Shared: Attendee Administrator

User Guide

Last Revised: June 14, 2013

Applies to these SAP Concur solutions:

- Expense
  - Professional/Premium edition
  - Standard edition

- Travel
  - Professional/Premium edition
  - Standard edition

- Invoice
  - Professional/Premium edition
  - Standard edition

- Request
  - Professional/Premium edition
  - Standard edition
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## Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Notes/Comments/Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 27, 2020</td>
<td>Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated</td>
</tr>
<tr>
<td>January 15, 2020</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>March 21, 2019</td>
<td>Changed the term &quot;payment request&quot; to &quot;invoice&quot; where applicable; no other content changes.</td>
</tr>
<tr>
<td>February 12, 2019</td>
<td>Updated the copyright; no other changes; cover date not updated.</td>
</tr>
<tr>
<td>April 16, 2018</td>
<td>Changed the check boxes on the front cover; no other changes; cover date not updated</td>
</tr>
<tr>
<td>January 26, 2018</td>
<td>Updated the copyright; no other changes; cover date not updated.</td>
</tr>
<tr>
<td>December 15, 2016</td>
<td>Changed copyright and cover; no other content changes.</td>
</tr>
<tr>
<td>January 8, 2016</td>
<td>Changed from an Expense guide to a Shared guide; no other content changes.</td>
</tr>
<tr>
<td>February 11, 2015</td>
<td>Removed references to the current UI; no other content changes.</td>
</tr>
<tr>
<td>January 16, 2015</td>
<td>Updated the screen shots to the enhanced UI; no other content changes.</td>
</tr>
<tr>
<td>October 14, 2014</td>
<td>Added information about the two user interfaces; no other content changes.</td>
</tr>
<tr>
<td>June 14, 2013</td>
<td>The Attendee Admin role can now work with attendees who have been configured so they could not be added to a report manually – prior to this change this role could not manage these attendee types.</td>
</tr>
<tr>
<td>April 3, 2012</td>
<td>Removed all references to the legacy Authorization Request feature in Concur Expense.</td>
</tr>
<tr>
<td></td>
<td>Changed any references to Concur's Travel Request service to either Request or to Authorization Request, depending on the situation.</td>
</tr>
<tr>
<td></td>
<td>No other content changes.</td>
</tr>
<tr>
<td>December 28, 2012</td>
<td>Made rebranding and/or copyright changes; no content changes.</td>
</tr>
<tr>
<td>August 17, 2012</td>
<td>The Attendee Type value can be changed for an attendee if the attendee is not associated with a report with a status of Submitted.</td>
</tr>
</tbody>
</table>
Attendee Administrator

Section 1: Permissions

You may or may not have the correct permissions to use this tool. You may have limited permissions, for example, you can affect only certain groups and/or use only certain options (view but not create or edit).

If you need to use this tool and do not have the proper permissions, contact your company’s Concur administrator.

Section 2: Overview

The attendee admin tool allows the user to view, modify, and activate or inactivate any attendee record in the system. This provides the capability to perform real-time update and correction of records that need intervention. Examples of these situations are:

- Imported attendee records where the correction must be quickly made and cannot wait for the next import event
- User-entered attendee records with inaccurate or incomplete information
- Duplicate attendee records where one or more of the set of duplicates needs to be inactivated

This has two roles:

- **Attendee Administrator:** The user assigned this role can access, view, and edit information for any attendee in the system, regardless of whether the attendee was imported or entered manually and regardless of whether the attendee is on a private or shared list. The Attendee Administrator can also activate and deactivate attendees

- **Attendee Administrator (Read Only):** The user assigned this role can access and view information for any attendee in the system, regardless of whether the attendee was imported or entered manually and regardless of whether the attendee is on a private or shared list. This role cannot modify the attendee information.

Section 3: Manage Attendees

Access the Attendee Admin Page

The **Attendee Admin** page is available on the **Administration** menu.
Section 3: Manage Attendees

- **To access the Attendee Admin page:**
  1. Click **Administration > Company > Tools.**
  2. In the left menu, click **Attendee Admin.**

- Use the **Search** tab by using predefined criteria to search for attendees
- Use the **Advanced Search** tab to search for attendees using more specific criteria in a search by form approach.
- Use **Modify** to make changes to the attendee.
- Use **Activate** or **Inactivate** to change the status of selected attendees

**NOTE:** Users with the Attendee Administrator (Read Only) role can only view.

### Search for Attendees

- **To search for attendees using simple criteria:**
  1. On the **Search** tab, select the criteria you want to search for, for example, by **Last Name, First Name**, etc. To further refine your search, add additional criteria to the second search line; for example, **External ID, Last Name**, etc.
2. For a more targeted search, make a selection in the following list and enter the desired search text.

3. From the Status list, select Active, Inactive, or Active and Inactive.

4. To search by who created the attendees, in the Created By field, start entering the name.

A list of names displays. Select the appropriate name.
5. Click **Search**. The list of attendees displays.

### Attendee Admin

<table>
<thead>
<tr>
<th>External ID</th>
<th>Attendee Name</th>
<th>Attendee Title</th>
<th>Company</th>
<th>Attendee Type</th>
<th>Status</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Weather, James</td>
<td>CEO</td>
<td>LenDev</td>
<td>Business Guest</td>
<td>Active</td>
<td>Brown, Tony</td>
</tr>
<tr>
<td></td>
<td>Trocheck, Lily</td>
<td>CFO</td>
<td>LenDev</td>
<td>Business Guest</td>
<td>Active</td>
<td>Brown, Tony</td>
</tr>
<tr>
<td></td>
<td>Champagne, Anne</td>
<td>AAA</td>
<td>LenDev</td>
<td>Business Guest</td>
<td>Active</td>
<td>Brown, Tony</td>
</tr>
<tr>
<td></td>
<td>Smith, David</td>
<td></td>
<td></td>
<td>Business Guest</td>
<td>Active</td>
<td>Brown, Tony</td>
</tr>
<tr>
<td></td>
<td>Smith, John</td>
<td>Director of Finance</td>
<td>KYZ Company</td>
<td>Business Guest</td>
<td>Active</td>
<td>Gates, Bailey</td>
</tr>
<tr>
<td></td>
<td>Michael, Jane</td>
<td>Travel Service Mgmt</td>
<td>KYZ Company</td>
<td>Business Guest</td>
<td>Active</td>
<td>Gates, Bailey</td>
</tr>
<tr>
<td></td>
<td>John, Steve</td>
<td>CIO</td>
<td>KYZ Company</td>
<td>Business Guest</td>
<td>Active and Inactive</td>
<td>Gates, Bailey</td>
</tr>
</tbody>
</table>

- **To perform an advanced search for attendees:**
  1. On the **Advanced Search** tab, select the desired attendee type.

### Attendee Admin

2. Enter additional information to limit the search results to the appropriate attendee records. A full set of form fields for the attendee is available for entering search criteria.

3. From the **Status** list, select *Active*, *Inactive*, or *Active and Inactive*.

4. To search by who created the attendees, in the **Created By** field, start entering the name.
   
   A list of names displays. Select the appropriate name.
5. Click **Search**. The list of attendees displays.

**Modify Attendees**

- **To modify an attendee:**
  1. Either:
     - Select the desired attendee and click **Modify**.
     - or -
     - Double-click the attendee name.
The Modify Attendee window displays.

2. Make the desired changes.

**NOTE:** The administrator can change the Attendee Type value for an attendee added to a report, request, or invoice up to the point at which the report, request, or invoice is submitted, after which this value is locked down by the system.

3. Click **Save**.

**Activate or Inactivate Attendees**

If an attendee has ever been used on any expense, that attendee cannot be deleted from the system. However, you can inactivate an attendee so that users can no longer select that attendee.

- **To activate or inactivate an attendee:**
  1. Select one or more of the desired attendee(s).
  2. Click **Activate** or **Inactivate**, whichever applies.

**View Attendees**

- **To view an attendee:**
  1. Either:
     - Select the desired attendee and click **Modify** if you have the Attendee Administrator role or **View** if you have the Attendee Administrator (Read Only) role.
     - or -
     - Double-click the attendee name.

     Depending on your role, the **Modify/View Attendee** window displays.
2. When you are finished, click Done.