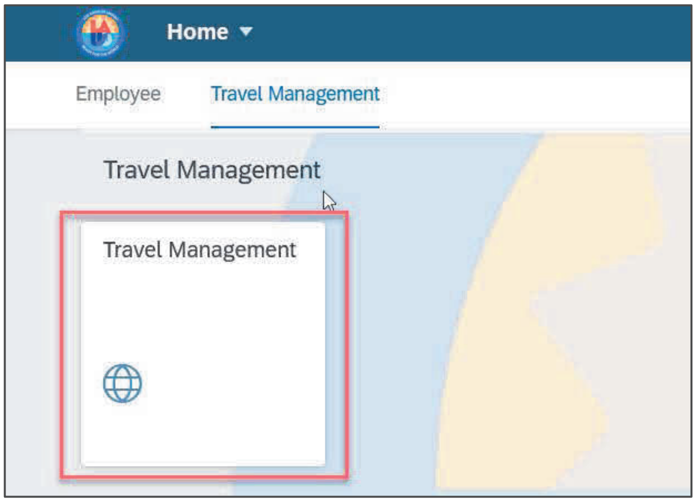
SUBMITTING A TRAVEL REQUEST ON BEHALF OF AN EMPLOYEE

This job aid is to provide step-by-step instructions for creating and submitting a travel request on behalf of another employee in Concur

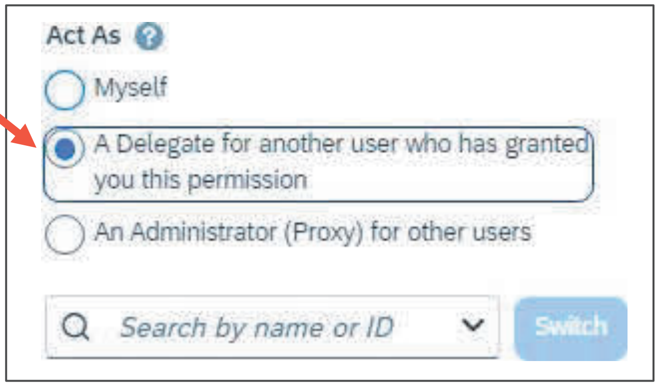
Per LAUSD policy, travel requests should be submitted at least 20 business days prior to the event for local and in-state travel, and at least 30 business days prior to the event for out-of-state and international travel.

1. Log in to ESS (https://ess.lausd.net) with your SSO and click on “Travel Management” tile. The Concur website will open.



2. In Concur, click on your name initial located on the top right corner.

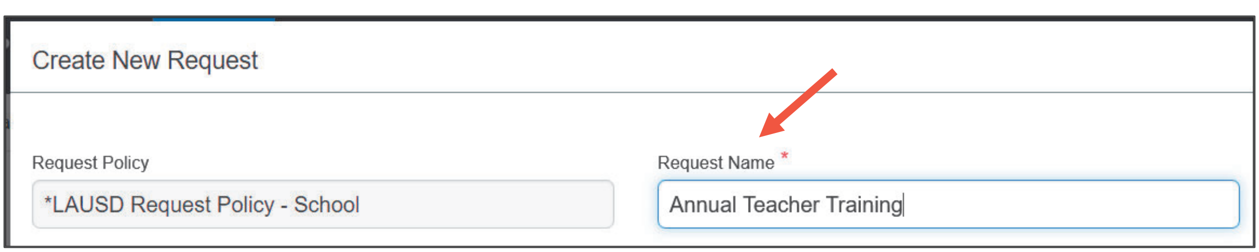
3. Click on “A Delegate for another user” and search by name or click on the drop-down menu to choose the name of the employee you are entering on behalf of. Then click “Switch”.
*If the name of the employee you are trying to create the trip for does not show up, ask the employee to follow How to Assign a Delegate. If the employee does not have access to Concur, contact the Travel Unit.



4. You should see the status “Acting as (traveler’s name)”.

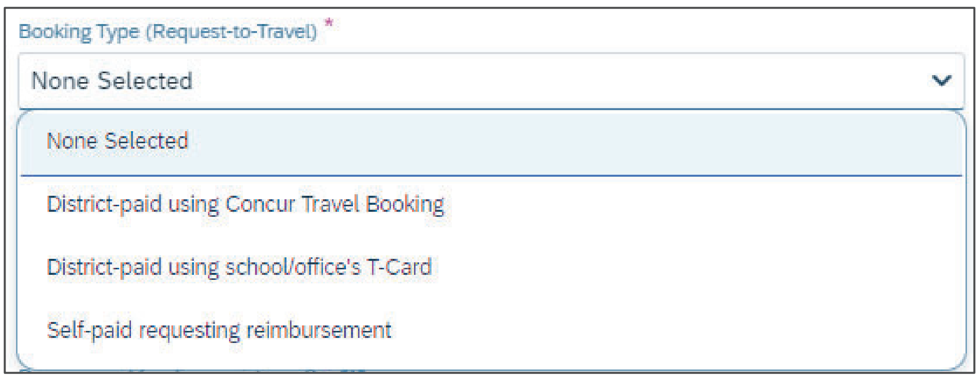
5. Select “Start a Request.”

6. “Create New Request” screen will display. Enter the name of the conference or event name as shown on the flyer under “Request Name”. (Ex: CABE, Spring CUE, AVID, Legislative Policy Meeting)
All fields marked with an * requires an entry. The greyed-out field cannot be modified

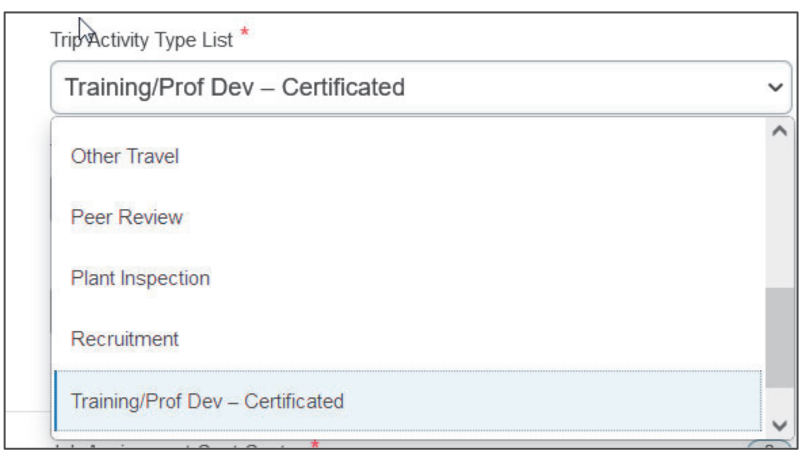


7. Select the Booking Type.
District-paid using Concur Travel Booking: Using the District's virtual card and book through Concur Booking tool
District-paid using school/office's T-Card: Using the T-Card and book through a third-party agency (Expedia, booking.com)
Self-paid requesting reimbursement: Employee book their own travel expenses outside of the Concur Booking tool

If you are self-paying for one expense and using the T-Card for another, choose "District-paid using school/office's T-Card"



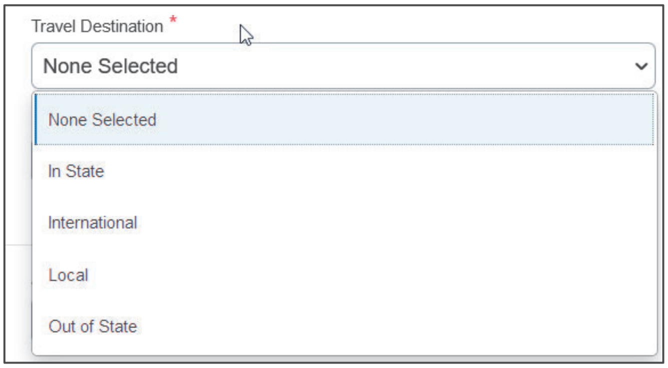
8. Select the appropriate trip activity from the "Trip Activity Type List" drop-down selection options.



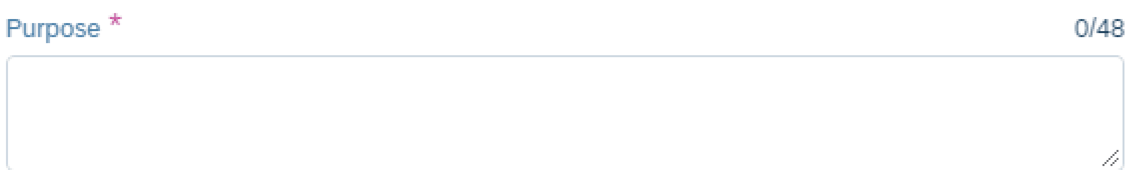
9. Enter "Start Date" and "End Date." Start Day is the day employee is leaving and End Date is the day the employee is returning.

10. For “Travel Destination,” select whether the trip is Local, In State, Out of State, or International.

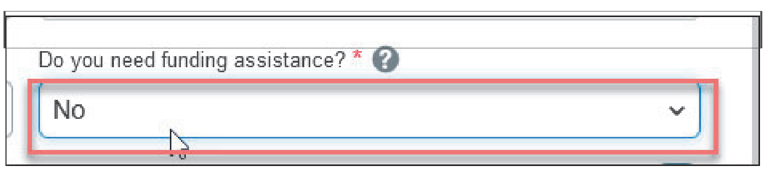
If the conference location is <u>less than 45 miles</u>, the travel destination is LOCAL



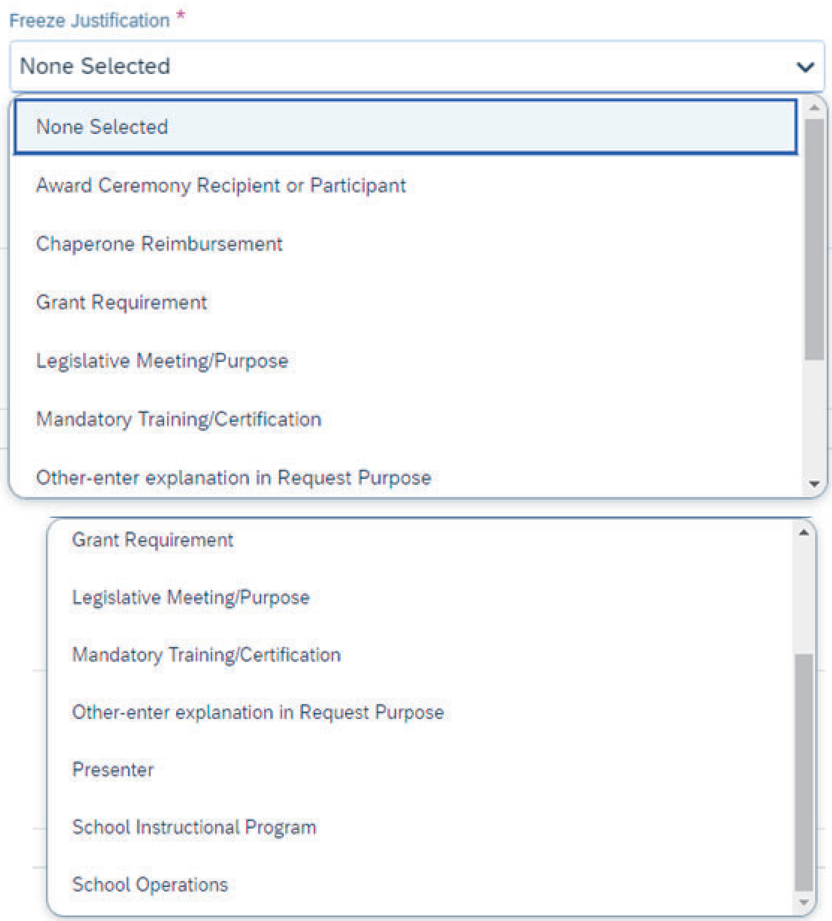
11. Provide a ‘Purpose’ for the travel request. Do not list the Conference name again, enter the reason **why** the traveler is attending the conference/event. Also, if 'Other' is chosen in the Freeze drop-down, enter the brief justification for requesting a Freeze exception.



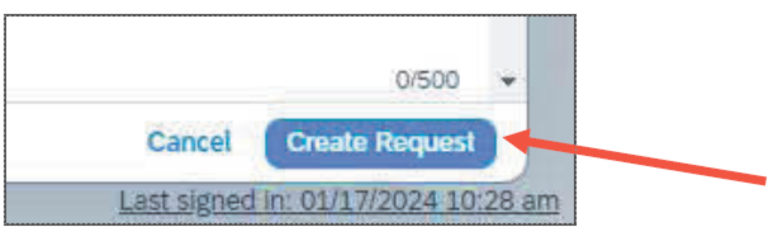
12. Choose NO to the question “Do you need funding assistance?" You are required to provide the funding allocation because you are the acting as a delegate.



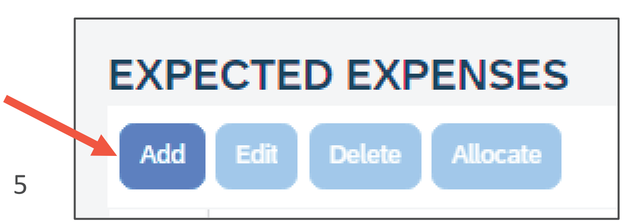
13. Choose the Freeze Justification from the drop down menu. If 'Other' is chosen, a brief justification MUST be provided in the 'Purpose' field:



14. When you completed filling out the page, click on "Create Request".

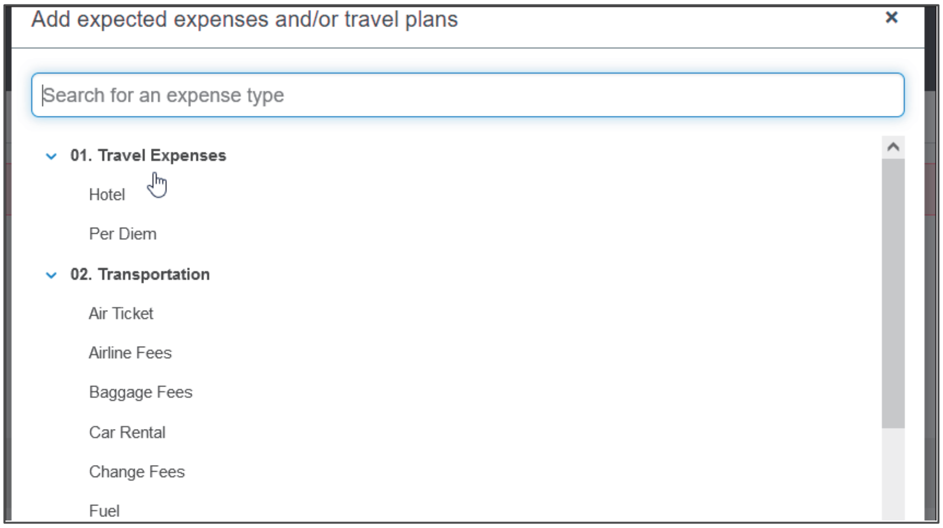


15. Click on "Add" to start inputting your travel expenses. Hotel, airfare, per diem, conference fee, etc.
** If it is a no-cost ($0) trip, add the conference fee and enter the total amount of $0. Allocation of the funding is still required (after adding the conference expense, skip to # 17)

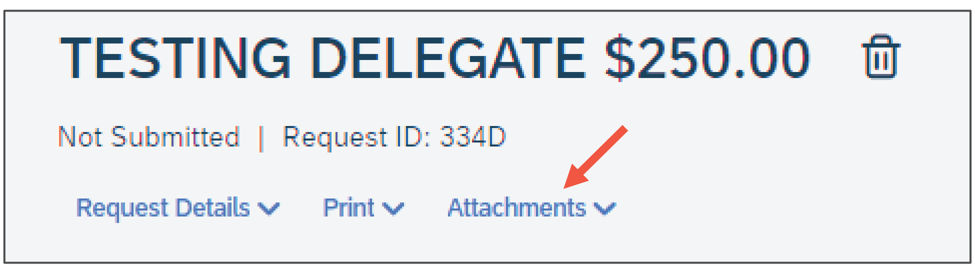


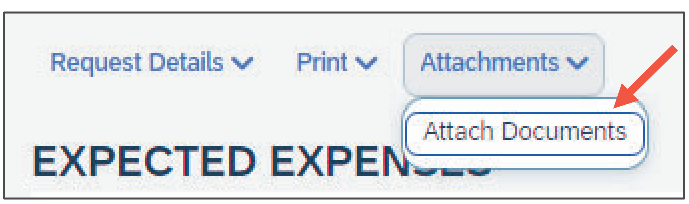
16. Select the expense types that are appropriate for your trip and for each expense type screen, enter the required information, and click on Save.

All fields marked with an * requires an entry

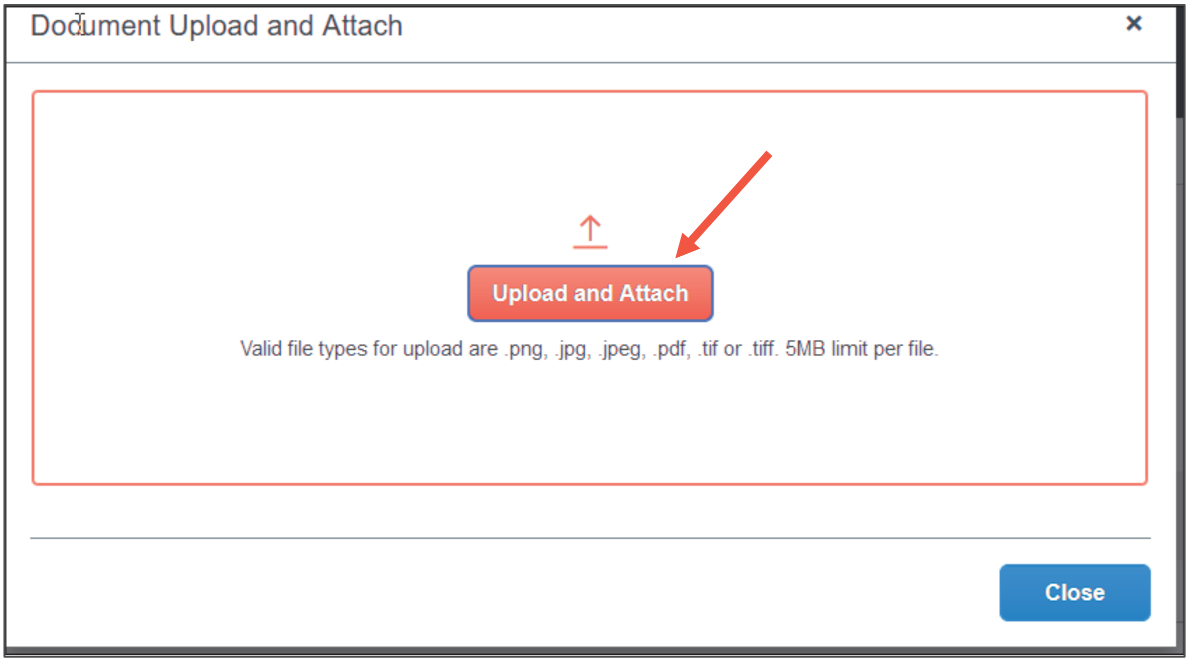


17. Once you've completed adding all estimated expenses for the trip, click on "Attachments" → "Attach Documents" to add the required supporting documentation, such as a conference agenda or quotes for estimated airfare or hotel expenses.

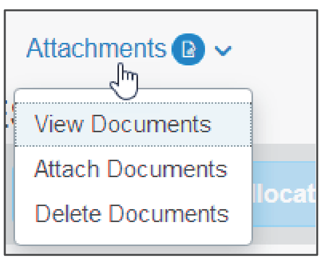




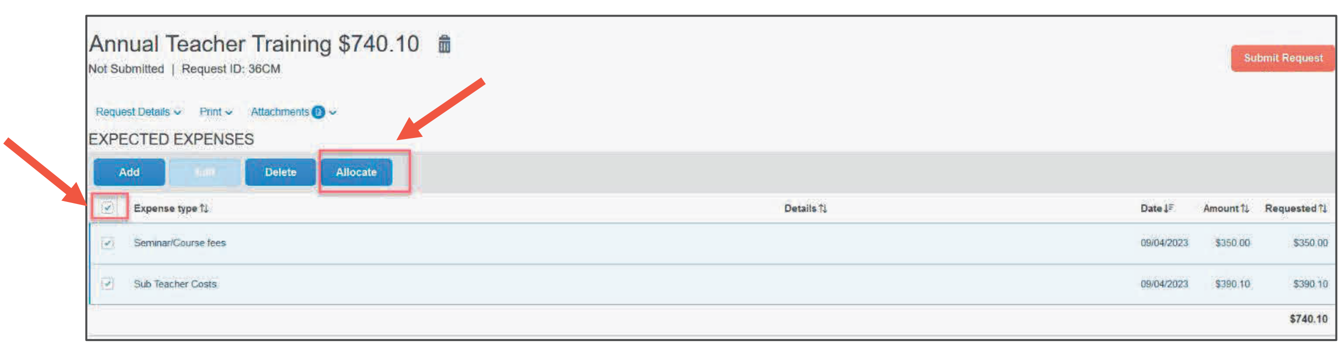
18. You can drag the files into the box or click on “Upload and Attach” to upload supporting documents.



19. Once an attachment has been uploaded, you should see the options to view, attach, or delete documents.

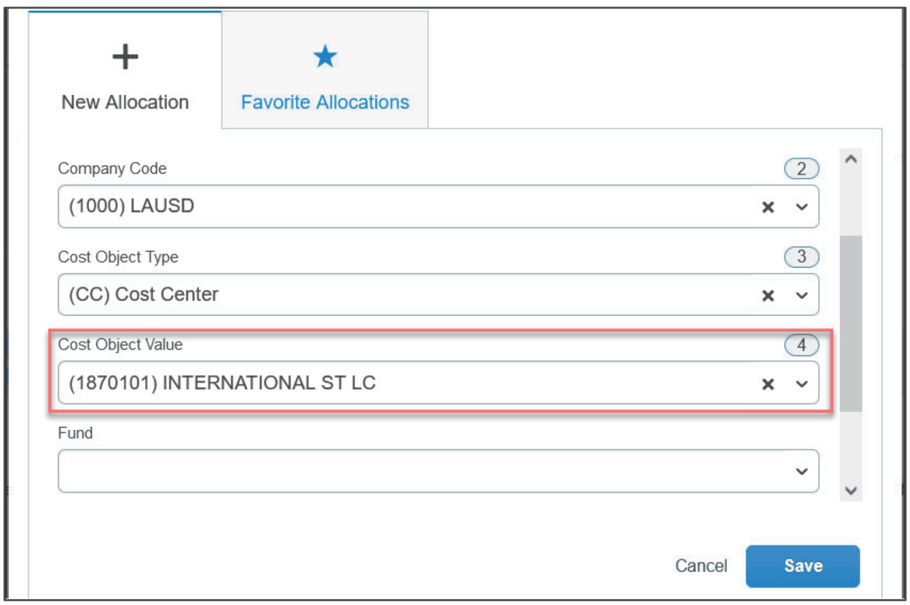


20. Enter the expense budget line (funding allocation). Put a checkmark to highlight the expenses and click “Allocate.”

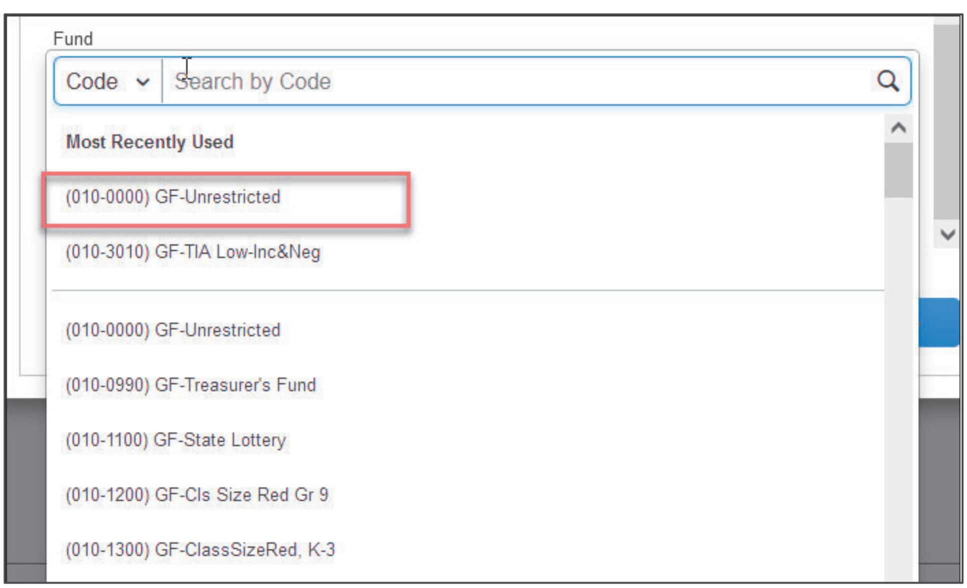


21. Click “Add.”

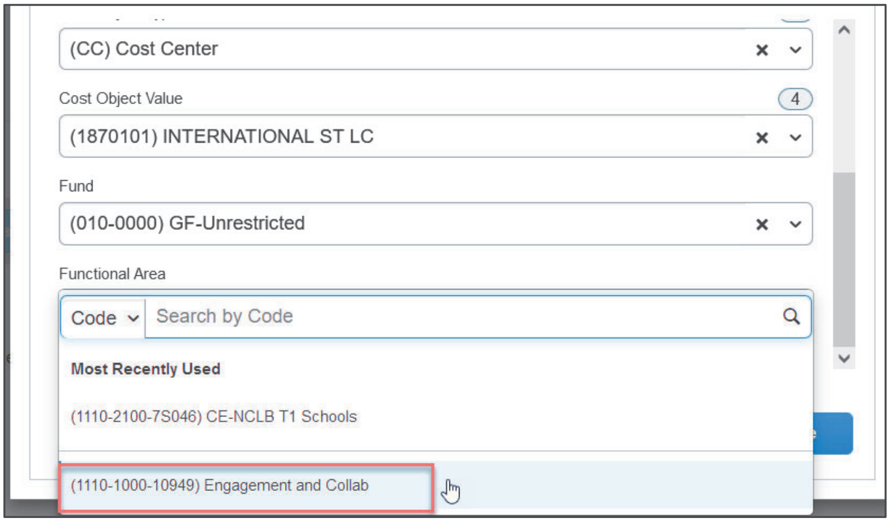
22. By default, the “Cost Object Value” is set to your home cost center. If the funding is being provided by a different cost center, change this value.



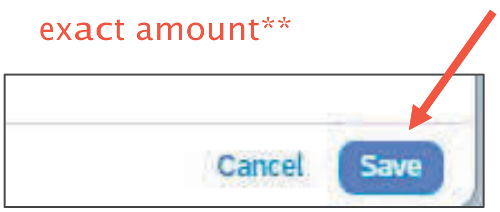
23. Enter the FUND or search by Code or Text to look for and select the appropriate Fund value. Click on the appropriate fund.



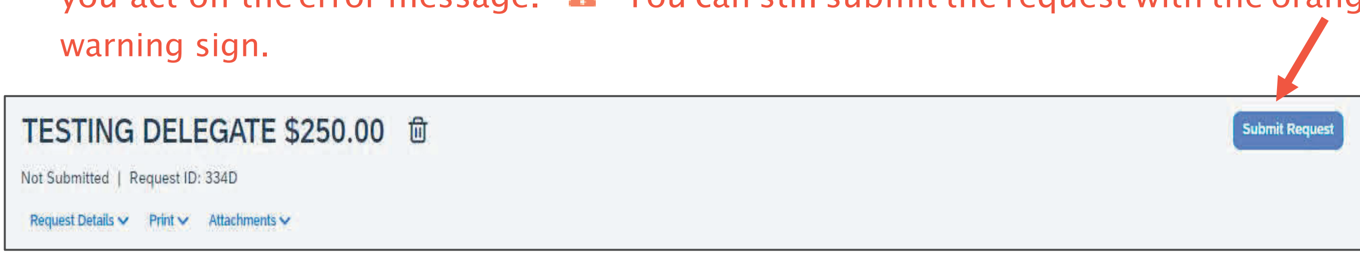
24. Enter the FUNCTIONAL AREA or search by Code or Text to look for and select the appropriate Functional Area value.

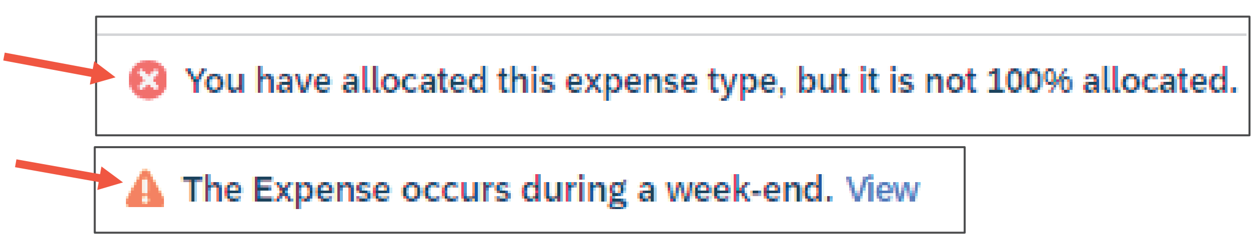


25. Click “Save” when done. Then click “Save” again.
You can split funding by Percent or Dollar Amount if necessary. To add another expense budget line, click “Add” (step 18). You can allocate in percentages or an exact amount

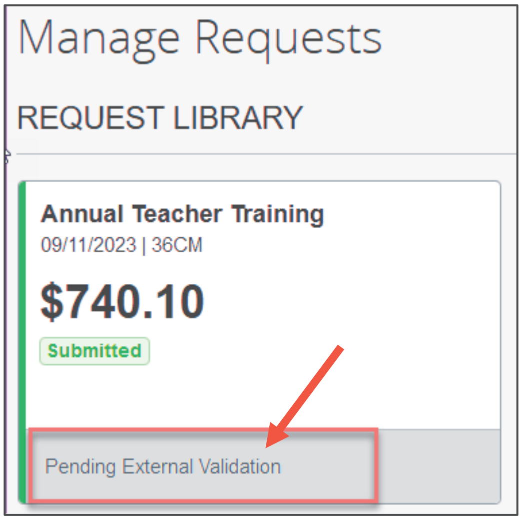


26. Click on “Submit Request” to submit the request.
**If you have a red warning sign, you will not be able to submit the request until you act on the error message. You can still submit the request with the orange warning sign.

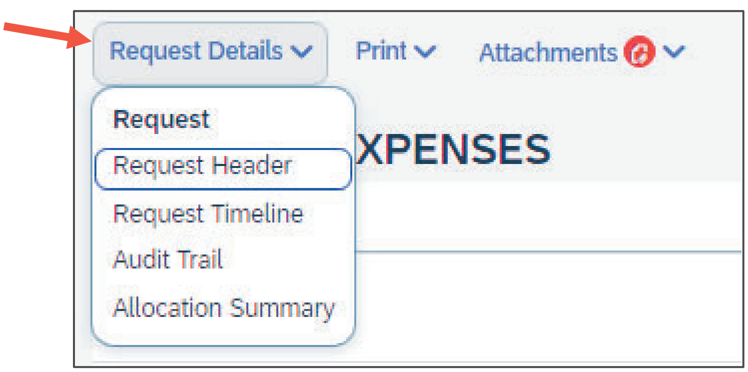




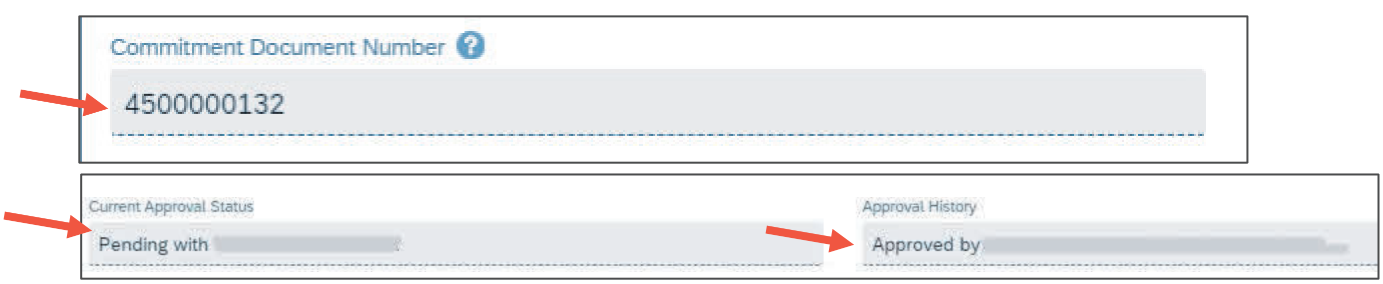
27. Once the request is submitted, the tile for the Travel Request will show "Pending External Validation". If budget check is successful, the request will route to the appropriate approvers. If budget check fails then the request will return with an error message.



28. To check if the request successfully passed through budget check, click on the trip tile and click on "Request Details" → "Request Header".



29. If a Commitment Document Number is displayed, the budget check was successful. You will also see the name of the approver the request is pending with. **You can always come back to the request header to check your request status.**



30. If you chose to use the Concur Booking Tool to book your travel expenses, you will see the “Book Travel” button <u>when the request is approved</u>. Refer to the job aid “How to Book Travel in Concur” if you need further assistance.