

## Managing Itineraries for Concur Expense Reports

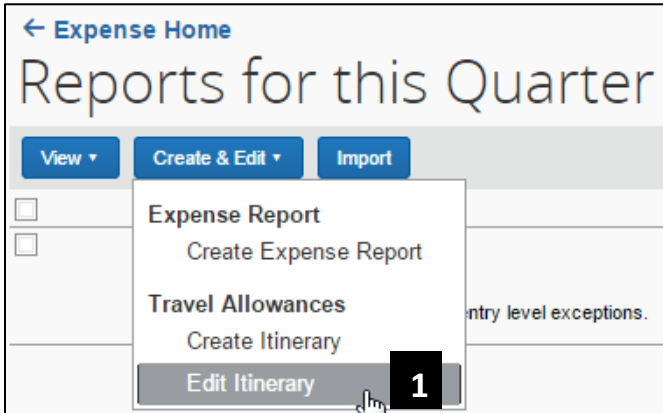
### Description

This job aid describes how to edit a trip itinerary after it has already been recorded in Concur when the expense report was created.

### Navigation

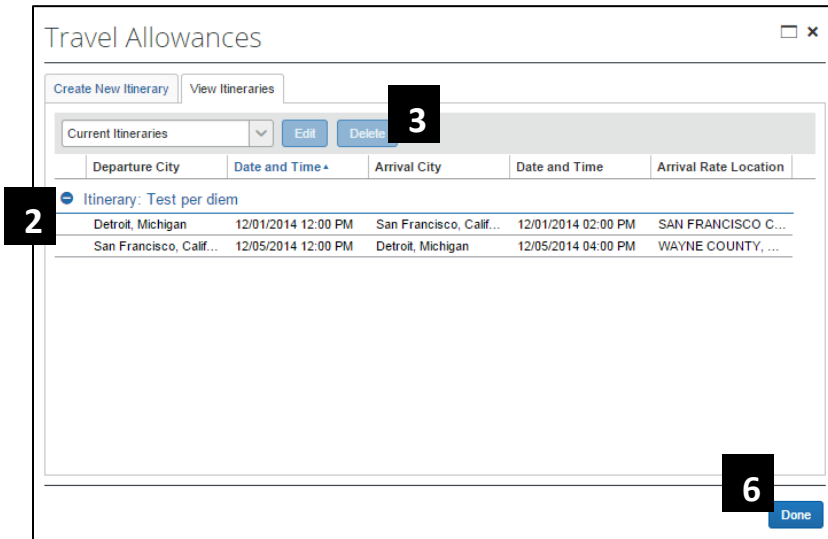
Concur Home > Expense > Report Library>Create & Edit > Edit Itinerary

*\*NOTE: You do not have to be in an expense report to edit the itinerary.\**

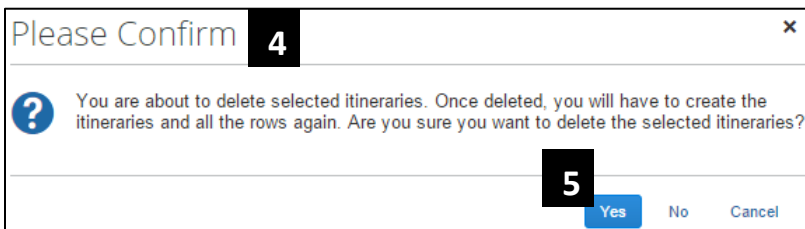


1. Select **Edit Itinerary** from the **Create & Edit** drop-down menu.

Please follow steps 3 - 5 to **delete an itinerary**:

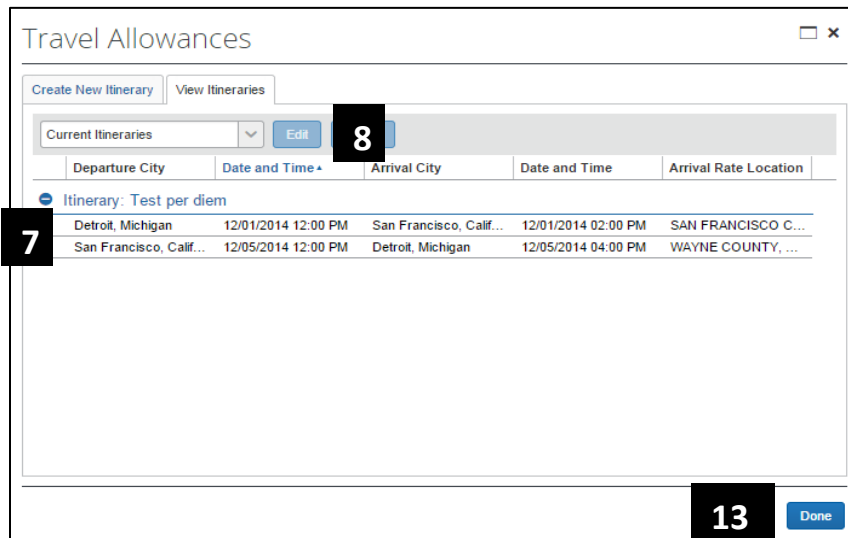


2. Click on the **Itinerary Name** for the itinerary you wish to delete.
3. Click **Delete**
4. Review the **Please Confirm** information.
5. Click **Yes**
6. Click **Done** to close the **View Itineraries** pane.



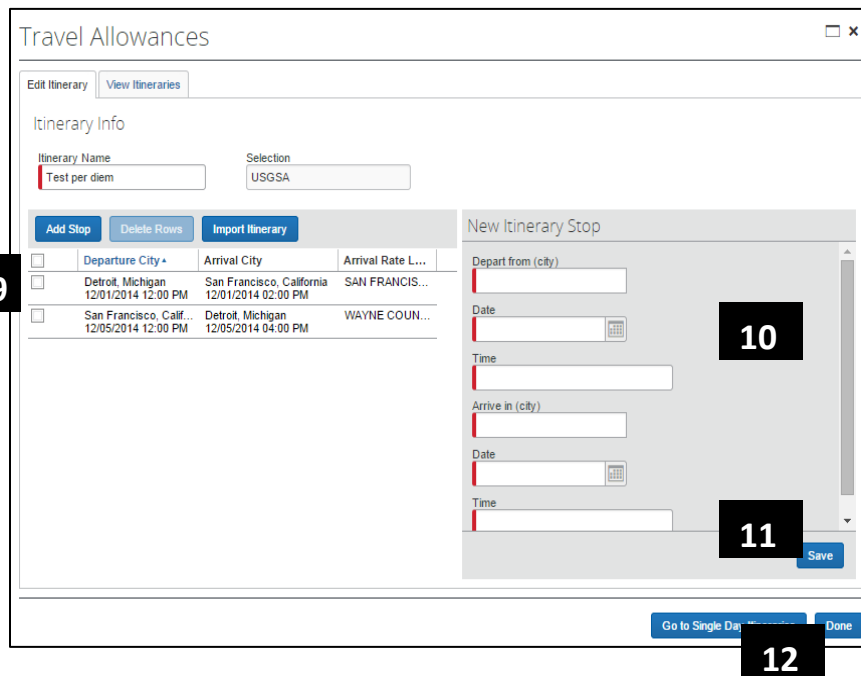
**Note:** If you delete an itinerary currently assigned to an expense report that is not submitted or has been sent back for corrections, all fixed meal expense lines will be deleted from the expense report.

Please follow steps 7 - 13 to **edit an itinerary**:



7. Click on the **Itinerary Name** for the itinerary you wish to edit.

8. Click



9. Click the box on the left side of the leg you need to modify.

10. Modify the appropriate **Departure** or **Arrival** data in the **Edit Itinerary Stop** pane.

11. Click

Repeat Steps 9 - 11 to modify each additional leg.

12. Click  to return to the **View Itineraries** pane.

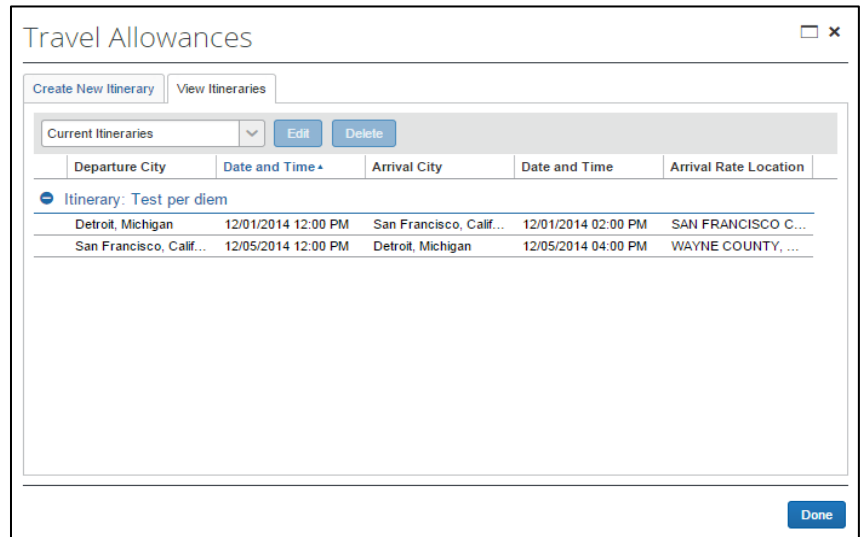
13. Click  to close the **View Itineraries** pane (above).


**Note: Adding Itinerary Stops** - If needed, you are also able to add an Itinerary Stop by clicking  and filling out the fields in the **New Itinerary Stop** pane. Click  when finished.

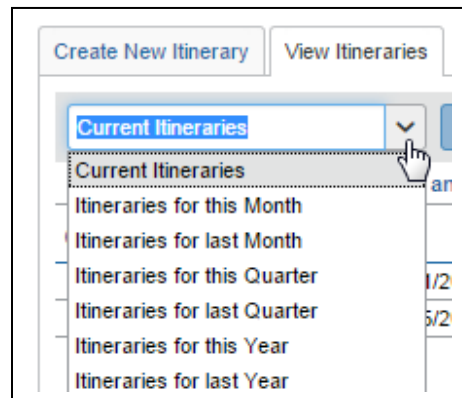



## Troubleshooting Tips

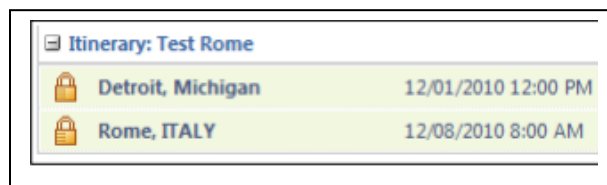
1. If you are unable to locate the itinerary you wish to delete or edit in the **View Itineraries** pane, you may need to alter your search parameters.



Click  next to the **Current Itineraries** field to display available itinerary search options. Select an option to view your itineraries that meet your criteria.



2. Itineraries with a  next to the legs of the trip cannot be deleted or edited. These itineraries have been assigned to expense reports that have been submitted and/or approved.



3. To edit an itinerary assigned to an expense report:  
Navigation: *Open the report > Details > Available Itineraries > Assigned Itineraries > Edit.*

The screenshot shows a software interface titled "Test". At the top, there are buttons for "+ New Expense" and "+ Quick Expenses", followed by "Import", "Details", "Receipts", and "Print / Email". Below this is a table for "Exceptions" with columns for Expense, Date, Amount, and Exception. The table contains two rows of data. Below the exceptions table is a section for "Expenses" with a table for "Adding New Expense" containing two rows of data. A dropdown menu is open on the right side of the interface, listing various options under categories like "Report", "Cash Advances", "Allocations", and "Travel Allowances". The "Available Itineraries" option is highlighted with a mouse cursor.

| Expense           | Date       | Amount   | Exception |
|-------------------|------------|----------|-----------|
| Hosting/Busine... | 11/11/2014 | \$120.00 | SPG: Ex   |
| Hosting/Busine... | 11/11/2014 | \$120.00 | ACTION    |

| Date       | Expense   |
|------------|---|
| 01/12/2015 | Travel Ground Transportation, New Delhi, INDIA          |
| 11/11/2014 | Hosting/Business Meals (Breakfast), Ann Arbor, Michigan |

- Report
  - Report Header
  - Totals
  - Audit Trail
  - Approval Flow
  - Comments
- Cash Advances
  - Available
  - Assigned
- Allocations
  - Allocations
- Travel Allowances
  - New Itinerary
  - Available Itineraries
  - Expenses & Adjustments