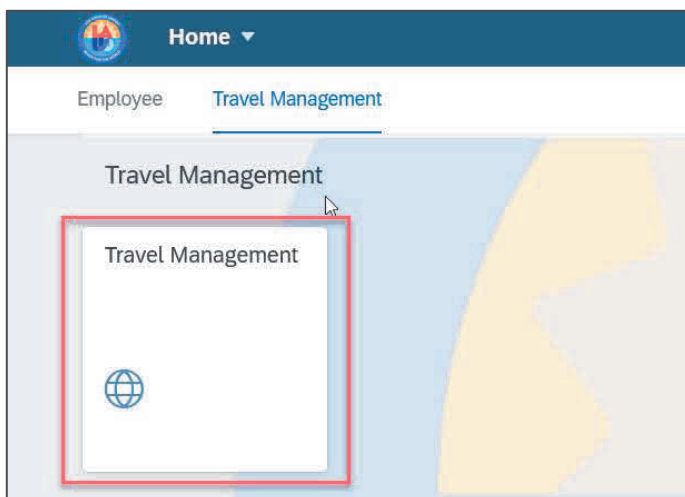


SUBMITTING A TRAVEL REQUEST ON BEHALF OF AN EMPLOYEE

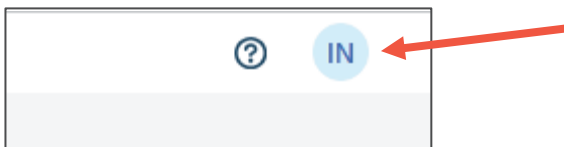
This job aid is to provide step-by-step instructions for creating and submitting a travel request on behalf of another employee in Concur

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.



- 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.



Act As ?

☐ Myself

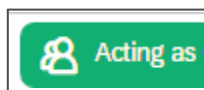
☒ A Delegate for another user who has granted you this permission

☐ An Administrator (Proxy) for other users

Search by name or ID

Switch

- You should see the status “Acting as (traveler's name)”.

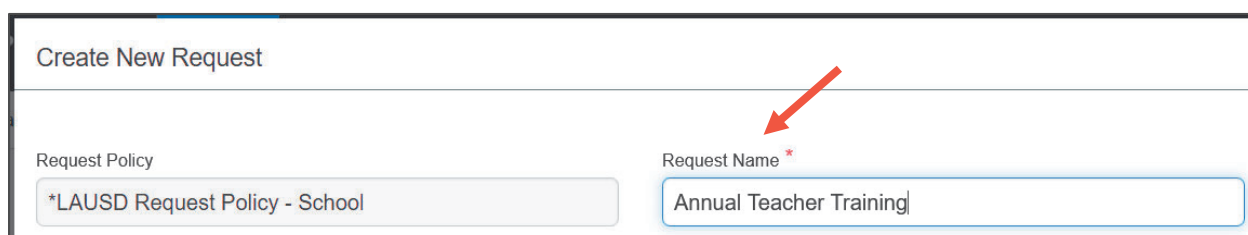


- Select “Start a Request.”



- “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****



Create New Request

Request Policy

*LAUSD Request Policy - School

Request Name *

Annual Teacher Training

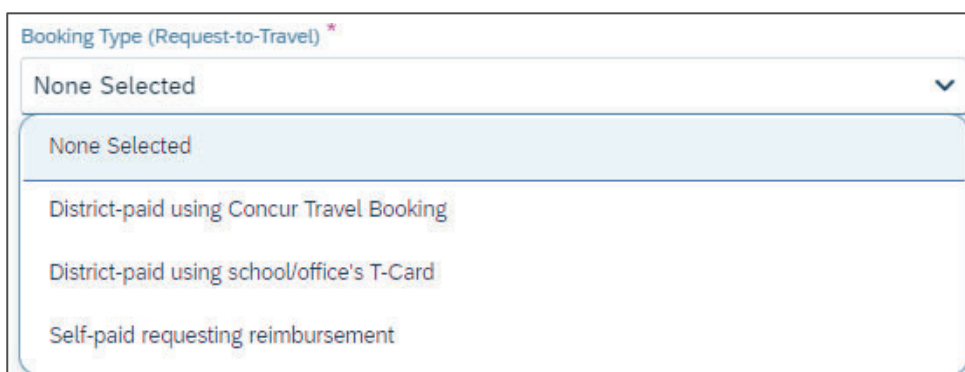
7. Select the Booking Type.

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)

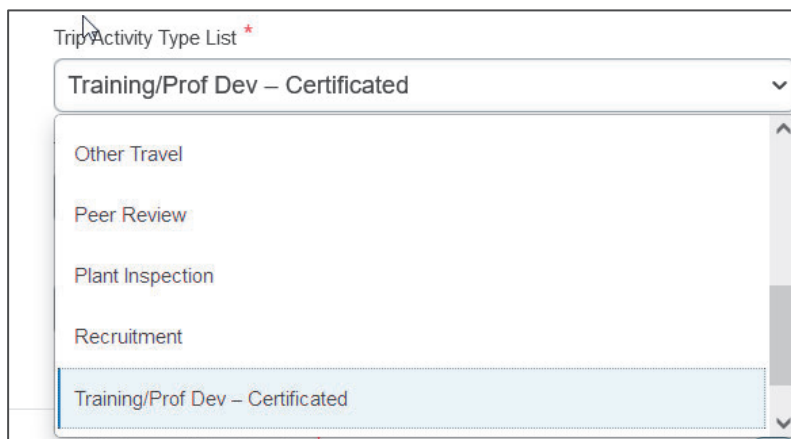
Self-paid requesting reimbursement: Employee book their own travel expenses outside of the Concur Booking tool

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



The screenshot shows a dropdown menu titled "Booking Type (Request-to-Travel) *". The menu is open, displaying four options: "None Selected" (highlighted), "District-paid using Concur Travel Booking", "District-paid using school/office's T-Card", and "Self-paid requesting reimbursement".

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



The screenshot shows a dropdown menu titled "Trip Activity Type List *". The menu is open, displaying a list of activities: "Training/Prof Dev – Certificated" (highlighted), "Other Travel", "Peer Review", "Plant Inspection", "Recruitment", and "Training/Prof Dev – Certificated" (repeated at the bottom). A scrollbar is visible on the right side of the list.

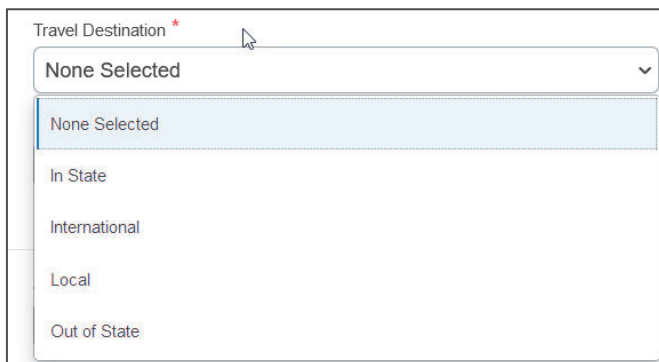
9. Enter "Start Date" and "End Date." Start Day is the day employee is leaving and End Date is the day the employee is returning.



The screenshot shows two input fields for dates. The "Start Date *" field contains "09/11/2023" and has a calendar icon to its right. The "End Date *" field contains "09/11/2023" and also has a calendar icon to its right.

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

****If the conference location is less than 45 miles, the travel destination is LOCAL****



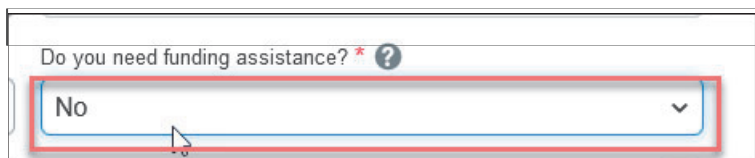
A screenshot of a web form field labeled "Travel Destination *". The dropdown menu is open, showing the following options: "None Selected" (highlighted), "In State", "International", "Local", and "Out of State".

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.



A screenshot of a web form field labeled "Purpose *". The field is a large text input box with a character count "0/48" in the top right corner. The field is currently empty.

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.



A screenshot of a web form field labeled "Do you need funding assistance? * ?". The dropdown menu is open, showing the option "No" (highlighted). The field is currently empty.

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

Freeze Justification *

None Selected

None Selected

Award Ceremony Recipient or Participant

Chaperone Reimbursement

Grant Requirement

Legislative Meeting/Purpose

Mandatory Training/Certification

Other-enter explanation in Request Purpose

Grant Requirement

Legislative Meeting/Purpose

Mandatory Training/Certification

Other-enter explanation in Request Purpose

Presenter

School Instructional Program

School Operations

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

0/500

Cancel Create Request

Last signed in: 01/17/2024 10:28 am

15. Click on “Add” to start inputting your travel expenses. Hotel, airfare, per diem, conference fee, etc.

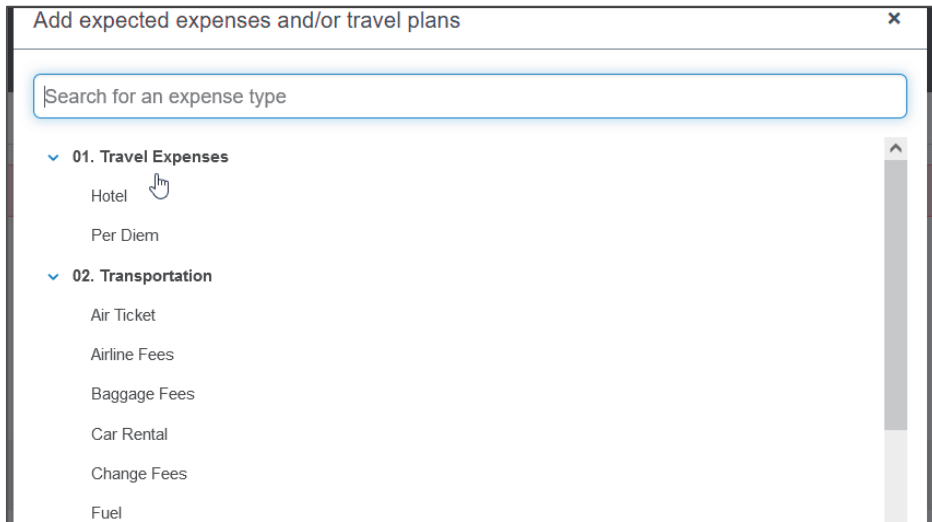
** If it is a no-cost (\$0) trip, add the conference fee and enter the total amount of \$0. Allocation of the funding is still required (after adding the conference expense, skip to # 17)

EXPECTED EXPENSES

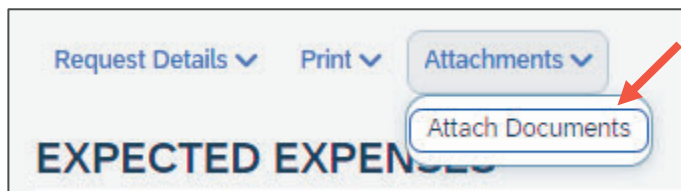
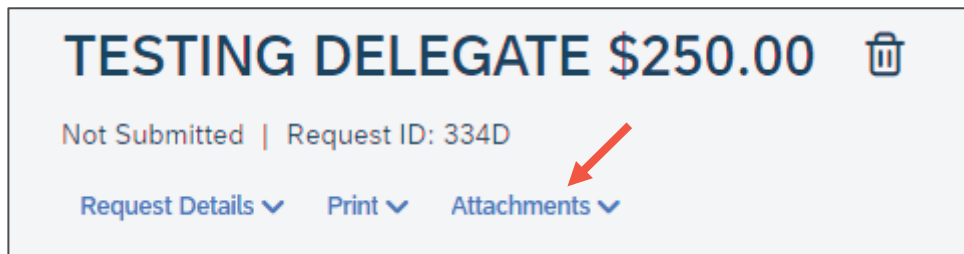
Add Edit Delete Allocate

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.

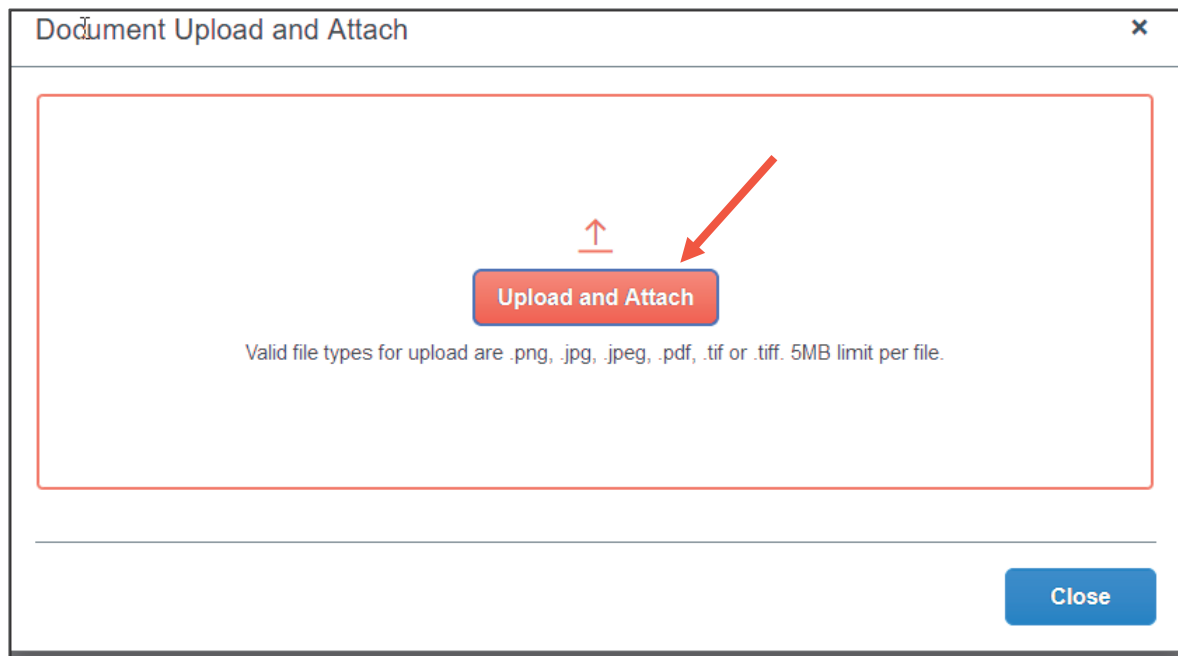
****All fields marked with an * requires an entry****



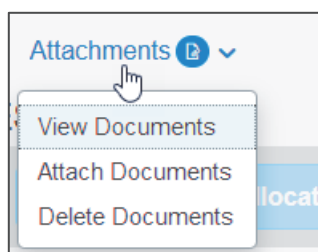
17. Once you've completed adding all estimated expenses for the trip, click on "Attachments" → "Attach Documents" to add the **required** supporting documentation, such as a conference agenda or quotes for estimated airfare or hotel expenses.



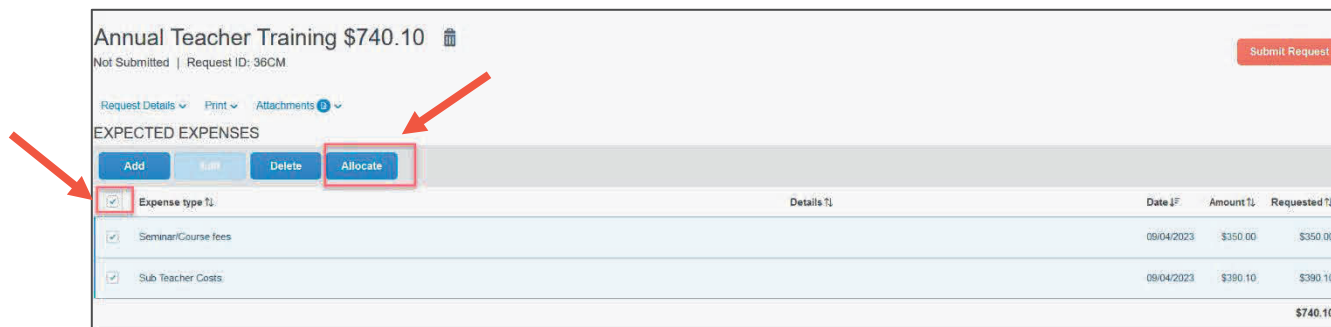
18. You can drag the files into the box or click on “Upload and Attach” to upload supporting documents.



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.”

The screenshot shows the 'Allocate' window with a title bar and a close button. Below the title bar, it says 'Expenses: 2 | \$740.10'. There are two tabs: 'Percent' and 'Amount'. The 'Amount' tab is selected. The 'Amount' section shows '\$740.10' and 'Allocated \$740.10 100%'. A green checkmark indicates 'Remaining \$0.00 0%'. The 'Default Allocation' section shows 'Code: Default' and 'Percent %: 100'. A red arrow points to the 'Add' button, which is highlighted with a red box. Other buttons include 'Edit', 'Remove', and 'Save as Favorite'.

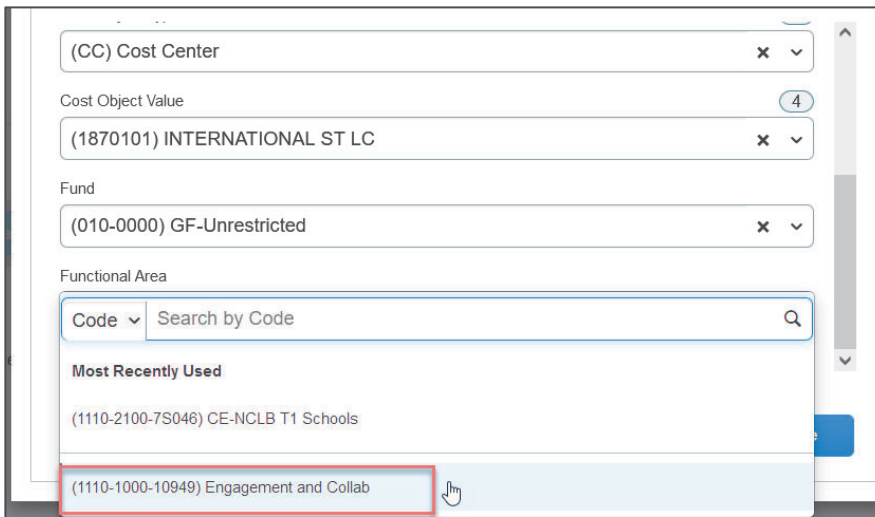
22. By default, the “Cost Object Value” is set to your home cost center. If the funding is being provided by a different cost center, change this value.

The screenshot shows the 'New Allocation' form. It has two tabs: 'New Allocation' and 'Favorite Allocations'. The 'New Allocation' tab is selected. The form has several fields: 'Company Code' (2) with '(1000) LAUSD', 'Cost Object Type' (3) with '(CC) Cost Center', 'Cost Object Value' (4) with '(1870101) INTERNATIONAL ST LC', and 'Fund'. The 'Cost Object Value' field is highlighted with a red box. At the bottom, there are 'Cancel' and 'Save' buttons.

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

The screenshot shows the 'Fund' dropdown menu. It has a search bar with 'Code' and 'Search by Code'. Below the search bar, there is a list of funds. The first fund, '(010-0000) GF-Unrestricted', is highlighted with a red box. Other funds listed include '(010-3010) GF-TIA Low-Inc&Neg', '(010-0000) GF-Unrestricted', '(010-0990) GF-Treasurer's Fund', '(010-1100) GF-State Lottery', '(010-1200) GF-Cls Size Red Gr 9', and '(010-1300) GF-ClassSizeRed, K-3'.

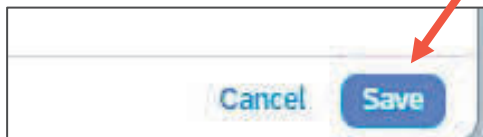
24. Enter the FUNCTIONAL AREA or search by Code or Text to look for and select the appropriate Functional Area value.



The screenshot shows a form with several fields: (CC) Cost Center, Cost Object Value (1870101) INTERNATIONAL ST LC, Fund (010-0000) GF-Unrestricted, and Functional Area. The Functional Area field is open, showing a search bar and a list of options. The option (1110-1000-10949) Engagement and Collab is highlighted with a red box and a mouse cursor.



25. Click “Save” when done. Then click “Save” again.

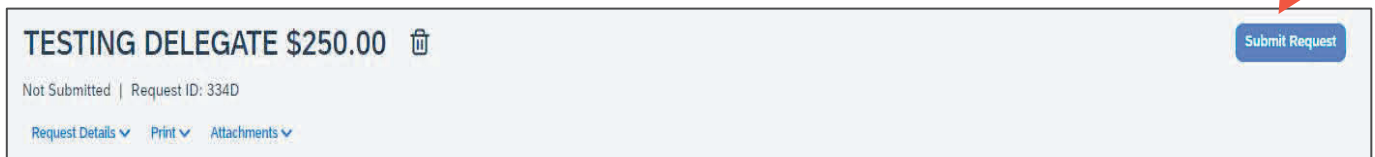
****You can split funding by Percent or Dollar Amount if necessary. To add another expense budget line, click “Add” (step 18). You can allocate in percentages or an exact amount****



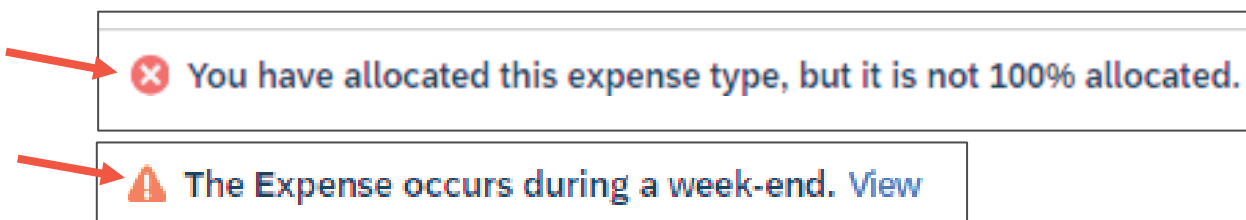
The screenshot shows a button labeled "Save" with a red arrow pointing to it. A "Cancel" button is also visible to the left.

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.**

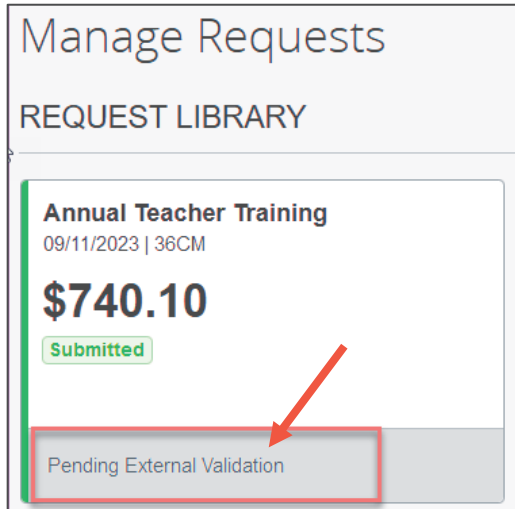


The screenshot shows a button labeled "Submit Request" with a red arrow pointing to it. The button is located next to the text "TESTING DELEGATE \$250.00". Below the button, there is a status bar that says "Not Submitted | Request ID: 334D" and links for "Request Details", "Print", and "Attachments".

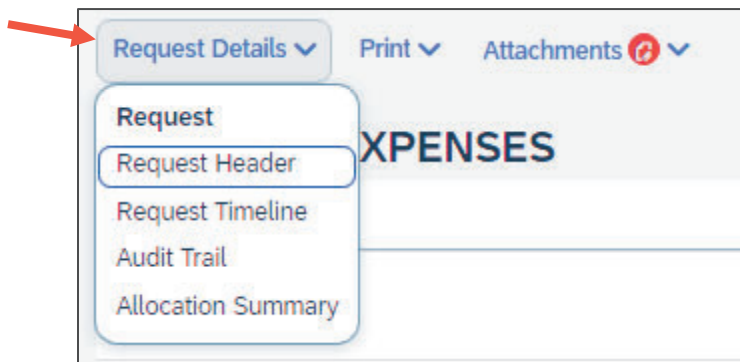


The screenshot shows two error messages. The first message is a red warning sign followed by the text "You have allocated this expense type, but it is not 100% allocated." The second message is an orange warning sign followed by the text "The Expense occurs during a week-end. View". Red arrows point to each message.

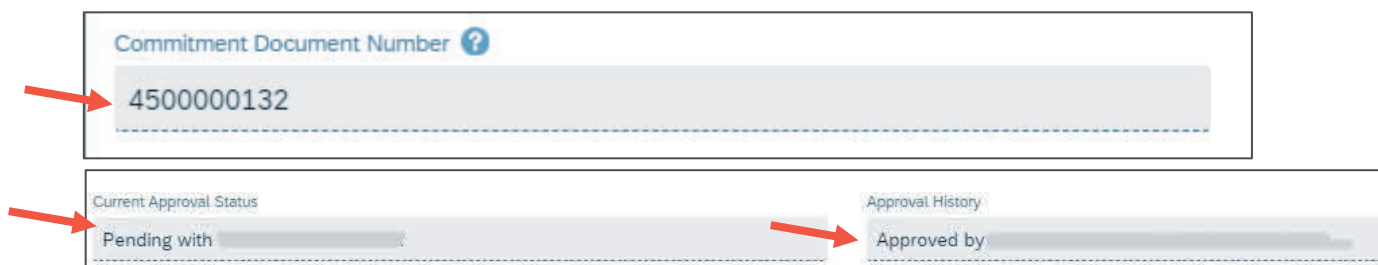
27. Once the request is submitted, the tile for the Travel Request will show “Pending External Validation”. If budget check is successful, the request will route to the appropriate approvers. If budget check fails then the request will return with an error message.



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 when the request is approved. Refer to the job aid “How to Book Travel in Concur” if you need further assistance.

