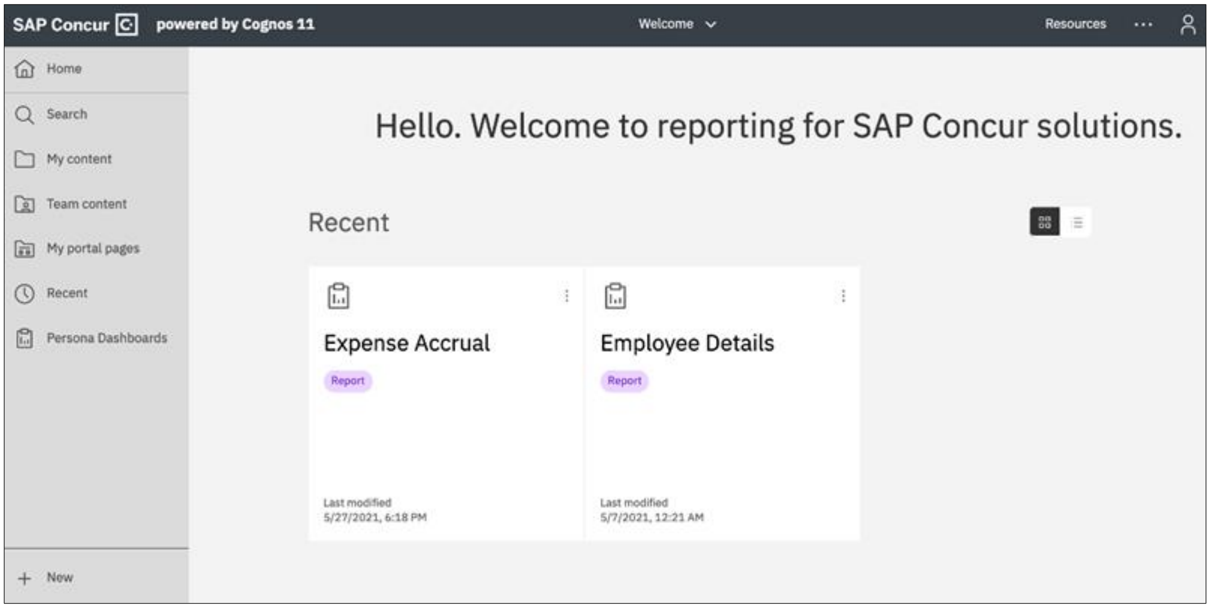
The **Concur Reporting** module allows you to run Columbia specific and Concur standard reports containing University-wide travel and expense data. All reports can be found in the Team content folder.

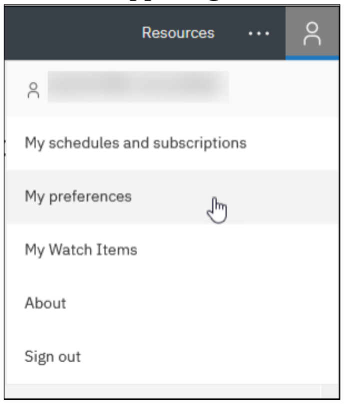
Accessing the Concur Reporting Module

1. Log into **Concur**.
2. Click the Home dropdown and select **Reporting** and **Intelligence**.
   The Report Module appears in a new tab in your browser. The reports that you have recently run would appear in Recent, which you toggle between Tile or List view. The first time you run the Reporting module, this will be blank.

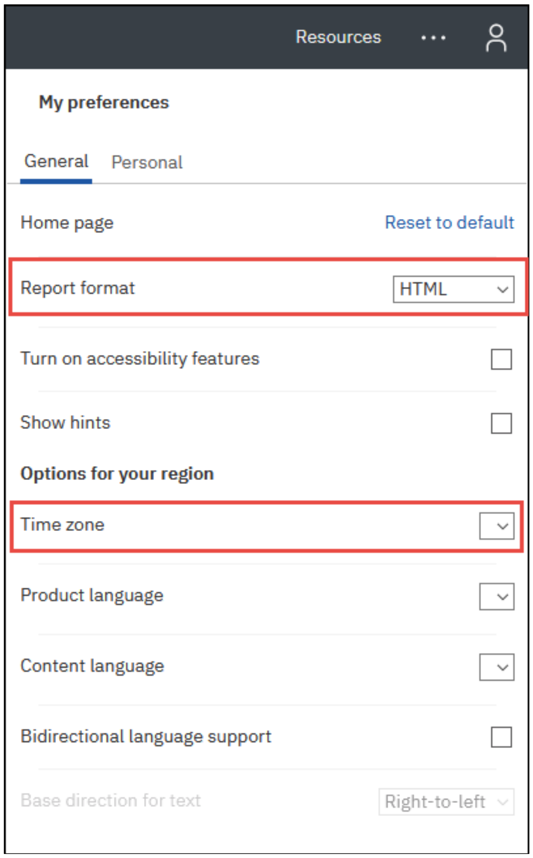


Setting My Preferences

1. From the upper right corner of the Reporting Module screen, click the **Personal** icon and **My Preferences**.



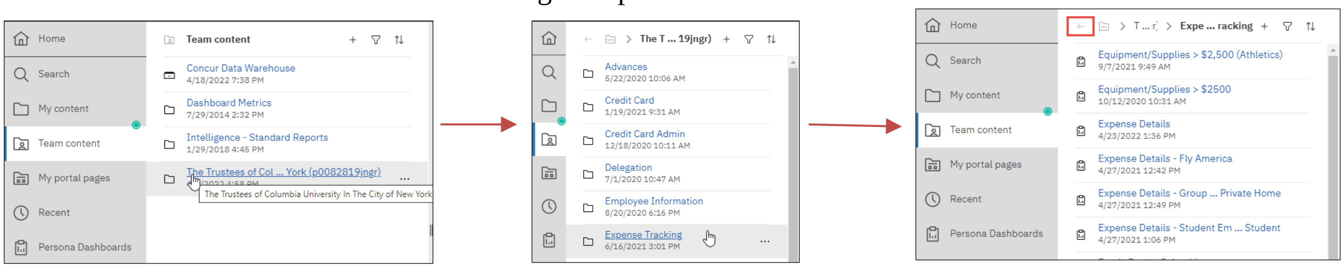
   The General tab on the My Preferences pane appears.



2. Select the default **Report format**. When you click a Report to run, this will be the default report format. You can use the Run As feature to select a different format for individual reports.
3. Set your preferred **Time zone** from the dropdown and select your preferred time zone.

Navigating to Reports

1. Click the **Team content** folder from the Navigation pane.



2. Click through sub-folders until you locate the report you want to run. Columbia specific folders and reports can be found within the **Trustees of Columbia University in the City of New York folder**.

   You can use the back arrow  icon at the top of the Navigation pane to go back to the previous folder level.

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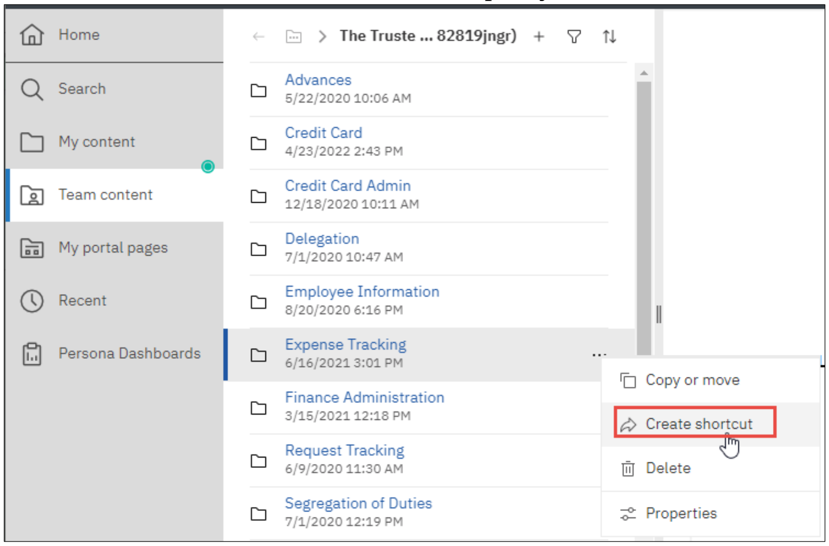
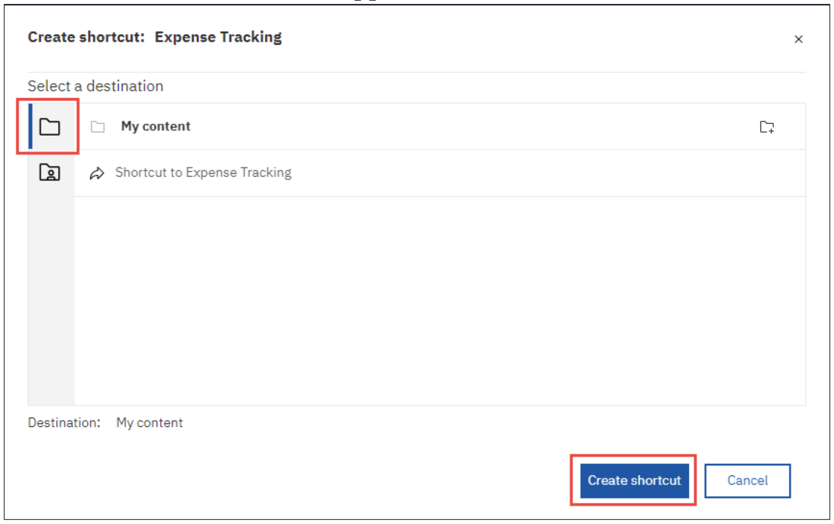
Creating a Folder Shortcut

You can select to create a shortcut to a folder or report so that you have quick access to it in your My content folder.

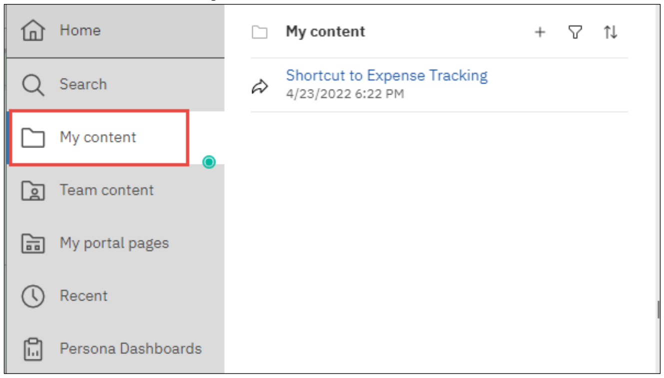
1. Navigate to the folder or report.
2. In the **More** ••• icon for the folder or report you want to make a shortcut, click **Create Shortcut**.



The Create shortcut window appears.

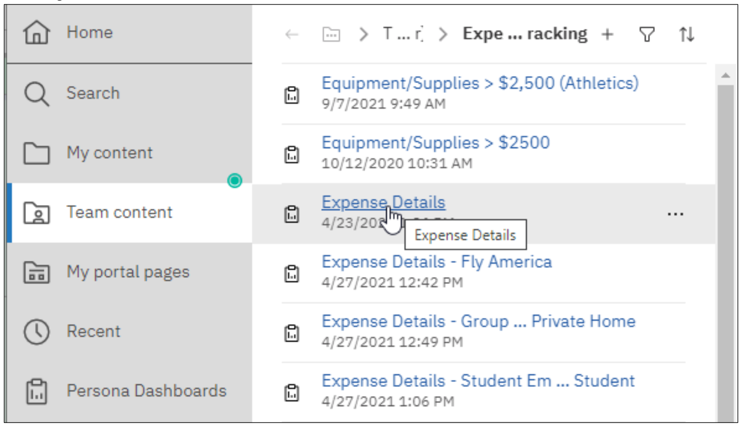


3. Select the **My content** folder as the destination and click **Create shortcut**. The shortcut to the folder or report can be found in the My content folder.

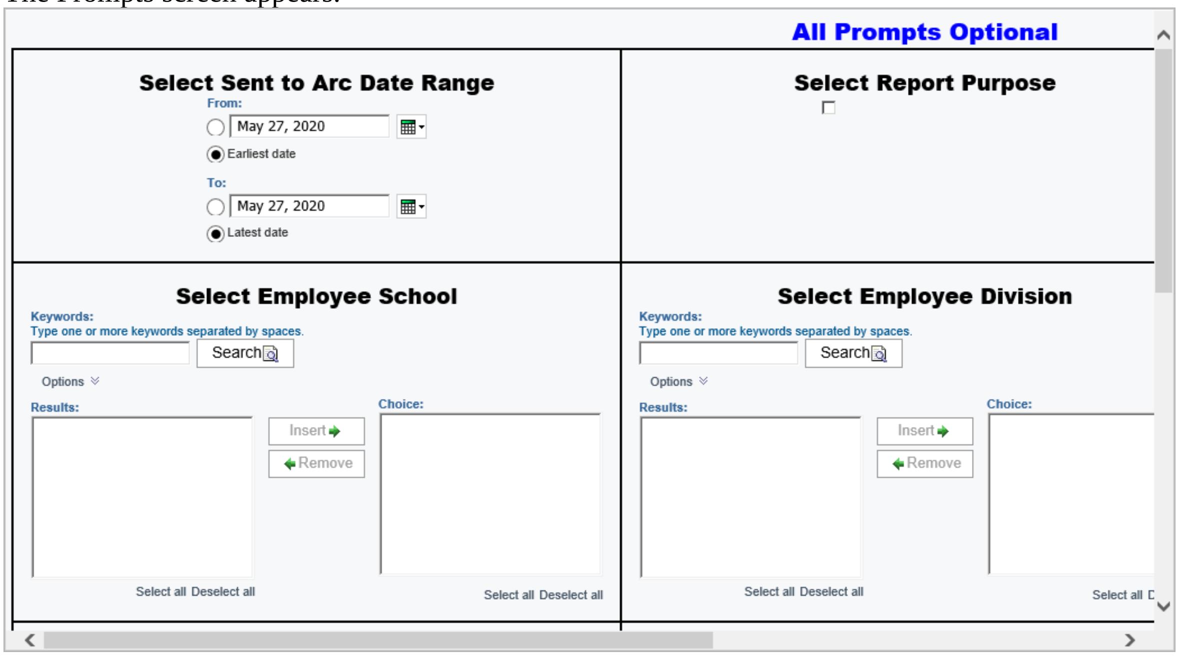


Running Reports

1. Navigate to the report you want to run and click the report name. The report will run in the default format indicated in My Preferences.



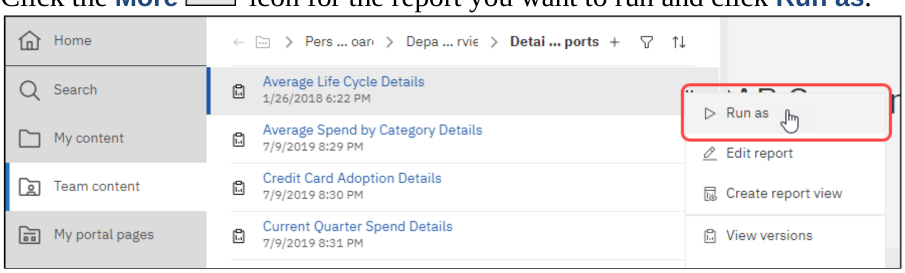
The Prompts screen appears.



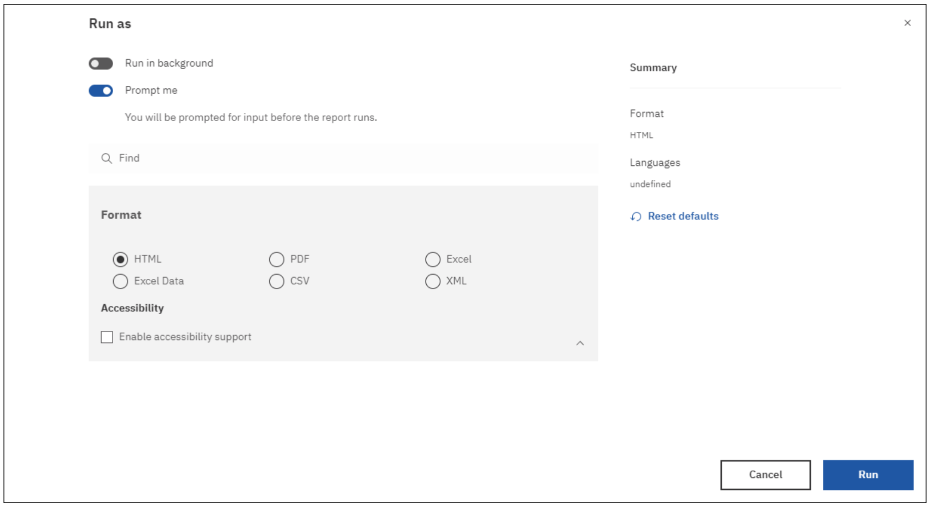
2. Enter the required or desired optional **Prompts.**
3. Click **Finish** at the bottom of the screen. The report may take some time to render depending on the amount of data.

Running Reports using Run as

1. Navigate to the report you want to run.
2. Click the **More** icon for the report you want to run and click **Run as**.



The **Run as** screen appears.



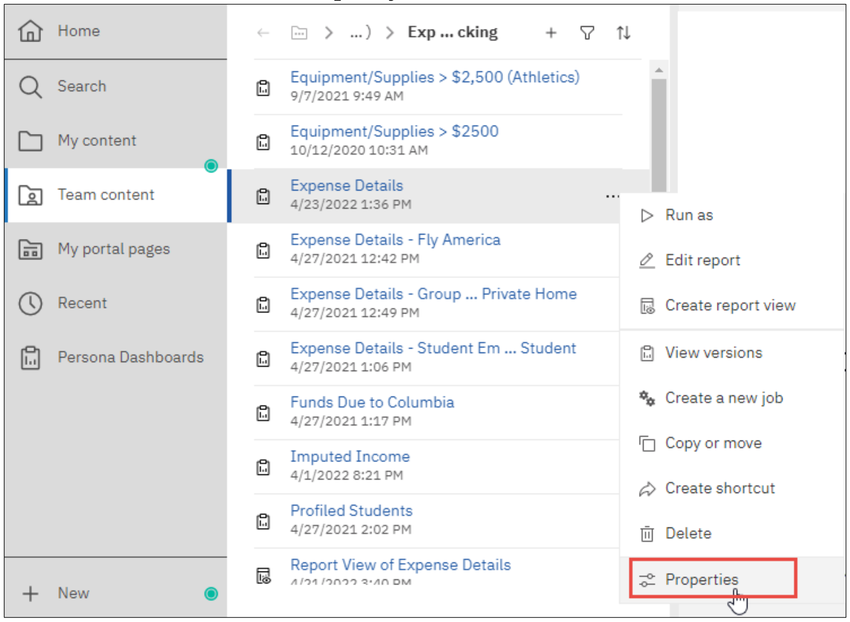
3. Optionally, You can select the **Run as background** option to run your report in the background, **Now** or **Later** for a set time, so you can proceed with other tasks if a larger report requires time to run.

4. Select the report **Format**. Select only HTML, Excel 2007, or Excel 2002.
5. Click **Run**. The Prompts screen appears.
6. Enter the required or desired optional **Prompts.**
7. Click **Finish** at the bottom of the screen. The report may take some time to render depending on the amount of data.

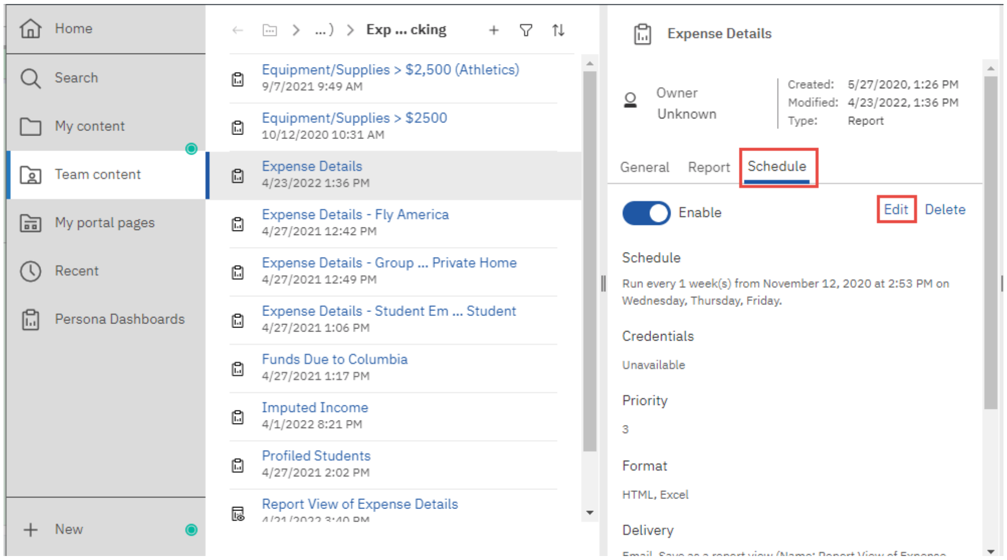
Scheduling a Report

You can specify the run time and delivery options for your report, including emailing it to yourself or colleagues.

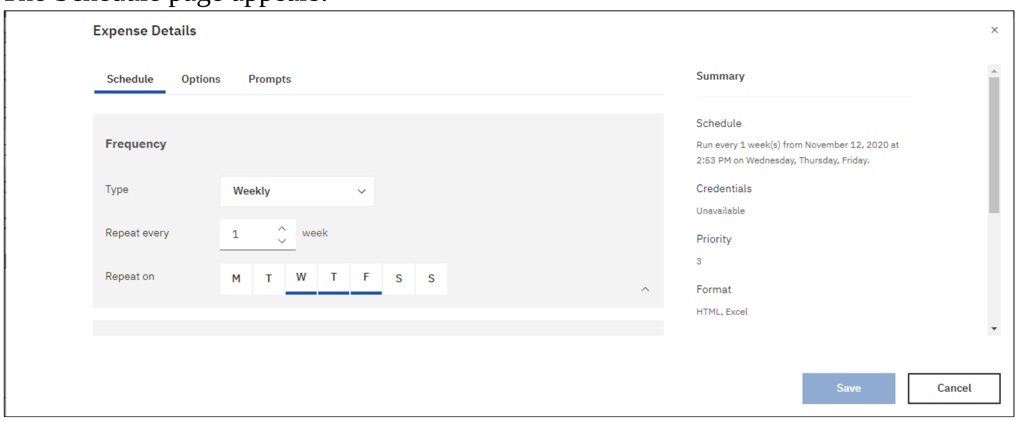
1. Navigate to the report you want to run.
2. In the **More** ••• icon the report you want to run, click the **Properties**.



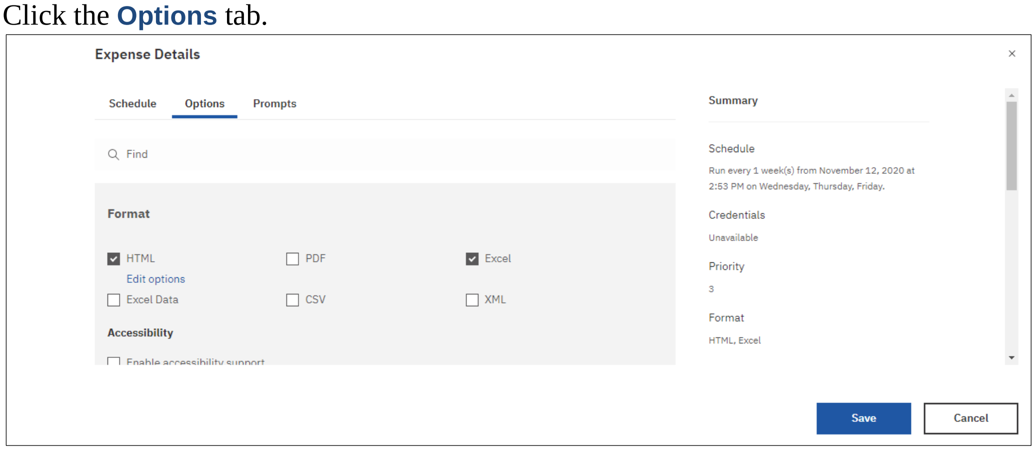
3. Click the **Schedule** tab and click the **Edit** link.



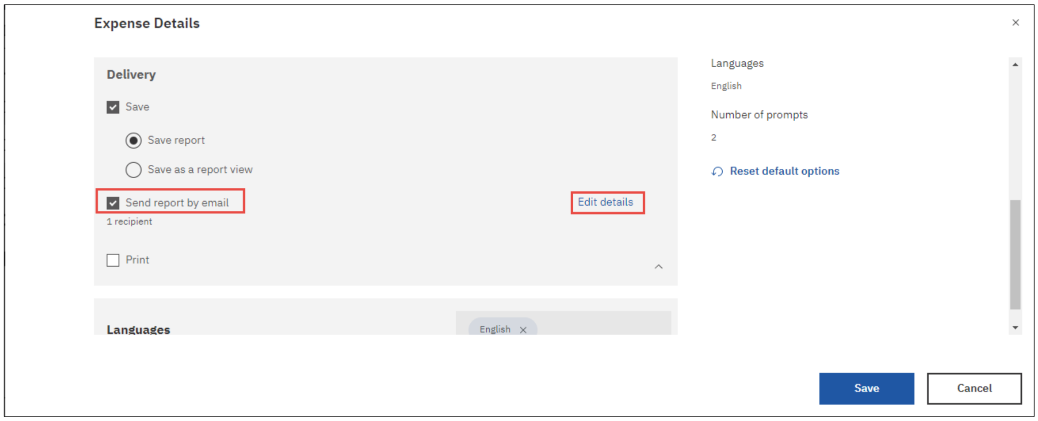
The Schedule page appears.



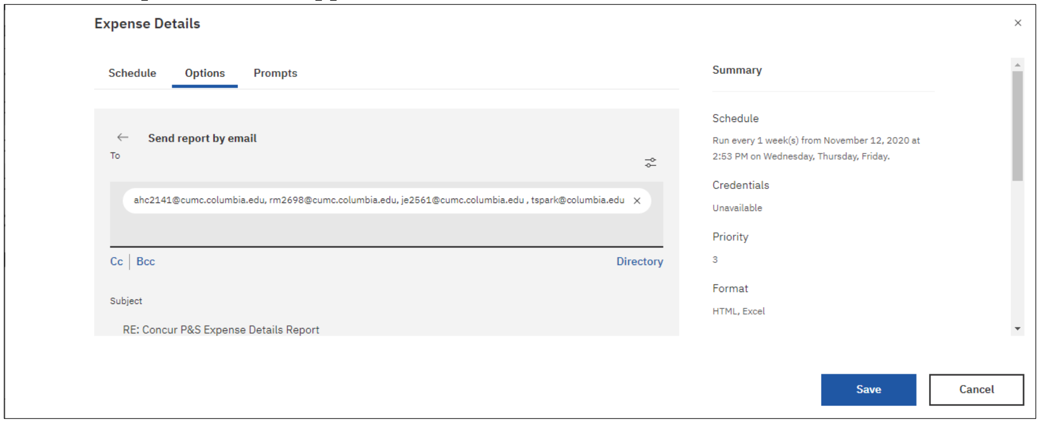
3. Define the schedule for the report.
4. Click the **Options** tab.



5. Select the desired **Format**.
6. Scroll down to the **Delivery** section, click the **Send report by email** option and click the **Edit details** link.



The email options screen appears.



7. Enter email addresses in the **To**, **CC**, or **BCC** sections separated with semi-colons and compose the email **Subject** and **Message**.
6. Click **Save**.

Getting Help

Please contact the Finance Service Center
http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now
https://columbia.service-now.com