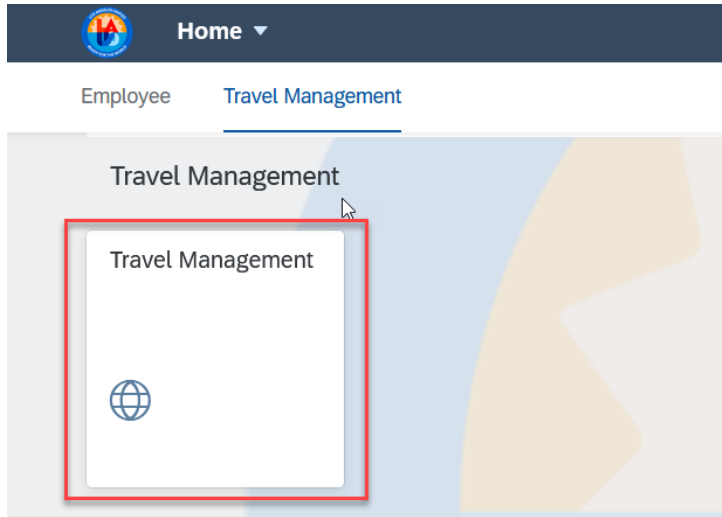


SUBMITTING A TRAVEL REQUEST ON BEHALF OF AN EMPLOYEE

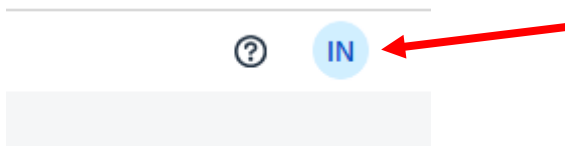
This job aid is to provide step-by-step instructions for creating and submitting a travel request on behalf of another employee in Concur

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 the “Travel Management” title. Concur website will open.

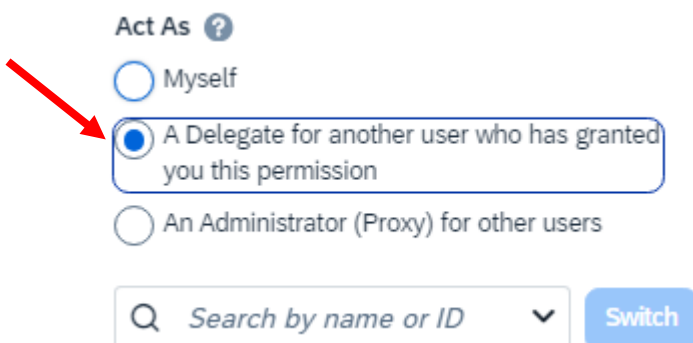


2. In Concur, click on your name initial located on the top right corner.



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”.

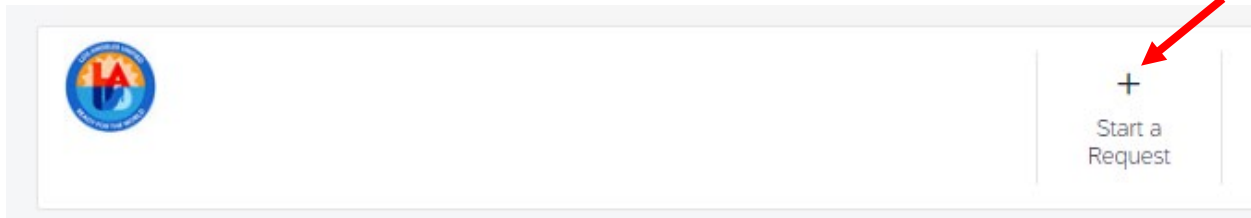
***If the name of the employee you are trying to create the trip for does not show up, ask the employee to follow [How to Assign a Delegate](#). If the employee does not have access to Concur, contact the Travel Unit.**



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



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: CABA, Spring CUE, AVID, Legislative Policy Meeting)

****All fields marked with an * requires an entry. The greyed-out field cannot be modified****

A form titled "Create New Request". It has two input fields: "Request Policy" with the value "*LAUSD Request Policy - School" and "Request Name" with the value "Annual Teacher Training". A red arrow points to the "Request Name" field. The "Request Policy" field is greyed out.

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

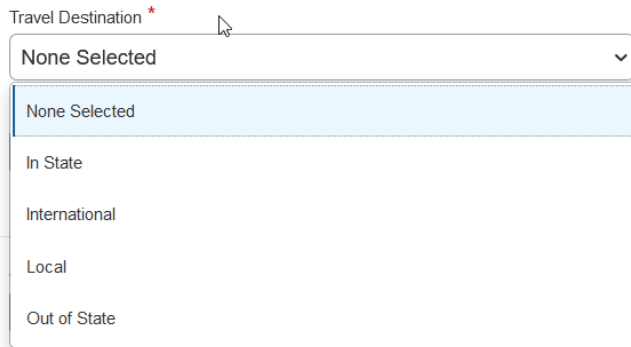
A dropdown menu titled "Trip Activity Type List". The selected option is "Training/Prof Dev – Certificated". Other options visible include "Other Travel", "Peer Review", "Plant Inspection", and "Recruitment".

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

Two date input fields. The first is labeled "Start Date" and contains "09/11/2023". The second is labeled "End Date" and contains "09/11/2023". Both fields have a calendar icon to their right.

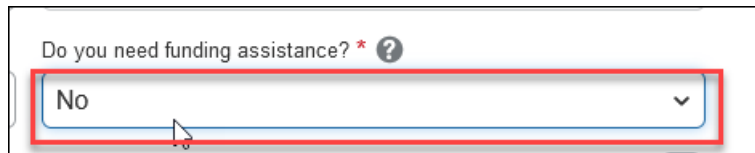
9. For “Travel Destination,” select whether the trip is Local, In State, Out of State, or International.

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



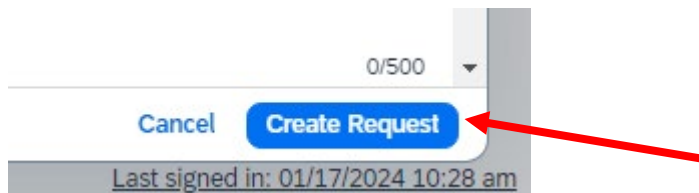
A screenshot of a web form field labeled "Travel Destination *". The dropdown menu is open, showing the following options: "None Selected" (highlighted), "In State", "International", "Local", and "Out of State".

10. Choose NO to the question “Do you need funding assistance”. Because you are the delegate, you are required to provide the funding allocation.



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

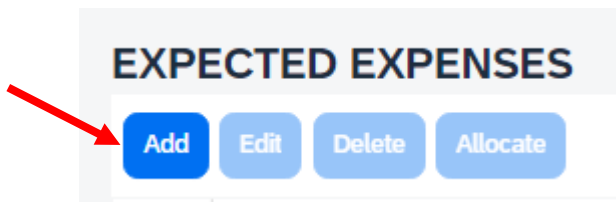
11. When you completed filling out the page, click on “Create Request”.



A screenshot of a form footer. It includes a "Cancel" button, a blue "Create Request" button (highlighted by a red arrow), and a text field showing "0/500". Below the buttons, it says "Last signed in: 01/17/2024 10:28 am".

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 # 17)**



A screenshot of a section titled "EXPECTED EXPENSES". Below the title are four buttons: "Add" (highlighted by a red arrow), "Edit", "Delete", and "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.

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

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

Transaction Amount * 350.00


Currency * US, Dollar

Business Purpose staff training

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

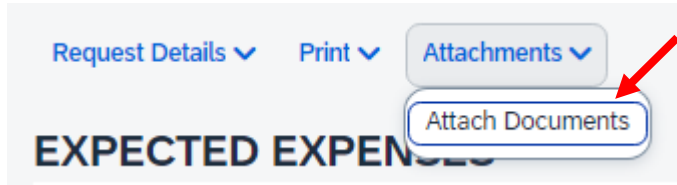
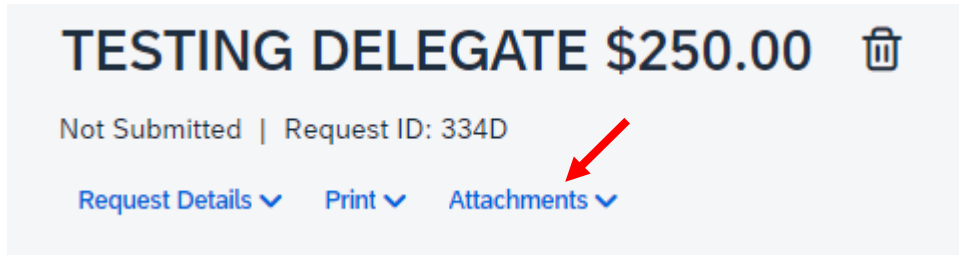
Currency US, Dollar

Comment

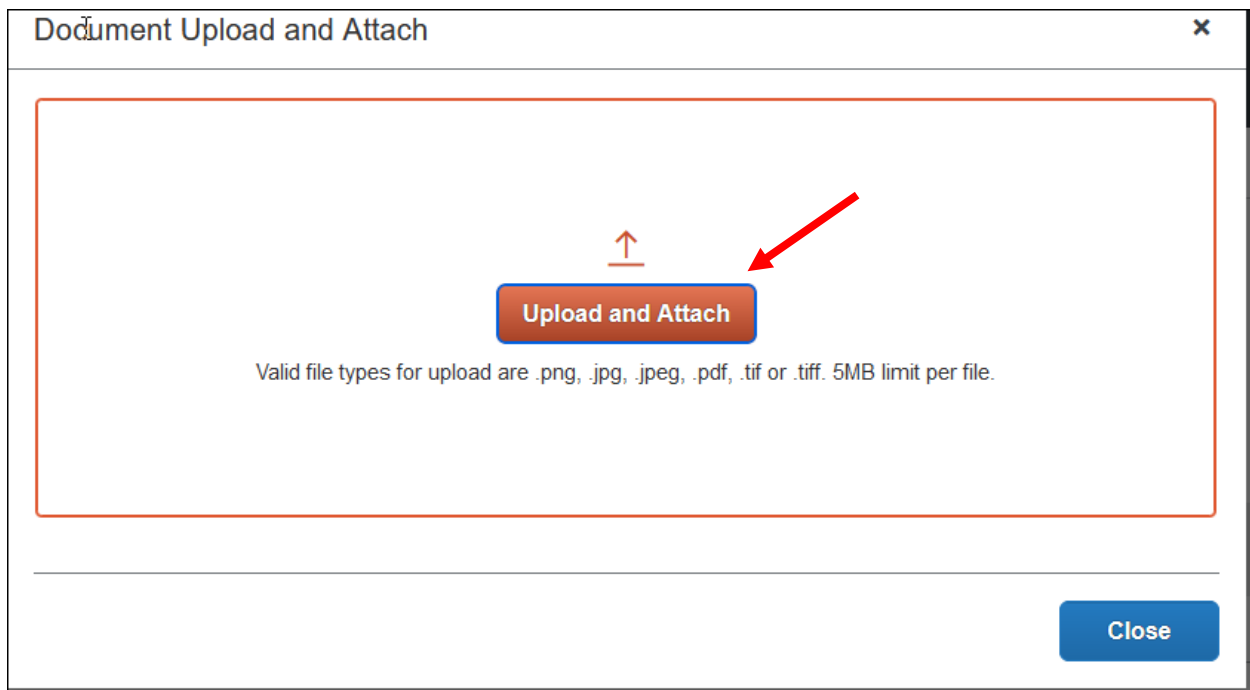
Save Cancel



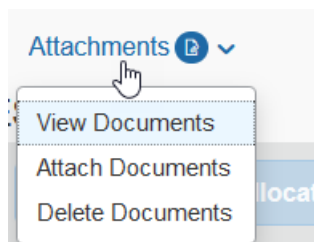
14. Once you completed adding all estimated expenses for the trip, click on “Attachments” → “Attach Documents” to add the **required** supporting documentation, such as a conference agenda or quotes for estimated airfare or hotel expenses.



15. 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.



17. Enter the expense budget line (funding allocation). Checkmark to highlight the expenses and click on "Allocate."

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

18. Click "Add."

Allocate ×

Expenses: 2 | \$740.10

Percent Amount

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

Default Allocation

Code: Default | Percent %: 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.

19. 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 x v

Cost Object Type 3

(CC) Cost Center x v

Cost Object Value 4

(1870101) INTERNATIONAL ST LC x v

Fund

Cancel Save

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

Fund

Code ▾ Search by Code

Most Recently Used

- (010-0000) GF-Unrestricted
- (010-3010) GF-TIA Low-Inc&Neg
- (010-0990) GF-Treasurer's Fund
- (010-1100) GF-State Lottery
- (010-1200) GF-Clas 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. 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 ▾

Cost Object Value 4 ▾

(1870101) INTERNATIONAL ST LC x ▾

Fund (010-0000) GF-Unrestricted x ▾

Functional Area

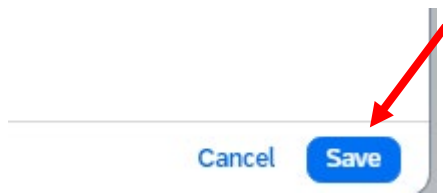
Code ▾ Search by Code

Most Recently Used



- (1110-2100-7S046) CE-NCLB T1 Schools
- (1110-1000-10949) Engagement and Collab

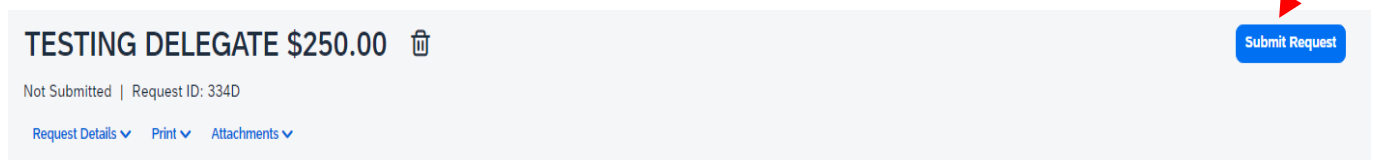
22. Click “Save” when done. Then click ”Save” again.

****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.

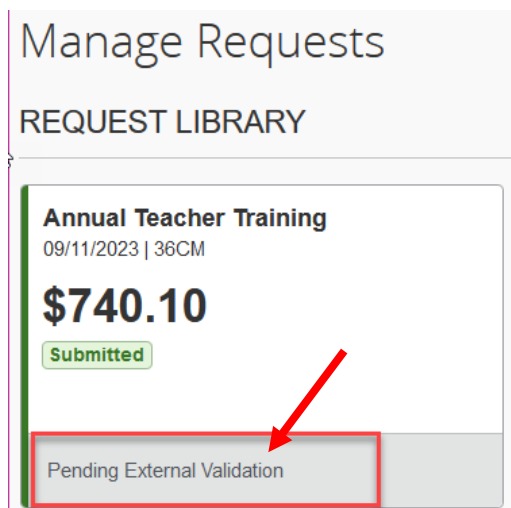
****If you have a  red X warning sign, you will not be able to submit the request until you act on the error message. You can still submit the request with the  orange warning sign**



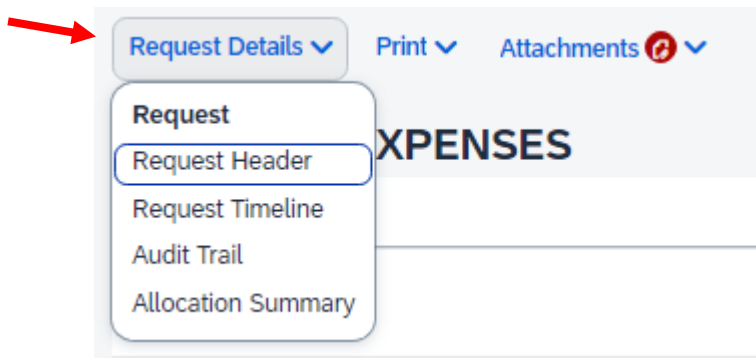
 You have allocated this expense type, but it is not 100% allocated.

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

24. 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.



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 request successfully passed budget check. 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.****

