


# EXPENSE REPORT: Hospitality Attendees

SAP Concur  Requests Travel **Expense** Approvals Reporting ▾ App Center



**CAL POLY**  
Strategic Business Services  
ADMINISTRATION & FINANCE

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

For business meals or entertainment expenses, you must identify all attendees associated with the expense. Users can add attendees and attendee groups to the system in the Expense Profile Settings (See **Favorite Attendees** section for instructions).

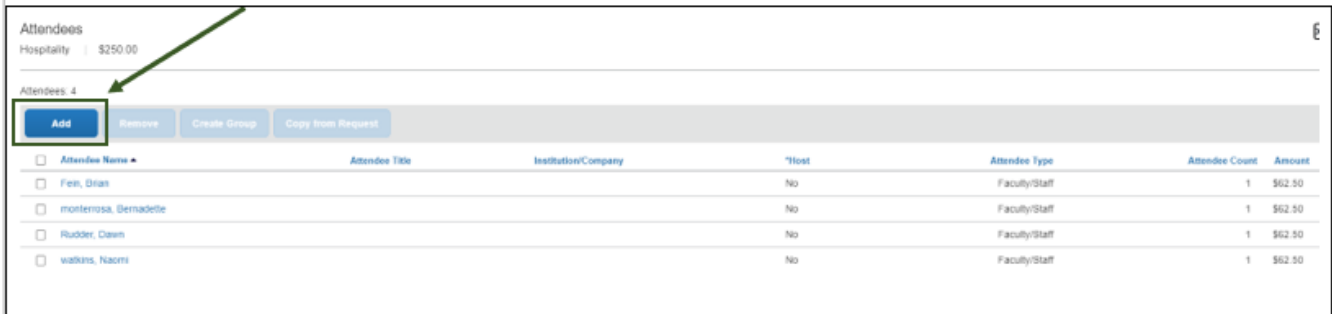
**To add one or more individual attendees to an expense:**

Select the Expense Type - Hospitality. Complete the necessary fields.

1. Click **Attendees**, then click **Add**.

The screenshot shows a mobile application interface for entering an expense. At the top, the title is "Hospitality \$250.00" with a trash icon. Below the title is the date "08/24/2020". There are two tabs: "Details" (selected) and "Itemizations". In the top right corner, there are "Cancel" and "Save Expense" buttons. In the bottom left corner, there are "Save Expense" and "Cancel" buttons. The "Details" section includes a link for "Attendees (4)" with a green arrow pointing to it, and an "Allocate" button. Below this are several required fields: "Expense Type" (Hospitality), "Transaction Date" (08/24/2020), "City of Purchase" (Long Beach, California), "Payment Type" (University Paid), "Amount" (250.00), and "Currency" (US, Dollar). There is also a "Comments To/From Approvers/Processors" text area. On the right side, there is a large red-bordered area with a plus sign icon and the text "Attach Receipt Image".

- For new attendees, select **Attendees**. Other options are **Recent Attendees** and **Attendee Groups**



Attendees  
Hospitality | \$250.00

Attendees: 4

**Add** Remove Create Group Copy from Request

<input type="checkbox"/> Attendee Name	Attendee Title	Institution/Company	Host	Attendee Type	Attendee Count	Amount
<input type="checkbox"/> Fern, Brian			No	Faculty/Staff	1	\$62.50
<input type="checkbox"/> monterrosa, Bernadette			No	Faculty/Staff	1	\$62.50
<input type="checkbox"/> Rudder, Dawn			No	Faculty/Staff	1	\$62.50
<input type="checkbox"/> walshs, Naomi			No	Faculty/Staff	1	\$62.50

- Select Attendee Type, then search by first or last name.
- If this is the first time this attendee has been used, you will need to **Create New Attendee**. This option pops up when it cannot find the attendee name
- Click **Save & Add Another** or **Save** if done adding attendees.



Add Attendees

Recent Attendees Attendees Attendee Groups

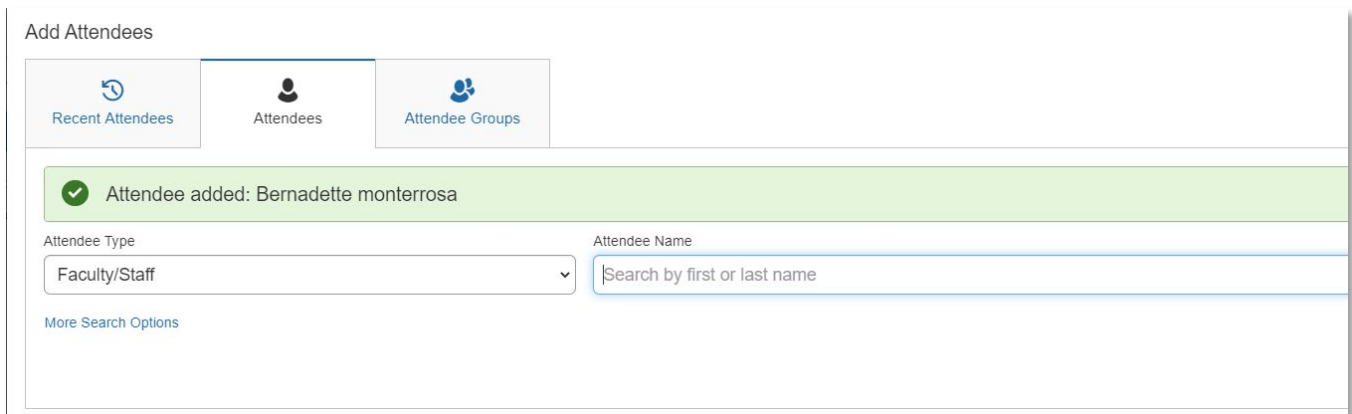
Attendee Type: Alumni

Attendee Name: Search by first or last name

More Search Options

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

Close



Add Attendees

Recent Attendees Attendees Attendee Groups

Attendee added: Bernadette monterrosa

Attendee Type: Faculty/Staff

Attendee Name: Search by first or last name


More Search Options

2. Attach completed Concur Hospitality Form. Use **Attach Receipt Image** to append the form to the itemized receipt.


### Attach Receipt

Select a receipt image or reuse one from this report:

Available Receipts Receipts in Report

  
**Upload Receipt Image**  
5MB limit per file

**Conference receipt.pdf**  
Uploaded: 9/8/2020 1:20 PM



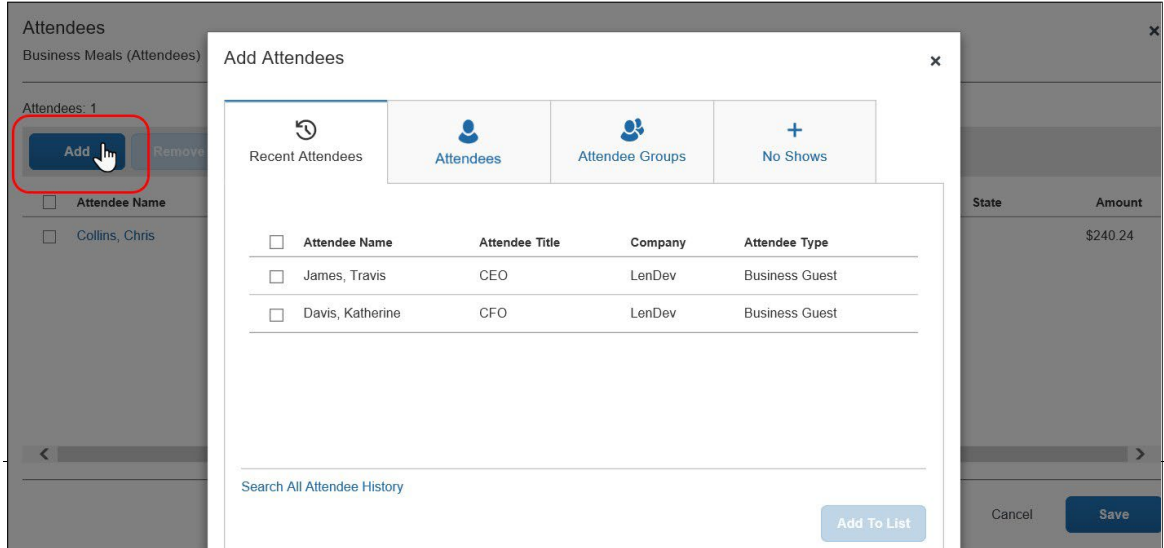
[Attach](#) [View](#)

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## Additional Ways to Attend Attendees Previously Added

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.



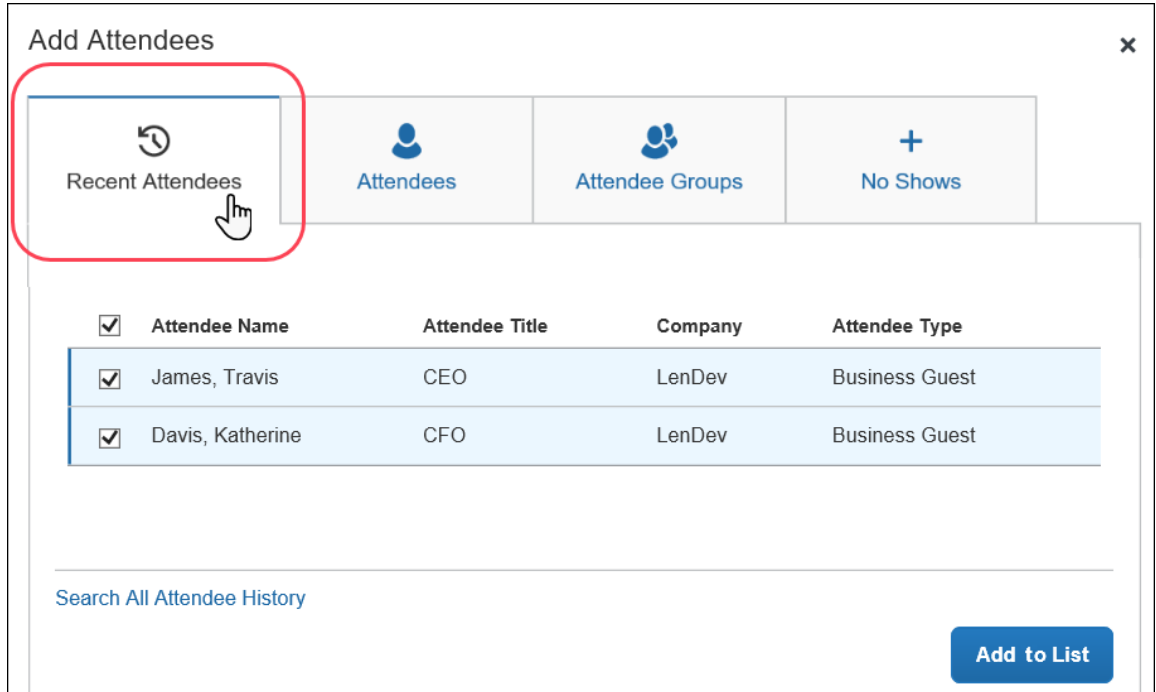
You can choose from recent attendees, add a new attendee, choose from attendee groups (and Favorites), or identify no-shows (if your configuration allows).

**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. 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

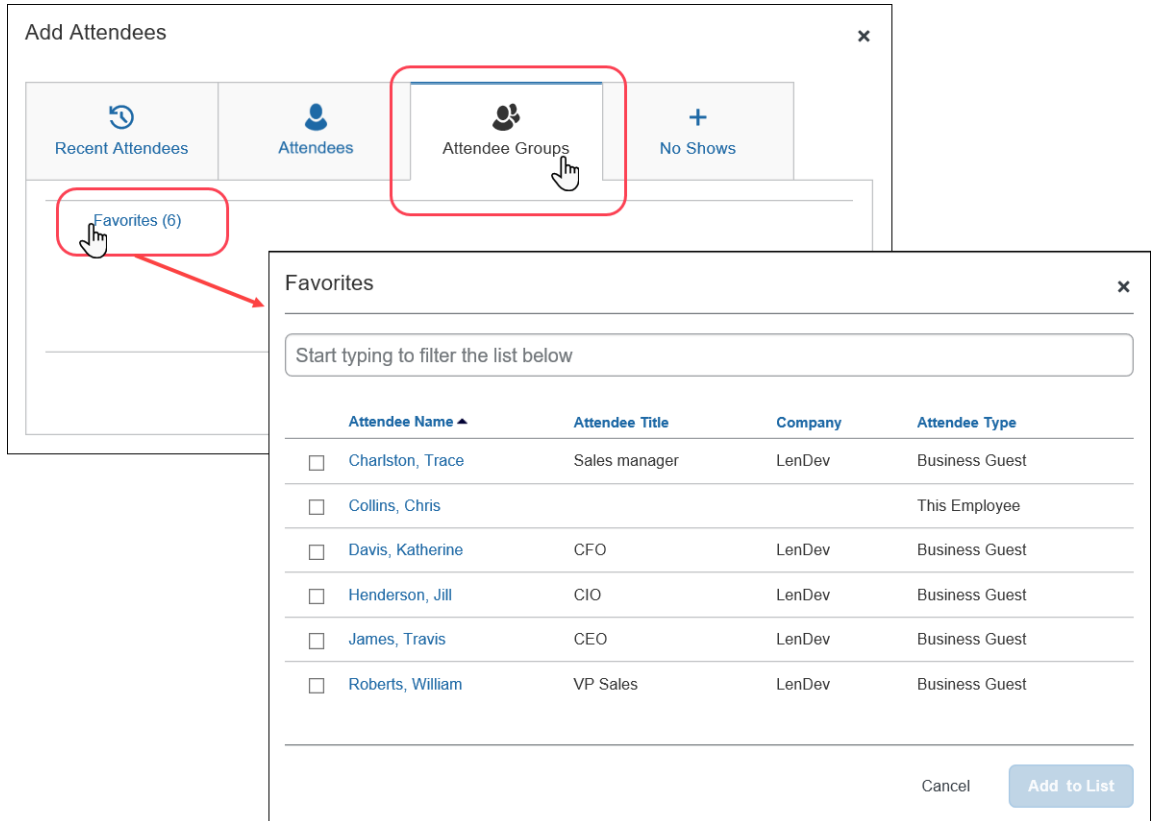
[Search All Attendee History](#)

**Add to List**

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 the tabs, a dropdown menu shows 'Favorites (6)' selected, also highlighted with a red box. A red arrow points from this dropdown to the 'Favorites' dialog box. The 'Favorites' dialog contains a search bar and a table of attendees.

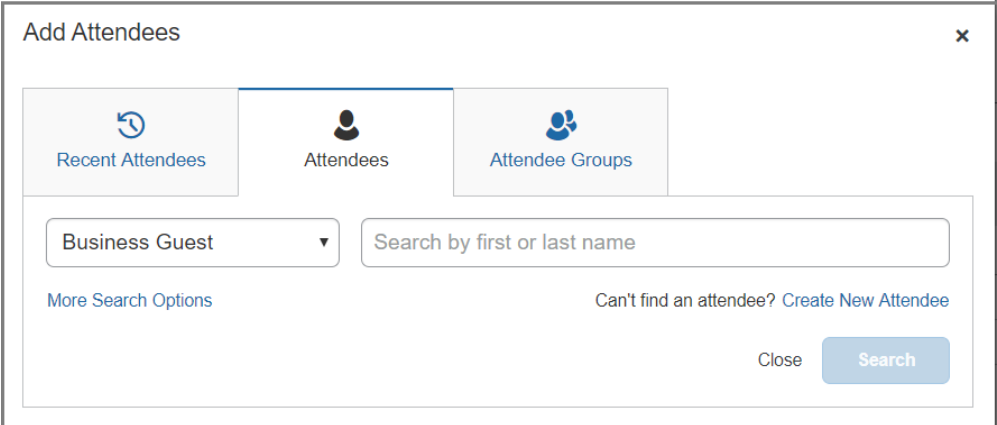
	Attendee Name	Attendee Title	Company	Attendee Type
<input type="checkbox"/>	Charlston, Trace	Sales manager	LenDev	Business Guest
<input type="checkbox"/>	Collins, Chris			This Employee
<input type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest
<input type="checkbox"/>	Henderson, Jill	CIO	LenDev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

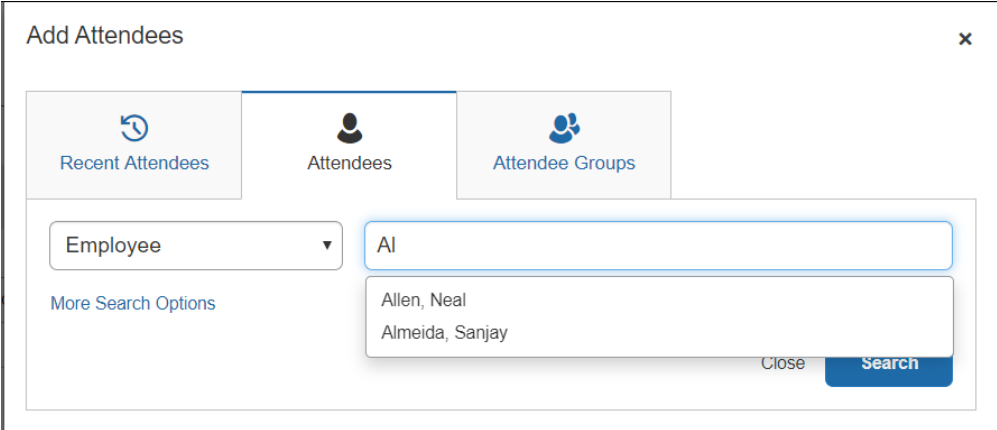
In the following example, assume that you want to add an attendee who is not available on the **Recent Attendees** tab or in Favorites. The first step is to search for the desired attendee.

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



The screenshot shows the 'Add Attendees' dialog box with three tabs: 'Recent Attendees', 'Attendees', and 'Attendee Groups'. The 'Attendees' tab is 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.

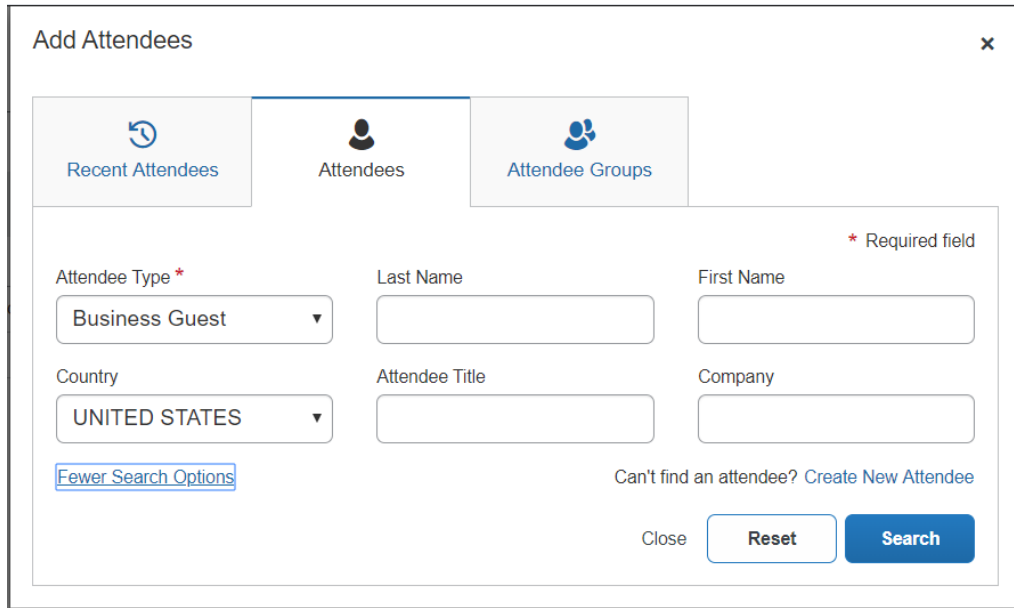
You can type characters in the search field to search for an attendee and the results will appear in the list.



This screenshot shows the same 'Add Attendees' dialog box, but with the dropdown menu set to 'Employee' and the search field containing 'AI'. A dropdown list of search results is visible below the search field, listing 'Allen, Neal' and 'Almeida, Sanjay'. The 'Search' button is now highlighted in blue, indicating it has been clicked.



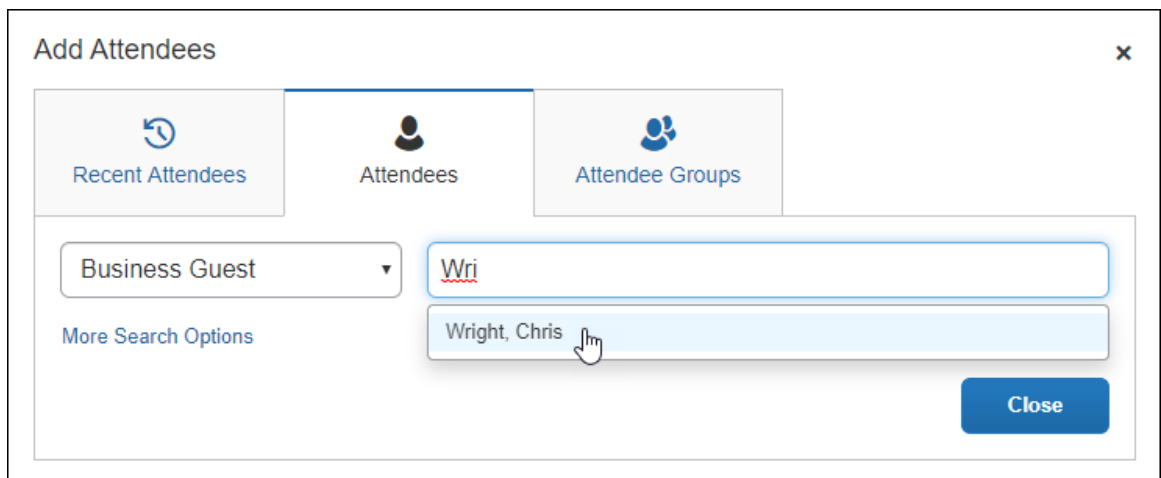
You can click on **More Search Options** to enter additional criteria using the advanced search fields.



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

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 active. The 'Attendee Type' dropdown is set to 'Business Guest'. The 'Last Name' field contains 'Wri', and a dropdown menu is open showing a search result 'Wright, Chris' with a mouse cursor pointing to it. There is a link for 'More Search Options' and a 'Close' button at the bottom right.

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

\* Required field

First Name

Attendee Title

Company

State

Total Amount YTD

[Fewer Search Options](#)

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

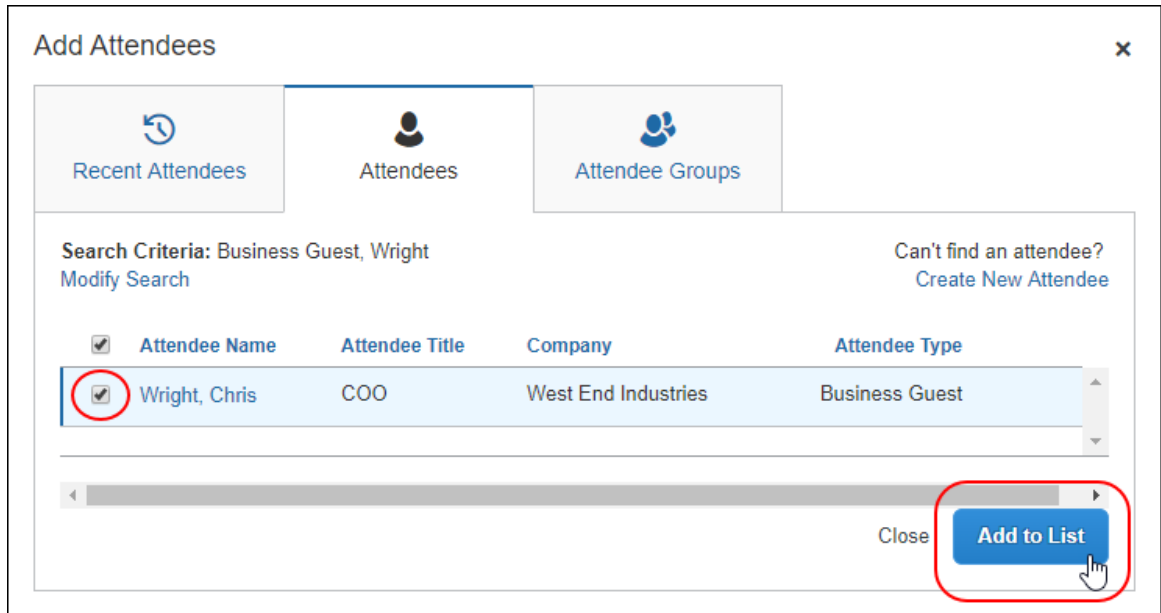
Close

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 the 'Add Attendees' dialog box with the 'Attendees' tab selected. The search criteria are 'Business Guest, Wright'. A table of results is displayed with the following columns: Attendee Name, Attendee Title, Company, and Attendee Type. The first row is 'Wright, Chris', COO, West End Industries, Business Guest. The checkbox for this row is checked and circled in red. At the bottom right, the 'Add to List' button is also circled in red.

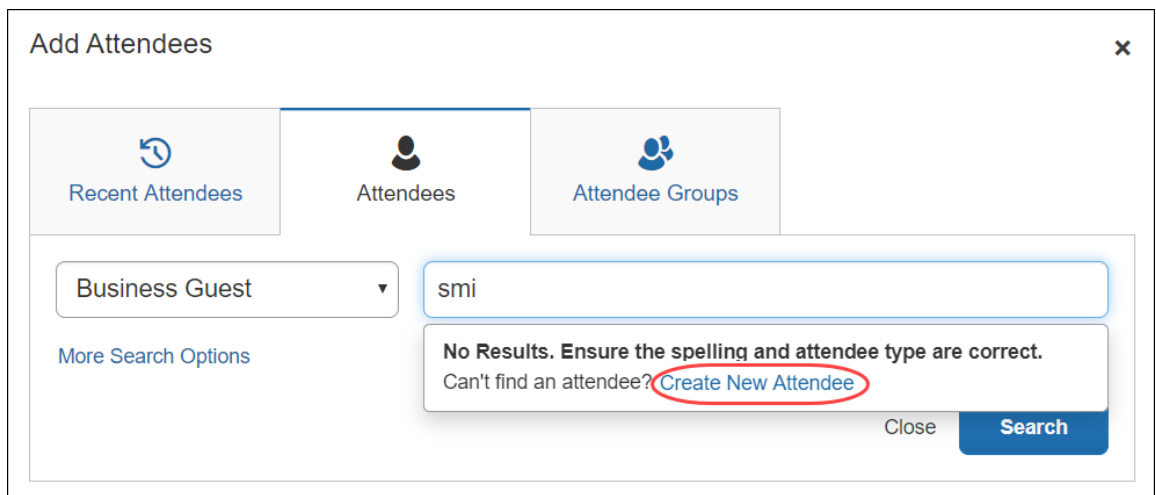
<input checked="" type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type
<input checked="" type="checkbox"/>	Wright, Chris	COO	West End Industries	Business Guest

**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

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.



The screenshot shows the 'Add Attendees' dialog box with the 'Attendees' tab selected. The search criteria are 'Business Guest' and 'smi'. A message box is displayed with the text: 'No Results. Ensure the spelling and attendee type are correct. Can't find an attendee? Create New Attendee'. The 'Create New Attendee' link is circled in red.

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

### Add Attendees

Recent Attendees | **Attendees** | Attendee Groups

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

\* Required field

Attendee Type \*  Last Name  First Name   
Attendee Title  Company

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

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

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

### Search For Attendee

**Search Criteria:** Business Guest, Smith [Can't find an attendee? Create New Attendee](#)  
[Modify Search](#)

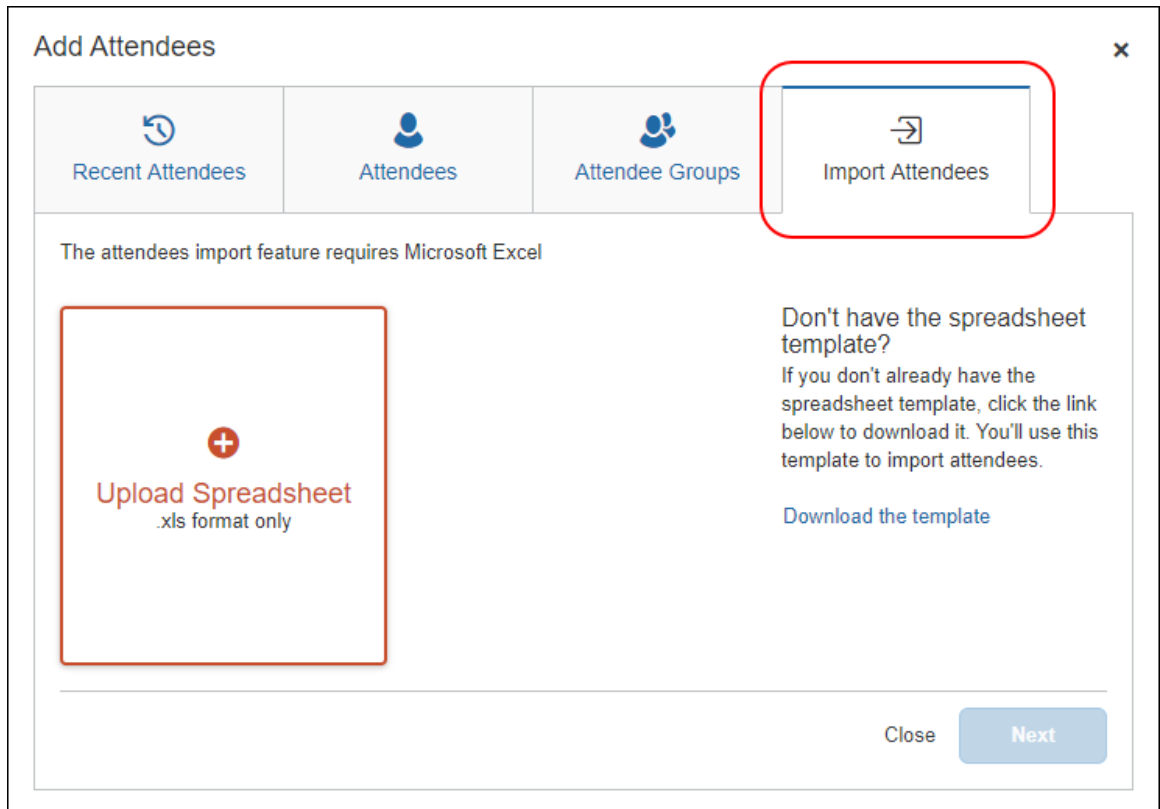
Attendee Name ▲	Attendee Title	Company	Attendee Type
<input type="checkbox"/> Smitha, X			Business Guest

[Close](#) [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.

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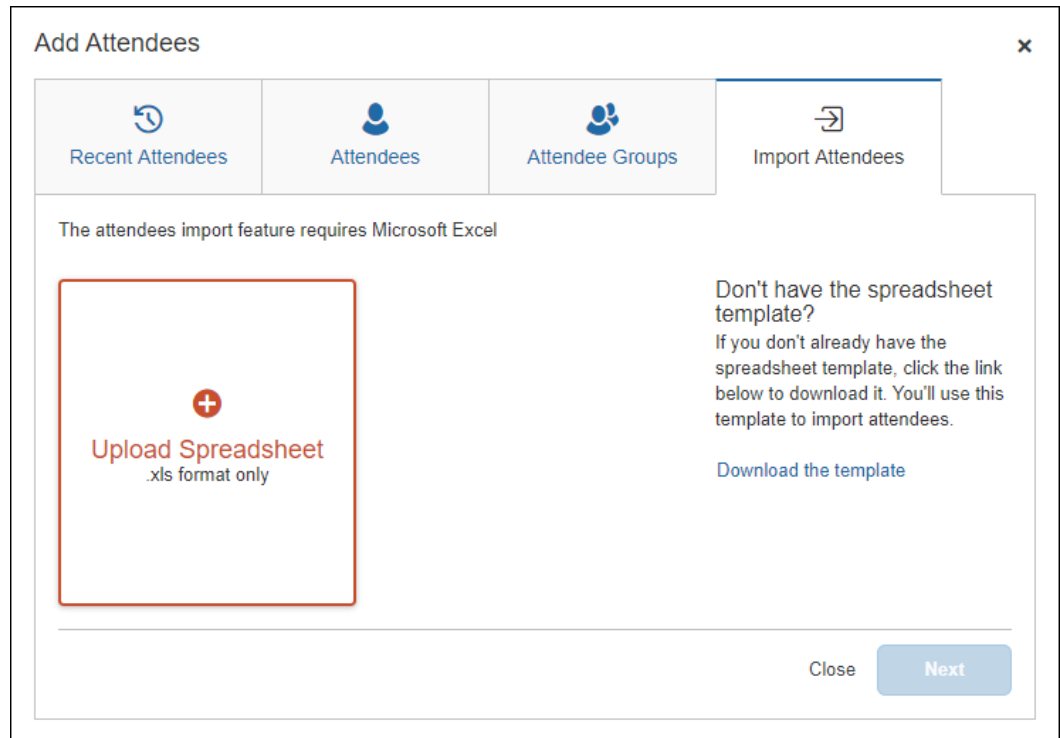
**NOTE:** The **Attendees** link appears only for Hospitality Expense Type

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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.

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

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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**.

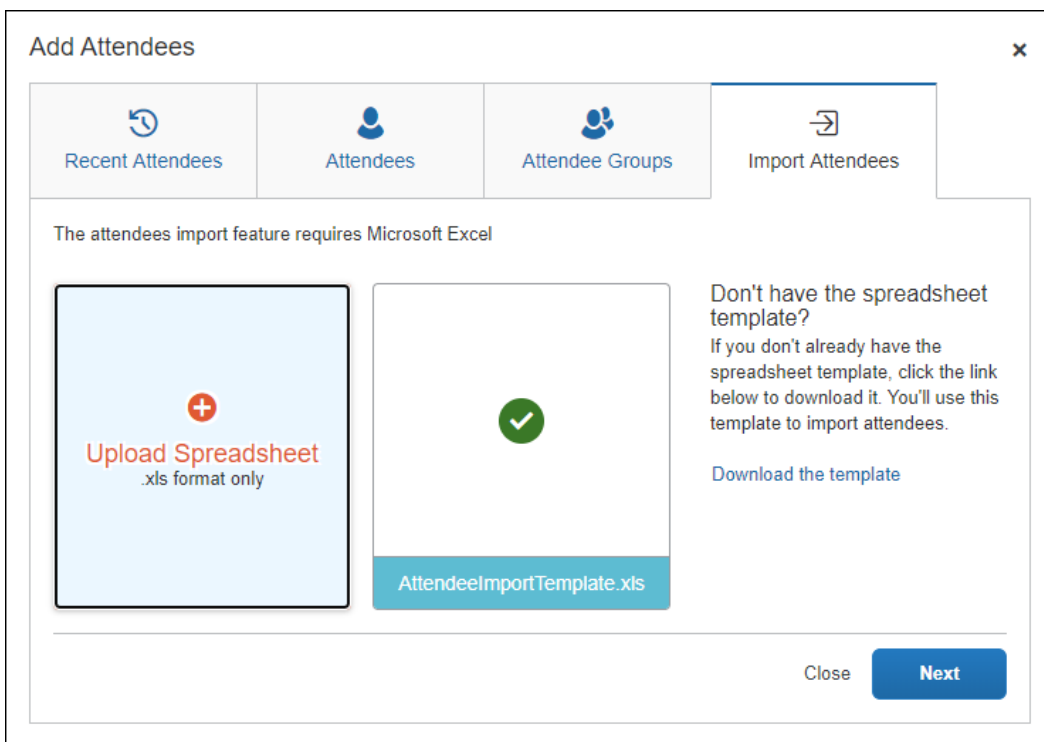
5. If you need to create an Excel spreadsheet using the attendee import template, click **Download the template**.

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](#)

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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			

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[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](#)

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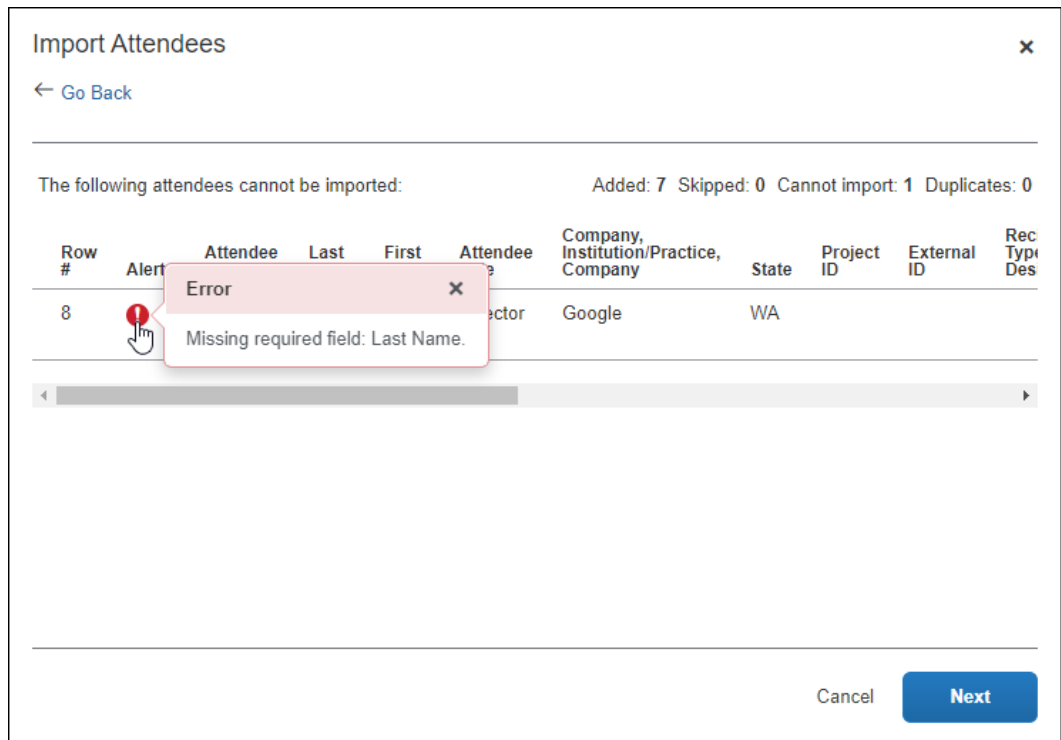
The following attendees cannot be imported: Added: 1 Skipped: 6 Cannot import: 1 Duplicates: 0

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			

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[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**.

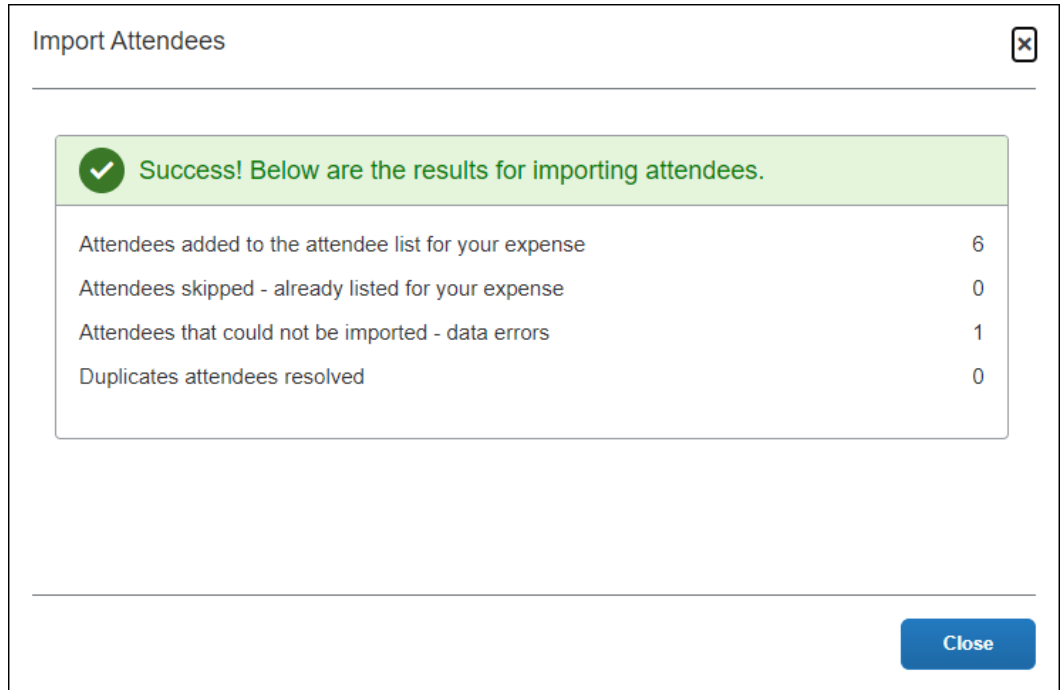
If the possible duplicate (from the spreadsheet) is not an existing attendee, click **Continue Adding New Attendee**.

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.

## 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.

