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

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**

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.

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.

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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.**

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.

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	

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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.

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.

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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.**

USING ATTENDEE GROUPS

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

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.

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**.

EDITING FAVORITE ATTENDEES (CONTINUED)

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

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.**

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.**

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.

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.

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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**.

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.

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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.

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