Scheduling Reports in Concur

Note: For most users it will be required that the report is copied to "My Folders" before it can be scheduled. To do that the user can select the report and then select the "copy" icon. Then select my folder and click the "paste" icon.

Select the icon shown below or go to the more link and select "new schedule"

Determine the frequency the report should be run and what time.

Then select the format, and select "send a link to the report by email" and then Select "Edit the Options". Once that is done enter in the email address and any message to send in the body of the email. Then select "Attach the Report". This will allow the user to receive an email with the report attached.