

## How to Run Concur Reports

All approvers in Concur can run reports. Those reports will contain information for all those employees who report to that particular 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 Dean/Department Head will need to login to Concur and go to their profile. Under “Expense Delegates” the will need to “Add” a new delegate if you are not already a delegate for the Dean/Department Head. Then select the “Can Use Reporting” box and then click save.

| Expense Delegates   |   |                                     |                                     |                                     |                                     |                                     |                          |                      |                      |
|---|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|----------------------|----------------------|
| Add Save Delete   |   |                                     |                                     |                                     |                                     |                                     |                          |                      |                      |
| Delegates are employees who are allowed to perform work on behalf of other employees. |   |                                     |                                     |                                     |                                     |                                     |                          |                      |                      |
| <input type="checkbox"/>  | Name  | Can Prepare                         | Can View Receipts                   | Can Use Reporting                   | Receives Emails                     | Can Approve                         | Can Approve Temporary    | Receive              |                      |
| <input type="checkbox"/>  | <b>METCALF, KYLE</b><br>kmetcalf@tamu.edu   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| <input type="checkbox"/>  | <b>WILSON, BEVERLY</b><br>bawilson@tamu.edu | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |

Welcome, CLINTON MERRITT Help | Support | Log Out

**Concur**

Click on the Reporting tab or select Intelligence

My Concur | Travel | Expense | **Reporting** | Administration | Profile

Home | Trip Library | Templates | Policies

Travel Reports

- 1 Company Travel Invoice Details
- 2 User Concur Travel History
- 3 Flight Detail
- 4 Car Rental Receipt Details
- 5 Concur Adoption (all segment types)
- 6 Car Rental Summary
- 7 Car Rental Details
- 8 Air Adoption By Month

Intelligence

You are administering travel for: Me  Search

mobile itineraries for business and personal trips.  
Concur account to [TripIt](#) [Connect to TripIt](#) [No thanks](#)

Travel Map | Upcoming Trips | Remove Trips

**Alert - Southwest Airlines Update 20Jul**  
Travelers may experience the error message "No Airfares Available" when booking Southwest. Southwest has advised that this error is specific to flights that depart one day and arrive the next. Travelers may receive a pop-up message displaying this error, however no message is displayed when using the Search By Price mode and the affected flights will not display in the travel search. Southwest is actively working on a resolution.

Choose Funding Source First

Round Trip  One Way  Multi-Segment

Departure City  [Select nearby airports](#)

Arrival City  [Select nearby airports](#)

Welcome to eTravel

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

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 > Intelligence - Standard Reports > Administration

Public Folders > Intelligence - Standard Reports > Administration

Entries: 1 - 14

To return to the Standard Reports click here.

| 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... |
| Tript Expense Authorizations by Employee           | March 5, 2012 3:20:40 PM  | More... |
| Tript 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

Select how you want to run and receive your report.

Format:

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

English

Delivery:

View the report now

Print the report:

Printer location:  Select a printer...

Prompt values:

No values saved

Prompt for values

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.

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 >

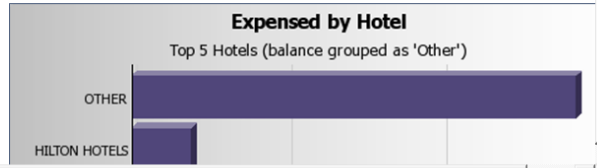
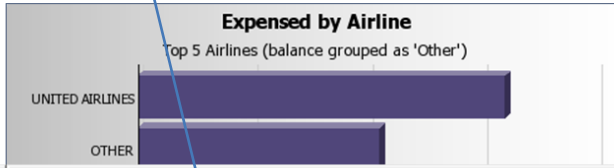
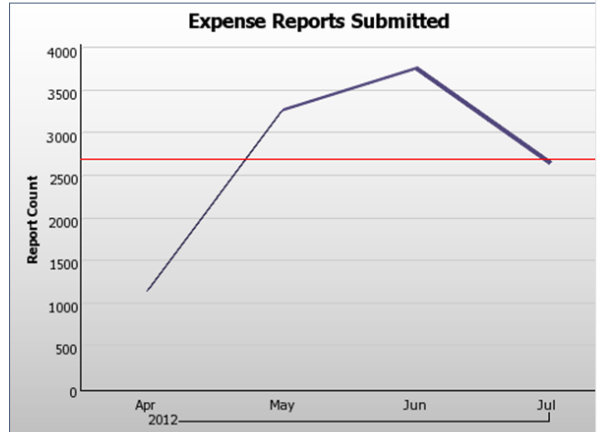
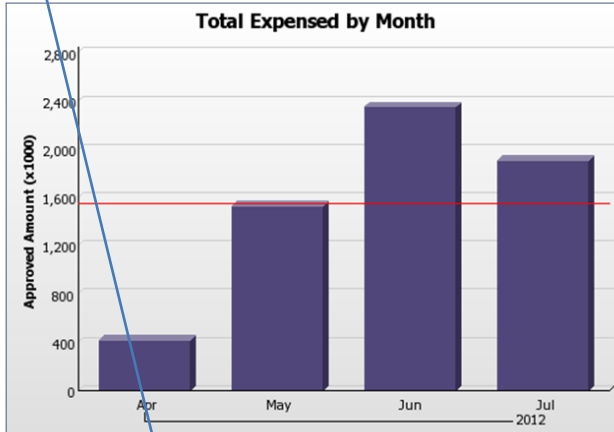
Finish

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



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 [travel@tamu.edu](mailto:travel@tamu.edu)