

QUICK REFERENCE GUIDE - TABLEAU CONCUR REPORTING

CONCUR DEADLINES

- Pro-card transactions and travel should be submitted to Accounts Payable by the 15th of the month following the transaction date/dates of travel. Reports should be fully processed no more than 60 days following the transaction date or last day of travel.
- Pro-cards with open transactions over 60 days old are at risk for suspension. Employees with open travel reimbursements over 60 days old will be reimbursed through payroll, and will be taxed on the reimbursement.
- Departments should run reports monthly to ensure pro-card and travel reports are going through workflow in a timely manner.
- There are two reports available in Tableau to view the status of your department's concur data -

View pro-card transactions not assigned to an expense report

← Explore / Business Officer Reports / Concur Reports / Concur Travel and Expense Management Reports / Procard Unassigned Transactions

[Click here](#) to open the Concur Travel and Expense Management Reports folder and access these reports

View open expense reports (pro-card and travel)

← Explore / Business Officer Reports / Concur Reports / Concur Travel and Expense Management Reports / Concur Expense Reports

It is important to ensure you are using appropriate filters when running reports. Be sure that all dates are selected, you have filtered to your specific department, and are including all data statuses so your report captures all information. Tableau is typically one day behind data in SAP/Concur, so remember that live actions in Concur will likely not be reflected in your report.

Find more financial resources on the [CAFE Business Center website](#).

Please contact the [CAFE Business Analysts](#) group via email with any finance-related questions.

Filters	
Transaction Date	5/28/2021 12/2/2022
Department Code	(All)
Department	(All)
Employee	(All)
Employee id	(All)
Transaction Status	UN

Filters	
Department Prefix	(All)
Department	(All)
Transaction Date	9/2/2020 8/12/2023
Is Posted to SAP	N
Employee	(All)
Is Deleted	N
Cost Object Code	
Cost Center Filter	(All)
Approval Status	(All)
Workflow	(All)
Action Completed	No
Report Id	(All)