

TRAVEL APPLICATION

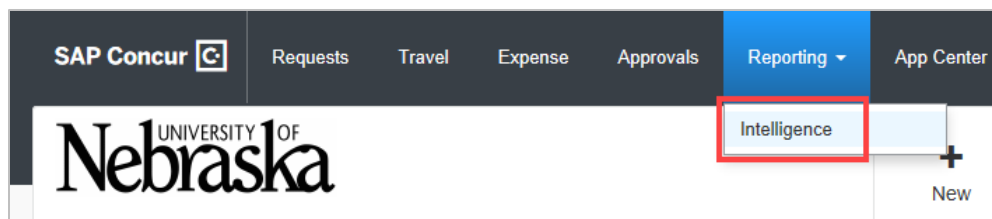
Reporting

HELPFUL HINTS

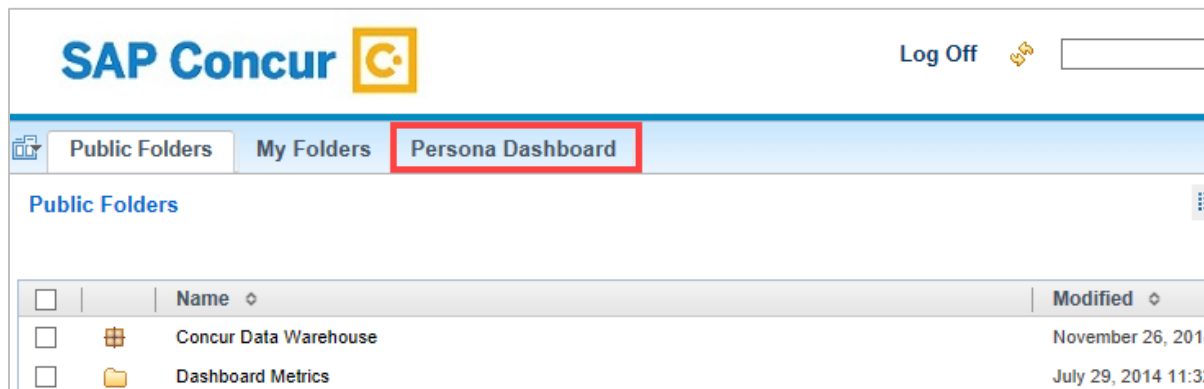
- Employees designated as a BI Manager (i.e. supervisor) can access the supervisor dashboard. If you have been approving expense reports in the Concur Travel & Expense application, then you are a BI Manager.
- The BI Manager sees the data of his/her direct reports.
- The reporting feature provides quick and easy access to data and visual indicators that explain how a metric is calculated.
- To successfully run reports in Concur, Internet Explorer is the preferred web browser.

PROCEDURE

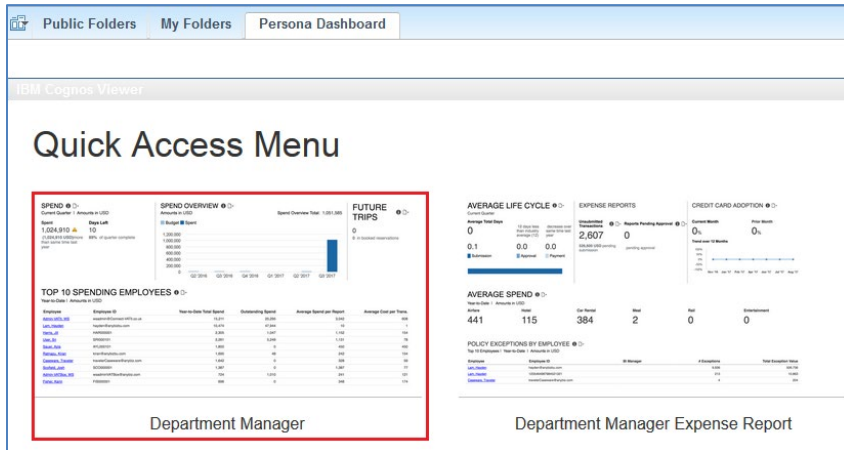
1. From within Concur, click on the reporting tab and select *Intelligence* from the dropdown menu.



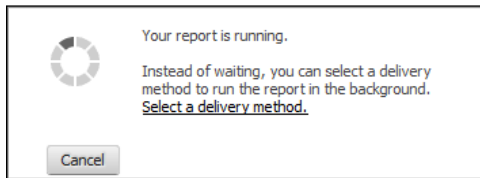
2. Open the persona dashboard.



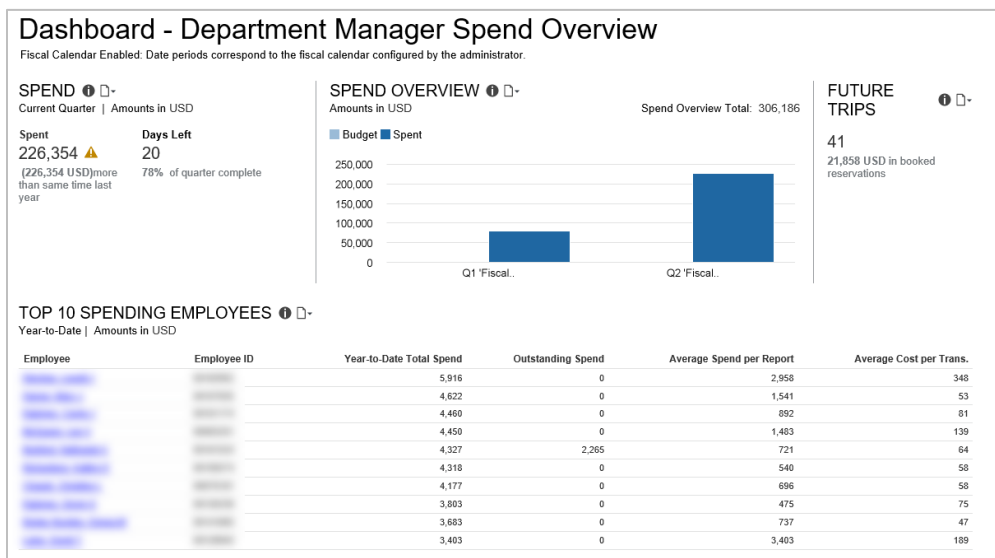
- Within the quick access menu, click anywhere on the *Department Manager* or *Department Manager Expense Report* option to select a report.



A pop-up will be displayed, indicating the report is running.



- The top report/results will appear on your screen. Note: If a different delivery method is preferred, refer to the section at the end of this document.



SUPERVISOR DASHBOARD

Updated December 12, 2018

5. Additional functionality is available from the results screen.

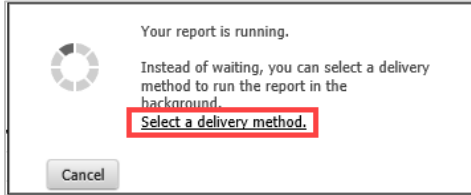
Tool Tips **i** explain how a metric is calculated. Click the **i** icon within a specific section for detailed information.

Additional reporting options are available for each section from a drop-down list **☰**.

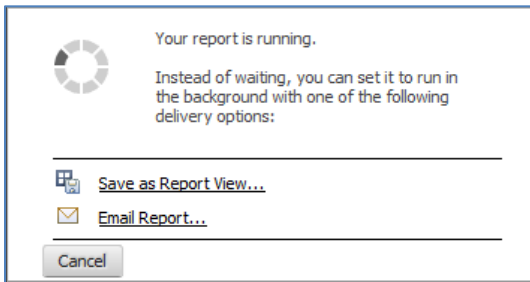
ADDITIONAL INFORMATION

You can save the report view or email the report. Once you have run the report, click on the **▶** icon.

A pop-up will appear. Click on *Select a delivery method*.



Make a selection from the two options provided: *Save as Report View* or *Email Report*.



If selecting email report, enter an email address for the recipient and include comments in the body. Click on .

