

**Objective:** This guide will explain how to create an Itinerary in Concur, which is used for setting per diem rates and calculating meals & incidental expenses (M&IE) for your trip.

Creating a travel itinerary in Concur is mandatory for both domestic and international trips. However, for local travel without any lodging expenses, an itinerary does not need to be created.

1. There are two methods to initiate itinerary creation:

- a. In the Report Header, **select** the appropriate *Trip Type*. Then navigate to the bottom of the window and **select** "Yes, I require Travel Allowance", then **click Next**.

**Report Header**

Test | \$0.00

\* Required field

Policy \*  
\*Pre Approved Trip

Report/Trip Name \*  
Test

Report/Trip Start Date  
05/13/2024

Report/Trip End Date  
05/16/2024

Trip Type \*  
Domestic

Report Id  
2A7B39F846044FA9BE03

Report Currency  
US, Dollar

Approval Status  
Not Submitted

Report Total  
0

Personal Expenses  
0

Amount Not Approved  
0

Amount Approved  
0

Amount Company Paid  
0

Amount Due Company  
0

Amount Due Employee  
0

Amount Due Company Card  
0

Total Amount Claimed  
0

Business Purpose \* 16/500  
Business Purpose

Project \* 1  
13161

Activity \* 2  
Y0001

WBS 3  
10.05.03.01.01

Fund 4  
YN0100000

Org  
(10047010) BSD Division Mgmt

Location  
Remote

Local Travel? ?

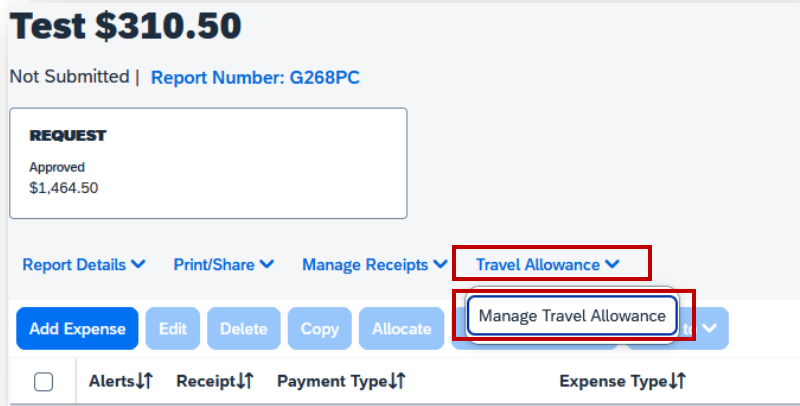
Comment 0/500

**Travel Allowance**  
Will you be claiming Meals and/or Lodging?  
 Yes, I require Travel Allowance  
 No, I do not require Travel Allowance

Next: Create report and add itinerary details for your travel allowances

Cancel **Next**

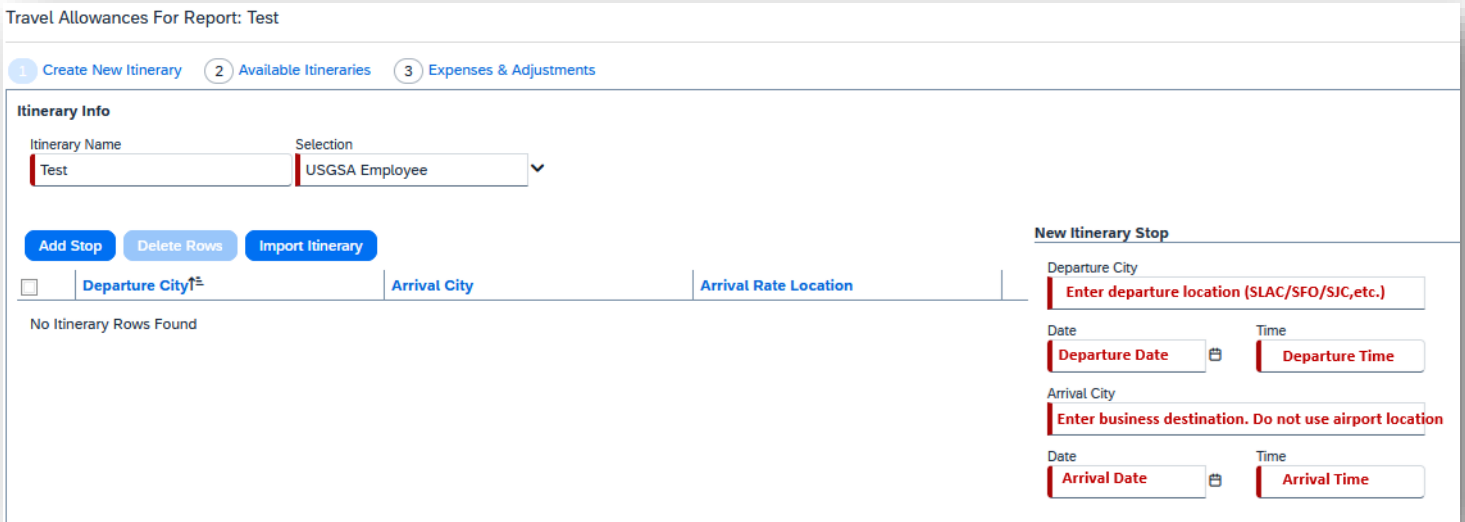
- b. If you have already navigated to the Expenses page, proceed to the *Travel Allowance* and **choose Manage Travel Allowance**.



2. You have now reached the "Create New Itinerary" window, where you will enter the business itinerary details for your trip. Provide the *Departure City* and *Arrival City*, along with the *Date* and *Time* for the first business segment of your journey and **click Save**.



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



3. Repeat this process for each leg of the trip. Each entry will be added to the list on the left. Once you have completed all entries, **click Save**. When finished, **click Next>>**.

The screenshot shows the 'Travel Allowances For Report: Test' interface with three steps: 1. Edit Itinerary, 2. Available Itineraries, and 3. Expenses & Adjustments. The 'Itinerary Info' section includes fields for 'Itinerary Name' (Test) and 'Selection' (USGSA Employee). Below are buttons for 'Add Stop', 'Delete Rows', and 'Import Itinerary'. A table lists two itinerary stops:

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Princeton, New Jersey 05/05/2024 01:00 PM	SLAC National Accelerator Laboratory, C... 05/05/2024 06:00 PM	SANTA CLARA COUNTY, US-CA, US
<input type="checkbox"/>	SLAC National Accelerator Laboratory, C... 06/01/2024 01:00 PM	Princeton, New Jersey 06/01/2024 06:00 PM	MERCER COUNTY, US-NJ, US

To the right, the 'New Itinerary Stop' form is visible with fields for 'Departure City', 'Date', 'Time', 'Arrival City', and another 'Date' and 'Time' pair. A red arrow points from the 'Arrival Rate Location' column of the table to the 'Departure City' field in the 'New Itinerary Stop' form. At the bottom right, a 'Save' button is highlighted with a red arrow. Below the main interface are buttons for 'Go to Single Day Itineraries', 'Next >>', and 'Cancel'.

4. You have reached the *Available Itineraries* page. Please review your itinerary and make any required adjustments. If everything looks correct, **click Next>>** and proceed to step number 5.



Note: To make changes, **select** to highlight the itinerary, and **click Edit**.



Note: If you need to eliminate parts or all of your itinerary, **select** your itinerary and **click Unassign**. Then, select it from the *Available Itineraries* at the bottom of the page and click Delete. Finally, **click the Done** button at the bottom of the page to proceed.

Travel Allowances For Report: Test

Create New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Assigned Itineraries

Edit Unassign

Departure City	Date and Time <sup>1</sup>	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Test				
SLAC National Accelerator Laboratory, Califo...	06/01/2024 01:00 PM	Princeton, New Jersey	06/01/2024 06:00 PM	MERCER COUNTY, US-NJ, US
Princeton, New Jersey	06/05/2024 01:00 PM	SLAC National Accelerator Laboratory, Califo...	06/05/2024 06:00 PM	SANTA CLARA COUNTY, US-CA, US

Available Itineraries

Current Itineraries Delete Assign

Departure City	Date and Time <sup>1</sup>	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Test				
SLAC National Accelerator Laboratory, Califo...	06/01/2024 01:00 PM	Princeton, New Jersey	06/01/2024 06:00 PM	MERCER COUNTY, US-NJ, US
Princeton, New Jersey	06/05/2024 01:00 PM	SLAC National Accelerator Laboratory, Califo...	06/05/2024 06:00 PM	SANTA CLARA COUNTY, US-CA, US

Done

5. You are now on the *Expenses & Adjustments* page. **Check the box for any meals that were provided or that you will not be claiming.** For **personal days**, **check the Exclude box** next to the corresponding day to **remove it** from your claimed expenses. The Per Diem amount will be automatically adjusted. When finished, **click the Create Expenses** button to add your M&IE expenses to your report.

The screenshot shows the 'Expenses & Adjustments' step in the SAP Concur interface. At the top, there are three tabs: '1 Create New Itinerary', '2 Available Itineraries', and '3 Expenses & Adjustments'. Below the tabs, there is a date range selector with 'Show dates from' and 'to' fields, and a 'Go' button. A table lists travel dates and locations with columns for 'Breakfast Provided', 'Lunch Provided', 'Dinner Provided', 'Over 30 days', and 'Allowance'. The 'Exclude All' checkbox is checked. The 'Create Expenses' button is highlighted with a red box.

Exclude All <input checked="" type="checkbox"/>	Date/Location†	Breakfast Provided	Lunch Provided	Dinner Provided	Over 30 days	Allowance
<input type="checkbox"/>	06/01/2024 Princeton, New Jersey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75
<input type="checkbox"/>	06/02/2024 Princeton, New Jersey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	06/03/2024 Princeton, New Jersey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	06/04/2024 Princeton, New Jersey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	06/05/2024 Princeton, New Jersey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75

6. Complete the rest of the expense report and submit it when finished. If you need to make any changes to your itinerary, refer to the instructions provided in [step 1b](#).