

# iBuy Expense Reporting Attendee Help Guide

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## Add an attendee to an expense

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

- Choose from your favorites (including attendee groups)
- Search for an attendee
- Use recently used attendees
- Create a new attendee (Non-Employees)
- Import attendees

## 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 (as listed in **Profile > Profile Settings > Favorite Attendees** in the left menu).

## Use the favorites field (the type-ahead field to the right of the Favorites button in the Attendees area):

- To add an individual attendee to an expense:
  1. In the field with the text *Enter last or first name*, type several letters. A list of attendees appears.
  2. Select the desired attendee.
- To add an attendee group to an expense:
  1. In the field with the text *Enter last or first name*, type the 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 **Favorites**. The **Favorites** tab appears.  
**NOTE:** This page lists your favorite attendees (as listed in **Profile > Profile Settings > Favorite Attendees**) *minus* those already assigned to the expense.
  2. Select one or more attendees.
  3. Click **Add to Expense**.
- To add one or more attendee groups to an expense:
  1. Click **Favorites**. The **Favorites** tab appears.
  2. Click the **Attendee Groups** tab.
  3. Select one or more groups.
  4. Click **Add to Expense**.

## Use search (for attendees NOT in your favorites list)

- To search for an attendee who is not necessarily in your favorites list:
  1. Click **Search**. The **Search Attendees** tab appears.
  2. From the **Choose an Attendee Type** list, select the appropriate attendee type.
  3. Enter part of the name, etc. in the criteria fields.
  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**.

## Use recently used attendees

- To locate recently used attendees:
  1. Click **Favorites** or **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**.

## Create a new attendee

- If you cannot locate the desired attendee in your favorites or by using search, and the attendee is not an employee:
  1. Click **New Attendee**.
  2. Complete the required information.
  3. Click **Save**.

## Use the Personal Attendee 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 seminars or department functions.

### Complete the template spreadsheet and import the attendees

1. To import the attendees, you will complete a template spreadsheet and then import into Expense. To do so:  
Click **Import**. The **Upload Your Data** page of the **Attendee Import** window appears.
2. To complete the template spreadsheet:
  - Click the link to access a template spreadsheet.
  - Save the spreadsheet to your computer or network.
  - Open the worksheet in Excel.
  - Enter the attendee information.
    - Attendee Information must begin in Row 3 of the Excel File
    - Do not leave any blank lines in the file.
    - When using SYSEMP Attendee Type you must leave the Title and Company Name Blank
  - Save.
3. To import the completed worksheet into Expense:
  - On the **Upload Your Data** page of the **Attendee Import** window, click **Browse**.
  - Locate the completed spreadsheet.
  - Click **Next**. The **Preview** page of the **Attendee Import** window appears, which displays the imported attendee information.
4. Review the information for accuracy. Then:
  - If the information is correct, click **Next**.
  - If the information is **not** correct, click **Cancel**, correct the worksheet, and import again.
5. In the next step, Expense checks for errors. If there are errors, the **View Errors** page of the **Attendee Import** window appears. Any attendees that appear on this page will **not** be imported.
  - If you want the attendees listed on this page to be imported, click **Done**, correct the worksheet, and import again.
  - If you do **not** want the attendees listed on this page to be imported (perhaps you have decided to add them later in Expense - manually, without using the import), click **Next**.

6. In the next step, Expense checks for duplicates by comparing the attendees on the worksheet to attendees already in the system. If there are possible duplicates, the **Resolve Duplicates** page of the **Attendee Import** window appears.
  - Possible duplicates from the worksheet appear in the top part of the window.
  - Existing attendees appear in the bottom part of the window.

Then:

- If a possible duplicate (from the worksheet) truly is an existing attendee, select the attendee in the bottom part of the window and click **Use Selected Attendees**.
- If the possible duplicate (from the worksheet) is **not** an existing attendee, click **Continue Adding New Attendee**.

#### NOTES:

- Attendees that are missing required fields can now be imported. The attendees must have at least the Last Name and Attendee Type field completed. The user can add all other required fields to the attendee record after import.
  - Attendees that are in your Favorites are not treated as duplicates, providing that the attendee record appears once, and only once, in your favorite attendees.
  - Attendees of type SYSEMP (Employee), where the user is not allowed to create a new attendee record, can now be imported and will be matched to one existing employee record. The Title and Company Name **MUST** be left blank.
  - If Expense finds more than one possible duplicate (so that several names are listed at the top and bottom of the page), deal with each one individually.
7. When done, click **Next**. The final page appears. On this page, this information appears:
    - **Skip:** A skip occurs if an attendee is added to an expense and then you import the same worksheet with the same attendee to the same expense.
    - **Failed:** The system detected that there was an error and you elected to **not** import that attendee.
    - **Duplicate:** As described previously, the system compares information from the attendees on the worksheet to the attendees already in the system. If the External IDs are not an exact match, you are asked to indicate if the imported attendee truly is a duplicate.
  8. Click **Done**. The attendees are imported into the expense.