

TeamWorks

Travel and Expense

Powered By Concur Technologies

TTE Local Admin:

Attendee Administration
2017



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Revision History

Date	Notes / Comments / Changes
06/05/2017	Updated for New UI

Attendee Administration

Permissions

You may or may not have the correct permissions to use this tool. You may have limited permissions, for example, you can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If you need to use this tool and do not have the proper permissions, contact the TTE Global Administrator at SAO Customer Care Center (404) 657-3956 Option 3 or (888) 896-7771 Option 3 or email sao_travel@sao.ga.gov.

Overview

For some expense types, such as business meals or entertainment, Expense users may be required – sometimes for corporate reasons; sometimes for legal reasons – to identify all attendees associated with that expense. In some cases, each individual attendee must be listed. In other cases, it may be acceptable for the user to simply enter a count (number of unnamed attendees).

The attendee admin tool allows the user to view, modify, and activate or inactivate any attendee record in the system. This provides the capability to perform real-time update and correction of records that need intervention. Examples of these situations are:

- Imported attendee records where the correction must be quickly made and cannot wait for the next import event
- User-entered attendee records with inaccurate or incomplete information
- Duplicate attendee records where one or more of the set of duplicates needs to be inactivated

This has two roles:

- **Attendee Administrator:** The user assigned this role can access, view, and edit information for any attendee in the system, regardless of whether the attendee was imported or entered manually and regardless of whether the attendee is on a private or shared list. The Attendee Administrator can also activate and deactivate attendees
- **Attendee Administrator (Read Only):** The user assigned this role can access and view information for any attendee in the system, regardless of whether the attendee was imported or entered manually and regardless of whether the attendee is on a private or shared list. This role cannot modify the attendee information.

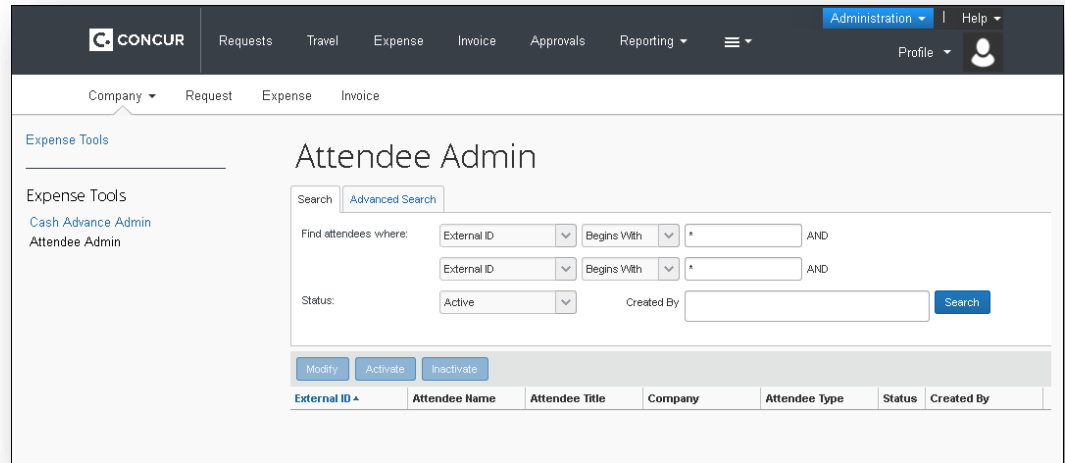
Manage Attendees

Access the Attendee Admin Page

The **Attendee Admin** page is available on the **Administration** menu.

▶ **To access the Attendee Admin page:**

1. Click **Administration > Company > Tools**.
2. In the left menu, click **Attendee Admin**.



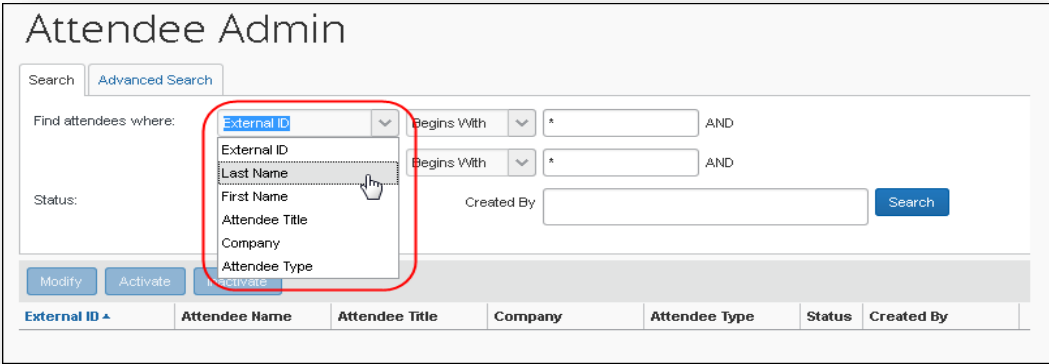
- ◆ Use the **Search** tab by using predefined criteria to search for attendees
- ◆ Use the **Advanced Search** tab to search for attendees using more specific criteria in a search by form approach.
- ◆ Use **Modify** to make changes to the attendee.
- ◆ Use **Activate** or **Inactivate** to change the status of selected attendees

NOTE: Users with the Attendee Administrator (Read Only) role can only view.

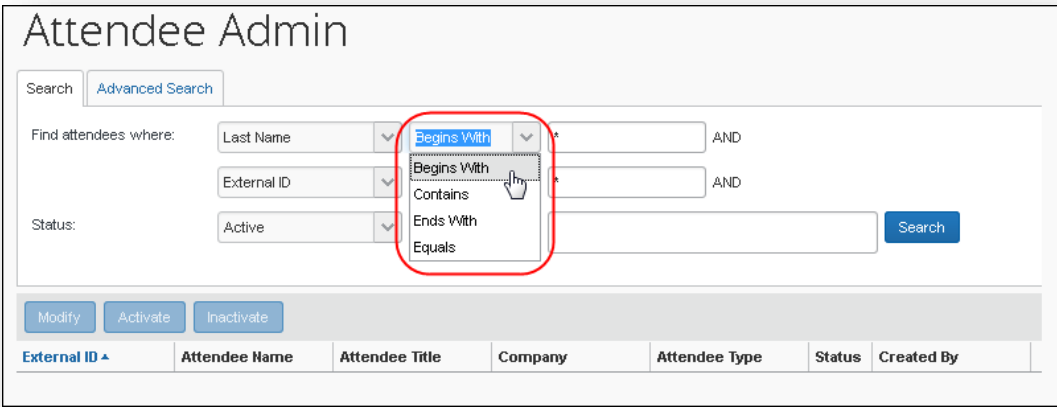
Search for Attendees

▶ **To search for attendees using simple criteria:**

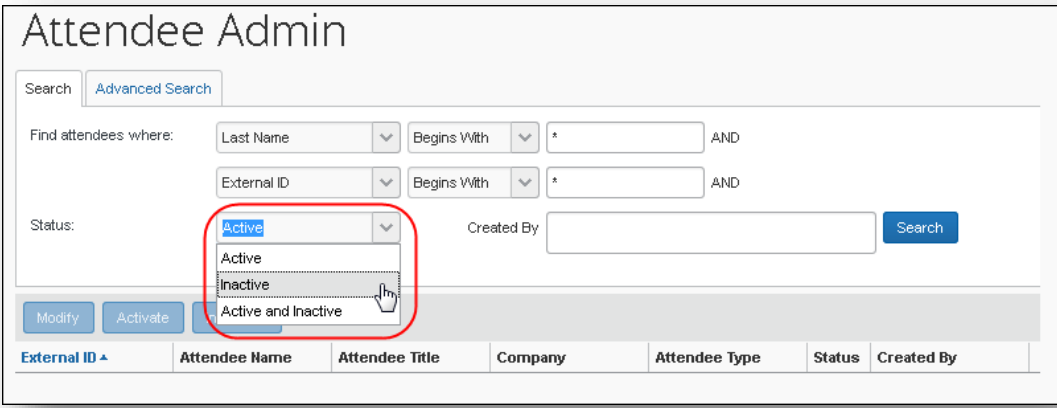
1. On the **Search** tab, select the criteria you want to search for, for example, by *Last Name, First Name*, etc. To further refine your search, add additional criteria to the second search line; for example, *External ID, Last Name*, etc.



- 2. For a more targeted search, make a selection in the following list and enter the desired search text.



- 3. From the **Status** list, select *Active*, *Inactive*, or *Active and Inactive*.



- To search by who created the attendees, in the **Created By** field, start entering the name.

A list of names displays. Select the appropriate name.

The screenshot shows the 'Attendee Admin' interface. At the top, there is a 'Search' tab and an 'Advanced Search' tab. Below this, there are search criteria fields: 'Find attendees where:' with dropdowns for 'Last Name' and 'Begins With' (containing '*'), and 'External ID' and 'Begins With' (containing '*'). The 'Status' is set to 'Active'. The 'Created By' field contains the text 'Armstrong, Stephen (sa@RandomVerbs.com - sa@RandomVerbs.com)'. A 'Search' button is visible. A dropdown menu is open below the 'Created By' field, listing several names and email addresses, including 'Armstrong, Stephen', 'Hale, Sandy', 'Kensington, Sam', 'King, Susan', 'Kuberry, Sarah', 'Mainard, Sebastien', 'Martine, Sophie', and 'Matthieu, Simon'. Below the search fields are buttons for 'Modify', 'Activate', and 'Inactivate'. At the bottom, there is a table header with columns: 'External ID', 'Attendee Name', and 'Attendee Title'.

- Click **Search**. The list of attendees displays.

The screenshot shows the 'Attendee Admin' interface with the search results displayed. The search criteria are the same as in the previous screenshot. The 'Created By' field is now empty. The 'Search' button is highlighted. Below the search fields are buttons for 'Modify', 'Activate', and 'Inactivate'. The table below shows the following data:

External ID	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
	Werther, James	CEO	LenDev	Business Guest	Active	Brown, Terry
	Tracktenburg, Lily	CFO	LenDev	Business Guest	Active	Brown, Terry
	Charmeigne, Anne ...	COO	Lendev	Business Guest	Active	Brown, Terry
	Smith, David			Business Guest	Active	Brown, Terry
	Smith, John	Director of Finance	XYZ Company	Business Guest	Active	Gato, Bailey
	Michaels, June	Travel Service Mana...	XYZ Company	Business Guest	Active	Gato, Bailey
	Fickel, Mary	CEO	XYZ Company	Business Guest	Active	Gato, Bailey

► **To perform an advanced search for attendees:**

- On the **Advanced Search** tab, select the desired attendee type.

Attendee Admin

Search
Advanced Search

Attendee Type

Business Guest

- Business Guest
- Employee
- Healthcare Provider
- Spouse
- This Employee

Last Name

First Name

Company

Created By

2. Enter additional information to limit the search results to the appropriate attendee records. A full set of form fields for the attendee is available for entering search criteria.
3. From the **Status** list, select *Active*, *Inactive*, or *Active and Inactive*.
4. To search by who created the attendees, in the **Created By** field, start entering the name.

A list of names displays. Select the appropriate name.

Attendee Admin

Search
Advanced Search

Attendee Type

Business Guest

Last Name

First Name

Attendee Title

Company

Status:

Active

Created By

- Allen, Bea (beaallen@randomverbs.com - BeaAllen@RandomVerbs.com)
- Bertrand, Claude (ClaudeBertrand@RandomVerbs.com - ClaudeBertrand@RandomVerbs.com)
- Boyce, Phillip
- Brown, Terry (terrybrown@randomverbs.com - TerryBrown@RandomVerbs.com)
- Gato, Bailey (baileygato@randomverbs.com - BaileyGato@RandomVerbs.com)
- Swedish, Belinda (belinda@randomverbs.com - belinda@randomverbs.com)
- w, bill (billw@RandomVerbs.com - billw@RandomVerbs.com)
- Zander, Ben (benzander@RandomVerbs.com - benzander@RandomVerbs.com)

5. Click **Search**. The list of attendees displays.

Attendee Admin

Attendee Type:

Last Name:
 First Name:

Attendee Title:
 Company:

Status:
 Created By:

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
	Werther, James	CEO	LenDev	Business Guest	Active	Brown, Terry
	Tracktenburg, Lily	CFO	LenDev	Business Guest	Active	Brown, Terry
	Charmeigne, Anne ...	COO	Lendev	Business Guest	Active	Brown, Terry
	Smith, David			Business Guest	Active	Brown, Terry
	Brooks, Pamela	CFO	Medicoaster	Business Guest	Active	Brown, Terry
	Davis, Pat	Support Manager	Terraformica	Business Guest	Active	Brown, Terry

Modify Attendees

▶ To modify an attendee:

1. Either:
 - ◆ Select the desired attendee and click **Modify**.
 - or –
 - ◆ Double-click the attendee name.

The **Modify Attendee** window displays.

Modify Attendee ✕

Attendee Type:

Last Name:
 First Name:

Attendee Title:
 Company:
 Created By (Private List):

2. Make the desired changes.

NOTE: The administrator can change the Attendee Type value for an attendee added to a report, request, or payment request up to the point at which the report, request, or payment request is submitted, after which this value is locked down by the system.

3. Click **Save**.

Activate or Inactivate Attendees

If an attendee has ever been used on any expense, that attendee cannot be deleted from the system. However, you can inactivate an attendee so that users can no longer select that attendee.

▶ **To activate or inactivate an attendee:**

1. Select one or more of the desired attendee(s).
2. Click **Activate** or **Inactivate**, whichever applies.

View Attendees

▶ **To view an attendee:**

1. Either:
 - ◆ Select the desired attendee and click **Modify** if you have the Attendee Administrator role or **View** if you have the Attendee Administrator (Read Only) role.
 - or –
 - ◆ Double-click the attendee name.

Depending on your role, the **Modify/View Attendee** window displays.

Attendee Admin

Search

Attendee Type: Last Name: First Name:

Attendee Title: Company:

Status: Created By:

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
	Werther, James	CEO	LenDev	Business Guest	Active	Brown, Terry
	Tracktenburg, Lily	CFO	LenDev	Business Guest	Active	Brown, Terry
	Charmeigne, Anne ...	COO	LenDev	Business Guest	Active	Brown, Terry
	Smith, David			Business Guest	Active	Brown, Terry
	Brooks, Pamela	CFO	Medicoaster	Business Guest	Active	Brown, Terry
	Davis, Pat	Support Manager	Terraformica	Business Guest	Active	Brown, Terry
	Doe, John	Sr. Program Manager	SomeCompany	Business Guest	Active	Brown, Terry
	Smith, Mike	TypeCasting		Business Guest	Active	Brown, Terry
444543346	Adams, John	Director	Len Dev	Business Guest	Active	Brown, Terry

Attendee Admin

Search

Attendee Type: Last Name: First Name:

Attendee Title: Company:

Status: Created By:

External ID ▲	Attendee Name	Attendee Title	Company	Attendee Type	Status	Created By
	Werther, James	CEO	LenDev	Business Guest	Active	Brown, Terry
	Tracktenburg, Lily	CFO	LenDev	Business Guest	Active	Brown, Terry
	Charmeigne, Anne ...	COO	LenDev	Business Guest	Active	Brown, Terry
	Smith, David			Business Guest	Active	Brown, Terry
	Brooks, Pamela	CFO	Medicoaster	Business Guest	Active	Brown, Terry
	Davis, Pat	Support Manager	Terraformica	Business Guest	Active	Brown, Terry
	Doe, John	Sr. Program Manager	SomeCompany	Business Guest	Active	Brown, Terry
	Smith, Mike	TypeCasting		Business Guest	Active	Brown, Terry
444543346	Adams, John	Director	Len Dev	Business Guest	Active	Brown, Terry

2. When you are finished, click **Done**.