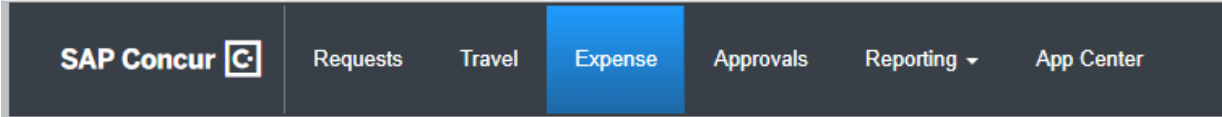


EXPENSE REPORT: Hospitality Attendees



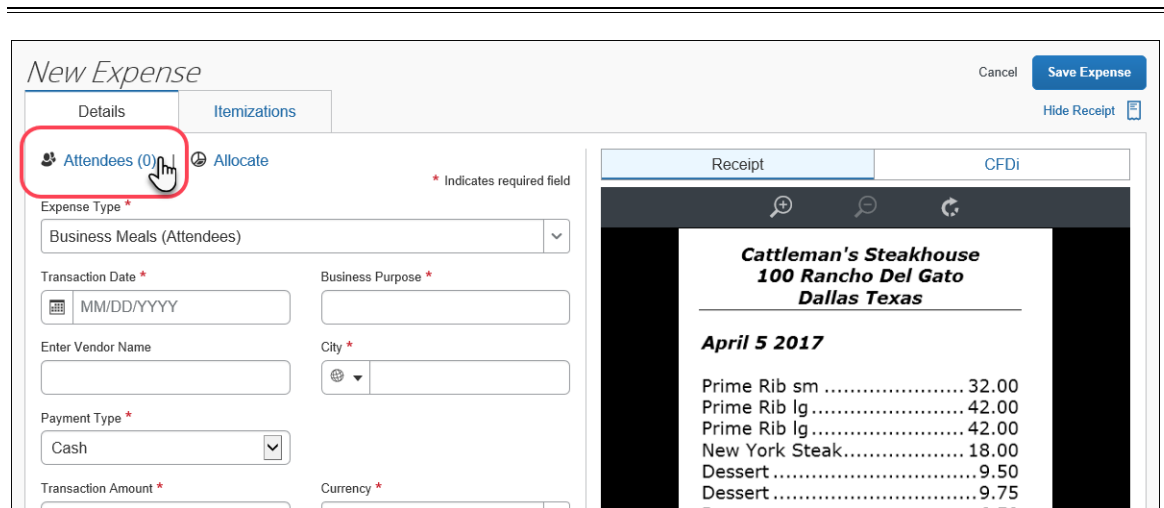
CAL POLY
Strategic Business Services
ADMINISTRATION & FINANCE

Attendees are added and managed on the **Attendees** page.

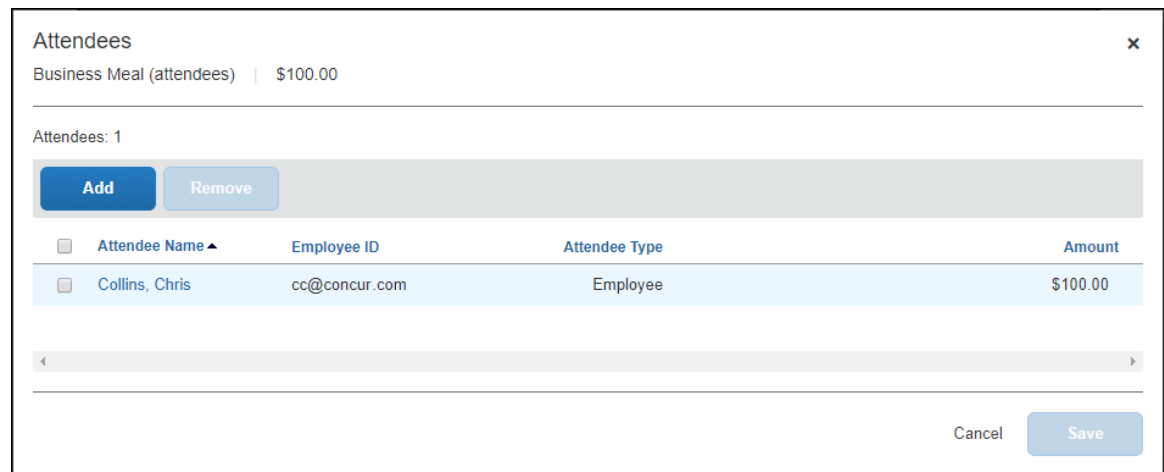
You can access the **Attendees** page by clicking the **Attendees** link on the **New Expense**, edit expected expense, and **Expected Expenses** pages. The **Attendees** link only appears for expense types that your company has defined as requiring attendees.

Add Attendees – Typical Process

1. Complete the expense and then click **Attendees** on the **New Expense** page.

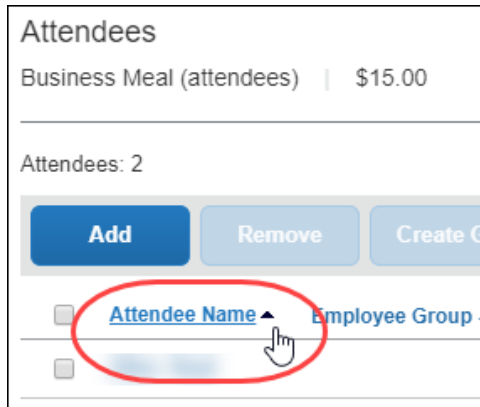


The **Attendees** page appears.

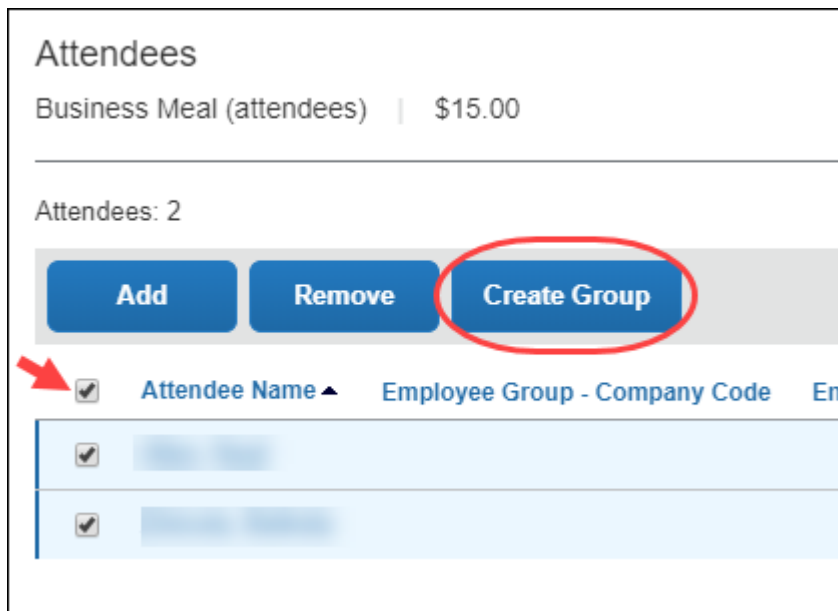


2. From the **Attendees** page you can add and remove attendees from the expected expense.

3. You can sort attendees on the **Attendees** page by clicking the sort arrow next to the **Attendee Name** column.



4. While viewing attendees on the **Attendees** page, you can select some or all of the attendees to create a reusable attendee group.
5. After selecting attendees, you can click **Create Group** to create an attendee group.

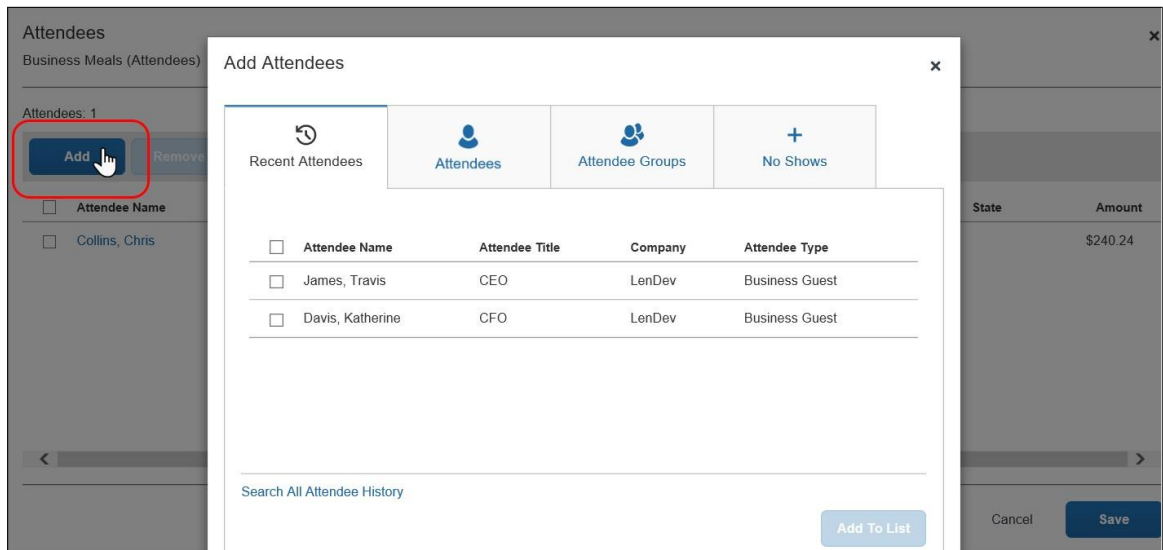


If Concur Request is connected to the report and if attendees are added for a request line item, you can copy these attendees from the linked request entry.

6. Click **Copy from Request** to copy attendees from the linked request entry.



7. To add an attendee to an expense, click **Add**. The **Add Attendees** window appears; all of the options for adding attendees to the expense are available in this window.



You can choose from recent attendees, add a new attendee, choose from attendee groups (and Favorites), or identify no-shows (if your configuration allows).

NOTE: To prevent duplicate attendees from being added to the expense, attendees who are already on the expense display in read-only, italicized text and cannot be selected (checked).

The screenshot shows a dialog box titled "Add Attendees" with a close button (X) in the top right corner. Below the title bar are three tabs: "Recent Attendees" (with a refresh icon), "Attendees" (with a person icon), and "Attendee Groups" (with a group icon). The "Attendees" tab is active. Below the tabs is a table with the following columns: "Attendee Name", "Attendee Title", "Company", "Attendee Type", and "Employee ID". There are two rows of data:

Attendee Name	Attendee Title	Company	Attendee Type	Employee ID
Doe, Jane			Employee	112410
<i>Smith, John</i>			<i>Employee</i>	<i>112345</i>

The row for "Smith, John" is circled in red. Below the table is a search bar with the text "Search All Attendee History". At the bottom right of the dialog is a blue button labeled "Add to List".

CHOOSE FROM RECENTLY USED ATTENDEES

A good place to start is with the **Recent Attendees** tab.

1. Select the check box for the desired attendee(s) and then click **Add to List**. The selected attendees will be added to the expected expense.

Add Attendees [Close]

Recent Attendees | Attendees | Attendee Groups | + No Shows

<input checked="" type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type
<input checked="" type="checkbox"/>	James, Travis	CEO	LenDev	Business Guest
<input checked="" type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest

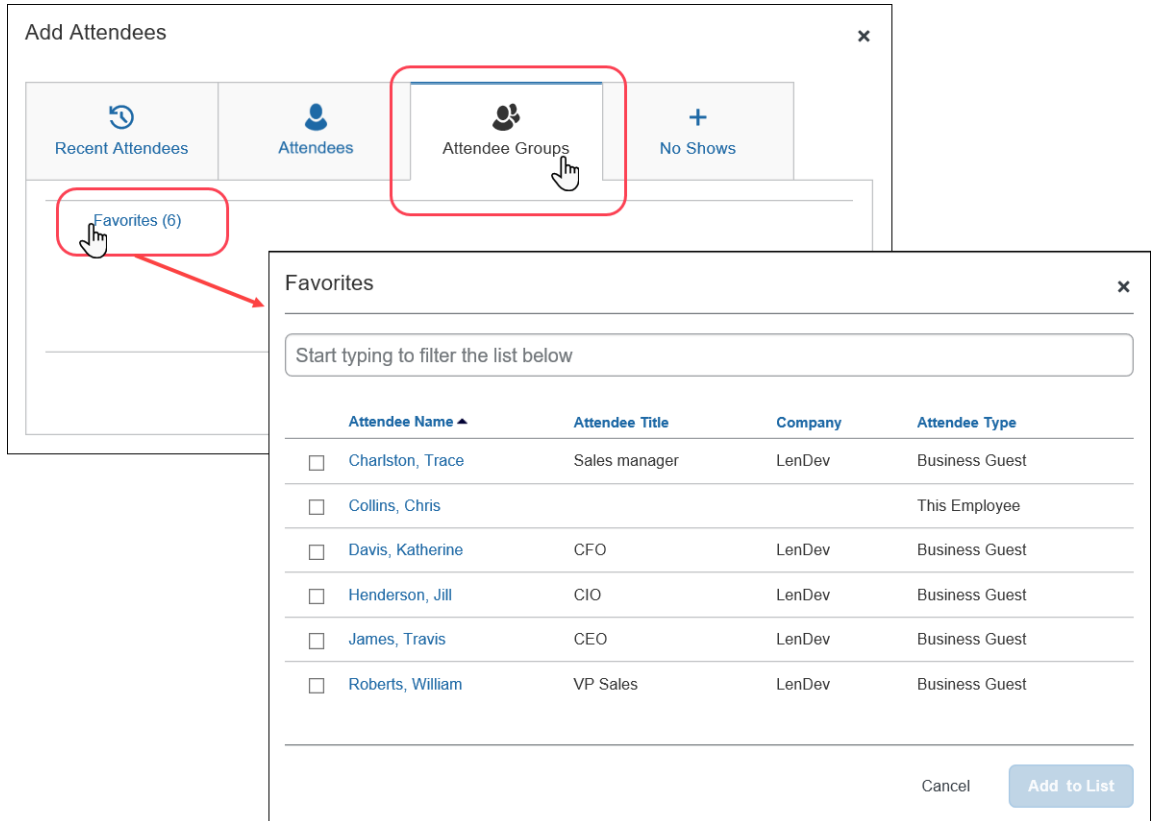
[Search All Attendee History](#)

Add to List

2. At the bottom of the **Recent Attendees** tab is the **Search All Attendee History** link. Click the link to see all attendees you have ever used - regardless of whether they are in your favorites.

CHOOSE FROM YOUR FAVORITES

To search for an attendee that you have designated as a favorite (in Profile) but who is not available on the **Recent Attendees** page, click **Attendee Groups**. The first group is Favorites. Click **Favorites**. The **Favorites** dialog appears.



The screenshot shows the 'Add Attendees' dialog with four tabs: 'Recent Attendees', 'Attendees', 'Attendee Groups', and 'No Shows'. The 'Attendee Groups' tab is selected and highlighted with a red box. Below it, a dropdown menu shows 'Favorites (6)' selected and highlighted with a red box. A red arrow points from this box to the 'Favorites' dialog box. The 'Favorites' dialog has a search bar and a table of attendees.

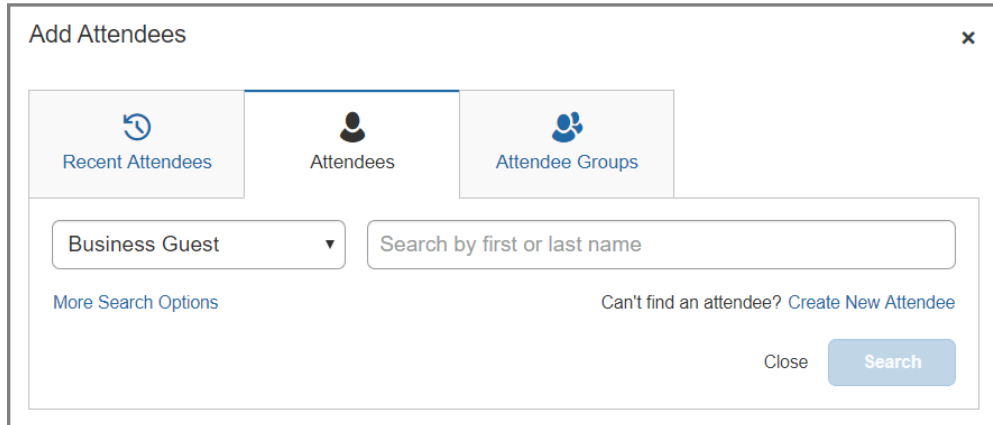
	Attendee Name ▲	Attendee Title	Company	Attendee Type
<input type="checkbox"/>	Charlston, Trace	Sales manager	LenDev	Business Guest
<input type="checkbox"/>	Collins, Chris			This Employee
<input type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest
<input type="checkbox"/>	Henderson, Jill	CIO	LenDev	Business Guest
<input type="checkbox"/>	James, Travis	CEO	LenDev	Business Guest
<input type="checkbox"/>	Roberts, William	VP Sales	LenDev	Business Guest

Select the check box for the desired attendee(s) and then click **Add to List**.

SEARCH FOR OTHER ATTENDEES

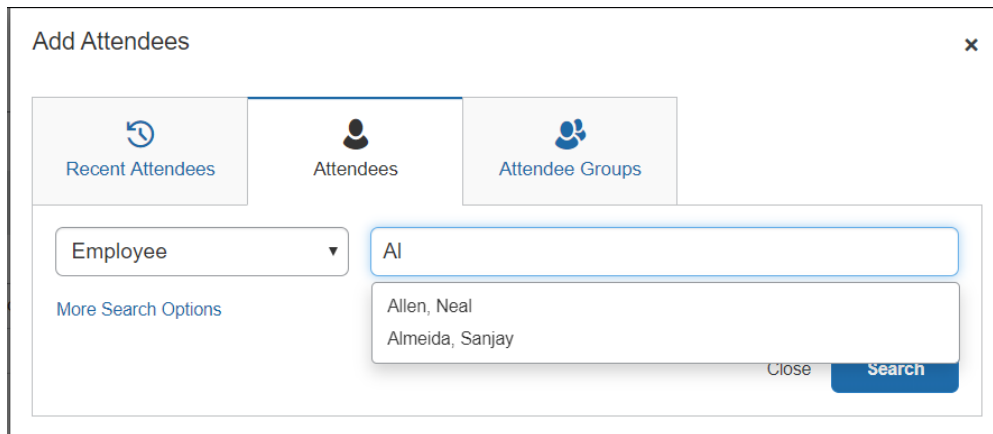
In the following example, assume that you want to add an attendee who is not available on the **Recent Attendees** tab or in Favorites. The first step is to search for the desired attendee.

1. Click the **Attendees** tab to search an attendee.



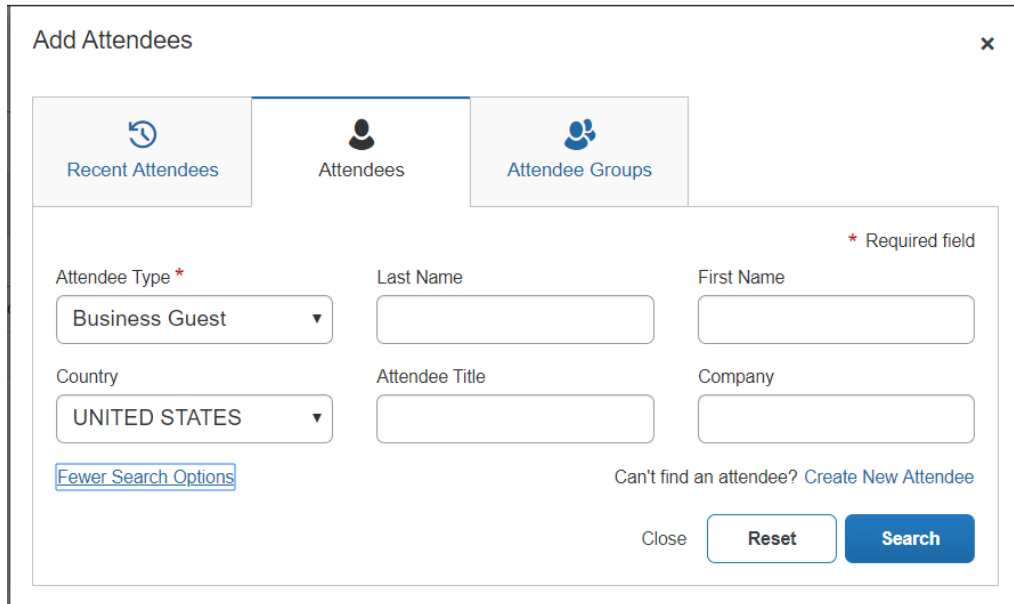
The screenshot shows the 'Add Attendees' dialog box. At the top, there are three tabs: 'Recent Attendees', 'Attendees', and 'Attendee Groups'. The 'Attendees' tab is currently selected. Below the tabs, there is a dropdown menu set to 'Business Guest' and a search input field with the placeholder text 'Search by first or last name'. Below the search field, there is a link for 'More Search Options' and a link that says 'Can't find an attendee? Create New Attendee'. At the bottom right, there are 'Close' and 'Search' buttons.

2. You can type characters in the search field to search for an attendee and the results will appear in the list.



This screenshot shows the 'Add Attendees' dialog box after a search. The 'Attendees' tab is still selected. The dropdown menu is now set to 'Employee'. The search input field contains the text 'AI'. Below the search field, a list of search results is displayed: 'Allen, Neal' and 'Almeida, Sanjay'. The 'Search' button is now highlighted in blue, indicating it has been clicked.

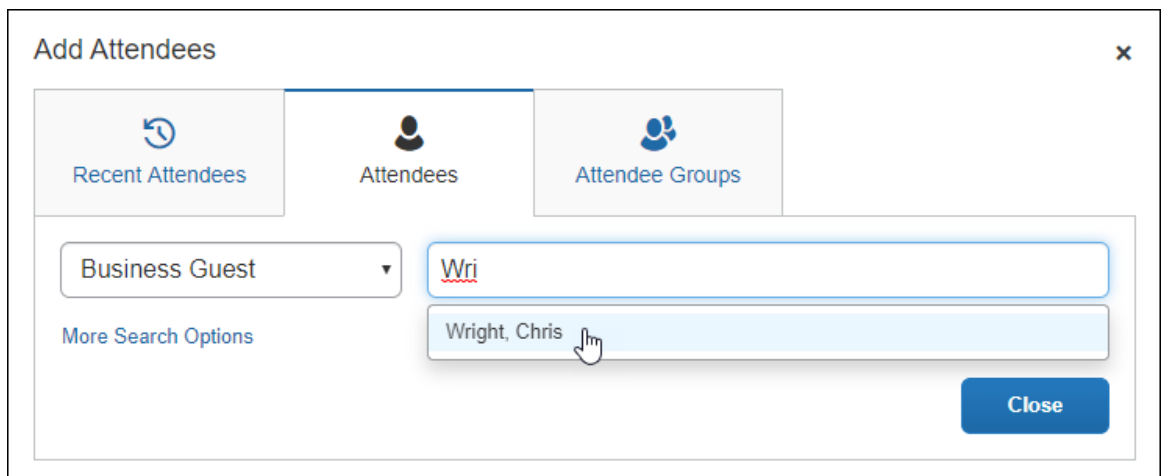
3. You can click on **More Search Options** to enter additional criteria using the advanced search fields.



The screenshot shows the 'Add Attendees' dialog box with the 'Attendees' tab selected. It features three tabs: 'Recent Attendees', 'Attendees', and 'Attendee Groups'. The 'Attendees' tab is active, displaying a form with the following fields: 'Attendee Type *' (dropdown menu set to 'Business Guest'), 'Last Name' (text input), 'First Name' (text input), 'Country' (dropdown menu set to 'UNITED STATES'), 'Attendee Title' (text input), and 'Company' (text input). A red asterisk indicates that the 'Attendee Type' field is required. Below the form, there is a link for 'Fewer Search Options' and a text prompt: 'Can't find an attendee? Create New Attendee'. At the bottom right, there are 'Close', 'Reset', and 'Search' buttons.

4. The **Fewer Search Options** link takes you back to the simple search fields. You can click **Reset** to clear any previous search criteria.

If you are performing a simple search, select the appropriate attendee type, begin entering the attendee name, and then click the attendee name to add it to the expected expense.



The screenshot shows the 'Add Attendees' dialog box with the 'Attendees' tab selected. The 'Attendee Type' dropdown menu is set to 'Business Guest'. The 'Last Name' text input field contains the text 'Wri'. A dropdown list below the input field shows a search result: 'Wright, Chris', with a mouse cursor hovering over it. To the left of the search input, there is a link for 'More Search Options'. At the bottom right, there is a 'Close' button.

If you are performing an advanced search, select the appropriate attendee type, and enter the search term(s) (for example, the first few letters of the attendee's last name), and then click the **Search** button.

Add Attendees ×

[Recent Attendees](#) **Attendees** [Attendee Groups](#)

Attendee Type * * Required field

Business Guest **Last Name**

Attendee Title

State

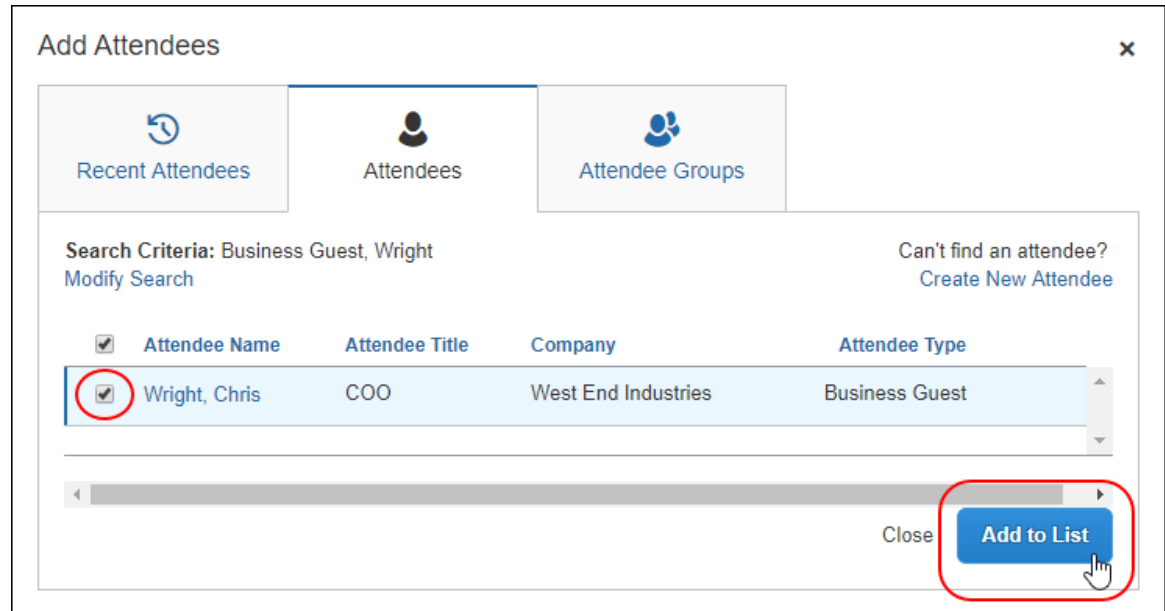
Total Amount YTD

[Fewer Search Options](#) [Can't find an attendee? Create New Attendee](#)

[Close](#) [Reset](#) [Search](#)

When you are performing an advanced search, after clicking **Search**, the search results appear on the **Attendees** tab with the search criteria displayed at the top of the search results.

Select the check box for the desired attendee and then click the **Add to List** button.



The screenshot shows a dialog box titled "Add Attendees" with a close button (X) in the top right corner. It features three tabs: "Recent Attendees", "Attendees", and "Attendee Groups". The "Attendees" tab is active. Below the tabs, the search criteria are displayed as "Business Guest, Wright" with a "Modify Search" link. To the right, there is a link "Can't find an attendee? Create New Attendee". A table lists search results with columns: "Attendee Name", "Attendee Title", "Company", and "Attendee Type". The first row is "Wright, Chris", "COO", "West End Industries", and "Business Guest". A red circle highlights the checkmark in the "Attendee Name" column for this row. At the bottom right, there is a "Close" link and a blue "Add to List" button, which is also circled in red with a hand cursor pointing to it.

<input checked="" type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type
<input checked="" type="checkbox"/>	Wright, Chris	COO	West End Industries	Business Guest

NOTE: If you do not find the desired attendee in the results, you can click the **Modify Search** link to modify your search criteria and try again.

CREATE NEW ATTENDEE

1. If you want to create a new attendee manually (and if you are allowed to by your company's configuration), click the **Attendees** tab, and then click the **Create New Attendee** link.

The simple search's "No Results" message includes a **Create New Attendee** link.

Add Attendees ✕

[Recent Attendees](#) [Attendees](#) [Attendee Groups](#)

Business Guest

[More Search Options](#)

No Results. Ensure the spelling and attendee type are correct.
Can't find an attendee? [Create New Attendee](#)

[Close](#) [Search](#)

The advanced search's "No Results" message also includes the **Create New Attendee** link.

The screenshot shows a dialog box titled "Add Attendees" with a close button (X) in the top right corner. Below the title bar are three tabs: "Recent Attendees" (with a refresh icon), "Attendees" (with a person icon), and "Attendee Groups" (with a group icon). The "Attendees" tab is selected. A light blue information box contains the message: "No Results. Ensure the spelling and attendee type are correct. Can't find an attendee? [Create New Attendee](#)". Below this, there are form fields for "Attendee Type" (a dropdown menu set to "Business Guest"), "Last Name" (text input with "Godrigue"), and "First Name" (text input with "Ayes"). A red asterisk and the text "* Required field" are positioned to the right of the "Attendee Type" label. Below these are "Attendee Title" and "Company" text input fields. At the bottom left is a link "Fewer Search Options". At the bottom right is the text "Can't find an attendee? [Create New Attendee](#)". At the very bottom are three buttons: "Close", "Reset", and "Search".

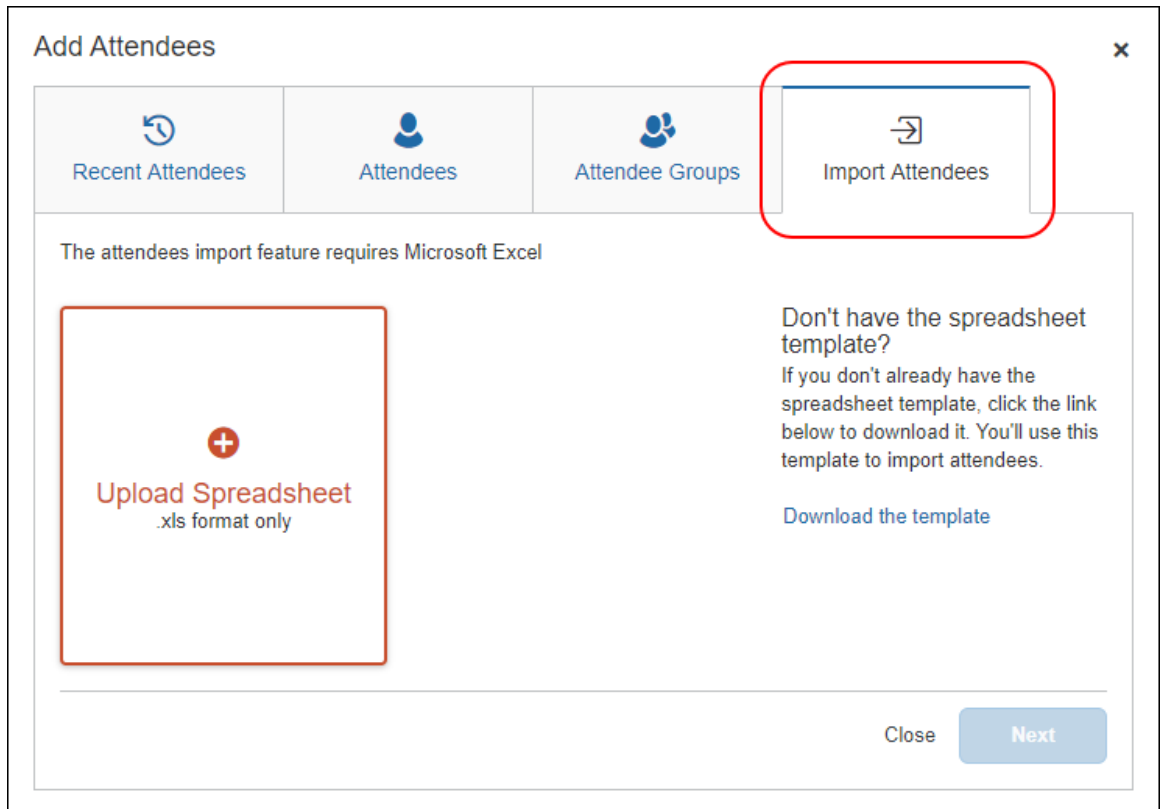
And the advanced search's "Can't find an attendee" message also includes the [Create New Attendee](#) link.

The screenshot shows a dialog box titled "Search For Attendee" with a close button (X) in the top right corner. Below the title bar, the search criteria are displayed: "Search Criteria: Business Guest, Smith" and a link "Modify Search". A light blue information box contains the message: "Can't find an attendee? [Create New Attendee](#)". Below this is a table with the following columns: "Attendee Name", "Attendee Title", "Company", and "Attendee Type". The table contains one row: "Smitha, X" (with a checkbox), "Business Guest". A horizontal scrollbar is located below the table. At the bottom right are two buttons: "Close" and "Add to List".

IMPORT ATTENDEES

The personal attendee import benefits users who must list a large number of attendees – up to 500 attendees – for example, for seminars or department functions. The attendees import uses a Microsoft Excel spreadsheet template to import attendees into an expense.

When the personal attendee import is configured for your organization, the **Import Attendees** tab is displayed in the **Add Attendees** dialog.



To import attendees into an expected expense:

1. Complete the expense and then click the **Attendees** link on the **New Expense** page.

To add an attendee to an existing expense, on the expense details page, click the **Attendees** link.

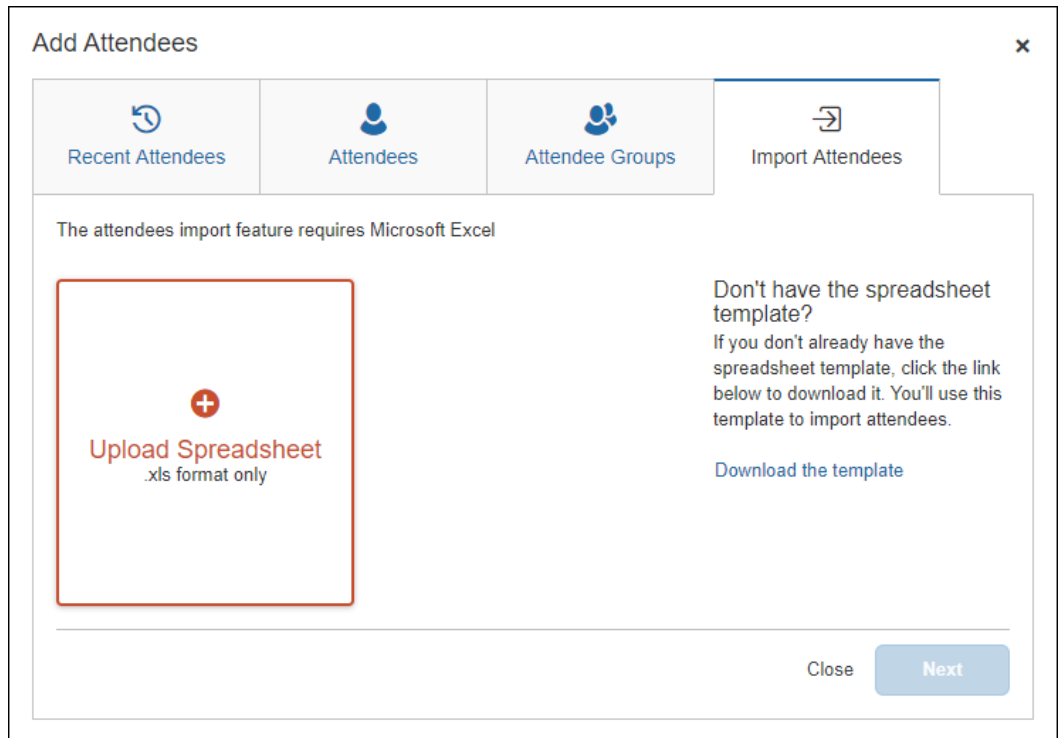
The **Attendees** page appears.

NOTE: The **Attendees** link appears only for Hospitality Expense Type

2. Click **Add**.

Clicking **Add** opens **Add Attendees** dialog. If your company allows you to import attendees, the **Import Attendees** tab is available.

3. Click the **Import Attendees** tab.



Attendees are imported using a Microsoft Excel spreadsheet created using the attendee spreadsheet template, which is formatted with the attendee fields.

NOTE: The attendee import only supports the Excel .xls file format.

4. If you have already downloaded and populated the attendee import template Excel spreadsheet, click **Upload Spreadsheet**.

Select the Excel spreadsheet, and then click **Open**.

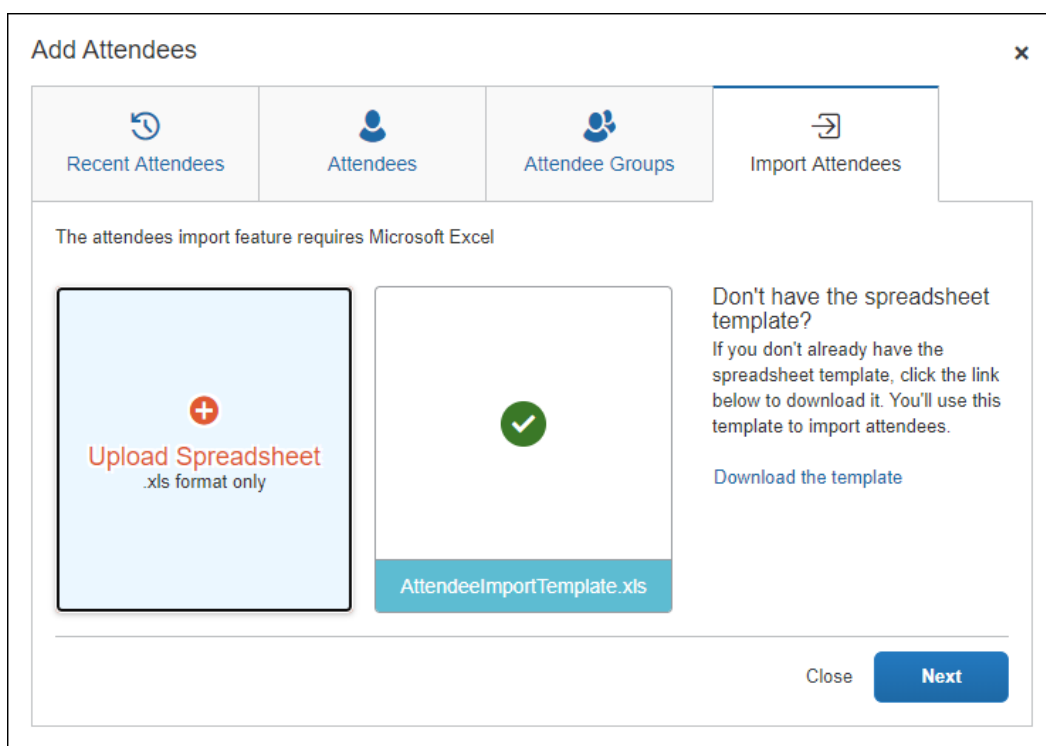
5. If you need to create an Excel spreadsheet using the attendee import template, click **Download the template**.

Clicking **Download the template** downloads the AttendeeImportTemplate.xls attendee import template file.

- ◆ Save the AttendeeImportTemplate.xls file to your computer or network.
- ◆ Open the AttendeeImportTemplate.xls file in Microsoft Excel.

- ◆ Enter the attendee records (up to and not over 500 attendees).
 - ◆ Save your changes to the attendee import spreadsheet.
 - ◆ Click **Browse**.
 - ◆ On the **Import Attendees** tab, click **Upload Spreadsheet**.
 - ◆ Select the attendee import spreadsheet, and then click **Open**.
6. Once the attendee import spreadsheet is successfully uploaded, click **Next**.

When an Excel spreadsheet is successfully uploaded, a tile containing the spreadsheet file name and a green circle with a check mark appears on the **Import Attendees** tab.



Clicking **Next** opens the **Import Attendees** dialog with the attendee information from the Excel spreadsheet displayed.

Import Attendees ✕

[← Go Back](#)

The following attendees were included on the spreadsheet. Click Next to continue. Entries: 6

Row	Attendee Type	Last Name	First Name	Attendee Title	Company, Institution/Practice, Company	State	Project ID	External ID	Recipient Type/Professional Designation
1	Business Guest	Diaz	Keith	VP	Microsoft	WA			
2	Business Guest	Shea	Marra	SVP	Microsoft	WA			
3	Business Guest	Pete	Kc	VP	Amazon	WA			
4	Business Guest	Brown	Susan	Director	Amazon	WA			
5	Business Guest	Clark	Emilia	VP	PharmaTech	WA			
6	Business Guest	Nate	Sean	Director	PharmaTech	WA			

[Cancel](#) [Next](#)

7. Review the information for accuracy.

If the information is correct, click **Next**.


If the information is not correct, click **Cancel**, correct the attendee information in the Excel spreadsheet, and then import the updated spreadsheet.

When you click **Next**, Concur Expense checks for required fields. If it finds missing required fields, a message appears, indicating that the listed attendee(s) cannot be imported.

Import Attendees ✕

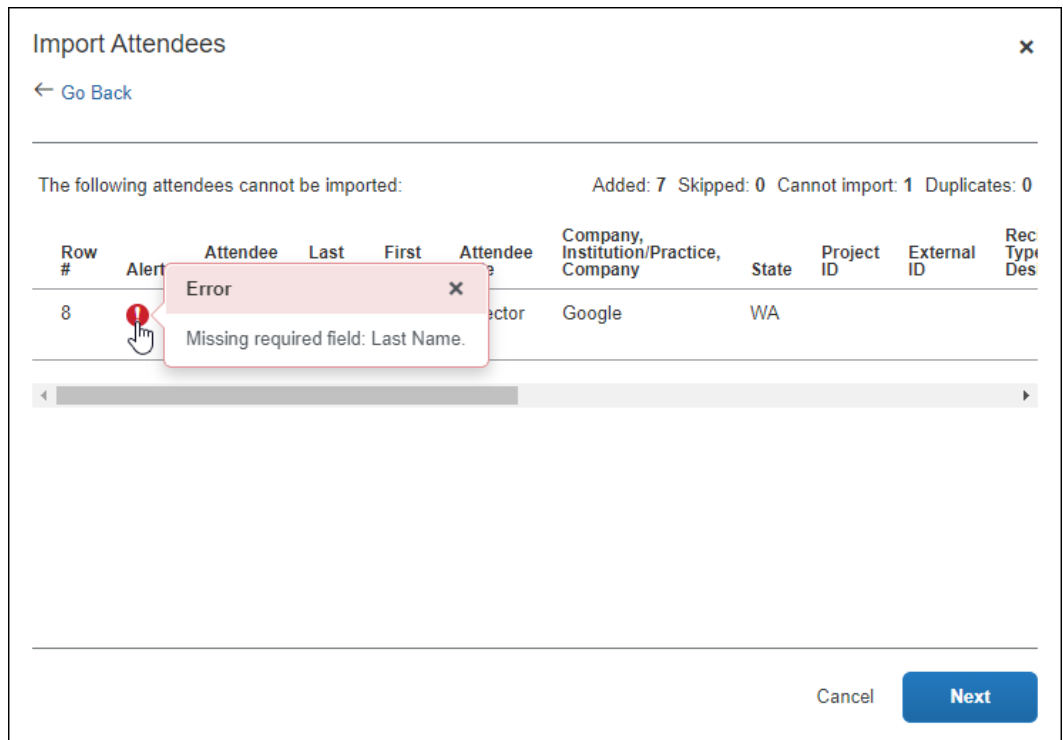
[← Go Back](#)

The following attendees cannot be imported: Added: 1 Skipped: 6 Cannot import: 1 Duplicates: 0

Row #	Alerts	Attendee Type	Last Name	First Name	Attendee Title	Company, Institution/Practice, Company	State	Project ID	External ID	Rec Type Des
8		Business Guest			Director	Google	WA			

[Cancel](#) [Next](#)

Click the red circle in the **Alerts** column for an attendee to view the reason for the attendee error.



8. If you want to correct the attendees with errors, click **Cancel**, correct the attendee information in the Excel spreadsheet, and then import the updated spreadsheet.

If you want to continue, click **Next**.

In the next step, the system checks for possible duplicates by comparing the attendees on the worksheet to attendees already in the system. The possible duplicates from the worksheet appear in the **Imported Attendee** section of the dialog. When you select an attendee in the top dialog, the possible duplicate attendee(s) appears in the **Duplicates** section of the dialog.

9. If a possible duplicate (from the spreadsheet) truly is an existing attendee, select the attendee in the **Duplicates** section of the dialog and click **Use Selected Attendees**.

If the possible duplicate (from the spreadsheet) is not an existing attendee, click **Continue Adding New Attendee**.

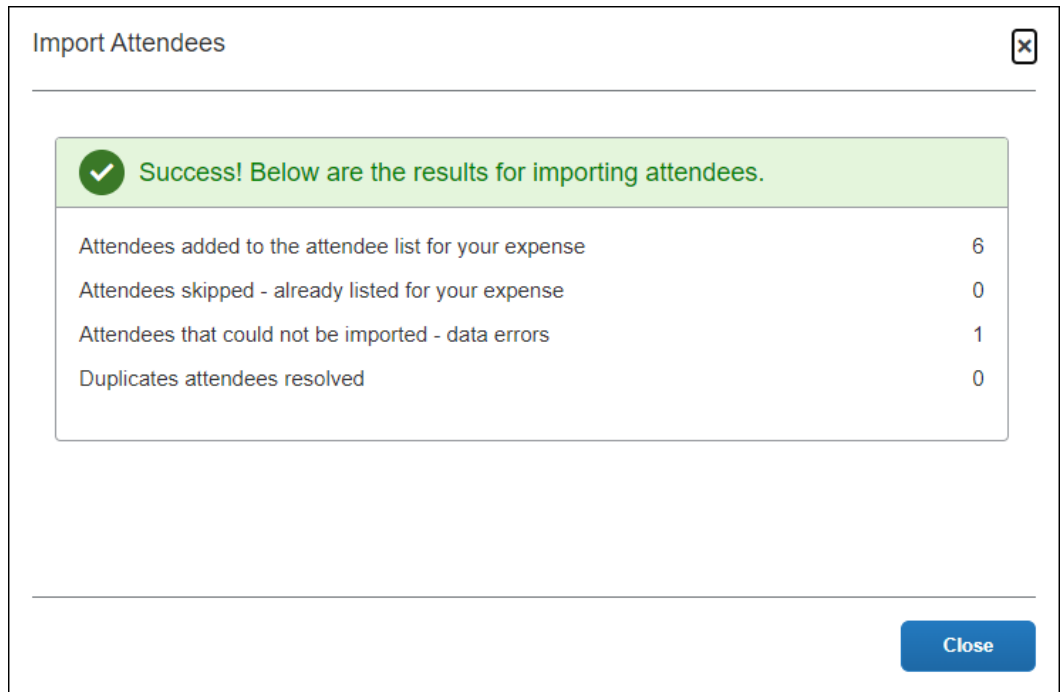
Note the following:

- ◆ Duplicate records still count against the overall import limit.
- ◆ If the system finds more than one possible duplicate (so that several names

are listed at the top and bottom of the dialog), the user deals with each one individually

10. Click **Next**.

The final dialog appears, showing the number of attendees imported, number of attendees skipped, the number of attendees that could not be imported, and the number of duplicate attendees resolved.



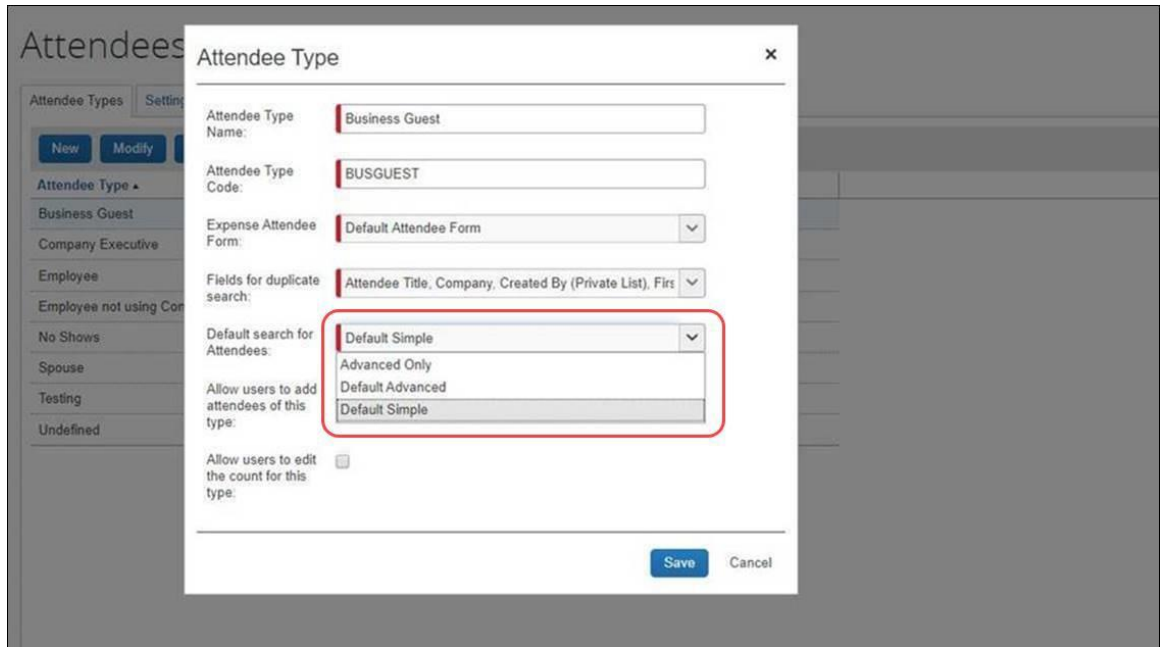
11. Click **Close**.

The attendees are imported into the expected expense.

Default Search Option per Attendee Type

For each Attendee Type, admins can configure a default search to optimize the experience. The choices are:

- *Default Simple* – This choice prompts the user with the type-ahead field where the user can enter first or last name of the attendee and provides access to the advanced search.
- *Default Advanced* – This choice prompts the user with the advanced options and provides access to the simple search.
- *Advanced Only* – This choice provides the user with the advanced search and does not provide access to the simple search.



Manage Duplicate Attendees

When you attempt to add a new attendee and click **Create Attendee** (as described above), Concur Expense immediately searches for duplicates. If Concur Expense finds a duplicate attendee, you are prompted to use the duplicate or to add the new attendee if, in fact, they are not the same person.

