

Creating an Itinerary

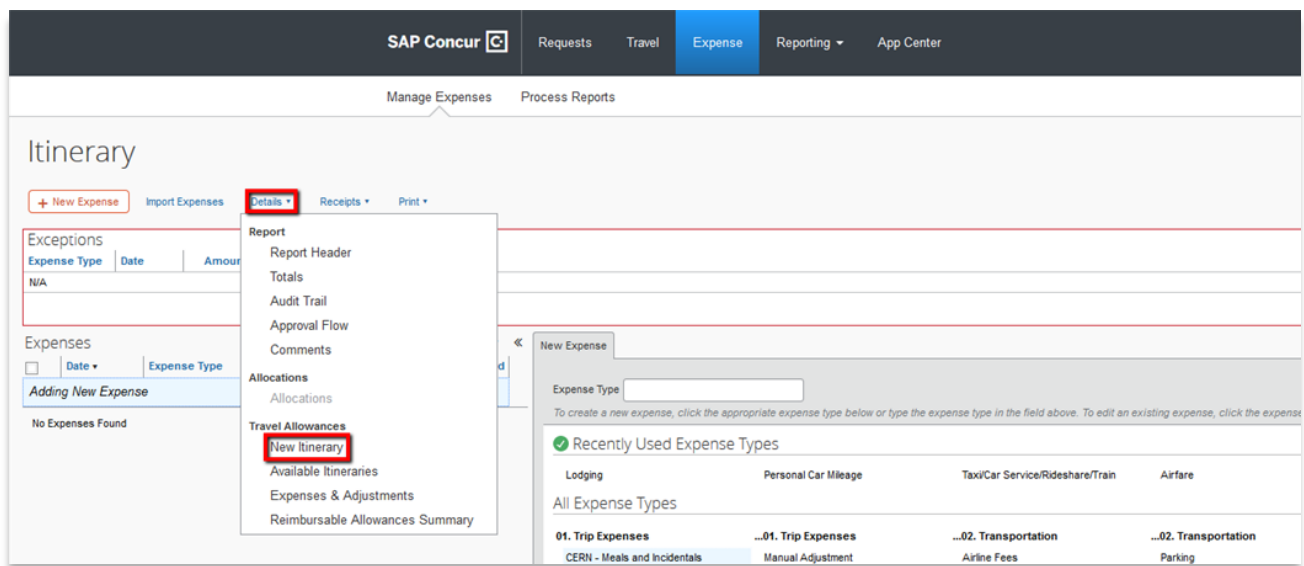
Objective: Explain how to create an Itinerary, used for M&IE expenses and setting Per Diem rates in Concur.

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.



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



- 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.

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

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
<input type="checkbox"/>	SLAC National Accelerator L...	Denver, Colorado	DENVER COUNTY, US-CO, US
<input type="checkbox"/>	Denver, Colorado	SLAC National Accelerator L...	SANTA CLARA COUNTY, U...

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.

Travel Allowances For Report: Itinerary

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned 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...

Available Itineraries

Current Itineraries

Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Domestic				
SLAC National Accelerator Labo...	04/01/2018 08:00 AM	NREL - National Renewable Ener...	04/01/2018 10:00 AM	UNITED STATES
NREL - National Renewable Ener...	04/03/2018 10:00 AM	SLAC National Accelerator Labo...	04/03/2018 12:00 PM	SANTA CLARA COUNTY, US-CA...
Itinerary: Travel Managers Meeting				
SLAC National Accelerator Labo...	04/23/2018 01:45 PM	NREL - National Renewable Ener...	04/23/2018 05:13 PM	UNITED STATES
NREL - National Renewable Ener...	04/26/2018 12:00 PM	SLAC National Accelerator Labo...	04/26/2018 01:46 PM	SANTA CLARA COUNTY, US-CA...

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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.

Travel Allowances For Report: Itinerary

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to

Exclude All <input type="checkbox"/>	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Over 30 days	Allowance
<input type="checkbox"/>	05/14/2018 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75
<input type="checkbox"/>	05/15/2018 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	05/16/2018 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	05/17/2018 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	05/18/2018 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75

Expenses <<

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	05/18/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$51.75	\$51.75
<input type="checkbox"/>	05/17/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$53.00	\$53.00
<input type="checkbox"/>	05/16/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$69.00	\$69.00
<input type="checkbox"/>	05/15/2018	Meals and Incidentals (M&IE) Denver, Colorado	\$21.00	\$21.00
<input type="checkbox"/>	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.