Welcome to our introductory training on adding attendees to an expense report in Concur. This video is specific to adding attendees. For full details on how to create an expense report, please refer to our Expense Report training video.
Attendees are associated with official hospitality charges.
You will start the process of adding attendees in one of two places.
If you are creating a new expense report, on the Concur home screen, click on Start a Report.
You will see the report header screen. For further instructions on how to complete the report header fields, please refer to the Expense Reports training video.
If you are adding attendees within an existing, unsubmitted report, click on the dropdown menu next to the Home page identifier, and select Expense.
You will see the Manage Expenses screen. Locate the unsubmitted report and click on it.
For both new reports and existing, unsubmitted reports, when you come to the screen that provides the Attendees option, click on the Attendees link.
On the next screen, click the Add button.
If the attendee is new—one you have not previously entered into a Concur report—click on Create New Attendee.
Fill in all required fields.
Then click Create Attendee.
The attendee has been added to the Attendee list.
To create additional attendees, repeat the process.
Once all attendees have been created, click the Go Back link at the top left of the screen.
If the attendee you wish to add is an existing attendee—an attendee added before in a Concur report—you may be able to locate them via the Recent Attendee tab.
If not, fill in the Attendee Type field and enter the person’s first and/or last name to search your attendee database.
Once you locate the attendee, check the box to the left of their name and then click the Add to List button on the right of the screen.
You will see a notification that the attendee has been added to the list.
To search for additional attendees, click the Search button
Or, if you are finished searching, click Close.
The screen returns to the list of attendees you have added.
If you have multiple attendees, you will see that the total amount of the official hospitality expense has been divided among all the attendees you have listed.
Click Save in the bottom right corner.
The Attendees link will now show the number of attendees you have added to the report.
It is also possible to add attendees by attendee groups if there are groups of attendees you will use recurringly.
To create an attendee group, either search for or create each attendee who needs to be part of the group. All the attendees you search for or create will show on your attendee list.
Check the boxes at the left to select them.
Then click Create Group.
It will ask you to give the group a name.
Once you have done that, click Save.
The screen returns to your attendee list. Click Save.
The attendees have been added to the report.
And the group now exists in the Attendee Group list.