


Accessing Concur Reporting (New UI)

These instructions cover how to generate a Concur report for your department/organization.

Note: These reports are available for the manager based on their access.

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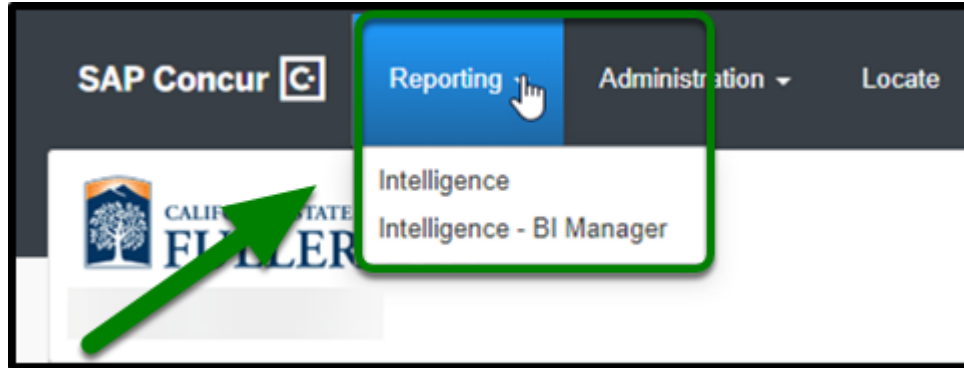

 If you need assistance with logging into Concur, please go to Logging into Concur.....0.

Generating a Report

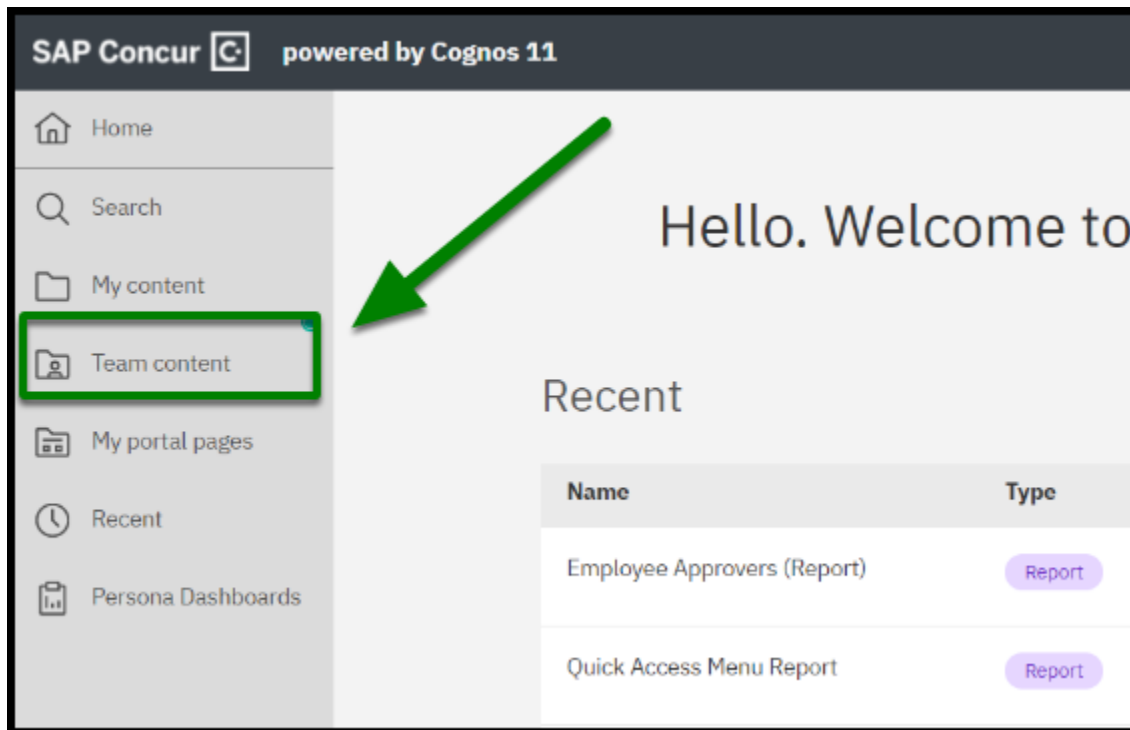
Step 1: From the Concur dashboard, click on **Reporting**.

Based on the type of access that you may have, select either:

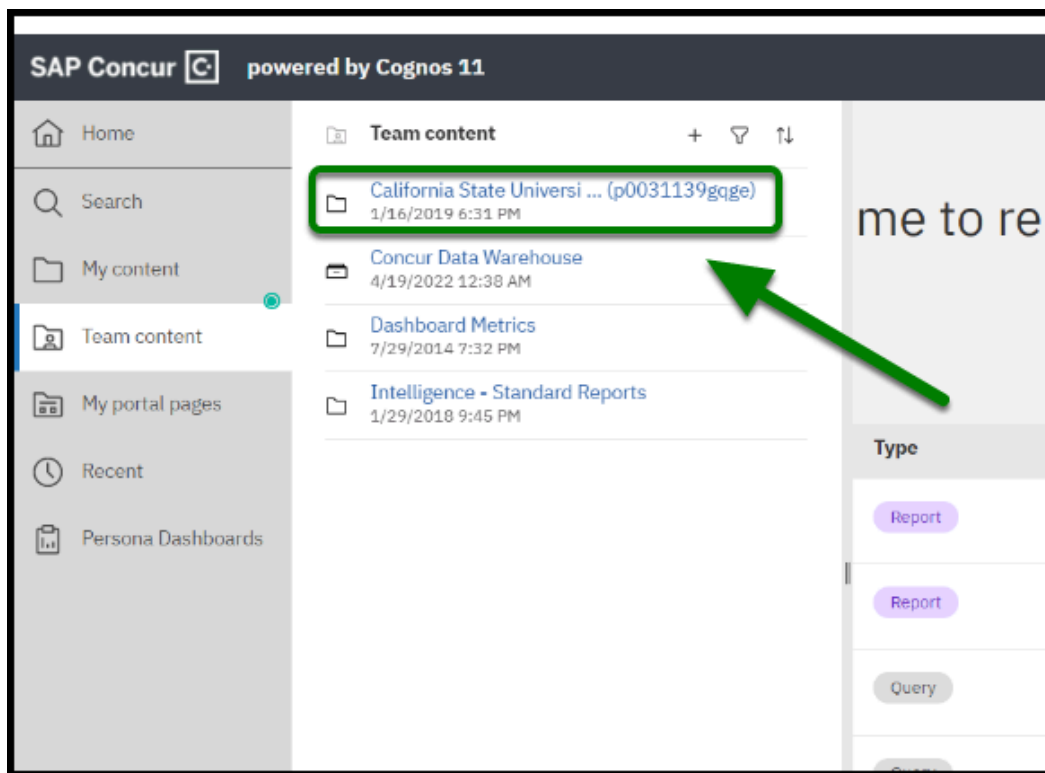
- **Intelligence**
- **Intelligence BI Manager**



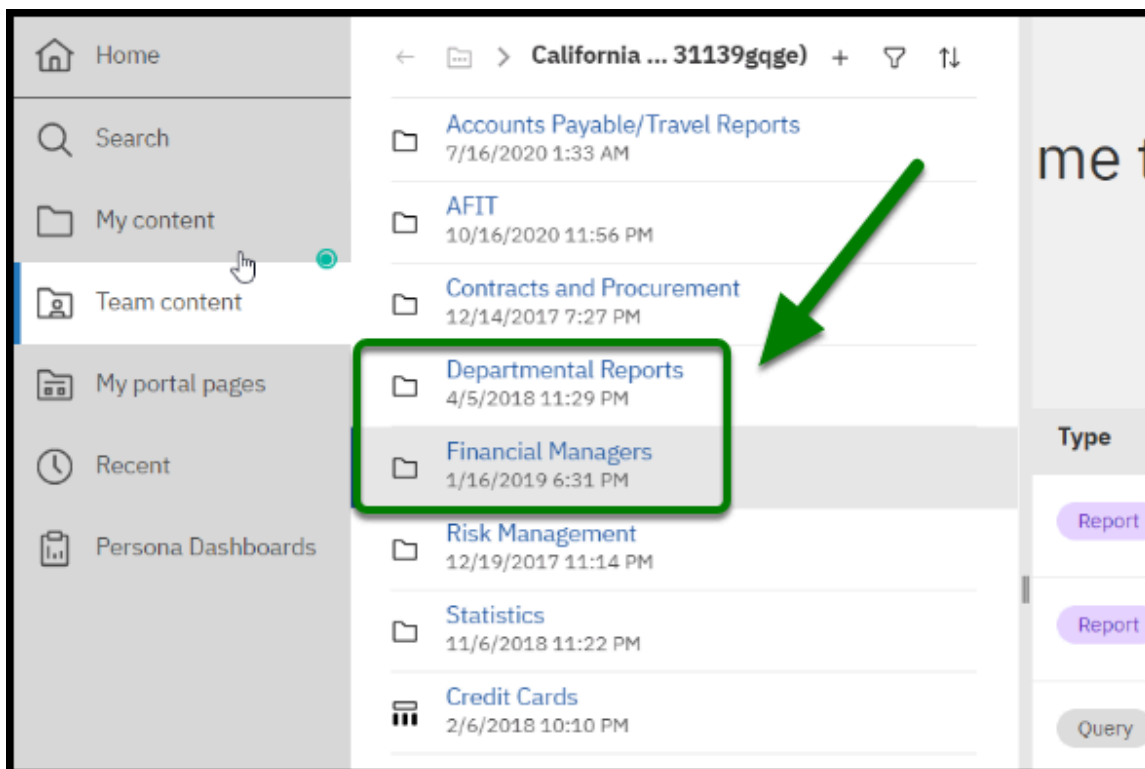
Step 2: Your screen will refresh, and you will be led to the following SAP Concur page. Click on **Team Content**.



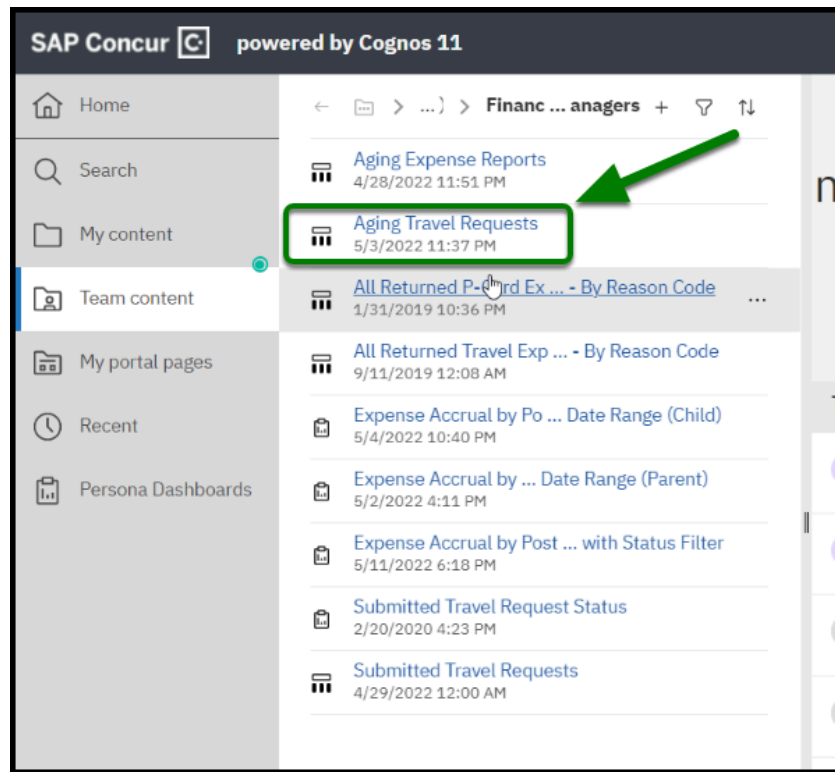
Step 3: From there, click on the **California State University (p0031139gqge)** folder.



Step 4: From there, click on the appropriate folder. For example the **Departmental Reports** or the **Financial Managers** link.



Step 5: There are different types of reports that you can run. For this example, we will select **Aging Travel Requests** available in the Financial Managers folder.



Step 6: Your screen will refresh, and you will be presented with the following calendar to select the appropriate date range that you would like to pull a report from.

For this example, we selected **March 1st to June 30th**. This means that only aging travel requests between a travel start date of March 1st and a travel end date of June 30th will show up in the report when it is generated.

Note: The hourly ranges are recommended to be left as **12:00 AM to 11: 59 PM**.

SAP Concur

Prompt

Provide values for the report you are about to run.

- Indicates a required field.
- Points to missing information.

End Date

Provide a value:

From:

2022

12 : 00 AM

Earliest date

To:

2022

11 : 59 PM

Latest date

Cancel < Back Next > Finish

Step 7: Click on the **Finish** button.

To:

2022

11 : 59 PM

Latest date

Cancel < Back Next > **Finish**

Step 7a: Your page will refresh, and your report will generate showing all Open Travel Requests from your selected date range.

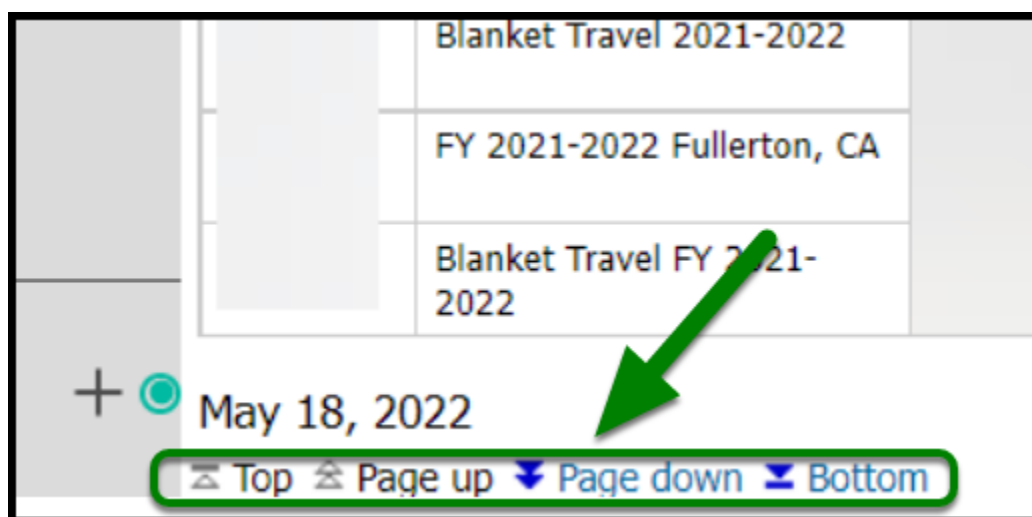
SAP Concur Aging Travel Requests

Open Travel Request

Request Policy: State Approve then Book, State Blanket Travel AND Approval Status: Approved, Pending on-line Booking AND Is Closed: N AND End Date: Between Mar 1, 2022 12:00 AM and Jun 30, 2022 11:59 PM
Start Date: Ascending order

Request ID	Travel Request Name	Requesting Employee	Employee ID	Approved Amount	Remaining Amount	Employee ID	Start Date	End Date	Employee Active Flag	Employee Org Unit 1 - Name	Employee Org Unit 2 - Name	Employee Org Unit 2 - Code
	Blanket Travel FY 2021-2022			625	625		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Athletics	10037
	Blanket Travel FY 2021-2022			301.25	301.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center	10044
	Blanket Travel FY 2021-2022			500.12	402.76		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Student Health and Counseling	10236
	Blanket Travel FY 2021-2022			251.25	251.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center	10044
	Blanket Travel FY 2021-2022			251.25	251.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center	10044
	Blanket Travel FY 2021-2022			251.25	251.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center	10044
	Blanket Travel FY 2021-2022			251.25	251.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center	10044
	Blanket Travel FY 2021-2022			251.25	251.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center	10044
	Blanket Travel FY 2021-2022			631.25	631.25		Jul 1, 2021	Jun 30, 2022	Y	VP University Advancement	VP University Advancement	10239
	Blanket Travel FY 2021-2022			775	775		Jul 1, 2021	Jun 30, 2022	Y	VP University Advancement	VP University Advancement	10239
	Blanket Travel FY 2021-2022			337.5	337.5		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	University Outreach	10234
	Blanket Travel FY 2021-2022			337.5	13.8		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	University Outreach	10234
	Blanket Travel FY 2021-2022			337.5	229.47		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Women's Center	10240
	Blanket Travel FY 2021-2022			1,020	768.63		Jul 1, 2021	Jun 30, 2022	Y	VP University Advancement	College & Program Development	10086
	Blanket Travel FY 2021-2022			925	872.82		Jul 1, 2021	Jun 30, 2022	Y	VP University Advancement	College & Program Development	10086
	Blanket Travel FY 2021-2022			337.5	337.5		Jul 1, 2021	Jun 30, 2022	N	VP of Student Affairs Office	University Outreach	10234
	Blanket Travel FY 21-22			1,200.47	893.48		Jul 1, 2021	Jun 30, 2022	Y	VP University Advancement	Govt and Community Relations	10381
	Blanket Travel FY 2021-2022			400.15	392.54		Jul 1, 2021	Jun 30, 2022	Y	VP University Advancement	College & Program Development	10086
	FY 2021-2022 Fullerton, CA			407.5	230.28		Jul 1, 2021	Jun 30, 2022	Y	VP Administration & Finance	Design & Construction	10392
	Blanket Travel FY 2021-2022			787.5	787.5		Jul 1, 2021	Jun 30, 2022	Y	VP University Advancement	Office of Alumni Engagement	10068

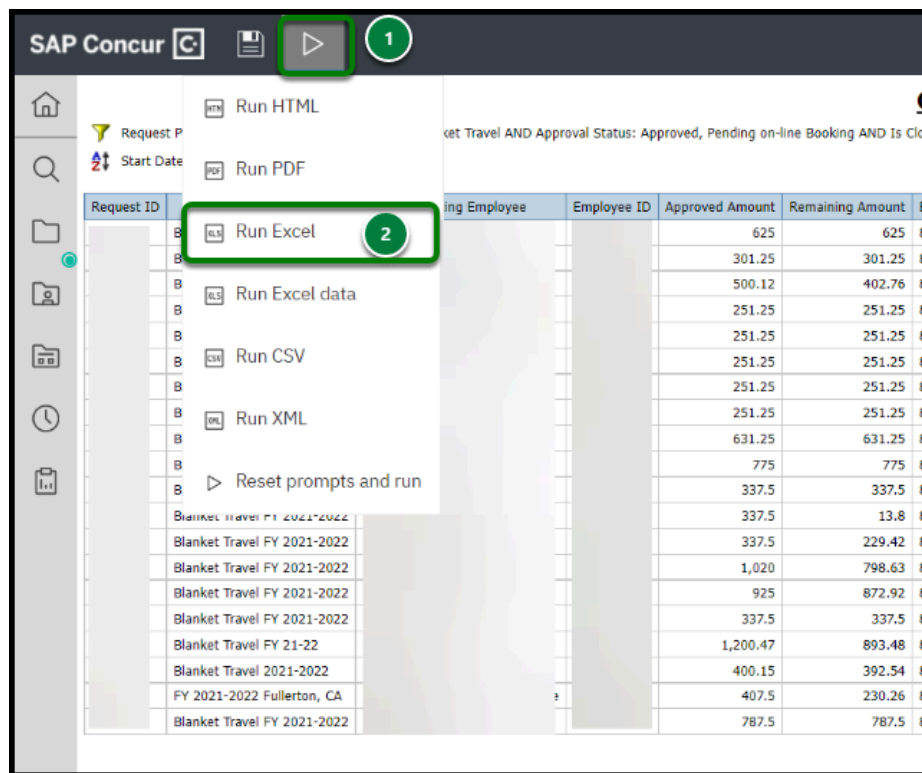
Step 7b: There may be several pages of data. You will have the option to click on **Top**, **Page up**, **Page down**, and **Bottom** to view them all.



Downloading a Report

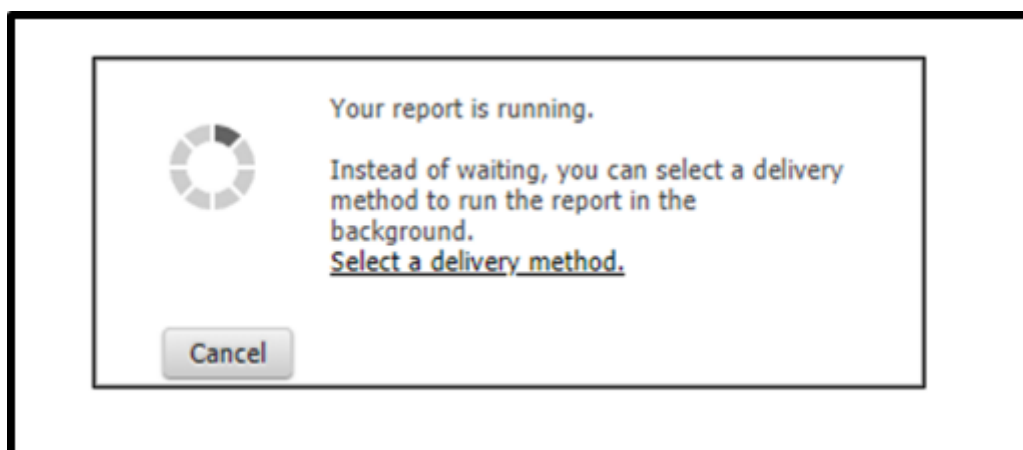
Step 8: To download the report, click on the following in order in the top-left of your screen:

1. Run (Play) Button
2. Click "Run Excel"

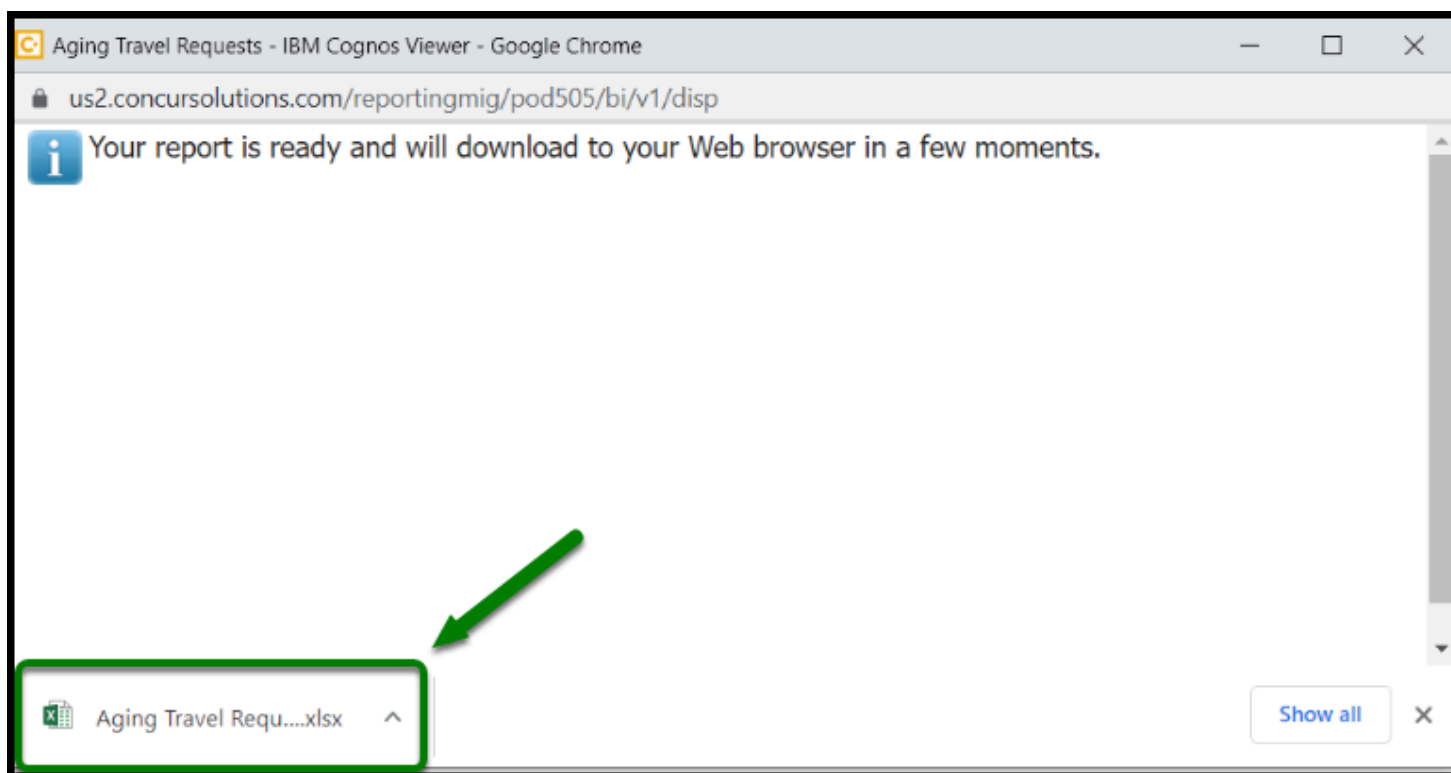


Step 9: Your page will refresh, and you will notice this loading screen. Please wait while your report is being generated.

Note: This may take a few minutes depending on the data.



Step 10: If you are using Google Chrome, your downloaded report should appear on the bottom. Click on **Aging Travel Request.xlsx**.



Step 11: Your report will open in Excel, and you will now be able to see how many open requests you have within your department.

Note: Each line item is a request.

Aging Travel Requests (1) - Excel

Miller, Jessica

File Home Insert Page Layout Formulas Data Review View Help Acrobat Tell me what you want to do

Clipboard Paste Copy Cut Format Painter Font Andale WT 14 Bold Italic Underline Color Text Background Color Merge & Center Alignment Number General Conditional Formatting Styles Normal Bold Good Neutral Calculation Check Cell Cells Insert Delete Format Clear Sort & Find & Filter - Select -

A1 X Open Travel Request

Open Travel Request

Request Policy: State Approve then Book, State Blanket Travel AND Approval Status: Approved, Pending on-line Booking AND Is Closed: N AND End Date: Between Mar 1, 2022 12:00 AM and Jun 30, 2022 11:59 PM

Start Date: Ascending order

Request ID	Travel Request Name	Requesting Employee	Employee ID	Approved Amount	Remaining Amount	Employee ID	Start Date	End Date	Employee Active Flag	Employee Org Unit 1 - Name	Employee Org Unit 2 - Name
Blanket Travel FY 2021-2022				625	625		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Athletics
Blanket Travel FY 2021-2022				361.25	361.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center
Blanket Travel FY 2021-2022				488.12	488.12		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Student Health and Counseling
Blanket Travel FY 2021-2022				261.25	261.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center
Blanket Travel FY 2021-2022				261.25	261.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center
Blanket Travel FY 2021-2022				261.25	261.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center
Blanket Travel FY 2021-2022				261.25	261.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center
Blanket Travel FY 2021-2022				261.25	261.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	Career Center
Blanket Travel FY 2021-2022				631.25	631.25		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	University Advancement
Blanket Travel FY 2021-2022				775	775		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	University Advancement
Blanket Travel FY 2021-2022				337.5	337.5		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	University Outreach
Blanket Travel FY 2021-2022				337.5	337.5		Jul 1, 2021	Jun 30, 2022	Y	VP of Student Affairs Office	University Outreach

[back to top](#)

Need more help?



Contact Concur Support at concur@fullerton.edu or at 657-278-3600.