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

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

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.
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.
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