Shared: Attendee Import, Version 1

Specification

Last Revised: September 28, 2021

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

Date	Notes / Comments / Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
September 28, 2021	Updated the *External ID* section
April 14, 2021	Updated the copyright year; no other changes; cover date not updated
November 23, 2020	Clarified content regarding the External ID in the *Update/Replace* and *External ID* sections. Added important notes in the *Data for Record Type 100 – Attendee Fields* table for the External ID and Attendee Type Code. Red text highlights the critical importance of the External ID field to the attendee import process.
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
August 27, 2019	Added the Permissions section
February 12, 2019	Updated the copyright; no other changes; cover date not updated
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 2, 2018	Updated the cover and footer; no other changes; cover date not updated
January 23, 2018	Updated the copyright and the cover; no other changes; cover date not updated
January 22, 2016	Changed from book "chapters" to stand-alone guides; no content changes
November 30, 2014	Integration Administrator has changed to Import/Extract Administrator; no other content changes
July 19, 2013	Added new fields and created version 2 of the import
	Edited this chapter, added the new chapter, renumbered subsequent chapters
April 12, 2012	Documentation error - External ID field is 48 characters
March 23, 2012	Changed character numbers of the first name, company, and the 20 custom fields
December 31, 2010	Updated the copyright and made rebranding changes; no content changes
April 13, 2010	Clarification around *Record Type 200 – Employee-Attendee Map Fields*
	Map records add or remove an existing attendee on the individual user's Favorite Attendees list.
	This is a data-entry convenience for the user to allow the company to add the attendee to the user's favorites - it does not mark the attendee as owned by that employee and the employee will be able to *use* but not *edit* that attendee.
February 2, 2010	Clarified information about:
	♦ Last Name
	♦ Attendee External ID
November 13, 2009	Added information about the automatic generation of the External ID

Date	Notes / Comments / Changes
June 2008 (SU32)	Add clarification about how the attendee import updates an existing record (see section *Update/Replace*)

Attendee Import, Version 1

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 SAP Concur administrator.

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

Section 2: IMPORTANT - Two Import Guides

There are separate guides for the different versions of the import:

- Attendee Import, Version 1

- Attendee Import, Version 2
  Added Middle Initial, Suffix, and five new custom fields

Before creating your data file, verify with Concur that you are using the proper import guide.

Section 3: Overview

A client uses this feature to import attendee data for one or more attendee types. These attendees are then available for users to search for and select from when entering expenses or managing their list of attendees.

   Refer to the *Concur Expense: Attendees Setup Guide* for more information about the Attendees feature.

Section 4: Attendee Import – The Basic Process

The basic steps are described ***briefly*** here and then described ***in detail*** on the following pages:

- **Step 1:** The client creates an import data file, ensuring that it complies with the requirements of this specification.
- **Step 2:** The client moves the import data file to Concur.
- **Step 3:** Concur runs a batch job that imports the data file.

Section 5: Step 1: Creating the Import Data File

The client assembles the import data file, formatting it according to the specifications in this document. The import data file specifications are as follow:

- **Format Type:** Delimiter-Separated Value, UTF8
- **Supported Field Delimiter:** Comma
- **Enclosing Character:** Quotation Mark
- **Record Delimiter:** CRLF
- **Data Record Layout:** There are the record types in the attendee import file. The record types are:
    - ♦ 100 (Attendee fields)
    - ♦ 200 (Employee-Attendee Map Fields)

The record types are referenced in the tables on the following pages.

File Naming Conventions

The data file name should be of the format "jobtype_entitycode_datetime.txt". The job type for an attendee import data file is "attendee." If an entity has the code t0000123abcd, then the file name for the import data file would be "attendee_t0000123abcd_yyyymmddhhmnss.txt".

Update/Replace

The attendee import will update an existing record if one is found, or it will create a new record. By default, this import updates the existing record with those fields that are non-blank in the import file; blank fields are ignored.

The correct record to update is found by matching on the External ID field (and without regard for attendee type):

- If no match is found, then a new record is created.
- If one and only one match is found, then that record is updated. If the found record is marked as deleted, it will be reactivated (based on the import record inactive field setting) and updated.
- If more than one matching record is found
    - ♦ If only one is active, that record will be updated.
    - ♦ If more than one is active or none are active, the record will fail to import and be logged as a warning in the error log.

External ID

The **External ID** field is critical in the attendee import process. The External ID is required to make changes to existing attendees (edit or delete) using the import.

> **!** **IMPORTANT:** The **External ID** field MUST be unique across all attendees within the system, without regard for attendee type.

Automatically-created attendee records used for employees (SAP Concur users, under attendee type SYSEMP) is enabled by default. In these records, the Employee ID from the user profile is the value in the **External ID** field. **Please consider the pattern used for Employee ID when importing attendee records**, to ensure that External ID remains unique across all attendees.

External ID – Employees as Attendees (SYSEMP)

The External ID is set to the Employee ID from the user's profile when employees as attendees are automatically created by the application using the SYSEMP attendee type. This MUST be considered when considering External ID for imported attendees and global uniqueness of this field.

External ID – Automatic Assignment

In most cases, the External ID is a company-generated unique identifier, which is imported with the initial import of attendees. However, for attendees who are manually entered by Concur Expense users, there likely is no External ID. Without that 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 manually entered attendee so that the External ID will never be blank.

📖   Refer to the *Concur Expense: Attendees Setup Guide* for more information about the Attendees feature.

Specifications

Record Type 100 – Attendee Fields

This record type is used to add new or update existing attendee records.

The following fields are controlled by the form design and values are not imported if the field is not part of the form design:

- First_name
- Last_name
- Title

- Company
- Custom1-20

Table 1: *Data for Record Type 100 – Attendee Fields*

Name	Definition	Required?	Description	Client Field Definition
Record Type	100	Y		
External ID	48 characters maximum	Y	Unique identifier for the attendee This is the identifier used to determine whether this is an *add* or *update* to an existing record. **IMPORTANT NOTE**: The External ID MUST be unique across all attendees, without regard for attendee type. This includes automatically created employees as attendees (SYSEMP attendee type) which use Employee ID from the user profile as the attendee External ID. 📖 Refer to the *Update/ Replace* section above for specific logic.	
Attendee Type Code	8 characters maximum	Y	Attendee type code for the attendee type assigned to this attendee. Must represent an active attendee type or the record will not be imported. **IMPORTANT NOTE**: The importer can and will update the attendee type based on a matched External ID for the record.	
Currency Code	3 characters; case insensitive	Y	Defines the currency to be used for totaling costs for this attendee This value is used for a new attendee record and is ignored for an update. Must be an existing ISO 3-character alpha or 3-digit numeric code for the currency	
Last Name	132 characters maximum	Y	Attendee last name	

Name	Definition	Required?	Description	Client Field Definition
First Name	50 characters maximum	N	Attendee first name Value is not imported if field is not defined on the applicable form	
Company	150 characters maximum	N	Name of the attendee's company Value is not imported if field is not defined on the applicable form	
Title	32 characters maximum	N	Title of the attendee Value is not imported if field is not defined on the applicable form	
Inactive	1 character; Y or N	N	If null or N, the attendee is marked as active. If set to Y, the existing attendee record will be marked as inactive. Additionally, the attendee will be removed from all employee **My Attendees** lists.	
YTD Total	Amount	N	Starting YTD total for the current year This value is used for a new attendee record to set a starting value, and is ignored for an update	
Custom 1 - 20	100 characters maximum(for *each* of the twenty fields)	N	Custom field data is validated: • Value is not imported if the field is not defined on the applicable form • First, check the attendee type form for any custom fields that are required. If the form specifies custom fields and the import row does not provide them, this is treated as an error and the record is not processed. • If a custom field is required and the value does not pass a validation, this is treated as an error. • If a custom field is not required and the value	

Name	Definition	Required?	Description	Client Field Definition
			does not pass a validation, a warning is logged. • For each custom field defined in the form, an appropriate validation is performed based on the data type specified: ♦ **List (custom):** Validated against the code **value**, not the **long name**, for the list item ♦ **Date:** Must be a valid date, in the following format YYYYMMDD ♦ **Boolean:** Value must be Y or N ♦ **Numeric:** Value must be a number ♦ **Text:** Value must be less than or equal to max_length and pass whatever validation is specified for the field.	

Below is a sample of the 100 records in the data file.

```
100,33,BUSGUEST,USD,Smith,Sam,ACME,President,N,45,,,,,,,,,,,,,,,,,,,,
100,34,BUSGUEST,USD,Jones,John,ACME,VP,N,33,,,,,,,,,,,,,,,,,,,
```

Record Type 200 – Employee-Attendee Map Fields

Map records add or remove an existing attendee on the individual user's Favorite Attendees list.

This is a data-entry convenience for the user to allow the company to add the attendee to the user's favorites - it does not mark the attendee as owned by that employee and the employee will be able to *use* but not *edit* that attendee.

Table 2: Data for Record Type 200 – Employee-Attendee Map Fields

Name	Definition	Required?	Description	Client Field Definition
Record Type	200	Y		
Employee ID	48 characters maximum	Y	Defines the employee ID used to look up the employee for the record	

Name	Definition	Required?	Description	Client Field Definition
Attendee External ID	48 characters maximum	Y	Defines the external ID used to look up the attendee for the record; must be unique	
Delete	1 character; Y or N	N	If null or N, the attendee should be added to the employee's **My Attendees** list or validated as already present. If set to Y, the existing employee-attendee map record will be marked as inactive.	

Below is a sample of the 200 records in the data file.

```
200,UserID-1,33,N
200,UserID-2,34,N
200,UserID-3,40,N
```

Sample Data File (Complete)

Here is a sample of the entire file (100 and 200 records).

```
100,33,BUSGUEST,USD,Smith,Sam,ACME,President,N,45,,,,,,,,,,,,,,,,,,
100,34,BUSGUEST,USD,Jones,John,ACME,VP,N,33,,,,,,,,,,,,,,,,,,
200,UserID-1,33,N
200,UserID-2,34,N
200,UserID-3,40,N
```

Section 6: Step 2: Move the Import Data File to Concur

When the file is complete and the client is ready to submit the import data file, the client works with Concur Client Services to move the import data file to Concur.

New clients have most imports set up as part of implementation. Existing clients who want to use this import must contact SAP Concur support for assistance.

NOTE: Clients can confirm whether or not an import schedule has been set up. A user assigned the Import/Extract Monitor role can view the import definitions and schedules that are configured for the entity.

Section 7: Step 3: Concur Imports the Data

On a pre-determined schedule, Concur runs the job that loads the import data file into the client's database. When the process is complete, Concur notifies the client by means of an automated job success email that the locations information has been updated. The changes are immediately available to users.

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