REPORTING MODULE

Appendix E

A basic guide for using the Concur Reporting module

Updated: 13 October 2020
Table of Contents

Introduction........................................................................................................................................... 2
Users.................................................................................................................................................. 2
Delegates ........................................................................................................................................ 2
Login................................................................................................................................................ 3
Public Folders ................................................................................................................................... 4
Run a Report ..................................................................................................................................... 6
Schedule a Report ............................................................................................................................. 9
Reporting Guide

This appendix provides introductory guidance and information on the basics of the Concur Reporting module. SAP Concur provides extensive guides and training sessions for users that intend to delve more deeply into reporting including editing existing reports. Visit the SAP Concur Reporting Training website for more information and materials.

Introduction

The University of Alaska (UA) uses the Reporting: Intelligence module to generate reports from information captured in all areas of the Concur platform. Intelligence includes general reports written for all Concur clients and reports written specifically for UA. Since the Concur platform is configured to fit UA needs, users may find some of the general reports less useful.

Intelligence is a robust reporting tool based on Cognos software. The Cognos software works best in Internet Explorer. Firefox and Chrome are known to cause errors with Cognos.

Users

UA has a limited number of reporting licenses available. Since these are shared systemwide, they are assigned to users judiciously and sparingly. Reporting licenses are primarily given to financial managers, campus travel finance offices, and other personnel that need regular direct access to travel finance information for an entire department or campus.

All BI Managers (e.g. Default Approvers) have access to the Concur Reporting module as well. However, information in their reports is limited to users that fall under their manager hierarchy. For example, a supervisor receives information on their employees as well as anyone those employees supervise.

Delegates

Reporting users can assign the “Can Use Reporting” permission to two delegates. Concur provides an error message if the user attempts to assign the permission to more than two delegates.

<table>
<thead>
<tr>
<th>Delegates</th>
<th>Delegate For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Save</td>
</tr>
</tbody>
</table>

Delegates are employees who are allowed to perform work on behalf of other employees.

<table>
<thead>
<tr>
<th>Name</th>
<th>Can Prepare</th>
<th>Can Submit Reports</th>
<th>Can View Receipts</th>
<th>Can Use Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test, Default Approver2</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td><a href="mailto:approver2@alaska.edu">approver2@alaska.edu</a></td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td></td>
</tr>
</tbody>
</table>

2
**Login**

1. Login to Concur on Internet Explorer – Firefox and Chrome may cause errors with Cognos
2. Select “Intelligence” or “BI Manager” from the Reporting module drop-down menu
   a. Intelligence is the only option if user is either a BI Manager or a reporting license holder
   b. If both options are available, “BI Manager” pre-filters the reports to only users that fall under that manager’s hierarchy
3. The SAP Concur Cognos connection opens in a new window
Public Folders

The main copies of all reports are housed in the Public Folders tab. Public Folders contains general reports for all Concur clients (“Intelligence – Standard Reports”) and reports written specifically for UA (“University of Alaska”). Any changes to these reports are reflected on all users’ Public Folders.

Users can run reports from Public Folders but should never set schedules or make changes to them. Instead, users should copy the report to their My Folders tab. Once in My Folders, users can make changes and set schedules as they see fit.

1. In the Public Folders tab, open the desired folder

   ![Public Folders Table]

<table>
<thead>
<tr>
<th>Name</th>
<th>Modified</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concur Data Warehouse</td>
<td>July 7, 2020 5:36:56 PM</td>
<td>More...</td>
</tr>
<tr>
<td>Dashboard Metrics</td>
<td>July 29, 2014 11:32:22 AM</td>
<td>More...</td>
</tr>
<tr>
<td>Intelligence - Standard Reports</td>
<td>January 29, 2018 1:45:15 PM</td>
<td>More...</td>
</tr>
<tr>
<td><strong>University of Alaska (p0058179qscp)</strong></td>
<td>February 10, 2020 5:34:30 PM</td>
<td>More...</td>
</tr>
</tbody>
</table>

2. Find the desired report
   a. The “Request Encumbrance” report is in the “Request/Travel” folder
   b. Reports in the “UAF Reports” folder were written by the UAF Processor

   ![Public Folders Table]

<table>
<thead>
<tr>
<th>Name</th>
<th>Modified</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Card</td>
<td>April 30, 2020 4:32:39 PM</td>
<td>More...</td>
</tr>
<tr>
<td>Delegates</td>
<td>January 23, 2019 9:10:39 AM</td>
<td>More...</td>
</tr>
<tr>
<td>Employee Details</td>
<td>October 16, 2018 9:47:18 AM</td>
<td>More...</td>
</tr>
<tr>
<td>Expense</td>
<td>July 31, 2019 4:36:40 PM</td>
<td>More...</td>
</tr>
<tr>
<td>Infrequent Traveler</td>
<td>October 16, 2018 9:55:47 AM</td>
<td>More...</td>
</tr>
<tr>
<td>Payroll</td>
<td>January 7, 2020 1:48:36 PM</td>
<td>More...</td>
</tr>
<tr>
<td>Request/Travel</td>
<td>May 11, 2020 2:30:07 PM</td>
<td>More...</td>
</tr>
<tr>
<td>Risk - Duty of Care</td>
<td>February 11, 2020 9:23:04 AM</td>
<td>More...</td>
</tr>
<tr>
<td>System Admin</td>
<td>February 15, 2019 8:59:56 AM</td>
<td>More...</td>
</tr>
<tr>
<td>UAF Reports</td>
<td>May 26, 2020 3:30:08 PM</td>
<td>More...</td>
</tr>
</tbody>
</table>
3. Select, copy, and paste the desired report(s) into the My Folders tab
   a. Provides easy access to frequently used reports
   b. Allows the user to set schedules and make changes to a report without affecting other users
   c. Refresh browser if report is not immediately available
Run a Report

Users can run reports with the default settings by clicking the report name. Users can set the specific format, delivery method, run time, and save preferences through “Run with Options.” Once run with a selected format, that becomes the default format assigned to the report.

Always set default options from a report in My Folders. Do not set default options on reports in Public Folders. Changes to reports in Public Folders are reflected on all users’ Public Folders reports.

1. Copy and paste the report into My Folders
2. In My Folders, select “Run with Options” from the Actions column of the report
3. Set the “Format” and “Delivery” method or open “Advanced Options”
a. Html, pdf, or Excel 2007 are the recommended formats  
b. “View the report now” uploads the report into the browser’s downloads  
c. “Save the report” saves it as an output version  
d. “Advanced Options” gives the user an option to run and save the report on a specific date and time
4. Click “Run”
   a. Depending on the information in the report, it may take several minutes
   b. If viewing the report now, this screen appears and provides the option to select a different delivery method

Your report is running.

Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
Cancel
Schedule a Report

Users can schedule reports to run at a recurring date and time. Users can set a scheduled report to save as an output version or send as an emailed document. Sending as an email is a fantastic option for users that need a specific report on a regular basis (weekly, monthly, etc.).

Always set schedules from a report in My Folders. Do not set schedules on reports in Public Folders. Set schedules on reports in Public Folders are reflected on all users’ Public Folders reports.

1. Copy and paste the report into My Folders
2. In My Folders, select “Schedule” from the Actions column of the report

3. Set the schedule for the report
4. The scheduled report runs with its default settings
   a. Select “Override the default values” under Options to make changes
   b. This is also where users can set an email schedule as the delivery method

5. Once done, click “OK” to set the schedule