The presentation will begin shortly. Audio will be streamed directly via your computer speakers. Enjoy the webcast!
Concur Intelligence: Using Analytics to Drive Decision-making

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Sr. Manager, Global Products Reporting & Analytics
Agenda

- Vision and approach
- Best practices
- Recent enhancements
- Upcoming innovations
Integrates your expense, travel and invoice data.

To provide actionable insights.
Concur’s Vision & Approach to Analytics & Reporting

- Persona-focused, problem-solving solutions
- Connected, cleansed & normalized data elements
- Make the data work for you, not you working for data

- Persona-based dashboards & reports
- Automated triggers
- Actionable Alerts
- Enrichment Services
- Integration back to core systems & apps

Make decisions that lead to action
Elements of a Good Business Decision

- Problem
- Insight
- Action

- DEPARTMENT MANAGER
- EXPENSE MANAGEMENT
- FINANCE MANAGEMENT
- TRAVEL MANAGEMENT
- VENDOR MANAGEMENT
- LEGAL & TAX MANAGEMENT
Actionable Alert Framework

Employee submits expense or books travel ➔ Budget threshold is triggered ➔ Manager receives email alert
Best Practices in Reporting

- Map expense types to spend categories
- Map expense types to travel reservation (trip) types
- Enable travel-related options:
  - Allow import bookings
  - Allow pre-expense airfare
- Enable the “Allow users to combine expense into a single merged expense” site setting
- Map expense types to match categories

Best Practices – Expense Configuration for Analysis/Intelligence Setup Guide
Currently Available in Concur Intelligence
Accessing the dashboard

1. Look for Persona Dashboards in the Public Folders/Standard Reports.

2. Once in the Persona Dashboards folder, click on Department Manager Overview.

3. To view the dashboard, click on Dashboard – Department Manager Overview.

4. You can run the drill reports from the dashboard, but if you want to run them separately, click on the Detail Reports folder to access each report.
Quicker and Easier Access to Dashboards
Department Manager Dashboard

Spend Tab
- Budget vs Spend
- Future Trips
- Top Spending Employees

Embedded Education

Drill Reports

Expense Tab
- Average Life Cycle
- Unsubmitted Transactions
- Credit Card Adoption
- Average Spend by Spend Category
- Policy Exceptions by Employee
Actionable Analytics

Manager: Tarble, Brian
PROBLEM IDENTIFICATION

This alert shows you the transactions as charged on the corporate card prior to the transaction being processed through the expense system, thus giving you timely exposure to potential risk.

DETAILED INFORMATION – Below are listed the transactions that caused the Trigger.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Card Holder Name</th>
<th>Charge Date</th>
<th>Employee Email Address</th>
<th>Card Type</th>
<th>Merchant Description</th>
<th>Merchant City Location</th>
<th>Posted Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carter, Mary A</td>
<td>Mary A Carter</td>
<td>Jan 12, 2016</td>
<td><a href="mailto:mary.carter@concur.com">mary.carter@concur.com</a></td>
<td>AK</td>
<td>Delta Airlines</td>
<td>Atlanta</td>
<td>999.99</td>
</tr>
<tr>
<td>Simpson, Allen</td>
<td>Allen Simpson</td>
<td>Jan 12, 2016</td>
<td><a href="mailto:allen.simpson@concur.com">allen.simpson@concur.com</a></td>
<td>AK</td>
<td>Best Buy</td>
<td>Charlotte</td>
<td>999.99</td>
</tr>
</tbody>
</table>

ACTIONS

Please review and take appropriate action as follows:

Review the transaction with your employee(s) to ensure this is a valid transaction for business purposes.
Upcoming Product Innovations

• Spend Management Dashboards
• Fiscal Year
• Localization
• NextGen
• Data Platform & Enrichment Services
• Integration Back to Core Product
Spend Management Dashboards
- Expense
- Invoice
- Audit
- Finance
- Cash Management
- Invoice Processor
- Credit Card Optimization

Color palette for visually impaired
- Tool tips
- Drill reports

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Combined Expense and Invoice spend

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Calendar Year → Fiscal Year

1. Change UI in Reporting Configurations
   • Targeting December

2. Change reports with embedded calendar year filter
   • ~100 reports
   • Phased approach
Translations

- English: September
- French: November
- German: December
- Japanese: December
- Traditional and Simplified Chinese: January
Additional Languages

- Brazilian Portuguese
- Korean
- Italian
- Spanish – Latin America
- Danish
- Swedish
- Dutch
- Finnish
- Norwegian

- French – Canada
- Spanish – Europe
- Polish
- Russian
- Czech
- Hungarian
- Portuguese – Europe
- Turkish
- Thai
- Indonesian
Next Generation Analytics

- **Connected, transparent, and effortless**
  - Real-time Data Pipeline
  - Decoupled UX from Reporting Engine

- **Enhanced technology**
  - SAP HANA
  - UI / UX overhaul

- **Best-in-class**

These are product development themes being considered and there is no commitment for delivery of these features.
How

Technology Roll-out

Enterprise Architecture / Platform

Product Roll-out

SMN Free Edition
SMN Premium Edition
Enterprise Free Edition
Enterprise Premium Edition
NextGen SMN Dashboard Q1 2017 Release
Data Platform Team Focused on Data Quality

Vendor Normalization

TripLink Data Quality

Configuration Analysis
What is my total lodging spend with the Seattle Marriott Waterfront in 2016?

Does my company spend more on business class airfare than other enterprise customers?

Who are the Marriott users I should be targeting with messaging?

How much could my small business save if I switched telecommunication providers?

Is the $400 daily rate for Vienna something I should pay more attention to?

How does my company’s spending on rail between Paris Nord and Amsterdam Central compare to other similar companies?

Am I fulfilling my air travel contract for the Chicago O’Hare to Dulles route with United?

How does SMN air spend compare to Enterprise customers?
Alerts to integrated Action

1. Manager enters budget
2. Manager sets threshold for budget notification
3. Email alert sent to manager when budget threshold met/exceeded
4. Travel Request automatically enabled for manager AND/OR
5. Workflow approval automatically realigned to support Travel Request
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