Accessing Reporting in Concur

Dashboard and UC Public Folders

What are Concur Cognos Reports?

- Reports from the Concur Travel & Expense System are accessed through the Reporting function within Concur, which is known as Concur Cognos.

- Concur Cognos is used to obtain information from Concur by either running reports on-demand, or accessing customized reports that have been created by UC.

- Reporting is based off of direct report hierarchy. Any approver in Concur has been granted access to reporting. Therefore any sort of report a default approver/COA would run, would contain information for all employees who report to that approver. (For example, BI Manager could be a role that you are assigned in Concur)

- Dashboard reports are the most commonly used reports.

- Public Folders contain standard reports or custom reports created by UC.

Dashboard Reports

With the Dashboard, you can review all spending details for your organization on the Spend tab with in Department Manager and view expense report and budget details on the Expense Management Overview.

1. Select Reporting > Intelligence or Intelligence – BI Manager depending on your assignments in Concur.
2. Click on **Persona Dashboard** Tab

![Persona Dashboard Tab](image1.png)

- Public Folders
- My Folders
- **Persona Dashboard**
- Concur Dashboard

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concur Data Warehouse</td>
</tr>
<tr>
<td>Dashboard Metrics</td>
</tr>
<tr>
<td>Intelligence - Standard Reports</td>
</tr>
<tr>
<td>University of Cincinnati (p0019254xrt)</td>
</tr>
</tbody>
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3. Select **Department Manger** or **Expense Management Overview**.

![Quick Access Menu](image2.png)

**Quick Access Menu**

- Department Manager
- Expense Management Overview
Public Folders

Contain any Concur Standard Report along with any report the University of Cincinnati has created for an Business Office.

1. Click on Public Folders

2. Click University of Cincinnati Folder

3. Click on the Report name to run the report. (Unassigned Credit Card Transactions)
4. Select the date span you need the report to run by selecting the Month then date

5. Click Finish
Reports will run in standard HTML view. It’s recommend to run reports in Excel 2007 Format.

6. Click on HTML icon > View in Excel Option > View in Excel 2007 Format
You can access additional training and support information by clicking on **Help** at the top-right of any Concur screen.

**Tips to remember:**

- Internet Explorer is the preferred web browser for Concur Cognos reports to run properly. Google Chrome may work but is not supported.

- Data contained in reports are not available in real-time. There is a day delay.

- An Approver may only have two reporting delegates. Once permission has been granted the user must act on behalf as that individuals delegate to access reporting.