Job Aid: Running Concur Reports for Reporting Managers

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.

SAP Concur C powered	d by Cognos 11		Welcome 🗸			Resources		8
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My content								
g Team content	Recent					20 E		
My portal pages						_		
() Recent	Ē.	1	1	:				
Persona Dashboards	Expense Accrual		Employee Details					
	Report		Report					
	Last modified 5/27/2021, 6:18 PM		Last modified 5/7/2021, 12:21 AM					
+ New								

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.

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	Resources	;	oC
My preferences			
General Personal			
Home page		Reset to (default
Report format		HTML	~
Turn on accessibility features			
Show hints			
Options for your region			
Time zone			~
Product language			~
Content language			~
Bidirectional language support			
Base direction for text		Right-to-	left v

- 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.

Create	short	cut: Expense Tracking		×
Select	a desti	ination		
		My content	C7	
a	\$	Shortcut to Expense Tracking		
Destinat	tion: I	My content		
		Create shortcut	Cancel]

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.



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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.

Home	\leftarrow	🖂 > T r :> Expe racking + 🖓	? ↑↓	
Q Search	6	Equipment/Supplies > \$2,500 (Athletics) 9/7/2021 9:49 AM		*
My content		Equipment/Supplies > \$2500 10/12/2020 10:31 AM		
Team content		Expense Details 4/23/20		
My portal pages	Ē.	Expense Details - Fly America 4/27/2021 12:42 PM		
C Recent		Expense Details - Group Private Home 4/27/2021 12:49 PM		
Persona Dashboards	6	Expense Details - Student Em Student 4/27/2021 1:06 PM		

The Prompts screen appears.

		All Promp	ots Optional^
Select Sent to Arc Date Ra From: May 27, 2020 Imv Earliest date To: May 27, 2020 Imv Earliest date	ange	Select Rep	oort Purpose
Select Employee School	51	Select Empl Keywords: Type one or more keywords separated by spaces. Search Options & Results:	Remove
Select all Deselect all	Select all Deselect all	Select all Deselect all	Select all E
<	i		>

- 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 $\boxed{\hfill \ }$ icon for the report you want to run and click **Run as**.

Home	← ि > Pers…oar > Depa…rvic > Detai…ports + ♡	t↓
Q Search	Average Life Cycle Details 1/26/2018 6:22 PM	Rup as a
My content	Average Spend by Category Details 7/9/2019 8:29 PM	∠ Edit report
a Team content	Credit Card Adoption Details 7/9/2019 8:30 PM	😡 Create report view
My portal pages	Current Quarter Spend Details 7/9/2019 8:31 PM	🕄 View versions

The Run as screen appears.

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Run in background			Summary	
Prompt me				
You will be prompted for	or input before the report runs	i.	Format	
0.5.1			HTML	
Q, Find			Languages	
			undefined	
Format			Reset defaults	
	0.005			
Freel Data	O CSV	O XMI		
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Accessibility				
Enable accessibility sup	port		^	

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.

Run in b	ackground	
Now		
• Later	☐ 2022-04-23	() 7:55 PM

- 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**.

Home	$\leftarrow \text{im} \rangle \dots \end{pmatrix} \Rightarrow Exp \dots cking \qquad + \nabla \uparrow \downarrow$
Q Search	Equipment/Supplies > \$2,500 (Athletics) 9/7/2021 9:49 AM
My content	Equipment/Supplies > \$2500 10/12/2020 10:31 AM
Deam content	Expense Details
My portal pages	Expense Details - Fly America 4/27/2021 12:42 PM
C Recent	Expense Details - Group Private Home
Persona Dashboards	Expense Details - Student Em Student 🛱 View versions
	Funds Due to Columbia & Create a new job
	Imputed Income 4/1/2022 8:21 PM ↔ Create shortcut
	Profiled Students ₄/27/2021 2:02 PM Ū Delete
+ New 💿	Report View of Expense Details

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

Expense Details Created: 5/27/2020, 1:26 PM Modified: 4/23/2022, 1:36 PM Type: Report General Report Schedule Enable Edit Delete Schedule
Owner Created: 6/27/2020, 1:26 PM Unknown Modified: 4/23/2022, 1:36 PM Type: Report General Report Schedule Edit Delete
Unknown Type: Report General Report Schedule Enable Edit Delete Schedule
General Report Schedule Enable Edit Delete Schedule
Enable Edit Delete
Schedule
Run every 1 week(s) from November 12, 2020 at 2:53 PM on
Wednesday, Thursday, Friday. Credentials
Unavailable
Priority 3
Format
HTML, Excel
Email Courses a manteriou (Manuel Beneth) (our of European

Expense Details Schedule Options Prompts Summarv Schedule Frequency Run every 1 week(s) from November 12, 2020 at 2:53 PM on Wednesday, Thursday, Friday. Credentials Туре Weekly \sim Unavailable 1 🗘 week Repeat every Priority 3 Repeat on M T W T F S S Format HTML, Exce Cancel

3. Define the schedule for the report.

4. Click the **Options** tab.

Schedule Options	Prompts		Summary
Q Find			Schedule Run every 1 week(s) from November 12, 2020 at 2:53 PM on Wednesday, Thursday, Friday.
Format			Credentials Unavailable
HTML Edit options	PDF	✔ Excel	Priority
Excel Data	CSV	XML	3
Accessibility			HTML, Excel
Fnahle accessibility su	oport		

- 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.

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Expense Details	
Delivery	Languages
Save	Number of prompts
Save report	2
O Save as a report view	Reset default options
Send report by email 1 recipient	Edit details
Print	~
Languages	English X
	Save
ail options screen appears.	Save
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ail options screen appears. Expense Details Schedule Options Prompts ← Send report by email To behold 141 Secure columbia edu. m2698 Secure columbia edu. in 2561	Summary Schedule Run every 1 week(s) from November 12, 2020 a 2:53 PM on Wednesday, Thursday, Friday, Credentials
A Send report by email To A Send report by email To A Send report by email To A Send report by email To	Summary Schedule Rus every 1 week(s) from November 12, 2020 a 2:53 PM on Wednesday, Thursday, Friday. Credentials Unevailable Disaits:
Ail options screen appears. Expense Details Schedule Options Prompts C Send report by email To Cel Bec	Surve Summary Schedule Run every 1 week(s) from November 12, 2020 a 2:53 PM on Wednesday, Thursday, Friday. @cumc.columbia.edu , tsperk@columbia.edu x (@cumc.columbia.edu , tsperk@columbia.edu x) Directory Joretory 3
il options screen appears. Expense Details Schedule Options Prompts Constraint Send report by email Constraint Send report Benefits Send report Send report Benefits Send report Benefits Send rep	Surve Surmary Schedule Run every 1 week(s) from November 12, 2020 a 2:55 PM Wednesday, Thursday, Friday, Credentials Unavailable Priority Directory 3 Format

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

Cancel

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 <u>https://columbia.service-now.com</u>