Shared: Attendee Administrator

User Guide

Last Revised: March 7, 2022

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
March 7, 2022	Updated Permissions section
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
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
March 21, 2019	Changed the term "payment request" to "invoice" where applicable; no other content changes.
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.
January 26, 2018	Updated the copyright; no other changes; cover date not updated.
December 15, 2016	Changed copyright and cover; no other content changes.
January 8, 2016	Changed from an Expense guide to a Shared guide; no other content changes.
February 11, 2015	Removed references to the current UI; no other content changes.
January 16, 2015	Updated the screen shots to the enhanced UI; no other content changes.
October 14, 2014	Added information about the two user interfaces; no other content changes.
June 14, 2013	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.
April 3, 3012	Removed all references to the *legacy* Authorization Request feature in Concur Expense. Changed any references to Concur's Travel Request service to either Request or to Authorization Request, depending on the situation. No other content changes.
December 28, 2012	Made rebranding and/or copyright changes; no content changes.
August 17, 2012	The Attendee Type value can be changed for an attendee if the attendee is not associated with a report with a status of Submitted.
March 23. 2012	New manual.

Attendee Administrator

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.

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: 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.

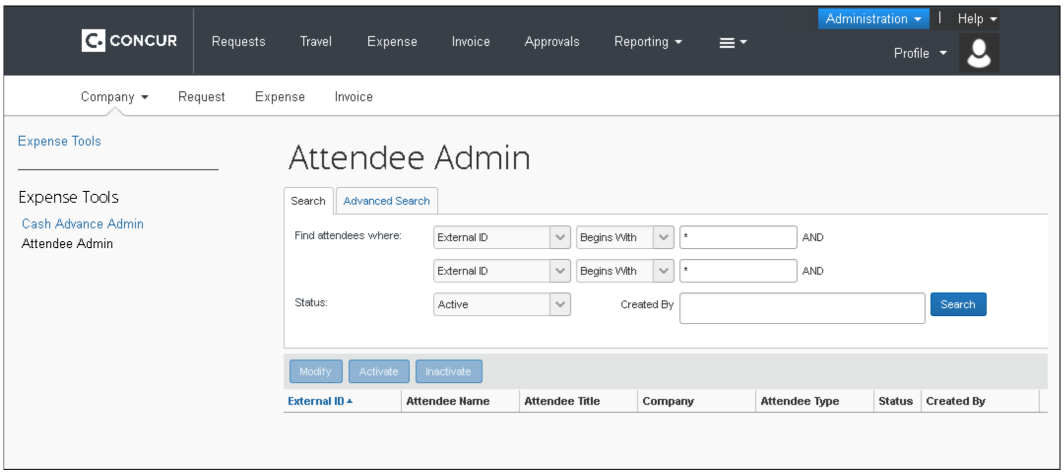
Section 3: Manage Attendees

Access the Attendee Admin Page

The **Attendee Admin** page is available on the **Administration** menu.

To access the Attendee Admin page:

1. Click **Administration** > **Company** > **Tools**.
2. In the left menu, click **Attendee Admin**.



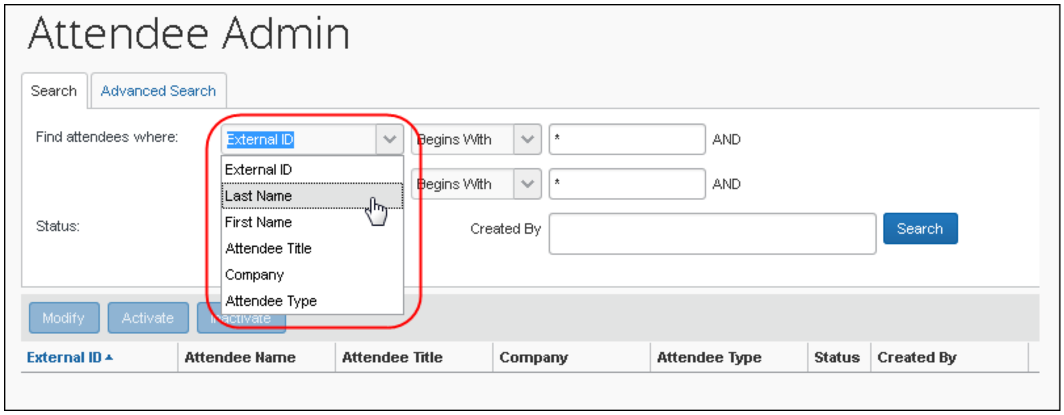
- Use the **Search** tab by using predefined criteria to search for attendees
- Use the **Advanced Search** tab to search for attendees using more specific criteria in a search by form approach.
- Use **Modify** to make changes to the attendee.
- Use **Activate** or **Inactivate** to change the status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

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

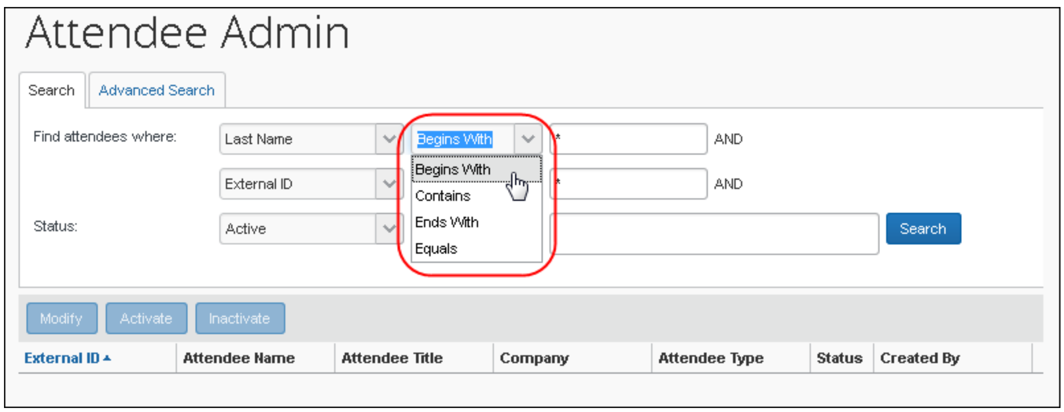
Search for Attendees

To search for attendees using simple criteria:

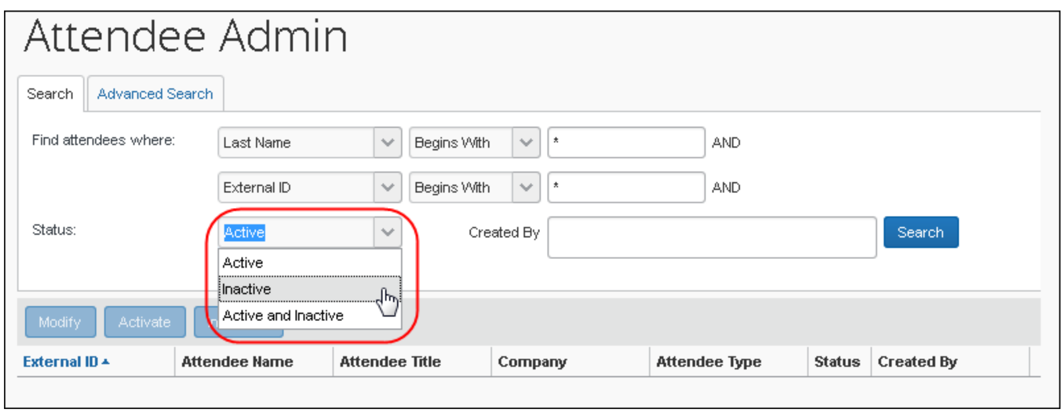
1. On the **Search** tab, select the criteria you want to search for, for example, by *Last Name*, *First Name*, etc. To further refine your search, add additional criteria to the second search line; for example, *External ID*, *Last Name*, etc.



2. For a more targeted search, make a selection in the following list and enter the desired search text.

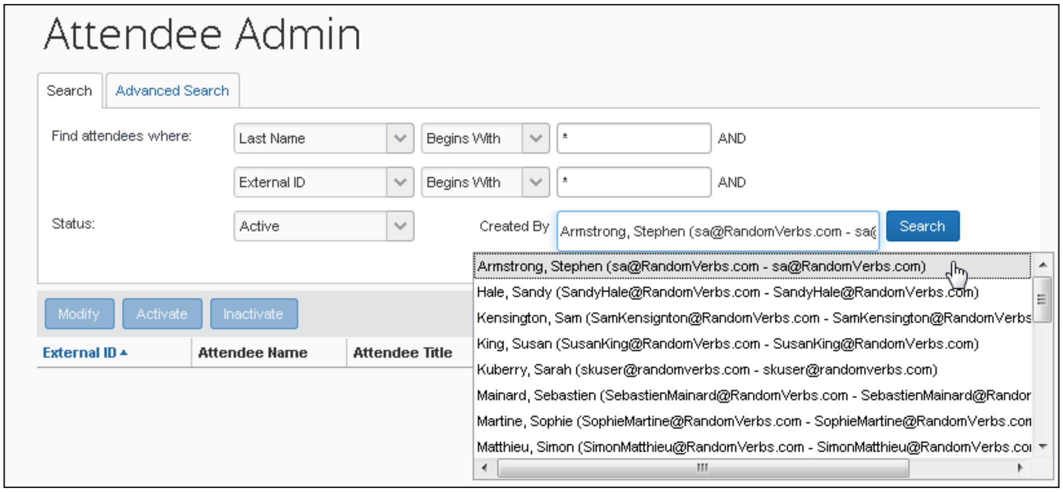


3. From the **Status** list, select *Active*, *Inactive*, or *Active and Inactive*.

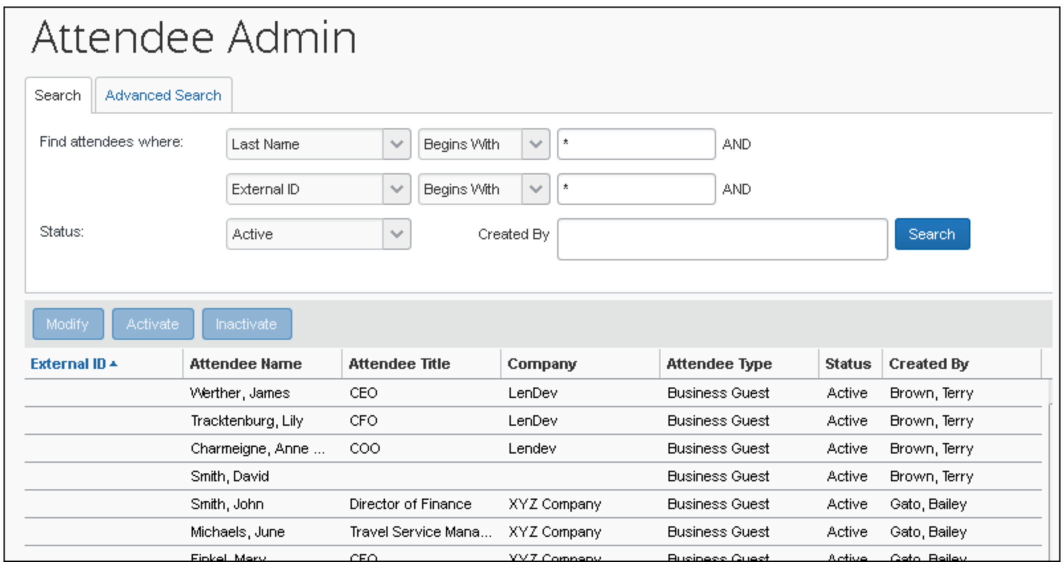


4. To search by who created the attendees, in the **Created By** field, start entering the name.

   A list of names displays. Select the appropriate name.

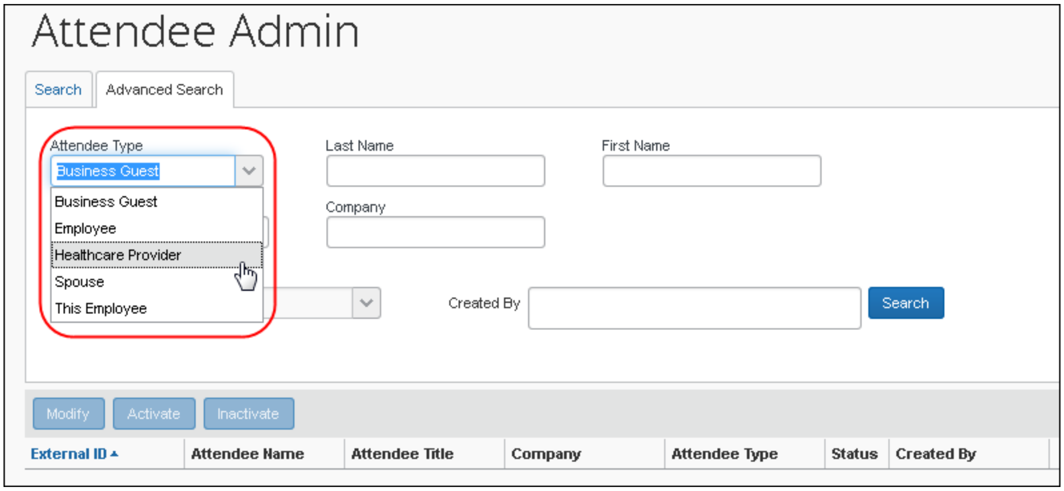


5. Click **Search**. The list of attendees displays.



To perform an advanced search for attendees:

1. On the **Advanced Search** tab, select the desired attendee type.

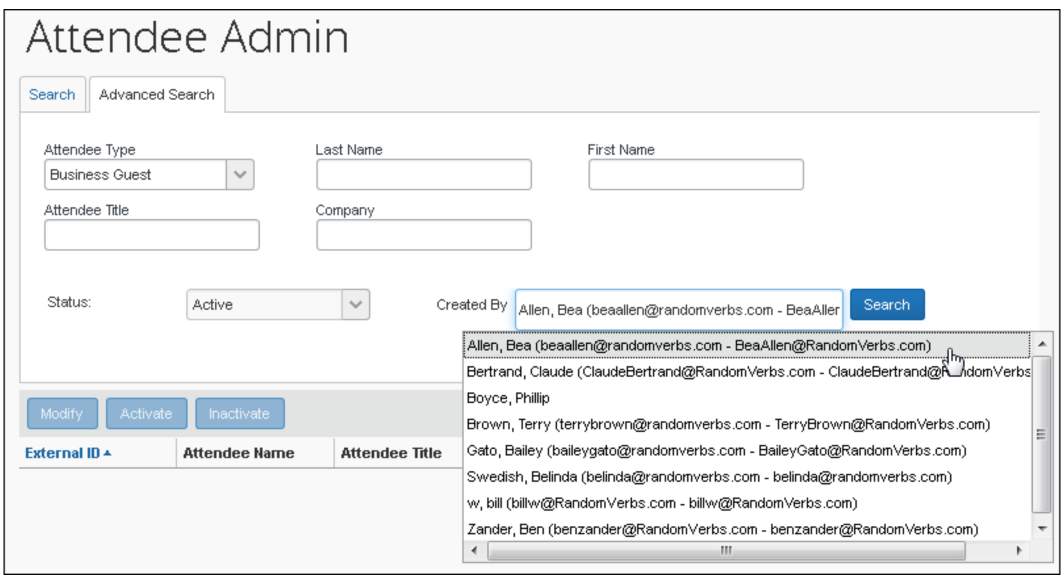


2. Enter additional information to limit the search results to the appropriate attendee records. A full set of form fields for the attendee is available for entering search criteria.

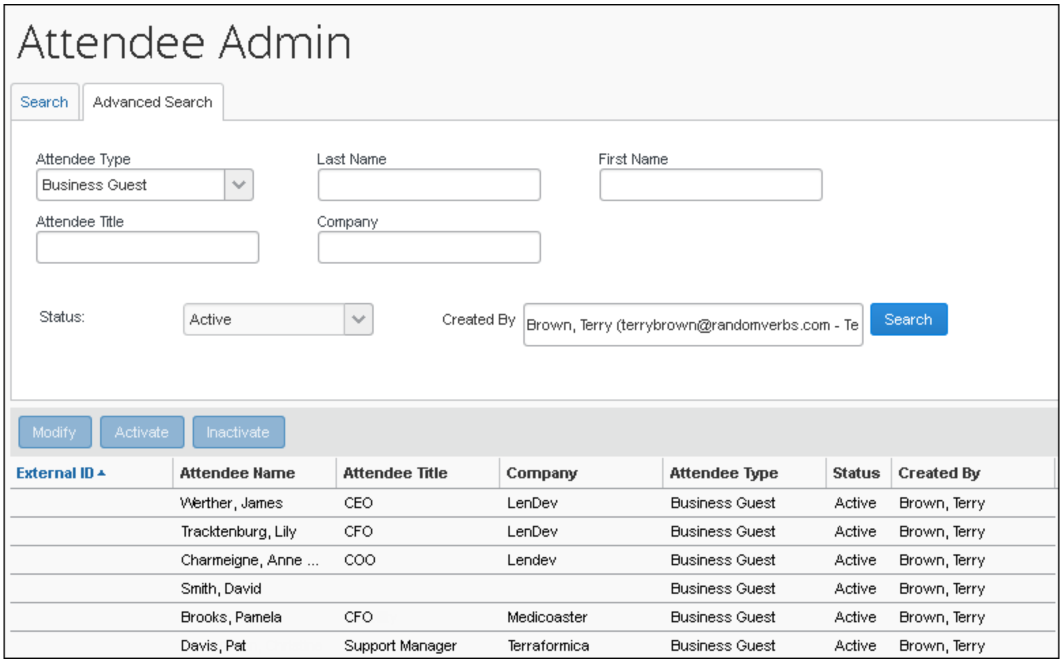
3. From the **Status** list, select *Active*, *Inactive*, or *Active and Inactive*.

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.

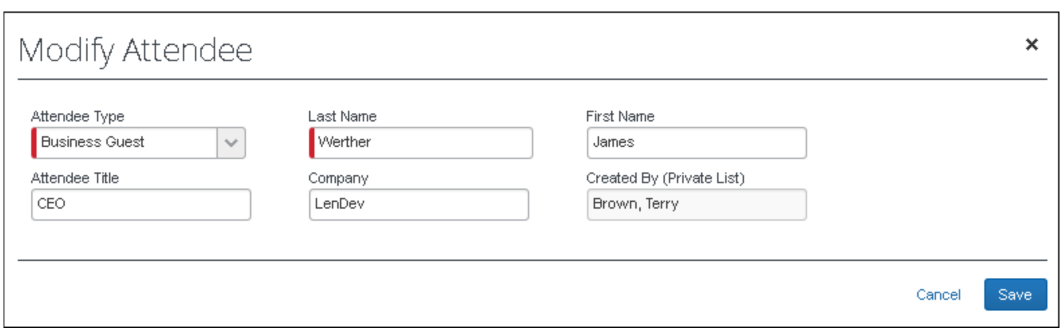


Modify Attendees

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

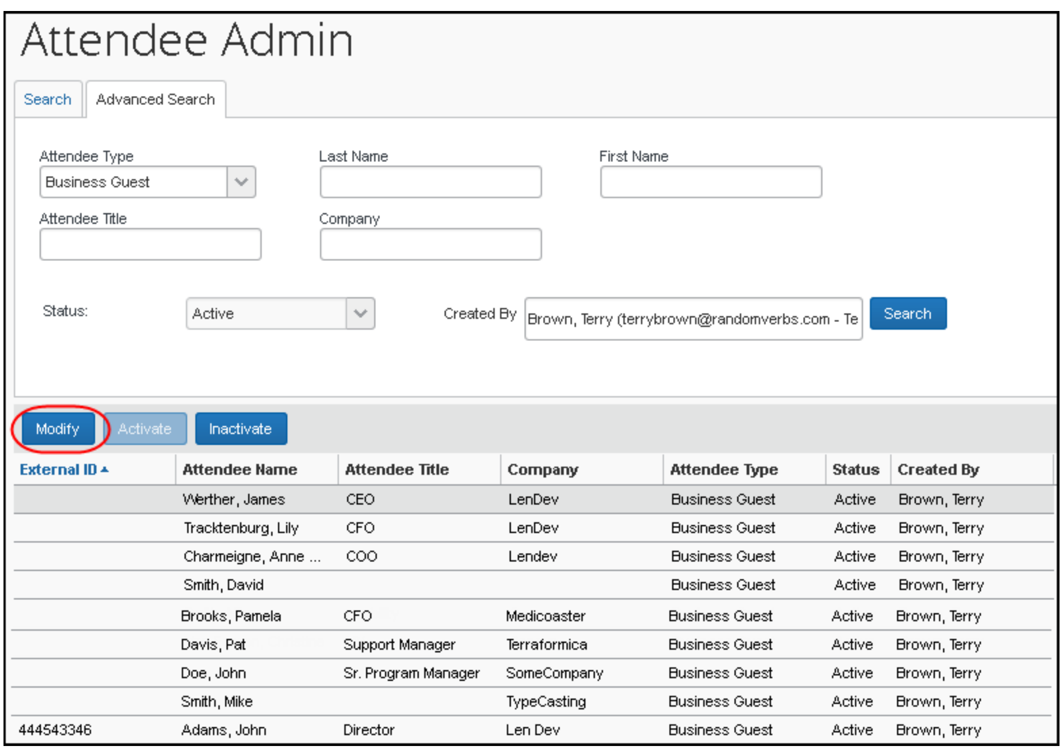
▶ *To view an attendee:*

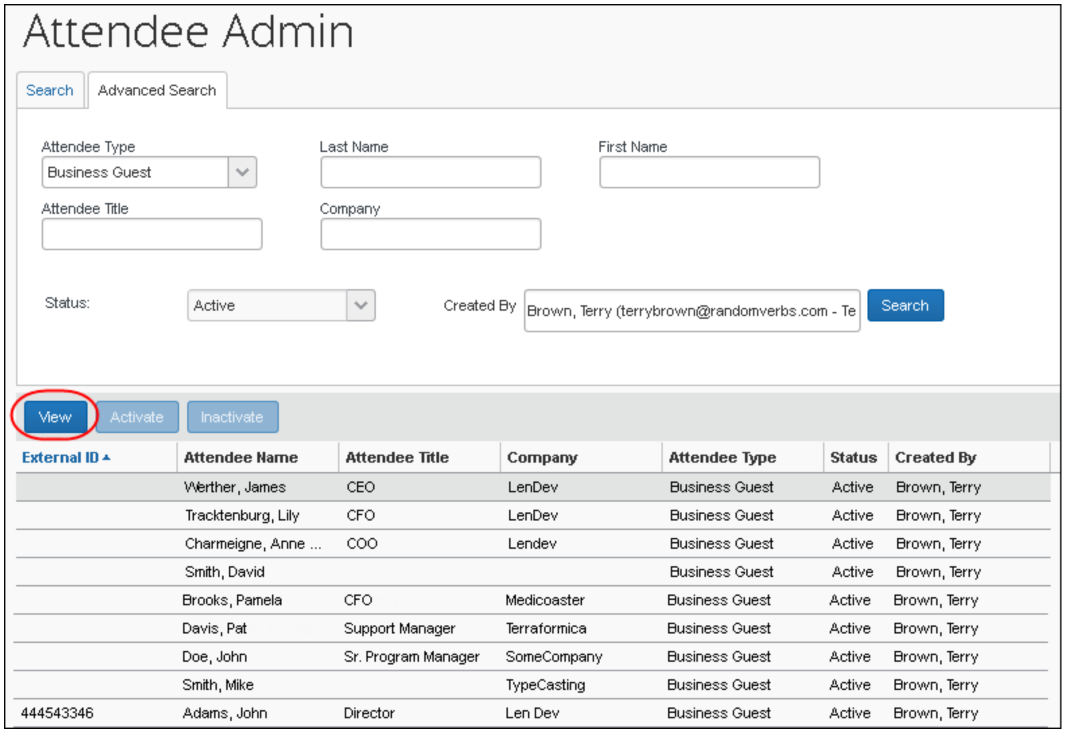
1. Either:
   - Select the desired attendee and click **Modify** if you have the Attendee Administrator role or **View** if you have the Attendee Administrator (Read Only) role.

     – or -

   - Double-click the attendee name.

   Depending on your role, the **Modify/View Attendee** window displays.





2. When you are finished, click **Done**.

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