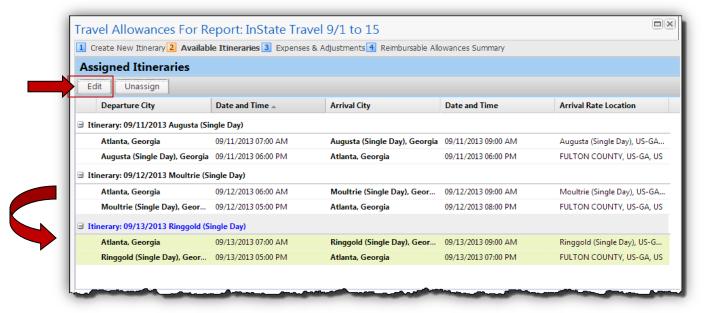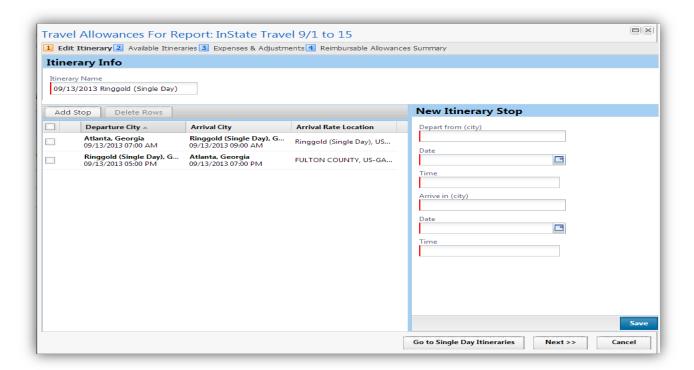# How to Correct an Existing Travel Allowance Itinerary

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.
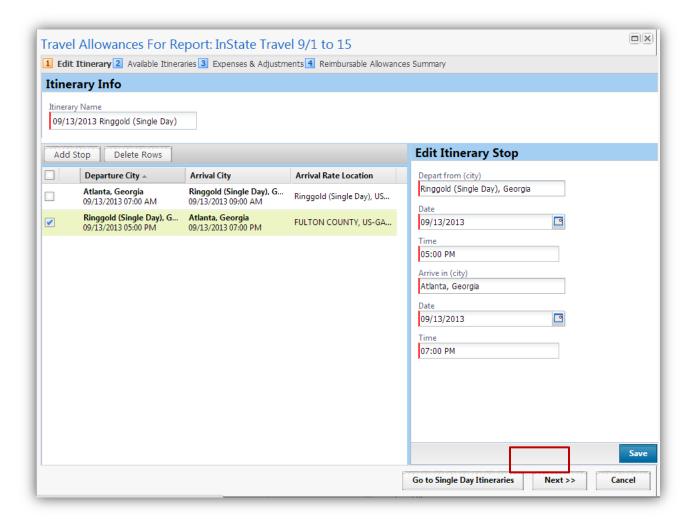
EDIT

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

- 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)

	Departure City ▲	Arrival City	Arrival Rate Location
☐	Atlanta, Georgia 09/13/2013 07:00 AM	Ringgold (Single Day), G... 09/13/2013 09:00 AM	Ringgold (Single Day), US...
☐	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
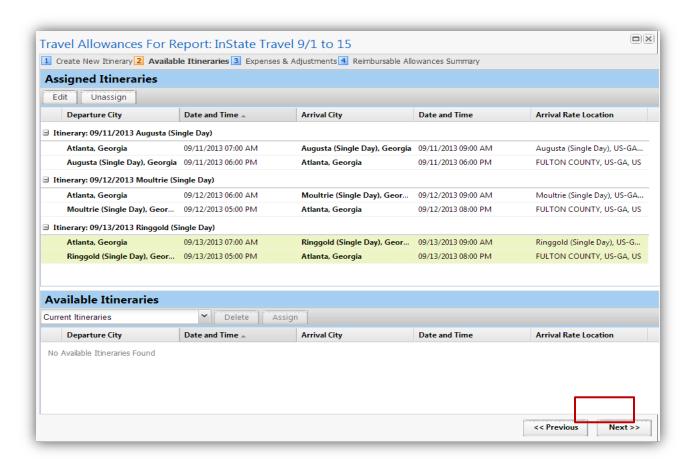
Save

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.
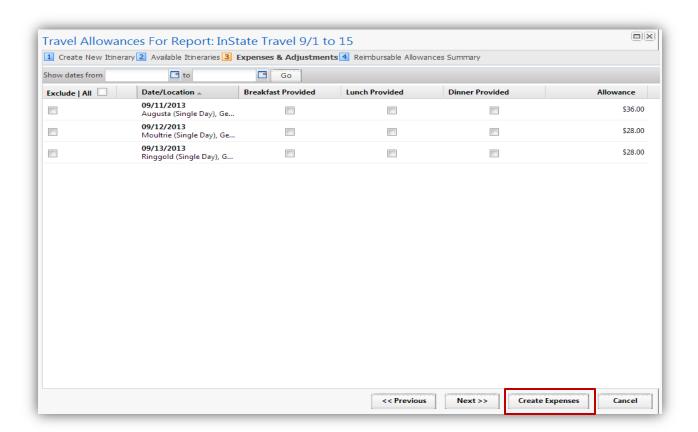- The data for the item you checked will appear in **Edit Itinerary Stop**.

- Correct the field that is in error.
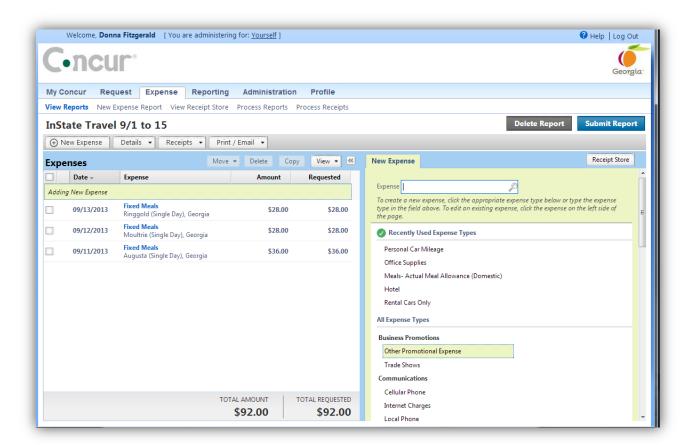- Click **Save**
- Click **Next**.

- 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

| 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 ▼] [Delete] [Assign]

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

No Available Itineraries Found

[<< Previous] [Next >>]

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

The table shown in the image contains:

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 ☐	Date/Location ▲	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
☐	09/11/2013 Augusta (Single Day), Ge...	☐	☐	☐	$36.00
☐	09/12/2013 Moultrie (Single Day), Ge...	☐	☐	☐	$28.00
☐	09/13/2013 Ringgold (Single Day), G...	☐	☐	☐	$28.00

[<< Previous] [Next >>] [Create Expenses] [Cancel]

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

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
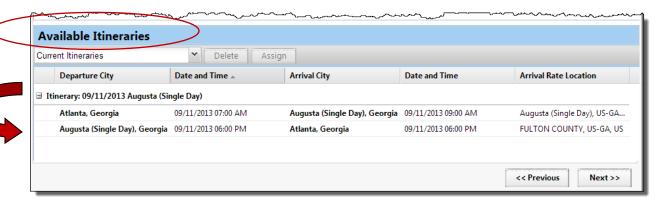 - Select *Available Itineraries* from the Travel Allowances section

- Locate the Travel Allowance Entry in the ***Assigned Itineraries*** section

    NOTE: If entered properly each Itinerary has <u>at least 2</u> 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**

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

- 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 <u>all</u> processed and unprocessed Expense Reports.
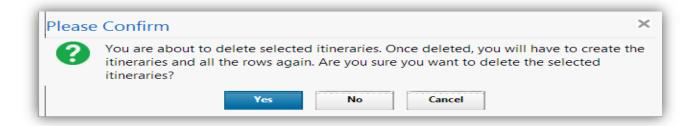
Travel Allowance Itineraries appearing in *Available Itineraries* with a lock icon indicates it is attached to an Expenses Report and cannot be transferred or deleted.

DELETE

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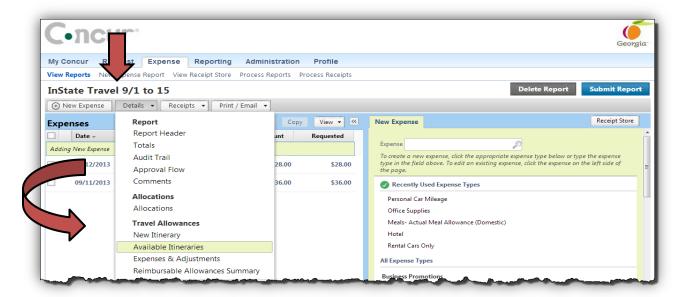 - Click **Delete**.

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

Please Confirm

You are about to delete selected itineraries. Once deleted, you will have to create the itineraries and all the rows again. Are you sure you want to delete the selected itineraries?

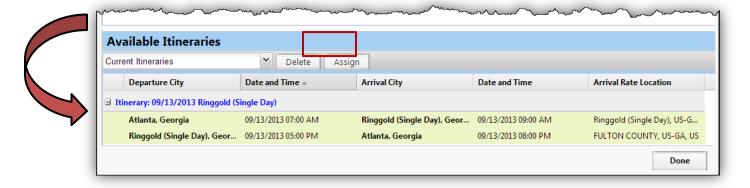**Yes**   **No**   **Cancel**

- The Travel Allowance Itinerary <u>and</u> the Expense Item will be removed from the Expense Report.
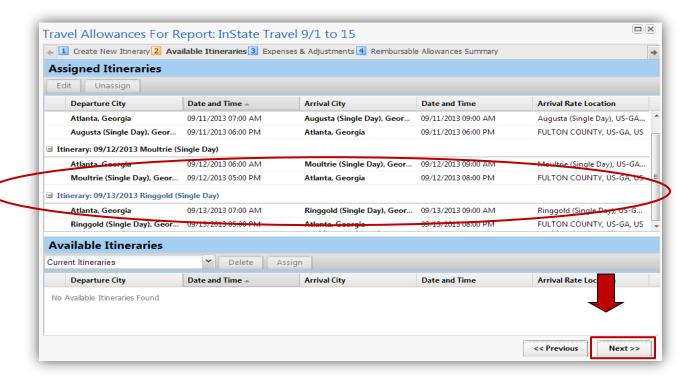
ASSIGN

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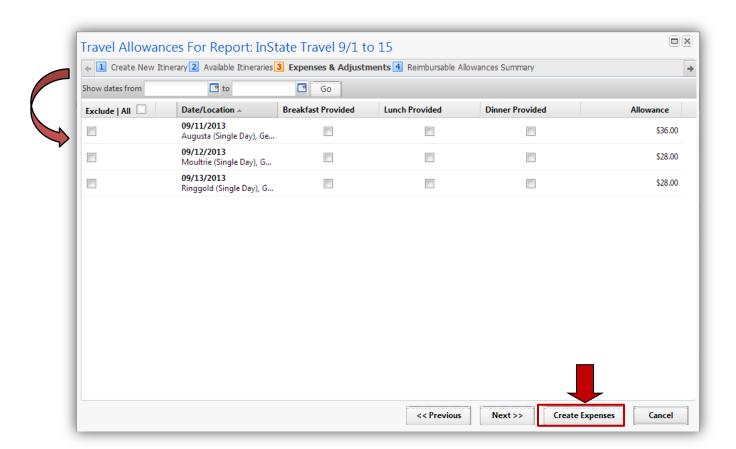 - Click on the **Details** tab
  - Click on *Available Itineraries*

- 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**

- The Travel Allowance Itinerary will move into *Assigned Itineraries* at the top of the window.
- Click **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 ☐	Date/Location ▲	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
☐	**09/11/2013** Augusta (Single Day), Ge...	☐	☐	☐	$36.00
☐	**09/12/2013** Moultrie (Single Day), G...	☐	☐	☐	$28.00
☐	**09/13/2013** Ringgold (Single Day), G...	☐	☐	☐	$28.00

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

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

TeamWorks Travel & Expense System Version Date:04/04/14
Atlanta, Georgia 30334