

How to Add an Itinerary

The system keeps telling me I can't submit my hotel expenses until I complete an itinerary. I can't find where to add my per diem expense. What do I do?

General Information:

An itinerary is a listing of points of travel for a trip. It will include the location and time when you began travel, each location where you stayed overnight with times of entry and exit, and the location at when the trip ended. It does not include temporary layovers during the trip due to public transportation stops.

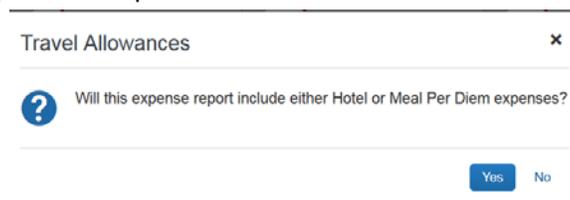
An itinerary is necessary for the system to calculate your travel allowance. The travel allowance process is two-fold: (1) it determines the hotel rate limit for the location to which you traveled, and (2) it calculates your per diem for you.

When you begin your expense report, you are asked the question “Will this expense report include either Hotel and/or Meal Per Diem expenses?” If you answer yes, you will be taken to the itinerary page to create your itinerary. This will allow the system to calculate your expenses; the procedure is described under “Adding an itinerary up-front” below. If you answer no, you will not be directed to the creation of the itinerary; if that happens and you do have hotel or per diem to claim, you will need to follow the instructions listed under “Adding an itinerary after-the-fact” below.

Note: Itineraries can be imported from your airline or hotel. We do not recommend that you import your itinerary, because there will be multiple edits required.

Adding an itinerary up-front:

This procedure covers the steps needed to create an itinerary when you answer yes to “Will this expense report include either Hotel and/or Meal Per Diem expenses?” You will see this question pop up immediately after you complete the report header:



The screenshot shows a modal dialog box titled "Travel Allowances" with a close button (x) in the top right corner. Below the title bar, there is a question mark icon followed by the text "Will this expense report include either Hotel or Meal Per Diem expenses?". At the bottom of the dialog, there are two buttons: "Yes" and "No".

If you do not answer yes to this question and you later discover you needed an itinerary, proceed to “Adding an itinerary after-the-fact” below.

You will be taken to this screen if you answered yes.

Travel Allowances For Report: test itinerary

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info
Itinerary Name: test itinerary

Add Stop Cancel Itinerary Import Itinerary

Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

New Itinerary Stop

Departure City: [input]
Date: [input] Time: [input]
Arrival City: [input]
Date: [input] Time: [input]

Save

Go to Single Day Itineraries Next >> Cancel

On this page, enter your departure city, date, and time, as well as your arrival city, date, and time for the first leg of your trip. Remember that temporary stops made to change planes, etc., should not be entered. It is not recommended that you use the Import Itinerary feature. Click Save.

You will be taken to another screen to complete the next leg of your trip. Continue to do this, saving each time, until you complete the return returning you to your original departure city. Save the last leg, and then click next. Your completed itinerary should look something like this.

Travel Allowances For Report: test itinerary

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info
Itinerary Name: test itinerary

Add Stop Cancel Itinerary Import Itinerary

Departure City	Arrival City	Arrival Rate Location
Norman, Oklahoma 05/05/2016 07:00 AM	Tulsa, Oklahoma 05/05/2016 09:00 AM	TULSA COUNTY, US-OK, US
Tulsa, Oklahoma 05/06/2016 06:00 PM	Norman, Oklahoma 05/06/2016 05:00 PM	CLEVELAND COUNTY, US-OK, US

New Itinerary Stop

Departure City: Norman, Oklahoma
Date: [input] Time: [input]
Arrival City: [input]
Date: [input] Time: [input]

Save

Go to Single Day Itineraries Next >> Cancel

You will be taken to this page. You will note that the itinerary you just created is in the Assigned Itineraries section. Click Next.

Travel Allowances For Report: test itinerary

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: test itinerary				
Norman, Oklahoma	05/05/2016 07:00 AM	Tulsa, Oklahoma	05/05/2016 09:00 AM	TULSA COUNTY, US-OK, US
Tulsa, Oklahoma	05/06/2016 06:00 PM	Norman, Oklahoma	05/06/2016 05:00 PM	CLEVELAND COUNTY, US-OK, US

Available Itineraries

Current Itineraries [dropdown] Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: test anchorage				
Norman, Oklahoma	04/29/2016 03:00 AM	Anchorage, Alaska	04/29/2016 06:00 AM	ANCHORAGE [INCL. NAV/ RES], ...
Anchorage, Alaska	05/01/2016 03:00 AM	Norman, Oklahoma	05/01/2016 12:00 PM	CLEVELAND COUNTY, US-OK, US

<< Previous Next >>

You will be taken to the Expenses and Adjustments page. On this page, select the meals that were provided by someone else during the trip. Before you mark a provided meal, it will show the per diem you are allotted for the time you spent in travel status.

Travel Allowances For Report: test 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	Allowance
<input type="checkbox"/>	05/05/2016 Tulsa, Oklahoma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.00
<input type="checkbox"/>	05/06/2016 Tulsa, Oklahoma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$25.50

Once you have marked your meals, your per diem will be reduced according to policy.

Travel Allowances For Report: test 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	Allowance
<input type="checkbox"/>	05/05/2016 Tulsa, Oklahoma	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$38.25
<input type="checkbox"/>	05/06/2016 Tulsa, Oklahoma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$25.50

Special note: We must adhere to the State Travel Reimbursement Act. As a result, we had to modify the way Concur normally calculates per diem. One of the side effects of this modification is that sometimes there is not enough per diem shown on the last day of travel to cover the meals that were provided. This is because the first day of travel contains the additional per diem allowed. If you encounter that situation, mark a previous day's meal instead of marking the final day.

Once you have your meals marked, click Create Expenses. The system will add you per diem expenses to your report. It will also store the hotel rate allowance so that you can add your hotel expense to the report. You are now finished creating your itinerary.

[Import Expenses](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses [View](#) <<

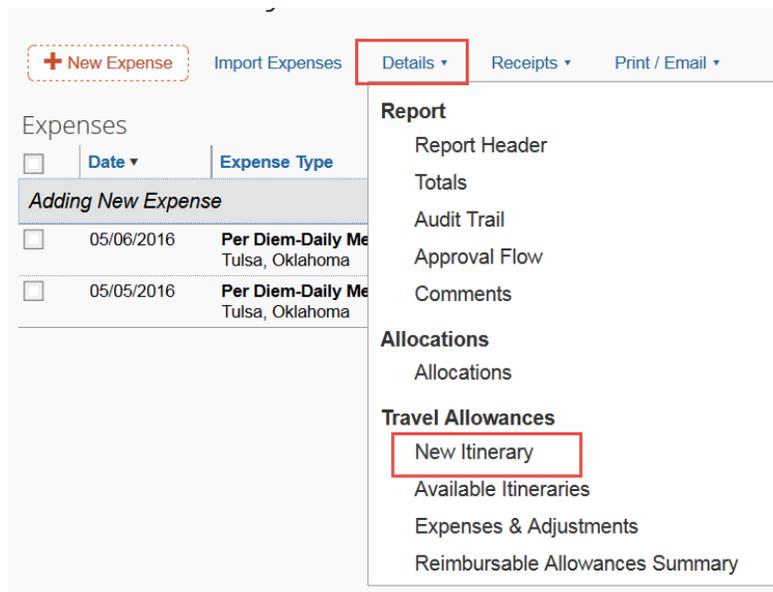
<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	05/06/2016	Per Diem-Daily Meals & Incidenta Tulsa, Oklahoma	\$25.50	\$25.50
<input type="checkbox"/>	05/05/2016	Per Diem-Daily Meals & Incidenta Tulsa, Oklahoma	\$51.00	\$51.00

Adding an itinerary after-the-fact:

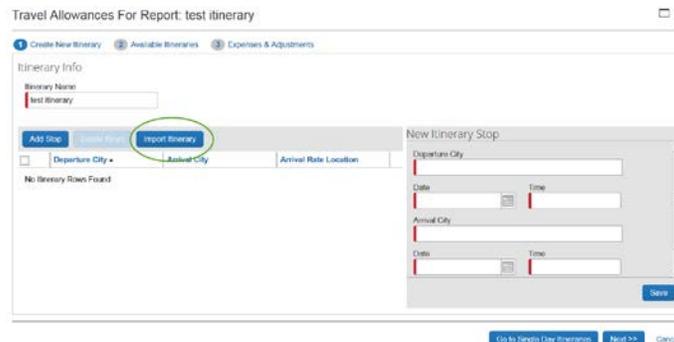
If you do not answer “yes” to the question “Will this expense report include either Hotel and/or Meal Per Diem expenses?”, you may find that you later want to add per diem or hotel to your report.

If you immediately realize that you should have answered yes, and you began your expense report from the “expense” link on your approved request, we recommend that you immediately delete the current report and start over on your report, answering “yes” this time. Since most of your header information is copied from your request, it will be much faster to start over. If you do not realize it immediately, follow the instructions below.

To add an itinerary to an expense report, open the report. Click Details, then click on New Itinerary.



You will be taken to this screen.



On this page, enter your departure city, date, and time, as well as your arrival city, date, and time for the first leg of your trip. Remember that temporary stops made to change planes, etc., should not be entered. It is not recommended that you use the Import Itinerary feature. Click Save.

You will be taken to another screen to complete the next leg of your trip. Continue to do this, saving each time, until you complete the screen returning you to your original departure city. Save the last leg, and then click next. Your completed itinerary should look something like this.

Departure City	Arrival City	Arrival Rate Location
Norman, Oklahoma 05/05/2016 07:00 AM	Tulsa, Oklahoma 05/05/2016 09:00 AM	TULSA COUNTY, US-OK, US
Tulsa, Oklahoma 05/06/2016 06:00 PM	Norman, Oklahoma 05/06/2016 05:00 PM	CLEVELAND COUNTY, US-OK, US

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Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
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Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Norman, Oklahoma	04/29/2016 03:00 AM	Anchorage, Alaska	04/29/2016 06:00 AM	ANCHORAGE (INCL. NAV/RES), AK
Anchorage, Alaska	05/01/2016 03:00 AM	Norman, Oklahoma	05/01/2016 12:00 PM	CLEVELAND COUNTY, US-OK, US

You will be taken to the Expenses and Adjustments page. On this page, select the meals that were provided by someone else during the trip. Before you mark a provided meal, it will show the per diem you are allotted for the time you spent in travel status.

Exclude All	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	05/05/2016 Tulsa, Oklahoma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.00
<input type="checkbox"/>	05/06/2016 Tulsa, Oklahoma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$25.50

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Travel Allowances For Report: test itinerary ✕

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Show dates from to

Exclude All <input type="checkbox"/>	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	05/05/2016 Tulsa, Oklahoma	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$38.25
<input type="checkbox"/>	05/06/2016 Tulsa, Oklahoma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$25.50

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Expenses <<

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	05/06/2016	Per Diem-Daily Meals & Incidenta Tulsa, Oklahoma	\$25.50	\$25.50
<input type="checkbox"/>	05/05/2016	Per Diem-Daily Meals & Incidenta Tulsa, Oklahoma	\$51.00	\$51.00