

## 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”

The screenshot shows a Windows Explorer window with the following details:

- Address bar: Public Folders > Taubman Company LLC (p0003760e34j) > Concur Support
- Table of reports:

Name	Modified	Actions
Airfare Details by OpComm Member - Concur	April 8, 2011 6:23:48 AM	[Icons] More...
Airfare Details with EE Custom1 - Concur Support	April 8, 2011 6:48:51 AM	[Icons] More...
Airline Ancillary Fees Summary June	July 20, 2010 10:55:45 AM	[Icons] More...
Ancillary Airline Fees Per Ticket	July 20, 2010 11:06:02 AM	[Icons] More...

The second screenshot shows the 'Actions' menu for the first report:

- Modified: April 8, 2011 6:23:48 AM
- Actions: [Icons] More...
- More... menu: [Icons] Schedule - Airfare Details by OpComm Member - Concur

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

Frequency:  
Select the frequency by clicking on a link.

**By Day** | By Week | By Month | By Year | By Trigger

Every 1 week(s) on:

Monday  Tuesday  Wednesday  Thursday  
 Friday  Saturday  Sunday

Options

Override the default values

Formats:

HTML

Number of rows per Web page:  
20

Enable selection-based interactivity

PDF  
No options saved  
Set...

Excel 2007  
 Excel 2002  
 Excel 2000 Single Sheet  
 Delimited text (CSV)  
 XML

Languages:  
English [Select the languages...](#)

Prompt values

Override the default values  
No values saved

2 : 41 PM

End:  
 No end date  
 End by:  
Feb 17, 2012  
2 : 41 PM

Delivery:  
Select at least one delivery method. For burst reports, the email recipients are

Save:

Save the report  
 Save the report as a report view [Edit the options...](#)  
...> Report View of Airfare Details by OpComm Member - Concur

Send a link to the report by email [Edit the options...](#)  
0 recipients

OK Cancel

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.

**Options**

Override the default values

**Formats:**

HTML

**Number of rows per Web page:**

20

Enable selection-based interactivity

PDF

No options saved

[Set...](#)

Excel 2007

Excel 2002

**Delivery:**

Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.

Save:

Save the report

Save the report as a report view [Edit the options...](#)

Send a link to the report by email [Edit the options...](#)

0 recipients

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include attachment.

**To:**

jim@company.com

**Subject:**

Report: Airfare Details by OpComm Member - Concur

**Body:** Change to plain text >> **B** *I* U [List Icons]

text

Attach the report