



## Accessing PCard Reports in Cognos

**Overview:** This job aid demonstrates how to access the **UPL 010 - PCard Spending Limits** and **UPL 011 - RC PCards** reports in Cognos BI. Users will need to have the BI-FIN-PUR-Central or BI-FIN-PUR-University roles assigned to access these reports.

### Obtaining Access

1. Log in to [earm.itservices.msu.edu](http://earm.itservices.msu.edu).
2. Select **Generic** for the type of access request. Click **Next** at the bottom of the page.

☐ VPN Add, change or delete access to MSU VPN. [Details](#)

☒ Generic Add or remove access to miscellaneous systems not listed above or on the [ARM Index](#). [Details](#)

\*Not sure what to do? [Ask for help](#).

**Next**

Provided by [IT Services](#)

3. Add the NetID of the user that needs access to these PCard reports and click **Add**. Click **Next** at the bottom of the page.

**Select end users**

Last name, first name or MSU NetID of the user(s) to receive access

**Add**

Note: You can add as many users as necessary for your request

4. In the **Description of requested access** textbox, add: "Please add the user(s) to the BI-FIN-PUR-University role in Cognos."
5. In the **Business need/Comments** textbox, add: "The user will use the reports to monitor and audit PCard usage to ensure compliance with university policy."
6. Submit the eARM and await approval from IT Services.

### PCard Spending Limit Report

This report will display data for all PCards accounts of which you are a cardholder, fiscal officer, account manager, or account supervisor.

1. Log in to [ebs.msu.edu](http://ebs.msu.edu) and click the **Business Intelligence and Analytics** tile.

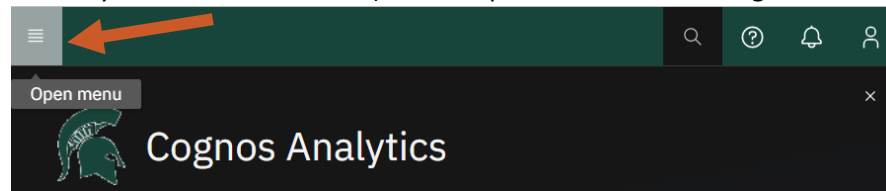
MICHIGAN STATE UNIVERSITY Home ▾

Enterprise Business Systems My Approvals & Workflow My Time & Payroll My Personal

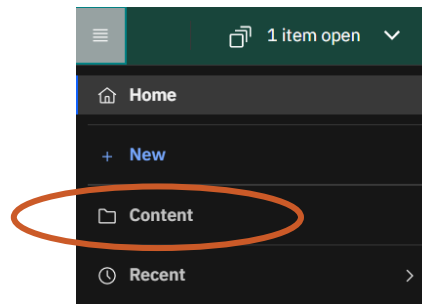
<b>U-Track</b> Campus Package  New Window Opens	<b>Applicant Tracking System</b> PageUp  New Window Opens	<b>Financial System</b>  New Window Opens	<b>Business Intelligence and Analytics</b>  New Window Opens
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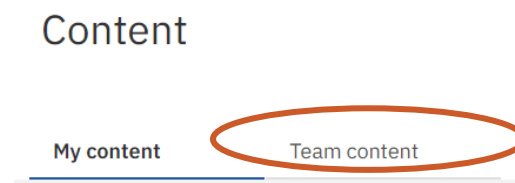
2. Open the menu (indicated by three horizontal lines) in the top left corner of the Cognos window.



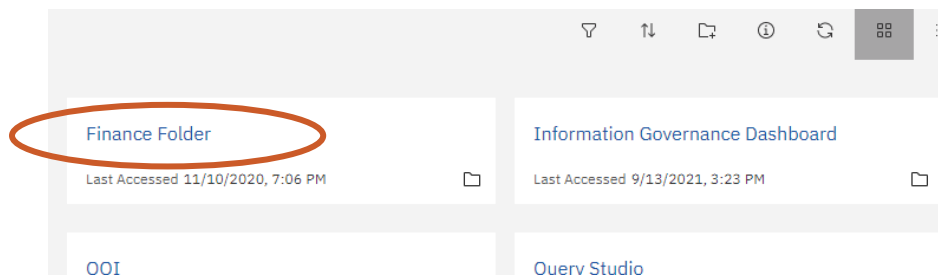
3. Select **Content**.



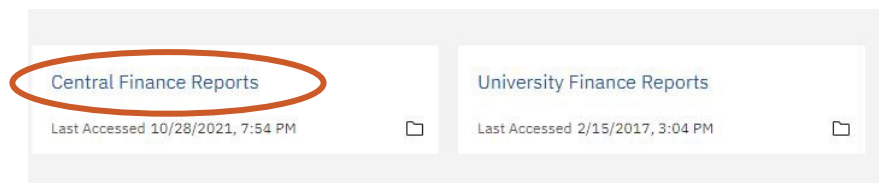
4. Select the **Team Content** tab.



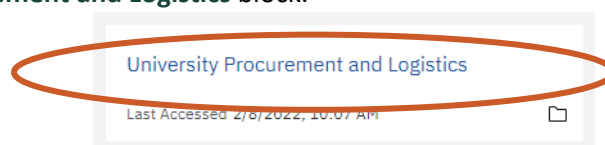
5. Select the **Finance Folder**.



6. Select the **Central Finance Reports**.

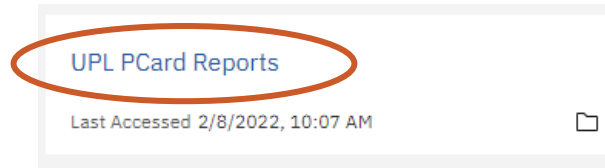


7. Select the **University Procurement and Logistics** block.





8. Open the **UPL PCard Reports** block.

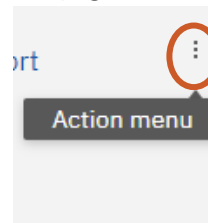


9. To run the **UPL 010 – Spending Limits Report** report:

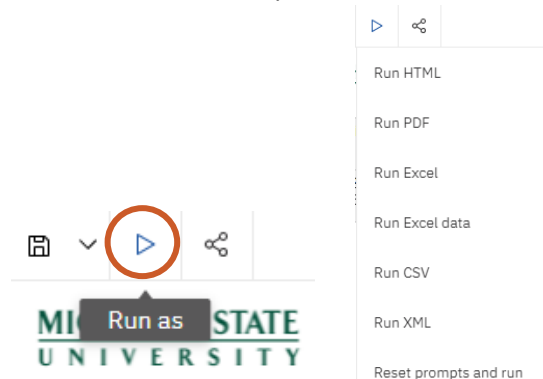
- a. Select the box to automatically run and display the report within your Cognos window, or
- i. **Note:** there may be page navigation buttons on the bottom left of your HTML report, indicating you have more than one page's worth of data. Use the **Page up** and **Page down** buttons to navigate through your report.

[Top](#) [Page up](#) [Page down](#) [Bottom](#)

- b. Hover over the report box and select the **Action menu** (indicated by three dots that appear on the right). Select “run as” to export to another data format (e.g. PDF or Excel).



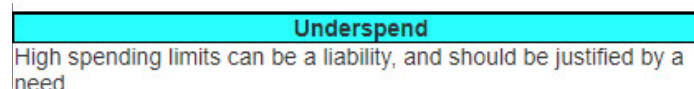
10. If you ran the report in your Cognos window (following Step 9A), you can hit the **Run as** button (right-pointing triangle) in the top left of the report screen to run and export the data in a secondary format (e.g. PDF or Excel).



11. Data that is highlighted in red represents monthly spending that exceeds the card's limit.



12. Data that is highlighted in teal represents a cardholder that has the increased PCard monthly spending limit but has not used that increased limit within the previous twelve months. Consider whether that increased spending limit is still appropriate for the cardholder's needs.

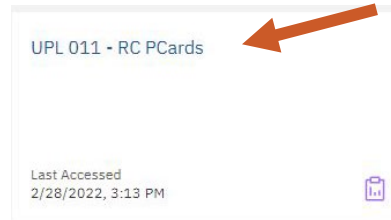




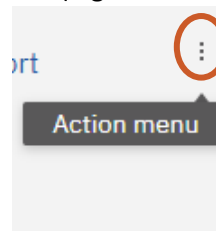
## RC PCards Report

This report will display data for all PCards with a default account number beginning with “RC” on which you are a cardholder, fiscal officer, account manager, or account supervisor.

1. Follow Steps 1 - 8 of the **PCard Spending Limit Report** above.
2. To run the **UPL 011 – RC PCards Report** report:
  - a. Select the box to move on to Step 3, or



- b. Hover over the report box and select the **Action menu** (indicated by three dots that appear on the right). Select “run as” to export to another data format (e.g. PDF or Excel). Proceed to Step 3.



3. Select a **Start Date** and **End Date** for your report. The report will only show purchases for that timeframe. Click **Next**.

Start Date

End Date

Feb 2022

Feb 2022

Sun Mon Tue Wed Thu Fri Sat

Sun Mon Tue Wed Thu Fri Sat

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28

27 28

Cancel Next >

4. If you ran the report in your Cognos window (following Step 2A), you can hit the **Run as** button (right-pointing triangle) in the top left of the report screen to run and export the data in a secondary format (e.g. PDF or Excel).
5. This report contains three types of information:
  - a. The left table reflects spend on **RC PCards** against **RC accounts**
  - b. The top table reflects spend on **RC PCards** that is paid against **Non-RC accounts**
  - c. The bottom table reflects spend on **non-RC PCards** that is paid against **RC accounts**
  - d. Based on the spending patterns on your cards/accounts, you may not have data in some (or any) of these tables.