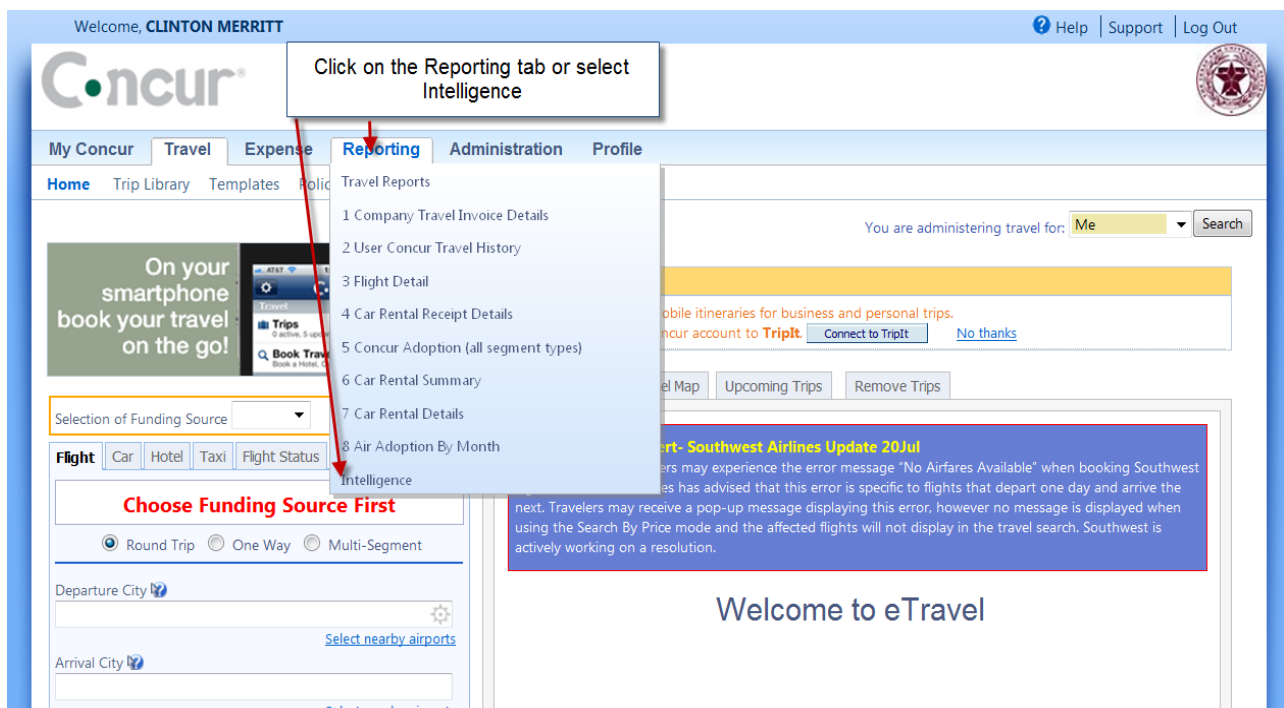# How to Run Concur Reports – System Members

All approvers in Concur can run reports. Those reports will contain information for all those employees who report to that approver. We are recommending Business Coordinators request their department head or Dean set them up as report delegates in their profile. This will provide the Business Coordinator, when delegating in as the department head/Dean the ability to view travel and expense information for the entire department/college/division. The individual who has received the Cognos Consumer role will have access to all data for that particular system member. For those of you that have multiple system member, then you will need to run reports out of the Texas A&M University System Member Reports folder. We have added system member prompts to many of the Standard Reports. However most of you will be able to follow the process below and run any of the Standard Reports as is and this will return results for your system member.

A new window will appear. Click on
Intelligence - Standard Reports

Launch

Public Folders My Folders Concur Dashboard

Public Folders

Entries: 1 – 4

	Name ◇	Modified ◇	Actions
☐ 📁	Concur Data Warehouse	July 12, 2012 1:29:37 PM	More...
☐ 📁	Dashboard Metrics	August 28, 2009 7:18:05 PM	More...
☐ 📁	Intelligence - Standard Reports	July 14, 2012 2:25:56 AM	More...
☐ 📁	Texas A&M University System (p00082048i4v)	June 28, 2012 1:53:28 PM	More...

Public Folders My Folders Concur Dashboard

Public Folders > **Intelligence - Standard Reports**

Entries: 1 – 19

	Name ◇	Modified ◇	Actions
☐ 📁	Accrual	March 10, 2010 1:18:20 PM	More...
☐ 📁	Administration	May 14, 2012 11:35:57 PM	More...
☐ 📁	Audit	April 30, 2009 6:58:05 PM	More...
☐ 📁	Carbon Footprint	July 14, 2009 1:19:55 AM	More...
☐ 📁	Company Billed Cards	May 24, 2012 6:34:10 PM	More...
☐ 📁	Compliance	April 27, 2010 4:39:52 PM	More...
☐ 📁	E-Receipt	July 6, 2010 6:25:47 PM	More...
☐ 📁	Expense Processing	September 24, 2009 2:06:11 PM	More...
☐ 📁	Finance	April 30, 2009 12:35:26 PM	More...
☐ 📁	Fraud	April 30, 2009 12:37:51 PM	More...
☐ 📁	Invoice	November 23, 2009 8:26:33 PM	More...
☐ 📁	Meetings	July 8, 2011 1:50:44 PM	More...
☐ 📁	Mobile Usage	May 16, 2012 4:47:19 PM	More...
☐ 📁	Previous Report Versions	July 19, 2010 3:52:45 PM	More...
☐ 📁	Spending	April 30, 2009 12:35:56 PM	More...
☐ 📁	Tax	April 10, 2011 11:40:17 PM	More...
☐ 📁	Travel Request	April 17, 2012 12:14:09 AM	More...
☐ 📁	Trips	January 14, 2010 3:39:34 PM	More...
☐ 📁	Vendor	April 30, 2010 3:49:33 PM	More...

Then click on the folder of interest to run
a report. In this example we will run the
Expense and Travel Overview report.
Select the Administration folder.

| | Public Folders | My Folders | Concur Dashboard | | | | |

Public Folders > Intelligence - Standard Reports > **Administration**

Entries: 1 - 14

		Name ◇	Modified ◇	Actions
☐	▶	Accounting Reconciliation Report	March 5, 2012 3:20:42 PM	More...
☐	▶	Bank Statement Reconciliation Report	July 18, 2012 2:39:25 PM	More...
☐	▶	Billed Transaction Reconciliation	July 19, 2012 6:52:29 AM	More...
☐	▶	Billed Transaction Reconciliation - Detail	July 19, 2012 11:29:26 AM	More...
☐	▶	Employee Bank Account Status	March 5, 2012 3:20:42 PM	More...
☐	▶	Employee Details	July 20, 2012 9:46:16 PM	More...
☐	▶	Employee Roles	July 20, 2012 11:05:27 AM	More...
☐	▶	Expense and Travel Overview	July 19, 2012 12:19:06 PM	More...
☐	▶	Expense Reports by Country	July 19, 2012 12:17:15 PM	More...
☐	▶	Invoice Billed Transaction Reconciliation	May 15, 2012 1:11:17 AM	More...
☐	▶	Invoice Billed Transaction Reconciliation - Detail	May 15, 2012 1:10:01 AM	More...
☐	▶	Travel Rule Class	March 5, 2012 3:20:42 PM	More...
☐	▶	TripIt Expense Authorizations by Employee	March 5, 2012 3:20:40 PM	More...
☐	▶	TripIt Travel Authorizations by Employee	July 16, 2012 12:51:21 PM	More...

To run a report select the run arrow, do not click on the report name.

Run with options - Expense and Travel Overview   Help ⊗

Select how you want to run and receive your report.

Format:

Delimited text (CSV) ▼

HTML
PDF
Excel 2007
Excel 2002
Delimited text (CSV)
XML

To specify a time to run the report, or for additional formats, languages, or delivery options, use **advanced options**.

Select the format of the report. Leave all other settings as defaulted. For certain reports like the Expense and Travel Overview that contains charts and graphs it is best to run in HTML or PDF. However most other reports it is better to run in excel as that will provide more sort and data analysis options.

English ▼

Delivery:

◉ View the report now
○ Print the report:
   Printer location:

   _____   **Select a printer...**

Prompt values:
No values saved
☑ Prompt for values

Then select run

| Run | Cancel |

Expense and Travel Overview

Prompts

Range Type:	⦿ Year to Date ○ Month Range

Select the appropriate prompts. In many cases these reports will ask for a date range, some will ask for optional information like employee name. Some prompts are required and some are optional. If optional, it is not required anything be selected for that particular prompt.

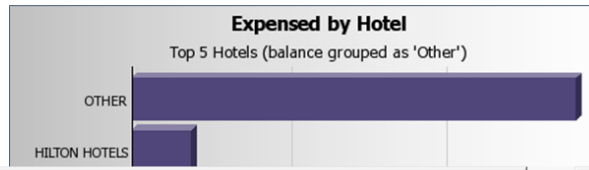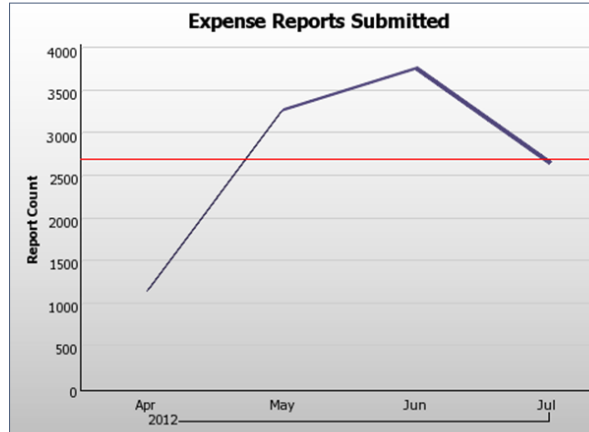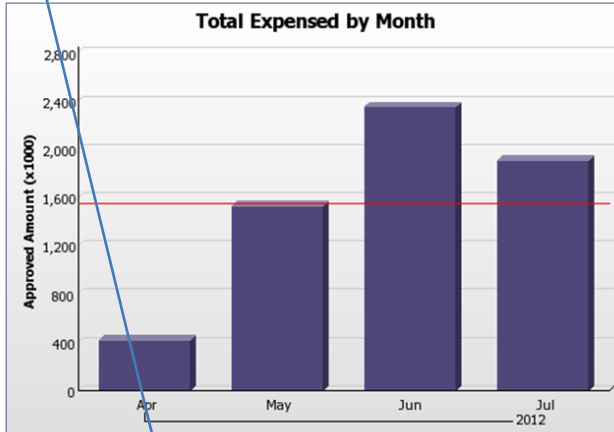Once the prompts are selected, then click Finish.

| Cancel | < Back | Next > | Finish | |

p00082048i4v_501005527@TAMUS.EDU_3815   **Log Off**   About

Keep this version ▼ | ▶ | 🗐 🗐 📷 ▼ | 🔘 ▼ | Add this report ▼ |

Here is the Expense and Travel Overview Report. Note to see additional pages scroll down the page and select the "Page Down" link (if in HTML).

Expense and Travel Overview
Year to Date
Reporting Currency: USD
Note: Red lines indicate the overall average

Expense

Total Expensed by Month

Approved Amount (x1000)
2,800
2,400
2,000
1,600
1,200
800
400
0
Apr   May   Jun   Jul
2012

Expense Reports Submitted

Report Count
4000
3500
3000
2500
2000
1500
1000
500
0
Apr   May   Jun   Jul
2012

Expensed by Airline
Top 5 Airlines (balance grouped as 'Other')

UNITED AIRLINES
OTHER

Expensed by Hotel
Top 5 Hotels (balance grouped as 'Other')

OTHER
HILTON HOTELS

Jul 22, 2012

◀ |

⊼ Top ⌂ Page up ▼ Page down ⊻ Bottom

◀ |

If you have any questions about running reports or what data the reports will return, please call 979-845-8772 or email c-merritt@tamu.edu