

Concur Attendee/Recipient Functionality

The attendee feature in SAP Concur allows for multiple ways to capture attendees and/or recipients depending on the type of expense reimbursement you are entering.

This document is intended to highlight all the resources specific to the 'attendee' functionality.

The attendee functionality allows for entry of WHO attended business related meals, entertainment, as well as tracking recipients of gifts, awards, and in some cases gift cards.

- All TCU employees will automatically be available to search and add to an expense entry in Concur
- You can add different Types of Attendees – for example Students, Guests or even a Group of Attendees.
 - If adding a 'Student' attendee, a drop-down list of students is available on that attendee form for you to select
 - A 'Group of Attendees' option allows for just including the # of participants when individual names are not available
- Once an attendee is added, they are available for searching/adding to the expense
- A group can be added that allows for the just including the # of participants when individual names are not available
- Users can create their own attendee groups with named individuals for easy selection if that same group is going to be used in future expenses (cohort, department, etc.)
- The attendee feature allows for uploading a template of Guest or Student attendees

Please keep in mind that being a recipient of a gift card may have required tax implications.

Contents

Basic Attendee/Recipient Navigation:	2
Import Attendees	3
Attendee Groups	4

Basic Attendee/Recipient Navigation:

- Click on the **Attendees** link on the expense form and click **ADD**
- The screen that displays is a “**Search for Attendees**”
 1. This will default to Employee where you can find anyone within TCU by entering first name, last name, or email address; or you can change the Attendee Type to Group of Attendees, Guest, or Student to search for attendees you may have already added. [More Information](#)
 2. If your search results do not find who you are looking for, you can click on Create New Attendee in the bottom right. Each attendee type can have different field requirements
 3. You can access Recently Used attendees by clicking on the Recent Attendees tab
 4. If you have created Attendee Groups, you can access those by clicking on the Attendee Groups tab. [More Information](#)
 5. If you want to use the Concur template to upload attendees for selection, you can click on the Import Attendees tab. [More Information](#)

The screenshot shows the 'Add Attendees' search interface. At the top, there are five tabs: 'Attendees' (circled 1), 'Recent Attendees' (circled 3), 'Attendee Groups' (circled 4), 'No Shows', and 'Import Attendees' (circled 5). The 'Attendees' tab is active. Below the tabs, there are several input fields: 'Attendee Type *' (a dropdown menu with 'Employee' selected, circled 1), 'Last Name' (a text input field), 'First Name' (a text input field), 'Email Address' (a text input field), and 'Country/Region' (a dropdown menu with 'Search by Country/Region' selected). There is a checkbox for 'Include inactive employees' and a link for 'Fewer Search Options'. At the bottom right, there are three buttons: 'Search' (with a red arrow pointing to it), 'Reset', and 'Close'. A '* Required field' label is visible in the top right corner.

The screenshot shows the 'Add Attendees' search interface with the 'Attendee Type' dropdown set to 'Student'. The 'Attendee Type *' dropdown is circled 1. The 'Last Name' and 'Affiliation / School ?' text input fields are circled 2. Below the 'Affiliation / School ?' field, there is a link that says 'Can't find an attendee? Create New Attendee'. At the bottom right, there are three buttons: 'Search', 'Reset', and 'Close'. A '* Required field' label is visible in the top right corner.

Import Attendees

- Select **Import Attendees**
- Select **Download the template**
- Open the template from your downloads folder
 1. In column A, enter either GUEST or STUDENT exactly as noted
 2. Enter the Last Name and First Name
 3. If a GUEST, enter information in Column D (Affiliation/School) and Column E (Job Title, Activity)
 4. If a STUDENT, enter the Student ID in column F (if the ID does not match the TCU student list, it will not be able to be added via this upload)

A 1	B 2	C	D 3	E	F 4
Attendee Type (GUEST or STUDENT)	Last Name	First Name	Affiliation / School	Job Title, Activity	Student ID
GUEST	Miller	John	University of Concur	Director	
STUDENT	Adams	Jane			123456789

5. Save the file
6. Click on Upload Spreadsheet
7. Find the file and select Open
8. Concur will display the results, click NEXT
9. Review results, click Close
10. Note how the imported attendee is added to the list of Attendees; if additional attendees are needed – click ADD again and search/create new attendees as relevant

Attendee Groups

Concur supports multiple 'groups' of attendees – you can create your own group of known/named attendees, or you can create an Attendee Group that does not have named individuals.

Group of Attendees – Named individuals

You can create your own 'group' for easier selection if you are frequently entering expenses with the same attendees. Once you have searched and added all your attendees, do the following -

1. Select the attendees by clicking the box to the left
2. Click on Create Group
3. Name your Group, click Save
4. The next time you go to Add attendees, click on Attendee Groups and you'll see the group that you added

Attendees

Business Meals/Hospitality 10+ Attendees | \$111.00

Attendees: 3

Add **Remove** **Create Group** Copy from Request

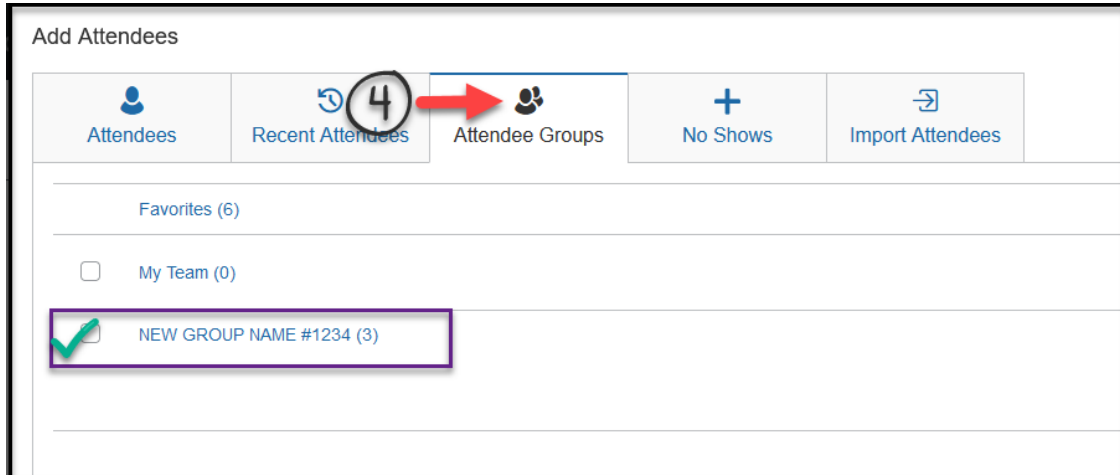
<input type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	Attendee Type
<input checked="" type="checkbox"/>	Miller, [redacted]	[redacted]	[redacted]	Guest
<input checked="" type="checkbox"/>	Smith, [redacted]	[redacted]	[redacted]	Employee
<input checked="" type="checkbox"/>	Smith, [redacted]	[redacted]	[redacted]	Employee

Create Group

Group Name *

NEW GROUP NAME #1234

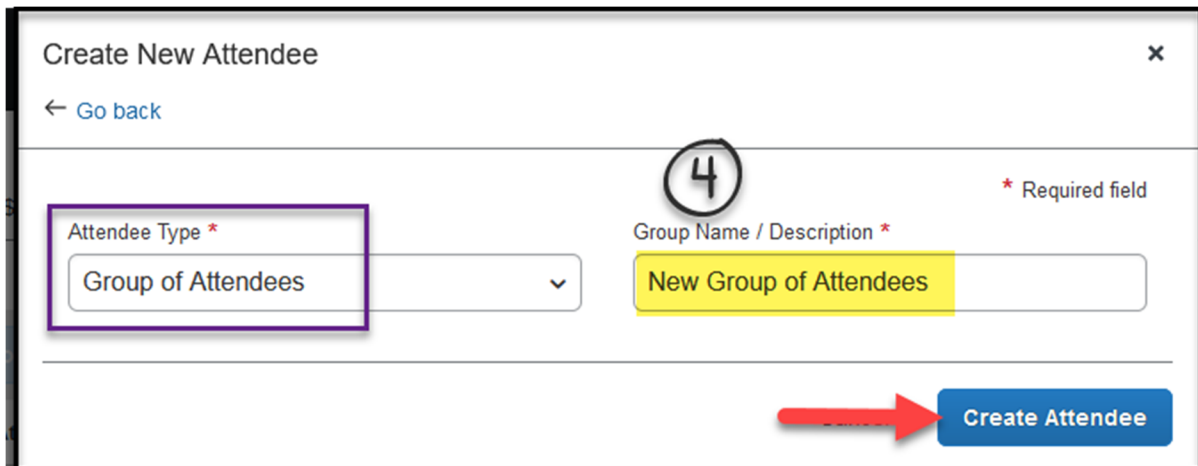
Cancel Save



Group of Attendees – No Named Individuals

To create an Attendee Group that does not have named attendees, click ADD then follow these steps to search for an existing group, or create a new attendee –

1. Click on **Attendee Type** and select **Group of Attendees**
2. Enter the **Group Name** and click on **Search**
3. Depending on search results, either select the appropriate group name, or click on **Create New Attendee**
4. When creating a new “Group of Attendees” type, enter the **Group Name/Description** and click on **Create Attendee**
5. When back at the Attendee form, you can edit the **Attendee Count**



Attendees

Business Meals/Hospitality 10+ Attendees | \$111.00

Attendees: 11

<input type="checkbox"/>	Attendee Name ▲	Attendee Title ↕	Institution/Company ↕	Attendee Type ↕	Attendee Count ↕	Amount ↕
<input type="checkbox"/>	New Group of Attendees			Group of Attendees	11	\$111.00

Additional Attendee Group Resources

[Creating an Attendee Group \(video\)](#)

[Creating a Group of Attendees](#)