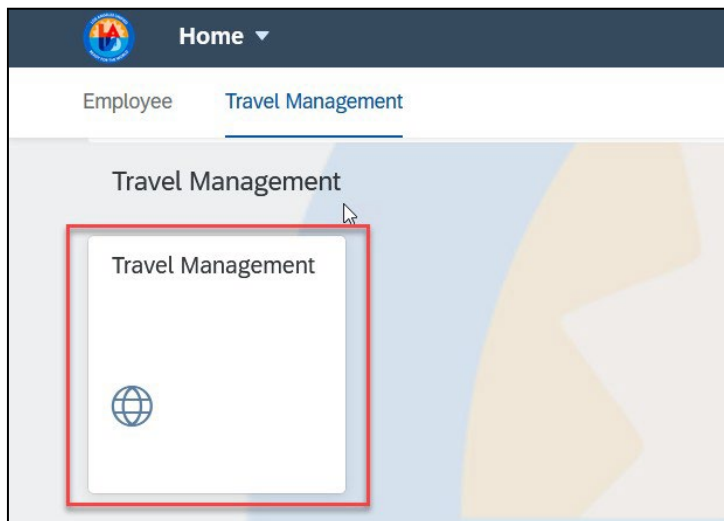


HOW TO SUBMIT A TRAVEL REQUEST IN CONCUR

This job aid is to provide step-by-step instructions for creating and submitting a travel request 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 the “Travel Management” tile. Concur website will open. Click [here](#) to access Concur when offsite.

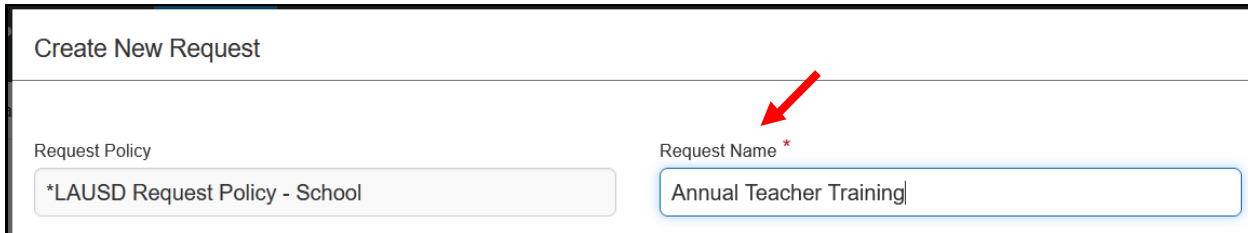


2. Select “Start a Request.”



3. "Create New Request" screen will display. Enter the name of the conference or event name as shown on the flyer under "Request Name". (Ex: CUBE, 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

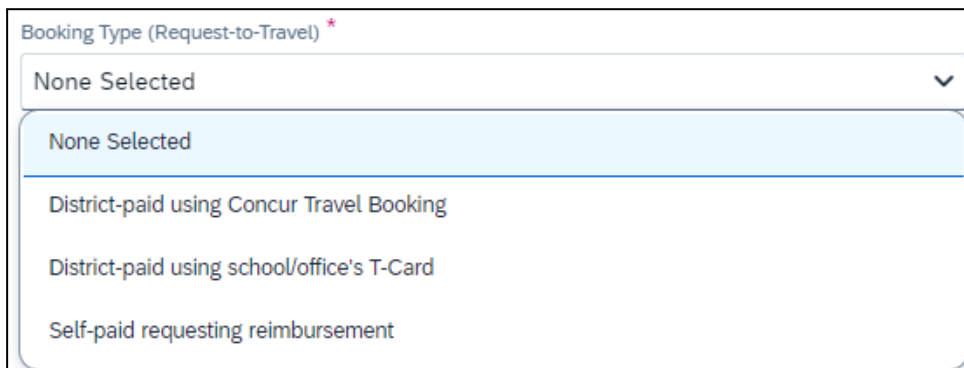
4. Select the Booking Type.

District-paid using Concur Travel Booking: Using the District's virtual card and book through Concur Booking tool. The virtual card can only be used to pay airfare/hotel fees; conference fee cannot be paid with the virtual card.

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: You must book your travel expenses outside of the Concur Booking tool

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



Booking Type (Request-to-Travel) *

None Selected

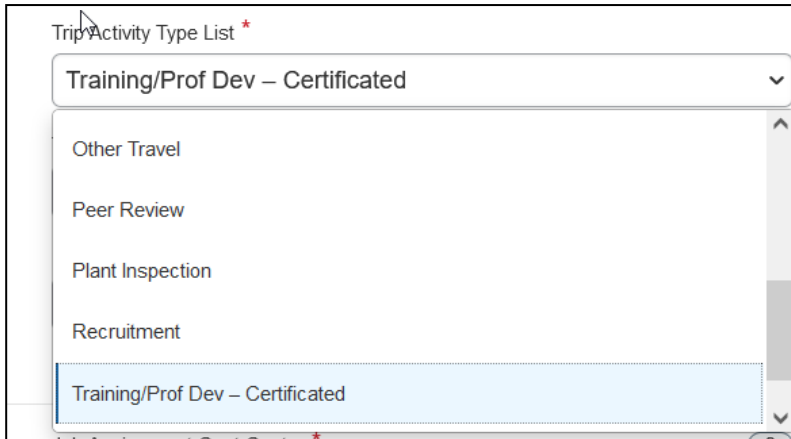
None Selected

District-paid using Concur Travel Booking

District-paid using school/office's T-Card

Self-paid requesting reimbursement

5. 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

6. Enter “Start Date” and “End Date.” Start Day is the day employee is leaving and End Date is the day the employee is returning.



Start Date *

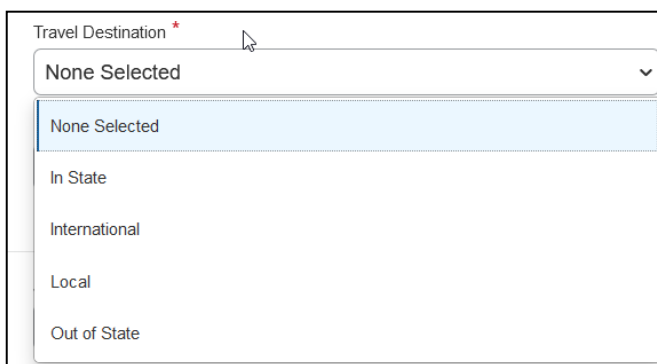
09/11/2023

End Date *

09/11/2023

7. 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****



Travel Destination *

None Selected

None Selected

In State

International

Local

Out of State

8. Provide a ‘Purpose’ for the travel request. Do not enter the conference name again, enter the reason **why** you are attending the conference/event.



Purpose *

0/48

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

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

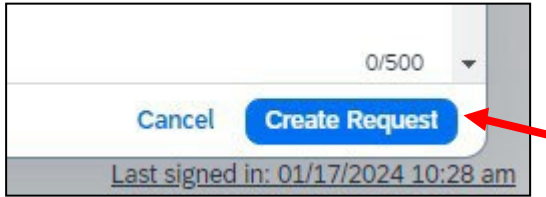
- Grant Requirement
- Legislative Meeting/Purpose
- Mandatory Training/Certification
- Other-enter explanation in Request Purpose
- Presenter
- School Instructional Program
- School Operations

10. Do you need funding assistance is defaulted to NO. A funding line must be provided when allocating the travel expenses.

Do you need funding assistance? * ?

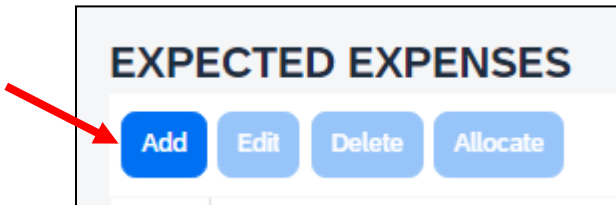
No

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



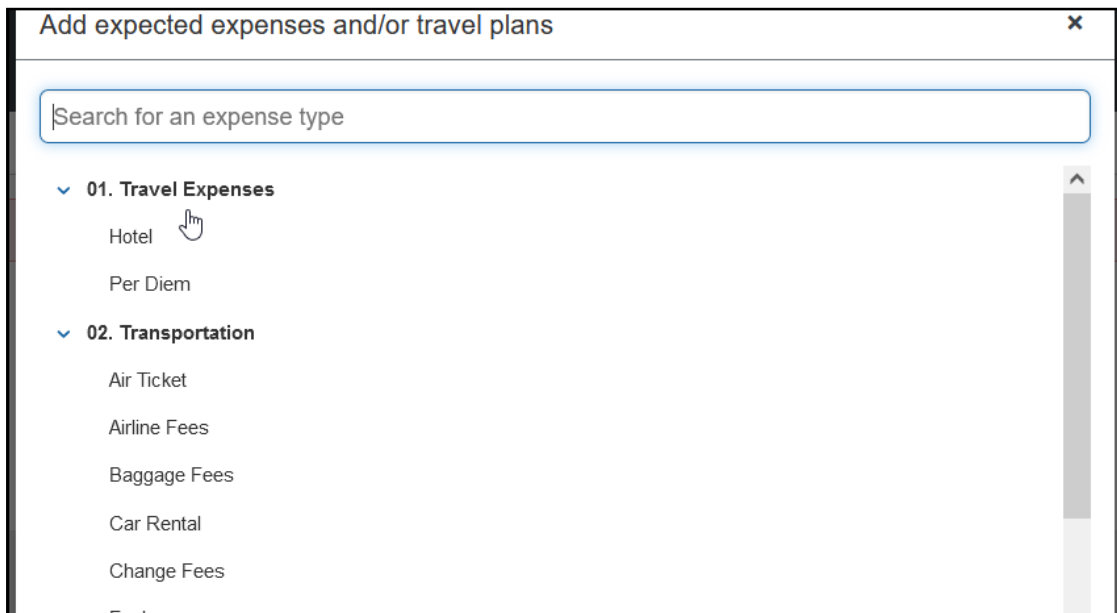
12. Click on “Add” to start inputting your travel expenses. Hotel, airfare, per diem, conference fee, etc.

**** 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 #14)**

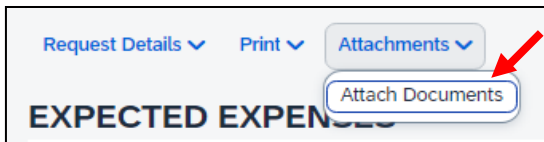
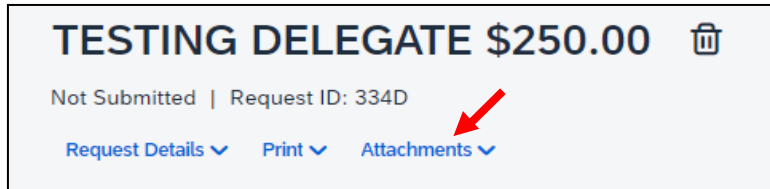


13. Select the expense types that are appropriate for your trip and for each expense type screen, enter the required information, and click on Save.

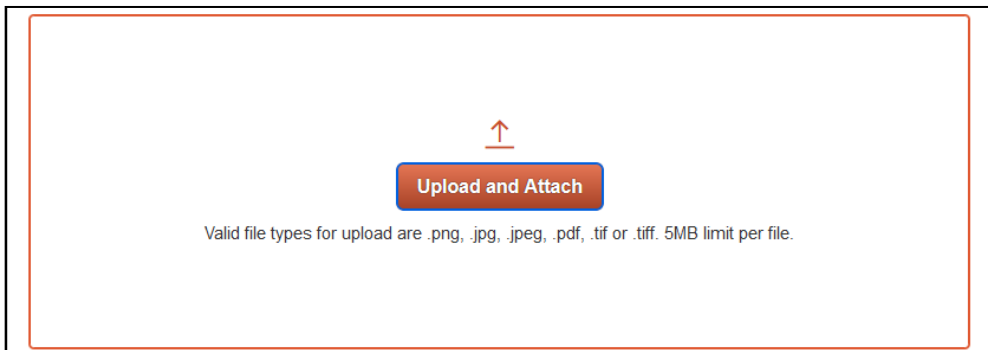
****All fields marked with an * requires an entry****



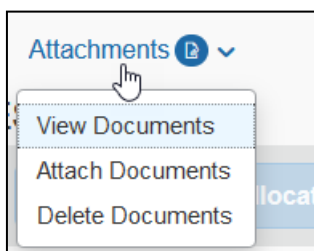
14. Once you completed adding all estimated expenses for the trip, click on “Attachments” → “Attach Documents” to add the **required** supporting documentation, i.e., conference brochure/flyer or quotes for estimated airfare or hotel expenses and the Division of Instruction Justification questions (required for schools a departments under DOI).




15. Click “Attachments” → “Attach Documents” to upload required documents. You can drag the files into the box or click on “Upload and Attach” to upload supporting documents.



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



- If you are entering in the expense budget line (funding allocation). Checkmark to highlight the expenses and click on “Allocate.” Skip this step if the Site Travel Specialist is providing the funding.

Annual Teacher Training \$740.10 

Not Submitted | Request ID: 36CM Submit Request

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

- Click “Add.”

Allocate ×

Expenses: 2 | \$740.10

Percent Amount

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

Default Allocation

Code	Percent %
Default	100

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.

- 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.**

+ ★

New Allocation Favorite Allocations

Company Code 2

(1000) LAUSD × ▼

Cost Object Type 3

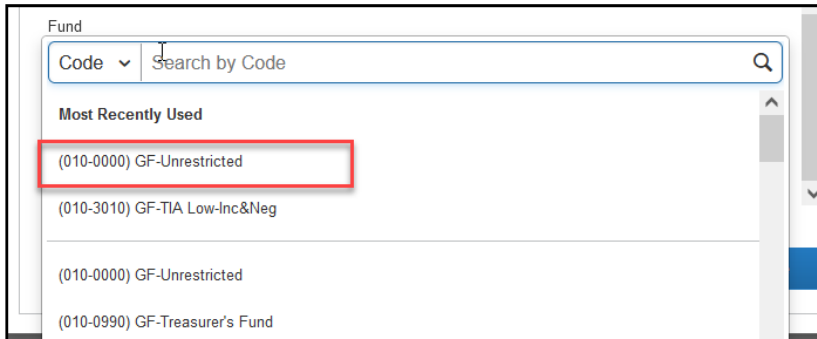
(CC) Cost Center × ▼

Cost Object Value 4

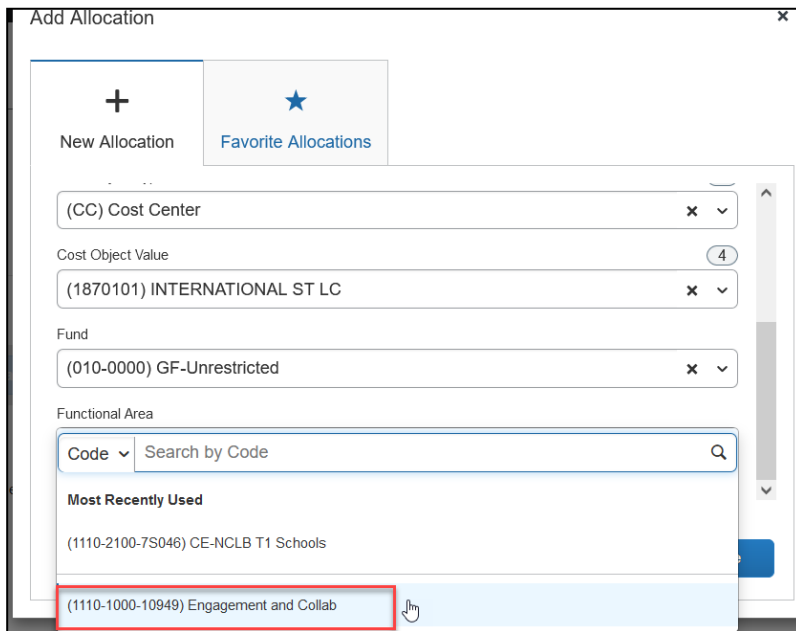
(1870101) INTERNATIONAL ST LC × ▼

Fund

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

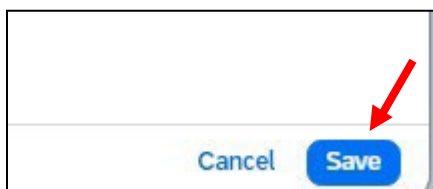


21. Enter the FUNCTIONAL AREA or search by Code or Text to look for and select the appropriate Functional Area value.





22. Click "Save" when done. Then click "Save" again.

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



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

****If you have a  red X 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.**



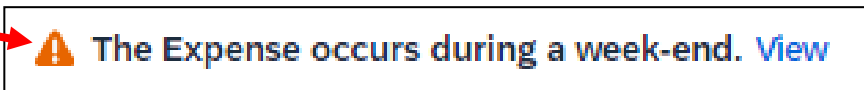
TESTING DELEGATE \$250.00  [Submit Request](#)


Not Submitted | Request ID: 334D

[Request Details](#) [Print](#) [Attachments](#)

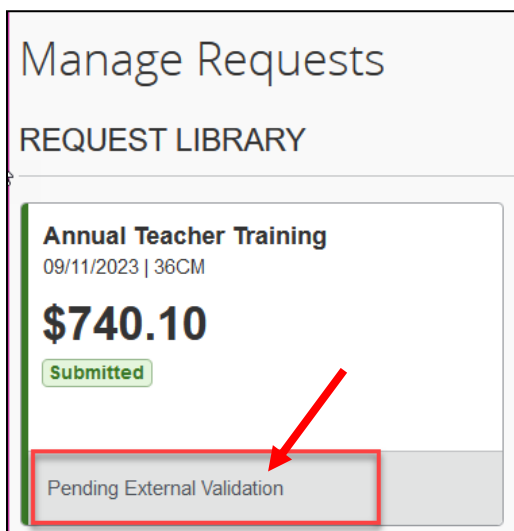


 You have allocated this expense type, but it is not 100% allocated.



 The Expense occurs during a week-end. [View](#)

24. Once the request has been 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.



Manage Requests

REQUEST LIBRARY

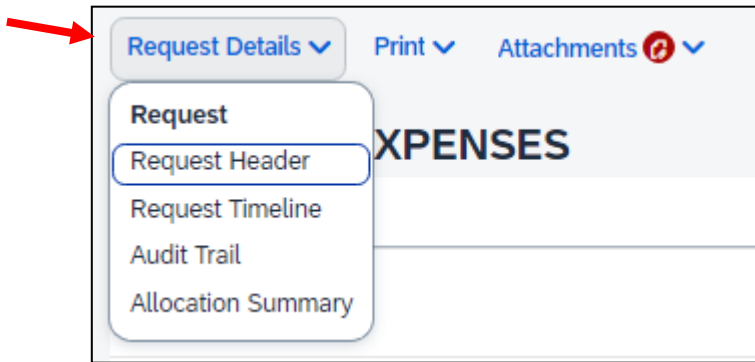
Annual Teacher Training
09/11/2023 | 36CM

\$740.10

[Submitted](#)

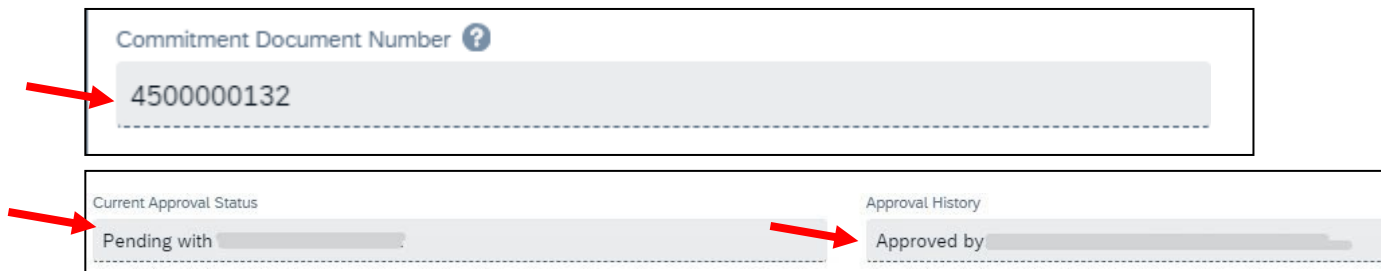
[Pending External Validation](#)

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



26. 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****



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

