

State Accounting Office

TeamWorks: Travel and Expense System

**TTE: How to Enter
Travel Allowances –
No Overnight Stay**



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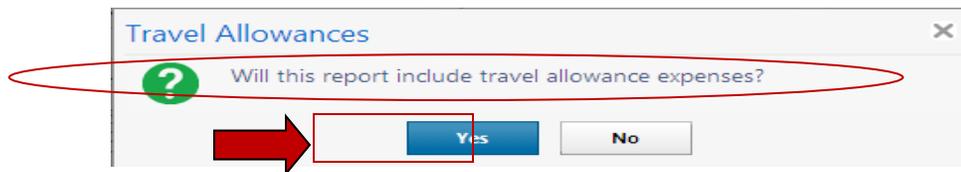
Revision Table

Date	Description
09/25/13	Updated for change in Travel Allowance entry process. Removed references to Selection field. Added instruction on use of final business locations with (Single Day) in the name for Single Day Travel Allowances to calculate properly. Travel Allowances with and without overnight stays can now be on the same expense report. Added instruction on adjusting a specific meal period on an existing Travel Itinerary on an existing Expense Report.
01/17/14	Modified (Single Day) location information to say they should be used in all entries for single day trips but must be used in final destination for single day trips to reflect correct meal allowance.

Add Travel Allowances When Creating a New Expense Report

NOTE: You may now add Travel Allowances for travel with or without an overnight stay on the same expense report.! Simply choose the Standard Itinerary for Travel Allowances accompanied with overnight stay(s) or Single Day Itinerary for Travel Allowances where no overnight occurred. Additionally for Single Day Travel ONLY use locations with (Single Day) in the location name for the final business destination of the day as described below.

- On the My Concur in the Expense Report or Active Work section click on **New Expense Report**
- Complete the required **Report Header** information
- If required, link any **Travel Requests** to the Expense Report
 - Click **Add** under **Travel Request** and select the appropriate Travel Request(s) to link to the Expense Report
 - Click **Save** and the **Travel Allowances** dialogue box will appear.
 - Click **Yes**



NOTE: The change to accommodate the new Statewide Travel Policy regarding Meals with no Overnight Duration became effective 7/1/13 with the new Statewide Travel Policy.

- Click on **Go to Single Day Itineraries** if the Single Day Itinerary entry form does not display.

Travel Allowances For Report: InState Travel 9/1 to 15

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name
InState Travel 9/1 to 15

Add Stop Delete Rows

<input type="checkbox"/>	Departure City ^	Arrival City	Arrival Rate Location
No Itinerary Rows Found			

New Itinerary Stop

Depart from (city)
Date
Time
Arrive in (city)
Date
Time

Save

Go to Single Day Itineraries Next >> Cancel

- The **Single Day Itinerary** Entry Form Opens
- Enter the date you want to begin entering information for in **Choose Start Date**.
- Click **Go** to open the data entry screen for the chosen dates.

Travel Allowances For Report: InState Travel 9/1 to 15

1 Single Day Itineraries 2 Available Itineraries 3 Expenses & Adjustments

Choose start date 09/16/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours
<input type="checkbox"/>	09/16/2013 Mon...							
<input type="checkbox"/>	09/17/2013 Tues...							
<input type="checkbox"/>	09/18/2013 Wed...							
<input type="checkbox"/>	09/19/2013 Thur...							
<input type="checkbox"/>	09/20/2013 Friday							
<input type="checkbox"/>	09/21/2013 Satu...							
<input type="checkbox"/>	09/22/2013 Sun...							

Save Itineraries

Go to Standard Itinerary Next >> Cancel

- The date you selected will now display – 7 days display at once.

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Choose start date: 09/08/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours
<input type="checkbox"/>	09/08/2013 Sun...							
	09/09/2013 Mo...	An itinerary already exists for this day						
<input type="checkbox"/>	09/10/2013 Tues...							
<input type="checkbox"/>	09/11/2013 Wed...							
<input type="checkbox"/>	09/12/2013 Thur...							
<input type="checkbox"/>	09/13/2013 Friday							
<input type="checkbox"/>	09/14/2013 Satu...							

Save Itineraries

Go to Standard Itinerary Cancel

- If Itineraries already display, as in our example, that means those days were already used to claim Travel Allowance on this or another Expense Report
- For each day you want to claim a Travel (Meal Per Diem) Allowance enter your starting location for that day in **Start Location** and click the **Tab** key.
 - You should select locations with (Single Day) in the location name
- Enter the time (using am or pm) you left in **Depart** and click the **Tab** key.
- Enter your last business destination of the day in **End Location** using locations with (Single Day) in the name and click the **Tab** key.
 - ✓ **Note:** You must select the destination city with (Single Day) after the name. If you select a destination city that does not have (Single Day) after the name you will not receive the correct Travel Allowance,
- Enter the time you arrived at this final location in **Arrive** and click the **Tab** key.
- Enter the time you left this location in **Depart** and click the **Tab** key.
- Enter the time you arrived home in **Back** and click the **Tab** key.
 - ✓ **Note:** The system will calculate your travel status time under **Hours**.
- After you have entered all the days you are claiming, click **Save Itineraries**.
 - ✓ **Note:** You can go back in and add additional days in a different week later
 - ✓ **NOTE:** Any days where meals have already been requested on ANY expense report for the date period displayed will show the message "An itinerary already exists for this day." You cannot claim meals for the same day twice.

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Choose start date 09/08/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours	
<input type="checkbox"/>	09/08/2013 Sun...								
	09/09/2013 Mo...	An itinerary already exists for this day							
<input type="checkbox"/>	09/10/2013 Tues...								
<input type="checkbox"/>	09/11/2013 Wed...	Atlanta, Georgia	7:00 AM	Augusta (Single Day), Georgia	9:00 AM	6:00 PM	7:00 PM	12:00	
<input type="checkbox"/>	09/12/2013 Thur...	Atlanta, Georgia	6:00 AM	Moultrie (Single Day), Georgia	9:00 AM	5:00 PM	8:00 PM	14:00	
<input type="checkbox"/>	09/13/2013 Friday								
<input type="checkbox"/>	09/14/2013 Satu...								

Save Itineraries

Go to Standard Itinerary Cancel

- Click the **Expenses and Adjustments** tab

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Choose start date 09/08/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours	
<input type="checkbox"/>	09/08/2013 Sun...								
	09/09/2013 Mo...	An itinerary already exists for this day							
<input type="checkbox"/>	09/10/2013 Tues...								
	09/11/2013 Wed...	Itinerary has been created							

- Click on any meal that was provided to you for any days you reported. The system will adjust your reimbursement amount for that meal period.
- Click on **Create Expenses**.

Travel Allowances For Report: InState Travel 9/1 to 15

1 Single Day Itineraries 2 Available Itineraries 3 Expenses & Adjustments 4 Reimbursable Allowances Summary

Show dates from to Go

Exclude All <input type="checkbox"/>	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/11/2013 Augusta (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$16.00
<input type="checkbox"/>	09/12/2013 Moultrie (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00



- Expense Entries called Fixed Meals will be created in your expense report for each day you claimed with the allowable reimbursement amounts.

My Concur Request Expense Reporting Administration Profile

View Reports New Expense Report View Receipt Store Process Reports Process Receipts

InState Travel 9/1 to 15 Delete Report Submit Report

Details Receptions Print / Email

Expenses	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	09/12/2013	Fixed Meals Moultrie (Single Day), Georgia	\$28.00	\$28.00
<input type="checkbox"/>	09/11/2013	Fixed Meals Augusta (Single Day), Georgia	\$16.00	\$16.00

TOTAL AMOUNT \$44.00 TOTAL REQUESTED \$44.00

New Expense Receipt Store

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Personal Car Mileage
- Office Supplies
- Meals- Actual Meal Allowance (Domestic)
- Hotel
- Rental Cars Only

All Expense Types

Business Promotions

- Other Promotional Expense
- Trade Shows

Communications

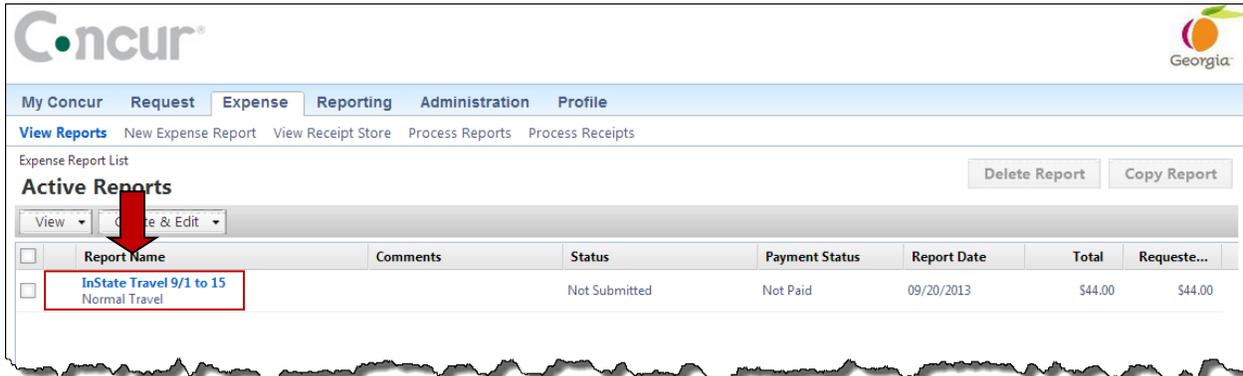
- Cellular Phone
- Internet Charges
- Local Phone

NOTE: When entering Travel Allowance associated with travel status time with no overnight stay, you should use locations with (Single Day) in the name, however, you MUST use locations that have (Single Day) after the location name for the final business destination of the day. If you do not, your Travel Allowance will not be incorrect.

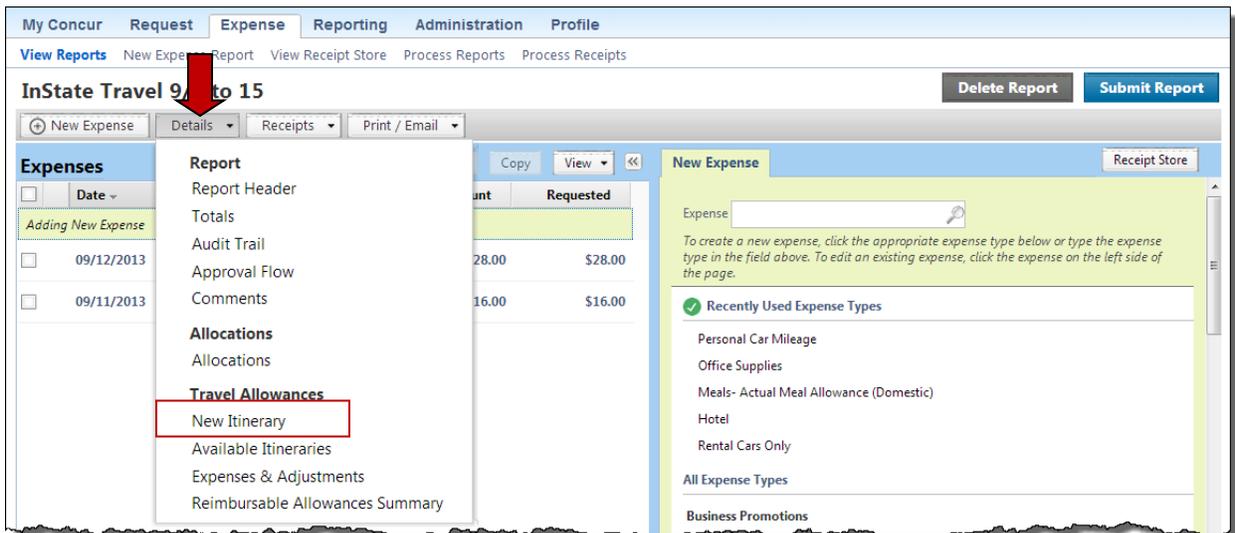
Add Travel Allowances to an EXISTING Expense Report

NOTE: You may add Travel Allowances for travel with or without an overnight stay on the same expense report! Simply choose the Standard Itinerary for Travel Allowances accompanied with overnight stay(s) or Single Day Itinerary for Travel Allowances where no overnight occurred. Additionally for Single Day Travel ONLY use locations with (Single Day) in the location name.

- On the My Concur page in the Expense Report or Active Work section click on an existing Expense Report to open it.



- Click on the **Details** tab.
- Select **New Itinerary** under the Travel Allowances section



- The system opens to the last Meal Type used:
 - ✓ **Note:** You cannot mix expenses for In State, Out of State and International Travel on the same Expense Report.
- Click on **Go to Single Day Itineraries** if necessary
- If the dates displayed in Travel Allowance Single Day Entry are not the dates you need to access, change the date in **Choose Start Date** and click on **Go** to open the data entry screen to the correct dates.
 - For each day you want to claim a Travel (Meal Per Diem) Allowance enter your starting location for that day in **Start Location** and click the **Tab** key.

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Choose start date 09/08/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours
<input type="checkbox"/>	09/08/2013 Sun...							
	09/09/2013 Mo...	An itinerary already exists for this day						
<input type="checkbox"/>	09/10/2013 Tues...							
	09/11/2013 Wed...	Itinerary has been created						
	09/12/2013 Thu...	Itinerary has been created						
<input type="checkbox"/>	09/13/2013 Friday							
<input type="checkbox"/>	09/14/2013 Satu...							

Save Itineraries

Go to Standard Itinerary Cancel

- Enter the location you started from in the Start Location – use location names with (Single Day) in the name
- Enter the time (using am or pm) you left in **Depart** and click the **Tab** key.
- Enter your last business location (Single Day) of the day in **End Location** and click the **Tab** key.
 - ✓ **Note:** You MUST choose a location with (Single Day) displayed after the location name. If you do not the Per Diem will not calculate the correct meal allowance.
- Enter the time you arrived at this final location in **Arrive** and click the **Tab** key.
- Enter the time you left this location in **Depart** and click the **Tab** key.
- Enter the time you arrived home in **Back** and click the **Tab** key.
 - ✓ **Note:** The system will calculate your travel status time under **Hours**.
- When you have entered all the days you are claiming click **Save Itineraries**.

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Choose start date 09/08/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours
<input type="checkbox"/>	09/08/2013 Sun...							
<input type="checkbox"/>	09/09/2013 Mon...							
<input type="checkbox"/>	09/10/2013 Tues...							
	09/11/2013 Wed...	An itinerary already exists for this day						
	09/12/2013 Thu...	An itinerary already exists for this day						
<input type="checkbox"/>	09/13/2013 Friday	Atlanta, Georgia	7:00 AM	Ringgold (Single Day), Georgia	9:00 AM	5:00 PM	7:00 PM	12:00
<input type="checkbox"/>	09/14/2013 Satu...							

Save Itineraries

Go to Standard Itinerary Cancel

- Click on the **Expenses & Adjustments** tab at the top of the window
- Click on any meals that were provided for you
- Click on **Update Expenses**.

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Show dates from to Go

Exclude All	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/11/2013 Augusta (Single Day), Ge...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$16.00
<input type="checkbox"/>	09/12/2013 Moultrie (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00
<input type="checkbox"/>	09/13/2013 Ringgold (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00

Update Expenses Cancel

- An Expense Entry called **Fixed Meals** will be added to your expense report for each day you claimed and were eligible for according to the Travel Policy.

Welcome, **Donna Fitzgerald** [You are administering for: [Yourself](#)] Help | Log Out

Concur Georgia

My Concur **Request** Expense Reporting Administration Profile

[View Reports](#) [New Expense Report](#) [View Receipt Store](#) [Process Reports](#) [Process Receipts](#)

InState Travel 9/1 to 15 **Delete Report** **Submit Report**

[New Expense](#) [Details](#) [Receipts](#) [Print / Email](#)

<input type="checkbox"/>	Date	Expense	Amount	Requested
Expenses Move Delete Copy View				
<i>Adding New Expense</i>				
<input type="checkbox"/>	09/13/2013	Fixed Meals Ringgold (Single Day), Georgia	\$28.00	\$28.00
<input type="checkbox"/>	09/12/2013	Fixed Meals Moultrie (Single Day), Georgia	\$28.00	\$28.00
<input type="checkbox"/>	09/11/2013	Fixed Meals Augusta (Single Day), Georgia	\$16.00	\$16.00
			TOTAL AMOUNT	TOTAL REQUESTED
			\$72.00	\$72.00

New Expense Receipt Store

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Personal Car Mileage
- Office Supplies
- Meals- Actual Meal Allowance (Domestic)
- Hotel
- Rental Cars Only

All Expense Types

Business Promotions

- Other Promotional Expense**
- Trade Shows

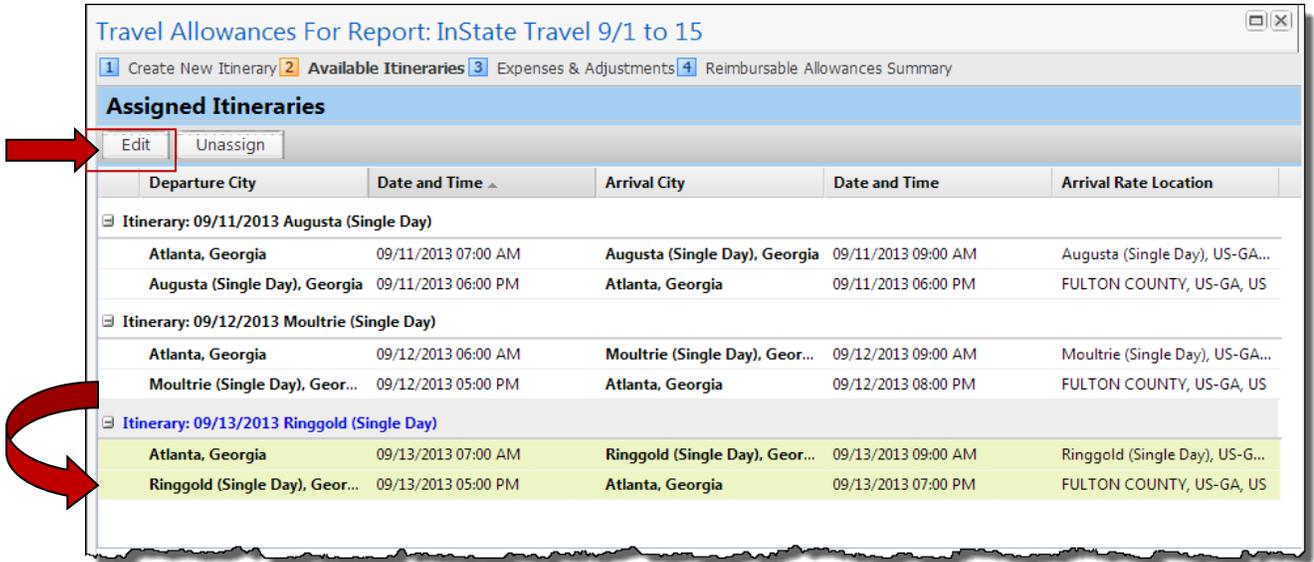
Communications

- Cellular Phone
- Internet Charges
- Local Phone

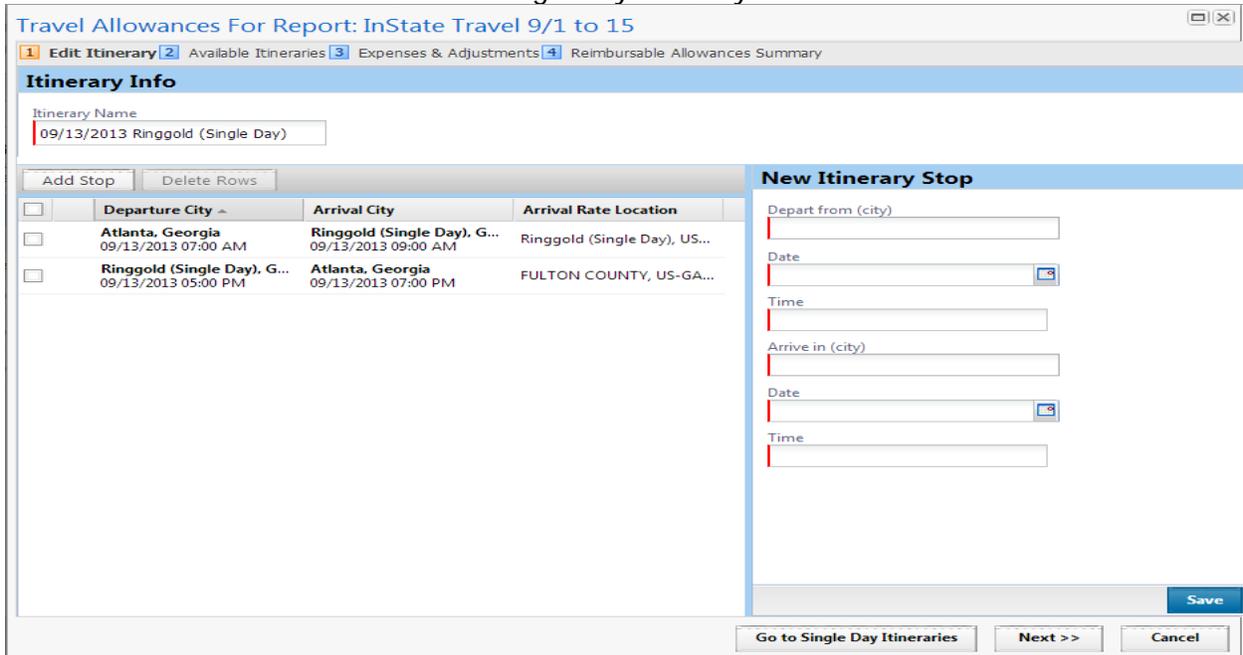
Correct a Travel Allowance Itinerary Entry

Sometimes the easiest way to fix a problem with a Travel Allowance is to delete it and re-enter it. However you do have the option to Edit a Travel Allowance Itinerary to correct it or Unassign a Travel Allowance Itinerary to delete the Travel Allowance Itinerary completely or link it to a different Expense Report.

- **EDIT**
 - To Edit a Travel Allowance Itinerary
 - Select the entry in **Assigned Itineraries**
 - Click on **Edit**.



- The Standard Itinerary from opens. DO NOT SWITCH TO Single Day Itinerary
 - The Single Day Itinerary is edited from this form.



- Click on the checkbox next to leg of a trip to edit it.
 - If a leg was missing enter it in New Itinerary Stop.
 - When editing for a single day trip, you use location names containing (Single Day) to calculate the correct allowance.
- The data for the item you checked will appear in **Edit Itinerary Stop**.

Travel Allowances For Report: InState Travel 9/1 to 15

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments 4 Reimbursable Allowances Summary

Itinerary Info

Itinerary Name
09/13/2013 Ringgold (Single Day)

Add Stop Delete Rows

<input type="checkbox"/>	Departure City ^	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Atlanta, Georgia 09/13/2013 07:00 AM	Ringgold (Single Day), G... 09/13/2013 09:00 AM	Ringgold (Single Day), US...
<input checked="" type="checkbox"/>	Ringgold (Single Day), G... 09/13/2013 05:00 PM	Atlanta, Georgia 09/13/2013 07:00 PM	FULTON COUNTY, US-GA...

Edit Itinerary Stop

Depart from (city)
Ringgold (Single Day), Georgia

Date
09/13/2013

Time
05:00 PM

Arrive in (city)
Atlanta, Georgia

Date
09/13/2013

Time
07:00 PM

Save

Go to Single Day Itineraries Next >> Cancel

- Correct the field that is in error.
- Click **Save**
- Click **Next** and make certain the Itinerary item is correct.

Travel Allowances For Report: InState Travel 9/1 to 15

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments 4 Reimbursable Allowances Summary

Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: 09/11/2013 Augusta (Single Day)				
Atlanta, Georgia	09/11/2013 07:00 AM	Augusta (Single Day), Georgia	09/11/2013 09:00 AM	Augusta (Single Day), US-GA...
Augusta (Single Day), Georgia	09/11/2013 06:00 PM	Atlanta, Georgia	09/11/2013 06:00 PM	FULTON COUNTY, US-GA, US
Itinerary: 09/12/2013 Moultrie (Single Day)				
Atlanta, Georgia	09/12/2013 06:00 AM	Moultrie (Single Day), Geor...	09/12/2013 09:00 AM	Moultrie (Single Day), US-GA...
Moultrie (Single Day), Geor...	09/12/2013 05:00 PM	Atlanta, Georgia	09/12/2013 08:00 PM	FULTON COUNTY, US-GA, US
Itinerary: 09/13/2013 Ringgold (Single Day)				
Atlanta, Georgia	09/13/2013 07:00 AM	Ringgold (Single Day), Geor...	09/13/2013 09:00 AM	Ringgold (Single Day), US-G...
Ringgold (Single Day), Geor...	09/13/2013 05:00 PM	Atlanta, Georgia	09/13/2013 08:00 PM	FULTON COUNTY, US-GA, US

Available Itineraries

Current Itineraries

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

- Click **Next**
- Adjust for provided meals if necessary.
- Click **Create Expenses**

Travel Allowances For Report: InState Travel 9/1 to 15

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments 4 Reimbursable Allowances Summary

Show dates from to

Exclude All <input type="checkbox"/>	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/11/2013 Augusta (Single Day), Ge...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$36.00
<input type="checkbox"/>	09/12/2013 Moultrie (Single Day), Ge...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00
<input type="checkbox"/>	09/13/2013 Ringgold (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00

- The Expense Report will be updated for the change.

Welcome, Donna Fitzgerald [You are administering for: Yourself] Help | Log Out

Concur Georgia

My Concur Request Expense Reporting Administration Profile

View Reports New Expense Report View Receipt Store Process Reports Process Receipts

InState Travel 9/1 to 15 Delete Report Submit Report

New Expense Details Receipts Print / Email

Expenses	Move	Delete	Copy	View	Receipt Store
<input type="checkbox"/>	Date	Expense	Amount	Requested	
Adding New Expense					
<input type="checkbox"/>	09/13/2013	Fixed Meals Ringgold (Single Day), Georgia	\$28.00	\$28.00	
<input type="checkbox"/>	09/12/2013	Fixed Meals Moultrie (Single Day), Georgia	\$28.00	\$28.00	
<input type="checkbox"/>	09/11/2013	Fixed Meals Augusta (Single Day), Georgia	\$36.00	\$36.00	
			TOTAL AMOUNT	TOTAL REQUESTED	
			\$92.00	\$92.00	

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Personal Car Mileage
- Office Supplies
- Meals- Actual Meal Allowance (Domestic)
- Hotel
- Rental Cars Only

All Expense Types

Business Promotions

- Other Promotional Expense
- Trade Shows

Communications

- Cellular Phone
- Internet Charges
- Local Phone

- **UNASSIGN**

- Mark a Travel Allowance Itinerary for further adjustment
 - On the My Concur page in the Expense Report or Active Work section click on the existing Expense Report with the incorrect Travel Allowance
 - Click on the **Details** tab
 - Select **Available Itineraries** from Travel Allowances section

welcome, Donna Fitzgerald [you are administering for: yourself] Help | Log Out

Concur Georgia

My Concur Request Expense Reporting Administration Profile

View Reports New Expense Report View Receipt Store Process Reports Process Receipts

InState Travel 9/1 to 15 Delete Report Submit Report

New Expense Details Receipts Print / Email

Expenses	Report	Amount	Requested
<input type="checkbox"/> 09/13/2013	Report Header	28.00	\$28.00
<input type="checkbox"/> 09/12/2013	Totals	28.00	\$28.00
<input type="checkbox"/> 09/11/2013	Audit Trail	16.00	\$16.00
	Approval Flow		
	Comments		
	Allocations		
	Allocations		
	Travel Allowances		
	New Itinerary		
	Available Itineraries		
	Expenses & Adjustments		
	Reimbursable Allowances Summary		

TOTAL AMOUNT **\$72.00** TOTAL REQUESTED **\$72.00**

<https://implementation.concursolutions.com/Expense/Client/default.asp>

- Locate the Travel Allowance Entry in the **Assigned Itineraries** section
NOTE: If entered properly each Itinerary has 2 lines and if it only has 1 line you may get a system error message that won't let you process the itinerary.
- Click on the name of the problem entry to highlight it
- Click **Unassign**

Travel Allowances For Report: InState Travel 9/1 to 15

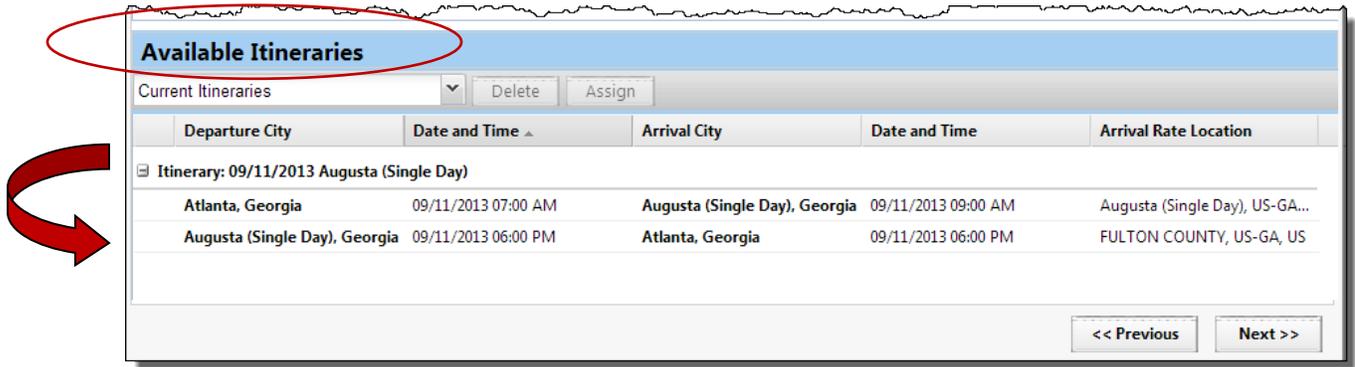
Create New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Assigned Itineraries

Edit Unassign

Itinerary	Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: 09/11/2013 Augusta (Single Day)					
	Atlanta, Georgia	09/11/2013 07:00 AM	Augusta (Single Day), Georgia	09/11/2013 09:00 AM	Augusta (Single Day), US-GA...
	Augusta (Single Day), Georgia	09/11/2013 06:00 PM	Atlanta, Georgia	09/11/2013 06:00 PM	FULTON COUNTY, US-GA, US
Itinerary: 09/12/2013 Moultrie (Single Day)					
	Atlanta, Georgia	09/12/2013 06:00 AM	Moultrie (Single Day), Georgia	09/12/2013 09:00 AM	Moultrie (Single Day), US-GA...

- The Itinerary moves to **Available Itineraries**



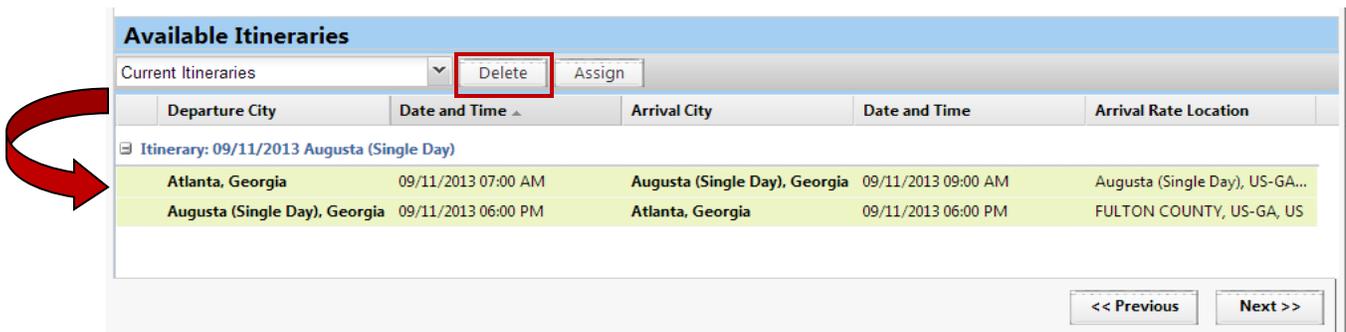
- In **Available Itineraries** select the Travel Allowance Itinerary
- The Travel Allowance Itinerary is now marked for further adjustment.

NOTE:

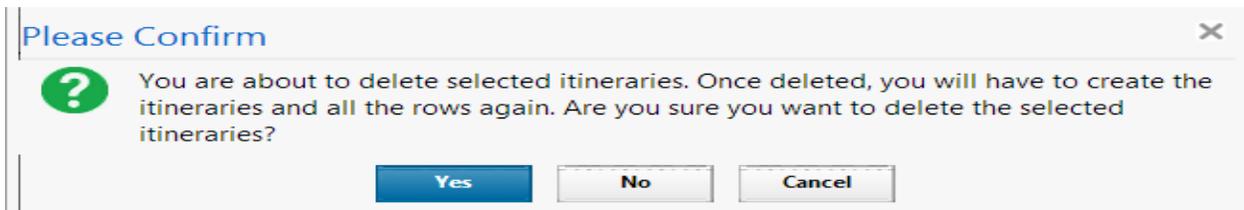
Go to Delete or Link an unassigned Travel Allowance Itinerary to another Expense Report.

- **DELETE**

- To Delete a Travel Allowance
 - Select the Travel Allowance Itinerary to be deleted by clicking on the Itinerary name. This will highlight it.
 - Click **Delete**.



- Click **Yes** in the confirmation box to process the deletion

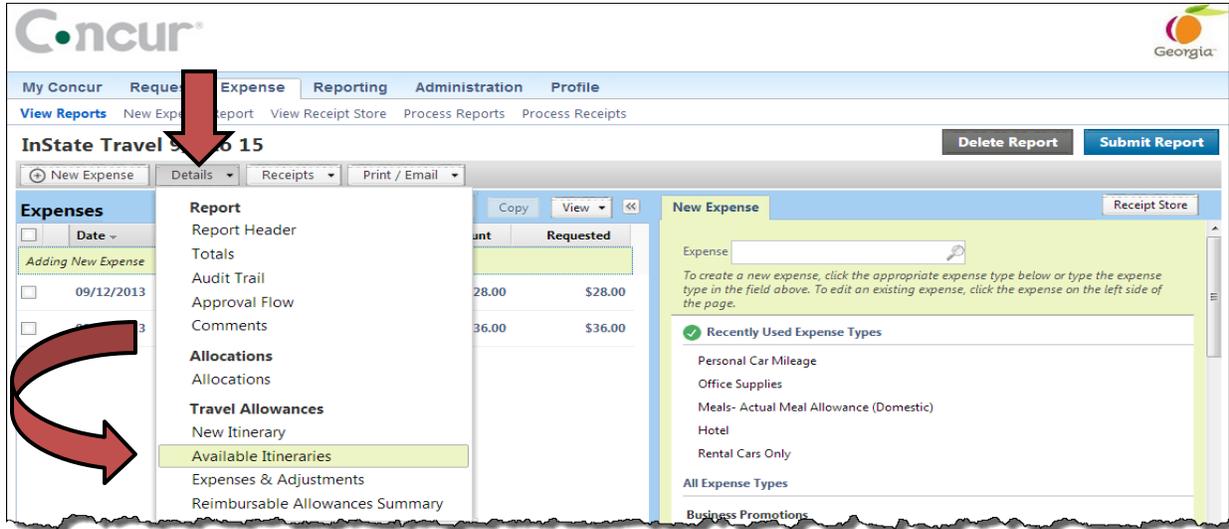


- The Travel Allowance Itinerary and the Expense will be removed from the Expense Report.

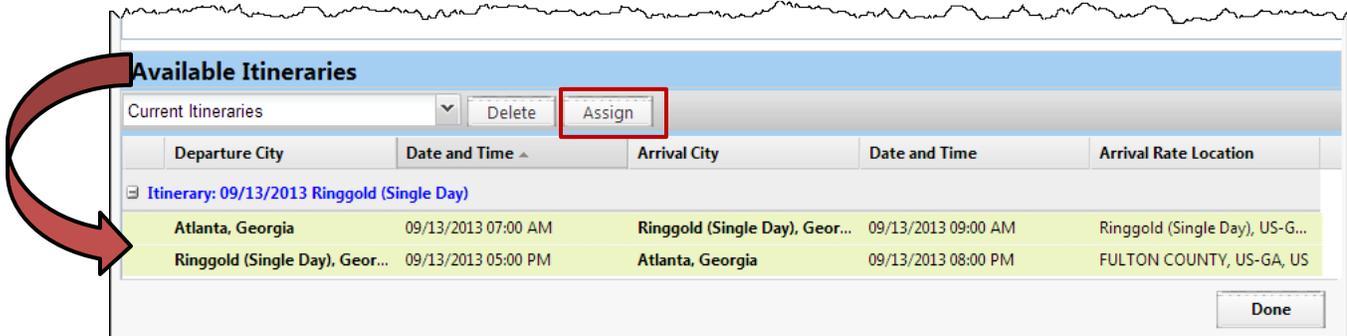
- **LINK**

- Link an Unassigned Travel Allowance Itinerary to different expense report.
 - Open the new or existing Expense Report you want to add the existing Travel Allowance Itinerary on. In our example it is an existing Expense Report.

- Click on the **Details** tab
- Click on **Available Itineraries**



- Select the itinerary you want to link from **Available Itineraries** at the bottom of the window by clicking on the Itinerary name. This will highlight the item.
- Click **Assign**



- The Travel Allowance Itinerary will move into **Assigned Itineraries** at the top of the window. Click **Next**

Travel Allowances For Report: InState Travel 9/1 to 15

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments 4 Reimbursable Allowances Summary

Assigned Itineraries

Edit Unassign

Departure City	Date and Time ^	Arrival City	Date and Time	Arrival Rate Location
Atlanta, Georgia	09/11/2013 07:00 AM	Augusta (Single Day), Geor...	09/11/2013 09:00 AM	Augusta (Single Day), US-GA...
Augusta (Single Day), Geor...	09/11/2013 06:00 PM	Atlanta, Georgia	09/11/2013 06:00 PM	FULTON COUNTY, US-GA, US
Itinerary: 09/12/2013 Moultrie (Single Day)				
Atlanta, Georgia	09/12/2013 06:00 AM	Moultrie (Single Day), Geor...	09/12/2013 09:00 AM	Moultrie (Single Day), US-GA...
Moultrie (Single Day), Geor...	09/12/2013 05:00 PM	Atlanta, Georgia	09/12/2013 08:00 PM	FULTON COUNTY, US-GA, US
Itinerary: 09/13/2013 Ringgold (Single Day)				
Atlanta, Georgia	09/13/2013 07:00 AM	Ringgold (Single Day), Geor...	09/13/2013 09:00 AM	Ringgold (Single Day), US-G...
Ringgold (Single Day), Geor...	09/13/2013 05:00 PM	Atlanta, Georgia	09/13/2013 08:00 PM	FULTON COUNTY, US-GA, US

Available Itineraries

Current Itineraries [v] Delete Assign

Departure City	Date and Time ^	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

<< Previous **Next >>**



- Adjust the Travel Allowance for any provided meals if necessary
- Click **Create Expenses** (or **Update Expenses** if it appears)

Travel Allowances For Report: InState Travel 9/1 to 15

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments 4 Reimbursable Allowances Summary

Show dates from [] to [] Go

Exclude All <input type="checkbox"/>	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/11/2013 Augusta (Single Day), Ge...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$36.00
<input type="checkbox"/>	09/12/2013 Moultrie (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00
<input type="checkbox"/>	09/13/2013 Ringgold (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00

<< Previous Next >> **Create Expenses** Cancel



- The Expense Report is updated with the Fixed Meals Expense item



My Concur Request Expense Reporting Administration Profile

View Reports New Expense Report View Receipt Store Process Reports Process Receipts

InState Travel 9/1 to 15

Delete Report

Submit Report

+ New Expense Details Receipts Print / Email

Expenses

Move Delete Copy View

New Expense

Receipt Store

Date Expense Amount Requested

Adding New Expense

<input type="checkbox"/>	09/13/2013	Fixed Meals Ringgold (Single Day), Georgia	\$28.00	\$28.00
<input type="checkbox"/>	09/12/2013	Fixed Meals Moultrie (Single Day), Georgia	\$28.00	\$28.00
<input type="checkbox"/>	09/11/2013	Fixed Meals Augusta (Single Day), Georgia	\$36.00	\$36.00

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Personal Car Mileage
- Office Supplies
- Meals- Actual Meal Allowance (Domestic)
- Hotel
- Rental Cars Only

All Expense Types

Business Promotions

Other Promotional Expense

Trade Shows

Communications

- Cellular Phone
- Internet Charges
- Local Phone

TOTAL AMOUNT	TOTAL REQUESTED
\$92.00	\$92.00

Adjust for a Provided Meal on an Existing Travel Allowance Entry

- On the My Concur page in the Expense Report or Active Work section click on an existing Expense Report to open it.
- Click on the **Details** tab.
- Select **Expenses and Adjustments** under the Travel Allowances section

The screenshot displays the Concur Expense Report interface. At the top, the Concur logo is on the left and the Georgia logo is on the right. Below the logo is a navigation bar with tabs for 'My Concur', 'Request', 'Expense', 'Reporting', and 'Profile'. Under the 'Expense' tab, there are links for 'View Reports', 'New Expense Report', 'View Receipt Store', 'Approve Reports', 'View Cash Advances', and 'New Cash Advance'. The main heading is '7/1 to 15 Travel Overnight', with 'Delete Report' and 'Submit Report' buttons to the right. Below the heading are buttons for 'New Expense', 'Details', 'Receipts', and 'Print / Email'. The 'Details' button is highlighted with a red box. A dropdown menu is open from 'Details', showing options like 'Report Header', 'Totals', 'Audit Trail', 'Approval Flow', 'Comments', 'Cash Advances', 'Allocations', 'Travel Allowances', 'New Itinerary', 'Available Itineraries', 'Expenses & Adjustments', and 'Reimbursable Allowances Summary'. The 'Expenses & Adjustments' option is highlighted with a red box and a red arrow points to it. The main content area shows a table with columns for 'Amount' and 'Requested', and a 'New Expense' section with a search bar and a list of expense types. The table shows three rows of expenses, each with an amount of \$27.00 and a requested amount of \$27.00. The total requested amount is \$81.00.

Amount	Requested
\$27.00	\$27.00
\$27.00	\$27.00
\$27.00	\$27.00

TOTAL REQUESTED \$81.00

- The **Expenses & Adjustments** window opens.
- Select or deselect any necessary meals.

Travel Allowances For Report: InState Travel 9/1 to 15

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments 4 Reimbursable Allowances Summary

Show dates from to Go

Exclude All <input type="checkbox"/>	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/11/2013 Augusta (Single Day), Ge...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$36.00
<input type="checkbox"/>	09/12/2013 Moultrie (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00
<input type="checkbox"/>	09/13/2013 Ringgold (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00

<< Previous Next >> **Create Expenses** Cancel

- Click **Create Expenses** or **Update Expenses**
- The Expense Report will open and the additions, changes or deletions will be made.