

SUBMITTING A TRAVEL REQUEST ON BEHALF OF AN EMPLOYEE

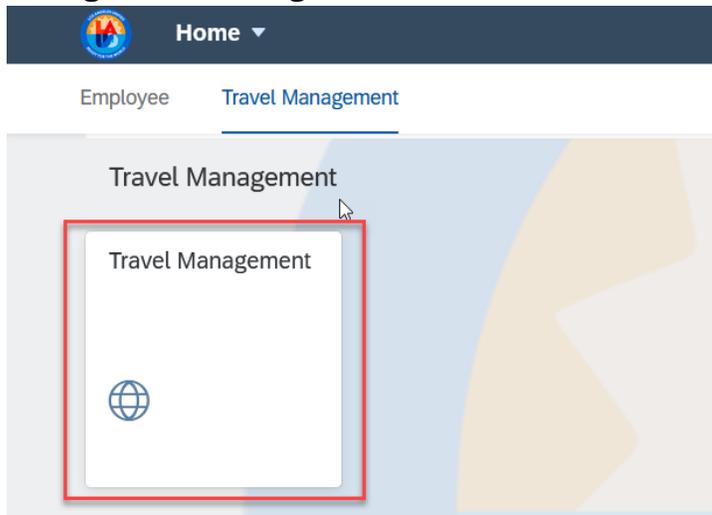
Description: This job aid is to provide step-by-step instructions for creating and submitting a travel request on behalf of another employee in Concur.

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.

A travel request can be submitted with or without a Site Travel Specialist (STS) assistance for entering funding allocation for the trip.

Here are step-by-step instructions for creating and submitting a travel request in Concur:

1. Log in to ESS (<https://ess.lausd.net>) with your SSO and click on the “Travel Management” tile to go to Concur.

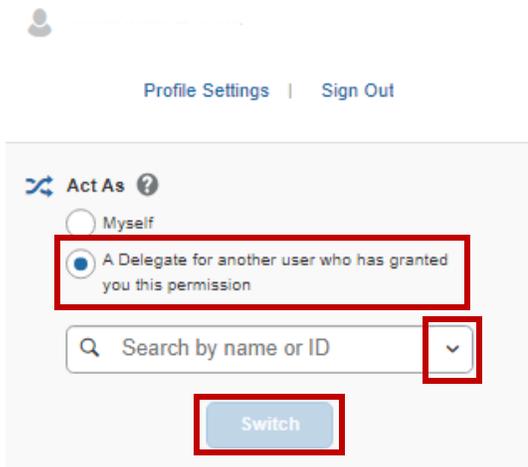


2. In Concur, click on “Profile”.



- 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, see [How to Assign a Delegate*](#)*



- You should see the status “Acting as _____”.



- Select “Start a Request.”



- “Create New Request” entry screen will display. Note that all fields marked with an * requires an entry. Enter a name for the “Request Name” field. You can also enter an additional description or trip purpose in the “Purpose” field.

Create New Request

Request Policy: *LAUSD Request Policy - School

Request Name *: Annual Teacher Training

7. Select the appropriate trip activity from the “Trip Activity Type List” drop-down selection options

Trip Activity Type List *

Training/Prof Dev – Certificated

- Other Travel
- Peer Review
- Plant Inspection
- Recruitment
- Training/Prof Dev – Certificated

8. Enter “Start Date” and “End Date.” Generally, Start Date should be the trip start date, and End Date should be the trip end date.

Start Date *: 09/11/2023

End Date *: 09/11/2023

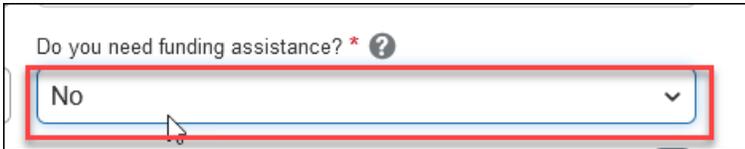
9. For “Travel Destination,” select whether the trip is Local, In State, Out of State, or International. The difference between Local and In State category is that In State should be selected if the trip destination is greater than 45 miles from the work location.

Travel Destination *

None Selected

- None Selected
- In State
- International
- Local
- Out of State

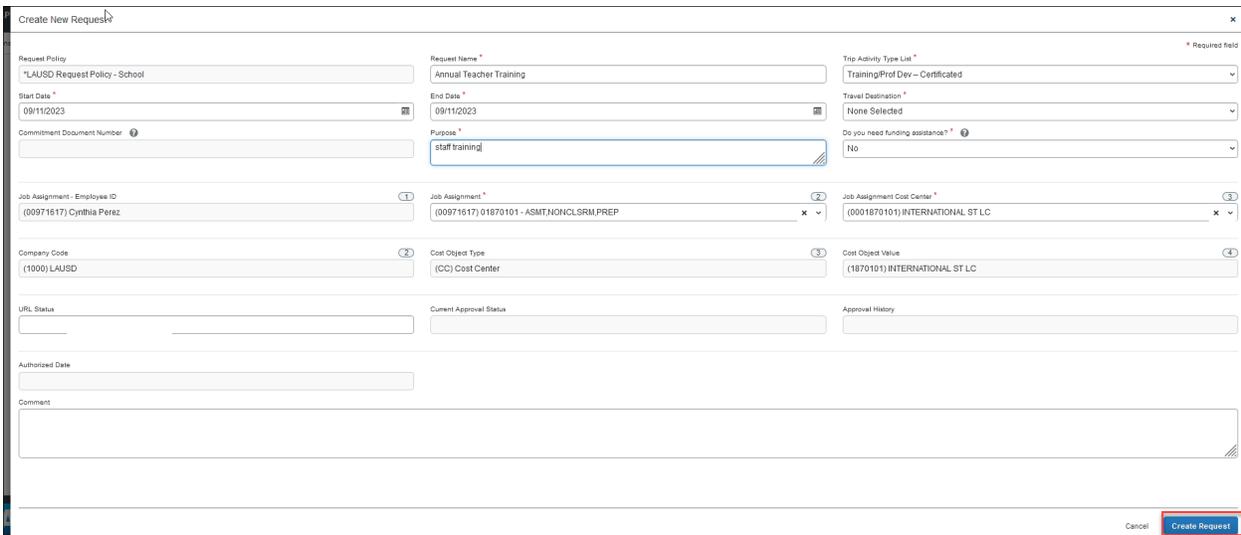
10. If the request is being submitted without an STS assistance to complete the funding allocation information, select “No.” If you need an STS assistance, select “Yes.”



Do you need funding assistance? * ?

No

11. The “Comments” field is optional if you want to add any additional information. Once all the required fields are entered, click on “Create Request.” Note that your Job Assignment and Cost Center information is already pre-populated.



Create New Request

Request Policy: LAUSD Request Policy - School

Request Name: Annual Teacher Training

Trip Activity Type List: Training/Prof Dev - Certificated

Start Date: 09/11/2023

End Date: 09/11/2023

Travel Destination: None Selected

Commitment Document Number: [Empty]

Purpose: staff training

Do you need funding assistance?: No

Job Assignment - Employee ID: (00971617) Cynthia Perez

Job Assignment: (00971617) 01670101 - ASMT/JONCLSRM,PREP

Job Assignment Cost Center: (0001670101) INTERNATIONAL ST LC

Company Code: (1000) LAUSD

Cost Object Type: (CC) Cost Center

Cost Object Value: (1670101) INTERNATIONAL ST LC

URL Status: [Empty]

Current Approval Status: [Empty]

Approval History: [Empty]

Authorized Date: [Empty]

Comment: [Empty]

Cancel Create Request

12. Note that a Request ID has been created. Click on “Add” to add estimated expenses for the upcoming trip.



Annual Teacher Training

Not Submitted Request ID: 36CM

Submit Request

Request Details Print Attachments

EXPECTED EXPENSES

Add Edit Delete Allocate

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

Add expected expenses and/or travel plans

Search for an expense type

- 01. Travel Expenses**
 - Hotel
 - Per Diem
- 02. Transportation**
 - Air Ticket
 - Airline Fees
 - Baggage Fees
 - Car Rental
 - Change Fees
 - Fuel
 - Parking
 - Personal Car Mileage
 - Public Transport
 - Taxi
 - Train

New Expense: Seminar/Course fees \$350.00

09/04/2023

Transaction Date * 09/04/2023

Business Purpose staff training

Transaction Amount * 350.00

Currency * US, Dollar

Vendor Name * National Teachers Association

Comment

Save Cancel

New Expense: Sub Teacher Costs

09/04/2023

Business Purpose staff training

Trip Start Date * 09/11/2023

Trip End Date * 09/11/2023

Total Number of Days * 1

Transaction Amount

Currency US, Dollar

Comment

Save Cancel

14. Once you completed adding all estimated expenses for the trip, click on “Attachments” and select “Attach Documents” to add any supporting documentation, such as a conference agenda or quotes for estimated airfare or hotel expenses.

Annual Teacher Training \$740.10 

Not Submitted | Request ID: 36CM Submit Request

Request Details Print Attachments Attach Documents

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/> Expense type ^{TL}	Details ^{TL}	Date ^{LF}	Amount ^{TL}	Requested ^{TL}
<input type="checkbox"/> Seminar/Course fees		09/04/2023	\$350.00	\$350.00
<input type="checkbox"/> Sub Teacher Costs		09/04/2023	\$390.10	\$390.10
				\$740.10

15. Click on “Upload and Attach” to upload supporting documents.

Document Upload and Attach ✕



Upload and Attach

Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.

Close

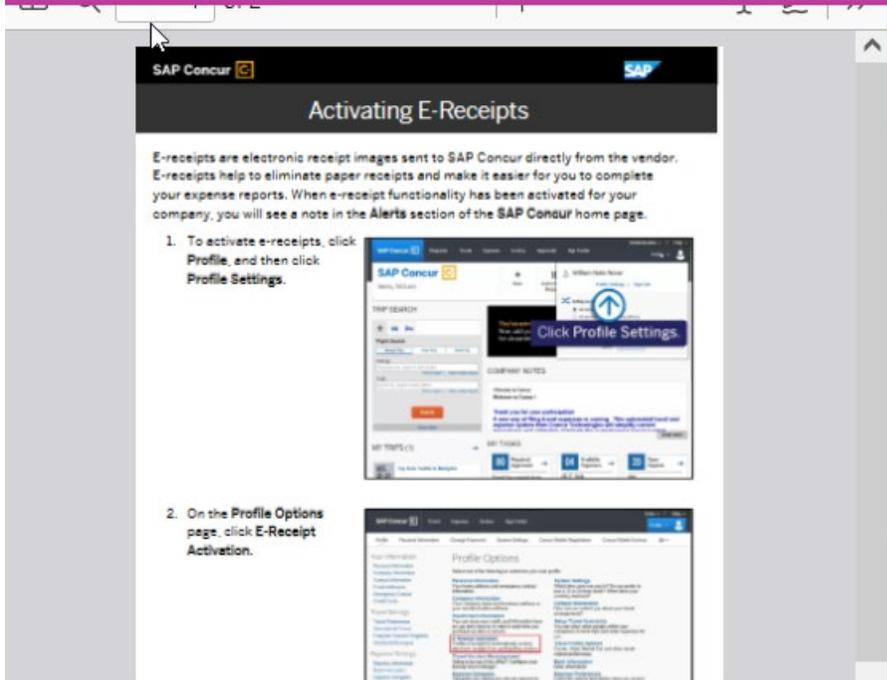
16. Once an attachment has been uploaded, you should see the options to view, attach, or delete documents.

Attachments  ▼

 View Documents

Attach Documents

Delete Documents



17. If this is a request being submitted with “No” to funding allocation entry assistance by an STS, you are responsible for entering the funding allocation. Check-mark to highlight the expenses and click on “Allocate.”

Annual Teacher Training \$740.10  Submit Request

Not Submitted | Request ID: 36CM

Request Details  Print  Attachments 

EXPECTED EXPENSES

Add Edit Delete Allocate

<input checked="" type="checkbox"/>	Expense type 	Details 	Date 	Amount 	Requested 
<input checked="" type="checkbox"/>	Seminar/Course fees		09/04/2023	\$350.00	\$350.00
<input checked="" type="checkbox"/>	Sub Teacher Costs		09/04/2023	\$390.10	\$390.10
					\$740.10

18. Click on “Add.”

Allocate x

Expenses: 2 | \$740.10

Percent Amount

Amount \$740.10	Allocated \$740.10 100%	✔ Remaining \$0.00 0%
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Default Allocation

Code Default	Percent % 100
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Add Edit Remove Save as Favorite

No Allocations

These expenses are assigned to your default allocation shown above. Click the allocate button to allocate part or all of these expenses differently.

19. By default, the “Cost Object Value” is set to your home cost center; however, this value can be changed if the funding is provided by another cost center.

The screenshot shows the 'Add Allocation' dialog box with the following fields:

- Company Code:** (1000) LAUSD
- Cost Object Type:** (CC) Cost Center
- Cost Object Value:** (1870101) INTERNATIONAL ST LC (highlighted with a red box)
- Fund:** (empty dropdown)

Buttons: Cancel, Save

20. For “Fund,” enter the Fund or search by Code or Text to look for and select the appropriate Fund value.

The screenshot shows the 'Fund' search dropdown menu with the following options:

- Most Recently Used:**
 - (010-0000) GF-Unrestricted (highlighted with a red box)
 - (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-Clis Size Red Gr 9
- (010-1300) GF-ClassSizeRed, K-3
- (010-1400) GF-EduProtectionAcct
- (010-2200) GF-Continuation Educ
- (010-2430) GF-Community Day Sch

21. For “Functional Area,” enter the Functional Area or search by Code or Text to look for and select the appropriate Functional Area value.

Add Allocation x

+ **★**

New Allocation Favorite Allocations

(CC) Cost Center x v

Cost Object Value 4

(1870101) INTERNATIONAL ST LC x v

Fund

(010-0000) GF-Unrestricted x v

Functional Area

Code v Search by Code Q

Most Recently Used

(1110-2100-7S046) CE-NCLB T1 Schools

(1110-1000-10949) Engagement and Collab x v

22. Click on "Save" when done.

Add Allocation x

+ **★**

New Allocation Favorite Allocations

(CC) Cost Center x v

Cost Object Value 4

(1870101) INTERNATIONAL ST LC x v

Fund

(010-0000) GF-Unrestricted x v

Functional Area

(1110-1000-10949) Engagement and Collab x v

Cancel **Save**

23. Click on "Save" again. Note that you can split funding by Percent or Amount if necessary.

Allocate x

Expenses: 2 | \$740.10

Percent | Amount

Amount: \$740.10 | Allocated \$740.10 (100%) | Remaining \$0.00 (0%)

Default Allocation

Code: Default | Percent %: 0

Buttons: Add, Edit, Remove, Save as Favorite

<input type="checkbox"/>	Logical System TL	Company Code TL	Cost Object Type TL	Cost Object Value TL	Fund TL	Functional Area TL	Code TL	Percent %
<input type="checkbox"/>	ECC QUALITY Client	LAUSD	Cost Center	INTERNATIONAL ST LC	GF-Unrestricted	Engagement and Collab	QR5910-1000-CC-1870101-010-0000-1110-1000-10949	100

Cancel | **Save**

24. Click on “Submit Request” to submit the request.

Annual Teacher Training \$740.10 Submit Request

Not Submitted | Request ID: 36CM

Request Details | Print | Attachments

EXPECTED EXPENSES

Buttons: Add, Edit, Delete, Allocate

<input type="checkbox"/>	Expense type TL	Details TL	Date LP	Amount TL	Requested TL
<input type="checkbox"/>	Seminar/Course fees		09/04/2023	\$350.00	\$350.00 <i>Allocated</i>
<input type="checkbox"/>	Sub Teacher Costs		09/04/2023	\$390.10	\$390.10 <i>Allocated</i>
					\$740.10

25. Once the request has been submitted, the tile for the Expense Report shows that it is “Pending External Validation,” which means that it has routed to the SAP ECC Funds Management for budget check for funding line validity (combo) and budget availability (AVC) validation. If budget check is successful, then funds will be encumbered for the expense, and the request will route to the appropriate approvers. If budget check fails, then appropriate error message, along with the expense report, will be returned to you in Concur. *Note that if the request was submitted with “Yes” to funding assistance by STS, then it will first route to the STS to complete the funding allocation information. The request tile will display the name of the STS.*

Manage Requests

REQUEST LIBRARY

Annual Teacher Training
09/11/2023 | 36CM

\$740.10

Submitted

Pending External Validation