

# **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, 2012	Removed all references to the <i>legacy</i> 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

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**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**.

The screenshot shows the Concur Attendee Admin page. The top navigation bar includes 'CONCUR' and various menu items like 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', and 'Administration'. The left sidebar shows 'Expense Tools' and 'Attendee Admin'. The main content area has a search bar with 'Search' and 'Advanced Search' tabs. Below the tabs are search criteria fields: 'Find attendees where:', 'External ID', 'Begins With', and 'Status'. There are also buttons for 'Modify', 'Activate', and 'Inactivate'. At the bottom, there is a table with columns: External ID, Attendee Name, Attendee Title, Company, Attendee Type, Status, and Created By.

- ◆ 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

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

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### 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.

Attendee Admin

Search **Advanced Search**

Find attendees where: **External ID** **Begins With** \* AND

**Last Name** **Begins With** \* AND

Status: **Active** Created By  **Search**

**Modify** **Activate** **Inactivate**

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
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- For a more targeted search, make a selection in the following list and enter the desired search text.

Attendee Admin

Search **Advanced Search**

Find attendees where: **Last Name** **Begins With** \* AND

**External ID** **Begins With** \* AND

Status: **Active** **Contains** **Ends With** **Equals**  **Search**

**Modify** **Activate** **Inactivate**

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
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- From the **Status** list, select *Active*, *Inactive*, or *Active and Inactive*.

Attendee Admin

Search **Advanced Search**

Find attendees where: **Last Name** **Begins With** \* AND

**External ID** **Begins With** \* AND

Status: **Active** **Active** **Inactive** **Active and Inactive**  **Search**

**Modify** **Activate** **Inactivate**

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
---------------	---------------	----------------	---------	---------------	--------	------------

- 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.

### Attendee Admin

Search

Advanced Search

Find attendees where:

Last Name

Begins With

\*

AND

External ID

Begins With

\*

AND

Status:

Active

Created By

Armstrong, Stephen (sa@RandomVerbs.com - sa@RandomVerbs.com)

Search

Modify

Activate

Inactivate

External ID ▲	Attendee Name	Attendee Title
	Armstrong, Stephen (sa@RandomVerbs.com - sa@RandomVerbs.com)	
	Hale, Sandy (SandyHale@RandomVerbs.com - SandyHale@RandomVerbs.com)	
	Kensington, Sam (SamKensington@RandomVerbs.com - SamKensington@RandomVerbs.com)	
	King, Susan (SusanKing@RandomVerbs.com - SusanKing@RandomVerbs.com)	
	Kuberry, Sarah (skuser@randomverbs.com - skuser@randomverbs.com)	
	Mainard, Sebastien (SebastienMainard@RandomVerbs.com - SebastienMainard@RandomVerbs.com)	
	Martine, Sophie (SophieMartine@RandomVerbs.com - SophieMartine@RandomVerbs.com)	
	Matthieu, Simon (SimonMatthieu@RandomVerbs.com - SimonMatthieu@RandomVerbs.com)	

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

### Attendee Admin

Search

Advanced Search

Find attendees where:

Last Name

Begins With

\*

AND

External ID

Begins With

\*

AND

Status:

Active

Created By

Search

Modify

Activate

Inactivate

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
	Werther, James	CEO	LenDev	Business Guest	Active	Brown, Terry
	Tracktenburg, Lily	CFO	LenDev	Business Guest	Active	Brown, Terry
	Charmeigne, Anne ...	COO	LenDev	Business Guest	Active	Brown, Terry
	Smith, David			Business Guest	Active	Brown, Terry
	Smith, John	Director of Finance	XYZ Company	Business Guest	Active	Gato, Bailey
	Michaels, June	Travel Service Mana...	XYZ Company	Business Guest	Active	Gato, Bailey
	Finkel, Mary	CEO	XYZ Company	Business Guest	Active	Gato, Bailey

► **To perform an advanced search for attendees:**

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



The screenshot shows the 'Attendee Admin' interface. At the top, there are tabs for 'Search' and 'Advanced Search'. Below the tabs, there's a section for search criteria. The 'Attendee Type' dropdown menu is highlighted with a red circle, showing options: Business Guest, Employee, Healthcare Provider, Spouse, and This Employee. To the right of this dropdown are input fields for 'Last Name', 'First Name', and 'Company'. Below these is a 'Created By' field with a dropdown arrow. A 'Search' button is located to the right of the 'Created By' field. At the bottom of the form, there are three buttons: 'Modify', 'Activate', and 'Inactivate'. Below these buttons is a table header with columns: 'External ID', 'Attendee Name', 'Attendee Title', 'Company', 'Attendee Type', 'Status', and 'Created By'.

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.

This screenshot shows the 'Attendee Admin' interface after a search has been initiated. The 'Attendee Type' dropdown is now set to 'Business Guest'. The 'Status' dropdown is set to 'Active'. The 'Created By' field contains the text 'Allen, Bea (beaallen@randomverbs.com - BeaAllen@RandomVerbs.com)'. A dropdown menu is open below this field, displaying a list of names and email addresses. The list includes: Allen, Bea (beaallen@randomverbs.com - BeaAllen@RandomVerbs.com), Bertrand, Claude (ClaudeBertrand@RandomVerbs.com - ClaudeBertrand@RandomVerbs.com), Boyce, Phillip, Brown, Terry (terrybrown@randomverbs.com - TerryBrown@RandomVerbs.com), Gato, Bailey (baileygato@randomverbs.com - BaileyGato@RandomVerbs.com), Swedish, Belinda (belinda@randomverbs.com - belinda@randomverbs.com), W, bill (billw@RandomVerbs.com - billw@RandomVerbs.com), and Zander, Ben (benzander@RandomVerbs.com - benzander@RandomVerbs.com). The 'Search' button is highlighted in blue. At the bottom, the same table header is visible: 'External ID', 'Attendee Name', 'Attendee Title', 'Company', 'Attendee Type', 'Status', and 'Created By'.

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

## Attendee Admin

Search
Advanced Search

Attendee Type

Last Name

First Name

Attendee Title

Company

Status:

Created By: Brown, Terry (terrybrown@randomverbs.com - Te
 Search

Modify
Activate
Inactivate

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
	Werther, James	CEO	LenDev	Business Guest	Active	Brown, Terry
	Trackdenburg, Lily	CFO	LenDev	Business Guest	Active	Brown, Terry
	Charmeigne, Anne ...	COO	LenDev	Business Guest	Active	Brown, Terry
	Smith, David			Business Guest	Active	Brown, Terry
	Brooks, Pamela	CFO	Medicoaster	Business Guest	Active	Brown, Terry
	Davis, Pat	Support Manager	Terraformica	Business Guest	Active	Brown, Terry

## 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.

### Modify Attendee ×

Attendee Type

Last Name

First Name

Attendee Title

Company

Created By (Private List)

Cancel
Save

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.

### Attendee Admin

Attendee Type  
Business Guest

Last Name

First Name

Attendee Title

Company

Status: Active

Created By: Brown, Terry (terrybrown@randomverbs.com - Te

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
	Werther, James	CEO	LenDev	Business Guest	Active	Brown, Terry
	Tracktenburg, Lily	CFO	LenDev	Business Guest	Active	Brown, Terry
	Charmeigne, Anne ...	COO	LenDev	Business Guest	Active	Brown, Terry
	Smith, David			Business Guest	Active	Brown, Terry
	Brooks, Pamela	CFO	Medicoaster	Business Guest	Active	Brown, Terry
	Davis, Pat	Support Manager	Terraformica	Business Guest	Active	Brown, Terry
	Doe, John	Sr. Program Manager	SomeCompany	Business Guest	Active	Brown, Terry
	Smith, Mike		TypeCasting	Business Guest	Active	Brown, Terry
444543346	Adams, John	Director	Len Dev	Business Guest	Active	Brown, Terry

## Section 3: Manage Attendees

### Attendee Admin

[Search](#) [Advanced Search](#)

Attendee Type  

Business Guest

Last Name

First Name

Attendee Title

Company

Status: 

Active

Created By: Brown, Terry (terrybrown@randomverbs.com - Te

Search

View

Activate

Inactivate

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
	Werther, James	CEO	LenDev	Business Guest	Active	Brown, Terry
	Tracktenburg, Lily	CFO	LenDev	Business Guest	Active	Brown, Terry
	Charmeigne, Anne ...	COO	LenDev	Business Guest	Active	Brown, Terry
	Smith, David			Business Guest	Active	Brown, Terry
	Brooks, Pamela	CFO	Medicoaster	Business Guest	Active	Brown, Terry
	Davis, Pat	Support Manager	Terraformica	Business Guest	Active	Brown, Terry
	Doe, John	Sr. Program Manager	SomeCompany	Business Guest	Active	Brown, Terry
	Smith, Mike		TypeCasting	Business Guest	Active	Brown, Terry
444543346	Adams, John	Director	Len Dev	Business Guest	Active	Brown, Terry

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

