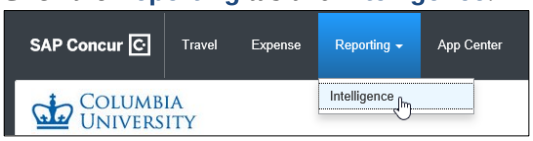
The **Concur Reporting** module allows you to run Columbia specific and Concur standard reports containing travel and expense data for your relevant department.

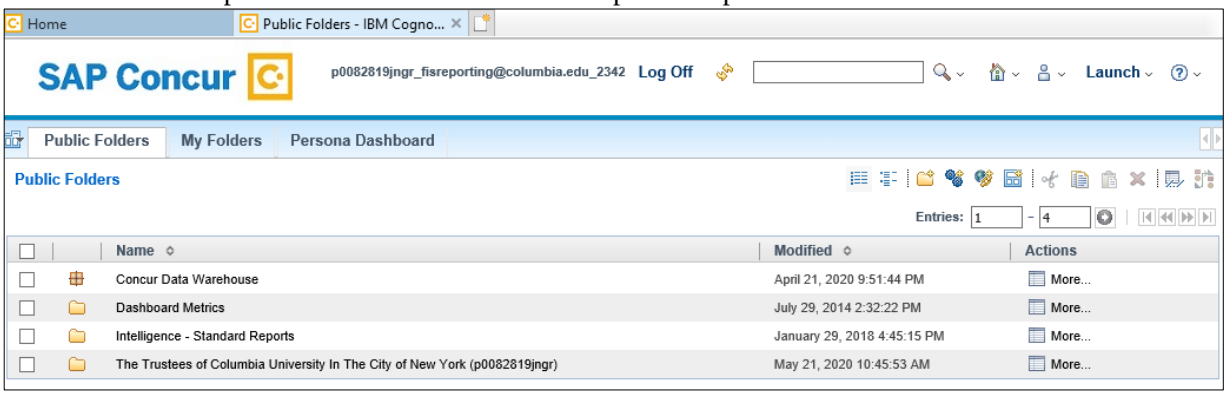
You must use* Internet Explorer *to run reports in the Concur Reporting module. Mac users must emulate Internet Explorer in Safari. Refer to* https://www.imore.com/how-view-websites-your-mac-require-internet-explorer-or-pc *for instructions.

Accessing the Concur Reporting Module

1. Using **Internet Explorer**, log into **Concur**.
2. Click the **Reporting** tab and **Intelligence**.

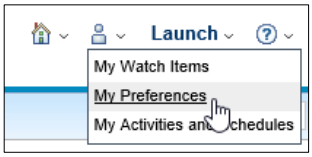


The Reporting Module appears in a new window in your browser. You will initially be viewing Public Folders for Concur standard reports and a folder for Columbia specific reports.

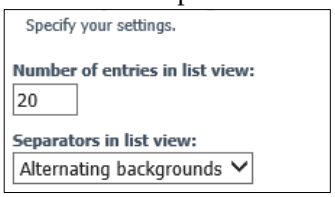


Setting Preferences

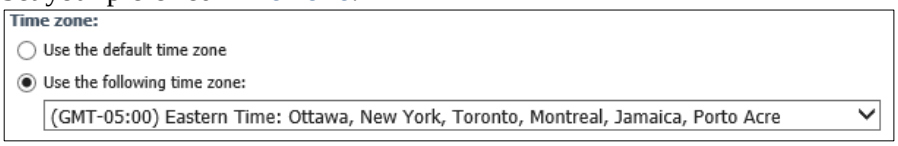
1. From the upper right corner of the Reporting Module screen, click the **My Area Options** icon and **My Preferences**.



2. To make the reports lists easier to navigate, enter your **Number of entries in list view**.



3. Set the **Separators in list view** to **Alternating backgrounds**.
4. Set your preferred **Time zone**.

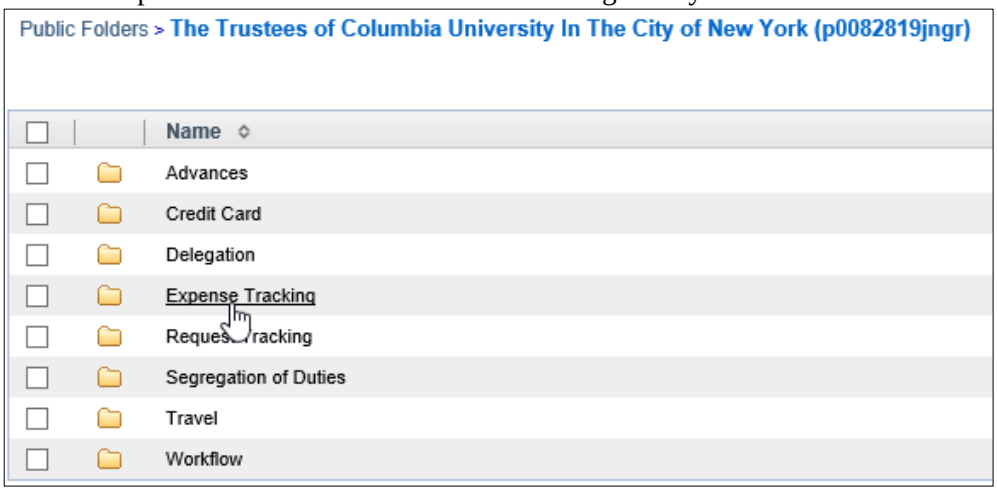


5. Specify any other settings and click **OK**.

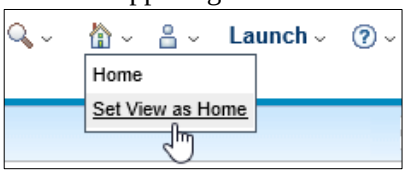
Setting a Home View

You can navigate to a folder containing reports that you most frequently run and set it as your Home View. The Reporting Module will then open to your selected folder at launch.

1. Click the report folder's **Name** from the list to navigate to your desired Home View.

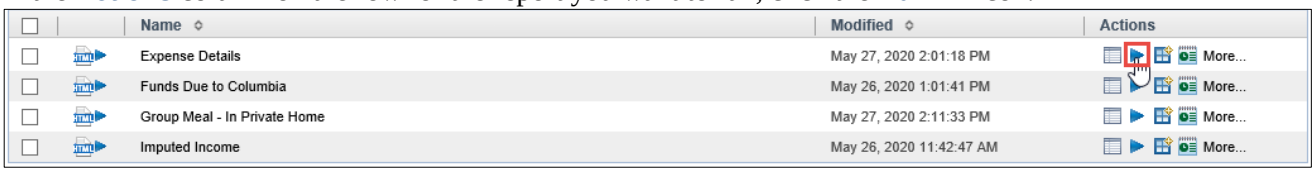


2. From the upper right corner of the Reporting Module screen, click the **Home** icon and **Set View as Home**.

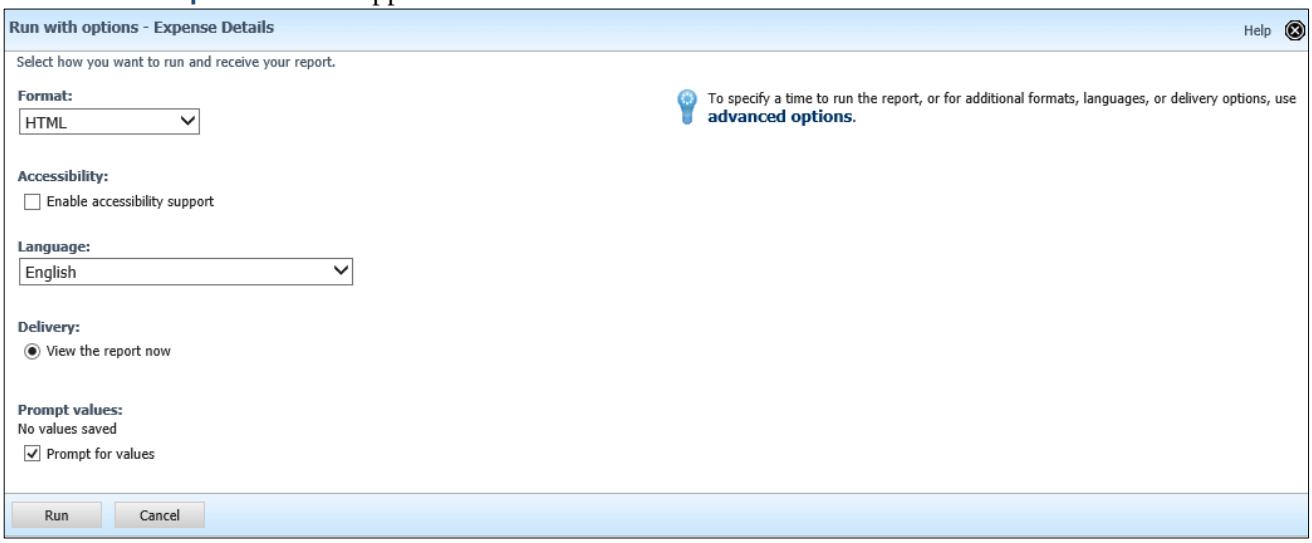


Running Reports

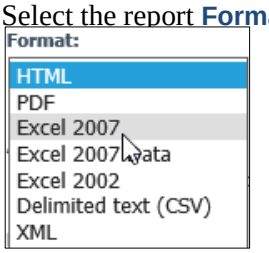
1. Navigate to the folder containing the report you want to run.
2. In the **Actions** column on the row for the report you want to run, click the **Run** icon.



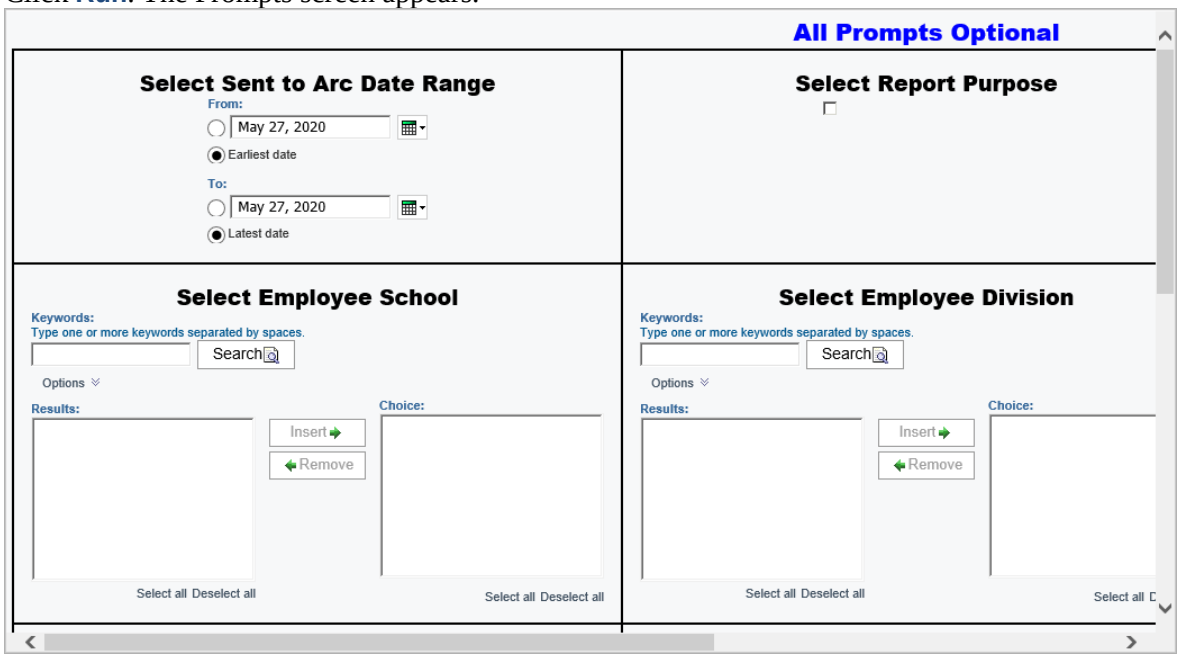
The **Run with options** screen appears.



3. Select the report **Format**. Select only HTML, Excel 2007, or Excel 2002.



4. Click **Run**. The Prompts screen appears.

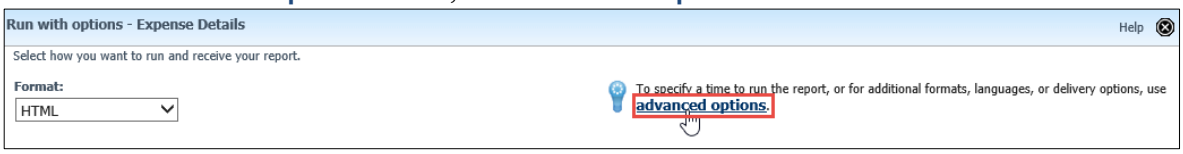


5. Enter the required or desired optional **Prompts.**
6. Click **Finish** at the bottom of the screen. The report may take some time to render depending on the amount of data.

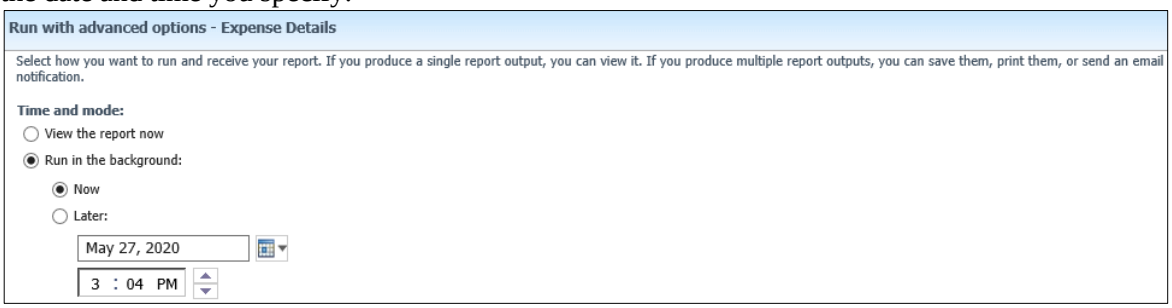
Running the Report with Advanced Options

Utilizing the **Advanced Options** feature allows you to run your report in the background so you can proceed with other tasks. You can specify the run time and delivery options for your report, including emailing it to yourself or colleagues.

1. When in the **Run with options** screen, click **advanced options**.

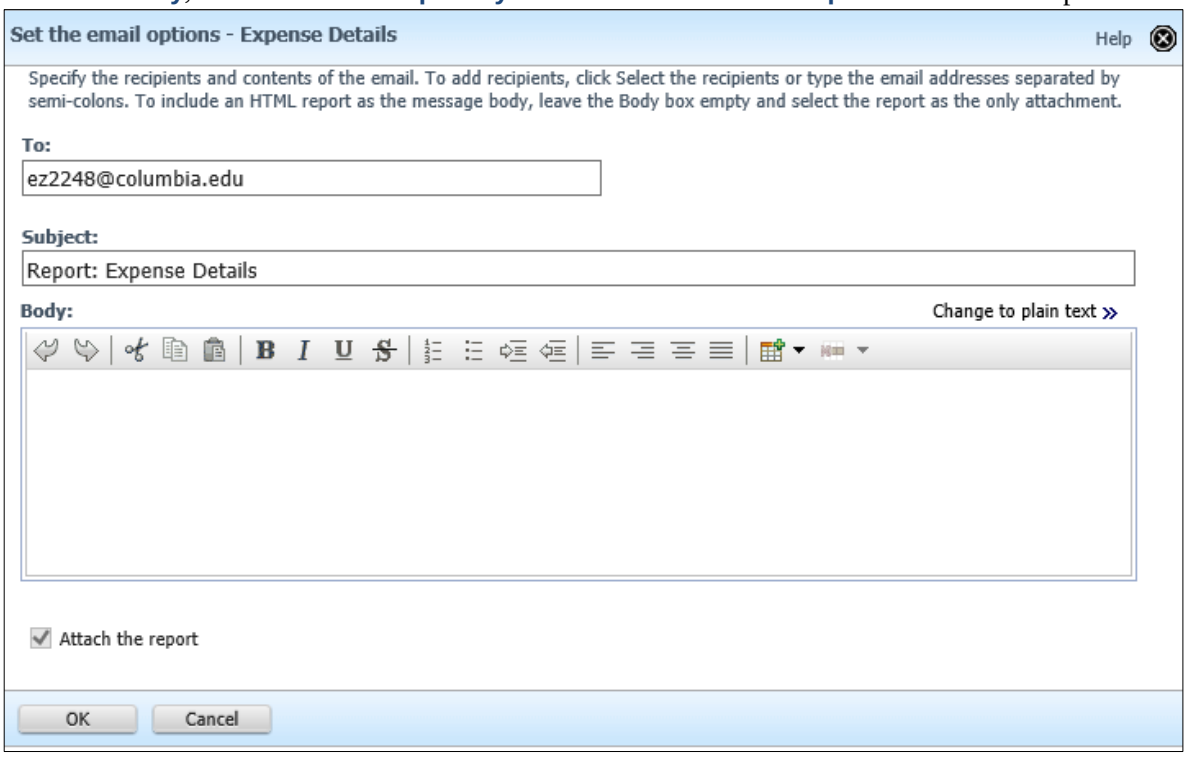


2. In the **Time and mode** section, select **Run in the background**. You can select to the run the report **Now** or **Later** at the date and time you specify.



The Options section expands.

3. Select the desired report **Formats**. Select only HTML, Excel 2007, or Excel 2002.
4. Under **Delivery**, select **Send the report by email** and click **Edit the options**. The email options screen appears.



5. Enter email addresses separated with semi-colons, compose the email, and click **OK**. You will return to the Run with advanced options screen.
6. Click **Run**. The Prompts screen appears
7. Enter the required or desired optional **Prompts** and click **Finish**.

Getting Help

Please contact the Finance Service Center
http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now
https://columbia.service-now.com