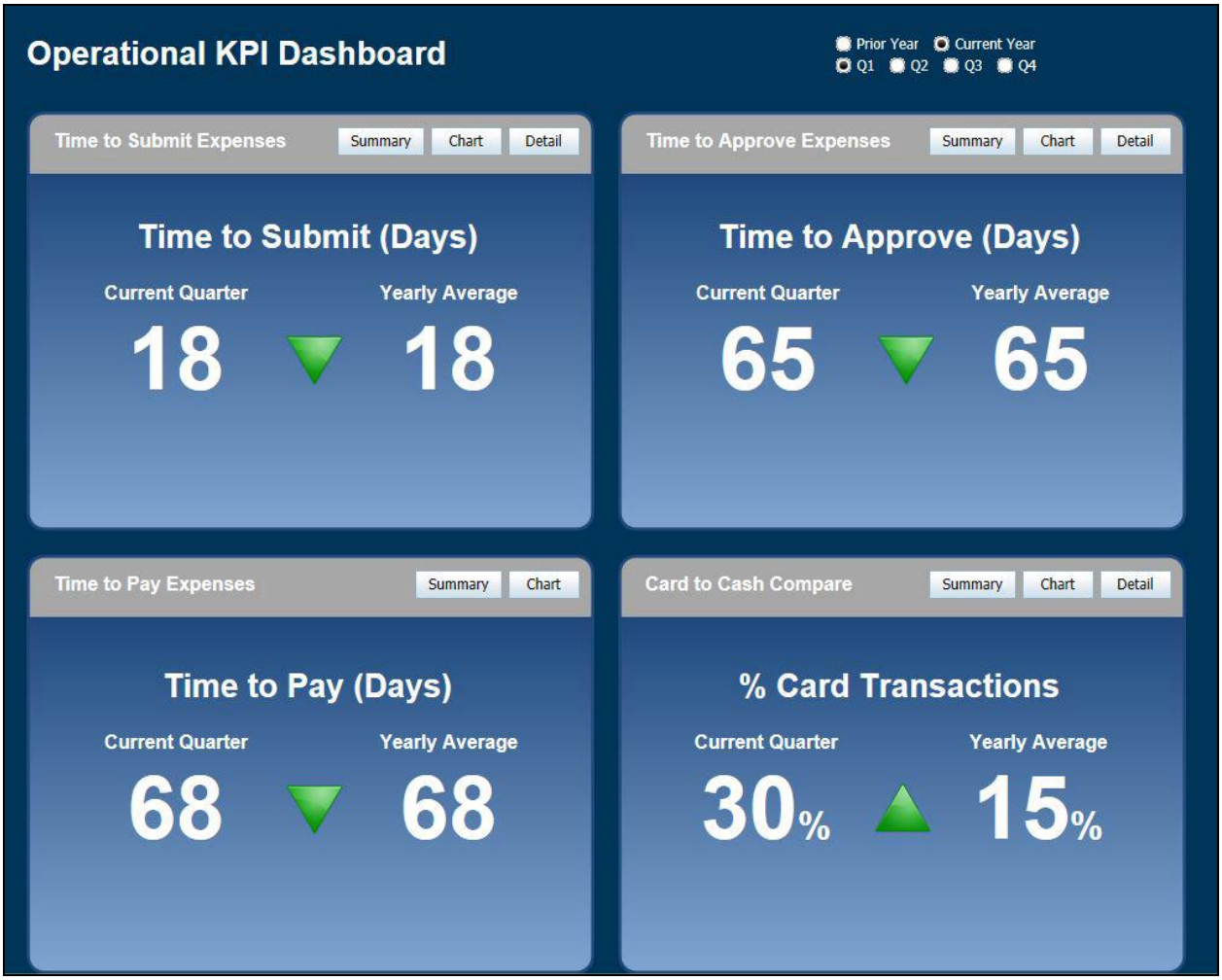
## Dashboard Output





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# Dashboard: Travel Market Analysis

Available to: ☐ Analysis ☑ Intelligence

| | |
|---|---|
| **Data Type:** | Concur Travel & Agency Data |
| **Spend Type:** | Reserved / Booked Amount |
| **Date Fields:** | Travel Invoice Dates |
| **Unique Data:** | N/A |

## Description

This dashboard allows travel and procurement managers to quickly view and evaluate the travel footprint of their company, how spend is trending, where people are going, and with which vendors.

The dashboard data can be filtered for specific years and quarters. The basic commodity types of air, rail, car, and hotel are summarized across the selected years and quarters.

The graphs show the trending of cost, tickets, and average cost per transaction (booking, ticket, reservation). By clicking a market pair or city (depending on commodity viewing) in the upper table, the top suppliers within that market or segment pair displays in the lower table.

## Value Proposition

This dashboard provides visibility into the vendor footprint and allows managers to understand where they might be able to successfully negotiate their vendor relationships.

It is important for managers to understand the trending of spend versus the number of tickets to distinguish between an industry trend (if the average ticket cost is increasing) or if the company is taking more air trips (and spending more). The market pair list allows managers to truly understand where their travelers are flying – not just at the ticket level but at each key segment.

The segment breakdown shows whether the negotiated vendors are being utilized and the value is achieved. This information can be used to either negotiate with those suppliers that meet their footprint or change internal behavior and manage configurations to drive spend to those preferred suppliers.

The same concept applies to the hotel and car commodities but the review is based on room nights and rental days.


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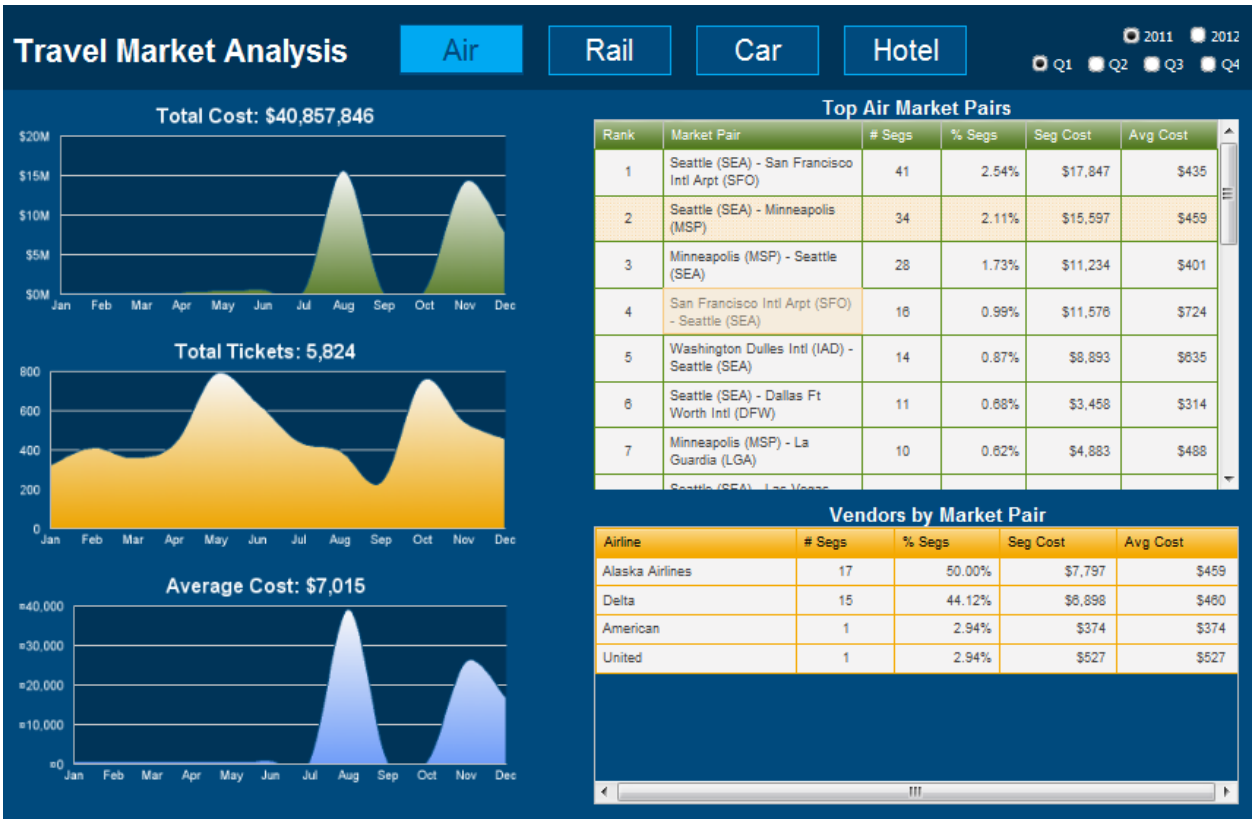
## Dashboard Output





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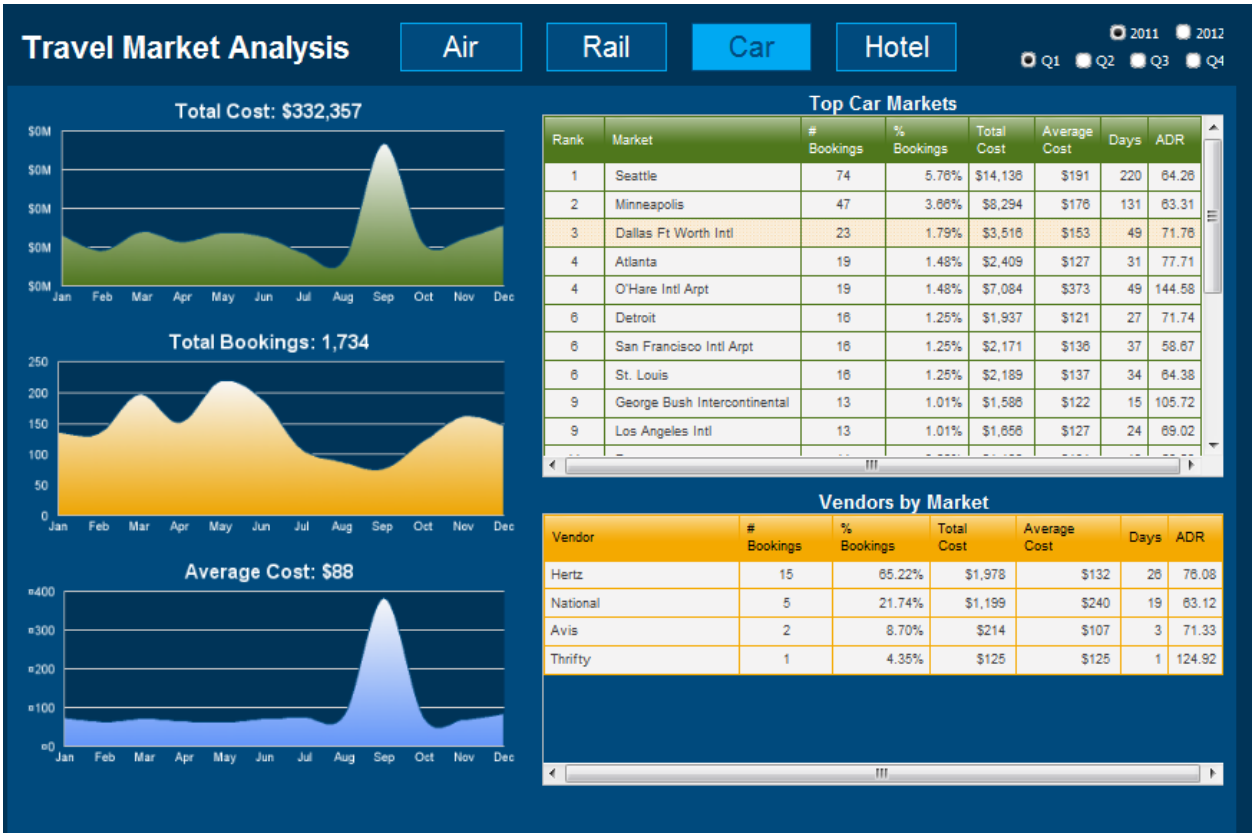


**Top Car Markets**

| Rank | Market | # Bookings | % Bookings | Total Cost | Average Cost | Days | ADR |
|---|---|---|---|---|---|---|---|
| 1 | Seattle | 74 | 5.76% | $14,136 | $191 | 220 | 64.26 |
| 2 | Minneapolis | 47 | 3.66% | $8,294 | $176 | 131 | 63.31 |
| 3 | Dallas Ft Worth Intl | 23 | 1.79% | $3,516 | $153 | 49 | 71.76 |
| 4 | Atlanta | 19 | 1.48% | $2,409 | $127 | 31 | 77.71 |
| 4 | O'Hare Intl Arpt | 19 | 1.48% | $7,084 | $373 | 49 | 144.58 |
| 6 | Detroit | 16 | 1.25% | $1,937 | $121 | 27 | 71.74 |
| 6 | San Francisco Intl Arpt | 16 | 1.25% | $2,171 | $136 | 37 | 58.67 |
| 6 | St. Louis | 16 | 1.25% | $2,189 | $137 | 34 | 64.38 |
| 9 | George Bush Intercontinental | 13 | 1.01% | $1,586 | $122 | 15 | 105.72 |
| 9 | Los Angeles Intl | 13 | 1.01% | $1,656 | $127 | 24 | 69.02 |

**Vendors by Market**

| Vendor | # Bookings | % Bookings | Total Cost | Average Cost | Days | ADR |
|---|---|---|---|---|---|---|
| Hertz | 15 | 65.22% | $1,978 | $132 | 26 | 76.08 |
| National | 5 | 21.74% | $1,199 | $240 | 19 | 63.12 |
| Avis | 2 | 8.70% | $214 | $107 | 3 | 71.33 |
| Thrifty | 1 | 4.35% | $125 | $125 | 1 | 124.92 |

**Top Hotel Markets**

| Rank | Market | # Bookings | % Bookings | Total Cost | Average Cost | Number of Days/Nights | ARR |
|---|---|---|---|---|---|---|---|
| 1 | Eden Prairie | 67 | 3.76% | $25,991 | $388 | 213 | 122.02 |
| 2 | San Francisco | 58 | 3.26% | $20,575 | $355 | 94 | 218.88 |
| 3 | New York | 55 | 3.09% | $31,060 | $565 | 110 | 282.37 |
| 3 | Redmond | 55 | 3.09% | $42,624 | $775 | 208 | 204.92 |
| 5 | BELLEVUE | 41 | 2.30% | $20,180 | $492 | 96 | 210.21 |
| 6 | Alexandria | 32 | 1.80% | $25,182 | $787 | 124 | 203.08 |
| 7 | London | 31 | 1.74% | $18,447 | $595 | 61 | 302.41 |
| 8 | Paris | 23 | 1.29% | $13,082 | $569 | 51 | 256.51 |
| 9 | Prague | 22 | 1.24% | $10,682 | $486 | 79 | 135.21 |
| 10 | Slough | 19 | 1.07% | $5,573 | $293 | 36 | 154.79 |

**Vendors by Market**

| Rank | Vendor | # Bookings | % Bookings | Total Cost | Average Cost | Number of Days/Nights | ARR |
|---|---|---|---|---|---|---|---|
| 1 | Sheraton Suites Old Town Alexandria | 20 | 71.43% | $18,712 | $936 | 93 | 201.21 |
| 2 | Hotel Monaco Alexandria | 6 | 21.43% | $2,799 | $466 | 11 | 254.45 |
| 3 | Hilton Alexandria Old Town | 2 | 7.14% | $647 | $324 | 3 | 215.67 |


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# Dashboard: Travel Program Overview

Available to: ☐ Analysis ☑ Intelligence

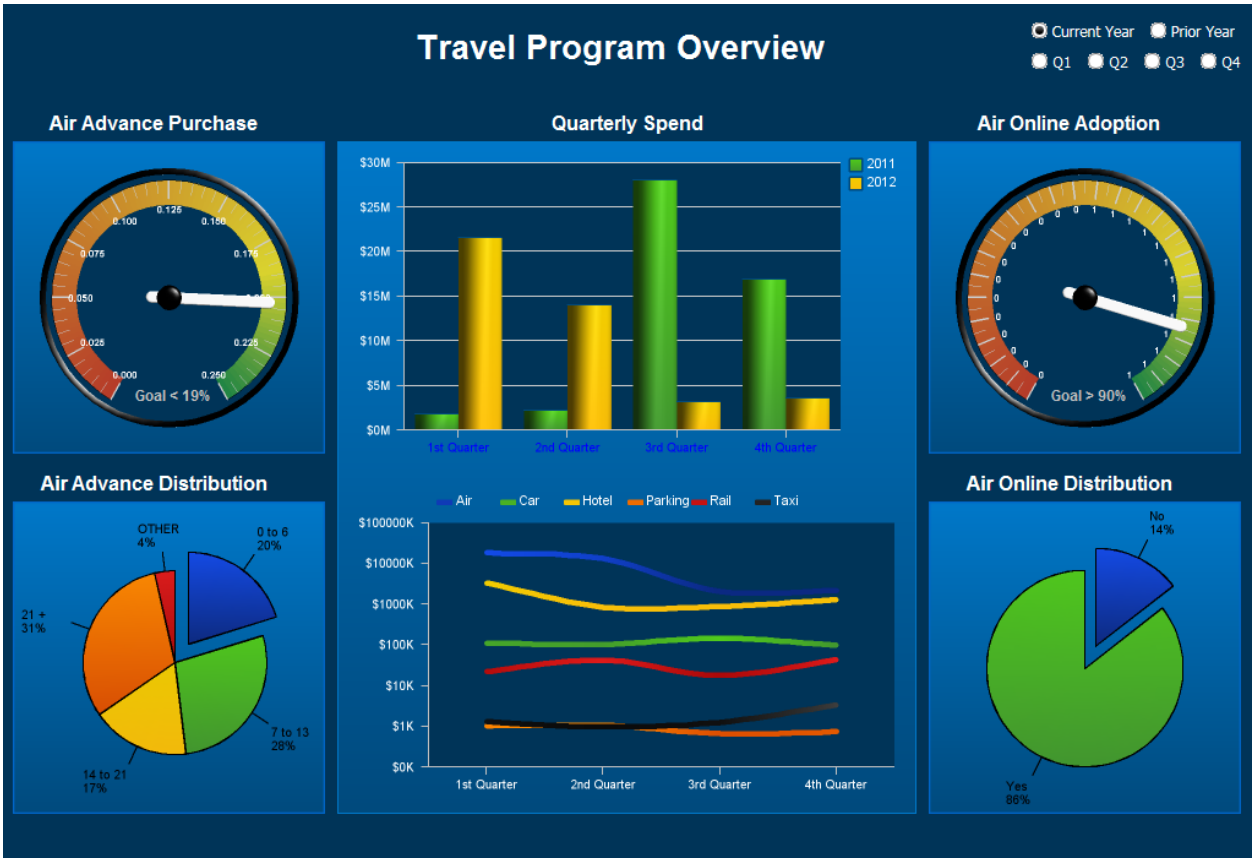
| | |
|---|---|
| **Data Type:** | Concur Travel & Agency Data |
| **Spend Type:** | Reserved / Booked Amount |
| **Date Fields:** | Travel Invoice Dates |
| **Unique Data:** | N/A |

## Description

This dashboard gives travel managers a view into the overall 'health' of their program as it relates to key metrics like online adoption, advance purchase and how far in advance employees are purchasing tickets.

The upper graph compares spend both at a yearly and quarterly level while the lower graph provides trending information for the various commodities across the selected timeframe. The dashboard data can be filtered for specific years and subsequent quarters

## Dashboard Output





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