

TRAVEL APPLICATION

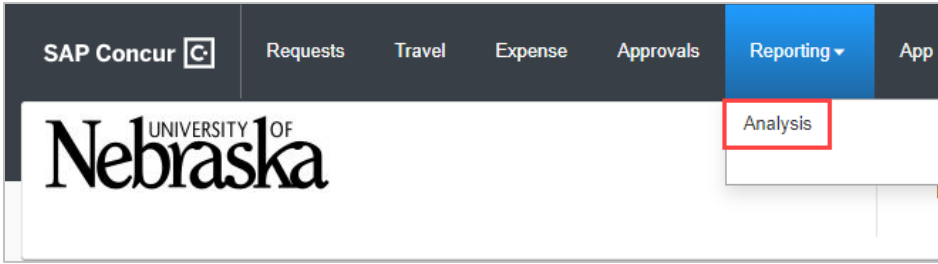
Reporting

HELPFUL HINTS

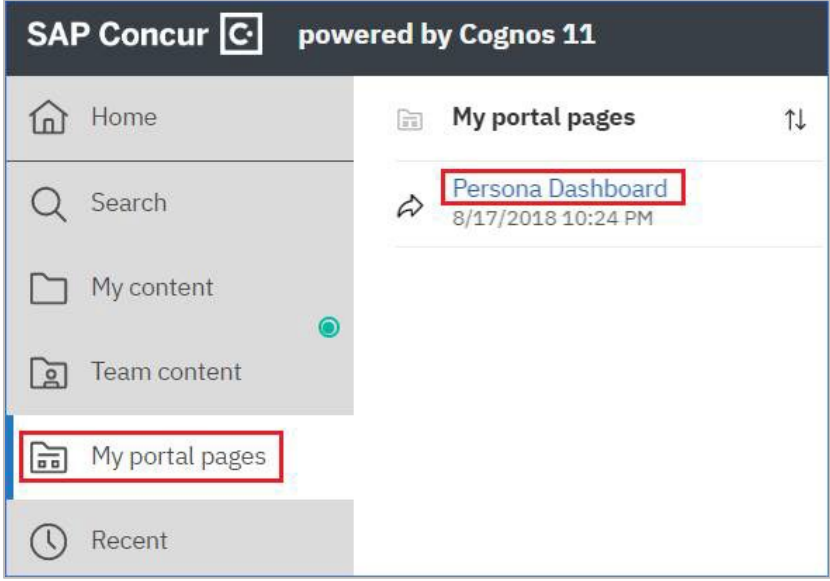
- Employees designated as a BI Manager (i.e. supervisor) can access the supervisor dashboard. If you have been approving expense reports in the Concur Travel & Expense application, then you are a BI Manager.
- The BI Manager sees the data of his/her direct reports.
- The reporting feature provides quick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

PROCEDURE

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



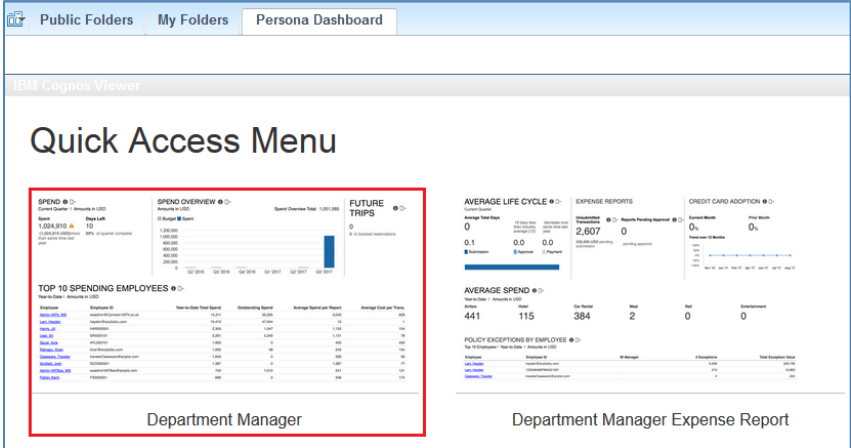
2. Select *My Portal* pages, then *Persona Dashboard*.



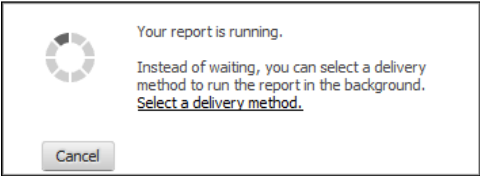
SUPERVISOR DASHBOARD

Updated March 6, 2023

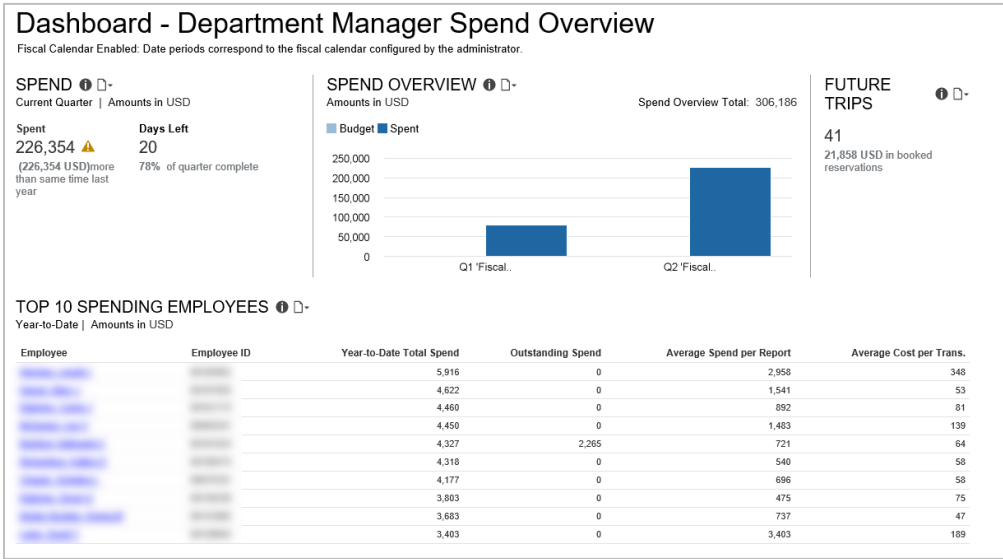
3. Within the quick access menu, click anywhere on the *Department Manager* or *Department Manager Expense Report* option to select a report.



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



4. 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 March 6, 2023

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.

SPEND **i**

Current Quarter **Current Quarter Spend**

Spent
2,366,569
(2,366,569 USD more than same time last year)

Calculation
Spend = Spend + Accruals
Budget= Entries made by the BI Manager in the Profile/Reporting Settings/Reporting Budget fields
NOTE: If you don't enter your quarterly budget, you'll only see data for spend and not any comparative data to your budget.
Spend reported on expense records
Accrual from credit card transactions.

[Learn More](#)

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

SPEND OVERVIEW **i**

Amounts in USD

■ Budget ■ Spent

Total: 2,607,143

- Spend Overview Details
- Expense Entry Analysis Grouped by Employee
- Expense Entry Analysis grouped by Expense Type
- Expense Accrual
- Unassigned Credit Card Transactions
- Top Spenders by Expense Type
- Airfare Summary
- Car Rental Summary
- Hotel Summary

Q4 'Fiscal.. Q1 'Fiscal.. Q2 'Fiscal..

ADDITIONAL INFORMATION

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

reporting7.concursolutions.com/cognos/cgi-bin/cognosisapi.dll#

Run Report

Dashboard - Department Manager Spend Overview

Fiscal Calendar Enabled: Date periods correspond to the fiscal calendar configured by the administrator.

SPEND **i**

Current Quarter | Amounts in USD

Spent 226,354
(226,354 USD) more than same time last

Days Left 20
78% of quarter complete

SPEND OVERVIEW **i**

Amounts in USD

Spend Overview Total: 306,186

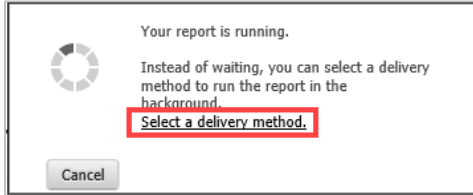
■ Budget ■ Spent

250,000
200,000

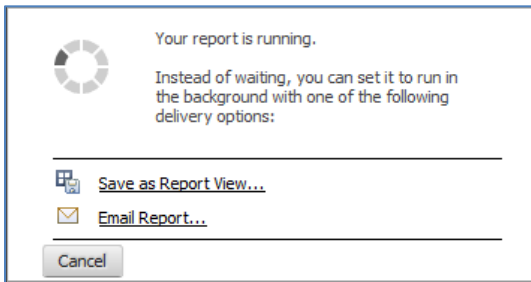
FUTURE TRIPS **i**

41
21,858 USD in booked reservations

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 .

