



REPORTING MODULE

Appendix E

A basic guide for using the Concur Reporting module

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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 is a robust reporting tool based on Cognos software.

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.

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.

Run a Report

b. "Save" downloads the report to the user's device

c. "Later" gives the user an option to run and save the report on a specific date and time

4.

Schedule a Report

4. Set the schedule for the report
 - a. Choose the desired Frequency options
 - b. Set a start and end Period if needed

5. The scheduled report runs with its default settings
 - a. Select the Options tab to make any changes (e.g., setting Format to Excel)
 - b. This is also where users can set an email schedule as the delivery method; use “Edit details” to assign recipients

6.6.