Creating an Itinerary

Objective: Explain how to create an Itinerary, used for M&IE expenses and setting Per Diem rates in Concur.

An Itinerary is required for any traveler going on a Domestic or Foreign trip, with the exception of local travel (no M&IE claimed) and employees going to CERN (uses special CERN expense types).

1. There are two ways to begin creating an Itinerary:
   a. After completing the Report Header, click Next at the bottom right of the page. This will bring up a Pop-Up window asking if you will be claiming Meals and/or Lodging. Click Yes to create an itinerary.

   ![Travel Allowances Pop-Up Window]

   b. If you have already gone to the expenses page, go to the Details dropdown and click New Itinerary.

   ![Concur Itinerary Page]
2. You are now on the *Create New Itinerary* window, where you will enter your business itinerary for your trip. **Enter** the **Departure City** and **Arrival City**, **Date**, and **Time** for the first business leg of your trip and **click** Save.

   **Note:** Do NOT include personal locations when filling this out. Use your actual business destination, NOT the airport location.

   ![Image](image_url)

   a. Repeat this process for each leg of the trip. Each entry will be added to the list on the left. When finished, **click Next**.

   ![Image](image_url)
3. You are now on the *Available Itineraries* page. Review your itinerary, and make changes if necessary.

   **Note:** To make changes, **select** your itinerary, and **click** *Edit*.

   **Note:** If you need to remove parts or all of your itinerary, **select** your itinerary, and **click** *Unassign*. **Select** it in the *Available Itineraries* at the bottom of the page and **click** *Delete*. **Click** the *Next* button at the bottom of the page to continue.
4. You are now on the Expenses & Adjustments page. **Check** the box of any meals that were provided for you or that you will not be claiming. If a day is personal, **check** the Exclude box next to the day to remove it from your claimed expenses. The Per Diem you will receive will be automatically reduced. **Click** the Create Expenses button to add your M&IE expenses to your report when finished.

![Expense report screenshot]

5. Complete the rest of the Expense report and **submit** when finished. If you need to make any changes to your itinerary, **select** the expense and **click** the Show fixed allowances option to edit.