

# Running Reports in Concur

Only individuals who have been assigned an Approver role or Delegates that have been granted permission to use reporting by Approvers will have the Reporting tab.

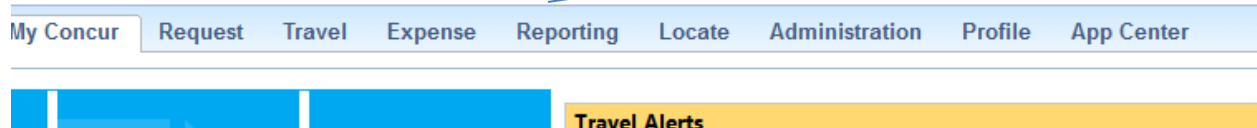
As a delegate by assigning permissions to a delegate, you are assigning permissions to:

Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The approver and delegate will only be able to see Reports that were approved by the Approver.

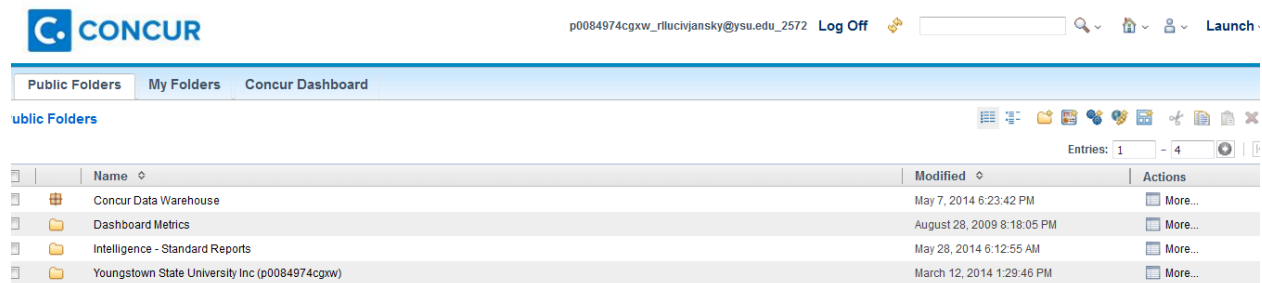
Logon to Concur

Click on Reporting – in the drop-down – Click on Intelligence



A screen similar to this opens up. You may see different things based on your permissions.

Click on



Click on the Youngstown State University folder to open it. (You may also have Intelligence – Standard Reports folder which contains canned Concur reports.)

A copy of the shared reports will appear. These are designed by YSU Travel Services.

	Name	Modified
<input type="checkbox"/>	Copy of Expense Summary by Employee and Year	June 10, 2014 11:08:29 AM
<input type="checkbox"/>	Expense Report with FOAP by Expense prompt	June 11, 2014 3:47:47 PM
<input type="checkbox"/>	Expense Reports by employee summary	June 11, 2014 4:28:40 PM
<input type="checkbox"/>	Request report by Approver 062514	June 26, 2014 9:57:33 AM

Click on the Report Name to run the Report.

A screen pops up with prompts. Each report has unique prompts and can have more than 1 set of prompts. Carefully read the description of the prompt in order to define the parameters of the report that you wish to see. These prompts, for instance, are asking for the Date Range of Expense Reports and the payment types. As data accumulates in the system, you may only want to see dates confined to a specific fiscal year and charges that were out of pocket.

## Prompts

**Date Range**

**Sent for Payment Date:**

**From:** Jun 26, 2014

**To:** Jun 26, 2014

**Options**

**Payment Types:**

- Cash Advance Return
- Company
- Employee
- JPMorgan MasterCard
- Out of Pocket
- Test
- Test User - JPMorgan Chase
- YSU Prepaid
- zNotUsed-Cash/Personal Card
- zNotUsed-Company Paid
- zNotUsed-IBCP

Select all Deselect all

If prompts exist, you will need to choose at least 1 option by clicking on it. If you hold the control key down – you can choose several options or you could choose Select All at the bottom of the screen to select all options.

Define all the Prompts.

Click Finish at the bottom of the screen when you are done (you may have to scroll down).

The Report screen appears with limited data.

Keep this version | Add this report

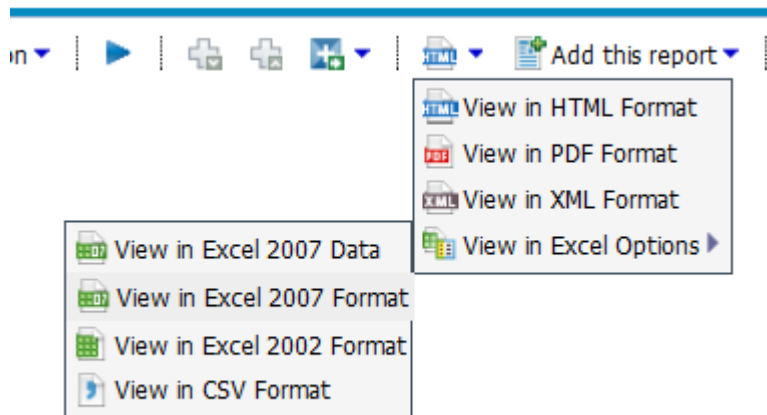
### Expense Summary by Expense Type and Year

Amounts in Reporting Currency

ude Parent Entries AND Sent for Payment Date: and no missing values

Expense Type	Expense Type	Year	Reporting Group	Approved Amount (rpt)
rel Expenses	Fixed Meals	2014	100100 Board of Trustees	196.00
			110600 General Counsel	71.00
			110602 Equal Opportunity & Policy Complian	71.00
			120201 Human Resources	553.75
			120301 YSU Police	1,745.00
			120603 Student Accts and Univ Receivables	241.50
			120708 Envir Occupational Health & Safety	89.00
			140100 Provost VP - Academic Affairs	639.00
			140702 Dean - CLASS	927.25
			140703 Biological Sciences	1,253.00
			140705 English	1,283.50
			140707 Foreign Languages & Literatures	140.00
			140709 Mathematics & Statistics	540.50
			140713 Geological & Environmental Sciences	34.50
			140714 Physics & Astronomy	1,072.50
			140715 Philosophy & Religious Studies	248.50
			140719 Psychology	1,530.00
			140723 Economics	752.50
			140725 Geography	273.25
			140726 History	444.00

Click on the HTML drop-down in the upper right-hand corner and select the format that you wish to review the report in.



The report will run in whichever format that you choose. Click to open the file. For instance, Excel 2007 format will look like this:

### Expense Summary by Expense Type and Year

Amounts in Reporting Currency				
Exclude Parent Entries AND Sent for Payment Date: and no missing values				
Parent Expense Type	Expense Type	Year	Reporting Group	Approved Amount (rpt)
Travel Expenses	Fixed Meals	2014	100100 Board of Trustees	196.00
			110600 General Counsel	71.00
			110602 Equal Opportunity & Policy Complian	71.00
			120201 Human Resources	553.75
			120301 YSU Police	1,745.00
			120603 Student Accts and Univ Receivables	241.50
			120708 Envir Occupational Health & Safety	89.00
			140100 Provost VP - Academic Affairs	639.00
			140702 Dean - CLASS	927.25
			140703 Biological Sciences	1,253.00
			140705 English	1,283.50
			140707 Foreign Languages & Literatures	140.00
			140709 Mathematics & Statistics	540.50

Excel 2007 data will populate a spreadsheet with no formatting.

When you are done, you can click the Log Off button at the top right-hand of the screen or the back arrow to return to the report folders.

