Adding Attendees to a Business Meal or Conference Expense

Attendees are no longer managed on the expense page. They are on a separate page, providing more work space for attendees and making the experience clearer and less confusing.

Previous Concur User Interface

In the previous Concur user interface, the Attendees section looked like this.

NextGen Expense – New User Interface

In NextGen Expense, attendees are managed on a separate page.

*Adding Attendees – Typical Process*
Complete the expense and then click **Attendees** on the **New Expense** page.

Just like the previous user interface, the **Attendees** link appears only for the expense types that your company has defined as requiring Attendees, such as for Business Meals and Conferences or Seminars.

The **Attendees** page appears. Note: The employee name for the report automatically appears as an attendee in the Attendees field. If this is the only attendee for the meal/event, check the name and click **Save**.
To add an attendee to an expense, click Add. The Add Attendees window appears; all of the options for adding attendees to the expense are available in this window.

You can choose from recent attendees, add a new attendee, choose from attendee groups (and Favorites), or identify no-shows (if your configuration allows).
CHOOSE FROM RECENTLY USED ATTENDEES

A good place to start is with the **Recent Attendees** tab. Select the check box for the desired attendee(s) and then click **Add To List**. The selected attendees will be added to the expense.

At the bottom of the **Recent Attendees** tab is the **Search All Attendee History** link. Click the link to see all attendees you have ever used - regardless of whether they are in your favorites.

CHOOSE FROM YOUR FAVORITES
To search for an attendee that you have designated as a favorite (in Profile) but who is not available on the Recent Attendees page, click Attendee Groups. The first group is Favorites. Click Favorites. The Favorites window appears.

Select the check box for the desired attendee(s) and then click Add To List.
SEARCH FOR OTHER ATTENDEES

In the following example, assume that you want to add an attendee who is not available on the Recent Attendees tab or in Favorites. The first step is to search for the desired attendee.

Click New Attendee. The Search for Attendee window appears.
Select the appropriate attendee type, and enter the search term (for example, the first few letters of the attendee's last name). Click **Search**.

In the search results that appear, select the check box for the desired attendee and then click **Add To List**.
NOTE: If you do not find the desired attendee in the results, you can click **Modify Search** to modify your search criteria and try again.

CREATE NEW ATTENDEE

If you want to create a new attendee manually (and if you are allowed to by your company's configuration), click **New Attendee > Create New Attendee**.
Complete the **Create New Attendee** window and then click **Create Attendee**.
When done, all attendees appear.
Click **Save** to add the attendees to the expense and return to the expense page.

If you click **Cancel**, a message appears. If you then click **Continue Without Saving**, then the newly added or updated attendees on this page will not be saved to the expense.

**Manage Duplicate Attendees**

When you attempt to add a new attendee and click **Create Attendee** (as described above), Expense immediately searches for duplicates. If Expense finds a duplicate attendee, you are prompted to use the duplicate or to add the new attendee if, in fact, they are not the same person.