

# Conquer your Concur Data With Tableau + Informatica

Mary Grace Glascott | Tableau Software Inc.

Nick Brisoux | Tableau Software Inc.

Doug Louie | Informatica

City 2	Avg. leg price	Avg. segmen	Base amount	Booking channel	Filter Booking method	City 1
Seattle (SEA)	\$747.91	\$299.16	\$1,495.82	Standard air	Agent-assisted	Detroit (DTW)
Seattle (SEA)	\$435.35	\$435.35	\$435.35	Standard air	Online	Chicago (ORD)
Seattle (SEA)	\$0.00	\$0.00	\$452.74	Standard air	Agent-assisted	Boston (BOS)
Seattle (SEA)	\$254.27	\$254.27	\$254.27	Standard air	Agent-assisted	Denver (DEN)
Seattle (SEA)	\$743.26	\$743.26	\$743.26	Standard air	Agent-assisted	Boston (BOS)
Seattle (SEA)	\$446.51	\$223.26	\$446.51	Standard air	Agent-assisted	Chicago (MDW)
San Francisco (SFO)	\$177.68	\$177.68	\$355.35	Standard air	Agent-assisted	Chicago (ORD)
Seattle (SEA)	\$435.35	\$435.35	\$435.35	Special request air	Agent-assisted	Chicago (MDW)
Seattle (SEA)	\$0.00	\$0.00	\$849.30	Standard air	Online	Cleveland (CLE)
San Francisco (SFO)	\$134.42	\$134.42	\$268.84	Standard air	Online	Seattle (SEA)
Salt Lake City (SLC)	\$175.35	\$175.35	\$350.70	Special request air	Online	Seattle (SEA)
Seattle (SEA)	\$446.51	\$223.26	\$446.51	Standard air	Agent-assisted	Chicago (MDW)
Seattle (SEA)	\$338.60	\$169.30	\$338.60	Standard air	Agent-assisted	Chicago (MDW)
Seattle (SEA)	\$0.00	\$0.00	\$616.74	Standard air	Online	Kansas City (MCI)
San Francisco (SFO)	\$134.42	\$134.42	\$268.84	Standard air	Online	Seattle (SEA)
Seattle (SEA)	\$177.68	\$177.68	\$355.35	Standard air	Agent-assisted	Chicago (ORD)
Seattle (SEA)	\$866.05	\$433.02	\$866.05	Standard air	Online	Cleveland (CLE)
Seattle (SEA)	\$168.37	\$112.25	\$336.74	Standard air	Online	Chicago (ORD)
Seattle (SEA)	\$253.02	\$253.02	\$506.04	Standard air	Online	Oakland (OAK)
Seattle (SEA)	\$426.64	\$426.64	\$426.64	Standard air	Agent-assisted	Chicago (ORD)
London (LHR)	\$160.49	\$106.99	\$323.00	Standard air	Online	Los Angeles (LAX)
Seattle (SEA)	\$177.68	\$177.68	\$355.35	Standard air	Agent-assisted	Chicago (ORD)
San Francisco (SFO)	\$134.42	\$134.42	\$268.84	Standard air	Online	Seattle (SEA)
Singapore (SIN)	\$341.40	\$170.70	\$341.40	Standard air	Agent-assisted	Tokyo (NRT)
Seattle (SEA)	\$0.00	\$0.00	\$446.51	Standard air	Agent-assisted	Houston (IAH)
Washington (WAS)	\$0.00	\$0.00	\$446.51	Standard air	Agent-assisted	Denver (DEN)
Montreal (YUL)	\$0.00	\$0.00	\$446.51	Standard air	Online	Seattle (SEA)
Washington (WAS)	\$0.00	\$0.00	\$446.51	Standard air	Agent-assisted	Denver (DEN)
Seattle (SEA)	\$371.17	\$247.44	\$742.33	Standard air	Online	Washington (DCA)
Seattle (SEA)	\$218.26	\$218.26	\$436.52	Standard air	Online	Houston (IAH)
Washington (WAS)	\$424.19	\$424.19	\$848.38	Standard air	Agent-assisted	Charlotte (CLT)
San Francisco (SFO)	\$174.97	\$174.97	\$349.94	Standard air	Online	San Diego (SAN)
Seattle (SEA)	\$374.65	\$216.43	\$649.30	Standard air	Online	Detroit (DTW)



# A Few Housekeeping Items

Don't worry about your mute button...All lines are muted

Questions? Please ask them in the Q&A box!

This session is recorded and will be posted online shortly

# First, some introductions...



Nick Brisoux  
Director, Product Management-  
Technology Partners  
Tableau



Doug Louie  
Director, Product Marketing-  
SaaS Applications  
Informatica



Mary Grace Glascott  
Sr. Product Marketing Manager-  
Technology Partners  
Tableau

# Sources of Finance Data

# 96%

of finance executives say proliferating amounts of data have made their jobs more complex



# THE WALL STREET JOURNAL.

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[BUSINESS](#) | [CFO JOURNAL](#)

## Stop Using Excel, Finance Chiefs Tell Staffs

Ubiquitous spreadsheet software that revolutionized accounting hasn't kept up, CFOs say

Time exporting, manipulating data  
Errors can bloom in spreadsheets

Data is out-of-date  
Distributing and sharing analysis



# Tableau helps people and organizations become more data-driven

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**Analytics people  
love to use**

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**An integrated  
platform  
that is easier to  
start and scale**

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**The trusted  
leader in analytics**

# How our finance department uses Tableau

## Accounting

- Variance analysis and testing
- VSOE tracking
- Account reconciliation
- Allocation setting and validation

## FP&A / IR

- KPI tracking and reporting
- T&E compliance
- Analyst position tracking
- Forecast scenarios

## Internal Audit

- Expense policy compliance
- SOX status reporting
- Fraud detection

## Treasury / AR

- Cash positioning / forecast
- FX exposure
- AR case queue
- AR aging

## Purchasing

- Consolidated vendor spending
- PO approval monitoring
- Terms reporting

## Accounts Payable

- Invoice receipt monitoring
- Payment validation and monitoring

## Tax

- M&E deduction analysis
- Stock-based comp reviews

# Data sources our Finance Department uses



# Data sources our Finance Department uses

**SAP Concur** 

Get a deeper look at how Tableau does  
Finance Analytics in [Tableau Public](#)

# Travel and Expense Spending



## Questions to answer for your business

Who are our top travelers?

What is spending per FTE by department?

Are employees following T&E policies?

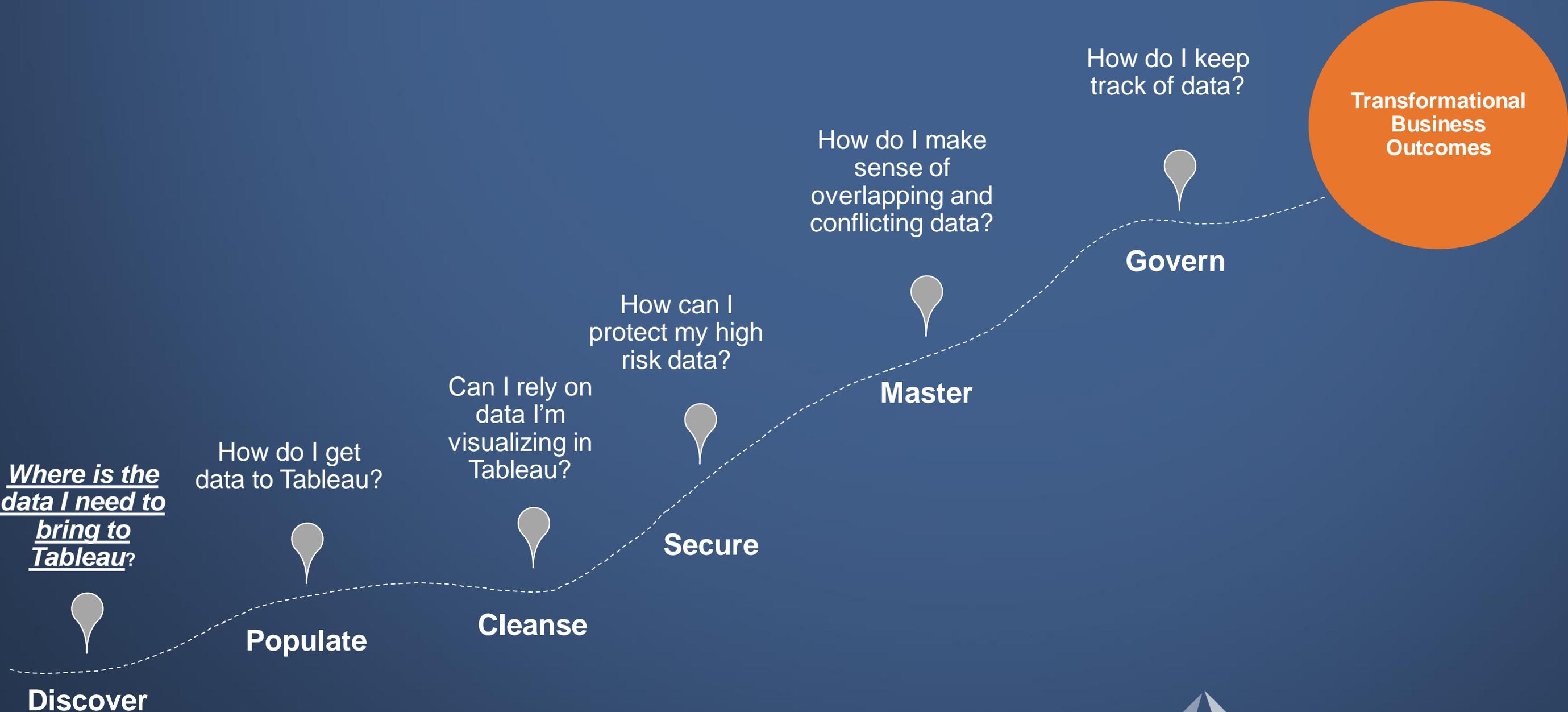
How far in advance are we booking travel?

Who are our top vendors and should we seek discounts?

Do we have personal or corporate tax implications?

Where are my employees?

# Delivering trusted data at every step in the pipeline



# A Modern Analytics Platform that connects to ALL your data



We Make it Easy to Gain Insight and Take Action



Informatica™

We Deliver Trusted Data Quickly

**Traditional /  
Real Time**



**Cloud**



**Big Data**



Regardless of Where Your Data Resides

How to make this a reality with Informatica:  
Demo

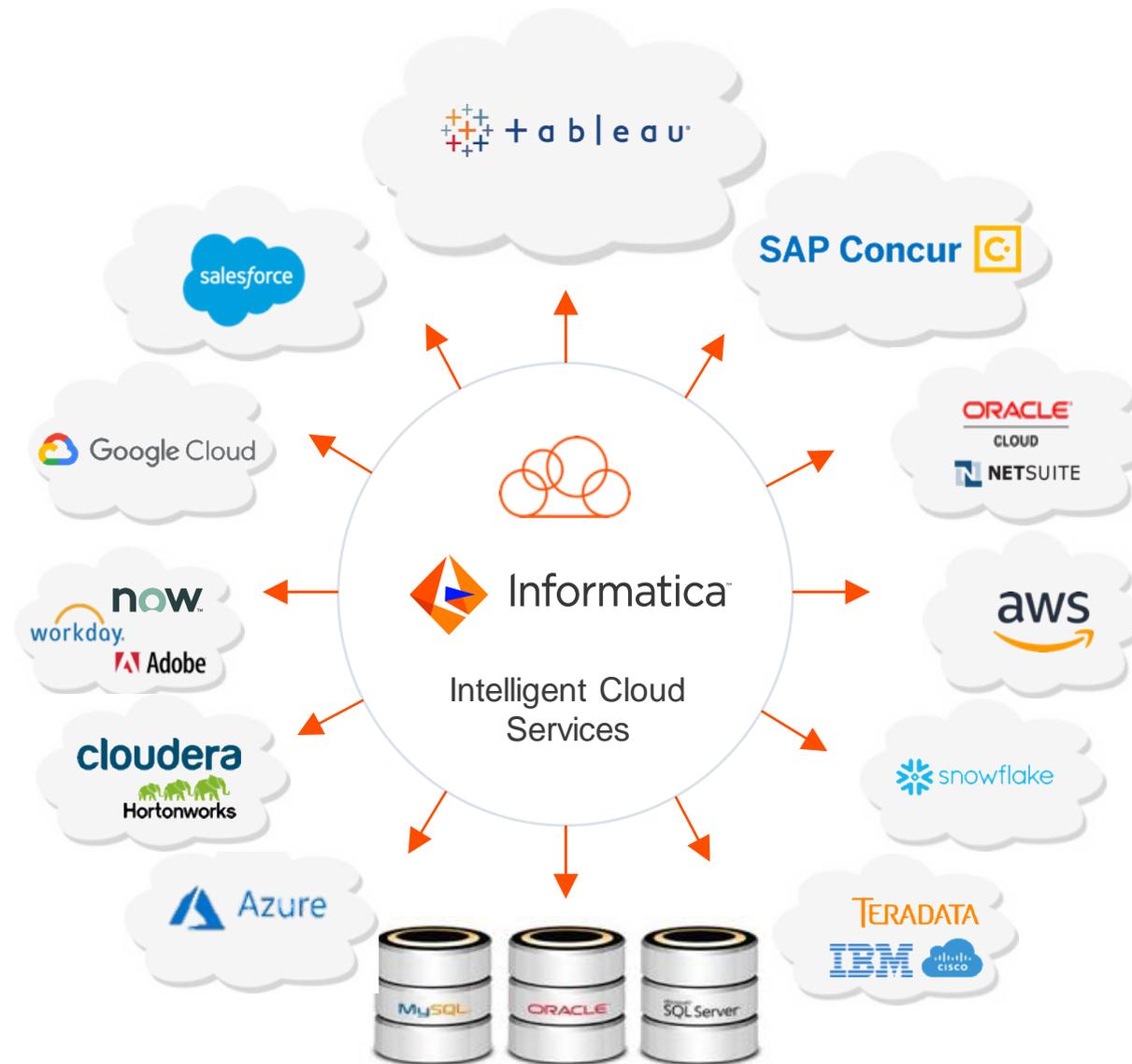
# Informatica Integrations

## Solution

Any integration pattern, any user, any type of data

Modern micro-services based architecture powered by AI/ML

Unified, modular, hybrid, secure and trusted iPaaS



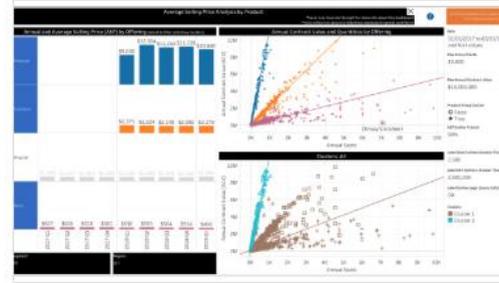
# Next Steps: Learn More

## About Finance Analytics

<https://www.tableau.com/solutions/finance-analytics>

## About Tableau + Informatica

<https://www.tableau.com/resources/informatica>



WHITEPAPERS

### 7 Essential Finance Dashboard Strategies

Finance departments rely on many dashboards to manage their workload. Explore finance dashboards designed to strategically enable data-driven decision making.



BLOG POST

### Business success depends on IT and Finance

Damon Fletcher, Tableau's CFO, explains why business success often hinges on finance and IT working in harmony, and how to make that happen.



WHITEPAPERS

### 4 Steps for Finance Departments to Drive Business Intelligence

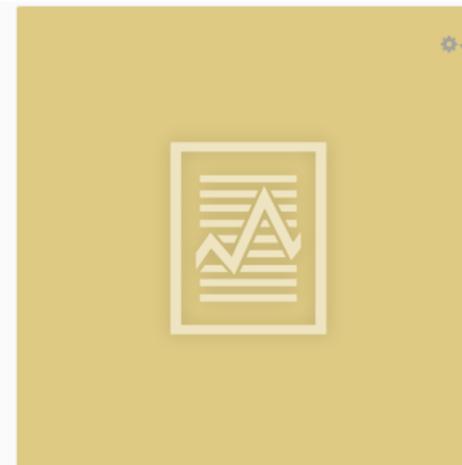
Learn how modern finance departments are saving time and delivering insights to the business with visual analytics.



WHITEPAPER

### 5 Steps to Self-Service Analytics that Scales

TOPICS: FINANCE ANALYTICS FOR PUBLIC SECTOR , IT ANALYTICS , SMART ANALYTICS



WHITEPAPER

### Developing a Governed Self-Service BI Strategy

TOPICS: SALES ANALYTICS , IT ANALYTICS , FINANCE ANALYTICS



ON-DEMAND WEBINAR

### Tableau and Informatica: Cloud Analytics Simplified

TOPICS: FINANCE ANALYTICS FOR PUBLIC SECTOR , MARKETING ANALYTICS , INFORMATICA

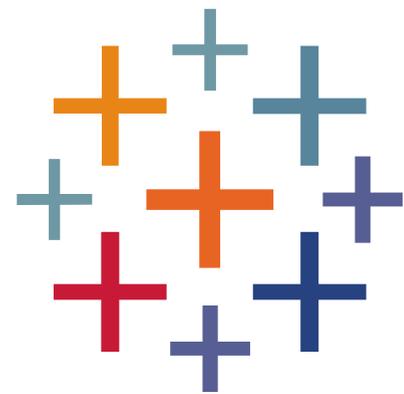
# Next Steps: Play around

Download a sample workbook & data

The screenshot shows the 'Concur' resource page on Tableau. At the top, there are two buttons: 'STARTER WORKBOOK' and 'WORKBOOK WITH SAMPLE DATA'. Below these are three main cards, each with the Concur logo and a play button icon. The first card is titled 'Get your Data' and includes a 'RESOURCES' section with 'Tutorial, Part I', a description 'Learn how to download your data and prepare it for Tableau.', and a link 'Download as a PDF here.' with a 'WATCH NOW' button. The second card is titled 'Connect to your Data' and includes a 'RESOURCES' section with 'Tutorial, Part II', a description 'Learn how to connect and begin analyzing your Concur data in Tableau.', and a link 'Download as a PDF here.' with a 'WATCH NOW' button. The third card is titled 'Explore your Data' and includes a 'Tutorial, Part III' section, a description 'Learn some tips and best practices on exploring your Concur data.', a link 'This tutorial is also available as a PDF, here.', and a 'WATCH NOW' button.

<https://www.tableau.com/resource/travel-and-expense#concur>

Thank you! Questions?



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