

Concur Invoice: Attendees

Setup Guide

Last Revised: September 20, 2022

Applies to these SAP Concur solutions:

- ☐ Concur Expense
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Concur Travel
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☒ Concur Invoice
 - ☒ Professional/Premium edition
 - ☐ Standard edition
- ☐ Concur Request
 - ☐ Professional/Premium edition
 - ☐ Standard edition

Table of Contents

Section 1: Permissions	1
Section 2: Overview	1
Attendees Differences in Concur Invoice and Concur Expense	2
Optional (Configurable) Attendee Features	4
General Configuration Options	4
Settings for Attendee Type	4
Settings for Policy and Expense Type	4
Features Specific to Invoice Groups	5
Section 3: End-User Experience.....	5
Search for an Attendee	6
Search by All Available Employees at a Company	8
Edit or View Payment Request Attendee Details	9
Edit or View Amounts	10
View Amounts.....	10
Change Amounts.....	11
Understand How Concur Invoice Distributes and Redistributes Amounts	12
Create a New Attendee	12
Remove an Attendee from an Expense.....	14
Account for "No Shows"	14
Enter a Count for Unnamed Attendees	15
View Exceptions	16
Additional Attendee Information: Payment Request Attendee Detail View	18
Change Columns	18
Example: Add a Field	19
Affected Pages	20
Section 4: Delegates, Proxies, Approvers, and Processors	20
Delegates and Proxies.....	20
Approvers and Processors	20
Section 5: Configuration Overview and Procedures.....	21
Different Processes for Different Options	21
The Basic Configuration Process	23
Step 1: Define the Attendee Forms and Fields.....	23
Overview: Attendee Forms and Fields	23
Configure Attendee Forms and Fields	29
Step 2: Configure the Payment Request Attendee Detail View.....	34
Overview: Payment Request Attendee Detail View	34
Configure the View	34

Step 3: Add the Attendees field to the Payment Request Line Item Details Form	38
Step 4: Edit the Attendee-Related Expense Types	39
Overview: Understand Attendee Count Configuration.....	39
Move the Attendee Count Column for Visibility	40
Edit Expense Types	41
Overview: Restrict Attendee Types by Expense Type	43
Filter Attendee Types for Expense Types by Exclusion	44
Set the Default Attendee Type for an Expense Type.....	45
Overview: Suppress the New Attendee Button by Expense Type	46
Procedure: Suppress the New Attendee Button by Expense Type.....	46
Step 5: Add Attendee Types and Work with Other Attendee Settings	47
Overview: Attendee Types.....	47
Procedure: Configuring Attendee Types.....	48
Overview: Settings.....	52
Procedure: Configure Settings	54
Overview: Attendee Types by User Groups.....	57
Procedure: Configure Attendee Types by User Groups.....	57
Step 6: Include All Employees in a Company in the Attendee Search	58
Procedure: Part 1 – Confirm Auto-Create Attendee Record is Enabled	58
Procedure: Part 2 – Attendee Types and Employee Attendee Records	59
Procedure: Part 3a – Inactivate the Employee Attendee Type if All Employees Are Concur Users.....	60
Procedure: Part 3b – Add a New Attendee Type	61
Procedure: Part 4 – Configure SYSEMP Attendee Type	62
IMPORTANT: SYSEMP with Non-Employees.....	64
Step 7: Create Attendee Audit Rules.....	67
Step 8: Import a List of Attendees.....	68
IMPORTANT! Use the Attendee Import on an Existing System	68
External ID Required for Imported Changes and Deletions.....	69
Section 6: Retaining Attendee History with Associated Expense Entry	70
Overview.....	70
Section 7: Implementing Attendee Import on Existing System - Tips and Hints.....	70
Change from a User-Entered List to a Managed List of Attendees	70
Change Employees as Attendees to a Managed List of Attendees.....	71

Revision History

Date	Notes/Comments/Changes
September 20, 2022	Minor edits throughout; cover date not updated
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
February 17, 2021	Updated the copyright year; no other changes; cover date not updated
April 17, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 6, 2020	Updated the copyright; no other changes; cover date not updated
June 20, 2019	Updated note about attendee search limitations in the <i>Search for an Attendee</i> section.
June 10, 2019	Added information about attendee search result limitations.
April 13, 2019	Changed the term "payment request" to "invoice" as part of the new user experience for Concur Invoice including images.
February 9, 2019	Change the term "Concur" to "SAP Concur" and the term "payment request" to "invoice" where applicable; no other content changes.
January 29, 2019	Updated the copyright; no other changes; cover date not updated
April 6, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 10 2018	Updated the copyright; no other changes; cover date not updated
December 14 2016	Changed copyright and cover; no other content changes.
December 5 2016	Updated the <i>Permissions</i> section and guide content to new corporate style; no content changes.
February 24 2016	Included note about attendees not being available for purchase requests.
January 15 2016	New guide.

Attendees

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view but not create or edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's Concur administrator.

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP Concur staff. In this case, the client must initiate a service request with SAP Concur support.

Section 2: Overview

For some expense types, such as catering or trade show, Invoice users may be required – sometimes for corporate reasons; sometimes for legal reasons – to identify all attendees associated with that expense. In some cases, each individual attendee must be listed. In other cases, it may be acceptable for the user to simply enter a count (number of unnamed attendees).

This guide describes how Invoice users, approvers, delegates, and proxies use the Attendees feature. It also describes how the administrator configures the feature.

NOTE: The Attendees feature is available to clients who use both Concur Expense and Concur Invoice. It is not available to clients who use Concur Invoice only. A Concur Expense or Concur Invoice user can add, edit, view, and remove attendees. The Attendee tool is located in the **Administration > Expense** section for both Concur Expense and Concur Invoice admins. This means that the admin who configures attendees for Concur Invoice must have the Concur Expense Configuration Administration role to access and configure part of the Attendees feature. The same applies to accessing the Attendee Admin tool to work with attendees. (**Administration > Company > Tools > Attendee Admin.**)

NOTE: The Attendee feature is only available for invoices, not purchase requests.

Attendees Differences in Concur Invoice and Concur Expense

Concur Invoice comes complete with a fully functioning Attendee feature. However, there are some differences in functionality between attendees in Concur Invoice and Concur Expense, for example, the set-up process of how the admin enables attendees, and some of the options in **Administration > Expense > Settings** do not apply to Concur Invoice. The following table shows a comparison in attendee functionality between Concur Invoice and Concur Expense.

Attendee Functionality	Invoice Professional	Expense Standard	Expense Professional
Company can add new attendee types	✓		✓
iPad user interface (and other mobile devices)	✓	✓	✓
Attendee forms and fields:			
Predefined	✓	✓	✓
Configurable	✓		✓
Able to display attendee totals <i>across</i> Expense and Invoice	✓		✓
Attendees sourced from:			
User entry	✓	✓	✓
Company import of flat file via batch	✓		✓
Web service connector to maintain attendee list	✓		✓
Web service connector to partners – attendee fetch	✓	✓	✓
Web service custom connector to 3 rd party or company source	✓	✓	✓
Concur Expense with attendees can be pushed from:			
CRM partners via web service connector	✓	✓	✓
Web service custom connector to 3 rd party or company source	✓	✓	✓
Company can limit attendee types by:			
Group	✓		✓
Expense Type	✓		✓
Company can configure audit rules:			
Using attendee information and attendee totals	✓		✓

Attendee Functionality	Invoice Professional	Expense Standard	Expense Professional
Using attendee totals within <i>either</i> Concur Expense or Concur Invoice	✓		✓
Using attendee totals <i>across</i> Concur Expense and Concur Invoice	N/A		N/A
Breaking down attendee totals by expense type			✓
User can:			
Create and use favorites and favorite groups		✓	✓
Add from a list of recent attendees	✓	✓	✓
Import via Excel spreadsheet		✓	✓
Add a group of favorite attendees		✓	✓
Add attendee via email		✓	✓
Edit amount per attendee ¹	✓	✓	✓
Edit count per attendee ²	✓	✓	✓
Enter "No Shows" ³	✓		✓
Aggregate Spend Data out via:			
Analysis reports – save in formats such as Excel and CSV ⁴		✓	✓
Extract scheduled flat file	✓		✓
Web service connector to partners	✓	✓	✓
Web service custom connector to 3 rd party or company source		✓	✓

¹ Typically used to track items for demonstrating properties of drug or device, such as models or posters, when there is a need to track the value of different items in the same entry.

² Used to enter a single attendee for staff and a count of those staff, as a data entry shortcut where names are not required. Sign-in sheets or other back-up data are still required for auditability in cases of dispute.

³ Primarily used in the case of larger pre-planned events to allow cost spread across all planned attendees with named tracking for those that actually attended.

⁴ Invoice Attendee-related standard reports are not available.

NOTE: For Concur Invoice only customers, configuration of Attendee Types is shared in Expense Admin. Therefore, admins must give an employee rights to Expense Admin in order to fully configure this feature. For more information, refer to *Step 4: Add Attendee Types and Work With Other Attendee Settings* in this guide.

Optional (Configurable) Attendee Features

There are many optional features that the admin can configure to enhance the user experience and to ensure that the company is able to gather the desired (and required) attendee information.

General Configuration Options

General configurable options include:

- 20 custom fields available specifically for attendees
- Ability to track year-to-date attendee totals

Settings for Attendee Type

- Settings specific to each *attendee type* to:
 - ◆ Make *all* employees in a company available within the attendee search function for selection and inclusion as an attendee
 - ◆ Have separate attendee forms for each attendee type
 - ◆ Allow attendee lists to be shared or private
 - ◆ Allow users to enter new attendees into Concur Invoice
 - ◆ Set the available attendee types for an expense type by excluding attendee types and only displaying the remaining attendee types
 - ◆ Set a default attendee type for an expense type
 - ◆ Allow users to enter the count (number of unnamed attendees) instead of having to identify and enter each individually for a defined attendee type (used in conjunction with the similarly named *expense type/policy* setting)
 - ◆ Have Concur Invoice check for duplicate records when users add new attendees to Invoice
 - ◆ Define the search criteria available in the **Attendees** section of the **Edit Line Item** page

Settings for Policy and Expense Type

- Settings specific to each *policy and expense type* to:
 - ◆ Allow users to *view* the amount of the expense allotted to each attendee
 - ◆ Allow users to *edit* the amount of the expense allotted to each attendee
 - ◆ Allow users to account for attendees who were invited but did not attend ("no shows")

- ◆ Allow users to enter the count (number of attendees) instead of having to identify and enter each attendee individually for a defined expense type and policy (used in conjunction with the similarly named *attendee type* setting)
- ◆ Include the Concur Invoice user as an attendee *by default*
- ◆ Suppress the **Add New Attendee** button for an expense type

Features Specific to Invoice Groups

- Features specific to Concur Invoice groups:
 - ◆ List of attendee types available for Concur Invoice group
 - ◆ Configurable view of information in attendee lists (columns available for view)
 - ◆ Audit rules relating to attendee totals

Section 3: End-User Experience

This section describes the tasks the user can complete by using the **Edit Line Item** page.

When the user clicks a line item, the **Edit Line Item** page appears.

EDIT LINE ITEM

Expense Type: Catering | Line Description: Test | Quantity: 1 | Unit Price: 150 | Total: 150.00

[View Invoice](#)

[Distributions](#) | [Distribution Summary](#) | [Attendees](#)

Attendees | Attendees | Attendee Total: | Remaining: | No Shows: ☐

[New Attendee](#) | [Advanced Search](#) | [Remove](#)

Attendee Name	Attendee Title	Attendee Type	Total Amount ...	Total Amount ...	Middle Initial	* Last Name	Amount
Invoice, Owner		Employee	\$0.00	\$0.00		Invoice	\$0.00

In the **Attendee** tab on the **Edit Line Item** page, a user can:

- Add an existing attendee to an expense
- Search for an existing attendee
- Add any employee at their company
- Edit or view attendee information
- Edit or view amount (configurable)
- Create a new attendee (configurable)
- Remove an attendee from an expense
- Account for "no shows" (configurable)
- Enter a count (number of unnamed attendees; configurable)

On the **Payment Request List** page, the user can view exceptions that will appear, for example, if an attendee is required.

NOTE: The administrator can restrict – by attendee type – the attendees that a user can create, edit, view, or search for, as described in the configuration section in this guide.

This table below describes the columns and fields in the **Attendee** tab.

Field	Description
Attendee Name	Attendee's name
Title	Attendee's work title
Company	Attendee's company
Attendee Total	The total number of attendees
Attendee Count	Total count of attendees by this attendee type
Amount	The amount that is associated with the attendee for that line item
No Shows	Attendees who were invited but did not attend

Search for an Attendee

Users can search for existing attendees that they want to add to a line item to ensure that all relevant parties are associated to the invoice.

► To search for an attendee:

1. On the **Payment Request List** page, open the desired invoice.
2. Click on the desired line item. The **Edit Line Item** page appears.
3. Click the **Attendees** tab.

EDIT LINE ITEM

Expense Type
Catering

Line Description
Test

Quantity
1

Unit Price
150

Distributions
Distribution Summary
Attendees

Attendees

New Attendee
Advanced Search
Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Attendee Type	Total Amount ...	Total Amount ...	Middle Initial	* Last Name	Amount
<input type="checkbox"/>	Invoice, Owner		Employee	\$0.00	\$0.00		Invoice	\$0.00

4. Click the **Advanced Search** button.

EDIT LINE ITEM

Expense Type

Catering

Line Description

Test

Quantity

1

Unit Price

150

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Attendee Type	Total Amount ...	Total Amount ...	Middle Initial	* Last Name	Amount
<input type="checkbox"/>	Invoice, Owner		Employee	\$0.00	\$0.00		Invoice	\$0.00

5. In the **Search Attendees** window that appears, search on attendees by using detailed search criteria, such as attendee type, attendee title, and company, and then click **Search**. The results appear in the **Search Results** section.

NOTE: When searching for attendees in Concur Invoice, the search results has a limit of approximately 5,000 attendees, so the search results will be limited to the first 5,000 attendees returned by the search.

If you are searching an external source for attendees using the Fetch Attendee Web Service, the attendee search results for the Fetch Attendee Web Service has a limit of 100 attendees. In this scenario, the search results will be limited to the first 100 attendees returned by the search. For more information, refer to *Fetch Attendee Web Service* on <http://developer.concur.com>.

SEARCH ATTENDEES

Search Attendees

Attendee Type

Associate

Attendee Title

Company

Reset

Search

Search Results

<input type="checkbox"/>	Attendee Name	Attendee Title	Attendee Type	Total Amount ...	Total Amount ...	Middle Initial	Last Name
No data to display							

Page 1 of 1

Cancel

New Attendee

Add to Item

6. Select the desired attendee(s) and click **Add to Item**. If the system only returns a single attendee, Concur Invoice automatically selects that attendee.

Search by All Available Employees at a Company

Clients can configure the system to search *all* employees at a company for selection and inclusion as an attendee (and simultaneous auto-create an attendee record for that employee). To configure this feature (if not already available at your site), refer to the *Include All Employees Available in an Attendee Search* section of this document.

Edit or View Payment Request Attendee Details

A user can edit attendee information *only* if the user originally added the attendee to Concur Invoice. Otherwise, the user can view—but not make any changes—to the attendee information.

In the **Attendees** section of the **Edit Line Item** page, the user clicks on the name of the desired attendee. The **Edit Attendee** window appears.

When done viewing or editing, the user clicks **Save**.

The following information may display (read-only) on this page:

- **Audit rule exception message:** If an audit rule exception has been generated for this attendee
- **Totals (including, but not limited to):**
 - ◆ Total amount YTD (total spend on this attendee by the entire company year-to-date)
 - ◆ Total Amount Previous Year (total spend on this attendee by the entire company last year)
 - ◆ Employee Amount YTD (total spend on this attendee by the current user year-to-date)
 - ◆ Employee Amount Previous Year (total spend on this attendee by the current user last year)

Note the following:

- ◆ This total per attendee will begin to aggregate at the point the option is configured; it will not retroactively include expenses submitted prior to its activation. However, for those importing managed lists of attendees, a starting year-to-date total may be imported when creating a new attendee record.



For more information about importing attendees, refer to the *Import a List of Attendees* section in this guide.

- Whether any or all these totals are visible to users is configurable, as described in the configuration portion of this guide.

Edit or View Amounts

View Amounts

Whether users can edit or view the amounts allotted to attendees are configurable, as described in the configuration section of this guide.

Attendees section without individual totals visible:

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count
<input type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest		1
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest		1
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest		1

Attendees section with read-only totals:

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count	Total Amount ...	Total Amount ...	Amount
<input type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest		1	\$0.00	\$0.00	\$35.00

Attendees section with editable totals:

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count	Total Amount ...	Total Amount ...	Amount
<input checked="" type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest		1	\$0.00	\$0.00	\$35.00

TIP: If you add more fields to this display, move the **Attendee Count** column to the left for easier viewing on laptop or netbook devices. Use the **Form Fields** tab (in the Forms and Fields tool) to do this.

Change Amounts

When users add attendees to an expense, the system automatically distributes the amount of the expense evenly across attendees.

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count	Total Amount ...	Total Amount ...	Amount
<input checked="" type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest		1	\$0.00	\$0.00	\$35.00

If the configuration allows the user to edit amounts, the user can click in the **Amount** column and change the value, if necessary.

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count	Total Amount ...	Total Amount ...	Amount
<input checked="" type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest		1	\$0.00	\$0.00	\$35.00

When the user clicks out of the **Amount** column, Concur Invoice redistributes the remaining portion of the expense evenly between the remaining attendees.

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count	Total Amount ...	Total Amount ...	Amount
<input checked="" type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$50.00
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$27.50
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest		1	\$0.00	\$0.00	\$27.50

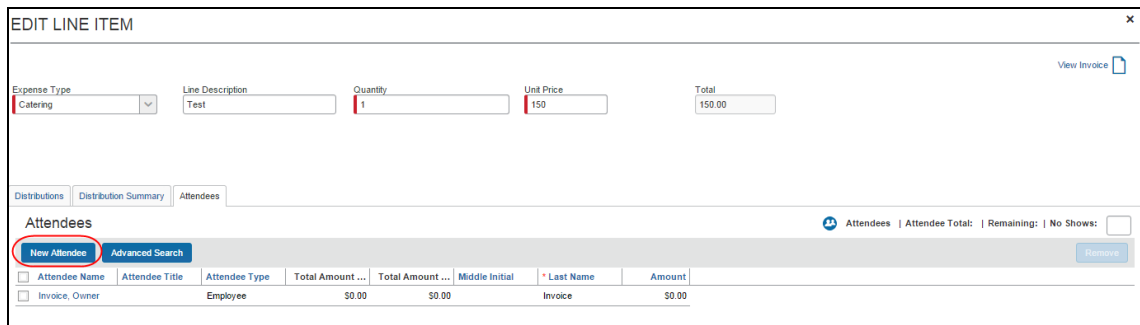
Understand How Concur Invoice Distributes and Redistributes Amounts

Keep the following in mind about changing amounts:

- Concur Invoice initially distributes the amount of the expense equally across attendees. That is, if the expense amount is 100 USD and there are two attendees, Concur Invoice allots 50 to each attendee.
- If a user adds or removes an attendee, Concur Invoice redistributes the amounts. In the above example, if the user removes one attendee, then the remaining attendee is allotted the full 100. If the user adds another attendee (so now there are two again), Invoice redistributes again, allotting 50 to each.
- *If the user changes an amount manually, Concur Invoice will not change that amount later while redistributing.*
 - ♦ Assume that the user edited the amount of attendee A to be 30 and the user let Concur Invoice automatically adjust attendee B's amount to be 70. If the user now adds attendee C, Concur Invoice will redistribute 70 across attendee B and C; Concur Invoice will not change attendee A, which remains at 30.
 - ♦ Assume that the user edited the amount of attendee A to be 30 and *manually changed* attendee B's amount to be 70. If the user now adds attendee C, Concur Invoice allots zero to attendee C. The user must manually adjust amounts to account for attendee C. Concur Invoice will not automatically change the amount for attendee A or B.
- Users cannot edit amounts for expenses marked as personal or the "parent" portion of an itemized expense.

Create a New Attendee

The user can create an attendee by using the **New Attendee** button.



The screenshot shows the 'EDIT LINE ITEM' window. At the top, there are fields for 'Expense Type' (Catering), 'Line Description' (Test), 'Quantity' (1), 'Unit Price' (150), and 'Total' (150.00). Below these fields are tabs for 'Distributions', 'Distribution Summary', and 'Attendees'. The 'Attendees' tab is active, showing a table with columns: 'Attendee Name', 'Attendee Title', 'Attendee Type', 'Total Amount ...', 'Total Amount ...', 'Middle Initial', 'Last Name', and 'Amount'. The table contains one row: 'Invoice, Owner', 'Employee', '\$0.00', '\$0.00', 'Invoice', '\$0.00'. Above the table, there are buttons for 'New Attendee' (highlighted with a red circle) and 'Advanced Search'. To the right of the table is a 'Remove' button. At the top right of the window is a 'View Invoice' button.

The **Add Attendee** window appears.

The screenshot shows a web-based form titled "Add Attendee". The form contains the following fields:

- Attendee Type:** A dropdown menu with "Associate" selected.
- Last Name:** A text input field.
- First Name:** A text input field.
- Attendee Title:** A text input field.
- Company:** A text input field.

At the bottom right of the form, there are three buttons: "Cancel", "Save & Add Another", and "Save".

The user selects the desired type from the **Attendee Type** list. The page refreshes with the appropriate fields for the selected attendee type.

The user completes the remaining fields and clicks either **Save** or **Save & Add Another**.

Concur Invoice then checks for duplicate attendees. If it finds one or more potential duplicates, the user is prompted to use the existing attendee information (if the attendee that the user is adding and the duplicate are, in fact, the same person) or to continue adding the attendee (if the attendee that the user is adding and the duplicate are *not* the same person).

Concur Invoice adds the new attendee to the expense.

Note the following:

- The user can change the *Attendee Type* value for an attendee added to an invoice up to the point at which the invoice is submitted, after which this value is locked down by the system.
- Whether users can add new attendees is configurable, as described in the configuration section of this guide.
- The attendee duplicate type check by default is limited to attendees of the same type. However, the admin can expand this check to all attendee types on the **Settings** tab of the **Attendees** page in **Expense Admin**.
- By default, the **New Attendee** button appears to the user. The administrator can suppress this button in the **Attendees** tool to prevent a user from adding

an attendee—forcing the user to search for the attendee first, ensuring the attendee is not already in the system.

NOTE: This change affects only the **Attendees** section of the **Attendee** tab.

Remove an Attendee from an Expense

The user selects the check box of the desired attendee, and then clicks **Remove**. Concur Invoice removes the attendee from the expense.

Amounts are redistributed, as described in the *Understand How Expense Distributes and Redistributes Amounts* section in this guide.

Account for "No Shows"

A user can account for *No Show* attendees. For example, assume that an event was planned for three attendees, prepaid for 105 USD, which means each of the attendees would be allotted an amount of 35 USD. Now assume that one of the attendees cancelled at the last minute so only two attendees were present. By default, each attendee would be allotted an amount of 52.50 USD. By using the No Show feature, the user can indicate that one attendee was a no show so that other attendees reflect the correct amount of 26.50 USD each.

Totals when *not* accounting for "no shows":

Attendees: 3 | Attendee Total: \$105.00 | Remaining: \$0.00 | No Shows: 0 | \$0.00

Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count	Total Amount ...	Total Amount ...	Amount
<input type="checkbox"/> Wong, Tom	Senior Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00
<input type="checkbox"/> Johnson, Bill	Manager	Convex	Business Guest		1	\$0.00	\$0.00	\$35.00
<input checked="" type="checkbox"/> Lee, Sandra	HR Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$35.00

Totals when accounting for "no shows":

Attendees: 4 | Attendee Total: \$105.00 | Remaining: \$0.00 | No Shows: 1 | \$25.50

Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count	Total Amount ...	Total Amount ...	Amount
<input type="checkbox"/> Wong, Tom	Senior Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$26.50
<input type="checkbox"/> Johnson, Bill	Manager	Convex	Business Guest		1	\$0.00	\$0.00	\$26.50
<input type="checkbox"/> Lee, Sandra	HR Manager	Brooks Dev	Business Guest		1	\$0.00	\$0.00	\$26.50

The remaining 25.50 USD is *not* allotted to the absent attendee and does not affect the absent attendee's annual totals.

The No Show feature is not available for expenses marked as personal or the "parent" portion of an itemized expense.

NOTE: Whether users can use the No Show feature is configurable, as described in configuration section of this guide.

Enter a Count for Unnamed Attendees

In some cases, it is acceptable for the user to enter a count – number of unnamed attendees – instead of listing each attendee individually. For example, assume that the user purchased a gift for a doctor and a "group" gift for the employees in the doctor's office.

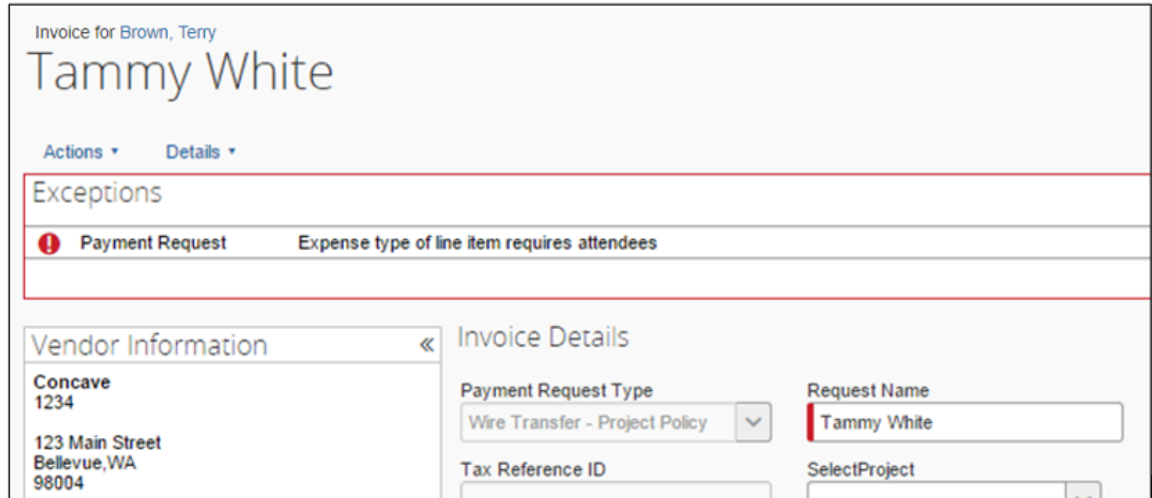
Attendees

Attendee Name	Attendee Title	Company	Attendee Type	State	Attendee Count	Total Amount ...	Total Amount ...	Amount
<input checked="" type="checkbox"/> Staff		Brooks Dev	Business Guest		10	\$0.00	\$0.00	\$95.43
<input type="checkbox"/> Henry, Dr. Fran...	MD	Eastside Clinic	Business Guest		1	\$0.00	\$0.00	\$9.57

NOTE: Whether users can enter "counts" instead of entering all attendees individually is defined by expense type/policy and attendee type, as described in the configuration section of this guide.

View Exceptions

The **Invoice for <name>** page displays all exceptions including attendee related exceptions, for example, if an attendee is required.



Invoice for Brown, Terry

Tammy White

Actions ▾ Details ▾

Exceptions

! **Payment Request** Expense type of line item requires attendees

Vendor Information <<

Concave
1234
123 Main Street
Bellevue, WA
98004

Invoice Details

Payment Request Type: Wire Transfer - Project Policy ▾

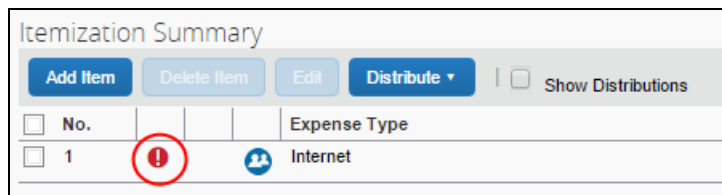
Request Name: Tammy White

Tax Reference ID:

SelectProject:

If the admin has created an audit rule that contains attendee totals for quarter/year, the approver may view an exception condition applied to a specific attendee. These exceptions appear in the following places:

- As an icon next to the check box in the **Itemization Summary** section of the **Invoice for <name>** page



Itemization Summary

Add Item Delete Item Edit Distribute ▾ ☐ Show Distributions

<input type="checkbox"/>	No.		Expense Type
<input type="checkbox"/>	1	!	Internet

- As an icon next to the check box (if visible) in the **Search Results** section of **Advanced Search** window

SEARCH ATTENDEES

Search Attendees

Recently Used

Attendee Type
Business Guest

Last Name
last

Total Amount YTD

Search Results

☒ Attendee Name

☒ Last, TestS1

- As an icon next to the check box (if visible) in the **Attendees** section of **Edit Line Item** window

Distributions
Distribution Summary
Attendees

Attendees

New Attendee
Advanced Search
Remove

<input checked="" type="checkbox"/>	Attendee Name	Attendee Title	Company	* Attendee Type
<input checked="" type="checkbox"/>	Last, TestS1			Business Guest

- As a message in the **Edit Attendee** window

The screenshot shows the 'Edit Attendee' window with a red circle highlighting an error message at the top: "Attendee Total exceed the 1000 USD limit for the quarter (2015-10-01 to 2015-12-31)". Below the message, there are several input fields: 'Attendee Type' (set to 'Business Guest'), 'Last Name' (set to 'Last'), 'First Name' (set to 'TestS1'), 'Attendee Title', 'Company', 'State', 'Total Amount YTD' (0.00), 'Total Amount Previous Year' (0.00), 'Employee Amount YTD', and 'Project ID'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Additional Attendee Information: Payment Request Attendee Detail View

Change Columns

There are several places in Concur Invoice where attendee information is presented in tables, such as the **Attendees** section of the **Attendee** tab (as shown in the figure below).

The screenshot shows the 'Attendees' section in the 'Attendee' tab. It includes a table with the following data:

Attendee Name	Attendee Title	Company	Attendee Type	Attendee Count	Total Amount ...	Total Amount ...	State	Amount
Lee, Sammy	Senior Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$35.00
Wong, Tom	Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$35.00
Mason, Sandra	HR Manager	Convex	Business Guest	1	\$0.00	\$0.00		\$35.00

By default, the information that the user sees in these tables includes the attendee name, type, company, and attendee title. The administrator can customize this information and add any of the following:

- First Name
- Last Name
- Middle Initial
- Suffix

- Custom 1-20
- Attendee Entry Custom 1-5
- Total Amount Previous Year
- Total Amount YTD
- Attendee Count
- Status (used primarily with the Fringe Benefit Tax feature in Australia and New Zealand)



For more information, refer to the *Concur Expense: Fringe Benefits Tax (FBT) Setup Guide*.

Once the admin has created the new "view" configuration, they implement it by assigning it to one or more Concur Invoice groups.

Example: Add a Field

For example, by default, the **Attendees** section of the **Attendee** tab contains the **Attendee Name**, **Attendee Title**, **Company**, and **Attendee Type** columns. (Visibility of the **Amount** column is configurable.)

Distributions

Distribution Summary

Attendees

Attendees

Attendees: 3 | Attendee Total: \$105.00

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Attendee Count	Total Amount ...	Total Amount ...	State	Amount
<input type="checkbox"/>	Lee, Sammy	Senior Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$35.00
<input type="checkbox"/>	Wong, Tom	Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$35.00
<input type="checkbox"/>	Mason, Sandra	HR Manager	Convex	Business Guest	1	\$0.00	\$0.00		\$35.00

Assume that a company is in the pharmaceutical industry where it is important for the user to know the state in which the attendee (doctor) practices. Further, assume that the administrator added a custom field (renamed **State**) to the attendee form. Using the Payment Request Attendee Detail View feature, the administrator can also easily add that same field to this display.

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Attendee Count	Total Amount ...	Total Amount ...	State	Amount
<input type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$35.00
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$35.00
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest	1	\$0.00	\$0.00		\$35.00

Affected Pages

This column change affects the most common attendee grids, so when the administrator adds or removes a column, the change appears in these places:

- **Attendees** section of the **Attendee** tab (shown above)
- **Search Attendees** window which is accessed by clicking **Advanced Search** in the **Attendees** section of the **Attendee** tab



For more information, refer to the *Configure the Payment Request Attendee Detail View* section in this guide.

Section 4: Delegates, Proxies, Approvers, and Processors

Delegates and Proxies

All features described here for Concur Invoice users are also available to delegates and proxies.

Approvers and Processors

NOTE: Before reading this section, review the *Understand How Invoice Distributes and Redistributes Amounts* section in this guide to understand the relationship between manual changes to amounts and the automatic redistribution of amounts among attendees in Concur Invoice.

The admin can configure the attendee forms and fields (as with most forms and fields) so that they are read-only or editable (modifiable) for the approver and/or processor. If so, *modifiable* means:

- The approver and/or processor can add attendees to and remove attendees from an expense.
- Neither the approver nor the processor can *manually* adjust the amount of the expense allotted to each attendee. However, if the approver or the processor lowers the total amount of the expense, then Concur Invoice adjusts the individual attendee-allotted amounts proportionally.
- If the approver and/or processor add or remove an attendee *and*:
 - ♦ *If the user has not changed any amounts manually*, then Concur Invoice will automatically redistribute the amounts equally among all attendees.
 - ♦ *If the user changed some but not all amounts manually*, then Concur Invoice will redistribute the amounts over the attendees whose amounts the user *did not* change as well as any new attendees added by the approver or processor.
 - ♦ *If the user changed all amounts manually*, then Concur Invoice cannot redistribute the amounts. On save, an exception is created because the amounts no longer balance. Though the approver/processor is encouraged to return the invoice to the employee for editing, the invoice can be approved/processed.

Section 5: Configuration Overview and Procedures

To configure the Attendee feature for Concur Invoice, admins must have both the Expense Configuration Administrator role and Invoice Configuration Administrator role.

Different Processes for Different Options

Clients who want to take advantage of the extended attendee functionality may opt in to the following features. Concur Invoice applies the optional features in these ways:

- **Global:** Applies to all expenses that require attendees
- **By attendee type:** Set based on the attendee type
- **By expense type within the policy:** Set based on the expense type and policy, using the **Expense Types** page
- **By Group:** Configured and then applied to one or more Concur Invoice groups

Some of the attendee features are listed in the table below and are described *in detail* on the following pages.

Configured by Feature	Global	Attendee Type	Expense Types	Group
20 custom fields available specifically for attendees	X			
Ability to track year-to-date attendee totals	X			
Separate attendee forms for each attendee type		X		
Allow attendee lists to be shared or private		X		
Allow or prevent users to enter new attendees in Concur Invoice		X		
Have Concur Invoice check for duplicates when users add new attendees to Invoice		X		
Duplicate checks are performed across all attendee types	X			
Define attendee search criteria		X		
View the amount of an expense allotted to each attendee			X	
Edit the amount of an expense allotted to each attendee			X	
Account for attendees who were invited but did not attend ("no shows")			X	
Include the Concur Invoice user as an attendee by default			X	
Suppress the Add New Attendee button by expense type			X	
Set a default attendee type for an expense type			X	
Allow only some attendee types to be chosen for an expense type by excluding all others			X	
Allow users to enter the count (number of unnamed attendees)		X	X	
Import of attendee lists by administrator from other applications	X			
Allow the automatic creation of an attendee record for the current employee (SYSEMP attendee type)	X			
Create audit rules relating to attendee totals				X

Configured by Feature	Global	Attendee Type	Expense Types	Group
Auto-generate the External ID, used if importing lists of attendees	X			
Configure the Payment Request Attendee Detail View form				X
Search for and import attendees from external source NOTE: This option requires the Fetch Attendee web service. Refer to the <i>Fetch Attendee Web Service</i> information on http://developer.concur.com .		X		

The Basic Configuration Process

The configuration steps are described *briefly* here, and *in detail* on the following pages:

Step 1: Define the attendee forms and fields

Step 2: (Optional) Configure the *Payment Request Attendee Detail View* form

Step 3: Add the **Attendees** field to the *Payment Request Line Item Details* form

Step 4: Edit the attendee-related expense types

Step 5: Add attendee types and work with other attendee settings

Step 6: Include all employees in a company in the attendee search

Step 7: (Optional) Create attendee audit rules

Step 7: (Optional) Import list of attendees

Step 1: Define the Attendee Forms and Fields

Overview: Attendee Forms and Fields

In this step, you configure one or more forms used for attendees. You can create as many attendee forms as necessary, for example, one for each attendee type if desired, or, for example, by company type by using the Health Care Professional (HCP) attendee form.

GENERAL NOTES ABOUT ATTENDEE FORMS

- Concur Invoice and Concur Expense share the attendee forms and admins can change the forms in either product.
- Concur Invoice provides a default attendee form. To create new forms, make a copy of the default form and then edit the copy.
- Concur Invoice also provides company-specific forms, such as the Health Care Professional (HCP) attendee form.
- An administrator can create as many attendee forms as needed.
- Attendees are associated at the line item level only.
- Attendee forms are administered in **Administration > Invoice > Forms and Fields**.
 - ◆ Once the admin selects the *Expense Attendee* form type, Concur Invoice displays the list of forms available. The admin can expand the forms to display the currently configured fields.
 - ◆ Use the *Payment Request Attendee Detail View* form type to provide additional information in the most common attendee grids (tables) as described in the *Additional Attendee Information – Payment Request Attendee Detail View* section in this guide.



For general information about forms and fields, refer to the *Concur Invoice: Forms and Fields Setup Guide*.




GENERAL NOTES ABOUT ATTENDEE FIELDS




For the most part, attendee fields are like all other fields *except* admins cannot configure attendee fields as connected lists.

Refer to the *Approvers and Processors* section in this guide for information about using the "modify" field attribute for approvers and processors.

The table below describes the attendee fields.

Field Name	Description
Attendee Count	Total count of attendees by this attendee type
Attendee Name	Attendee's name
Attendee Title	Attendee's work title
Attendee Type	For example, Business Guest, Spouse, and This Employee
Company	Attendee's company
Company Category 1 Authorized Amount Previous YTD	Total pre-authorized spend on this attendee on selected expense categories by the entire company last year
Company Category 1 Authorized Amount YTD	Total pre-authorized spend on this attendee on selected expense categories by the entire company year-to-date

Field Name	Description
Company Category 1 Submitted Amount Previous YTD	Total spend on this attendee on selected expense categories by the entire company last year
Company Category 1 Submitted Amount YTD	Total spend on this attendee on selected expense categories by the entire company year-to-date
Company Category 2 Authorized Amount Previous YTD	Total pre-authorized spend on this attendee on selected expense categories by the entire company last year
Company Category 2 Authorized Amount YTD	Total pre-authorized spend on this attendee on selected expense categories by the entire company year-to-date
Company Category 2 Submitted Amount Previous YTD	Total spend on this attendee on selected expense categories by the entire company last year
Company Category 2 Submitted Amount YTD	Total spend on this attendee on selected expense categories by the entire company year-to-date
Created By (Private List)	Defines the "owner" of the attendee information  For more information, refer to the <i>Private vs Shared Attendee Lists</i> on the following pages.
Currency Key	As defined in the import, if imported; or same as the user's reimbursement currency, if the attendee was added by a user
Custom 1-20	Custom fields as defined by the company
Attendee Entry Custom 1-5	Custom fields used to collect information specific to the attendee on the current expense; this data can be extracted using the Attendee Detail extract
Employee Amount Previous Year	Total spend on this attendee by the current user last year  For more information, refer to <i>Amount Fields (Edit Attendee and Details)</i> on the following pages.
Employee Amount YTD	Total spend on this attendee by the current user year-to-date  For more information, refer to <i>Amount Fields (Edit Attendee Details)</i> on the following pages.
Employee Category 1 Authorized Amount Previous YTD	Total pre-authorized spend on this attendee on selected expense categories by the current user last year
Employee Category 1 Authorized Amount YTD	Total pre-authorized spend on this attendee on selected expense categories by the current user year-to-date
Employee Category 1 Submitted Amount Previous YTD	Total spend on this attendee on selected expense categories by the current user last year
Employee Category 1 Submitted Amount YTD	Total spend on this attendee on selected expense categories by the current user year-to-date

Field Name	Description
Employee Category 2 Authorized Amount Previous YTD	Total pre-authorized spend on this attendee on selected expense categories by the current user last year
Employee Category 2 Authorized Amount YTD	Total pre-authorized spend on this attendee on selected expense categories by the current user last year
Employee Category 2 Submitted Amount Previous YTD	Total spend on this attendee on selected expense categories by the current user last year
Employee Category 2 Submitted Amount YTD	Total spend on this attendee on selected expense categories by the current user year-to-date
External ID	Required for imported attendee records  For more information about the External ID, refer to <i>External ID - Required for Imported Changes and Deletions</i> in the configuration section in this guide.
First Name	Attendee's first name
Last Name	Attendee's last name
Middle Initial	Attendee's middle name initial
Suffix	Suffix for the attendee name
Total Amount Previous Year	Total spend on this attendee by all users company-wide last year  For more information, refer to <i>Amount Fields (Edit Attendee Details)</i> on the following pages.
Total Amount YTD	Total spend on this attendee by all users company-wide year-to-date  For more information, refer to <i>Amount Fields (Edit Attendee Details)</i> on the following pages.

PRIVATE VS. SHARED ATTENDEE LISTS

If an attendee list is *private*, then:

- Only the *current* user can use attendees from this list
- Only the *current* user can search this list
- If the user is allowed to add attendees to the list, then Concur Invoice will search only this user's attendees for duplicates

If an attendee list is *shared*, then:

- Any user can use attendees from this list
- Any user can search this list
- If users are allowed to add attendees to the list, then Concur Invoice will search all users' attendees for duplicates

The **Created By (Private List)** field, which is not visible to the user, has two functions. Concur Invoice uses this field to:


- Identify the "owner" of the attendee for editing or deleting; for example, in order for a user to edit attendee information or delete an attendee, the user must be the owner
- Identify if an attendee list is private or shared


Whether or not you include this field as one of the *search fields* and the *duplicate search fields* ultimately defines whether attendees list are private or shared.



Further explanation: Remember, the **Created By (Private List)** field is *always* hidden and is *always* populated with the user's user ID (cannot be changed; cannot be deleted). Therefore, if you add the **Created By (Private List)** field to the *search fields* or the *duplicate search fields*, the field is *always* part of the search or duplicate search.


- In the case of the *search fields*, the system will find only those attendees who have that same user ID in the **Created By (Private List)** field. In other words, the system will not search outside of the user's attendees. Therefore, to keep a list private, add the **Created By (Private List)** field so that users will not find each other's attendees.
- In the case of *duplicate search fields*, the system will match only attendees who have that same user ID in the **Created By (Private List)** field. In other words, the system will not search outside of the user's attendees for duplicates.

Summary: What do you want to accomplish?

Search for Attendees		
Type of List	Goal	Configuration
Shared	<p>I want each user's attendee list to be shared for this attendee type.</p> <p>That is, I want users to be able to search for attendees with this type created by anyone in the company or imported from a master list by the company.</p>	<p>When defining forms, on the Forms tab:</p> <ol style="list-style-type: none"> 1. Select the form type of <i>Expense Attendee</i>. 2. Select the desired form. 3. Click Modify Form. 4. In the Modify Form window, ensure that Created By (Private List) field is <i>not</i> checked. <p> For more information, refer to the <i>Configure Attendee Forms and Fields</i> section in this guide.</p>

Private	I want each user's attendee list to be private. That is, I want users to be able to search for attendees with this attendee type <i>only</i> in their own attendee list.	<p>When defining forms, on the Forms tab:</p> <ol style="list-style-type: none"> 1. Select the form type of <i>Expense Attendee</i>. 2. Select the desired form. 3. Click Modify Form. 4. In the Modify Form window, ensure that Created By (Private List) field is checked. <p> For more information, refer to the <i>Configuring Attendee Forms and Fields</i> section in this guide.</p>
---------	--	--

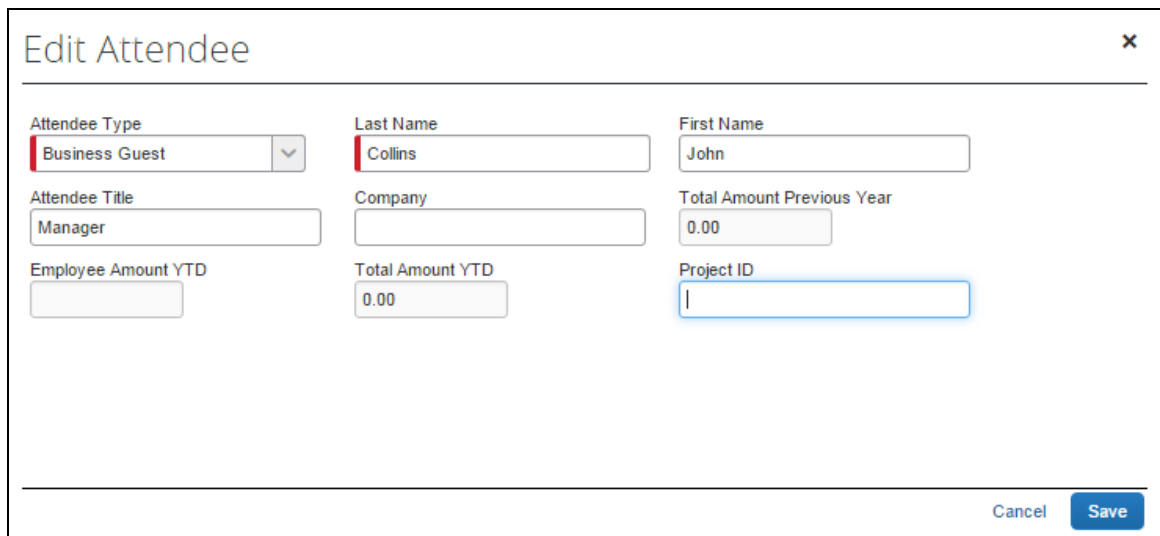
Search for Duplicates		
Type of List	Goal	Configuration
Shared	When a user adds an attendee with this attendee type, I want the system to search for duplicates among all attendees with this type created by anyone in the company or imported from a master list by the company.	<p>Click Administration > Expense > Attendees, and on the Attendee Types tab:</p> <ol style="list-style-type: none"> 1. Select the attendee type. 2. Click Modify. 3. In the Attendee Type window, in the Fields for duplicate search list, <i>do not</i> select <i>Created By (Private List)</i>. <p> For more information, refer to <i>Add Additional Attendee Types</i> and <i>Work with Other Attendee Settings</i> in this guide.</p>
Private	When a user adds an attendee, I want the system to check for duplicates <i>only</i> among attendees with this type, in the user's attendee list.	<p>Click Administration > Expense > Attendees, and on the Attendee Types tab:</p> <ol style="list-style-type: none"> 1. Select the attendee type. 2. Click Modify. 3. In the Attendee Type window, in the Fields for duplicate search list, select <i>Created By (Private List)</i>. <p> For more information, refer to <i>Add Attendee Types</i> and <i>Work with Other Attendee Settings</i> sections in this guide.</p>
Additional optional setting for duplicate attendee searches		

Shared or Private	<p>The two options above restrict the search to the same attendee type.</p> <p>I want to search <i>all</i> attendee types for duplicates.</p>	<ol style="list-style-type: none"> 1. Configure Shared or Private as described above. 2. Click Administration > Expense > Attendees. 3. On the Settings tab, select (enable) the Check for attendee duplicates across attendee types check box. <p> For more information, refer to <i>Add Attendee Types</i> and <i>Working with Other Attendee Settings</i> sections in this guide.</p>
-------------------	---	---

AMOUNT FIELDS (EDIT ATTENDEE)

The amount fields that appear on the **Fields** tab provide the accumulated totals (in the **Edit Attendee** window in Invoice) if you add these fields to the desired attendee form.

The following example the **Employee Amount YTD** and **Total Amount YTD** fields added to the attendee form for the Business Guest attendee type.



The screenshot shows the 'Edit Attendee' window with the following fields:

- Attendee Type:** Business Guest (dropdown menu)
- Last Name:** Collins
- First Name:** John
- Attendee Title:** Manager
- Company:** (empty text box)
- Total Amount Previous Year:** 0.00
- Employee Amount YTD:** (empty text box)
- Total Amount YTD:** 0.00
- Project ID:** (empty text box)

At the bottom right, there are 'Cancel' and 'Save' buttons.

Configure Attendee Forms and Fields


ACCESS FORMS AND FIELDS

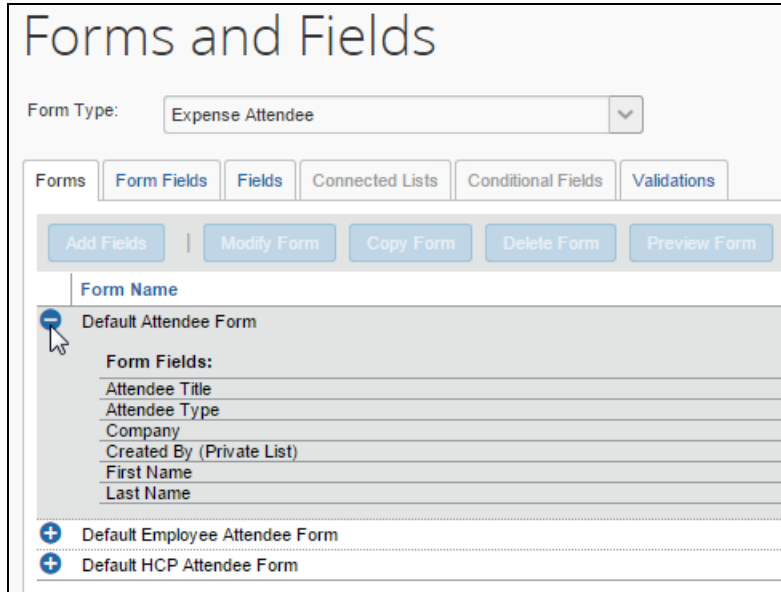
► To access the attendee forms and fields:

1. Click **Administration > Invoice > Forms and Fields**.
2. In the **Form Type** list, click *Expense Attendee*.

USE THE FORMS TAB: GENERAL

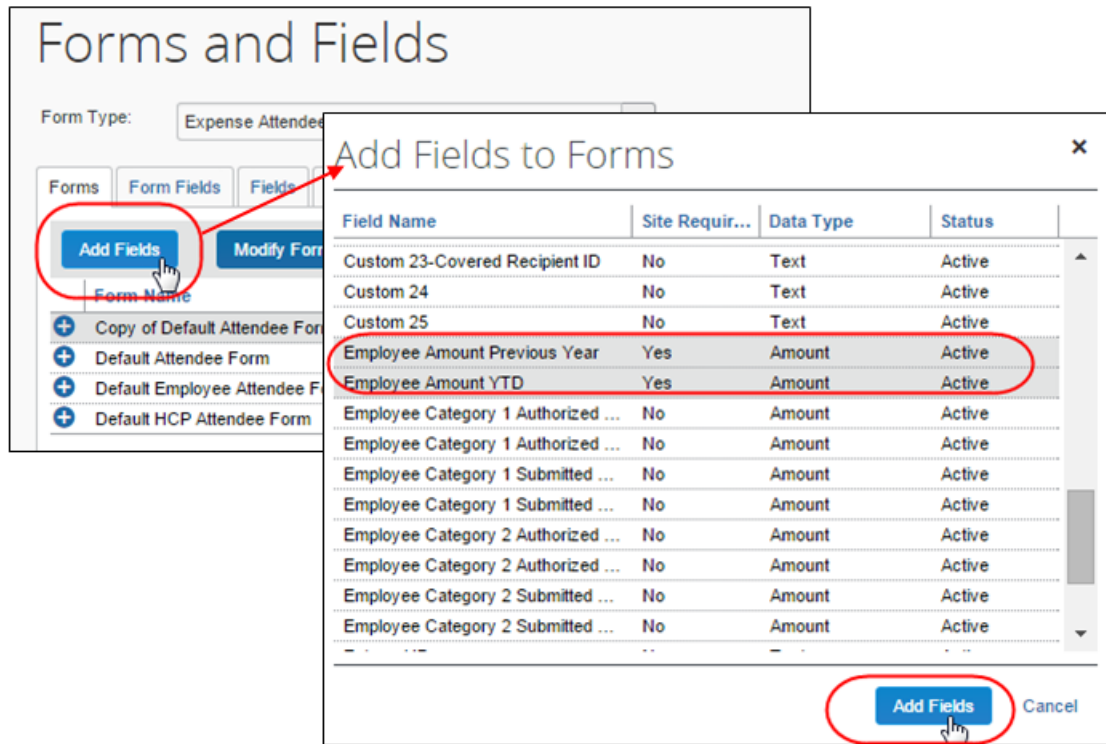
► *To make general changes on the Forms tab:*

1. To view the fields on the form, click the  icon to the left of the form name.



2. To create another form, click an existing form and click **Copy Form**.
3. To add fields to the form:
 - 1) Click the form.
 - 2) Click **Add Fields**.
 - 3) Select the desired fields.

4) Click **Add Fields**.



USE THE FORMS TAB: SEARCH FIELDS

► To Define the Search Fields:

1. To define the *search* fields (the fields that appear in the **Advanced Search** window), on the **Forms** tab, click the form.
2. Click **Modify Form**.
3. Select the desired fields.

The screenshot displays the 'Forms and Fields' configuration page. The 'Form Type' is set to 'Expense Attendee'. The 'Forms' tab is active, showing a list of forms on the left and a toolbar with buttons: 'Add Fields', 'Modify Form', 'Copy Form', 'Delete Form', and 'Preview Form'. The 'Modify Form' button is highlighted with a red circle and an arrow pointing to the 'Modify Form' dialog box.

The 'Modify Form' dialog box is titled 'Modify Form' and shows the 'Form Name' as 'Default Attendee Form'. It contains a section titled 'Attendee Search Form Fields' with a list of fields and checkboxes:

- ☐ Field Label
- ☒ Attendee Type
- ☒ Last Name
- ☒ First Name
- ☒ Attendee Title
- ☒ Company
- ☒ Created By (Private List)
- ☐ Total Amount Previous Year
- ☐ Employee Amount YTD
- ☒ Total Amount YTD
- ☐ Project ID

The 'Attendee Type', 'Last Name', 'First Name', 'Attendee Title', 'Company', and 'Created By (Private List)' fields are grouped together and highlighted with a red circle. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

- Click **Save**. The fields that you have added appear in the **Search Attendee** window.

USE THE FORM FIELDS TAB: GENERAL

► To make general changes on the Form Fields tab:

- To change the characteristics of a field:
 - Either:
 - Double-click the desired field.
 - or
 - Click the desired field and click **Modify Form Fields** (or **Remove Form Fields**).

Form Field Name	Required	Sequence
Default Attendee Form		
Attendee Type	Yes	1
Last Name	Yes	2
First Name	No	3
Attendee Title	No	4
Company	No	5
Created By (Private List)	Yes	6
Total Amount Previous Year	Yes	7

- Make the desired changes and then click **Save**.

NOTE: To change the sequence of the fields, drag and drop a field to the new location.

Step 2: Configure the Payment Request Attendee Detail View

Overview: Payment Request Attendee Detail View

Use these steps to provide additional information or suppress display of elements in the most common attendee grids (tables) as described in *Additional Attendee Information – Payment Request Attendee Detail View* in this guide.

The configuration steps are:

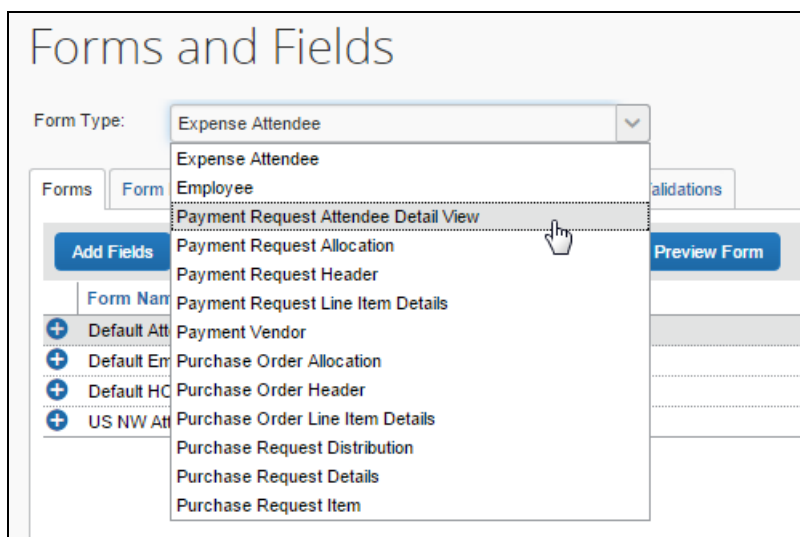
- Configure the view (form)
- Assign the form to one or more Concur Invoice groups

Configure the View

In the examples below, we will add as custom field (Custom 01 renamed **State**) to the view.

► To configure the view to add a new field:

1. Click **Administration > Invoice > Forms and Fields**.
2. From the **Form Type** list, click *Payment Request Attendee Detail View*.



NOTE: This view will be assigned to one or more groups. Unless the changes will be assigned to *all* groups, consider making a copy of the form so you still have the original with the original configuration.

3. Then, on the **Forms** tab (for the desired form or copy), click **Add Fields**.

Add Fields to Forms

Field Name	Site Requir...	Data Type	Status
Attendee Entry Custom 1	No	Text	Active
Attendee Entry Custom 2	No	Text	Active
Attendee Entry Custom 3	No	Text	Active
Attendee Entry Custom 4	No	Text	Active
Attendee Entry Custom 5	No	Text	Active
Custom 01	No	Text	Active
Custom 03	No	Text	Active
Custom 04	No	Text	Active
Custom 05	No	Text	Active
Custom 06	No	Text	Active
Custom 07	No	Text	Active
Custom 08	No	Text	Active
Custom 09	No	Text	Active
Custom 10	No	Text	Active

Add Fields Cancel

4. Select the desired field and click **Add Fields**. Concur Invoice adds the new field to the form.

Forms and Fields

Form Type: Payment Request Attendee Detail View

Forms | **Form Fields** | Fields | Connected Lists | Conditional Fields | Validations

Add Fields | **Modify Form** | **Copy Form** | **Delete Form** | **Preview Form**

Form Name

Default Payment Request Attendee Detail View

Form Fields:

- Attendee Count
- Attendee Name
- Attendee Title
- Attendee Type
- Company
- Custom 01
- Total Amount Previous Year
- Total Amount YTD

- To rename the field, click the **Forms Fields** tab, select the field you want to change, and then click **Modify Form Fields**.

Forms and Fields

Form Type: Payment Request Attendee Detail View

Forms | **Form Fields** | Fields | Connected Lists | Conditional Fields | Validations

Modify Form Fields | Remove Form Fields | Add Fields | Preview Form | Search:

Form Field Name | Column Name | Required

Default Payment Request Attendee Detail View

Form Field Name	Column Name	Required
Attendee Name	ATTENDEE_NAME	No
Attendee Title	TITLE	No
Company	COMPANY	No
Attendee Type	ATN_TYPE_KEY	Yes
Attendee Count	INSTANCE_COUNT	No
Total Amount Previous Year	TOTAL_AMOUNT_PREV_YEAR	Yes
Total Amount YTD	TOTAL_AMOUNT_YTD	Yes
Custom 01	CUSTOM1	No

- In the **Modify Form Fields** window that appears, in the **Field Label** field, change the name to *State*, and then click **Save**.

Modify Form Fields

Field Name: Custom 01

Field Label: State

Data Type: Text

Tool Tip:

☐ Required

Control Type: Edit

Max Length (chars): 100

Validation: None

Default Value Type: None

Access Rights

Employee Role: Read-only

The result will appear on the form on the **Forms** tab.

Note the following:

- Like any other form, you can use the **Forms Fields** tab to modify field properties, change the sequence, and remove fields
 - The **Fields**, **Connected Lists**, and **Validations** tabs are not available since they do not apply to "view" forms
- **To select an attendee form:**
1. Click **Administration > Invoice > Group Configurations**. The **Group Configurations** page appears.
 2. Click the desired group and click **Modify**.

3. In the **Attendee List Form** list, select the desired form.

Configuration for Group: Global

Group: Global

Group Name: Global

Attendee List Form: Default Payment Request Attendee Detail View

☒ Allow users to upload CFDi attachments

☒ Allow Invoice Owners to create payment requests.

☐ Allow Invoice Owners to change vendors on assigned requests.

Select whether vendor banking information is hidden, required, or optional for

Invoice Owner: Hidden

Vendor Manager: Hidden

Cancel Save

4. Click **Save**. The selection that you have made determines which Attendee form that should be displayed when a new attendee is added.

Step 3: Add the Attendees field to the Payment Request Line Item Details Form

In order for the **Attendees** tab to display in Concur Invoice, the administrator needs to add the **Attendees** field to the *Payment Request Line Item Details* form.

► **To add the Attendees field:**

1. Click **Administration > Invoice > Forms and Fields**.
2. In the **Form Type** list, select *Payment Request Line Item Details*.
3. On the **Forms** tab, select the form to which you want to add the **Attendees** field, and then click **Add fields**.
4. In the **Add Fields to Forms** window that appears, select the **Attendees** field, and then click **Add Fields**.

Step 4: Edit the Attendee-Related Expense Types

Overview: Understand Attendee Count Configuration

When allowing user-entered attendee count, two settings (expense type/policy and attendee type) are used together.

- The *expense type/policy* setting indicates whether the user can enter a count for this particular expense type, for example, Catering. To access this, click **Administration > Invoice > Expense Types**.

Expense Types

MODIFY EXPENSE TYPE: CATERING

1 General 2 Policies 3 Attendees

Policy Name	Enable Attendee	Show Cost per Attendee	Allow users to edit the Cost per Attendee	Allow users to enter the count of "No Shows"	Allow users to edit the count of attendees	Include user as an attendee by default	Display the Add New Attendees button from the attendee table
Limit WF	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Request Policy	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase from Pref. vendors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Receipt workflow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wire Transfer - Project Policy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- The *attendee type* setting indicates whether the user can enter a count for this particular attendee type, for example, Business Guest. To access this, click **Administration > Expense > Attendees**.

Expense Admin

Attendees

Attendee Type

Attendee Type Name: Business Guest

Attendee Type Code: BUSGUEST

Expense Attendee Form: Default Attendee Form

Fields for duplicate search: Attendee Title, Company, Created By (Private List), Fir

Data Source for Attendee Search: Concur

Allow users to add attendees of this type: ☒

Allow users to edit the count for this type: ☐

Save Cancel

If the admin configures at least one *attendee type* to be editable, then at least one *expense type* must be configured to be editable (and vice versa). If not, the column never displays (and, hence, the count is never editable).

Assume in this example:

- The Advertising expense type is configured to be editable
- The Business Guest attendee type is configured to be editable

Distributions

Distribution Summary

Attendees

Attendees

New Attendee

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Attendee Count	Total Amount ...	Total Amount ...	State	Amount
<input checked="" type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest	5	\$0.00	\$0.00		\$75.00
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$15.00
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest	1	\$0.00	\$0.00		\$15.00

For each Advertising expense type, the **Attendee Count** column appears and:

- The field is editable for each Business Guest attendee
- For any other attendee type, the field is not editable

For each expense type that the admin configures for attendees and that is *other than* Advertising, the **Attendee Count** column does not appear, regardless of attendee type.

Move the Attendee Count Column for Visibility

Admins can move the **Attendee Count** column that displays in the Payment Request Attendee Detail Form view to a different location within the grid, for example, leftwards for greater visibility to laptop and netbook users. To move the field, the Concur Invoice admin first opens the *Payment Request Attendee Detail View* form in Forms and Fields, then, using standard drag-and-drop technique, moves the field to its new location:

Forms and Fields

Form Type:

Payment Request Attendee Detail View

Forms

Form Fields

Fields

Connected Lists

Conditional Fields

Validations

Modify Form Fields

Remove Form Fields

Add Fields

Preview Form

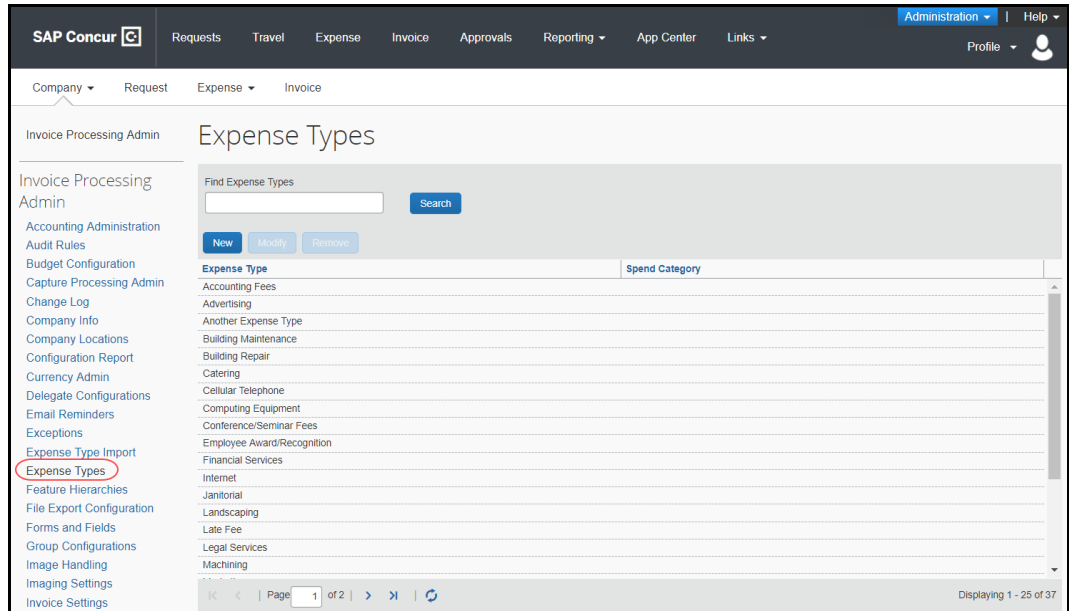
Search:

Form Field Name	Column Name	Required	Sequence
Default Payment Request Attendee Detail View			
Attendee Name	ATTENDEE_NAME	No	1
Attendee Title	TITLE	No	2
Company	COMPANY	No	3
Attendee Type	ATN_TYPE_KEY	Yes	4
State	CUSTOM1	No	5
Attendee Count	INSTANCE_COUNT	No	6
Total Amount Previous Year	TOTAL_AMOUNT_PREV_YEAR	Yes	7
Total Amount YTD	TOTAL_AMOUNT_YTD	Yes	8

Edit Expense Types

► To edit an attendee-related expense type:

1. Click **Administration > Invoice > Expense Types**.



2. Either:

- ◆ Double-click the desired expense type.
– or –
- ◆ Click the desired expense type and click **Modify**.

Expense Types

MODIFY EXPENSE TYPE: CATERING

1 General
2 Policies
3 Attendees

Name:

3. Click **Next** until you reach the **Attendees** tab.


Expense Types

MODIFY EXPENSE TYPE: CATERING

1 General 2 Policies 3 Attendees

Policy Name	Enable Attendee	Show Cost per Attendee	Allow users to edit the Cost per Attendee	Allow users to enter the count of "No Shows"	Allow users to edit the count of attendees	Include user as an attendee by default	Display the Add New Attendees button from the attendee table
Limit WF	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Request Policy	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase from Pref. vendors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Receipt workflow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wire Transfer - Project Policy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. Select (enable) or clear (disable) the desired check boxes, as described below.

Field	Description
Enable Attendee	Select this check box to enable the Attendee feature.
Show Cost per Attendee	Select this check box to allow users to <i>view</i> the amount of the expense allotted to each attendee. If selected, the Amount column appears in the Attendees section of the Attendee tab.
Allow users to edit the Cost per Attendee	Select this check box to allow users to <i>edit</i> the amounts in the Amount column.
Allow users to enter the count of "No Shows"	Select this check box to allow users to account for "No Shows," that is attendees who were invited but did not attend. If selected, the No Shows field appears in the Attendees section of the Attendee tab.
Allow users to edit the count of attendees	Select this check box to allow users to enter a count (number of unnamed attendees) for this expense type. If selected, the Attendee Count column appears in the Attendee section of the Attendee tab. NOTE: This feature is used in conjunction with attendee type settings.  For more information, refer to the <i>Procedure: Configure Attendee Types</i> section in this guide.
Include user as an attendee by default	If this check box is selected, Concur Invoice automatically adds the user as an attendee when the user accesses the attendees section the first time (when no attendees are assigned to the entry). Once attendees are assigned or if the user removes their name as an attendee, Concur Invoice does not attempt to add the user again.

Field	Description
Display the Add New Attendees button from the attendee table	If this check box is selected, Invoice adds the Add New Attendee button to the Attendee section of the Attendee tab.

- Click **Next** and then **Done**.
- Use these same steps to edit all desired expense types.

The options in the **Attendees** step in the Expense Types tool in Invoice Administration are also available in the Policies tool. To access these same options, on the **Policies** page, select a policy and then click the **Expense Types** button. Double-click an expense type. The **Modify Expense Type Properties** window appears with the options that are also available in the Expense Types tool.

Modify Expense Type Properties

Enable Attendee: ☒

Default Attendee Type: ▼

Show cost per attendee on Attendee Summary: ☒

Allow user to edit cost per attendee on Attendee Summary: ☒

Allow user to enter the count for No Show attendees: ☒

Allow user to edit the count of attendees: ☒

Include user as attendee by default: ☒

Display the Add New Attendees button from the attendee table: ☒

Cancel Save

Overview: Restrict Attendee Types by Expense Type

To reduce the possibility of selecting the wrong attendee when working with expense types, the administrator can filter the available attendee types. The admin does this by suppressing the display of selected attendee types under the **Exclude Attendee Types** column when modifying expense types within a policy.

NOTE: If the form assigned to an expense type does *not* include the **Attendees** field, the feature cannot be used because the **Exclude Attendee Types** column (explained below) will not appear.

The attendees available for selection are filtered at the following points in Concur Invoice:

- New Attendee
- Attendee Advanced Search

Filter Attendee Types for Expense Types by Exclusion

► ***To exclude attendee types for selected expense types:***

1. Click **Administration > Invoice > Policies**.
2. Click a policy, and then click **Expense Types**.
3. Configure the expense type to exclude attendees by navigating to the **Exclude Attendee Types** and noting the status:
 - ♦ **Add:** Appears when no attendees have been excluded.
 - ♦ **Modify (#):** Appears when <#> number of attendees are excluded.

Exclude Attendee Types
Add
Modify (1)

4. Click either **Add** or **Modify <#>**. The **Exclude Attendee Types** window appears (figure below shows one attendee type (Spouse) excluded from *Catering*).

Exclude Attendee Types for Expense Type: Catering

Attendee Type	Exclude
Business Guest	<input type="checkbox"/>
Employees (not using Concur)	<input type="checkbox"/>
HCP Providers	<input type="checkbox"/>
Sister Company Employees	<input type="checkbox"/>
Spouse	<input checked="" type="checkbox"/>
This Employee	<input type="checkbox"/>

Cancel
Save

5. Under the **Exclude** column, either:
 - ♦ **Exclude the attendee type:** Select (enable) the associated check box.
– or –
 - ♦ **Include the attendee type:** Clear (disable) the associated check box.
6. (Optional) Repeat for each expense type for which you want to exclude attendee types.
7. Click **Save**.

NOTE: If the option is not available, the **Attendee** field will need to be added to the form for the given expense type.

Set the Default Attendee Type for an Expense Type

Admins can specify a single attendee type as the default attendee type for an expense type when they select and work with an invoice.

► ***To set the default attendee type for an expense type:***

1. Click **Administration > Invoice > Policies**.
2. Click a policy, and then click **Expense Types**.
3. Double-click the desired expense type. The **Modify Expense Type Properties** window appears.

The screenshot shows the 'Modify Expense Type Properties' window. The 'Default Attendee Type' dropdown is open, displaying a list of attendee types. A red rectangle highlights the dropdown menu. The options in the dropdown are: None, Business Guest, Employees (not using Concur), Spouse, This Employee, HCP Providers, and Sister Company Employees. A mouse cursor is pointing at the 'None' option. Other settings in the window include: 'Enable Attendee' (unchecked), 'Show cost per attendee on Attendee Summary' (unchecked), 'Allow user to edit cost per attendee on Attendee Summary' (unchecked), 'Allow user to enter the count for No Show attendees' (unchecked), 'Allow user to edit the count of attendees' (unchecked), 'Include user as attendee by default' (unchecked), and 'Display the Add New Attendees button from the attendee table' (checked). The 'Save' button is highlighted in blue.

4. In the **Default Attendee Type** list, select one attendee type.

NOTE: The list of available attendees may be limited if some attendee types have been excluded for the expense type.

- Click **Save**.

Overview: Suppress the New Attendee Button by Expense Type

By default, the **New Attendee** button appears to the user. The administrator can suppress this button in the **Expense Types** or **Policies** tool to prevent a user from adding an attendee and thereby forcing the user to search for the attendee first, ensuring the attendee is not already in the system.

Distributions

Distribution Summary

Attendees

Attendees

Advanced Search

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Attendee Count	Total Amount ...	Total Amount ...	State	Amount
<input checked="" type="checkbox"/>	Wong, Tom	Senior Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$35.00
<input type="checkbox"/>	Lee, Sandra	HR Manager	Brooks Dev	Business Guest	1	\$0.00	\$0.00		\$35.00
<input type="checkbox"/>	Johnson, Bill	Manager	Convex	Business Guest	1	\$0.00	\$0.00		\$35.00

Procedure: Suppress the New Attendee Button by Expense Type

In this example, we will use the Policies tool to suppress the **Add Attendee** button by the Catering expense type.

► To configure the view to suppress the Add Attendee button:

- Click **Administration > Invoice > Policies**.
- Select the policy, and then click **Expense Types**.

Policies			
<input type="button" value="Copy Policy"/> <input type="button" value="Modify"/> <input type="button" value="Remove"/>			
		<input type="button" value="Auto Submit Conditions"/>	<input type="button" value="Expense Types"/>
Policy Name	Editable By	Applies To	
Limit WF	Global		
Purchase Request Policy	Global		
Purchase from Pref. vendors	Global	Global	
Wire Transfer - Project Policy	Global	Global	

- Double-click the expense type to open the **Modify Expense Type Properties** window.

4. Clear the **Display the New Attendee button from the attendee table** (shown in its selected, default state in the figure below).

Modify Expense Type Properties

Enable Attendee: ☐

Default Attendee Type:

Show cost per attendee on Attendee Summary: ☒

Allow user to edit cost per attendee on Attendee Summary: ☐

Allow user to enter the count for No Show attendees: ☐

Allow user to edit the count of attendees: ☐

Include user as attendee by default: ☐

Display the Add New Attendees button from the attendee table: ☒

Cancel Save

5. Click **Save**.

Step 5: Add Attendee Types and Work with Other Attendee Settings

To work with attendee types and attendee settings, the admin must go to **Administration > Expense > Attendees** (left menu). The Attendee tool consists of two pages, **Attendee Types** and **Settings**.

NOTE: The Concur Invoice admin must ensure they have the Expense Configuration Administration role, in addition to the Invoice Configuration Administration tool, to work with the Attendee tool.

Overview: Attendee Types

On the **Attendee Types** page, you can:

- While adding or editing attendee types:
 - ◆ Define the fields that are used in "duplicate" searches
 - ◆ Define whether to allow users to add attendees of this type
 - ◆ Define whether to allow users to enter an attendee count of this type
 - ◆ Define the data source to search for that attendee type
- Inactivate attendee types

"THIS EMPLOYEE" ATTENDEE TYPE

Concur Invoice uses the This Employee attendee type when it automatically adds Invoice users as attendees. This is a system attendee type, so it cannot be inactivated.

NOTE: Admins can turn off the automatic creation feature. However, SAP Concur recommends that it remains turned on. For more information, refer to the attendee **Settings** tab.

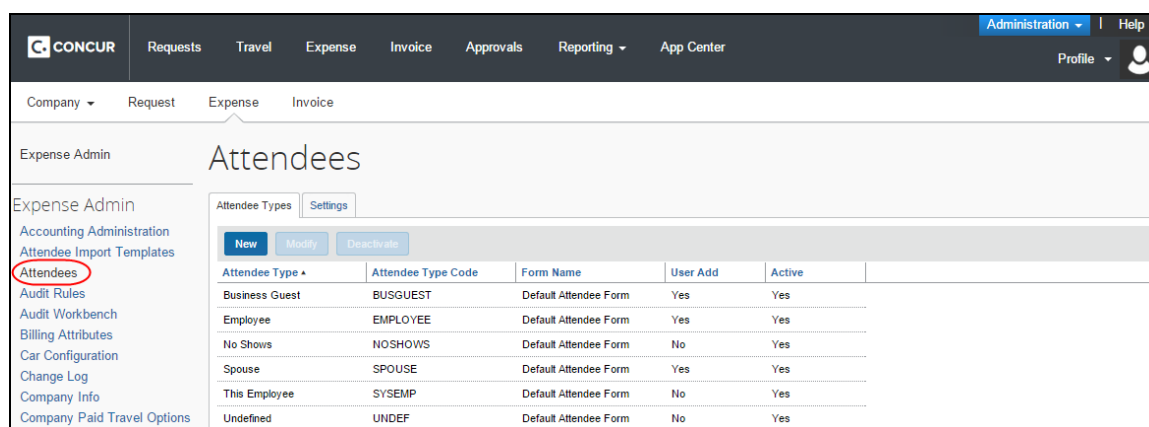
When the admin clicks **New** or **Modify**, the **Edit Attendee Type** page appears with the following options:

Field	Description
Attendee Type	This Employee
Attendee Type Code	SYSEMP; cannot be edited
Expense Attendee Form	Default Attendee Form
Fields for duplicate search	External ID and Created By (Private List)
Data Source for Attendee Search	Concur is the data source
Allow users to add attendees of this type	No; cannot be edited
Allow users to edit the count for this type	No; cannot be edited

Procedure: Configuring Attendee Types

► To access the attendee types:

Click **Administration > Expense > Attendees** (left menu). The **Attendees** page appears.




► **To modify an attendee type:**

1. On the **Attendee Types** tab, either:
 - ◆ Double-click the desired attendee type.
 - or –
 - ◆ Select the desired attendee type and click **Modify**.

The **Attendee Type** window appears.

2. Complete the appropriate fields.

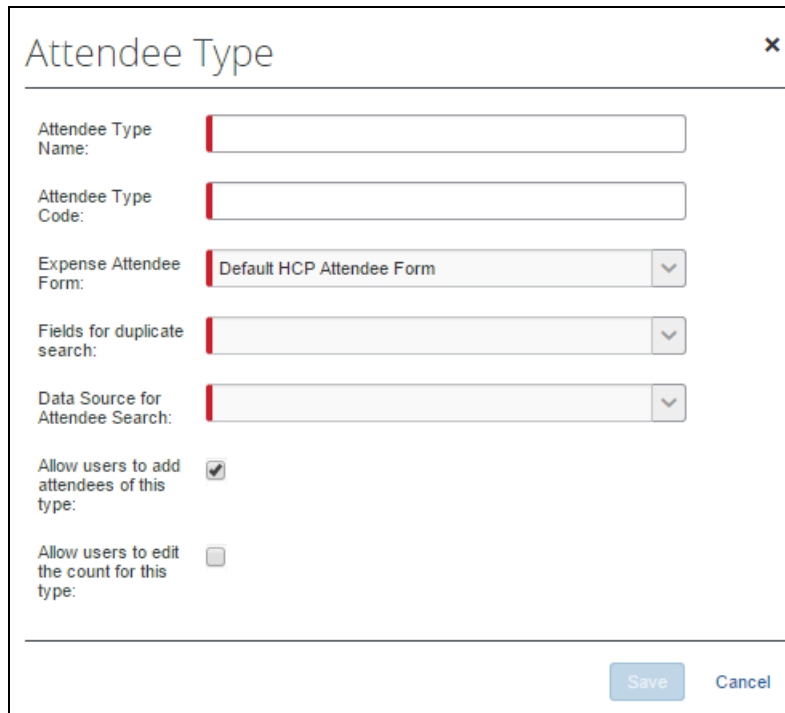
Field	Description
Attendee Type Name	Change the name as desired.
Attendee Type Code	Change the code as desired. The code can be 1 to 8 alphanumeric characters, all uppercases, and no spaces.
Expense Attendee Form	Select the desired attendee form.

Field	Description
Fields for duplicate search	<p>Select the field(s) that will be used to check for duplicates.</p> <p>NOTES:</p> <ul style="list-style-type: none"> • If the intent is for your users to have <i>private</i> attendee lists, then include the Created By (Private List) field as a duplicate search field for this attendee type. • If you plan to have the system check for duplicates across attendee types, note that the system will successfully check for duplicates across attendee types only if the duplicate check fields are the same on all attendee types.
Data Source for Attendee Search	<p>Select the data source used when searching for attendees of this type.</p> <p>NOTE: This field is used by the Fetch Attendee Callout. If you are using this callout, select the system that you configured in the Register Application Connectors page of Web Services Admin.</p> <p> For more information, refer to the <i>Fetch Attendee Callout</i> information on http://developer.concur.com.</p>
Allow users to add attendees of this type	<p>Select this check box to allow users to add attendees with this attendee type.</p> <p>NOTE: If you are using the Fetch Attendee Callout, this check box will be cleared and not editable.</p>
Allow users to edit the count for this type	<p>Select to allow users to enter a count (number of unnamed attendees) for this attendee type.</p> <p>IMPORTANT: This option is used in conjunction with the <i>expense type</i> setting. For more information, refer to <i>Overview: Understand Attendee Count Configuration</i> section in this guide.</p>

3. Click **Save**.

► **To add a new attendee type:**

1. On the **Attendee Types** tab, click **New**. The **Attendee Type** window appears.



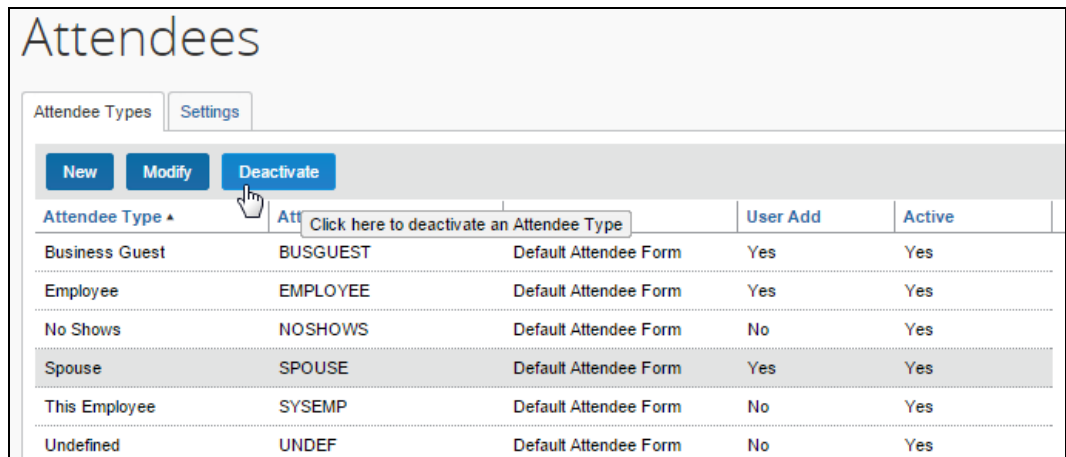
The **Attendee Type** window contains the following fields and options:

- Attendee Type Name:** Text input field.
- Attendee Type Code:** Text input field.
- Expense Attendee Form:** Dropdown menu with "Default HCP Attendee Form" selected.
- Fields for duplicate search:** Dropdown menu.
- Data Source for Attendee Search:** Dropdown menu.
- Allow users to add attendees of this type:** Checked checkbox.
- Allow users to edit the count for this type:** Unchecked checkbox.
- Buttons:** "Save" and "Cancel" at the bottom right.

2. Complete the fields as described in the previous section about editing existing attendee types.
3. Click **Save**.

► **To deactivate an attendee type:**

1. On the **Attendee Types** tab, select the desired attendee type(s).
2. Click **Deactivate**.



The **Attendees** screen shows a table of attendee types with columns: **Attendee Type**, **Attendee Code**, **Default Attendee Form**, **User Add**, and **Active**. A **Deactivate** button is visible above the table.

Attendee Type	Attendee Code	Default Attendee Form	User Add	Active
Business Guest	BUSGUEST	Default Attendee Form	Yes	Yes
Employee	EMPLOYEE	Default Attendee Form	Yes	Yes
No Shows	NOSHOWS	Default Attendee Form	No	Yes
Spouse	SPOUSE	Default Attendee Form	Yes	Yes
This Employee	SYSEMP	Default Attendee Form	No	Yes
Undefined	UNDEF	Default Attendee Form	No	Yes

Note the following about deactivating an attendee type:

- When you deactivate an attendee type, all attendees with that attendee type are also marked as inactive and are no longer available for users to include on an expense.
- An attendee type that has been deactivated cannot later be made active.
- If you deactivate an attendee type and then later want to use it again, create a new attendee type. You cannot use the same name as the original. You can, however, modify the original and rename it. Then, you can create the new attendee type using the original name of the deactivated attendee type.
- You cannot deactivate the No Shows and This Employee attendee type.

Overview: Settings

On the **Settings** tab, you can:

- Define the expense types that will be included when calculating attendee totals
- Define whether attendee types are restricted by user groups
- Define whether duplicate attendee searches happen across attendee types
- Define whether to allow Concur Invoice to automatically create an attendee record (SYSEMP attendee type) for the current user
- Define whether to have the system generate an External ID for attendees manually added by users



For more information about the External ID, refer to *External ID - Required for Imported Changes and Deletions* section in this guide.

AMOUNT TOTAL YTD COLUMN

If you choose to display the **Amount Total YTD** column, be aware that:

- The amount shown is the total amount spent company-wide for that attendee (not only from the current user) for the selected expense type(s)
 - and –
- The currency used is:
 - ♦ The currency that is set in the import record, if the attendee was imported
 - or –
 - ♦ The same as the user's invoice currency, if the attendee was added by a user

NOTE: The amount shown is the total amount spent company-wide across all solutions the company uses, for example, across both Concur Expense and Concur Invoice.



There is another way to add this column to this page. For more information, refer to the *Additional Attendee Information – Payment Request Attendee Detail View* section in this guide.

EXCHANGE RATES REQUIRED

For the system to maintain totals for attendees, currency conversion may be required. The amount allotted to each attendee is calculated in the user's invoice currency. If the attendee currency is different from the user's invoice currency, then the system must convert the amount (in the user's invoice currency) to the amount in the attendee currency. For that conversion to be successful, the appropriate exchange rates must be imported.

- If the Exchange Rates feature is activated *and* the user's invoice currency is included in the Exchange Rates import—converted to the attendee currency—then conversion takes place and the attendee totals are adjusted accordingly.
- If the Exchange Rates feature is *not* activated or if the appropriate currency has not been imported, then the user sees a message that briefly explains the issue and refers the user to your company's Concur Expense administrator.



For more information, refer to the *Concur Expense: Currency Admin Setup Guide*.

Procedure: Configure Settings

► To change settings:

1. On the **Attendees** page, click the **Settings** tab.

The screenshot shows the 'Attendees' configuration page with the 'Settings' tab selected. A 'Save' button is at the top left. The settings are organized into several sections:


- Expense Types:** Includes a dropdown for 'Expense Types to be included in the annual total of cost per attendee:', a checkbox for 'Include Invoice Expense Types in Annual Total of cost per attendee:', and another dropdown for 'Invoice Expense Types to be included in the annual total of cost per attendee:'.
- Search and Display Options:** Includes a checkbox for 'Display My Team in advanced search options:' (which is highlighted with a blue circle), a checkbox for 'Allow users to add attendees from meetings via email to Concur (*.ics files):', a checkbox for 'Display attendee total for calendar year:', and a checkbox for 'Enable attendee type group management:'.
- Duplicates and Automatic Creation:** Includes a checkbox for 'Check for attendee duplicates across attendee types:', a checked checkbox for 'Allow automatic creation of employees as attendees (SYSEMP attendee type):', and a checkbox for 'Generate an External ID when a new attendee is created by a user:'.
- Audit and Reporting:** Includes dropdowns for 'Audit Rule Group By Field for Expense Reports:', 'Audit Rule Group By Field for Requests:' (set to 'Division'), 'Category Group 1 for Attendee Totals:', 'Category Group 2 for Attendee Totals:', 'Expense Type Group 1 for Attendee Totals:', and 'Expense Type Group 2 for Attendee Totals:'.

2. Complete the appropriate fields.



For information about Expense-specific settings, refer to the *Concur Expense: Attendee Setup Guide*.

Field	Description	Applies to
Expense Types to be included in the annual total of cost per attendee	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Expense
Include Invoice Expense Types in Annual Total of cost per attendee	When the administrator selects this setting, all the expense types selected in the setting below will be included in the annual total of cost per attendee. This setting is cleared (disabled) by default.	Concur Invoice
Invoice Expense Types to be included in the annual total of cost per attendee	This setting contains a list of all the expense types that the administrator can select. When the administrator selects one or several expense types in this list, the amount from these expense types will be included in the total for a given attendee.	Concur Invoice
Display My Team in advanced search options	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Expense
Allow users to add attendees from meetings via email to Concur (*.ics files)	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Expense
Display attendee total for calendar year	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Invoice and Concur Expense
Enable attendee type group management	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Invoice and Concur Expense

Field	Description	Applies to
Allow automatic creation of employees as attendees (SYSEMP attendee type)	<p>Selected (enabled) by default; change if desired.</p> <p>NOTE: The system will automatically generate a record for each Concur Invoice user but <i>only</i> once the user takes one of these actions:</p> <ul style="list-style-type: none"> The user opens a new expense form where the user is required to be added by default. The user completes a This Employee attendee type search from the Attendee section of the Attendees tab. The user completes a quick search from the Attendee section of the Attendees tab. <p>At the same time, the user is added to the attendee list, the External ID field is populated with the user's Employee ID.</p> <p> For more information, refer to the <i>Include All Employees in a Company in the Attendee Search</i> section in this guide.</p>	Concur Invoice and Concur Expense
Check for attendee duplicates across attendee types	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Invoice and Concur Expense
Generate an External ID when a new attendee is created by the user	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Invoice and Concur Expense
Audit Rule Group by Field for Expense Reports	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Expense
Audit Rule Group by Field for Requests	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Request
Category Group 1 for Attendee Totals	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Expense
Category Group 2 for Attendee Totals	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Expense
Expense Type Group 1 for Attendee Totals	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Expense
Expense Type Group 2 for Attendee Totals	Refer to the <i>Concur Expense: Attendees Setup Guide</i> .	Concur Expense

3. Click **Save**.

Overview: Attendee Types by User Groups

The administrator can define (or restrict) attendee types to specific groups. Therefore, when a user adds, edits, views, or searches for an attendee, only the specified attendee types for that user's group will be available. For example, perhaps users in a Sales group can select and manage client attendees where non-Sales users cannot.

This way, different groups of employees can see a restricted and more appropriate set of attendee types.

NOTE: One case may occur rarely. If an attendee is added to an entry, *and* that specific attendee type is later made inactive for the user's group, *and* the user later opens the entry, that attendee's information will no longer be editable by the user.

Procedure: Configure Attendee Types by User Groups

The configuration includes two parts:

- **Attendee setting:** One-time process to turn on the feature
- **Group configuration:** Completed for each group

► **To assign attendee types to groups:**

1. On the **Group Configurations** page, click the **Modify** link in the **Attendee Types** column for the group you want to affect. The **Configuration for Group** window appears.

Attendee Types	Is Active For Group
Business Guest	<input checked="" type="checkbox"/>
Employee	<input checked="" type="checkbox"/>
Spouse	<input checked="" type="checkbox"/>

Cancel Save

All attendee types appear except No Shows and This Employee since they are system attendee types and cannot be inactive.

2. Select the check box for all attendee types that should be active for the group.

NOTE: Not all types can be activated/inactivated. If an attendee type is set to *Active* at the parent group level, it will remain active at the child group level and cannot be changed to *Inactive*. If the attendee type is set to *Inactive* at the parent group level, it can be overridden at the child group level and set to *Active*.

3. Click **Save**.

Step 6: Include All Employees in a Company in the Attendee Search

You can make every employee at your company available within an attendee search for ease of selection and addition to the invoice. When an employee is added, an attendee record is automatically created if no record already exists.

Procedure: Part 1 – Confirm Auto-Create Attendee Record is Enabled

In this step, you will verify that the setting to auto-create Attendee records is enabled.

NOTE: Before proceeding with changes after initial implementation, ensure that, if the setting is *not* selected, why this is the case at your site. *It is critical to understand why the setting is not enabled before altering the setting* (it is selected by default). There may be a strategic or system reason for inactivating it and that must be understood before proceeding.

► ***To verify and enable the Allow automatic creation of employees as attendees (SYSEMP attendee type) setting:***

1. Click **Administration > Expense > Attendees** (left menu).
2. Click the **Settings** tab.
3. Select the **Allow automatic creation of employees as attendees (SYSEMP attendee type)** check box.

Allow automatic creation of employees as attendees
(SYSEMP attendee type): ☒

Procedure: Part 2 – Attendee Types and Employee Attendee Records

This step describes how you rename the existing Employee attendee type and save it with a more descriptive name for your users.

► **To rename and save the Employee attendee type:**

1. Click **Administration > Expense > Attendees** (left menu).
2. On the **Attendee Types** tab, click *Employee* and then click **Modify**. The **Attendee Type** window appears.

3. Rename this attendee type, as each attendee type name must be unique. Suggested changes based on Concur users:
 - ♦ **All Employees are Concur Users**
Rename as "*Employees (inactive attendee type)*" to clearly show users that, on selection of this attendee type, they are now searching across all employees using an inactive attendee type (see Step 3, next).
 - ♦ **Some Users are Concur Users, But You Want to Search Everyone**
Rename as "*Employees (not using Concur)*". This name instructs the user they are selecting employees "outside" of Concur, users who are not yet associated with Concur (by way of attendee records in Concur Invoice).
4. In the **Fields for duplicate search** list, ensure that *Created By (Private List)* is *not* selected.
5. Click **Save**.

Procedure: Part 3a – Inactivate the Employee Attendee Type if All Employees Are Concur Users

If you know that all employees you want in an attendee search are also Concur users, then best practice is to inactivate the *"Employees (not using Concur)"* attendee type renamed in Step 2 so that it is no longer available for selection by the user.

If you are making this change after you have been collecting production data for a period, consider inactivating this attendee type and creating a new one. Doing this performs a user-wide "fresh start" for their employee attendee records by inactivating all existing Employee attendee type records.

NOTE: Inactivating *any* attendee type will inactivate *all* attendees of that type, so SAP Concur suggests prior notice of this change to explain the new behavior to your users.

► **To deactivate the Employee attendee type:**

1. Click **Administration > Expense > Attendees** (left menu).
2. On the **Attendee Types** tab, click *Employees (not using Concur)* and click **Deactivate**.

The screenshot shows the 'Attendees' configuration page. At the top, there are tabs for 'Attendee Types' and 'Settings'. Below these are three buttons: 'New', 'Modify', and 'Deactivate'. The 'Deactivate' button is circled in red. Below the buttons is a table with the following columns: 'Attendee Type', 'Attendee Type Code', 'Form Name', 'User Add', and 'Active'.

Attendee Type	Attendee Type Code	Form Name	User Add	Active
Business Guest	BUSGUEST	Default Attendee Form	Yes	Yes
Employees (not using Concur)	EMPLOYEE	Default Attendee Form	Yes	Yes
No Shows	NOSHOWS	Default Attendee Form	No	Yes
Spouse	SPOUSE	Default Attendee Form	Yes	Yes
This Employee	SYSEMP	Default Attendee Form	No	Yes
Undefined	UNDEF	Default Attendee Form	No	Yes

3. Click **Yes** in the confirmation window that appears.

The screenshot shows a confirmation dialog titled 'Deactivate Attendee Type'. It contains a question mark icon and the following text: 'This action deactivates all attendees associated with this Attendee Type, making them unavailable for use in expenses. Employees will need to use a different Attendee Type to create a new attendee entry. Deactivate selected attendee type(s)?'. At the bottom right, there are two buttons: 'Yes' and 'No'.

BENEFITS OF INACTIVATING AND STANDARDIZING EMPLOYEE RECORDS

The benefit of inactivating all the existing and many times duplicated Employee-Attendee records is to standardize your employees each to a single record. This allows you "cleaner" Reporting data and precision of use for employees in any attendee role.

Procedure: Part 3b – Add a New Attendee Type

In this step, you will add a new attendee type by using the identical name of the attendee type you deactivated in Step 3a.

NOTE: Since the attendee type name and code must both be unique in the list, you are prevented from creating another with the same values. For the purposes of this exercise, you will simply edit an existing record to change its name (only) and thus make the old name once again available for use.

For example, if you changed the Employee attendee type to "*Employees (not using Concur)*" and then deactivated it in Step 3a, you may now rename this deactivated attendee type to "*Employees (no longer used)*", save that change, and create a new attendee type using the name "*Employees (not using Concur)*" which is active and may be immediately put into use.

► ***To add a new attendee type:***

1. Click **Administration > Expense > Attendees** (left menu).
2. On the **Attendee Types** tab, click **New**.
3. Enter "*Employees (not using Concur)*" as the new attendee type name, and a different attendee type code, such as EMPLOYES, not to exceed the limit of seven characters.

4. Select the additional fields to meet your company's needs (as described earlier in this guide). They make look similar to the following figure:

5. Click **Save**.

Procedure: Part 4 – Configure SYSEMP Attendee Type

In this step, the admin configures the SYSEMP attendee type for attendee search.

► To configure the SYSEMP attendee type for attendee search:

1. Click **Administration > Expense > Attendees** (left menu).
2. On the **Attendee Types** tab, in the **Attendee Type Code** column, select **SYSEMP**.
3. Click **Modify** and rename the attendee type to *Employees* or similar name that best represents those employees who are users of Concur.
4. In the **Expense Attendee Form** list, select *Default Employee Attendee Form* to make this a shared list.

Discussion: This can utilize any attendee form that you have created for this purpose that is configured as a shared list (that is, *Created By* is *not* selected in the form search attributes in Modify Form). If you have not created a special attendee form for Employees, the Default Employee Attendee Form will correctly set the configuration to allow this to be a shared list for attendee searches.

5. In the **Fields for duplicate search** list, adjust *Fields for duplicate search* for use with a shared list by selecting and clearing duplicate search field selections:
 - ◆ **Remove (clear the check box):** Created By (Private List)
 - ◆ **Add (select the check box):** First Name, Last Name, Company (Note that an additional field is required in addition to Name fields; the Company field option meets this requirement)

The window should appear similar to the following figure:

6. Click **Save**.

► **To finish with Forms and Fields:**

1. Click **Administration > Invoice > Forms and Fields** (left menu).
2. In the **Form Type** list, click *Expense Attendee*.
3. Select the attendee form you assigned to the SYSEMP attendee type and then click **Modify Form**.

4. Ensure that the **Created By (Private List)** check box is *not* selected.

The screenshot shows the 'Forms and Fields' configuration page. The 'Form Type' is set to 'Expense Attendee'. The 'Modify Form' dialog is open, showing the 'Form Name' as 'Default Employee Attendee Form'. Under 'Attendee Search Form Fields', the 'Created By (Private List)' checkbox is highlighted with a red circle, indicating it should not be selected. Other fields like 'Field Label', 'Attendee Type', 'Last Name', 'First Name', 'Attendee Title', and 'Company' are also listed but not selected. The 'Save' and 'Cancel' buttons are at the bottom right of the dialog.

IMPORTANT: SYSEMP with Non-Employees

The Employee (SYSEMP) attendee type is used to automatically add employees to a client's attendee list, so that users can quickly find other employee attendees. In some cases, company requirements drive the creation of user accounts for people who are *not* employees of the company, such as contractors.

Due to regulatory and client requirements, there must be a way to clearly define the precise and correct attendee type for the user who is *not* an employee. The solution is to use a profile (employee) field to indicate which users are not employees. Users who are *not* employees will:

- Not be automatically added to the Employee Attendee type
- Not be searchable via the Employee attendee type
- Not be automatically added as an attendee for an expense type configured to do so for employees

CLIENT CONFIGURATION OF NON-EMPLOYEE

Clients interested in using this feature must contact SAP Concur support for assistance. SAP Concur staff will add the **Is Non Employee** field to the profile (Employee form) as described below.

Then, the client can:

- Use its own internal resources to determine which Concur Invoice users are non-employees
- Access User Administration to work with the relevant **Is Non Employee** fields for each non-employee

NOTE: The **Is Non Employee** field is not available in the user import.

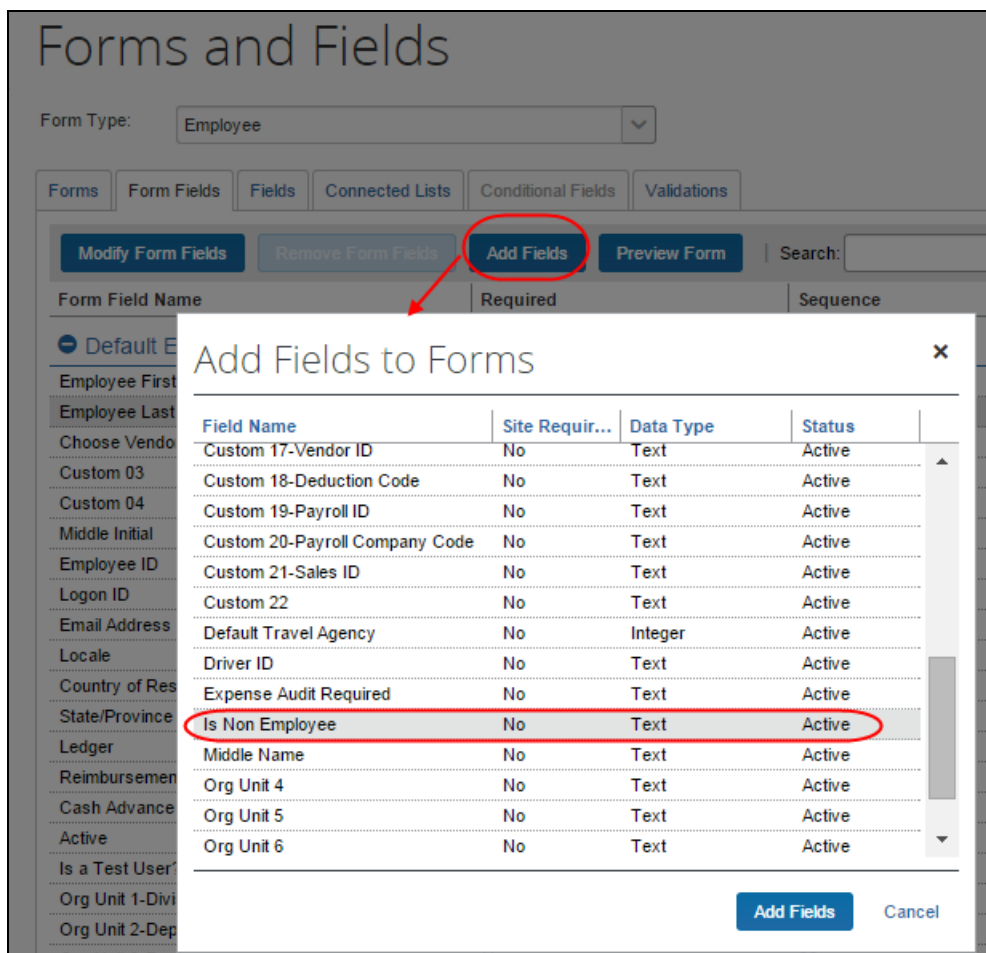
SAP CONCUR CONFIGURATION OF NON-EMPLOYEE

SAP Concur staff will follow the configuration/activation steps noted below. The process is to add the new **Is Non Employee** field to the employee form and then make the field modifiable by the Employee Administrator.

▶ ***To add the Is Non Employee field and make it modifiable:***

1. Click **Administration > Invoice > Forms and Fields** (left menu).
2. In the **Form Type** list, click *Employee*.
3. Click the **Form Fields** tab.

4. Click **Add Fields**.



5. Select the **Is Non Employee** field.
6. Click **Add Fields**. The **Is Non Employee** field now appears on the Employee form.

7. To ensure that the field is modifiable by the employee admin, double-click the **Is Non Employee** field. The **Modify Form Fields** window appears.

The screenshot shows the 'Modify Form Fields' dialog box. On the left, a list of form fields is visible, with 'Is Non Employee' circled in red. The main area of the dialog contains the following fields:

- Field Name: Is Non Employee
- Field Label: Is Non Employee
- Data Type: Text
- Tool Tip: (empty)
- ☐ Required
- Control Type: dropdown menu showing 'checkbox'
- Max Length (chars): 1
- Default Value Type: dropdown menu showing 'None'

The 'Access Rights' section contains several role-based permissions:

- Employee Role: dropdown menu showing 'Hidden'
- Employee Administrator Role: dropdown menu showing 'Modify' (highlighted with a red box and a mouse cursor)
- Sponsor Role: dropdown menu showing 'Hidden'
- Company Bill Statement User Role: dropdown menu showing 'Hidden'
- Company Bill Statement Approver Role: dropdown menu showing 'Hidden'
- Company Bill Statement Processor Role: dropdown menu showing 'Hidden'
- Company Bill Statement Processor Manager Role: dropdown menu showing 'Hidden'

8. In the **Employee Administrator Role** list, click *Modify*.
9. Click **Save**.

Step 7: Create Attendee Audit Rules

You can create audit rules that allow you to flag attendees, for example, for the total amount spent, per expense type, on any attendee, totaled either solution-wide or by the current employee.

Amount totals that apply to the current employee are stored with the line entry. Amount totals that apply to the entire company are stored with the line entry and the attendee record.

NOTE: Audit Rules totals can be configured per solution (Concur Expense or Concur Invoice), but a single audit rule total cannot be configured across both Concur Expense and Concur Invoice.

Use the Audit Rules tool in Administration to create attendee audit rules.

Invoice Processing Admin

Audit Rules

Custom Random Validation

1 Audit Rule 2 Conditions 3 Exception

Name: Attendee

Event: Payment Request Attendee Submit

Editable By: Global

Applies To: Global

Invoice Expense Types for Attendee Totals:

Active: Yes



For more information about audit rules, refer to the *Concur Invoice: Audit Rules Setup Guide*.

Step 8: Import a List of Attendees

You can import a list of attendees for your company, for example, your company's client list or list of employees. This way, they appear in the Attendees list so users do not have to enter them manually (and perhaps inconsistently). You can also use the import feature to change attendee information or delete attendees.



To import a list of attendees, refer to the *Shared: Attendee Import, Version 2 Specification*.

IMPORTANT! Use the Attendee Import on an Existing System

If you are planning to use the attendee import on an existing system (already has attendees), refer to the *Implement the Attendee Import on an Existing System - Tips and Hints* section in this guide.

External ID Required for Imported Changes and Deletions

The External ID is required to make changes to attendees (edit or delete) via the import. In most cases, the External ID is a company-generated unique identifier, which is imported with the initial import of attendees. However, if Concur Invoice users manually enter attendees, it is not likely that there is an External ID. Without this information, you cannot change or remove those attendees via the import.

To solve this problem, you can have the system auto-generate an External ID for each attendee so that the External ID will never be blank.

CONFIGURATION

To activate this feature, select **Generate an External ID when a new attendee is created by a user** on the **Settings** tab of the **Attendees** page.

The screenshot shows the 'Attendees' configuration page with the 'Settings' tab selected. A 'Save' button is at the top left. The settings include several dropdown menus and checkboxes. The checkbox 'Generate an External ID when a new attendee is created by a user' is circled in red.

Setting	Value/Status
Expense Types to be included in the annual total of cost per attendee:	[Dropdown menu]
Include Invoice Expense Types in Annual Total of cost per attendee:	<input type="checkbox"/>
Invoice Expense Types to be included in the annual total of cost per attendee:	[Dropdown menu]
Display My Team in advanced search options:	<input type="checkbox"/>
Allow users to add attendees from meetings via email to Concur (*.ics files):	<input type="checkbox"/>
Display attendee total for calendar year:	<input type="checkbox"/>
Enable attendee type group management:	<input checked="" type="checkbox"/>
Check for attendee duplicates across attendee types:	<input type="checkbox"/>
Allow automatic creation of employees as attendees (SYSEMP attendee type):	<input checked="" type="checkbox"/>
Generate an External ID when a new attendee is created by a user:	<input type="checkbox"/> (highlighted)
Audit Rule Group By Field for Expense Reports:	[Dropdown menu]

EXTRACT THE EXTERNAL IDS

Then, to obtain the External IDs for all attendees (so you can use them in an import) collect them from the Standard Attendee Detail Extract:

- If the Standard Attendee Detail Extract is already turned on for your company, the file will be available with your other extract files.
- If not, contact SAP Concur support to have it turned on.



For more information, refer to the *Invoice: Standard Attendee Detail Extract, Version 1 Specification*.

Section 6: Retaining Attendee History with Associated Expense Entry

Overview

By default, Concur Invoice does not capture historical attendee information; only the current attendee information (master record) is available. Contact SAP Concur support to have the point-in-time attendee information saved with the associated invoice entry.

Attendee information (such as name or title) can change over time. With this feature, once the attendee is attached to an invoice entry, that attendee information is stored and not allowed to be changed when the master record changes.

Section 7: Implementing Attendee Import on Existing System - Tips and Hints

Change from a User-Entered List to a Managed List of Attendees

In existing systems (not yet using the import), it is likely that each Concur Invoice user entered a record for every attendee the user wanted to use, including the Concur Invoice user. This means that it is highly likely that many of the attendees you want to import from another application already exist within the system—and many will exist multiple times.

To start fresh with a new list of attendees from the imported list, follow these steps:

Step #	Description	Where to find more information
1	Define the name of the attendee type for this list. Attendee type names must be unique. Tip: If you want the same name as the existing attendee type, we recommend that you rename the existing attendee type and then create a new attendee type with the desired name.	<i>Procedure: Configure Attendee Types</i> in this guide
2	Determine if users will be allowed to add new attendees to the attendee type list. If you want to control this list, you may wish to turn off the users' ability to add new attendees.	
3	Create the import file and import the list of attendees.	<i>Shared: Attendee Import, Version 2 Specification</i>
4	Inactivate the old attendee type. This will remove all attendees of this type from all users' lists of attendees, though the information will still be viewable on expenses using those attendees.	<i>Procedure: Configure Attendee Types</i> in this guide

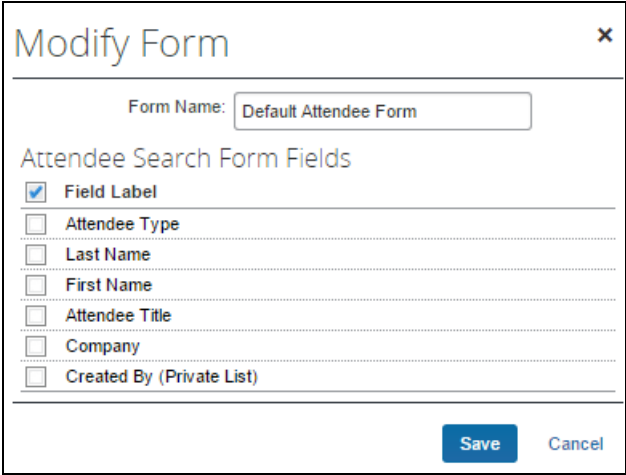
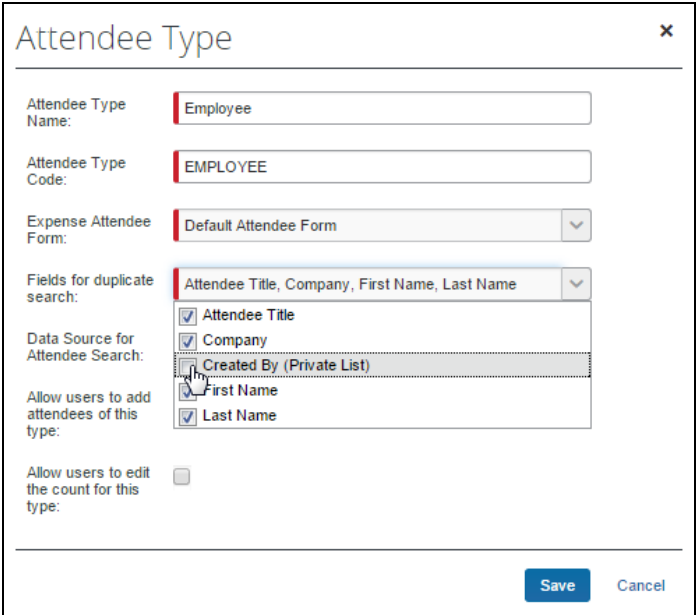
Change Employees as Attendees to a Managed List of Attendees

There are two employee-related attendee types:

- **Employee:** You may have a situation where each user had to enter a record for every *employee* attendee the user wanted to use, including the employee. This means that it is highly likely that many of the employee attendees already exist multiple times within the system.
- **This Employee:** The system will automatically generate a record for each Concur Invoice user but *only* once the employee takes one of these actions:
 - ♦ The employee opens a new expense form where the employee is required to be added by default
 - ♦ The employee completes a This employee attendee type search from the **Attendee** section of the **Attendee** tab
 - ♦ The employee completes a search from the **Attendee** section of the **Attendee** tab

To make this list a comprehensive and usable list of employees that can be shared by all for use on expenses, follow these steps:

Step #	Description	Where to find more information
1	<p>Create an import file containing data for the employee attendee records and import the list. This will provide records for those employees who have not yet accessed the Attendee section as well as provide additional details in each employee attendee record.</p> <p>When creating the import file:</p> <ul style="list-style-type: none"> The External ID for these records <i>must</i> be the Employee ID that appears in Invoice. The Attendee Type Code <i>must</i> be SYSEMP. <p>NOTE: Consider importing <i>all</i> employees who will be used as attendees—not only those who use Concur Invoice. This will provide a comprehensive list of employee attendees from which your Concur Invoice users can search and select. Then, if the imported employees who are not yet Concur Invoice users become users in the future, the Employee ID will be used to link the attendee-related information to the correct user.</p>	<i>Shared: Attendee Import, Version 2 Specification</i>
2	<p>Configure the This Employee attendee type:</p> <ul style="list-style-type: none"> Change the name if desired. Attendee type names must be unique. If you want the same name as the existing Employee attendee type, then you must rename the existing Employee attendee type first and then change <i>This Employee</i> to <i>Employee</i>. 	<i>Procedure: Configure Attendee Types</i> in this guide
	<ul style="list-style-type: none"> Configure the This Employee attendee type as a shared list by removing the Created By field in the duplicate check field. 	<i>Private vs. Shared Attendee Lists</i> and <i>Procedure: Configuring Attendee Forms and Fields</i> in this guide
3	Inactivate the old Employee attendee type. This will remove all attendees of this type from all users' lists of attendees, though the information will still be viewable on expenses using those attendees. Users creating new expenses will search for and use employee attendee records under the new This Employee attendee type.	<i>Procedure: Configure Attendee Types</i> in this guide

Step #	Description	Where to find more information
4	<p>Change the new Employee attendee type to a shared list.</p> <ul style="list-style-type: none"> Change the form fields for search: clear the Created By (Private List) check box  <ul style="list-style-type: none"> Edit the duplicate check: clear the Created By (Private List) check box 	<p><i>Private vs. Shared Attendee Lists</i> in this guide</p>

