

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					
?	Will you be claiming Meals and/or Lodging?				
		Yes No			

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

	SAP Concur		Requests Travel	Expense	Reporting -	App Center	
	Manage Expenses	P	rocess Reports				
Itinerary + New Expense Import Expenses	Details • Receipts • Print •						
Exceptions Expense Type Date Amount N/A	Totals Audit Trail						
Expenses Date • Expense Type Adding New Expense No Expenses Found	Approval Flow Comments Allocations Travel Allowances New Kinerary	& d	New Expense Expense Type To create a new expen Recently Use			w or type the expense type in the field above. To edit a	n existing expense, click the expens
	Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary		Lodging All Expense Typ 01. Trip Expenses CERN - Meals and In	es .	Personal Car Mileage 01. Trip Expenses Manual Adjustment	Taxi/Car Service/Rideshare/Train 02. Transportation Airline Fees	Airfare 02. Transportation Parking



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.

ravel Allowances	For Report: Itinerary			□ ×
Create New Itinerary	2 Available Itineraries 3 Exp	enses & Adjustments		
Itinerary Info Itinerary Name Itinerary	Selection USGSA Employee	×		
Add Stop Delete Ro	ows Import Rinerary		New Itinerary Stop	
Departure City No tinerary Rows Found		Arrival Rate Location	Departure Cty Date Time Arrival Cty Date Time Date Time Date Time Date Time Date Time Time Time Time Time Time Time Tim	

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*.

avel Allowances For Rep		ste			
Edit linerary 2 Available tinerari inerary Info tinerary Name Test	es 3 Expenses & Adjustmer Selection USGSA Employee Ht Innerary Arrival City	Arrival Rate Location DENVER COUNTY, US-CO, US SANTA CLARA COUNTY, U	New Itinerary Stop Departure City SLAC National Accelerator La Date Arrival City Date	boratory, California	
					Save
			Go to	Single Day Itineraries Next >>	Cancel



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.

Create New Itinerary 2 Available	e Itineraries 3 Expenses &	Adjustments		
signed Itineraries				
Edit Unassign	•			
Departure City	Date and Time .	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Itinerary				
SLAC National Accelerator Labo	05/14/2018 09:00 AM	Denver, Colorado	05/14/2018 01:00 PM	DENVER COUNTY, US-CO, US
Denver, Colorado	05/18/2018 04:00 PM	SLAC National Accelerator Labo	05/18/2018 06:00 PM	SANTA CLARA COUNTY, US-CA
vailable Itineraries	/			
Current Itineraries	Dete Assgn	Arrival City	Date and Time	Arrival Rate Location
Current Itineraries Departure City		Arrival City	Date and Time	Arrival Rate Location
Current Itineraries	Date and Time •	Arrival City NREL - National Renewable Ener		Arrival Rate Location
Current lineraries Departure City Itinerary: Domestic	Date and Time .		04/01/2018 10:00 AM	
Urrent lineraries Departure City Itinerary: Domestic SLAC National Accelerator Labo NREL - National Renewable Ener	Date and Time . 04/01/2018 08:00 AM 04/03/2018 10:00 AM	NREL - National Renewable Ener	04/01/2018 10:00 AM	UNITED STATES
Urrent lineraries Departure City Itinerary: Domestic SLAC National Accelerator Labo NREL - National Renewable Ener	Date and Time + 04/01/2018 08:00 AM 04/03/2018 10:00 AM Aeeting	NREL - National Renewable Ener	04/01/2018 10:00 AM 04/03/2018 12:00 PM	UNITED STATES
Urrent tineraries Departure City Itinerary: Domestic SLAC National Accelerator Labo NREL - National Renewable Ener Itinerary: Travel Managers M SLAC National Accelerator Labo	Date and Time + 04/01/2018 08:00 AM 04/03/2018 10:00 AM Aceting 04/23/2018 01:45 PM	NREL - National Renewable Ener SLAC National Accelerator Labo	04/01/2018 10:00 AM 04/03/2018 12:00 PM 04/23/2018 05:13 PM	UNITED STATES SANTA CLARA COUNTY, US-CA
Current tineraries Departure City Itinerary: Domestic SLAC National Accelerator Labo NREL - National Renewable Ener Itinerary: Travel Managers M SLAC National Accelerator Labo	Date and Time + 04/01/2018 08:00 AM 04/03/2018 10:00 AM Aceting 04/23/2018 01:45 PM	NREL - National Renewable Ener SLAC National Accelerator Labo NREL - National Renewable Ener	04/01/2018 10:00 AM 04/03/2018 12:00 PM 04/23/2018 05:13 PM	UNITED STATES SANTA CLARA COUNTY, US-CA UNITED STATES



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.

Create New Itinera	ry 2 Available Itinerarie	es 3 Expenses & Adju	stments			
Show dates from	to	Go				
Exclude All	Date/Location .	Breakfast Provided	Lunch Provided	Dinner Provided	Over 30 days	Allowance
	05/14/2018 Denver, Colorado					\$51.75
	05/15/2018 Denver, Colorado					\$69.00
	05/16/2018 Denver, Colorado					\$69.00
	05/17/2018 Denver, Colorado					\$69.00
	05/18/2018 Denver, Colorado					\$51.75

Exp	enses		Move * Delete	Copy View 🔹 🤇
	Date •	Expense Type	Amount	Requested
Add	ing New Expen	se		
	05/18/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$ 51.75	\$51.75
	05/17/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$53.00	\$53.00
	05/16/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$69.00	\$69.00
	05/15/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$21.00	\$21.00
	05/14/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$51.75	\$51.75

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.