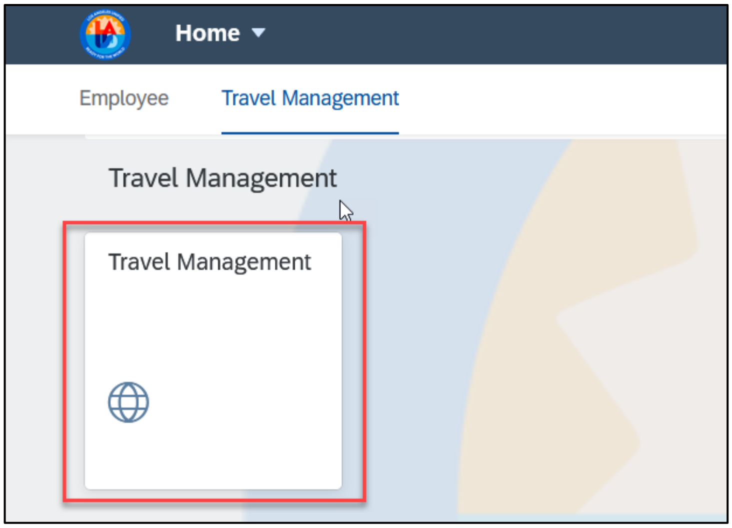
HOW TO SUBMIT A TRAVEL REQUEST IN CONCUR

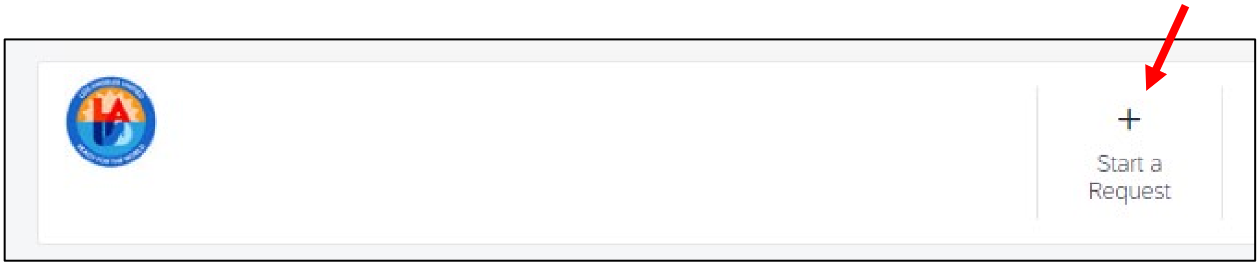
This job aid is to provide step-by-step instructions for creating and submitting a travel request on behalf of another employee in Concur

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.

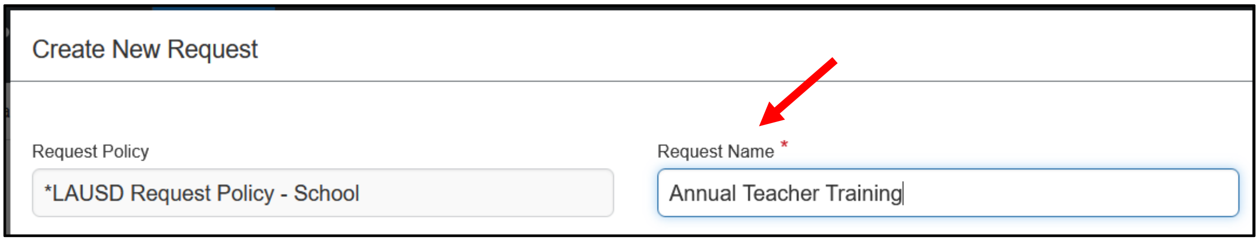
1. Log in to ESS (https://ess.lausd.net) with your SSO and click on the "Travel Management" title. Concur website will open.



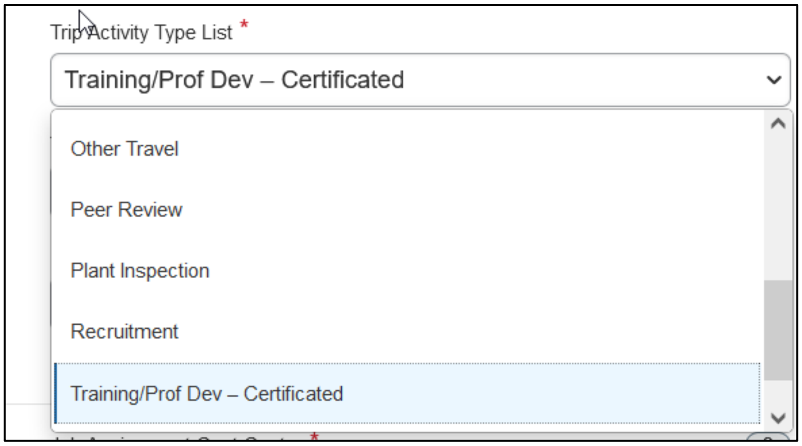
2. Select "Start a Request."



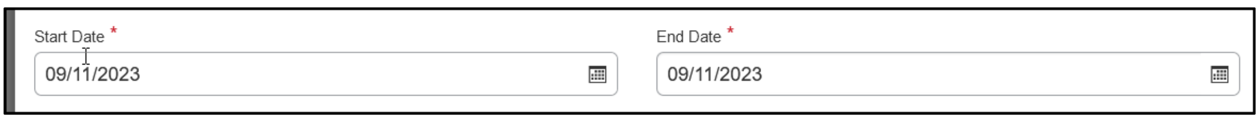
3. "Create New Request" screen will display. Enter the name of the conference or event name as shown on the flyer under "Request Name". (Ex: CABE, Spring CUE, AVID, Legislative Policy Meeting)
All fields marked with an * requires an entry. The greyed-out field cannot be modified



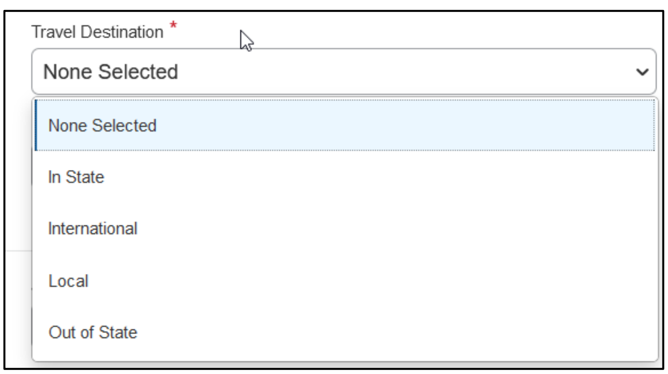
4. Select the appropriate trip activity from the "Trip Activity Type List" drop-down selection options.



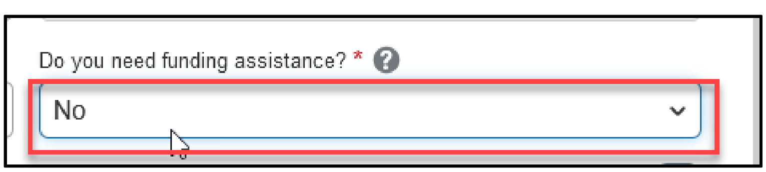
5. Enter "Start Date" and "End Date." Start Day is the day employee is leaving and End Date is the day the employee is returning.



6. 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

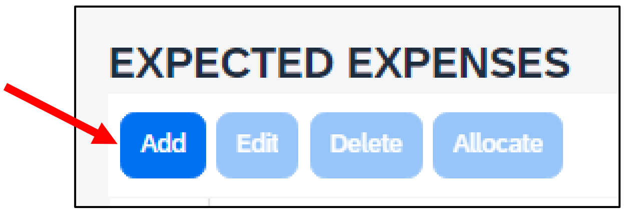


7. Choose YES if you need the Site Travel Specialist to fill out the expense budget line (funding allocation) for you. NO if you do not need assistance.

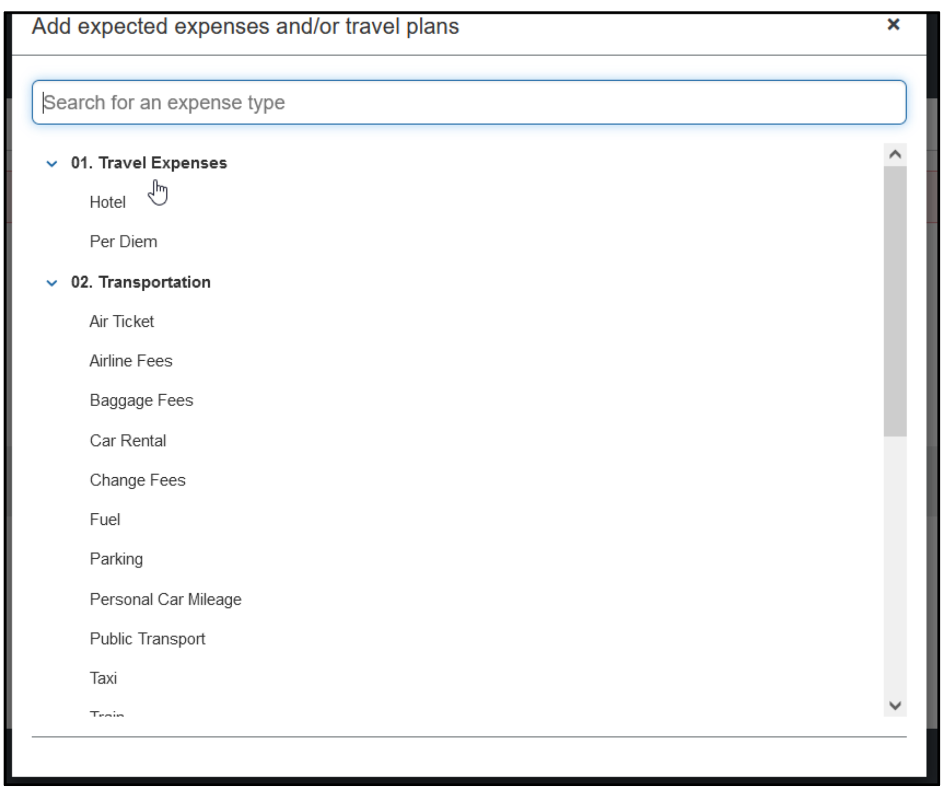


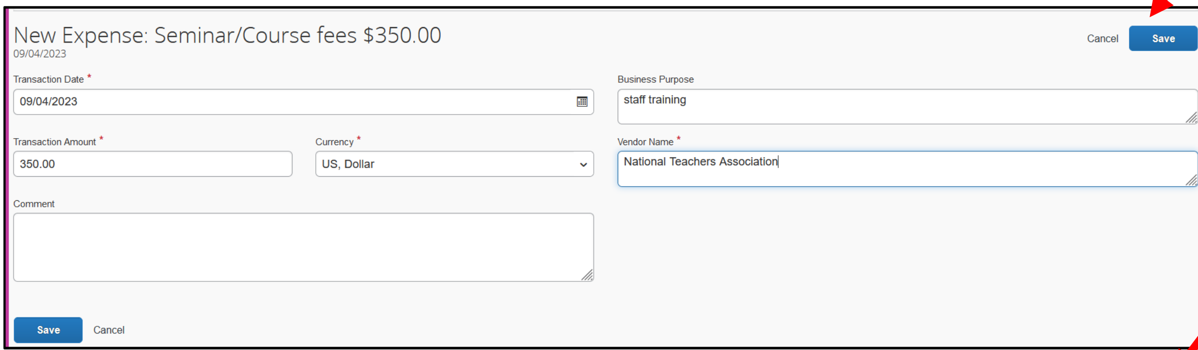
8. When you completed filling out the page, click on “Create Request”.

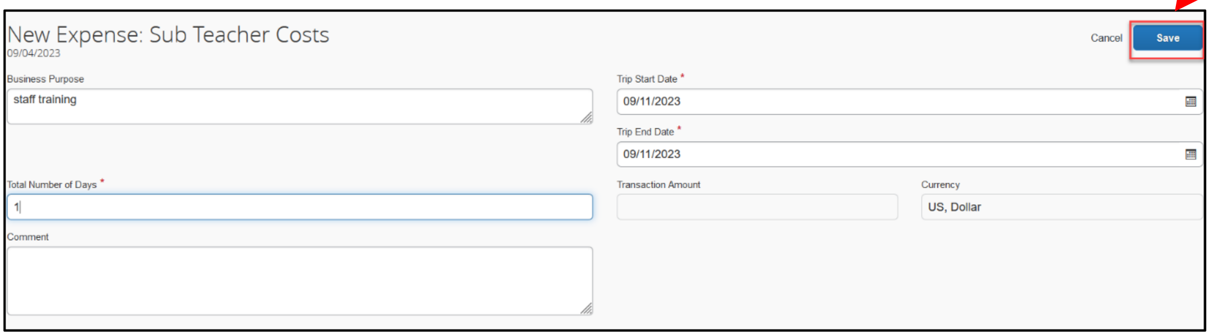
9. Click on “Add” to start inputting your travel expenses. Hotel, airfare, per diem, conference fee, etc.
   ** If it is a no-cost ($0) trip, add the conference fee and enter the total amount of $0. Allocation of the funding is still required (after adding the conference expense, skip to # 14)



10. 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

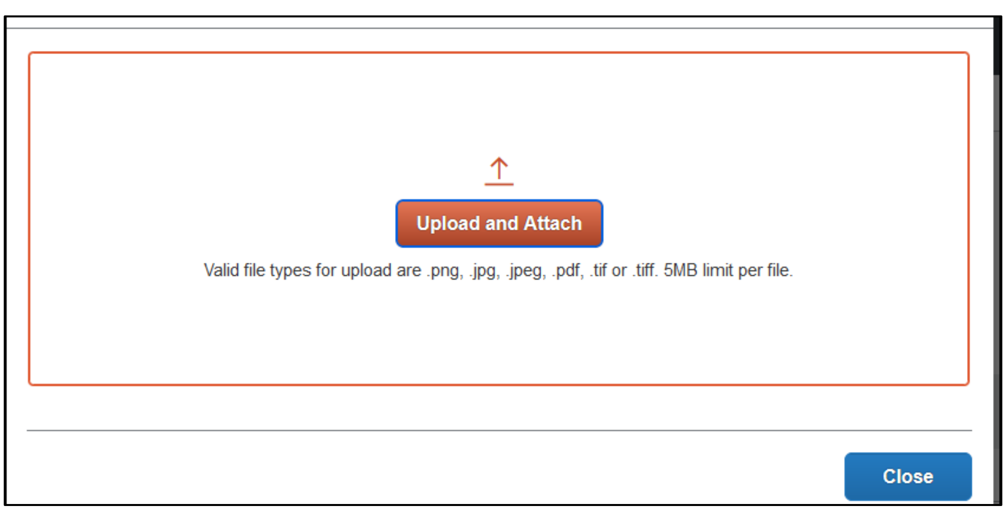




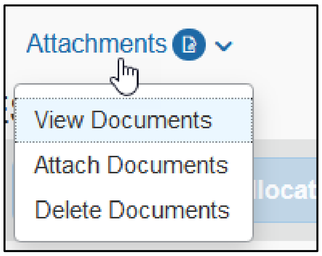


11. Once you completed adding all estimated expenses for the trip, click on "Attachments" → "Attach Documents" to add the required supporting documentation, such as a conference agenda or quotes for estimated airfare or hotel expenses.

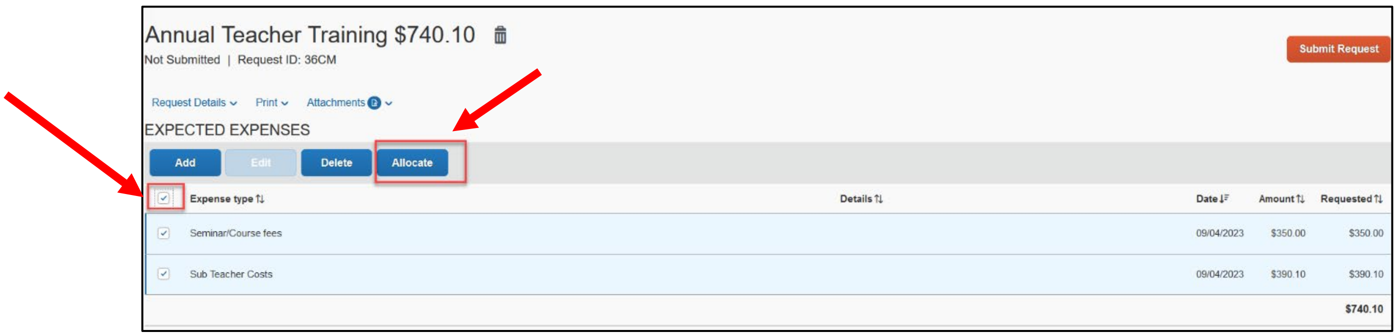
12. Click "Attachments" → "Attach Documents" to upload required documents. You can drag the files into the box or click on "Upload and Attach" to upload supporting documents.



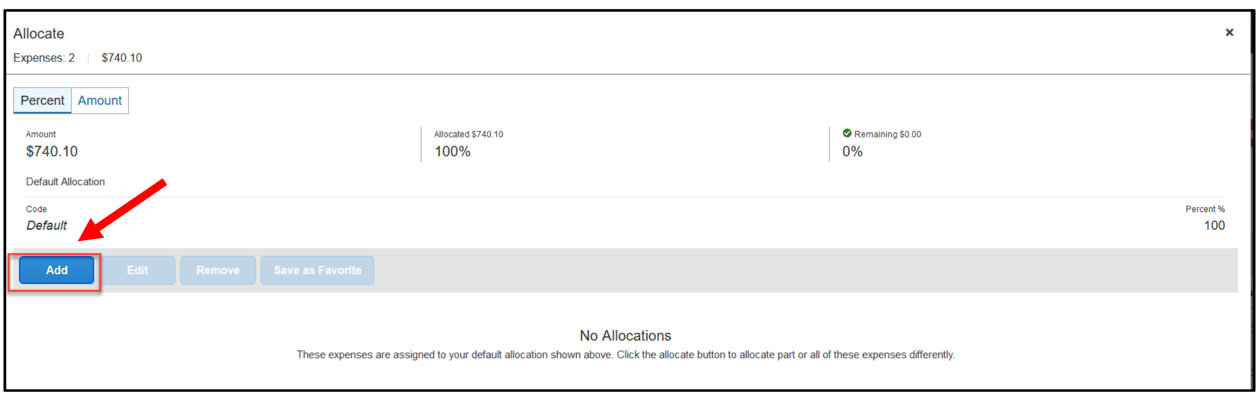
13. Once an attachment has been uploaded, you should see the options to view, attach, or delete documents.



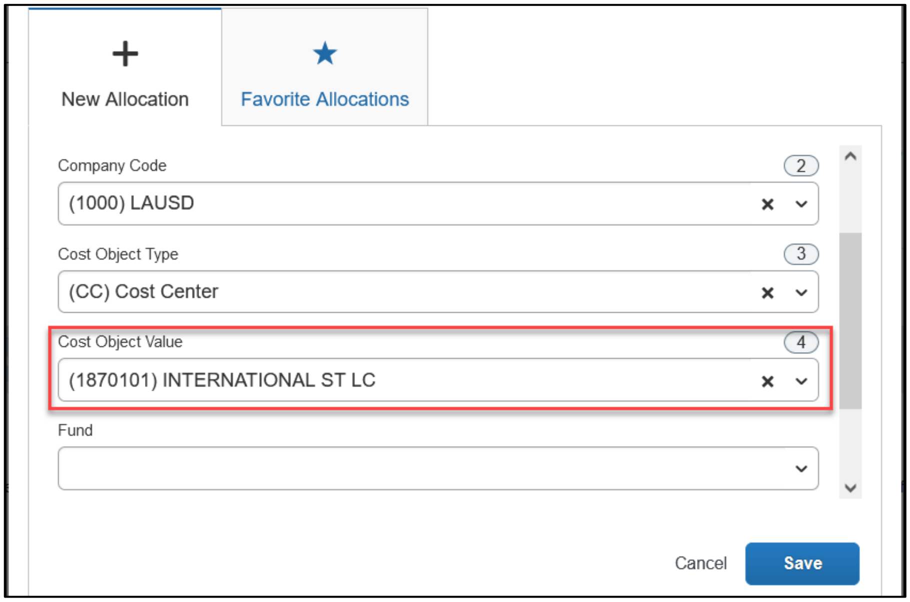
14. If you are entering in the expense budget line (funding allocation). Checkmark to highlight the expenses and click on "Allocate." Skip this step if the Site Travel Specialist is providing the funding.



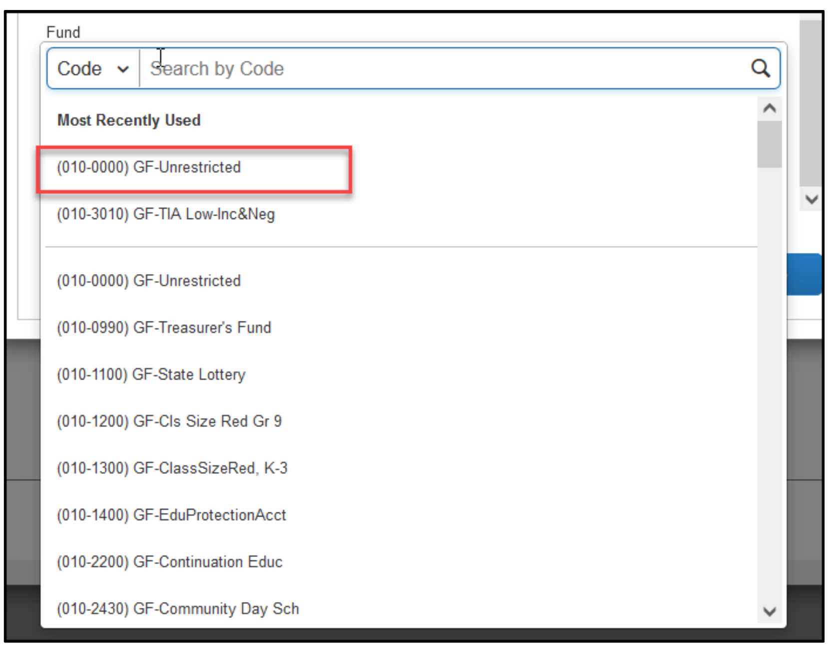
15. Click "Add."



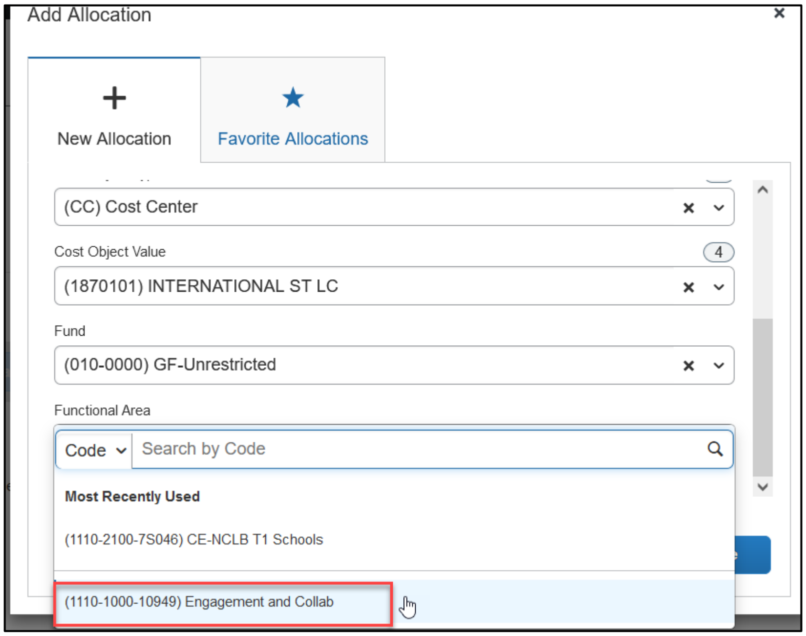
16. By default, the "Cost Object Value" is set to your home cost center; If the funding is being provided by a different cost center, change this value.



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



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

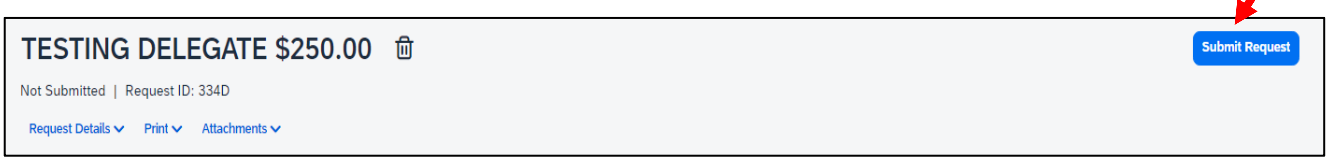


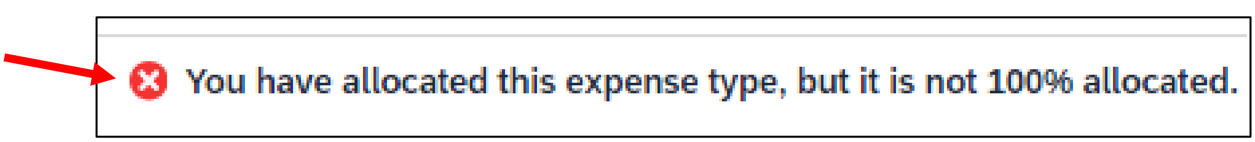
19. Click "Save" when done. Then click "Save" again.

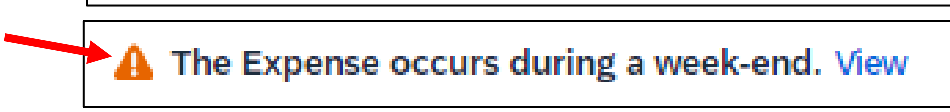
You can split funding by Percent or Amount if necessary. To add another expense budget line, click "Add" (step 18). You can allocate in percentages or in exact amount

20. Click on "Submit Request" to submit the request.

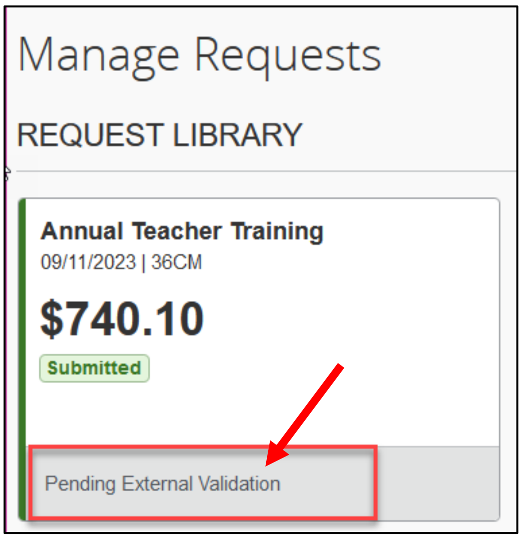
**If you have a red X warning sign, you will not be able to submit the request until you act on the error message. You can still submit the request with the orange warning sign



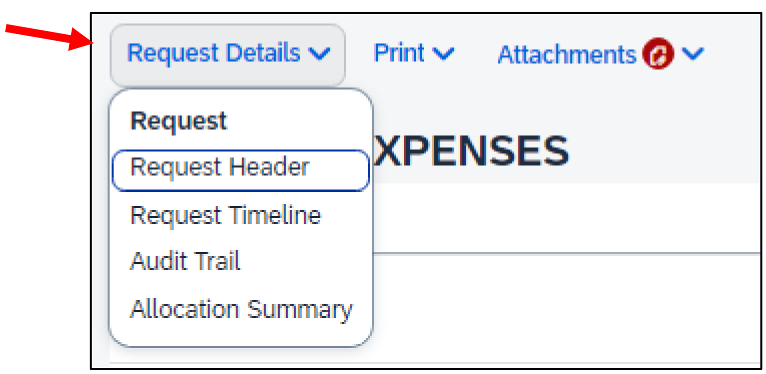




21. Once the request has been submitted, the tile for the Expense Report will show "Pending External Validation". If budget check is successful, the request will route to the appropriate approvers. If budget check fails then the request will return with an error message.
If the request was submitted with "Yes" to funding assistance by Site Travel Specialist, then it will first route to the STS to complete the funding allocation information. The request tile will display the name of the STS. (Example: Pending with ______)



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



23. 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.