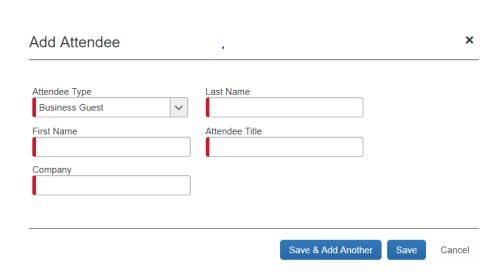# iBuy Expense Reporting Attendee Help Guide

Add an attendee to an expense

There are several ways to add one or more attendees to an expense. You can:

1) Create a **New Attendee** (for Non-Employees, such as Business Guests)
2) Use **Advanced Search** (for Employee attendees and other options)
3) Choose from your **Favorites** (individuals or attendee groups)
4) **Import** attendees

1) Use the **New Attendee** tab for **Non-Employees** only, such as Business Guests:

1. In the **Attendees** section click **New Attendee** to bring up the **Add Attendee** screen
2. Complete the required information.
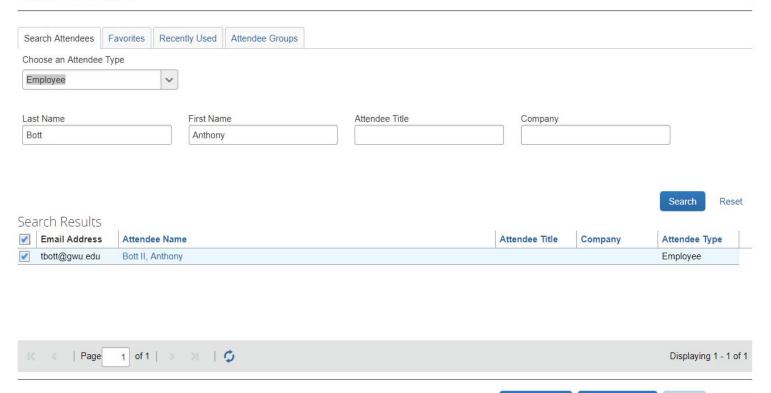3. Click **Save** to add the person to the **Attendees** in your report

2) Use the **Advanced Search** tab for **Employee** attendees and other options

To search for an attendee who is not necessarily in your favorites list:

1. Click **Search.** The **Search Attendees** screen appears.
2. From the **Choose an Attendee Type** list, select the appropriate attendee type.
3. For an **Employee**, enter only the Last Name and First Name (no nicknames)
   NOTE: You must leave the Title and Company fields blank for employee entries.
4. Click **Search.** The search results appear.
5. Select the check box to the left of the desired attendee(s).
6. Click **Add to Expense**

Search Attendees ✕

| Search Attendees | Favorites | Recently Used | Attendee Groups |

Choose an Attendee Type

Employee ⌄

Last Name	First Name	Attendee Title	Company
Bott	Anthony		

Search   Reset

Search Results

☑	Email Address	Attendee Name	Attendee Title	Company	Attendee Type
☑	tbott@gwu.edu	Bott II, Anthony			Employee

|◁ ◁ | Page 1 of 1 | ▷ ▷| | ↻   Displaying 1 - 1 of 1

New Attendee   Add to Expense   Delete   Close

3) Choose from your **Favorites** (individuals or attendee groups)

There are several ways to add one or more attendees to an expense if the attendee is already in your **Favorites** list

In the **Attendees** section, use the type-in field [Search Recently Used] to:

Add an individual attendee to an expense:
1. Begin typing the last or first name of the attendee you seek. A list of attendees appears.
2. Select the desired attendee.

Add an attendee group to an expense:
3. Begin typing in the last or first letters of a group name and type in an asterisk (*). Your attendee groups appear at the top of the list.
2. Select the desired group.

Use the **Favorites** button:

    To add one or more individual attendees to an expense:

        1. Click the **Favorites** tab, which brings up the **Search Attendees** window:

Search Attendees   ✕

Search Attendees	Favorites	Recently Used	Attendee Groups

☐ Attendee Name	Attendee Title	Company	Attendee Type
☐ Adcock, Kathryn			Employee
☐ Aquiline, Angela	CEO	ABC Inc.	Business Guest
☐ Bancroft, Lisa	Sales Rep	HD Supply	Business Guest
☐ Bott, Yoshiko			Spouse
☐ Bott, Yoshiko	Special Guest S...	Self	Partner/Collabor...
☐ Bott II, Anthony			Employee
☐ Gimmell, Douglas	Dir. Employee A...	UCLA	Business Guest
☐ Ginter, Donna			Employee

        2. Select one or more attendees.

        3. Click **Add to Expense**.

    To add one or more attendee groups to an expense:

        1. Click the **Favorites** tab to bring up the **Search Attendees** window

        2. Click the **Attendee Groups** tab.

        3. Select one or more groups.

        4. Click **Add to Expense**.

Use the **Recently Used** tab to find recently used attendees

    To locate recently used attendees:

        1. Click **Favorites or Advanced Search.** The **Search Attendees** window appears.

        2. Click the **Recently Used** tab.
           NOTE: This tab lists the last 25 attendees that you have used *minus* those already assigned to the expense.

        3. Select one or more attendees.

        4. Click **Add to Expense.**

4) Use the **Import** feature

You can import a list of attendees from an Excel spreadsheet into an expense instead of entering the attendees individually. This feature benefits users who must list a large number of attendees, for example, for a seminar or department function.

To import the attendees, you must complete a template spreadsheet and then import it into Expense. To do so click **Import.** The **Attendee Import** window appears.

    To complete a template spreadsheet:

1. Click **link** to access a template spreadsheet.
2. Choose "Save link as…" to save the spreadsheet to your computer
3. Open the worksheet in Excel.
4. Enter the attendee information as shown below:

Please Note:
Attendee Information must begin in Row 3 of the Excel File.
Do not leave any blank rows between entries in the worksheet.

Copy the Code from the **AtnTypeKey** worksheet on Attendee Template

	A	B
1	**Code**	**Name**
2	BUSGUEST	Business Guest
3	SPOUSE	Spouse
4	STUDENT	Student
5	PARTNER	Partner/Collaborator
6	SYSEMP	Employee
7		

Paste the Code into the next cell down in Column A. Do not fill in the Title and Company fileds for Employees (SYSEMP). For all other, Non-Employee Attendee Types, all fields must be completed. **Save** your work.

	A	B	C	D	E
1	AtnTypeKey	LastName	FirstName	Title	Company
2	**Attendee Type**	**Last Name**	**First Name**	**Attendee Title**	**Company**
3	BUSGUEST	Aquiline	Angela	CEO	ABC Inc.
4	BUSGUEST	Bear	Bobby	CFO	ABC Inc.
5	BUSGUEST	Crystalline	Carol	IT Manager	ABC Inc.
6	BUSGUEST	Dense	Daniel	Trustee	ABC Inc.
7	SYSEMP	Bott	Anthony		
8	SYSEMP	Adcock	Kathryn		
9	SYSEMP	Romero	Deletta		
10	SYSEMP	Ginter	Donna		
11	SYSEMP	Maestrey	Jaime		
12	SYSEMP	Odoi	William		
13	SYSEMP	Rubin	Joshua		
14					
15					

To import the completed worksheet into Expense:

5. On the **Upload Your Data** page of the **Attendee Import** window, click the **Choose File** button
6. Locate and click on the completed spreadsheet.
7. Click **Next.** The **Preview** page of the **Attendee Import** window appears and displays the imported attendee information.

Review the information for accuracy.

8. If the information is correct, click **Next.**
If the information is *not* correct, click **Cancel,** correct the worksheet, and import again.

If you want the attendees listed on this page to be imported, click **Done**.

You can see all of your Attendee Groups:

➔ In an open report when a Business Meal or Event expense line is selected. Click either the **Advanced Search** or **Favorites** button to see your groups.

➔ By logging into iBuy Expense Reporting and choosing Profile > Profile Settings > Expense Settings > Favorite Attendees.

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