



How to Correct an Existing Travel Allowance Itinerary

Sometimes the easiest way to fix a problem with a Travel Allowance is to delete it and re-enter it. However you also have the option to Edit or Unassign a Travel Allowance Itinerary from an Expense Report in order to Delete or Assign it to a different Expense Report.

EDIT

- To edit an existing Travel Allowance Itinerary item:
 - Select the entry in **Assigned Itineraries**
 - Click on **Edit**.

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 07:00 PM	FULTON COUNTY, US-GA, US

- The Standard Itinerary from opens. Travel Allowances for Travel With and Without an Overnight Stay are edited on the Standard Itinerary.

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 type="checkbox"/>	Ringgold (Single Day), G... 09/13/2013 05:00 PM	Atlanta, Georgia 09/13/2013 07:00 PM	FULTON COUNTY, US-GA...

New Itinerary Stop

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

Save

Go to Single Day Itineraries Next >> Cancel

- Click on the checkbox next to leg of a trip to open it for editing
 - If a leg is missing enter the information in New Itinerary Stop.
 - When editing for a single day trip, you must 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**.

- Make certain the new or edited Itinerary item is correct
 - If it is not, click on **Previous** at the bottom of the window to return to the previous step.

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

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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 [v] Delete Assign

	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 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), 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

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

- The Expense Report will automatically make any adjustments to the affected **Fixed Meals** expense entry.

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
<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	\$36.00	\$36.00
			TOTAL AMOUNT	TOTAL REQUESTED
			\$92.00	\$92.00

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

-
- Trade Shows

Communications

- Cellular Phone
- Internet Charges
- Local Phone

UNASSIGN

- To detach a Travel Allowance Itinerary from an open Expense Report to allow deletion or to assign it to another Expense Report:
 - 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 the Travel Allowances section

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

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

- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments
- Allocations
- Allocations
- Travel Allowances
- New Itinerary
- Available Itineraries
- Expenses & Adjustments
- Reimbursable Allowances Summary

Amount Requested

28.00	\$28.00
28.00	\$28.00
16.00	\$16.00

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 at least 2 lines. 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

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 detaches from the open Expense Report and moves to **Available Itineraries**

Available Itineraries				
Current Itineraries		Delete	Assign	
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

- The Travel Allowance Itinerary is now available to be deleted or assigned to another Expense Report.

IMPORTANT NOTES: Whether a Travel Itinerary is in **Assigned** or **Available Itineraries** the TTE system will not allow entry of a new Travel Allowance Itinerary with the same or overlapping dates. You must DELETE the Travel Allowance Itinerary in order to make a new entry with that date.

The TTE system tracks dates with existing Travel Allowance Itineraries across all processed and unprocessed Expense Reports.

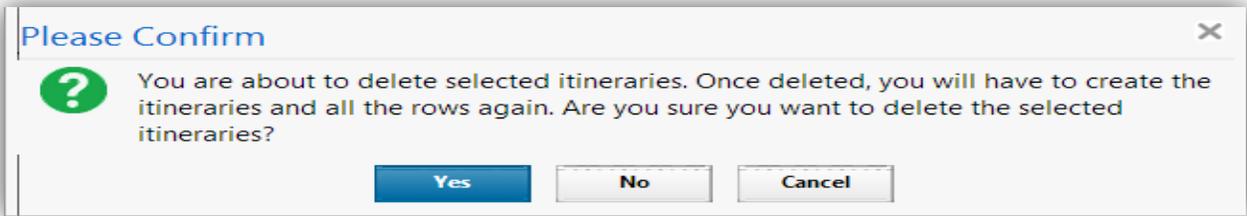
Travel Allowance Itineraries appearing in **Available Itineraries** with a lock icon indicates it is attached to an Expenses Report and cannot be transferred or deleted.

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**.

Available Itineraries				
Current Itineraries		Delete	Assign	
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

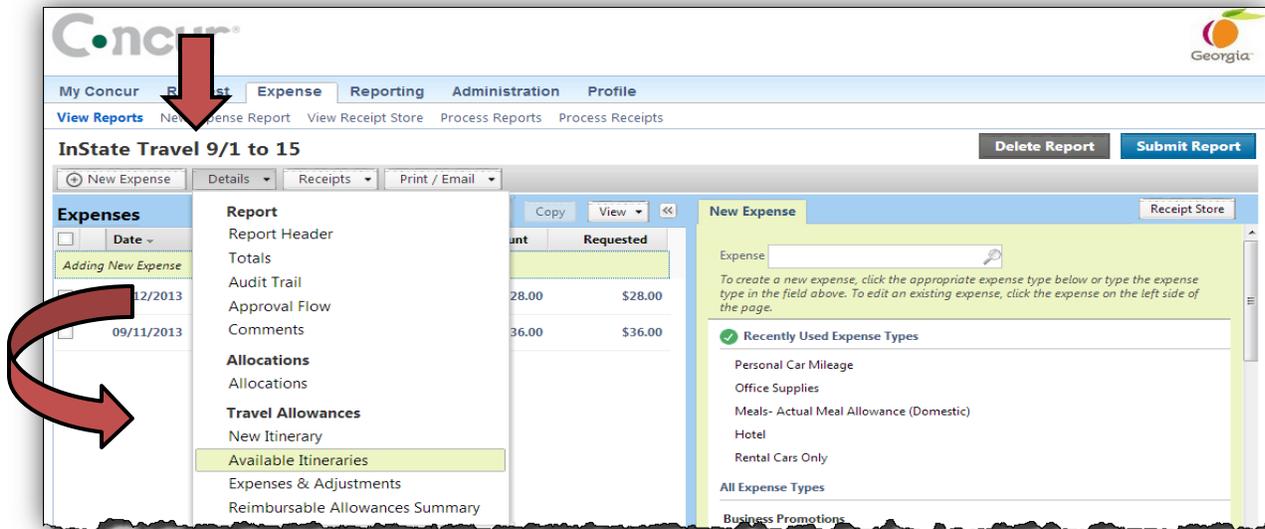
- Click **Yes** in the confirmation box to process the deletion



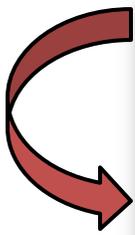
- The Travel Allowance Itinerary and the Expense Item will be removed from the Expense Report.

ASSIGN

- To Assign an Unassigned Travel Allowance Itinerary to different Expense Report.
 - Open a new or existing Expense Report to assign the existing Travel Allowance Itinerary to. In our example it is an existing Expense Report.
 - Click on the **Details** tab
 - Click on **Available Itineraries**



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



Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
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

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

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Assigned Itineraries

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

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**.

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 Fixed Meals expense item on the Expense Report will be automatically updated.



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

<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

Expense

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Recently Used Expense Types

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- Office Supplies
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- 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