EXPENSE REPORT: Hospitality Attendees
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.

   ![New Expense Page](image)

   The **Attendees** page appears.

   ![Attendees Page](image)

   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.

```
<table>
<thead>
<tr>
<th>Attendees</th>
<th>$15.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Meal (attendees)</td>
<td>$15.00</td>
</tr>
</tbody>
</table>
```

Attendees: 2

Add | Remove | Create Group

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.

```
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Attendees: 2

Add | Remove | Create 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).
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.

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.

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.

![Add Attendees](image1)

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

![Add Attendees](image2)
3. You can click on **More Search Options** to enter additional criteria using the advanced search fields.

   ![Expense Report – Hospitality Attendees](image)

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.

   ![Expense Report – Hospitality Attendees](image)

   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:
- Business Guest

Last Name:
- Wright

First Name:

Company:

State:

Total Amount YTD:

Can't find an attendee? Create New Attendee

Search

Reset

Close
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.

![Add Attendees](image)

**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

smi

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.

And the advanced search's "Can't find an attendee" message also includes the **Create New Attendee** link.
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.

![Add Attendees dialog](image)

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.

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.
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.

![Import Attendees](image)

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.