Consolidated Performance Report Dashboard: Content Overview

Dashboard Vision
The Consolidated Performance Report (CPR) dashboard is a single portal providing a high-level view of data relevant to management needs. The CPR combines financial data, drivers, and operational indicators in a single page, allowing users the ability to identify areas of concern across the business. From the initial high-level view, drill capability is provided that allows users to zero in on areas of concern.

Navigation to Dashboard
- Direct Link to Consolidated Performance Report
- EBI Home>Dashboards Menu>Executive Dashboard>Consolidated Performance Report
- Consolidated Performance Report will be your EBI starting page unless you have previously set a default starting page. If you need to overwrite your existing landing page, follow these instructions:
  - Once logged into EBI, click on your name in the upper right-hand corner
  - Click on My Account
  - Preferences will be displayed. Use the drop down menu to select Executive Dashboard: Consolidated Performance Report as your Starting Page

Content Overview: Table of Contents
1. Key Functionality
   a. Default Prompts
   b. Data Refresh Cycle
   c. Drilling
   d. Definitions
2. Recent Enhancements
3. Financials Section
   a. Home Page
   b. FYTD Actual Trends Drill
   c. Budget Transaction Details Drill
   d. Labor Details Drill
   e. Transaction Details Drill
4. Drivers Section
   a. Home Page
   b. Enrollment Trends Drill
5. Operations Section
   a. Home Page
   b. T&E Trends Drill
   c. T&E Pending Analysis Drill
   d. T&E Pushback Analysis Drill
   e. Expense Reports Detail Drill
   f. Location Details Drill
   g. Traveler Details Drill
   h. Department Details Drill
   i. Pending Details Drill
   j. Pushback Details Drill
Key Functionality

Default Prompts

- **Dates**
  - The default date selection is for the current fiscal year and accounting period
  - Drop down menus are provided to enable selection of prior accounting periods and/or fiscal years

- **Business Unit/Operating Unit/Department**
  - The default prompt selections have been assigned to your NETID based on your area of responsibility.
  - To determine what has been selected for you, **scroll to the bottom** of the main page and review the **Prompt Selections**

  - If you feel that your area of responsibility has been improperly assigned, please email the Enterprise Performance and Data Analytics team and we will gladly correct the assignment.

Data Refresh Cycle

- Data in EBI is refreshed nightly and is one day behind source system

Drilling

- Drills will open in the same tab/window, with the exception of transaction detail drills, which will open in a new tab
- To return to the CPR Home Page, simply **click on the link** at the top of any of the drill pages

  - When clicking on drillable fields, a window will appear. You must **click on the window** to execute the drill.

Definitions

- Definitions are provided for fields in the default layout of each report
- **Look** for the **Elements** section within each of the content descriptions for **definitions**.
  - E.g.: Financials Section, **Home Page: Elements**
Recent Enhancements

Overview:
This section will document the enhancements that have most recently been added to the Consolidated Performance Report (CPR). The Content Overview section for the areas enhanced will retain the old content data for comparison purposes. When a subsequent enhancement cycle is completed, previous enhancements will be integrated into the Content Overview section, and this page will only contain the most recent enhancements added.

Enhancement Cycle Details:
- **Enhancement Cycle:** 1
- **Enhancement(s) release date:** 9/4/2018
- **CPR Section(s) enhanced:** Operations Section, Travel and Expense Trends Page
- **Number of enhancements added:** 12
- **Enhancement(s) requested by:** Survey feedback

Enhancement Details:
Overview:
Enhancements in this cycle are based on feedback provided in the Consolidated Performance Report survey distributed to EFN upon release of the Consolidated Performance Report. According to survey results, three major areas of enhancements were identified for the Operations section on the Travel and Expense Trends page:
1. Analysis related to the seasonality of travel and expense reimbursements
2. Visibility into expenses related to travel and expense reimbursements identified as travel vs. those identified as non-travel
3. Insight into direct billed airfare expenses

Where to Find Enhancements:
All of the enhancements in this cycle are located in the Operations section on the Travel and Expense Trends page.
- Navigate to the Consolidated Performance Report
- Under the Operations section, click on the words Travel and Expense Reimbursements to drill to the T&E Trends page.
  - Click on “Drill to T&E Trends” to load the T&E Trends drill page
  - Scroll down to the section labeled “Trends: Expense Reports Posted to Ledger”
Enhancements Content Overview:

1. **New Analysis: Seasonality: Expenses by Accounting Period and Fiscal Year**
   This is a new graph providing a view of the percentage of total fiscal year travel and expense reimbursement costs each accounting period represents for the 5 fiscal years prior to the year prompted. This provides the ability to determine whether seasonality is a factor while projecting travel and expense costs for the remainder of the fiscal year based on previous trends.

![Seasonality: Expenses by Accounting Period and Fiscal Year](image)

2. **Enhanced Analysis: Expenses by Accounting Period**
   This visualization has been enhanced by changing the previous bar graph to a stacked bar graph, showing expenses by travel and non-travel. The assignment of travel or non-travel is provided by the expense report submitter upon creation of the expense reimbursement.

   Please note: not all expense reimbursements have been designated as travel or non-travel and therefore may have a designation of “data not collected”.

![Expenses by Accounting Period](image)

*Drill to expense report detail is available by clicking on the desired bar. Additional views are available by clicking on the drop-down menu labeled “Select View”.*
3. **New Analysis: Direct Billed Airfare Expenses**
   This new analysis provides insight into airfare expenses being charged using the direct bill feature. Direct billed airfare is not included on travel and expense reimbursements and instead posts directly to the ledger. Two analyses are provided. The first is a performance tile indicating the total amount of direct billed airfare charged year-to-date for the prompted fiscal year and accounting period. The second is a bar graph showing direct billed airfare by accounting period.

   ![Direct Billed Airfare Expenses FYTD](image)

   *Drill to direct bill detail is available by clicking on either the total amount billed year-to-date, or on the desired bar.*

4. **Enhanced Analysis: Top 10 Destinations by Total Expense**
   This graph is now restricted to destinations on expense reimbursements that have been identified as travel-related reimbursements.

   ![Top 10 Destinations by Total Expense ($)](image)

   *Drill to expense report details is available by clicking on the desired bar.*
5. **Enhanced Analysis: Top 10 Travelers by Year-To-Date Amount**

This graph is now restricted to employees being reimbursed on expense reimbursements that have been identified as travel-related.

_Drill to traveler details is available by clicking on the desired bar._

6. **Enhanced Analysis: Top 10 Departments by Year-To-Date Amount**

This visualization is now restricted to the top 10 departments based on expenses charged on reimbursements identified as travel-related.

_Drill to department details is available by clicking on the desired bar._
7. **New Analysis: Top 10 Expense Types by Year-To-Date Amount**

This graph has been added to provide insight into the types of expenses being reimbursed on expense reimbursements identified as travel-related. Expense Types are selected from a drop down menu by the submitter of the expense reimbursement to designate the type of expense being reimbursed.

![Top 10 Expense Types by Year-To-Date Amount]

*Drill to expense type details is available by clicking on the desired bar.*

8. **New Analysis: # of Travelers Using Corporate Card and Amount Spent by Accounting Period**

This new analysis is a line-bar graph indicating the number of people being reimbursed on expense reimbursements marked as travel-related who are using their *corporate cards* for expenses, and the total amount of expenses by accounting period. The line indicates the number of travelers, while the bar provides the total amount of expenses reimbursed.

![# of Travelers Using Corporate Card and Total Amount Spent by Accounting Period]

*Return to Table of Contents*
9. **New Analysis: # of Travelers Using Personal Funds and Total Amount Spent by Accounting Period**

This new graph indicates the number of people being reimbursed on expense reimbursements marked as travel-related who are using their personal funds for expenses, and the total amount of expenses by accounting period. The line indicates the number of travelers, while the bar provides the total amount of expenses reimbursed.

![Graph of # of Travelers Using Personal Funds and Total Amount Spent by Accounting Period]

10. **New Analysis: Non-Travel – Expenses by Accounting Period**

This new analysis provides a view of expenses by accounting period that are on expense reimbursements identified as non-travel by the submitter. The visualization is a stacked bar and shows expenses broken down by corporate card and personal funds.

![Graph of Expenses by Accounting Period]

*Drill to expense report detail is available by clicking on the desired bar. Additional views are available by clicking on the drop-down menu labeled “Select View”.*
11. **New Analysis: Top 10 Spenders by Year-to-Date Amount**
This visualization provides users the ability to see the top 10 spenders of non-travel reimbursements. The Expense Report Name is the name of the individual for whom the expense reimbursement was submitted. This is limited to expense reimbursements that have been identified as non-travel expenses by the submitter.

![Top 10 Spenders by Year-to-Date Amount](image)

*Drill to spender details is available by clicking on the desired bar.*

12. **New Analysis: Top 10 Spenders by Year-to-Date Amount**
This visualization provides users the ability to see the top 10 spenders of non-travel reimbursements. The Expense Report Name is the name of the individual for whom the expense reimbursement was submitted. This is limited to expense reimbursements that have been identified as non-travel expenses by the submitter.

![Top 10 Expense Types by Year-to-Date Amount](image)

*Drill to expense type details is available by clicking on the desired bar.*
Financials Section

Home Page: Overview
The Financials section of the Consolidated Performance Report (CPR) gives the user insight into the financial health of the Unrestricted Operating Budgets within their organization. Categories are provided for Revenues, Expenses, and Transfers, as well as additional break out by Account Class. Users can clearly identify the amount of budget remaining, and, with the use of the visual burn rate indicator, can drill in on areas of concern quickly.

Home Page: Elements
- **Categories**
  - Account Groups: These are broad groupings of account codes
    - Revenues
    - Expenses
    - Transfers
  - Account Class: Categories of revenues or expenses that are closely aligned in function
    - E.g.: Tuition and Fees, Salary & Fringe Benefits
- **Financial Data**
  - Budget
    - Budget amount as of the fiscal year and accounting period prompted
    - Budget includes original budget load and any revisions that have posted
    - **Click on any value in the Budget column** to drill to [Budget Transaction Details](#)
  - FYTD Actual
    - Actual revenues, expenses, or transfers as of the fiscal year and accounting period prompted
    - Includes only items posted to the general ledger
    - **Click on any value in the FYTD Actual column** to drill to the [FYTD Actual Trends Analysis](#)
  - Budget Remaining
    - This is a calculated field that subtracts FYTD Actual from Budget
    - LTD Encumbrances are not included in the Budget Remaining calculation
- **Indicators**
  - % Used FYTD
    - This is a calculated field that divides the FYTD Actual by the Budget
  - Burn Rate
    - This is a visual representation of your burn rate relative to the time of year
    - Burn rate is calculated on the assumption that budget is used evenly throughout the fiscal year (e.g.: the burn rate assumes that through period five you would have used 5/12 of your budget)

Home Page: Business Questions
Some examples of business questions that might be answered by the data provided in the Financials section of the Home Page are:
- Have we received the amount of tuition and fees expected by this point in the year?
- Do we expect to exceed our financial aid budget for this fiscal year?
FYTD Actual Trends Drill: Overview
The FYTD Actual Trends provide a more detailed view into the account category from which the user has drilled. Details are broken down by Account Category and Account Code. Visual indicators on the % Used column correlate with the Burn Rate indicator from the Home Page.

FYTD Actual Trends Drill: Elements
- **Status Check:**
  - Performance tiles indicating the Budget amount, FYTD Actual amount, and the % Used FYTD for the prompted Account Class as of the prompted fiscal year and accounting period
  - The colored background on % Used FYTD correlates to the colored indicator of the Burn Rate column on the Home Page.

- **FYTD Actual Trends**
  - The graph in the middle is a stacked bar showing FYTD Actual amount by accounting period
  - The colors indicate the account category to which the expenses have posted
By clicking on any section of the graph, the graph and table underneath will update to reflect details by account code.

Clicking on the dollar amount in the budget column will drill to the Budget Transaction Details. Clicking on the dollar amount in the FYTD Actual column will drill to either Labor Details (on labor account codes), or Transaction Details (for non-labor account codes).

FYTD Actual Trends Drill: Business Questions

Some examples of business questions that might be answered by the data provided in the FYTD Actual Trends section are:

- What account category represents the largest amount of spend for a given account class?
- From which account code are most of the faculty salaries paid?
Budget Transaction Details Drill: Overview
The Budget Transaction Details Drill is a detailed view of the original budget loads, as well as any revisions or budget transfers that have taken place as of the prompted fiscal year and period.

Budget Transaction Details Drill: Elements
- **Default View Columns: Definitions**
  - Fiscal Year: The fiscal year to which the budget entry has posted
  - Operating Unit: The Operating Unit ID and Description to which the budget entry has posted
  - Fund Group: This field identifies the broad fund group (i.e.: Unrestricted Operating Budget, Non-Sponsored Projects, Sponsored Projects) to which the budget entry has posted
  - Account: The account code to which the budget entry has posted
  - Accounting Period: The fiscal based accounting period to which the budget entry has posted
  - Budget Transaction Date: The date on which the budget entry posted to the ledger
  - Budget Transaction ID: The transaction ID in Compass for the budget entry
  - Budget Entry Type: This field identifies whether a budget entry is an original budget load, budget revision, or budget transfer
  - Budget Transaction Amount: The dollar amount of the budget entry

- **Additional columns available**
  - By right clicking on any column header, and choosing “Include Column”, there are a variety of columns available to be included in the report view

---

![Image](image_url)
Budget Transaction Details Drill: Business Questions

Some examples of business questions that might be answered by the data provided in the Budget Transaction Details Drill section are:

- What was the amount of the original budget load for Travel?
- Has the budget revision for additional salary posted?
Labor Details Drill: Overview
The Labor Details drill provides detail by employee for the amount of salary paid based on the account code, fiscal year and accounting period prompted.

Labor Details Drill: Elements
- **Default View Columns: Definitions**
  - Employee ID: The unique identifier assigned to an individual employee
  - Employee Name: The name of the employee
  - HR Department: The unique identifier and description of the Home Department meaning the department that an employee is assigned to from HR point of view
  - Job Code Description: The description of the job code that has been assigned to the employee (e.g.: Professor – Tenured)
  - Hours: The number of hours for which the employee has been compensated as of the prompted fiscal year and accounting period. This may include work hours, vacation time, sick leave, etc.
  - Earnings Amount: The amount of compensation paid as of the prompted fiscal year and accounting period

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>HR Department</th>
<th>Job Code Description</th>
<th>Hours</th>
<th>Earnings Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000112</td>
<td>733025-SOM: Medicine: Infectious Dis</td>
<td>Professor - Tenured</td>
<td>113.20</td>
<td>11,120.00</td>
</tr>
<tr>
<td>0000196</td>
<td>832070-ECAS: Psychology</td>
<td>Professor - Tenured</td>
<td>872.00</td>
<td>64,262.80</td>
</tr>
<tr>
<td>0000238</td>
<td>814000-SPH: Epidemiology</td>
<td>Professor - Tenured</td>
<td>284.63</td>
<td>32,824.79</td>
</tr>
<tr>
<td>0000272</td>
<td>832060-ECAS: Political Science</td>
<td>Professor - Tenured</td>
<td>872.00</td>
<td>68,558.60</td>
</tr>
<tr>
<td>0000301</td>
<td>832070-ECAS: Psychology</td>
<td>Professor - Tenured</td>
<td>872.00</td>
<td>53,172.20</td>
</tr>
</tbody>
</table>

*Note: Employee Name field removed from this image due to security policy*

- **Additional columns available**
  - By right clicking on any column header, and choosing “Include Column”, there are a variety of columns available to be included in the report view
Labor Details Drill: Business Questions

Some examples of business questions that might be answered by the data provided in the Labor Details Drill section are:

- How many hours has Employee X been compensated for year-to-date?
- What is the total amount of compensation paid to Employee X?
Transaction Details Drill: Overview
The Transaction Details Drill provides detail by Journal ID for the amount of a transaction based on the account code, fiscal year, and accounting period prompted.

Transaction Details Drill: Elements
- **Default View Columns: Definitions**
  - Accounting Period: The fiscal period to which the transaction has posted
  - Account: The account code and description to which the transaction has posted
  - Department: The Department ID and Description to which the transaction has posted
  - Project: The Project ID and Description (where applicable) to which the transaction has posted
  - Fund: The Fund Code and Description to which the transaction has posted
  - Journal Created By: The Emory NETID of the person who submitted a Compass transaction (Payment Request, Journal, Travel and Expense Reimbursement)
  - Journal Line Desc: The details entered into the Journal Line Description column at the time the journal was submitted in Compass
  - Expense Report ID: The 10 digit ID assigned to a Travel and Expense Reimbursement by Compass at the time that the reimbursement is saved
  - Expense Report Traveler: The name of the employee for whom the travel and expense reimbursement was submitted
  - Vendor Desc: The name of the vendor for whom a PO or Payment Request was submitted
  - PO ID: The ID assigned to a purchase order in Emory Express
  - Voucher ID: The ID assigned to a voucher payment against a PO in Emory Express or a Payment Request submitted in Compass
  - Invoice Num: The invoice number as provided by the vendor
  - Accounting Line Desc: Details related to the transaction such as item details from Emory Express, descriptions provided on payment requests, direct billed airfare details, direct billed cell phone details, etc.
  - Monetary Amount: The dollar amount of the transaction
• Additional columns available  
  o By right clicking on any column header, and choosing “Include Column”, there are a variety of columns available to be included in the report view.

Transaction Details Drill: Business Questions
Some examples of business questions that might be answered by the data provided in the Transaction Details Drill section are:
  • Did the payment to Vendor X hit our ledger yet?
  • How much have we reimbursed to Employee X year-to-date?
Drivers Section

Home Page: Overview

The Drivers Section of the Consolidated Performance Report is focused on Student Enrollment Data for Release 1. Enrollment data is presented at a high level for the term prompted and is based on total school enrollment. At a glance, users are able to determine enrollment and units taken (credit hours) variance to same term, prior year.

Home Page: Elements

- **Enrollment Default View Columns: Definitions**
  - Enrolled students: The distinct number of students enrolled in the School prompted
  - Enrollment data is shown for the prompted term and the same term prior year
  - Variance data shows the variance from prompted term to same term prior year. If variance is negative, (i.e.: fewer students enrolled in prompted term vs. same term prior year), the variance will be shown in red.
  - At this time, Enrollment data by Department is not available. If a Department is selected in the Prompts, Enrollment data will be for the School to which the Department belongs.
  - Drilling on any value for Enrollment will drill to Enrollment Trends

- **Units Taken Default View Columns: Definitions**
  - Units Taken: Total number of credit hours for enrolled students in the School prompted
  - Units Taken data is shown for the prompted term and the same term prior year
  - Variance data shows the variance from prompted term to same term prior year. If variance is negative, (i.e.: fewer students enrolled in prompted term vs. same term prior year), the variance will be shown in red.
  - At this time, Units Taken data by Department is not available. If a Department is selected in the Prompts, Units Taken data will be for the School to which the Department belongs.
  - Drilling on any value for Units Taken will drill to Enrollment Trends

Home Page: Business Questions

Some examples of business questions that might be answered by the data provided in the Drivers section of the Home Page are:

- Did we have the expected number of enrolled students in Term X?
- What is our enrollment for Term X compared to the same term last year?

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>Spring 2018</th>
<th>Spring 2017</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolled students</td>
<td>1,085</td>
<td>1,101</td>
<td>(16)</td>
</tr>
<tr>
<td>Units Taken</td>
<td>15,451</td>
<td>15,746</td>
<td>(295)</td>
</tr>
</tbody>
</table>

*Note: Enrollment count is based on the total school enrollment*
Enrollment Trends Drill: Overview
The Enrollment Trends drill provides a more detailed analysis of both the Enrolled Students and Units Taken counts from the Home Page. From the Enrollment Trends page, a user is able to analyze the enrolled student data using various demographic data points.

Enrollment Trends Drill: Elements

- **Status Check**
  - Performance tiles indicating Enrollment Count, Units Taken Completed, and Units Taken Dropped or Withdrawn
  - Data for performance tile is based on the prompted term and total school enrollment

- **Enrolled Students and Workload Graphs/Tables**
  - Graphs and tables display enrolled student counts and units taken for the prompted term and the same term, prior year
  - Graph is a stacked bar and is stacked by the demographic category selected by the View Selector
    - A **View Selector** is a drop down menu that allows the user to select from a variety of views of the same data
Both graphs and tables are driven by the same view selector

- Drilling
  - At this time, drilling is not enabled to Student level granularity due to FERPA restrictions

Enrollment Trends: Business Questions
Some examples of business questions that might be answered by the data provided in the Enrollment Trends section are:
- How many of our enrolled students are male and how does that compare to the same term, prior year?
- How many of our enrolled students are pursuing a Masters degree versus a Doctorate degree?
Operations Section

Home Page: Overview

The Operations Section of the Consolidated Performance Report is intended to provide insight into current workflow status of transactions as of the prompted fiscal year and accounting period. The high level indicators in this section may highlight areas of concern for workflow backlogs, as well as training opportunities.

Home Page: Elements

- **Travel and Expense Reimbursements**
  - For Release 1, the Operations Section is limited to Travel and Expense workflow data

- **# of Pending Items**
  - This is the count of items that have been created, but have not yet been approved, deleted, or withdrawn
  - **NOTE:** Pending items includes items that have been created (saved in Compass) but not submitted into workflow

- **Avg. Days Pending**
  - This is an average of the number of days each pending item has been in workflow
  - Days in workflow is calculated in calendar days
    - For items that have been created but not submitted, days pending is based on date created
    - For all other items, days pending is based on the date submitted into workflow

- **% Pushed Back**
  - The percentage of all items that have gone through workflow, regardless of their current workflow status, that had to be pushed back for revisions

<table>
<thead>
<tr>
<th># of Pending Items</th>
<th>Avg Days Pending</th>
<th>% Pushed Back</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel and Expense Reimbursements</td>
<td>1,447</td>
<td>88.70</td>
</tr>
</tbody>
</table>

- **Drilling**
  - **Clicking** on the words *Travel and Expense Reimbursements* will drill to overall [T&E Trends](#)
  - **Clicking** on either value in the pending columns will drill to [T&E Pending Analysis](#)
  - **Clicking** on the value in the % Pushed Back column will drill to [T&E Pushback Analysis](#)

Home Page: Business Questions

Some examples of business questions that might be answered by the data provided in the Operations section of the Home Page are:

- How many items are pending in workflow and how long have they been pending?
- Do we have training opportunities around transaction submission based on our % pushed back?
T&E Trends Drill: Overview
The T&E Trends analysis provides trending details related to Travel and Expense workflow statistics, as well as financial trends related to items posted to the ledger. Overall trends related to time spent in workflow, top 10 trends, and payment type trends are available.

T&E Trends Drill: Elements
- Status Check
  - Performance tiles indicating the number of pending workflow items, the average days pending, and the % of items pushed back
  - Clicking on either of the performance tiles related to pending items will drill to the T&E Pending Details
  - Clicking on the performance tile for % Pushed Back will drill to the T&E Pushback Details

- Travel and Expense Workflow Statistics
  - This graph shows the number of expense reports submitted by accounting period and serves as an indicator for transaction volume

- Travel and Expense Workflow Trends
  - The line-bar graph on the left represents the average time in workflow by accounting period
    - The stacked bar shows the breakdown of the time between creation and submission, and the time from submission to approval
    - The line represents the number of approved expense reports
The bar graph on the right compares average time in workflow for all expense reports, expense reports under $1500, and expense reports over $1500:

- Expense reports over $1500 require Central AP approval and therefore have more workflow stops than those under $1500.

**Travel and Expense Trends**

- This bar graph shows the dollar amount of posted travel and expense reports by accounting period.

- A view selector is included to provide additional views of expenses by accounting period.

- Clicking on the bars in the graph will drill to Expense Report Details.
- **Travel and Expense Top 10 Trends**
  - Top 10 based on the prompted values
    - **Destinations**
    - Clicking on any bar will drill to [Location Details](#)

![Top 10 Destinations by Total Expenses ($)](chart1)

- **Travelers (Person being reimbursed – not necessarily a traveler)**
  - Clicking on any bar will drill to [Traveler Details](#)

![Top 10 Travelers by Year-to-Date Amount](chart2)

- **Departments**
  - Clicking on any bar will drill to [Department Details](#)

![Top 10 Departments by Year-to-Date Amount](chart3)
• **Travel and Expense Payment Type Trends**
  
  o Pie chart on the left shows the breakdown of the use of corporate card vs. personal card

![Pie chart on the left shows the breakdown of the use of corporate card vs. personal card](image)

  ▪ **View Selector** allows user to select different views of payment type use

![View Selector allows user to select different views of payment type use](image)

  o Stacked bar chart on the right shows the breakdown of the use of corporate card vs. personal card across accounting periods

![Stacked bar chart on the right shows the breakdown of the use of corporate card vs. personal card across accounting periods](image)

  ▪ **View Selector** allows user to select different views of payment type use

![View Selector allows user to select different views of payment type use](image)
T&E Trends Drill: Business Questions
Some examples of business questions that might be answered by the data provided in the T&E Trends section are:

- What is our expense report volume, and do we experience seasonality?
- What is the average time spent in workflow for our transactions?
- Do travel and expense reimbursements spend longer in workflow based on time of year?
- Are high dollar expense reimbursements impacting our overall workflow times?
- Where are we traveling to the most and who is traveling there?
- How is our adoption of the corporate card and who are our biggest users?
T&E Pending Analysis Drill: Overview
The T&E Pending Analysis provides insight into the items pending in workflow, their aging, and the current status of those items.

T&E Pending Analysis Drill: Elements
  • **Performance Tiles**
    o Indicating total number pending as of the fiscal year and accounting period prompted, the average days pending relative to current date, and the number of pending items that have been pending for 5 days or longer
    o **Clicking on the performance tile** for the number of pending items that have been pending for more than 5 days will drill to Pending Details

  • **Stacked bar graph/table**
    o Stacked bar graph indicates the aging of pending items
    o Colors within the bar indicate the current workflow status for the items in pending status
    o **Clicking on any of the colors in the graph** will drive the table below the graph and provide details

<table>
<thead>
<tr>
<th># of Pending Expense Reports</th>
<th>Avg Days Pending</th>
<th># Pending Greater than 5 Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,447</td>
<td>89.70</td>
<td>1198</td>
</tr>
</tbody>
</table>

T&E Pending Analysis Drill: Business Questions
Some examples of business questions that might be answered by the data provided in the T&E Pending Analysis section are:
  • How long have my items been pending?
  • What is the current workflow status of pending items?
T&E Pushback Analysis Drill: Overview
The T&E Pushback Analysis is designed to give users insight into items that have been pushed back and require revisions. Having awareness of items being pushed back may identify areas for process improvement or training opportunities.

T&E Pushback Analysis Drill: Elements

- **Performance Tiles**
  - Performance tiles indicate the number of pushed back expense reports, and the % of expense reports that were pushed back
  - Clicking on the number of pushed back expense reports will drill to [Pushback Details](#)

<table>
<thead>
<tr>
<th># of Pushed Back Expense Reports</th>
<th>% Pushed Back</th>
</tr>
</thead>
<tbody>
<tr>
<td>3,348</td>
<td>7.00%</td>
</tr>
</tbody>
</table>

- Bar graph in the middle indicates the number of expense reports pushed back by accounting period
  - Clicking on any of the bars will drill to [Pushback Details](#)

  ![Bar Graph](image)

  - Stacked bar graph and table at the bottom show the current expense report status for items that have been pushed back
    - Clicking on the colors in the stacked bar will drive the content of the table to the right

  ![Stacked Bar Chart](image)

  ![Table](image)
T&E Pushback Analysis Drill: Business Questions
Some examples of business questions that might be answered by the data provided in the T&E Pushback Analysis section are:

- What ultimately happens to the expense reports that were sent back?
- Are certain submitters having more trouble with expense reports than others?
Expense Reports Detail Drill: Overview
The Expense Reports Detail Drill provides details related to posted expense reports as of the fiscal year and accounting period selected.

Expense Reports Detail Drill: Elements
- **Default View Columns: Definitions**
  - Accounting Period: The fiscal period to which the expense report posted
  - Division: The Division ID and Description to which the expense report posted
  - Department: The Department ID and Description to which the expense report posted
  - Program: The Program Code and Description to which the expense report posted
  - Event: The Event Code and Description to which the expense report posted
  - Expense Report Name: The name of the person on whose behalf the expense report was submitted
  - Expense Report ID: The 10 digit ID assigned to the expense report in Compass at the time the expense report was saved
  - Expense Report Amount: The dollar amount of the expense report

- **Additional columns available**
  - By right clicking on any column header, and choosing “Include Column”, there are a variety of columns available to be included in the report view

Expense Report Details Drill: Business Questions
An example of a business question that might be answered by the data provided in the Expense Report Details Drill is:
- Who has been reimbursed and for how much?
Location Details Drill: Overview
The Location Details Drill provides details, by expense report name, for the expense reports with the destination selected.

Location Details Drill: Elements
- **Default View Columns: Definitions**
  - Expense Report Destination: The destination selected by the expense report submitter as the location where expenses were incurred
  - Expense Report Name: Name of the individual for whom the reimbursement was submitted
  - Department: The Department ID and Description to which the expense report posted
  - Total Expenses: Dollar amount of all expense reports that the named individual has submitted for that destination

<table>
<thead>
<tr>
<th>Expense Report Destination</th>
<th>Expense Report Name</th>
<th>Department</th>
<th>Total Expenses ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Washington, DC</td>
<td>Thurman, Sandra L</td>
<td>816000- SPH: Global Health</td>
<td>10,805.45</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>Holmes Daniels, Sherida Renee</td>
<td>810005- SPH: Student Services</td>
<td>7,020.24</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>Thorpe, Kenneth E.</td>
<td>815000- SPH: Health Policy and Mngmnt</td>
<td>6,034.33</td>
</tr>
</tbody>
</table>

- **Clicking on the Total Expense** amount will drill to Traveler Details
  - This detail will list each expense report individually

Location Details Drill: Business Questions
An example of a business question that might be answered by the data provided in the Location Details Drill is:
- Which of our employees is traveling to our top 10 destinations and how much are we spending there?
Traveler Details Drill: Overview
The Traveler Details Drill provides details for each expense reported submitted on behalf of an individual.

Traveler Details Drill: Elements
- **Default View Columns: Definitions**
  - Expense Report Name: Name of the individual for whom the expense report was submitted
  - Charged Department: Department name to which the expense report posted
  - Expense Report ID: 10 digit number assigned to the expense report in Compass at the time it was saved
  - Expense Report Destination: The destination selected by the expense report submitter as the location where expenses were incurred
  - Expense Report Amount: Total dollar amount of the expense report

<table>
<thead>
<tr>
<th>Expense Report Name</th>
<th>Department</th>
<th>Expense Report ID</th>
<th>Expense Report Destination</th>
<th>Expense Report Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Livingston, Jeannette L</td>
<td>School of Law</td>
<td>0000661255</td>
<td>New York, NY</td>
<td>4,212.42</td>
</tr>
<tr>
<td>Livingston, Jeannette L</td>
<td>School of Law</td>
<td>0000631385</td>
<td>White Plains, NY</td>
<td>3,464.80</td>
</tr>
<tr>
<td>Livingston, Jeannette L</td>
<td>School of Law</td>
<td>0000658767</td>
<td>New Orleans, LA</td>
<td>3,308.85</td>
</tr>
</tbody>
</table>

Traveler Details Drill: Business Questions
An example of a business question that might be answered by the data provided in the Traveler Details Drill is:
- Where are our travelers going and how much are they spending when they go?
Department Details Drill: Overview
The Department Details Drill provides details, by expense report name, for the expense reports posted to the Department selected.

Department Details Drill: Elements
- Default View Columns: Definitions
  - Expense Report Name: The name of the individual for whom an expense report has been submitted
  - Department: The Department ID and Description to which the expense report has posted
  - FYTD Expense Report Amount: The dollar amount, year-to-date, of the expense reports reimbursed to the expense report name

<table>
<thead>
<tr>
<th>Expense Report Name</th>
<th>Department</th>
<th>FYTD Expense Report Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sullivan, Patrick Sean</td>
<td>814000- SPH: Epidemiology</td>
<td>39,842.07</td>
</tr>
<tr>
<td>Zlotorzynska, Maria</td>
<td>814000- SPH: Epidemiology</td>
<td>19,334.52</td>
</tr>
<tr>
<td>Stephenson, Deborah K</td>
<td>814000- SPH: Epidemiology</td>
<td>18,217.98</td>
</tr>
</tbody>
</table>

- Clicking on the Total Expense amount will drill to Traveler Details
  - This detail will list each expense report individually

Department Details Drill: Business Questions
An example of a business question that might be answered by the data provided in the Department Details Drill is:
- Which of the individuals in a Department are being reimbursed and for how much?
Pending Details Drill: Overview
The Pending Details Drill provides details for expense reports that have been pending in workflow for more than 5 days.

Pending Details Drill: Elements
- **Default View Columns: Definitions**
  - Department: Department ID and Description of the submitter who has created and submitted the expense report
  - Expense Report Submitter: The name of the individual who has created and submitted the expense report
  - Expense Sheet Status: The current status of the expense report
  - Last Action: The last workflow action taken on the expense report
  - # of Days Pending: The number of days the expense report has spent in workflow.
    - Items with **Pending sheet status** have been created but not submitted
      - Days Pending calculated from Creation Date (date saved)
    - Items with all other sheet statuses have been submitted
      - Days Pending calculated from Submit Date

<table>
<thead>
<tr>
<th>Department</th>
<th>Expense Report Submitter</th>
<th>Expense Sheet Status</th>
<th>Last Action</th>
<th># of Days Pending</th>
</tr>
</thead>
<tbody>
<tr>
<td>733030- SON: Medicine: Nephrology</td>
<td>Mary Williams</td>
<td>Pending</td>
<td>-</td>
<td>172</td>
</tr>
<tr>
<td>734000- SON: Neurosurgery: Admin</td>
<td>Cheryl-Ann Esmond</td>
<td>Pending</td>
<td>-</td>
<td>172</td>
</tr>
<tr>
<td>734000- SON: Neurosurgery: Admin</td>
<td>Nicholas Eouils</td>
<td>Pending</td>
<td>-</td>
<td>172</td>
</tr>
</tbody>
</table>

Pending Details Drill: Business Questions
An example of a business question that might be answered by the data provided in the Pending Details Drill is:
- How many days pending are the items that are currently pending in workflow?
Pushback Details Drill: Overview
The Pushback Details Drill provides details for expense reports that have been pushed back to the submitter for revisions.

Pushback Details Drill: Elements
- Default View Columns: Definitions
  - Department: The Department ID and Description for the department to which the expense report submitter belongs
  - Expense Report Submitter: The name of the individual who created and submitted the expense report
  - Expense Sheet ID: The 10 digit number assigned to an expense report when it is saved in Compass
  - Expense Sheet Status: The current status of the expense report

<table>
<thead>
<tr>
<th>Department</th>
<th>Expense Report Submitter</th>
<th>Expense Sheet Id</th>
<th>Expense Sheet Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>010501- Office of President</td>
<td>Jeffrey Sowell</td>
<td>0000641979</td>
<td>Paid</td>
</tr>
<tr>
<td>010501- Office of President</td>
<td>Jeffrey Sowell</td>
<td>0000644364</td>
<td>Paid</td>
</tr>
<tr>
<td>013001- University Secretary Operating</td>
<td>Candice Hall-Wilcox</td>
<td>0000648077</td>
<td>Paid</td>
</tr>
</tbody>
</table>

- Additional columns available
  - By right clicking on any column header, and choosing “Include Column”, there are a variety of columns available to be included in the report view

Pushback Details Drill: Business Questions
An example of a business question that might be answered by the data provided in the Pushback Details Drill is:
- Which submitters have had expense reports pushed back and what is the current status of those expense reports?

Return to Table of Contents