

CRC Expense/Concur Guide:

Attendees for Business Meals and
Catered Meals



ATTENDEES

- When preparing an expense report, the names and details of attendees are required for several Expense Types, including:
 - Business Meals – All CRC Personnel
 - Business Meals w/ Non-CRC Personnel
 - Entertainment w/ Non-CRC Attendees
 - PCard – Catering

✓ Recently Used Expense Types

Car Rental	Hotel Deposit
Personal Car Mileage	Business Meals - All CRC Personnel

All Expense Types

ACCOMODATIONS

Hotel
Hotel Deposit

AIR TRANSPORTATION

Additional Travel Expenses
Airfare - Employee
Airfare - Non-CRC Personnel
Airfare - Spousal/Dependant

AUTO/GROUND TRANSPORTATION

Car Rental

CONVENTIONS/SEMINARS/TRAINING

Foreign Conventions
Seminars & Conferences
Training

ENTERTAINMENT & MEALS

Business Meals - All CRC Personnel
Business Meals w/Non-CRC Personnel
Entertainment w/Non-CRC Attendees
Meals for Self
Oil Rig Groceries

✓ Recently Used Expense Types

PCard - Catering	PCard - Government/Regulatory
PCard - Services	

All Expense Types

PCard - Automotive Services	PCard - Hardware/Equipment
PCard - Catering	PCard - Medical
PCard - Computers/Electronics	PCard - Miscellaneous Purchases
PCard - Consultants/Contractors	PCard - Office Supplies
PCard - Disputed Charge	Pcard - Personal Misuse
PCard - Fuel	PCard - Postal/Couriers
PCard - Government/Regulatory	PCard - Printing

ENTERING ATTENDEES ONTO AN EXPENSE REPORT

- You have several options for entering attendees. You can:
 - (1) Input a New Attendee
 - (2) Do an Advanced Search
 - (3) Select from your Favorites/Recently Used
 - (4) Import a list of attendees from Excel
 - (5) Do a quick search of Recently Used

New Expense Available Receipts

Expense Type Business Meals - All CRC Pe	Transaction Date 08/08/2016	Business Purpose test	Vendor Name Pizza Hut
City Los Angeles, California	Payment Type Cash	Amount 50.00 USD	Comment
International Travel No	Lobbying No	GL System Oracle	Operating Unit (OGC) Oil and Gas Corp
Organization (068577) CRC Operations Sl	Project (1190363 - Project) CRC OH	Task (01160503) Accounts Payable	

Attendees Attendees: 1 | Attendee Total: \$50.00 | Remaining: \$0.00

1 New Attendee **2** Advanced Search **3** Favorites **4** Import **5** Search Recently Used Remove Create Group

<input type="checkbox"/>	Attendee Name	Title	Company	Type	Amount
<input type="checkbox"/>	Wu, Anthony			Self	\$50.00

1. NEW ATTENDEE

- Selecting **New Attendee** will allow you to select the Attendee Type (Business Guest, CRC Employee, Family Member, etc.), enter the attendee's name, and title/company (if they are a non-CRC employee). Fields highlighted in red are required.

New Expense

Expense Type Business Meals - All CRC Pe	Transaction Date 08/08/2016	Business Pr test
City Los Angeles, California	Payment Type Cash	Amount 50.00
International Travel No	Lobbying No	GL System Oracle
Organization (068577) CRC Operations St	Project (1190363 - Project) CRC OH	Task (01160503

Attendees

1

New Attendee Advanced Search Favorites Import Search Recently Used

<input type="checkbox"/>	Attendee Name
<input type="checkbox"/>	Wu, Anthony

Add Attendee

Type Business Guest	Last Name Doe
First Name John	Title President
Company ABC Inc	

Save & Add Another Save Cancel

2. ADVANCED SEARCH

- Selecting **Advanced Search** will allow you to search for previously-used attendees, and to refine your search based on the Attendee Type, Last Name, First Name, Title, and Company. This is useful if you want to narrow down attendees who have the same last name, or if you want to select multiple business guests from the same company.

New Expense

Expense Type Business Meals - All CRC Pe	Transaction Date 08/08/2016	Business Purp test
City Los Angeles, California	Payment Type Cash	Amount 50.00
International Travel No	Lobbying No	GL System Oracle
Organization (068577) CRC Operations St	Project (1190363 - Project) CRC OH	Task (01160503) /

Attendees 2

New Attendee **Advanced Search** Favorites Import Search Recently Used

<input type="checkbox"/>	Attendee Name
<input type="checkbox"/>	Wu, Anthony

Search Attendees

Search Attendees Favorites Recently Used Attendee Groups

Choose an Attendee Type
Business Guest

Last Name: Doe First Name: Title: Company:

Search Results

Attendee Name

- Doe, Jack
- Doe, Jane
- Doe, Jay
- Doe, Jean
- Doe, Jenny
- Doe, Jev

Page 1 of 1

3. FAVORITES

- Selecting **Favorites** will let you select attendees from a group of favorites. If you have to input the same attendees regularly, this section will automatically populate them. Just click the checkboxes next to their names, then click **Add to Expense**.

New Expense

Expense Type: Business Meals - All CRC Pe
Transaction Date: 08/08/2016
Business Pt: test
City: Los Angeles, California
Payment Type: Cash
Amount: 50.00
International Travel: No
Lobbying: No
GL System: Oracle
Organization: (068577) CRC Operations St
Project: (1190363 - Project) CRC OH
Task: (01160503)

Attendees

3

New Attendee Advanced Search Favorites Import Search Recently Used

<input type="checkbox"/>	Attendee Name
<input type="checkbox"/>	Wu, Anthony

Search Attendees

Search Attendees Favorites Recently Used Attendee Groups

<input type="checkbox"/>	Attendee Name	Title	Company	Type
<input checked="" type="checkbox"/>	Abdon, Walter		CRC	Employee
<input checked="" type="checkbox"/>	Adamyán, Lusine		CRC	Employee
<input checked="" type="checkbox"/>	Bravo, Daniel		CRC	Employee
<input type="checkbox"/>	Martinez, Olga		CRC	Employee
<input type="checkbox"/>	Neresian, Marine		CRC	Employee
<input type="checkbox"/>	Perez, Hector		CRC	Employee
<input type="checkbox"/>	Salazar, Rafael		CRC	Employee
<input type="checkbox"/>	Sosa, Stephen		CRC	Employee
<input type="checkbox"/>	Ung, Steven		CRC	Employee

Page 1 of 1

Displaying 1 - 9 of 9

New Attendee Add to Expense Delete Close

4. IMPORT

- Clicking **Import** will let you import an Excel spreadsheet containing the names/details of attendees. This method is helpful when you have a large list of attendees and/or you prefer to set up an attendee list outside of Concur.
- Please note that there is a limit of 5,000 attendees for this import method.

New Expense

Expense Type: Business Meals - All CRC Pe

Transaction Date: 08/08/2016

Business Pt: test

City: Los Angeles, California

Payment Type: Cash

Amount: 50.00

International Travel: No

Lobbying: No

GL System: Oracle

Organization: (068577) CRC Operations St

Project: (1190363 - Project) CRC OH

Task: (01160503)

Attendees

New Attendee | Advanced Search | Favorites | **Import** | Search Recently Used

<input type="checkbox"/>	Attendee Name
<input type="checkbox"/>	Wu, Anthony

Attendee Import

1 Upload Your Data | 2 Preview | 3 Done!

The imported attendees will be added to this expense and to your favorites. The attendee import feature requires Microsoft Excel.

To create the spreadsheet:

1. Right-click this [link](#).
2. Select the appropriate menu option to save the template spreadsheet to your computer.
3. Once saved, open the spreadsheet and enter the attendee information.
4. Save.

To upload your attendee information:

1. Click **Browse** in this window.
2. Locate your spreadsheet and click **OK**.
3. Click **Next** in this window.

Browse...

4. IMPORT (CONTINUED)

- You will need to download Concur's spreadsheet template, then fill in the necessary fields and upload the file.

	A	B	C	D	E	F
1	AtnTypeKey	LastName	FirstName	Title	Company	Custom1
2	Attendee Type - REQUIRED	Last Name - REQUIRED	First Name - REQUIRED	Title - REQUIRED	Company - REQUIRED	Age - REQUIRED for RELO
3	Business Guest	Doe	Jean	EVP	RST Limited	
4	Business Guest	Doe	Jay	Senior VP	JKL United	
5						
6						
7						
8						
9						
10						
11						
12						

Attendee Import

1 Upload Your Data 2 Preview 3 Done!

The following attendees were included on the spreadsheet. Click Next to continue.

	Attendee Type - REQUI...	Last Name - REQUIRED	First Name - REQUIRED	Title - REQUIRED	Company - REQUIRED	Age - REQUIRED for RE...
1	Business Guest	Doe	Jean	EVP	RST Limited	
2	Business Guest	Doe	Jay	Senior VP	JKL United	

< < | Page 1 of 1 | > > | ↻

<< Previous **Next >>** Cancel

5. SEARCH RECENTLY USED

- And finally, you can use the **Search Recently Used** field if you want to do a quick search of recently-used attendees.

New Expense Available Receipts

Expense Type: Business Meals - All CRC Pe
Transaction Date: 08/08/2016
Business Purpose: test
Vendor Name: Pizza Hut
City: Los Angeles, California
Payment Type: Cash
Amount: 50.00 USD
Comment:
International Travel: No
Lobbying: No
GL System: Oracle
Operating Unit: (OGC) Oil and Gas Corp
Organization: (068577) CRC Operations Sl
Project: (1190363 - Project) CRC OH
Task: (01160503) Accounts Payable

Attendees Attendees: 1 | Attendee Total: \$50.00 | Remaining: \$0.00

[New Attendee](#) [Advanced Search](#) [Favorites](#) [Import](#) [Search Recently Used](#) [Remove](#) [Create Group](#)

<input type="checkbox"/>	Attendee Name	Title	Company	Type	Amount
<input type="checkbox"/>	Wu, Anthony			Self	\$50.00

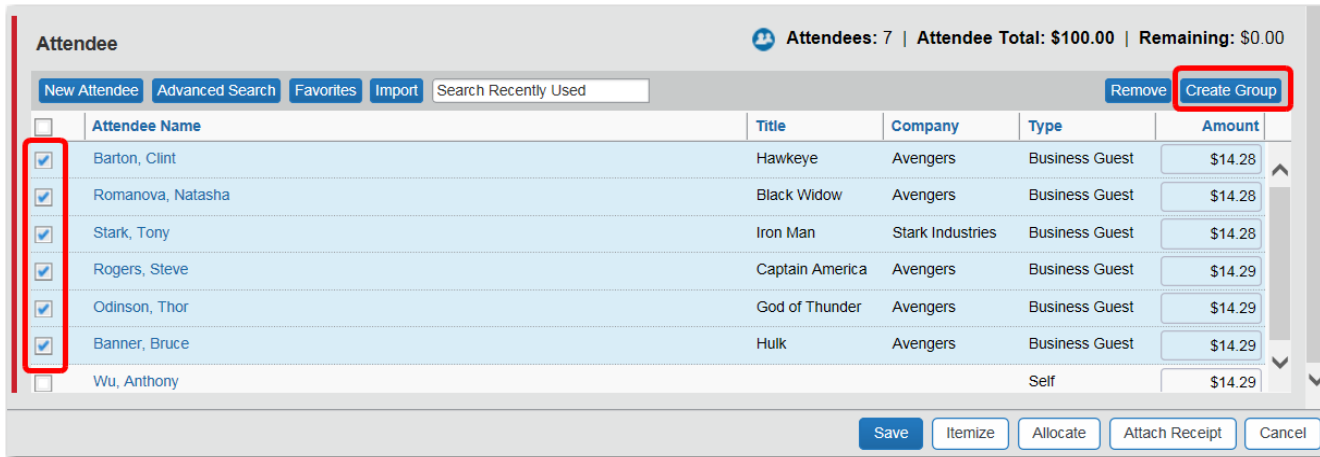
[Save](#) [Itemize](#) [Allocate](#) [Attach Receipt](#) [Cancel](#)

CREATING ATTENDEE GROUPS

- In Concur, you also have the ability to create Attendee Groups that you can reuse on future expense reports.
- If you have the same group of people attending monthly meetings, or an entire department attending quarterly reviews, the Attendee Group is a powerful tool so you won't need to re-enter each individual attendee.

CREATING ATTENDEE GROUPS (CONTINUED)

- To create an Attendee Group, add the individual attendees to an expense report, check the boxes next to their name, then click **Create Group**. Enter the name you'd like to use for this group, then click **Save**.



Attendee Attendees: 7 | Attendee Total: \$100.00 | Remaining: \$0.00

New Attendee Advanced Search Favorites Import Search Recently Used Remove **Create Group**

<input type="checkbox"/>	Attendee Name	Title	Company	Type	Amount
<input checked="" type="checkbox"/>	Barton, Clint	Hawkeye	Avengers	Business Guest	\$14.28
<input checked="" type="checkbox"/>	Romanova, Natasha	Black Widow	Avengers	Business Guest	\$14.28
<input checked="" type="checkbox"/>	Stark, Tony	Iron Man	Stark Industries	Business Guest	\$14.28
<input checked="" type="checkbox"/>	Rogers, Steve	Captain America	Avengers	Business Guest	\$14.29
<input checked="" type="checkbox"/>	Odinson, Thor	God of Thunder	Avengers	Business Guest	\$14.29
<input checked="" type="checkbox"/>	Banner, Bruce	Hulk	Avengers	Business Guest	\$14.29
<input type="checkbox"/>	Wu, Anthony			Self	\$14.29

Save Itemize Allocate Attach Receipt Cancel



Create Group ×

Enter Group Name:

Save Cancel

USING ATTENDEE GROUPS

- On future expense reports, when you want to use an Attendee Group, click **Favorites**.

New Expense Available Receipts

Expense Type: Business Meals w/Non-CRC
Transaction Date: 08/07/2016
Business Purpose: test
Vendor Name: Island's

City: Los Angeles, California
Payment Type: Cash
Amount: 100.00 USD
Comment: test

Lobbying: No
GL System: Oracle
Operating Unit: (OGC) Oil and Gas Corp
Organization: (068577) CRC Operations St

Project: (1190363 - Project) CRC OH
Task: (01160503) Accounts Payable

Attendee Attendees: 1 | Attendee Total: \$100.00 | Remaining: \$0.00

<input type="checkbox"/>	Attendee Name	Title	Company	Type	Amount
<input type="checkbox"/>	Wu, Anthony		Self	Self	\$100.00

USING ATTENDEE GROUPS (CONTINUED)

- In the new Favorites window, (1) click the **Attendee Groups** tab, (2) select the **Attendee Group** you want to use, for example, “The Avengers”, (3) click **Add to Expense**, then (4) click **Close** to return to your expense report.

Search Attendees

Search Attendees Favorites Recently Used **Attendee Groups**

Attendee Groups

Attendee Name	Title	Company	Type
Group: The Doe Group (test)			
Group: CRC AP Group LA			
Group: Heroes and Toons (test)			
Group: The Avengers			
Barton, Clint	Hawkeye	Avengers	Business Guest
Romanova, Natasha	Black Widow	Avengers	Business Guest
Stark, Tony	Iron Man	Stark Industries	Business Guest
Rogers, Steve	Captain America	Avengers	Business Guest
Odinson, Thor	God of Thunder	Avengers	Business Guest
Banner, Bruce	Hulk	Avengers	Business Guest

New Attendee **Add to Expense** Delete **Close**

EDITING FAVORITE ATTENDEES

- Once you've created Favorite Attendees or Attendee Groups, you can go back and edit them if necessary. Click the **Profile** button in the top-right corner, then click **Profile Settings**.

The screenshot displays the Concur web application interface. At the top, the navigation bar includes the Concur logo, menu items for Travel, Expense, Approvals, Reporting, and App Center, and user options for Administration and Help. A red box highlights the 'Profile' dropdown menu in the top right corner. Below this, a user profile card for 'Anthony Wu' is shown, with a red box around the 'Profile Settings' link. Other options in the profile card include 'Sign Out' and 'Acting as other user'. The 'Acting as other user' section contains two radio buttons: 'Act as user in assigned group (Proxy)' (selected) and 'Book travel for any user (Self-assign)'. A search box labeled 'Search by name or ID' and buttons for 'Cancel' and 'Start Session' are also visible. The main content area shows a 'TRIP SEARCH' section with a 'Flight Search' filter and a 'Message for Administrators' banner for 'Product News | July 2016' with a 'Watch Video' button.

EDITING FAVORITE ATTENDEES (CONTINUED)

- On the **Profile Options** page, click **Favorite Attendees** in the left-hand column.

The screenshot displays the Concur user interface. At the top, there is a navigation bar with the Concur logo and menu items: Travel, Expense, Approvals, Reporting, and App Center. On the right side of the navigation bar, there are links for Administration and Help, and a Profile dropdown menu with a user icon. Below the navigation bar, a secondary menu lists: Profile, Personal Information, Change Password, System Settings, Mobile Registration, and Travel Vacation Reassignment. The main content area is titled 'Profile Options' and includes a sub-header: 'Select one of the following to customize your user profile.' The content is organized into two columns. The left column lists various settings categories, with 'Favorite Attendees' highlighted in a red box. The right column provides detailed descriptions for several of these categories.

Profile Options

Select one of the following to customize your user profile.

Personal Information
Your home address and emergency contact information.

Company Information
Your company name and business address or your remote location address.

Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Mobile Registration
Set up access to Concur on your mobile device.

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

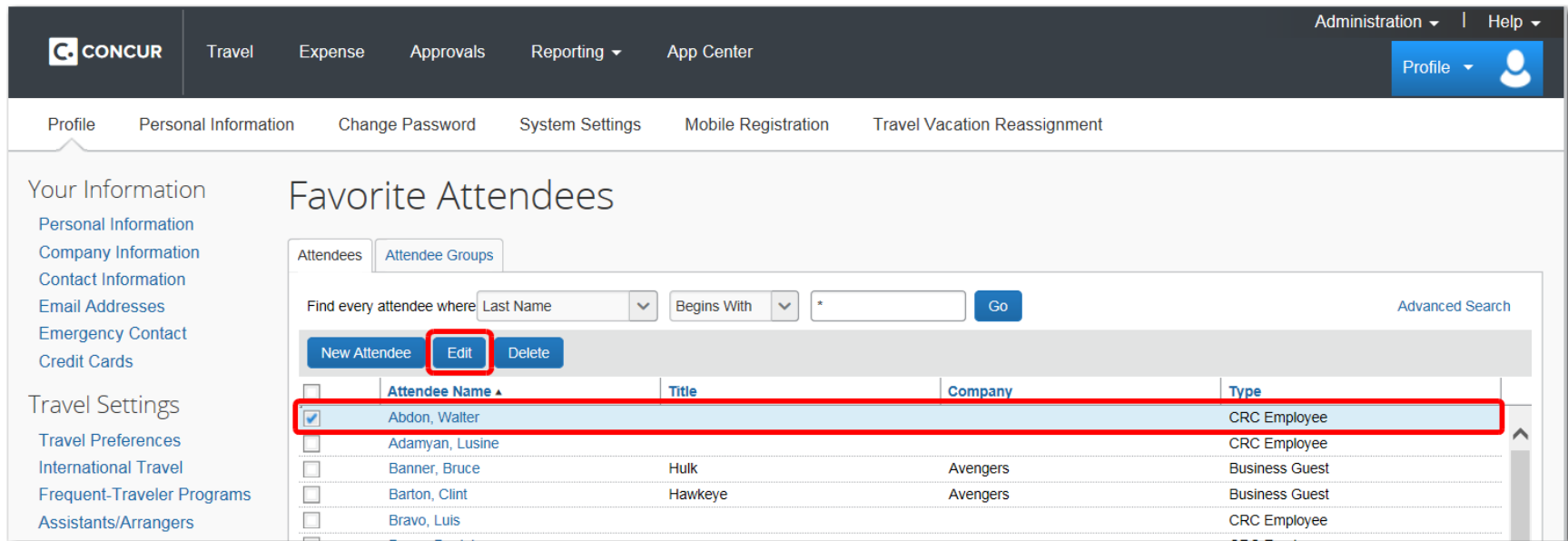
Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.

Change Password
Change your password.

EDITING FAVORITE ATTENDEES (CONTINUED)

- On the **Favorite Attendees** page, you can edit the name, title, company, and other details of each attendee. Just click the checkbox next to the attendee's name, then click **Edit**.



The screenshot shows the CONCUR user interface. The top navigation bar includes 'CONCUR' and menu items for 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. On the right, there are links for 'Administration', 'Help', 'Profile', and a user icon. Below the navigation bar, a secondary menu contains 'Profile', 'Personal Information', 'Change Password', 'System Settings', 'Mobile Registration', and 'Travel Vacation Reassignment'. The main content area is titled 'Favorite Attendees' and features a sidebar on the left with categories like 'Your Information' and 'Travel Settings'. The main area contains a search bar and a table of attendees. The 'Edit' button is highlighted with a red box, and the first row of the table, 'Abdon, Walter', is also highlighted with a red box.

	Attendee Name	Title	Company	Type
<input checked="" type="checkbox"/>	Abdon, Walter			CRC Employee
<input type="checkbox"/>	Adamyian, Lusine			CRC Employee
<input type="checkbox"/>	Banner, Bruce	Hulk	Avengers	Business Guest
<input type="checkbox"/>	Barton, Clint	Hawkeye	Avengers	Business Guest
<input type="checkbox"/>	Bravo, Luis			CRC Employee

EDITING ATTENDEE GROUPS

- To edit Attendee Groups, click the **Attendee Groups** tab. From here, you can create new Attendee Groups or modify existing groups. Select the group you'd like to modify, then click **Edit**.

The screenshot shows the Concur user interface. The top navigation bar includes the Concur logo and menu items: Travel, Expense, Approvals, Reporting, and App Center. On the right, there are links for Administration, Help, Profile, and a user icon. Below the navigation bar, a secondary menu contains: Profile, Personal Information, Change Password, System Settings, Mobile Registration, and Travel Vacation Reassignment. The main content area is divided into two sections: 'Your Information' on the left and 'Favorite Attendees' on the right. The 'Attendee Groups' tab is selected and highlighted with a red box. Below the tabs, there are buttons for 'Add New', 'Edit', 'Send Copy', and 'Delete'. The 'Edit' button is highlighted with a red box. A table of attendee groups is displayed below the buttons. The group 'Group: The Avengers' is selected and highlighted with a red box. The table has columns for 'Attendee Name', 'Title', 'Company', and 'Type'.

Attendee Name	Title	Company	Type
+ Group: The Doe Group (test)			
+ Group: CRC AP Group LA			
+ Group: Heroes and Toons (test)			
- Group: The Avengers			
Banner, Bruce	Hulk	Avengers	Business Guest
Barton, Clint	Hawkeye	Avengers	Business Guest
Odinson, Thor	God of Thunder	Avengers	Business Guest
Rogers, Steve	Captain America	Avengers	Business Guest
Romanova, Natasha	Black Widow	Avengers	Business Guest
Stark, Tony	Iron Man	Stark Industries	Business Guest

EDITING ATTENDEE GROUPS (CONTINUED)

- Click the checkboxes next to individual attendees to remove them from an Attendee Group, or edit the name of the Attendee Group.

Favorite Attendees

Attendees Attendee Groups

Find every attendee where Last Name Begins With *

Go

Group Name The Avengers Save Group Cancel

<input type="checkbox"/>	Attendee Name ▲	Title	Company	Type
<input type="checkbox"/>	Abdon, Walter			CRC Employee
<input type="checkbox"/>	Adamyran, Lusine			CRC Employee
<input checked="" type="checkbox"/>	Banner, Bruce	Hulk	Avengers	Business Guest
<input checked="" type="checkbox"/>	Barton, Clint	Hawkeye	Avengers	Business Guest
<input type="checkbox"/>	Bravo, Luis			CRC Employee
<input type="checkbox"/>	Bravo, Daniel			CRC Employee
<input type="checkbox"/>	Doe, John	President	ABC Inc	Business Guest

BONUS TIP: SENDING ATTENDEE GROUPS

- If you've created an Attendee Group, you can also send that group to another CRC Expense user.
- This is really useful when individuals in the same department are attending events regularly. Once one person creates an Attendee Group, everyone in the department can use that same Attendee Group in the future.

SENDING ATTENDEE GROUPS (CONTINUED)

- To share an Attendee Group, navigate to the **Favorite Attendees** page (Profile > Profile Settings > Favorite Attendees). Switch to the **Attendee Groups** tab, select the Group you'd like to share, then click **Send Copy**.

Favorite Attendees

Attendees | Attendee Groups

Add New Edit **Send Copy** Delete

Attendee Name	Title	Company	Type
+ Group: The Doe Group (test)			
+ Group: CRC AP Group LA			
+ Group: Heroes and Toons (test)			
- Group: The Avengers			
Banner, Bruce	Hulk	Avengers	Business Guest
Barton, Clint	Hawkeye	Avengers	Business Guest
Odinson, Thor	God of Thunder	Avengers	Business Guest
Rogers, Steve	Captain America	Avengers	Business Guest
Romanova, Natasha	Black Widow	Avengers	Business Guest
Stark, Tony	Iron Man	Stark Industries	Business Guest

SENDING ATTENDEE GROUPS (CONTINUED)

- Type in the recipient name, and click **Send**. And that's it! Now you can send a copy of any of your Attendee Groups to other CRC employees.

Send a copy of the selected group(s) ×

You can search for the recipient by name, email address or login ID. Select the recipient and click Send. The selected group(s) will appear in the recipient's attendee group list.

Recipient:

QUESTIONS?

- Thanks for taking the time to read through this guide on Attendees!
- If you have any questions, please feel free to contact the Expense Help team at (866) 272-8504 or ExpenseHelp@crc.com.