

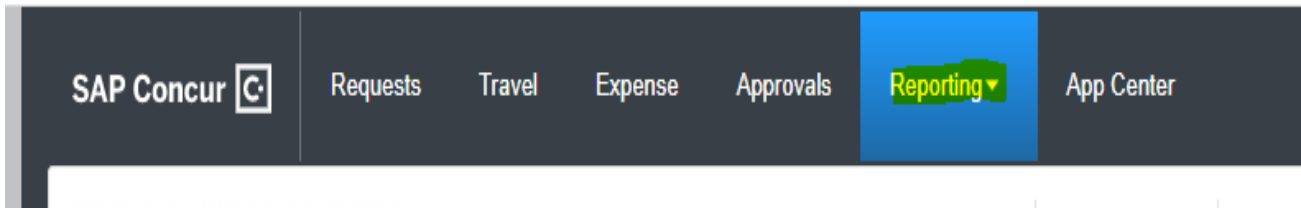
Job Aid: Reports of Delegates

Reports of Delegates

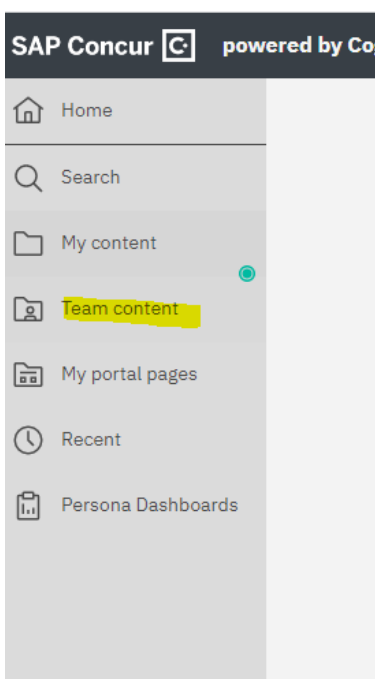
This report will show who delegates are for a traveler. Reports can only be generated by CBO's and supervisors they assign. Note: The shaded rows (below) are for Expense reports and the non-shaded rows are Requests.

Sign in to Concur. On the top ribbon, select Reporting:

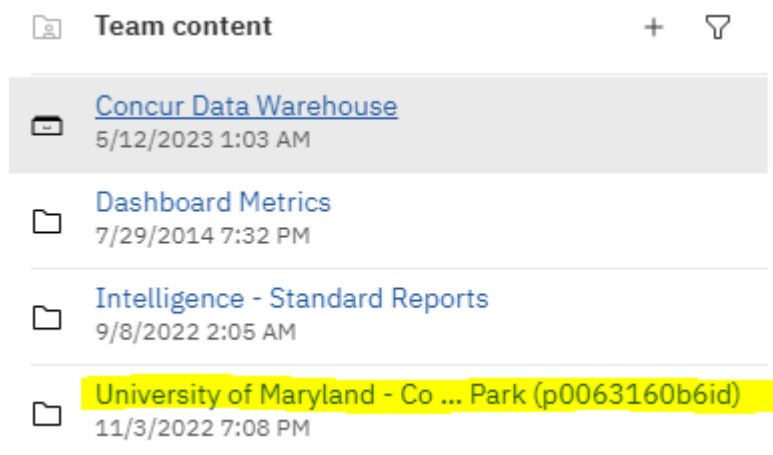
1 - On the top ribbon, select Reporting. Click the down arrow and select Intelligence.



2 - Select Team Content



3 - On the next screen, you will select University of Maryland – College Park



4 - Now select Employee Information

<	>	University of ... 0063160b6id)	+	🔍	↕
📁	Carbon Footprint	11/3/2022 7:16 PM			
📁	Credit Card	12/15/2022 5:42 PM			
📁	Employee Information	1/27/2023 5:39 PM			
📁	Expense Information	1/27/2023 8:32 PM			
📁	Request Information	3/3/2023 6:24 PM			
📁	System Admin	4/28/2023 8:43 PM			

5 - Then select Employee Delegates

<	>	U ... id)	>	Employ ... formation	+	🔍	↕
📁	Employee Delegates	5/26/2023 4:35 PM					
📁	Employee Details	2/13/2023 10:03 PM					
📁	Employee Roles	5/17/2023 7:48 PM					

6a - Supervisors can just hit the Finish button at the bottom and pull up their unit.

Those with divisional access can filter data for a particular unit by taking the following steps:

6b-You can search for specific delegates by choosing Division, Department, or Unit and selecting the dropdown that says “Contains any of these keywords.”

6c-Then enter keywords in the field, and click the magnifying glass to see the results. In the results panel, select your choice,

6d-click the Finish button at the bottom to generate the report for your hierarchy.

The screenshot displays a search interface titled "Select Campus, Division, Department, and/or Unit to View". It is organized into three main sections: "Campus:", "College:", and "Unit:". Each section contains a "Keywords:" search box with a magnifying glass icon and a "Choices:" list box. Below each search box is a dropdown menu for filtering options. In the "Campus:" section, the dropdown is set to "Contains any of these keywords". In the "Division:" section, it is set to "Starts with any of these keywords". In the "College:" section, it is set to "Contains any of these keywords". In the "Department:" section, it is set to "Starts with any of these keywords". In the "Unit:" section, it is set to "Starts with any of these keywords". A "Case Insensitive Keywords" checkbox is checked in each section. A "Finish" button is located at the bottom of the interface, circled in red. Red boxes labeled "6b" and "6c" are placed in the center, with red arrows pointing to the dropdown menus in the "Campus:" and "Division:" sections respectively. A red box labeled "6a, 6d" is placed at the bottom, pointing to the "Finish" button.

7 – A list of employee delegates will appear.

To download the list, click the down arrow to the right of the PLAY button and select the type of output you prefer, the report will generate.

