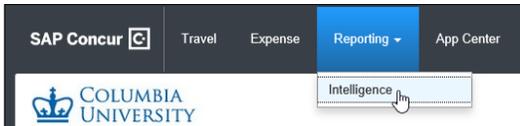


The **Concur Reporting** module allows you to run Columbia specific and Concur standard reports containing travel and expense data for your relevant department.

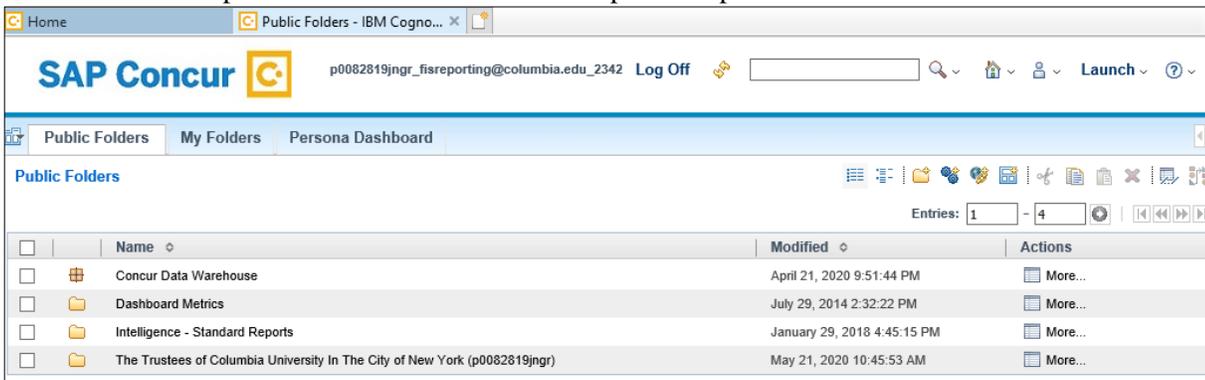
You must use Internet Explorer to run reports in the Concur Reporting module. Mac users must emulate Internet Explorer in Safari. Refer to <https://www.imore.com/how-view-websites-your-mac-require-internet-explorer-or-pc> for instructions.

Accessing the Concur Reporting Module

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

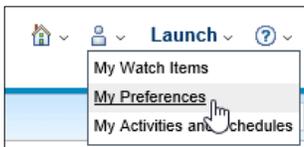


The Reporting Module appears in a new window in your browser. You will initially be viewing Public Folders for Concur standard reports and a folder for Columbia specific reports.



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**.

Specify your settings.

Number of entries in list view:

Separators in list view:

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

Time zone:

Use the default time zone

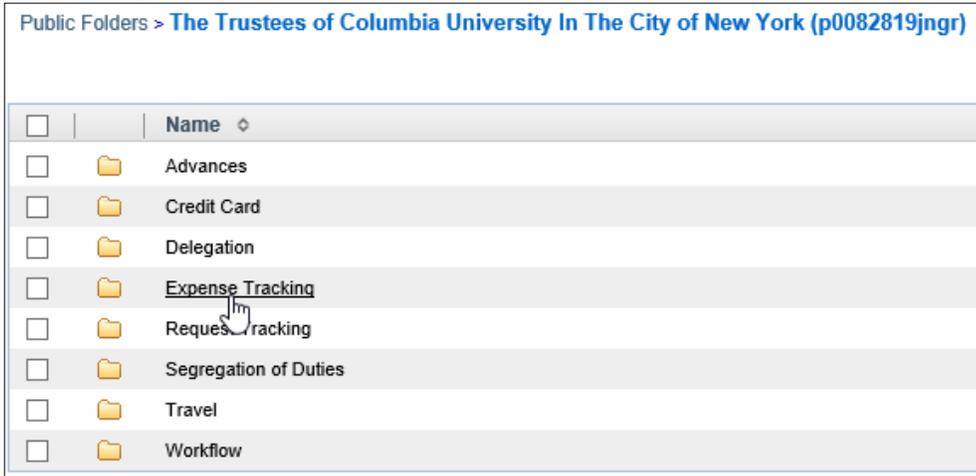
Use the following time zone:

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

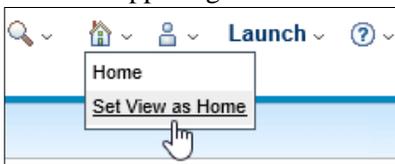
Setting a Home View

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.

	Name	Modified	Actions
<input type="checkbox"/>	 Expense Details	May 27, 2020 2:01:18 PM	    More...
<input type="checkbox"/>	 Funds Due to Columbia	May 26, 2020 1:01:41 PM	    More...
<input type="checkbox"/>	 Group Meal - In Private Home	May 27, 2020 2:11:33 PM	    More...
<input type="checkbox"/>	 Imputed Income	May 26, 2020 11:42:47 AM	    More...

The **Run with options** screen appears.

Run with options - Expense Details Help 

Select how you want to run and receive your report.

Format:

Accessibility:
 Enable accessibility support

Language:

Delivery:
 View the report now

Prompt values:
 No values saved
 Prompt for values

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

Format:

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

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

All Prompts Optional

Select Sent to Arc Date Range

From:

Earliest date

To:

Latest date

Select Report Purpose

Select Employee School

Keywords: Type one or more keywords separated by spaces.

Options ▾

Results:

Select all Deselect all

Select Employee Division

Keywords: Type one or more keywords separated by spaces.

Options ▾

Results:

Select all Deselect all

- Enter the required or desired optional **Prompts**.
- 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.

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

Run with options - Expense Details Help

Select how you want to run and receive your report.

Format:

To specify a time to run the report, or for additional formats, languages, or delivery options, use **advanced options**.

- 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.

Run with advanced options - Expense Details

Select how you want to run and receive your report. If you produce a single report output, you can view it. If you produce multiple report outputs, you can save them, print them, or send an email notification.

Time and mode:

View the report now

Run in the background:

Now

Later:

The Options section expands.

Options

Formats:

HTML

Number of rows per Web page:
20

Enable selection-based interactivity

PDF
No options saved
Set...

Excel 2007

Excel 2007 Data

Excel 2002

Delimited text (CSV)

XML

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

Save the report as a report view **Edit the options...**
Report View of Expense Details

Send the report by email **Edit the options...**
0 recipients

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.

Set the email options - Expense Details Help

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 an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:
ez2248@columbia.edu

Subject:
Report: Expense Details

Body: Change to plain text >>

Attach the report

OK Cancel

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>