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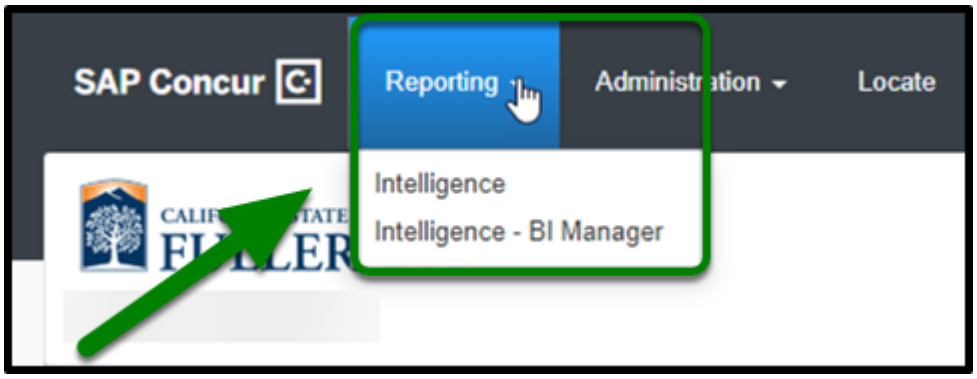
If you need assistance with logging into Concur, please go to Logging into Concur.....0.

Generating a Report

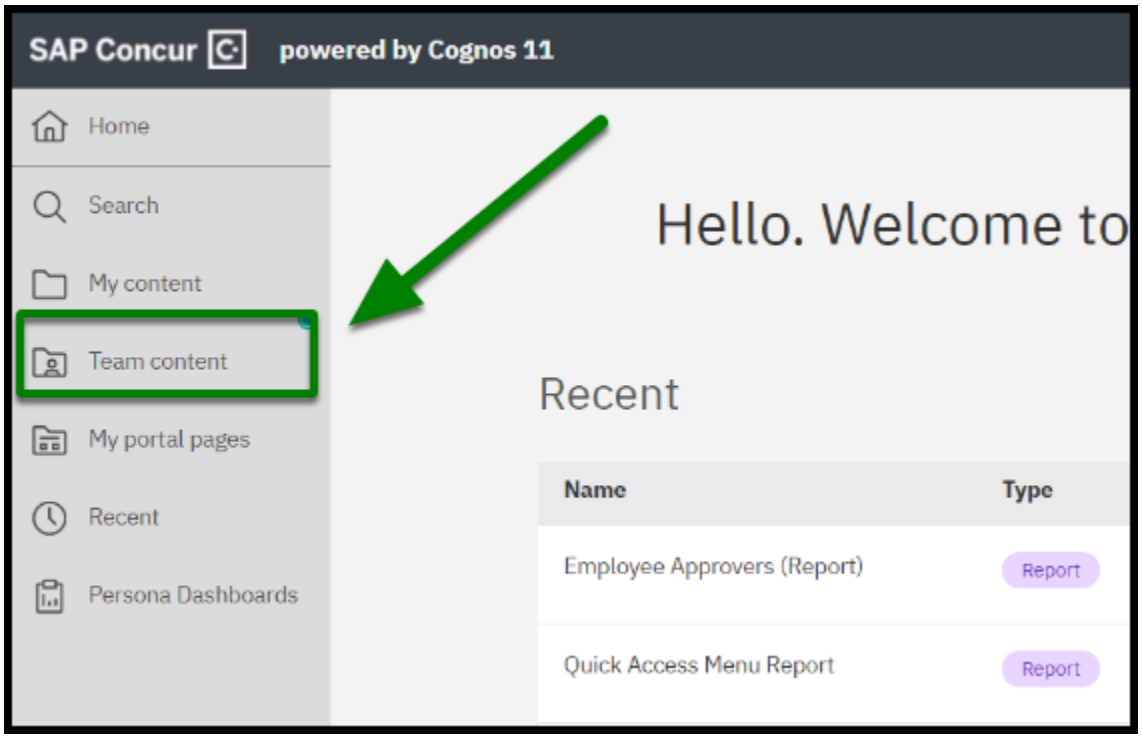
Step 1: From the Concur dashboard, click on **Reporting**.

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

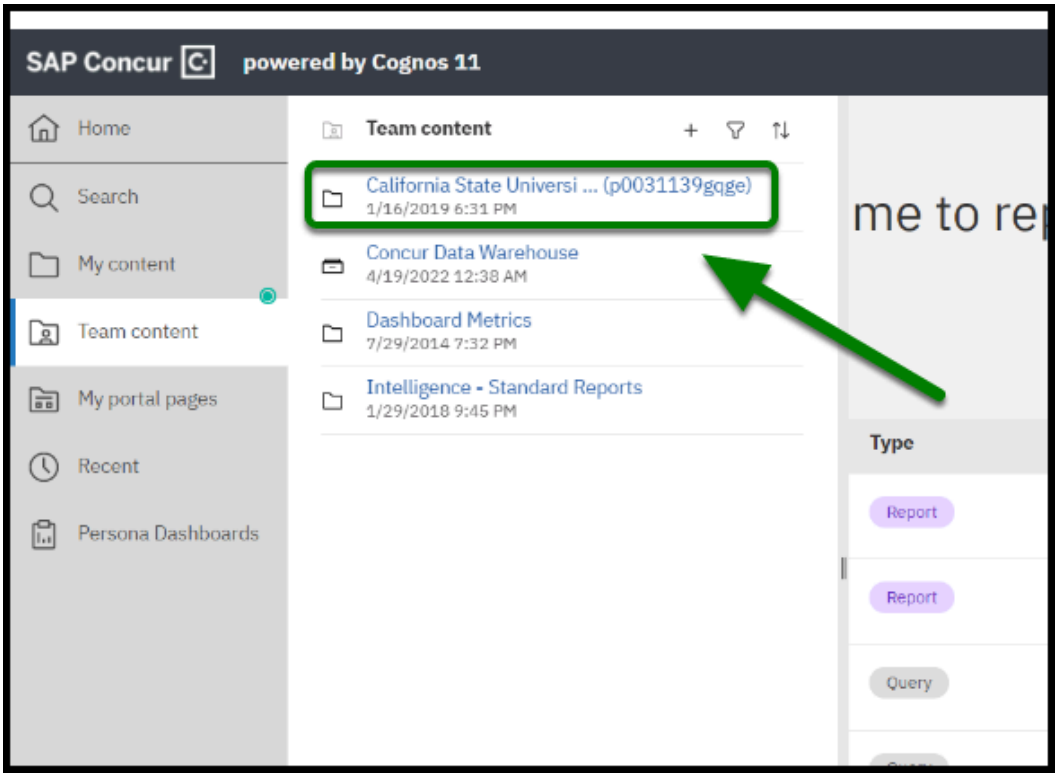
- **Intelligence**
- **Intelligence BI Manager**



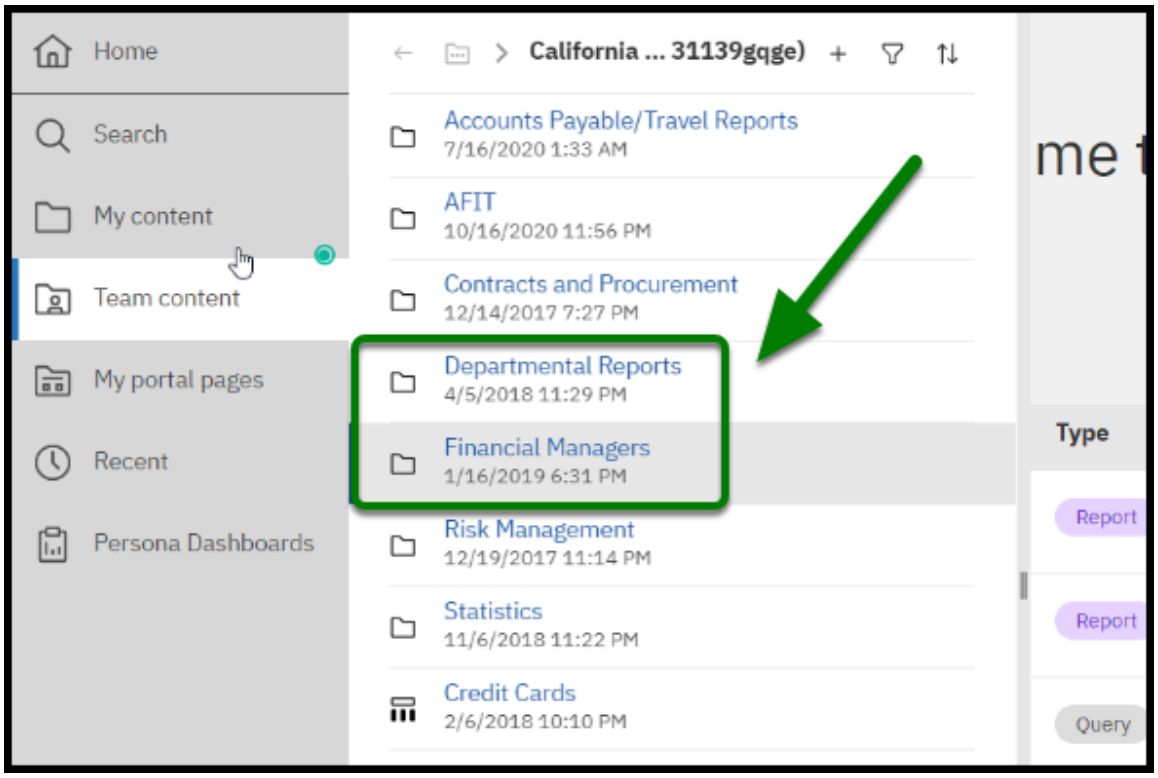
Step 2: Your screen will refresh, and you will be led to the following SAP Concur page. Click on **Team Content**.



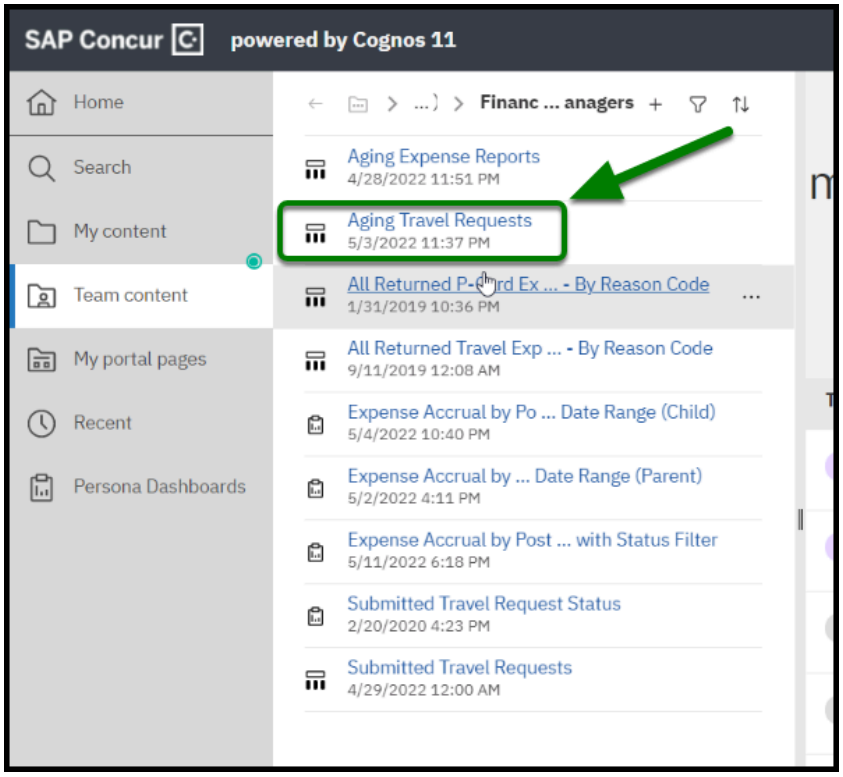
Step 3: From there, click on the **California State University (p0031139gqge)** folder.



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



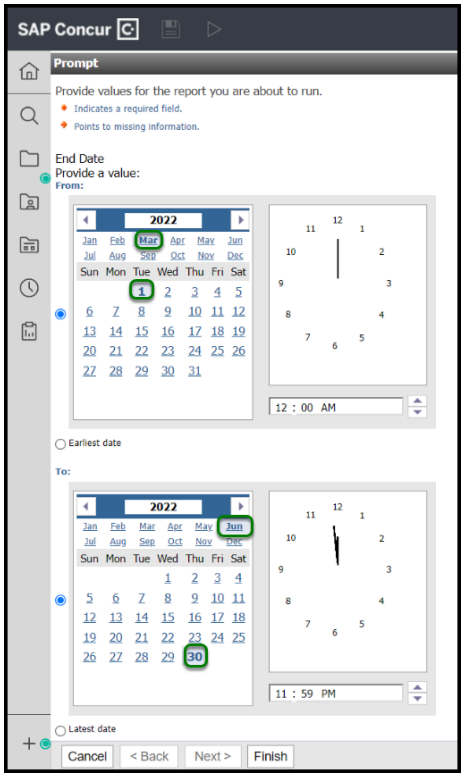
Step 5: There are different types of reports that you can run. For this example, we will select **Aging Travel Requests** available in the Financial Managers folder.



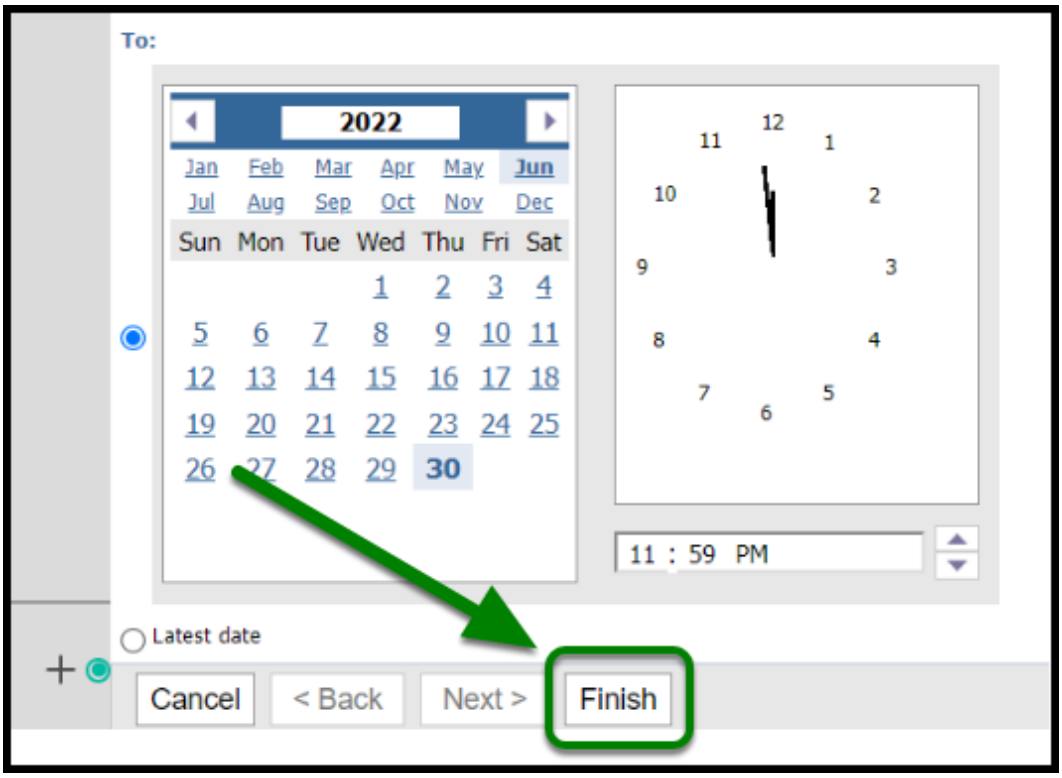
Step 6: Your screen will refresh, and you will be presented with the following calendar to select the appropriate date range that you would like to pull a report from.

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.

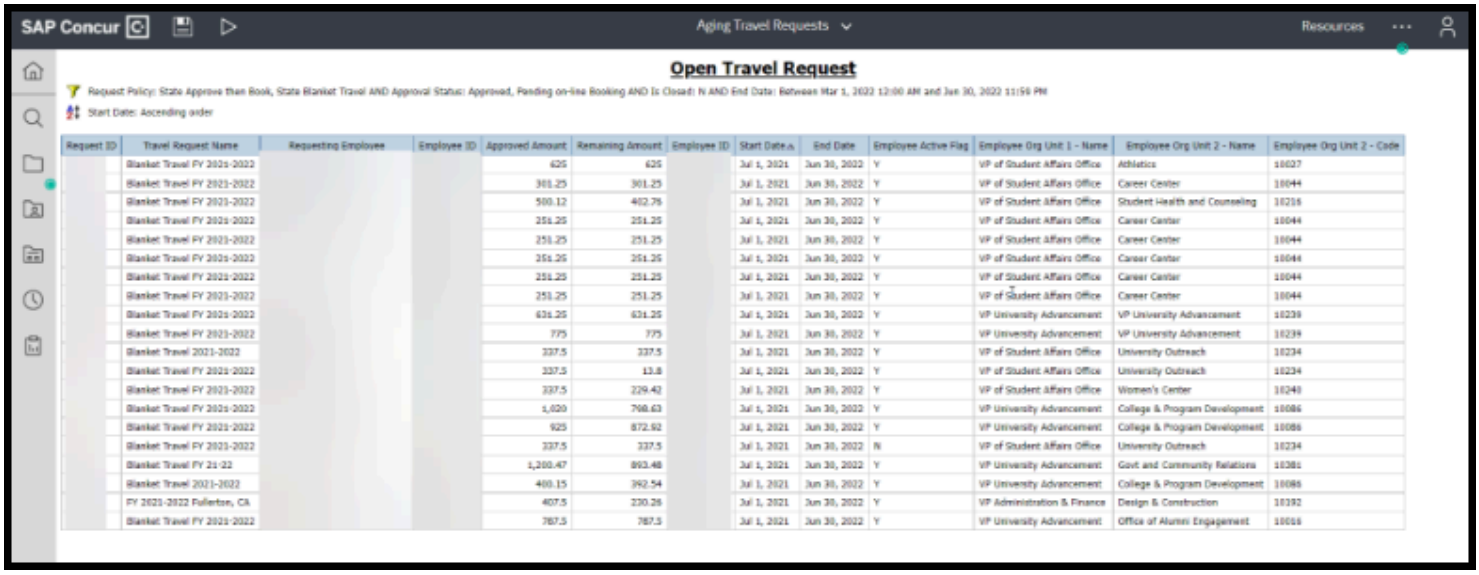
Note: The hourly ranges are recommended to be left as **12:00 AM** to **11: 59 PM.**



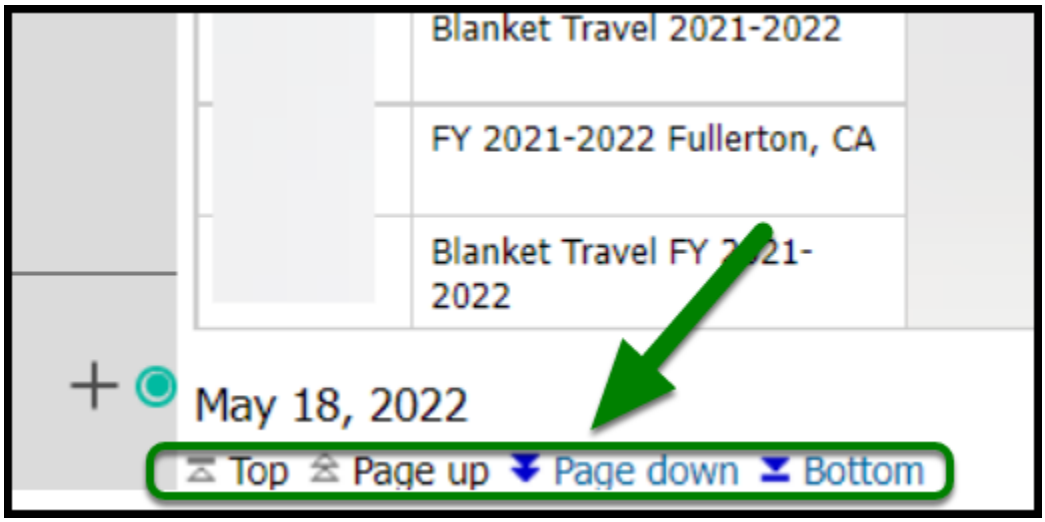
Step 7: Click on the **Finish** button.



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



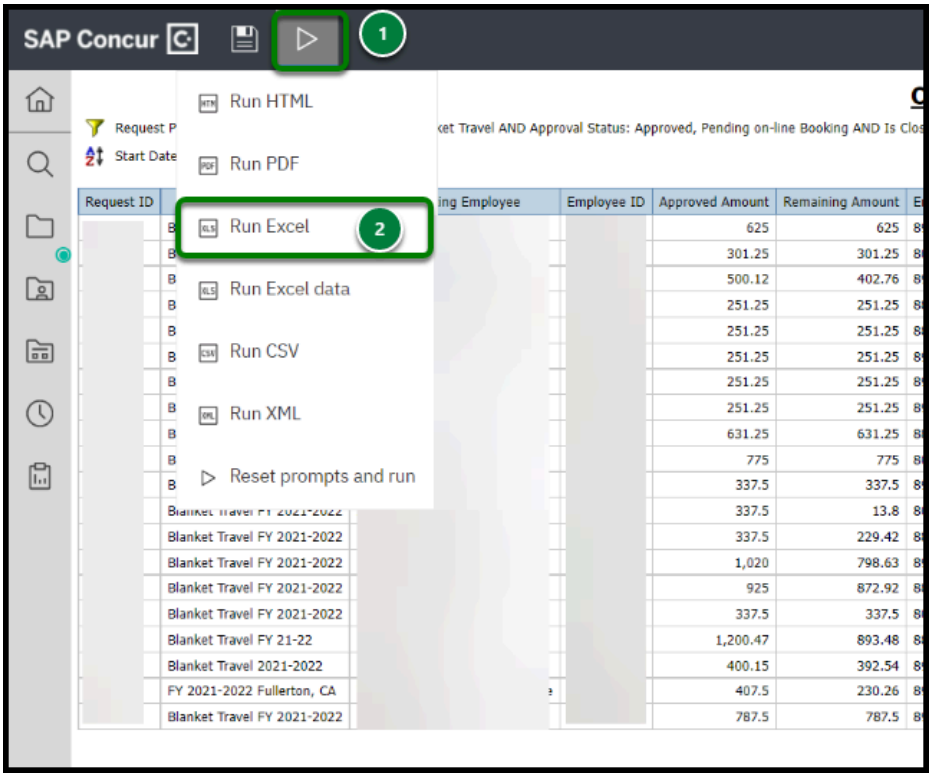
Step 7b: There may be several pages of data. You will have the option to click on **Top**, **Page up**, **Page down**, and **Bottom** to view them all.



Downloading a Report

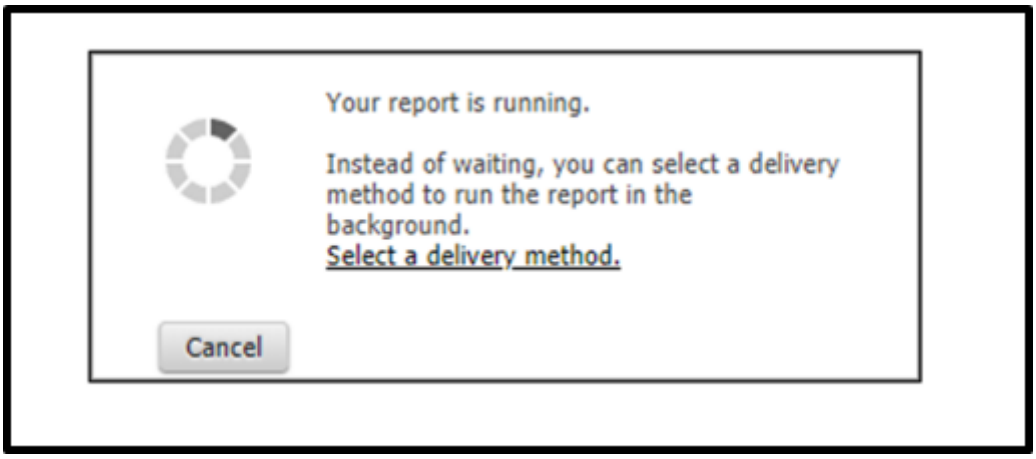
Step 8: To download the report, click on the following in order in the top-left of your screen:

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



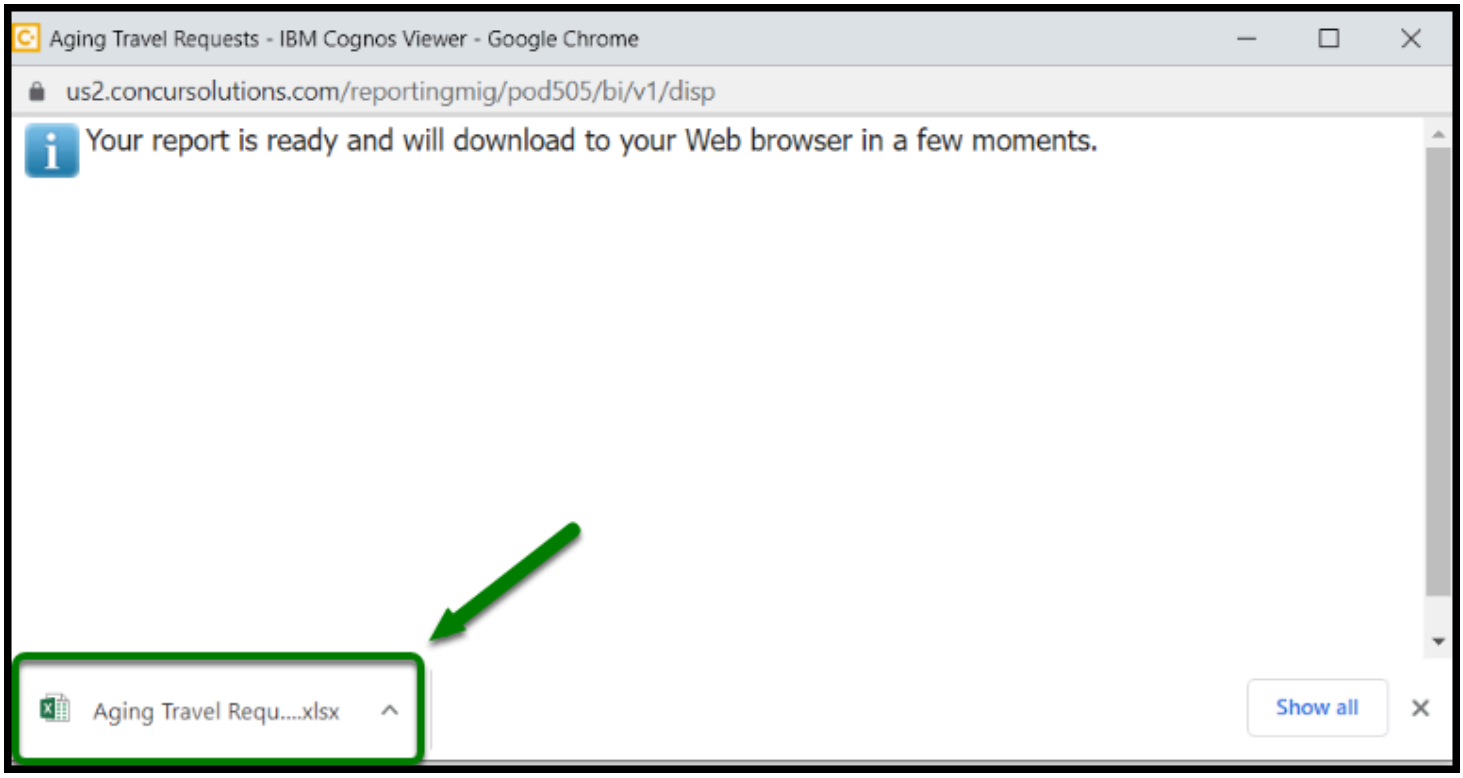
Step 9: Your page will refresh, and you will notice this loading screen. Please wait while your report is being generated.

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



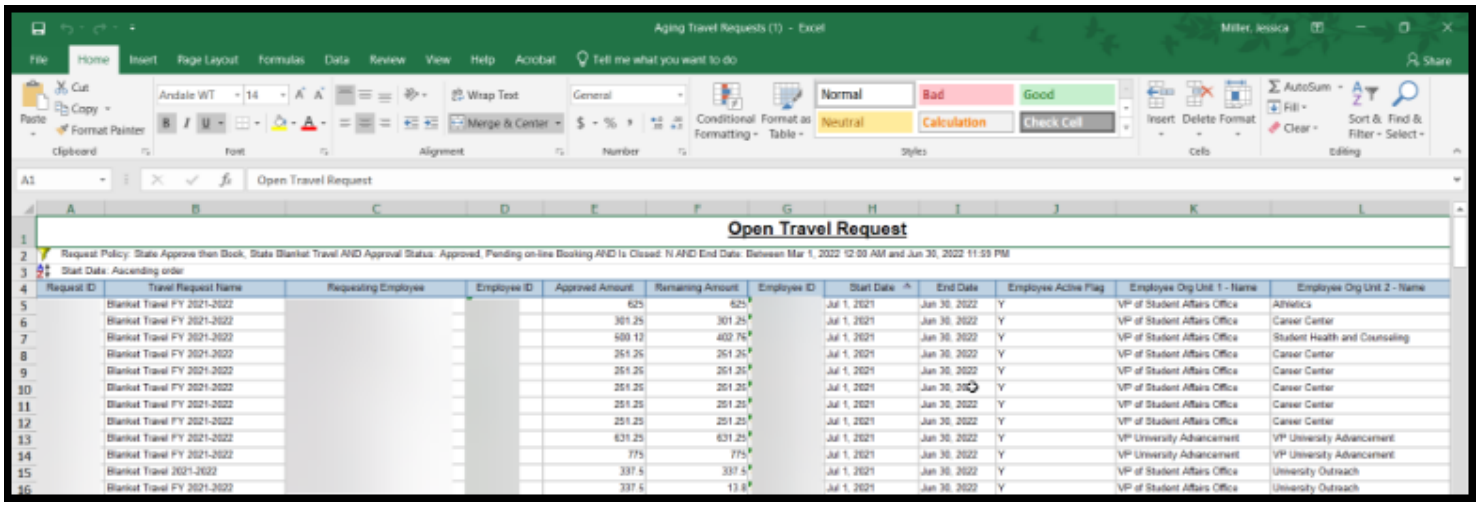
Step 10: If you are using Google Chrome, your downloaded report should appear on the bottom.

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.



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Need more help?

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