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# VPF QUICK CARD

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## How to Grant Access to Cognos Travel Reporting

### INTRODUCTION

Reporting on unexpensed travel data has two authorization paths. The first type of authorization is by the Cost Object that the Concur transaction is associated with. If a user has Roles authorization to see expenses for that Cost Object, then they will automatically have the same access to expenses in Cognos Travel Reporting.

The second type of authorization is by the Travel Card. DLC Financial Primary Authorizers would need to grant this new Roles authorization to any user who has a business need to see all Unexpensed transactions on a travel card, regardless of cost object association (e.g. across DLCs, Schools or administrative units). This authorization applies unexpensed travel data available in the Data Warehouse.

More details on the data access policies for Unexpensed Travel can be found [here](#).

**Standard reporting on travel data contains additional filtering, which limits report result to only those transactions on which the user may need to take action.**

### Example

The standard Travel reports in Cognos will display:

- Unassigned transactions where the user has Financial Authorization on the default Cost Object, and Unassigned transactions where the user has Travel Card Authorization on the MIT Travel Card that incurred the charge
- Assigned transactions where the user has Financial Authorization on the Cost Object to which the transaction has been assigned

This Quick Card walks a DLC Financial Primary Authorizer through how to grant individuals View By Travel Card access to Cognos Travel Reporting data.

For questions about the process outlined below or to find out who the Primary Authorizer is associated with a particular card, DLC administrators should contact [travelsupport@mit.edu](mailto:travelsupport@mit.edu)

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## STEP 1

Go to: <https://rolesapp.mit.edu/> and Click **Create Authorization** button

The screenshot shows the 'Roles Database' interface. At the top, there is a black header with the text 'Roles Database'. Below the header, there is a yellow button labeled '[+] Create Authorization'. Underneath, there is a section titled 'Look up Authorizations' with a dropdown menu currently showing 'Authorizations for a person'. Below that is a section titled 'Select Criteria' which contains a table with columns 'Apply', 'Criteria Name', and 'Value'. The table has several rows with checkboxes in the 'Apply' column and input fields or radio buttons in the 'Value' column. At the bottom of the form, there are two yellow buttons: 'Find Matching Authorizations' and 'Save Default Criteria'.

Apply	Criteria Name	Value
<input checked="" type="checkbox"/>	Person (Kerberos name) =	SECHRIST
<input type="checkbox"/>	Function category =	SAP - SAP Financial
<input type="checkbox"/>	Function =	REPORT BY CO/PC
<input type="checkbox"/>	Qualifier code =	null <a href="#">Lookup Qualifiers</a>
<input type="checkbox"/>	do_function flag =	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/>	Is authorization active today?	<input checked="" type="radio"/> Yes <input type="radio"/> No

## STEP 2

Type in the \*Kerberos Name of the user you would like to give Authorization to

Select \*Category “SAP – SAP Financial” and \*Function Name “VIEW TRAVEL BY CARD”

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[+] Create Authorization

**Authorization Detail**

\* Kerberos Name (or Last name)  Name

\* Category

\* Function Name

\* Function Description

Qualifier Code  [Lookup Qualifiers](#)

Qualifier Type  Name

\* Effective Date  Expires  mm/dd/yyyy

[More Detail](#)

## STEP 3

Click **Lookup Qualifiers** link to the right of the “Qualifier Code” form field

[+] Create Authorization

**Authorization Detail**

\* Kerberos Name (or Last name)  Name

\* Category

\* Function Name

\* Function Description

Qualifier Code  [Lookup Qualifiers](#)

Qualifier Type  Name

\* Effective Date  Expires  mm/dd/yyyy

[More Detail](#)

**Look up Authorizations**

Authorizations for a person

**Select Criteria**

Apply  Criteria Name  
 Person (Kerberos name) =  
 Function category =

**Qualifier List** close | x

- [-] ALL\_CARDS - All Travel Credit Cards
  - [-] OHPCO - MIT Corporation
    - [-] OHPCO - President Node

From this window you can select the group of Travel Cards/Users you would like the individual to have reporting access to.

*Please note your drill down will be limited to what reporting access you as the Financial Authorizer have. You will not have a complete list as shown below.*

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The screenshot shows the 'Create Authorization' form. The 'Authorization Detail' section includes fields for Kerberos Name (devinmw), Category (SAP - SAP Financial), Function Name (VIEW TRAVEL BY CARD), Function Description (Can view travel expenses by credit card), Qualifier Code, Qualifier Type (CARD), and Effective Date (09/11/2013). A 'Qualifier List' dropdown menu is open, showing a tree structure of organizational units. The selected unit is 'DHPCC00116 - VP for Finance (A)'. Other units include 'ALL\_CARDS - All Travel Credit Cards', 'DHPCC0000 - Provost Node', 'DHPCC0001 - Executive Vice President & Treasurer', 'DHPCC00100 - Executive VP & Treasurer's Office', 'DHPCC00102 - Information Services & Technology', 'DHPCC00103 - Audit Division', 'DHPCC00104 - VP for Resource Devel Node', 'DHPCC00105 - VP for Human Resources Node', 'DHPCC00108 - Department of Facilities', 'DHPCC00109 - Dir of Env Prog & Risk Mgmt/Sr Counsel', 'DHPCC00110 - Campus Police (A)', 'DHPCC00113 - Treasurer of the Corporation', 'DHPCC00115 - EHS Headquarters Office', 'DHPCC00116 - VP for Finance (A)', 'DHPCC00117 - Office of Major Agreements (A)', 'DHPCC002 - VP & Secretary of Corp Node', 'DHPCC003 - Association of Alumni/ae', 'DHPCC004 - Office of the President', 'DHPCC005 - COFHE', and 'DHPCC007 - Chancellor's Office'.

## STEP 4

Select DLC/area you would like to grant reporting access for (in this example we have selected **VP for Finance** area).

Please note that **VIEW TRAVEL BY CARD** access can be granted at the Profit Center level or by individual cardholder

Click **Create** button to finalize users new Role/Authorization

The screenshot shows the 'Create Authorization' form with the 'Authorization Detail' section. The 'Qualifier Code' field is now populated with 'DHPCC00116' and the 'Qualifier Type' field is 'CARD'. The 'Effective Date' is '09/11/2013'. The 'Create' button is highlighted in yellow.