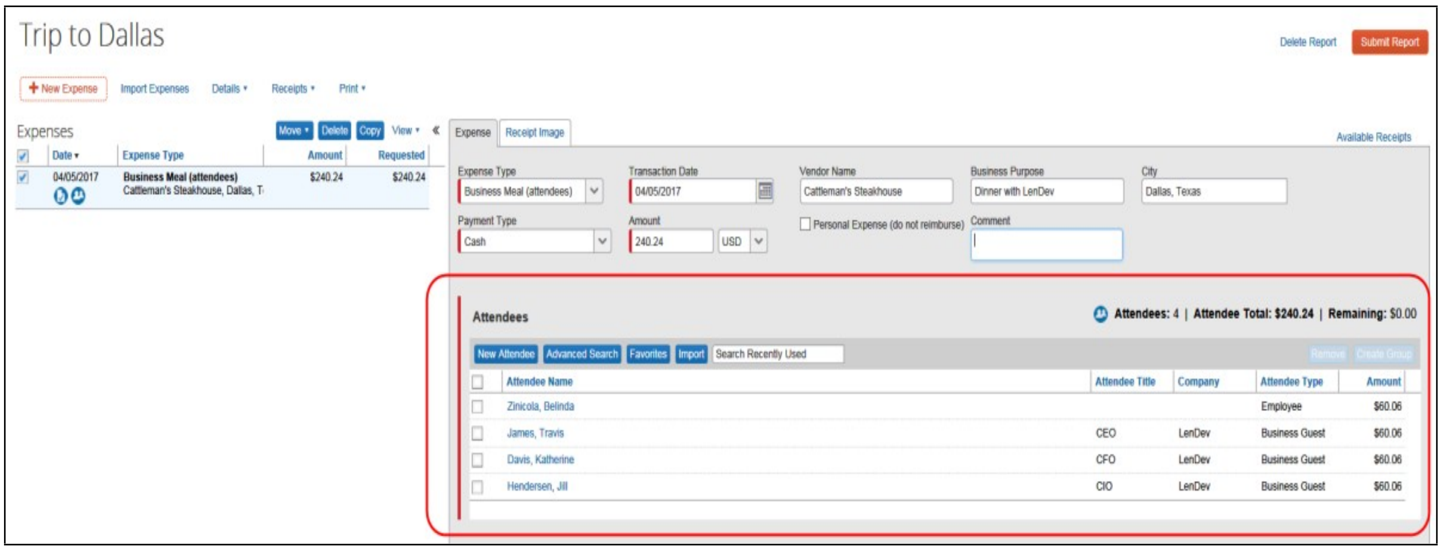
Adding Attendees to a Business Meal or Conference Expense

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.



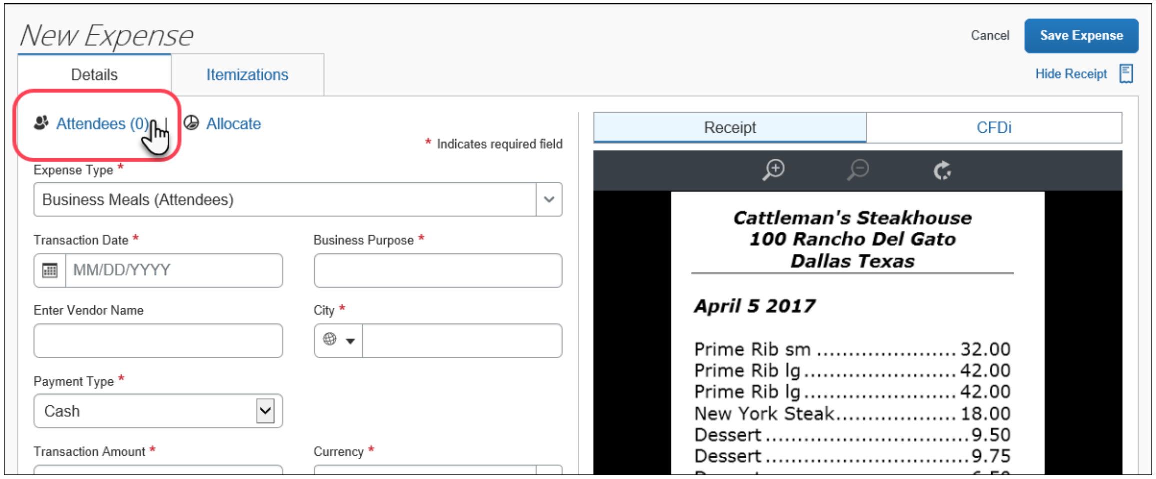
NextGen Expense – New User Interface

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

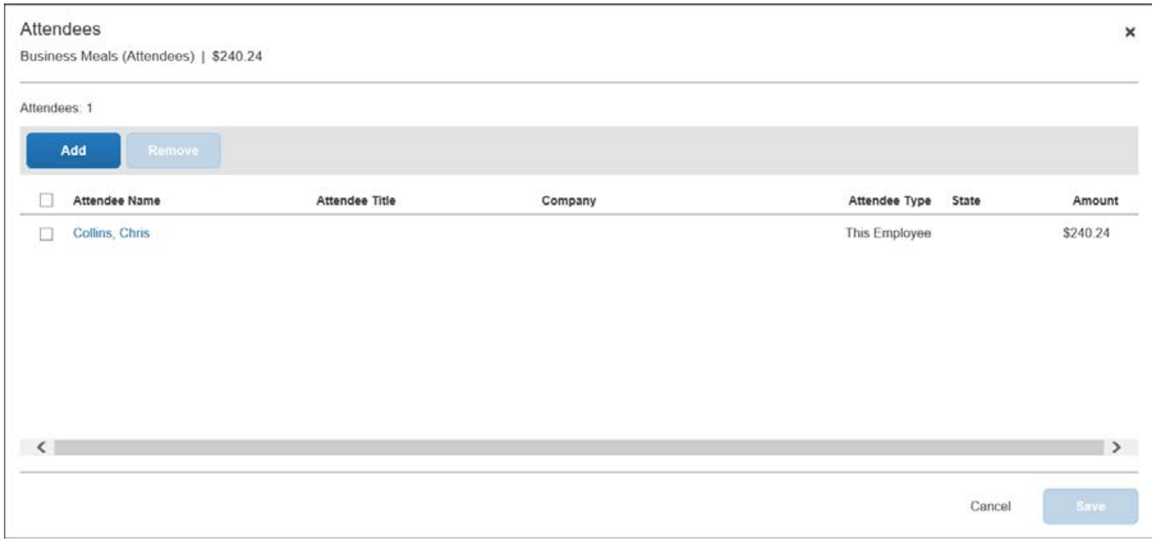
Adding Attendees – Typical Process

Complete the expense and then click **Attendees** on the **New Expense** page.

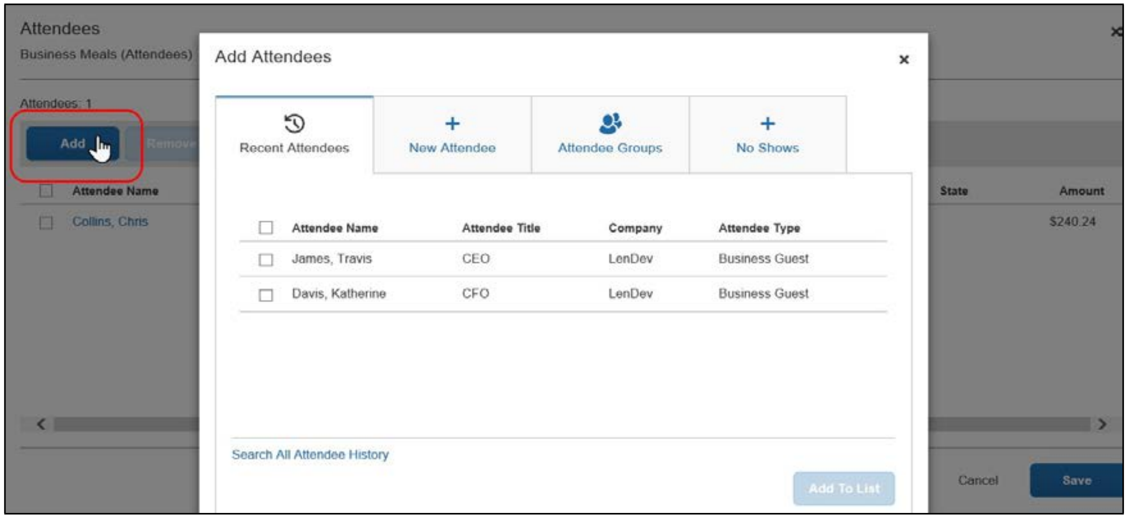
Just like the previous user interface, the **Attendees** link appears only for the expense types that your company has defined as requiring Attendees, such as for Business Meals and Conferences or Seminars.



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.**



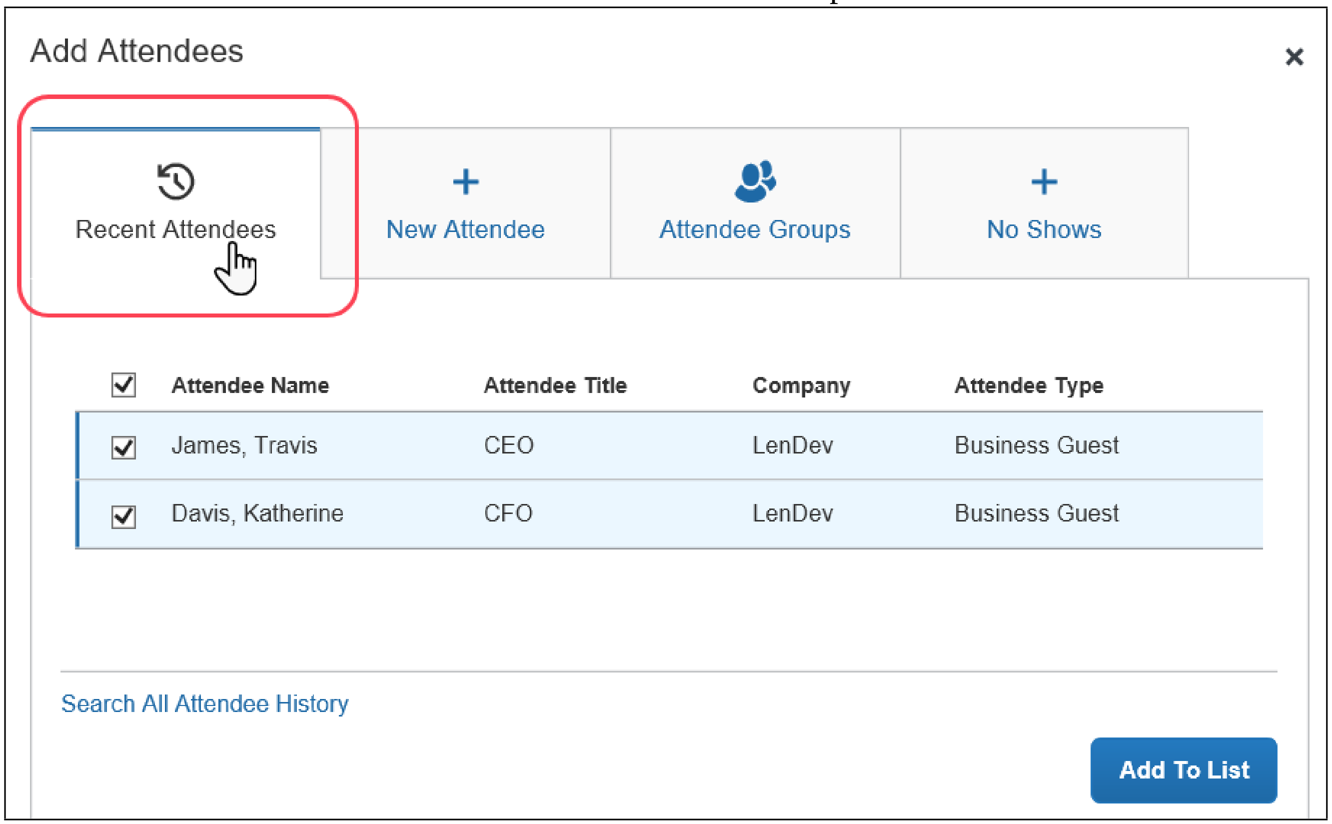
To add an attendee to an expense, click **Add**. The **Add Attendees** window appears; all of the options for adding attendees to the expense are available in this window.



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

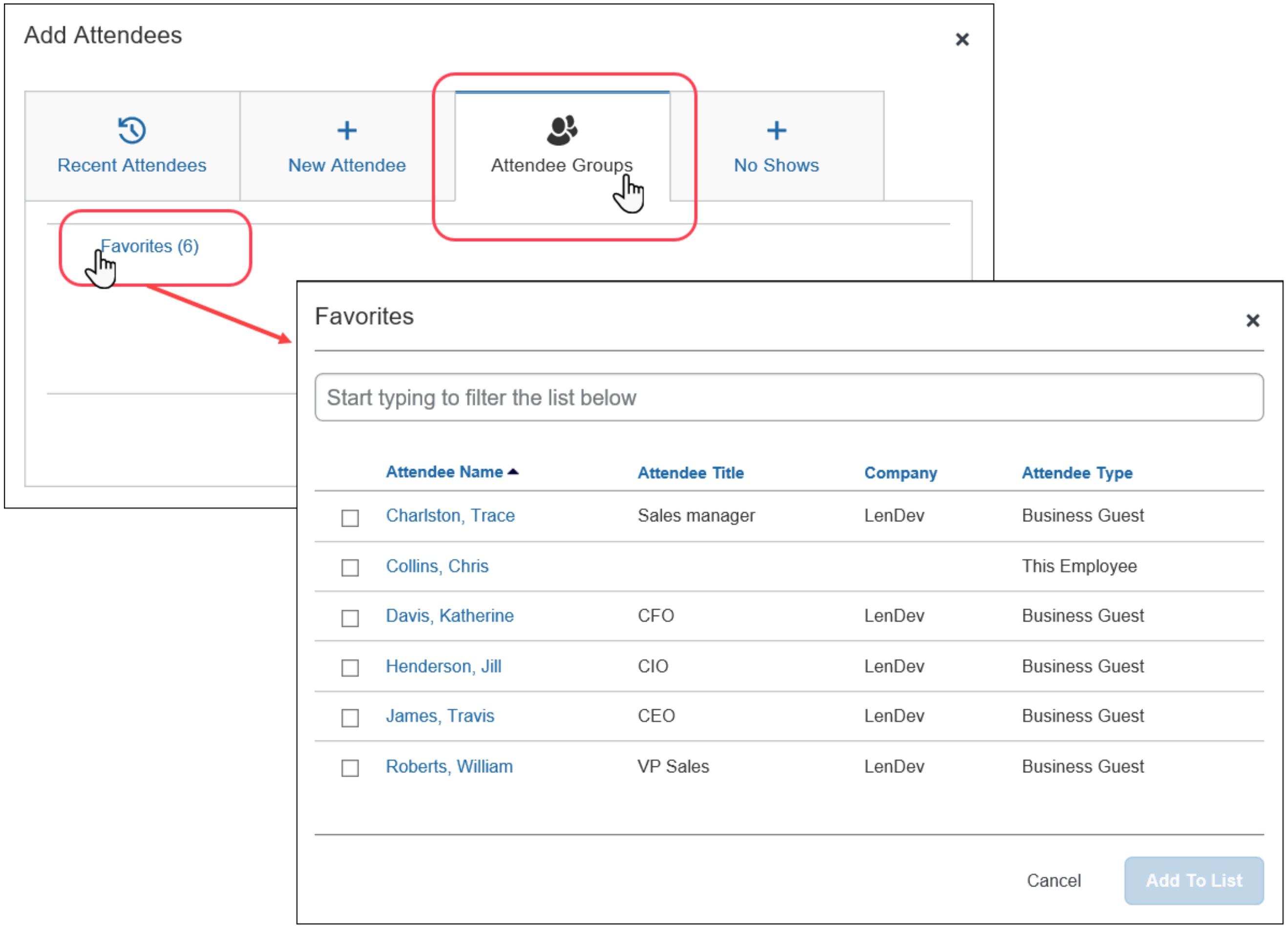
A good place to start is with the **Recent Attendees** tab. Select the check box for the desired attendee(s) and then click **Add To List**. The selected attendees will be added to the expense.



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.

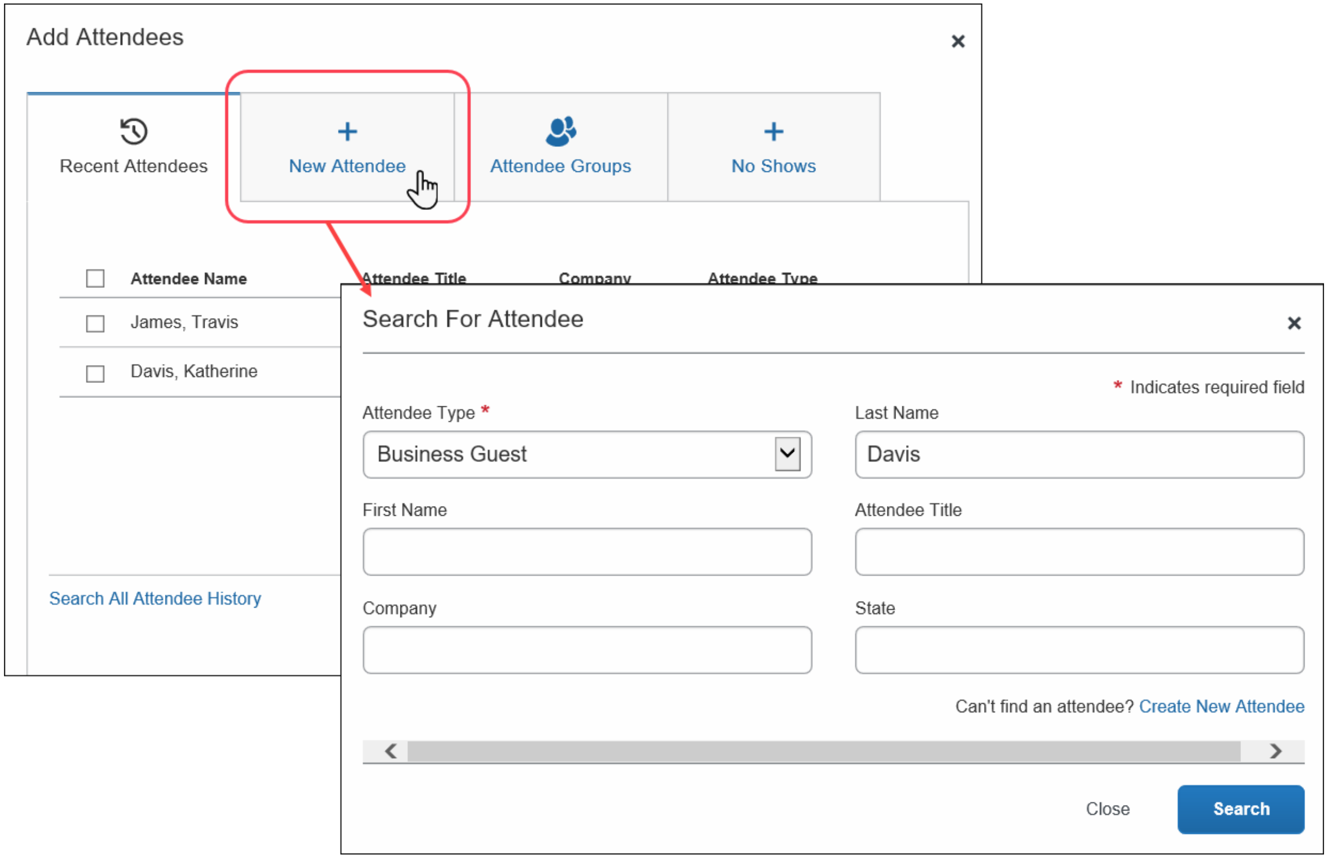


Select the check box for the desired attendee(s) and then click **Add To List**.

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.



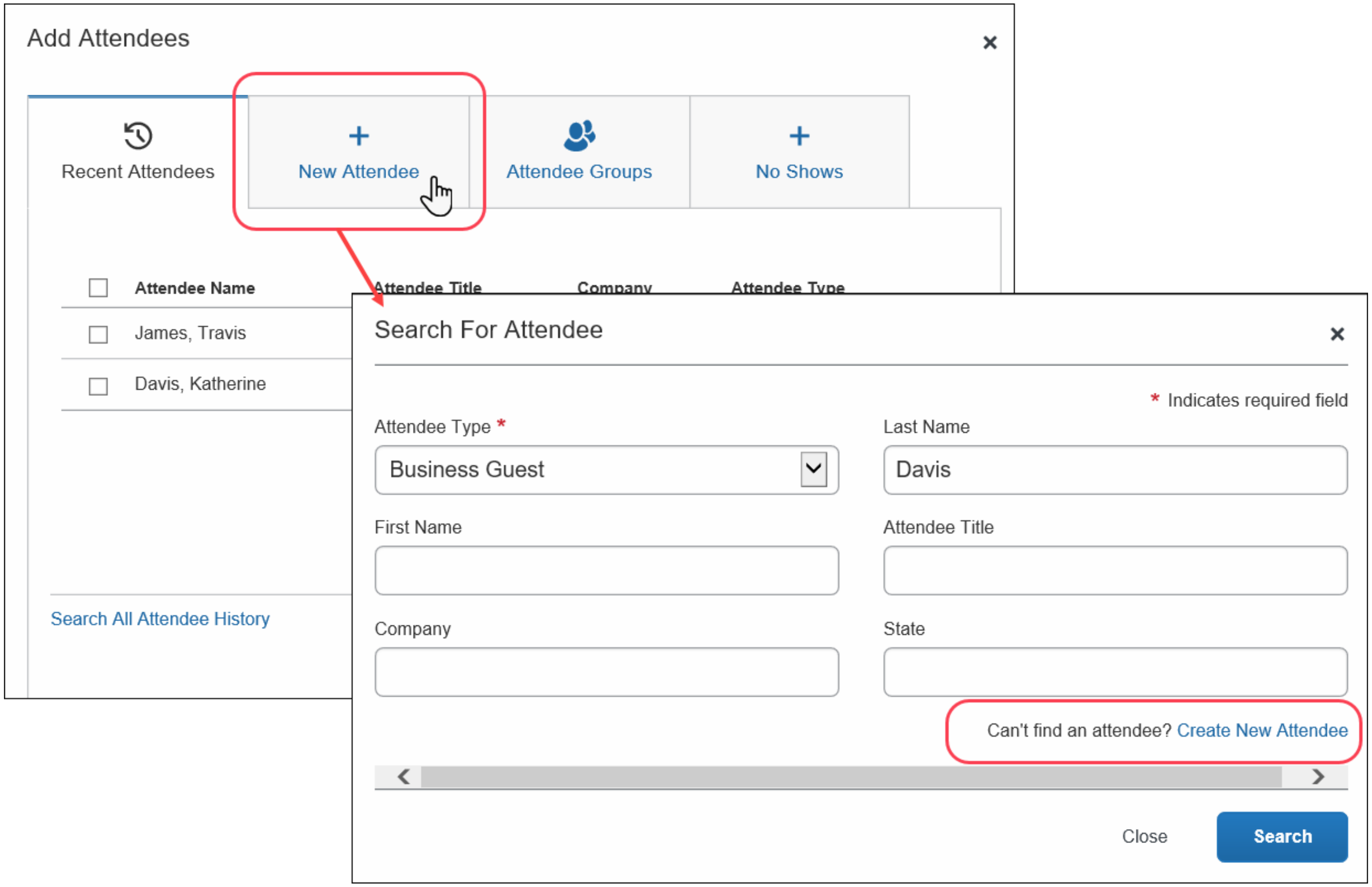
Select the appropriate attendee type, and enter the search term (for example, the first few letters of the attendee's last name). Click **Search**.

In the search results that appear, select the check box for the desired attendee and then click **Add To List**.

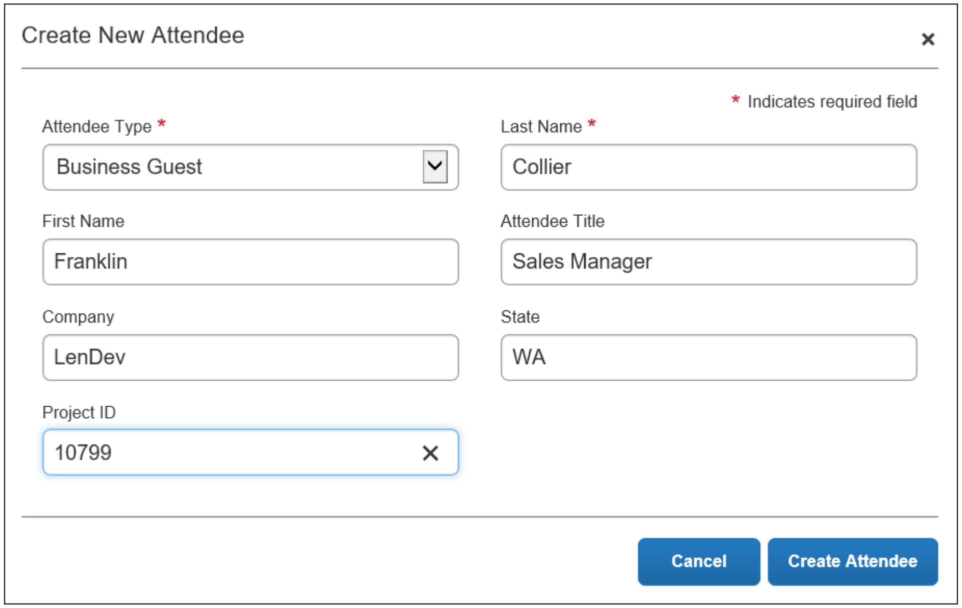
NOTE: If you do not find the desired attendee in the results, you can click **Modify Search** to modify your search criteria and try again.

CREATE NEW ATTENDEE

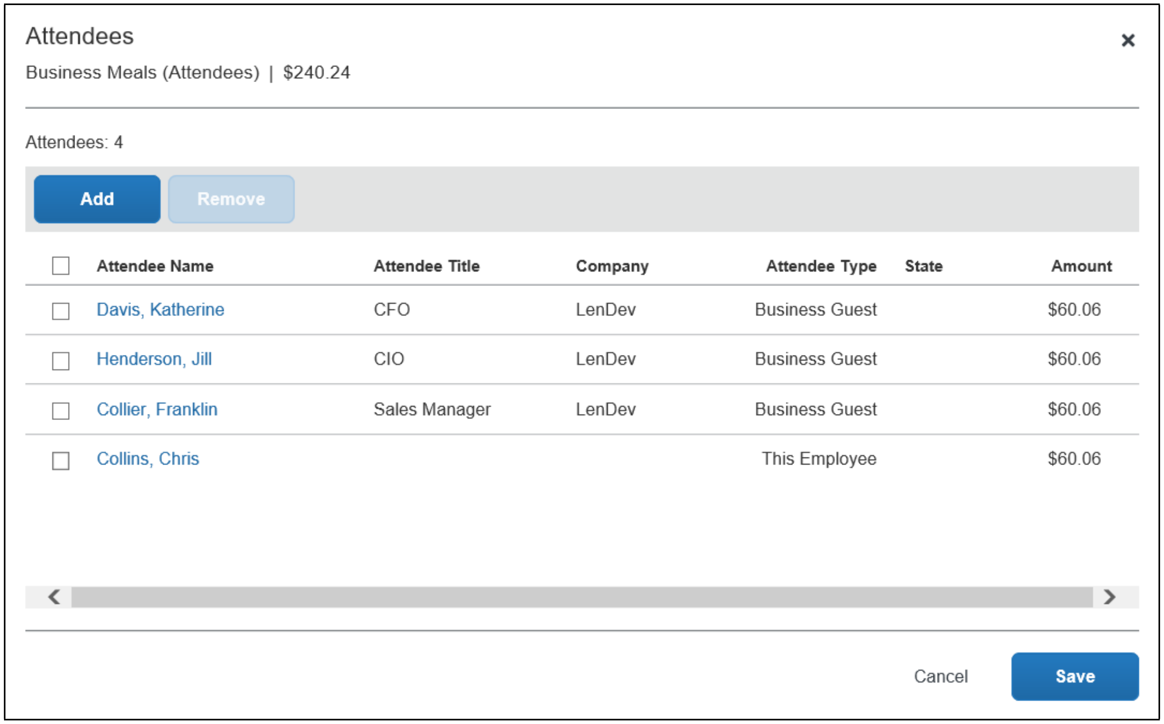
If you want to create a new attendee manually (and if you are allowed to by your company's configuration), click **New Attendee > Create New Attendee**.



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.

Duplicate Attendees Found

×

New Attendee

Kerry Craig

Business Guest

Modify Attendee

Continue Adding New Attendee

Duplicates

	Attendee Name	Attendee Title	Company	Attendee Type
○	Craig, Kerry	CFO	LenDev	Business Guest

Cancel

Add Selected Attendee