

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
- Authorization Request
 - Professional/Premium edition
 - Standard edition

Table of Contents

Section 1: Permissions	1
Section 2: Overview	1
Section 3: Manage Attendees	1
Access the Attendee Admin Page.....	1
Search for Attendees	2
Modify Attendees	5
Activate or Inactivate Attendees.....	6
View Attendees	6

Revision History

Date	Notes/Comments/Changes
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	<p>Removed all references to the <i>legacy</i> Authorization Request feature in Concur Expense.</p> <p>Changed any references to Concur's Travel Request service to either Request or to Authorization Request, depending on the situation.</p> <p>No other content changes.</p>
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

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.

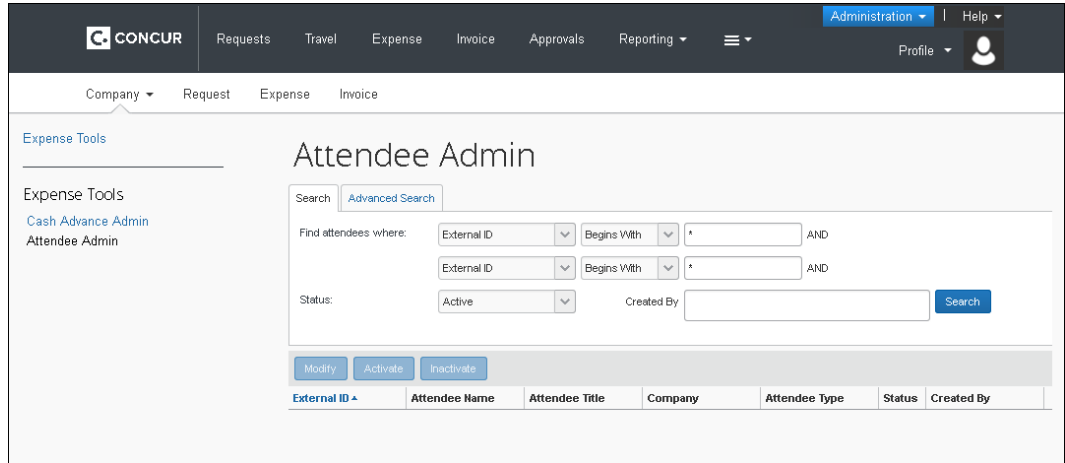
Section 3: Manage Attendees

Access the Attendee Admin Page

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

► **To access the Attendee Admin page:**

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



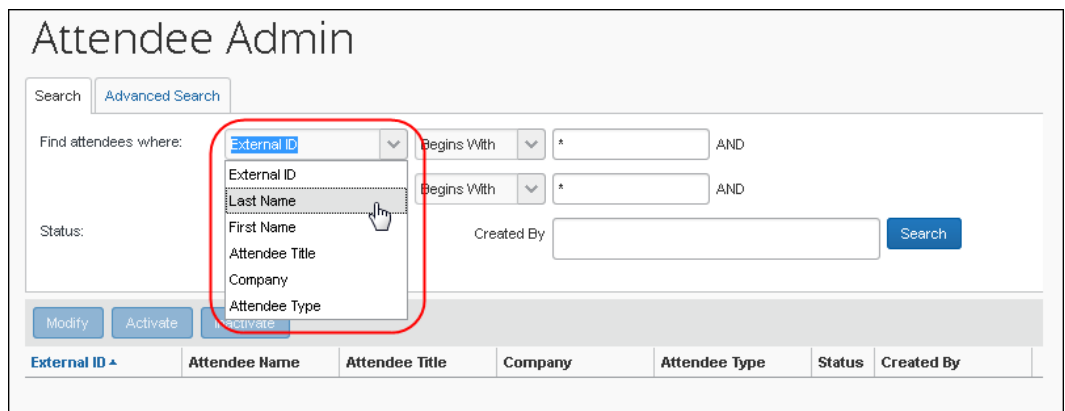
- ◆ Use the **Search** tab by using predefined criteria to search for attendees
- ◆ Use the **Advanced Search** tab to search for attendees using more specific criteria in a search by form approach.
- ◆ Use **Modify** to make changes to the attendee.
- ◆ Use **Activate** or **Inactivate** to change the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



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

Attendee Admin

Search

Find attendees where: Last Name * AND

External ID * AND

Status: Active

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

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

Attendee Admin

Search

Find attendees where: Last Name * AND

External ID * AND

Status: Created By

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

Find attendees where: Last Name * AND

External ID * AND

Status: Active Created By: Armstrong, Stephen (sa@RandomVerbs.com - sa@RandomVerbs.com)

External ID ▲	Attendee Name	Attendee Title
---------------	---------------	----------------

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

The screenshot shows the 'Attendee Admin' interface. At the top, there are tabs for 'Search' and 'Advanced Search'. Below this, there are search filters: 'Find attendees where:' with dropdowns for 'Last Name' and 'Begins With' (with an asterisk in a text box), and 'AND'. Another set of filters includes 'External ID' and 'Begins With' (with an asterisk in a text box), and 'AND'. There is also a 'Status:' dropdown set to 'Active' and a 'Created By' text box. A blue 'Search' button is on the right. Below the filters are buttons for 'Modify', 'Activate', and 'Inactivate'. The main part of the interface is a table with the following columns: External ID, Attendee Name, Attendee Title, Company, Attendee Type, Status, and Created By. The table contains several rows of attendee data.

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 with the 'Advanced Search' tab selected. A red box highlights the 'Attendee Type' dropdown menu, which is open and showing options: 'Business Guest', 'Employee', 'Healthcare Provider', 'Spouse', and 'This Employee'. A mouse cursor is pointing at 'Healthcare Provider'. Other search fields include 'Last Name', 'First Name', and 'Company'. There is also a 'Created By' field and a blue 'Search' button. Below the search fields are buttons for 'Modify', 'Activate', and 'Inactivate'. The table header is visible at the bottom: External ID, Attendee Name, Attendee Title, Company, Attendee Type, Status, 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.

Attendee Admin

Search Advanced Search

Attendee Type: Business Guest (dropdown) Last Name: [] First Name: []

Attendee Title: [] Company: []

Status: Active (dropdown) Created By: Allen, Bea (beaallen@randomverbs.com - BeaAllen@RandomVerbs.com) [Search]

Modify Activate Inactivate

External ID ▲	Attendee Name	Attendee Title
	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)	
	Zander, Ben (benzander@RandomVerbs.com - benzander@RandomVerbs.com)	

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

Attendee Admin

Search Advanced Search

Attendee Type: Business Guest (dropdown) Last Name: [] First Name: []

Attendee Title: [] Company: []

Status: Active (dropdown) Created By: Brown, Terry (terrybrown@randomverbs.com - TerryBrown@RandomVerbs.com) [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
	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: Business Guest

Last Name: Werther

First Name: James

Attendee Title: CEO

Company: LenDev

Created By (Private List): Brown, Terry

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

Search Advanced Search

Attendee Type: Business Guest (dropdown) Last Name: [] First Name: []

Attendee Title: [] Company: []

Status: Active (dropdown) Created By: Brown, Terry (terrybrown@randomverbs.com - Te) Search

Modify (circled) 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

Attendee Admin

Search Advanced Search

Attendee Type: Business Guest (dropdown) Last Name: [] First Name: []

Attendee Title: [] Company: []

Status: Active (dropdown) Created By: Brown, Terry (terrybrown@randomverbs.com - Te) Search

View (circled) 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

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